

Part 5 Managing Groups

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

- Groups are “owned” by the agency who 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.

Manage Records
Add Record:
• [and upload file](#)
• [without a file](#)
• [as a Birth, Marriage or Death \(BMD\) e](#)
Search or Update Record
• [Prooflist](#) [last added first, from the inde
• [Top 100 Records](#) [aka: the last 100 rec
database]
• Record id:
Add/Edit Publication
Add/Edit Issue
Add Batch/Edit Templates
Manage Comments/Testimonials
List All Comments
Unreviewed Testimonials: for this agency
All Testimonials (and Search/Filter): for th
Manage Groups
[Add or Update Record Group](#)
Manage Exhibits
Add or Update Exhibit
Manage Application

5.1 Creating a group

There are two ways to add a new group.

One way is from the Main Menu; the other is from within the Group tab during record management.

To add a group from the Main Menu, click on Add or Update Group under the Manage Groups section. You will be presented with the Update/Add Groups screen.

Main Menu >> Update/AddGroups

Scroll to the bottom of the page to add a new group.

Name	Update	Records	Public/Private	Open/Closed	Shared	Associate Agency
Agnes Macphail's papers	Update	1	Public	Open	Exclusive	False
BC Royal and Special Commissions: 1872-1980	Update	5	Public	Open	Exclusive	False
Bun Yarwood Photograph Collection	Update	2	Public	Open	Exclusive	False
editing group	Update	1	Private	Open	Exclusive	False

Add New Group by entering Title :

[Go!](#)

(50 characters max)

Main Menu >> Update/AddGroups

To add a group from within a record, go to the Groups tab.

Jump to: [Add Group](#)

Display | File/Tech Data | Descriptive Data | Geographic Data | Administrative Data | **Groups** | Links | Delete

Group Management

This record is currently assigned to the following groups:

None

Additional Groups

- ☐ Ontario Islands (5)
- ☐ Petawawa (4)
- ☐ Price Family scenes (10)
- ☐ Shared Group about Ontarians in Scotland (4)
- ☐ Soo Locks (private Viewmaster reels) (1)
- ☐ Test group (2)

[Add to Groups](#) [Reset](#)

Add New Group by entering Title :

[Go!](#)

(50 characters max)



Full Image

Reverse

☒ Text from Reverse of Postcard

No Comments

In either case:

- Scroll to the bottom of the page.
- Enter the title of group you are creating
- Click on the Go button

Full Record

Adding a Full record for your Group is a **new feature**. This is a searchable record and displays like other VITA records i.e. in results and as a Details screen.

YourOrg >> Search (Advanced) >> Results Search: Go

We found 20 matching items.
Media Types: Groups Sort by: Relevance

Page 1 of 1



Scrapbooks from Terrace Bay & Schreiber
...A collection of scrapbooks and albums about and from the local Women's Institutes and other community groups....

Scrapbooks from Terrace Bay and Schreiber

Description

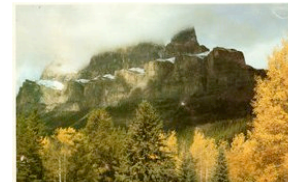
Comments (0)

Media Type:
Group

Description:
A collection of scrapbooks and albums about and from the local Women's Institutes and other community groups

Copyright Statement:
Copyright status unknown. Responsibility for determining the copyright status and any use rests exclusively with the user.

Contact Us!:
Training data set
Email: info@ourdigitalworld.org
URL: <http://ourdigitalworld.org/>
Mail: Our address
Our phone number
For inquiries about any news content, contact archives@ourdigitalworld.org



Comment on this item	
Create electronic postcard	
Records	
	Terrace Bay Recreation News
	Journey to yesteryear
	Womens Institute Scrapbook 1
	Women's Institute Scrapbook 2

A few notes about how to use the Full record:

There is a lot of value in adding a full record about the Group **as a unique, curated item** using the VITA templates. Keep in mind, though, that each record you've included in the group already has a description, so re-describing every object here might not be the best use of your time.

