GROUP MANAGEMENT SCREEN



One of the features of VITA is the ability to create "groups" of records. The Groups screen allows you to manage your records within the Groups context. Creating and aggregating records into groups is not only best practice for organizing and managing your collection, it will also prove useful for creating Virtual Exhibits.

There are several ways you can add a record to a group. The fastest way is to use the checklist function to add your records to a group. Simply find the appropriate group on the check list, i.e., Postcards:

Group Management: Old Guelph (id: 1048) This record is currently assigned to the following groups: None Additional Groups Show/Hide Shared Groups Associate Agency Example (1) Exclusive Audio Recordings (1) Exclusive **BMDs** (1) Exclusive Community Newspapers (0) Exclusive Horticultural Society Collection (0) Exclusive New group (1) Exclusive Newspapers (3) Exclusive Old Maps of Ontario (7) Exclusive Postcards (6) Exclusive Special Group (1) Exclusive Stories from Proton, Ontario (0) Exclusive Testimonials (2) Shared The Green Family Postcard Collection (1) Exclusive Training dataset local newspapers (0) Exclusive User Contributions: Training dataset (0) Exclusive Videos (2) Exclusive Virtual Exhibits (1) Exclusive VITA Toolkit Training Manuals (4) Exclusive Update Add New Group by entering Title: Go! (50 characters max)

Select it, then click on **Update**

The record is now added to the Postcards group

Group Management: Old Guelph (id: 1048)

	This record is currently assigned to the following groups:
V	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 (1) Exclusive
	Newspapers (3) Exclusive
	Old Maps of Ontario (7) Exclusive
	Special Group (1) Exclusive
	Stories from Proton, Ontario (0) Exclusive
	Testimonials (2) Shared
	The Green Family Postcard Collection (1) Exclusive
	Training dataset local newspapers (0) Exclusive
	User Contributions: Training dataset (0) Exclusive
	Videos (2) Exclusive
	Virtual Exhibits (1) Exclusive
	VITA Toolkit Training Manuals (4) Exclusive
	Update Reset
	Add New Group by entering Title :
	Go!
(50 characters max)	

To remove a record from a group, go to the groups tab on the record's page, uncheck the group (s) that you want the record removed from, then click **Update**.

If the group you want to add the record to is not in the check list, you can use the **Add New Group** input box as a shortcut to create a new group. Type the name of the group you wish to create in the title field, then click on **Go**

Group Management: Old Guelph (id: 1048)

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You are now on the Group settings page.



On this page, you can create a full record for your group, choose the group settings, show the records that have been added to the group and even sort the order on how the records will display. More information on how to create and manage groups can be found in the Managing Groups manual on the <u>VITA Toolkit Help site</u>.

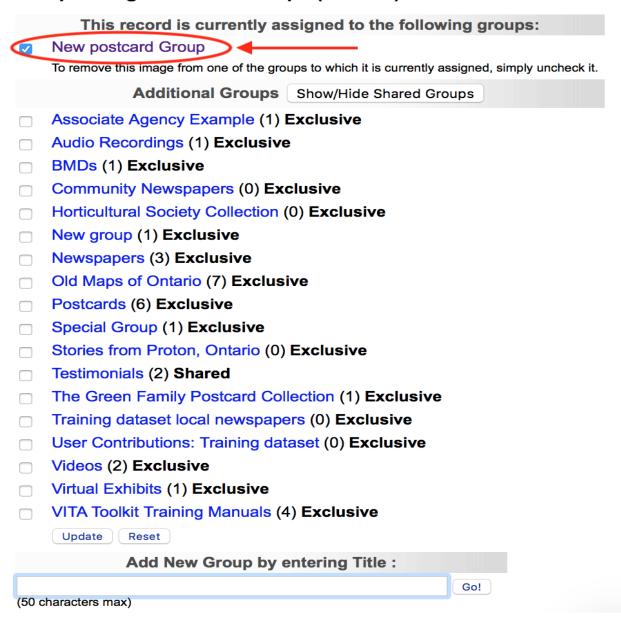
In this instance however, we simply want to ensure that our postcard has been put into the correct group. To do this, click on Show records:





If we return to the **Groups screen** – by clicking on your browsers back button, or clicking on the record, i.e., Old Guelph – we can see that the record has been added to the newly created group:

Group Management: Old Guelph (id: 1048)



You can add a record to as many groups as is appropriate

Groups can also be managed from the main menu under **Manage Groups**. Check the Managing Groups manual on the VITA help site for more details.

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:
 go

Add/Edit Publication

Add/Edit Issue

Add Batch/Edit Templates

Manage Comments

List All Comments

Manage Groups

Add or Update Record Group

Manage Exhibits

Add or Update Exhibit

Manage Application

Agency Management Site Management

Monthly Statistical Snapshot

Logout