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)

Display	File/Tech	Description	Geography	Admin	Groups	Links	Delete
<p>No Item Type has been assigned.</p> <p>Sortable Date has not been assigned.</p> <p>Earliest Year has not been assigned.</p> <p>Latest Year has not been assigned.</p> <p>No Files have been attached.</p> <p>No records have been attached to this group yet.</p>							

5 a. File/Tech


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.

Page 1 of 1




Community Contributed


Non-Public



Boats and Ships



Agnes Macphail Papers



Travels in Scotland

In the details screen, no image appears unless a regular display file is assigned to the record:

Travels in Scotland

Description

Comments (0)

Media Type:
Group

Copyright Statement:
or something profound

Contact:
Test 4.0.1 Database stuff
Email: info@ourdigitalworld.org
WWW address: <http://www.someurl/>



Comment on this item

Create electronic postcard

Groups of Related Records

Agnes Macphail Papers

Records

5 b. Description

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

Robbie Burns Cottage

Description

Comments (0)

Creator:
Agnes Macphail

Media Type:
Image
Text

Item Type:
Postcards

Description:
A postcard sent from Agnes Macphail to her sister, Mrs. Duke Clunas, from Scotland.

Inscriptions:
Mrs Duke Clunas
Harriston, Ont Canada
Sept 9 / 52
Dear Jean: Thanks for your letter -- it was very welcome. Glad holiday was enjoyable. Uncle Orrin is very low -- too bad. We leave for England in the morning. I go to London. Mrs. Willmot other other places. Been more than a month in Scotland -- too cold now. Agnes

Date of Original:



Comment on this item
Create electronic postcard
Full Image
Reverse
Groups of Related Records
Training Postcards Collection
Other Web sites/External links
Agnes Macphail Digital Collection
Robert Burns website

As well, the group will be listed in the Advanced Search screen Groups Panel.

Groups:

Scroll down to select

Scroll down to select

Olde Sandwich Towne

Things Sepia

Training Postcards Collection

Windsor & Area Historical Buildings

search to:

ers (5) ☐ Object (5) ☐ Publication (1)

... or Item Ty

to:

[Scroll down to sele

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.

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:

Media Types	
Image (1)	Media Type to limit search to: <input type="radio"/> Audio (1) <input type="radio"/> Collection (2) <input type="radio"/> Exhibits (5) <input type="radio"/> Genealogical Resources (7) <input type="radio"/> Groups (20) <input type="radio"/> Image (28) <input type="radio"/> Newspapers (20) <input type="radio"/> Object (7) <input type="radio"/> Publication (8) <input type="radio"/> Text (37) <input type="radio"/> Web site/page (1)
Text (3)	
Exhibits (1)	
Groups (1)	

You can add multiple media and item types.

The Title is carried forward from the Add/Update screen.

The other fields are open for you to add additional information and custom content.

Note: what you are describing is the Group and it's 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.

Public Display?
☒ Yes
☐ No

Media Type
☐ Image
☐ Text
☐ Collection
☐ Video
☐ Object
☐ Audio
☐ Publication
☐ Genealogical Resource
☐ Newspaper
☐ Place

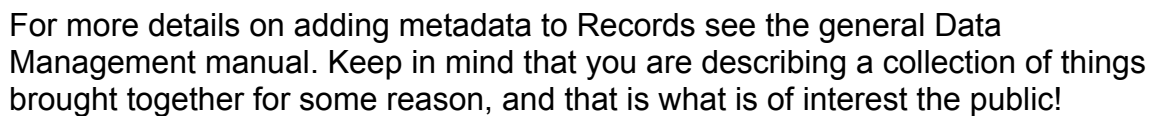
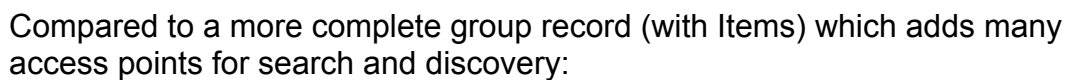
Group
 This value determines a number of other options for this record. To change it [click here](#).

Secondary Media Types
☐ Image
☐ Text
☐ Collection
☐ Video
☐ Object
☐ Audio
☐ Publication
☐ Genealogical Resource
☐ Newspaper
☐ Place

Item Type
 Enter item type:

Title
 Agnes Macphail Papers

Here's a bare-bones Group record in public display that does not add any searchable content to the index (remember, it has NO items at this point):



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

A very brief template wherein the group record language, CC license, copyright status and copyright holder information can be captured.

Group Management

Like any record, you can add a group to another Group. See Groups & Subgroups below.

5 f. Links

Use this screen to add URLs and labels for linking the group record to other online resources.

Delete group

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

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

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

Update Travels in Scotland

There are 1 record(s) in this group.

Title	<input type="text" value="Travels in Scotland"/>
Caption	<input type="text"/>
Exclusive or shared group	<input checked="" type="radio"/> Exclusive: Group only contains Test 4.0.1 Database stuff 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)
Public display	<input checked="" type="radio"/> Yes <input type="radio"/> No If yes then this group will appear in the side panel in the public displays. If no then it will only be used as an private group for the purposes of data management.
Closed List	<input type="radio"/> Yes <input checked="" type="radio"/> No A closed list is one with a specific set number 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.
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.

Main Menu >> Search >> Results

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

File/Tech	Description	Geography	Admin	Groups	Links	Delete
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Group Menu

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

No Item Type has been assigned.
Sortable Date has not been assigned.
Earliest Year has not been assigned.
Latest Year has not been assigned.
No files have been attached.

This collection includes 5 item(s). You must unassign those item records before deleting the collection record. See items here.

Note: None of the records that you "linked" to this group will be deleted ... only the references from this group to them.




BC Royal and Special Commissions: 1872-1980

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

Records assigned to "Agnes Macphail Papers"

This group is managed by **Test 4.0.1 Database stuff**.
 There are **11** records from your agency currently assigned to this group.
 To unassign records from this group, click the "Select all records" button, and then click the "Unassign selected records" button.

Your agency's records in this group

	 <input type="checkbox"/>
	<input type="checkbox"/> Dear friend
	<input type="checkbox"/> Proton Township

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

Records assigned to "Travels in Scotland"

This group is managed by **Test 4.0.1 Database stuff**.
 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 "Travels in Scotland"](#).

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

Update Travels in Scotland

There are **0** record(s) assigned to this group.

Title	Travels in Scotland
Caption	
Exclusive or shared group	<input checked="" type="radio"/> Exclusive: Group only <input type="radio"/> Any Agency: Group only
Public display	<input checked="" type="radio"/> Yes <input type="radio"/> No If yes then this group will appear in the public display
Closed List	<input type="radio"/> Yes <input checked="" type="radio"/> No A closed list is one with a select list. A select list is a closed list. No more than one select list per group.
Delete List	A list can only be deleted if it is a select list.

Group Settings

Main Menu >> Update/AddGroups >> Update "Agnes Macphail's papers" >>

Update Agnes Macphail's papers

Group Menu	Exclusive or shared group	There are 1 record(s) in this 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)
Full record		
Group settings		
Show records	Closed List	<input type="radio"/> Yes <input checked="" type="radio"/> No A closed list is one with a specific set number of records in it, with no more expected. For example, a set of five illustrations from a particular newspaper article might be a closed list. No more are expected. Closed lists are not made available in selection lists for additional records to be added to them. They might well be public.
Sort records	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 Agnes Macphail's papers Reset Form		

Exclusive or Shared Groups

Main Menu >> Update/AddGroups

Scroll to the bottom of the page to [add a new group](#).

Name	Update	Records	Public/Private	Open/Closed	Shared	Associate Agency
Agnes Macphail's papers	Update	1	Public	Open	Exclusive	False
BC Royal and Special Commissions: 1872-1980	Update	5	Public	Open	Exclusive	False
Bun Yarwood Photograph Collection	Update	2	Public	Open	Exclusive	False
editing group	Update	1	Private	Open	Exclusive	False

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 assigned to "Agnes Macphail Digital Collection"

This group includes records with any relation to or about Agnes Macphail, the first woman Member of Parliament in Canada.

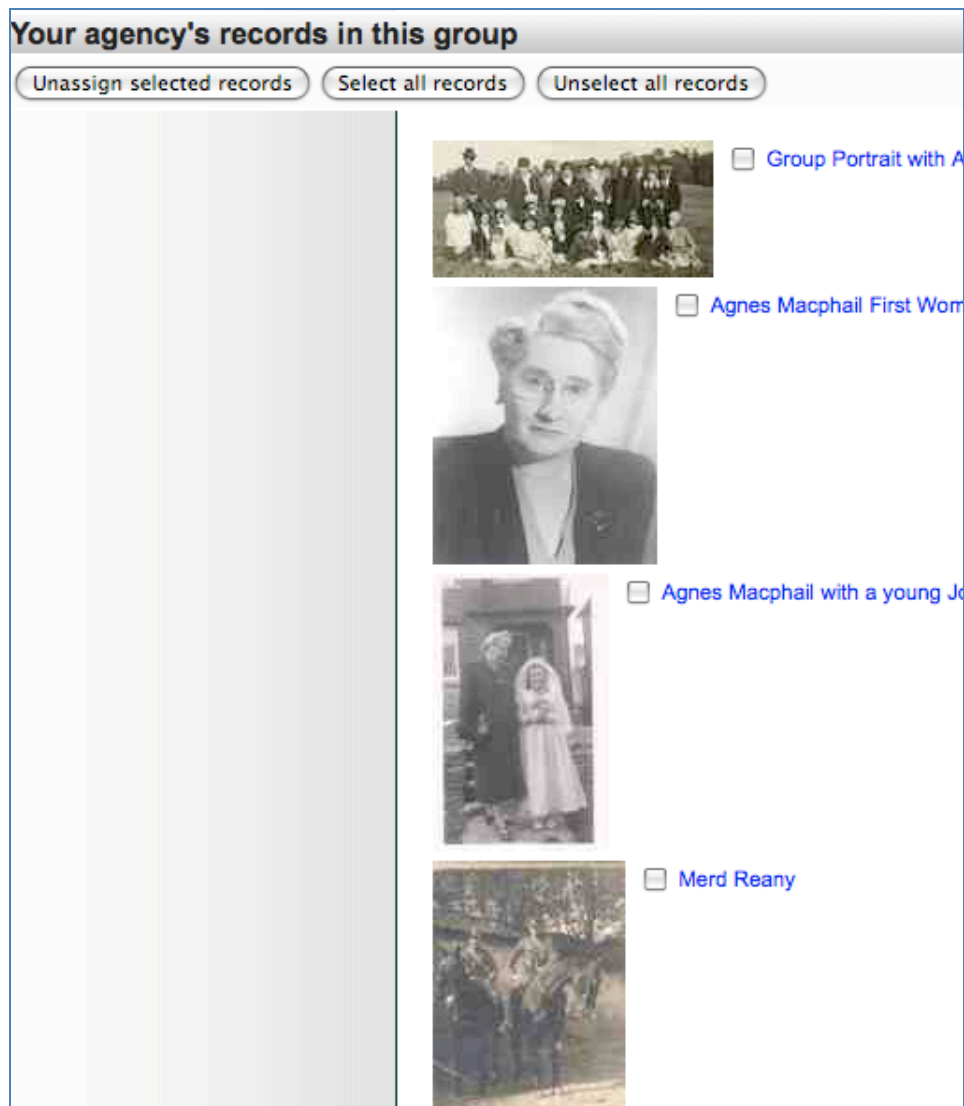
This group is managed by **Grey Highlands Public Library**.

There are 55 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.

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.

Contributor record management in View Records screen allows select/unselect and un-assign options:



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




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 Group – A Group can only be deleted by the “owner” agency and only when all the records associated with it have been unassigned. Start by clicking the link to View the Records in this Group and then select all records and unassign selected records. (see also Full record > delete above)

to unassign records from this group, check the checkbox in the left margin, click the "Select all records" button, and then click "Unassign selected records"

Your agency's records in this group



☒ Postcard from Scotland

You will see a confirmation screen.

Records assigned to "New Group"

This is a collection of records based on a theme (e.g. Travel Correspondence of Agnes Macphail), common attribute (e.g. Pictures of Scottish Cottages), or stage in an internal workflow (e.g. Records that need editing)

This group is managed by **Training 3.4**.

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 "New Group"](#).

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

Update New Group

There are **0** records(s) in this group.

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

5.2 Updating/editing a group

In the main menu, click on Add or Update Record Group in the Manage Groups section. You will be presented with the Update/Add Groups screen and a list of groups created by your agency.

To update the values for the group:

Main Menu >> Update/AddGroups

Scroll to the bottom of the page to add a new group.

Name	Update	Records	Public/Private	Open/Closed	Shared	Associate Agency
Agnes Macphail's papers	Update	1	Public	Open	Exclusive	False
BC Royal and Special Commissions: 1872-1980	Update	5	Public	Open	Exclusive	False
Bun Yarwood Photograph Collection	Update	2	Public	Open	Exclusive	False
editing group	Update	1	Private	Open	Exclusive	False

- Click Update
- The Update link will take you to 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) Full record> Show records

Main Menu >> Update/AddGroups >> Update "Agnes Macphail's papers" >>

Update Agnes Macphail's papers

Group Menu	Exclusive or shared group	There are 1 record(s) in this group.
Full record	<input checked="" type="radio"/> Exclusive: Group only contains Training data set records	
Group settings	<input type="radio"/> Any Agency: Group available to any agency and will appear in every agency's group management interface (unless it is closed)	
Show records	Closed List	<input type="radio"/> Yes
Sort records	<input checked="" type="radio"/> No	A closed list is one with a specific set number of records in it, with no more expected. For example, a set of five illustrations from a particular newspaper article might be a closed list. No more are expected. Closed lists are not made available in selection lists for additional records to be added to them. They might well be public.
	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 Agnes Macphail's papers	Reset Form

From here, you can review and manage Group contents ...

Records assigned to "Scrapbooks from Terrace Bay and Schreiber"

Group Menu
Full record
Group settings
Show records
Sort records

A collection of scrapbooks and albums about and from the local Women's Institutes and other community groups


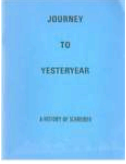

This group is managed by **Training data set**.

There are **4** records from your agency in this group.

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

Your agency's records in this group

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

Record	Unassign
	<input type="checkbox"/> Terrace Bay Recreation News
	<input type="checkbox"/> Journey to yesteryear
	<input type="checkbox"/> Womens Institute Scrapbook 1

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 un-select buttons 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

- see what's in your group
- deselect or "unassign" one or more items from the Group using the checkboxes and labeled buttons at the top and bottom of the screen

Records assigned to "Agnes Macphail Papers"

This group is managed by **Test 4.0.1 Database stuff**.

There are **11** records from your agency in this group.

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

Your agency's records in this group

Unassign selected records Select all records Unselect all records

☐ Robbie Burns House

☐ Dear friends...

☐ Proton Township Girl Shoots Father

5.3 Sort group records

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, particularly those that would be the first 3 of a large group, or 10 of a smaller group since they appear with the group record. You can order every item in the group to customize their display in the gallery. This **fixes** their display order, however, so end users cannot re-sort those objects using other criteria.

Scrapbooks from Terrace Bay and Schreiber

A collection of scrapbooks and albums about and from the local Women's Institutes and other community groups

Group Menu
Full record
Group settings
Show records
Sort records

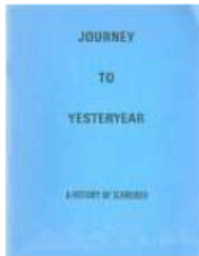


Step 1: Sort the Images

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



Terrace Bay Recreation News



Journey to yesteryear



Womens Institute Scrapbook 1



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


[Main Menu](#) >> [Update/AddGroups](#) >> [Update "Agnes Macphail Papers"](#) >> [View Records in "Agnes Macphail Papers"](#)

Agnes Macphail Papers


Step 1: Sort the Images


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







Robbie Burns House







Proton Township Girl Shoots Father





Green's Directory, 1939





Dear friends...

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



Old Flesherston Advance Building, Flesherston



Bee Barn, Hill Street, Flesherston



Local Colour Art Gallery, Flesherston



Cast of Agnes Macphail play



Murray Juffs as Agnes Macphail with Kris Kinsman and George Allen



Reunion Drama Club: Fiddler on the Roof



Reunion Drama Club: Guys & Dolls

After Re-Sorting your Group content, **preview the new record order** by clicking 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.

Remember: Preview is a superficial view option, but “Commit the Changes” will reindex all the records in this group—this takes time, depending on the size of a group.

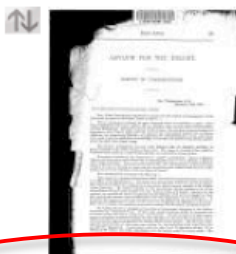
Use the Preview option liberally—Commit only when you’re sure!



Royal Commissions 1943-1980



Royal Commissions 1943-1980:



Asylum for the Insane Report

Step 2: Commit the Changes





Once the reindexing has occurred, you will receive a confirmation message.

You have re-sorted the records. If you are satisfied go to step 2 and commit the changes

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 place between 1 and 2)


- | | | |
|--------------------------------|--|---|
| <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="4"/> |  | Commercial Hotel, Priceville |

To adjust order on the preview screen, use .5 to fit items between two others.

For example, in this list, there are three images from a series but that are out of order. The first two are paired beside each other:

- | | | |
|---------------------------------|---|--|
| <input type="text" value="26"/> |  | William Stephens, Grey Sauble Conservation Authority |
| <input type="text" value="27"/> |  | Bob Lennox, Grey Sauble Conservation Authority, and representative |

And another from that series was orphaned during the first numbered sorting process:

47		Flesherton & District Farmer's Market
48		Bob Lennox Grey Sauble Conservation Authority
49		Dedication at Evergreen Cemetery

To insert the orphan within the series, add .5 to the image number you want the orphan to **follow** in the group order:

47		Flesherton & District Farmer's Market
26.5		Bob Lennox Grey Sauble Conservation Authority
49		Dedication at Evergreen Cemetery

Click "Update Record Order"...



And the orphan is placed between the two other images in the series:

26		William Stephens, Grey Sauble Conservation Authority
27		Bob Lennox, Grey Sauble Conservation Authority
28		Bob Lennox, Grey Sauble Conservation Authority, and representative

Commit the Changes to reindex the group records:

54		Flesherton
Update record order		
Step 2: Commit the Changes		



Once an order is determined and committed, any new records added to the group will “float” to the top of the order list and the display order, and so will have to be reordered.

Remember:

- Committing changes to the group sort order affects the order display on both the data management and the public views
- This means that end users on the public side cannot sort objects in a group using the facet panel options once this order is committed to the index

- Sorting on this screen works for groups no larger than 100 records, for larger groups, the user can sort group objects with the facet panel on the public side.

5.4 Adding records to a group

Add items to groups

To start populating your Group, return to the Main Menu and use the Search link to find items in your collection that match your group criteria. You might see the new group record in your results list (as below)

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](#)

[Main Menu](#) >> [Search](#) >> [Help](#) >> [Add record](#) [Reset checklists](#)

KEYWORD(S) TO SEARCH: <input type="text" value="macphail"/>		
Logic between keywords: <input checked="" type="radio"/> And <input type="radio"/> Or <input type="radio"/> Phrase	Field(s) to Search: <input checked="" type="radio"/> All <input type="radio"/> Title <input type="radio"/> Subject <input type="radio"/> Creator Name(s) <input type="radio"/> Last Name <input type="radio"/> Personal Name(s) <input type="radio"/> Corporate Name <input type="radio"/> Local Identifier	Fuzzy Search Limits: (What is this?) <input checked="" type="radio"/> Exact <input type="radio"/> Fuzzy <input type="radio"/> Fuzzier <input type="radio"/> Fuzziest
BETWEEN TWO DATES: (enter in the form YYYYMMDD, YYYYMM or YYYY) after: <input type="text"/> before: <input type="text"/>		
... OR FUZZY DATE: Enter year: <input type="text"/> how fuzzy? <input type="text"/>		

Search results...

We found **6** matching items.

Keywords: macphail **Sort:** Relevance

Page 1 of 1



[Agnes Macphail Papers](#)

This is the Group record



[Proton Township Girl Shoots Father](#)

"Proton Township Girl Shoots Father," Markdale Standard (1888), 19420430, p. 4, column 2
Ruby Campbell is the niece of Agnes Macphail

These are item records



[Robbie Burns test](#)

Sept 9, 1952, A postcard sent by Agnes Macphail to her sister during her trip to Scotland.
Local Identifier: JB017



[GHPL manual](#)

... POST-PROJECT PLANNING 20 RECOMMENDED READING
..... 21 APPENDIX A: GHPL PROJECT PLAN & MONTHLY OUTLINE

- Open a desired item record
- go to Groups tab
- select Group from list
- click Update...

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

[Add BMD](#) [Add article/clipping](#)

Jump to: [Add group](#)

Display	File/Tech	Description	Geography	Admin	Groups	Links	Delete
---------	-----------	-------------	-----------	-------	--------	-------	--------

Group Management: Proton Township Girl Shoots Father (id: 72070)

No Cor

No Files have been attached.

This record is currently assigned to the following groups:

None

Additional Groups

- ☒ [Agnes Macphail Papers](#) (0) **Exclusive**
- ☐ [BMDs and Clippings](#) (20) **Shared**
- ☐ [Boats and Ships](#) (11) **Exclusive**
- ☐ [Boats and waterways](#) (42) **Shared**

- ☐ [Schooners in Rivers \(3.4\)](#) (4) **Shared**
- ☐ [Testimonials](#) (6) **Shared**
- ☐ [Tracks \(3.5\)](#) (7) **Shared**
- ☐ [Travels in Scotland](#) (1) **Exclusive**

Add New Group by entering Title :

(50 characters max)

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

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

To select the next item, click the Results link in the navigation bar

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

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

[Add BMD](#) [Add article/clipping](#)

Jump to: [Add group](#)

Display	File/Tech	Description	Geography	Admin	Groups	Links	Delete
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Group Management: Proton Township Girl Shoots Father (id: 72070)

No Files have been attached.

This record is currently assigned to the following groups:

None

Additional Groups

- ☐ [Agnes Macphail Papers](#) (0) **Exclusive**
- ☐ [BMDs and Clippings](#) (20) **Shared**
- ☐ [Boats and Ships](#) (11) **Exclusive**
- ☐ [Boats and waterways](#) (42) **Shared**
- ☐ [Community Contributed](#) (55) **Shared**