PART 2

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 workflow.

2.1 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**.

At the bottom 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!**
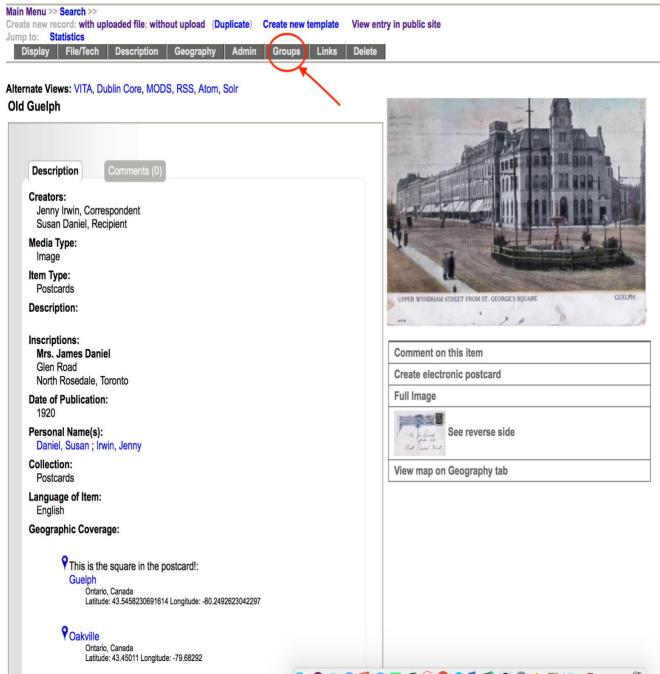
Main Menu >> Add / Update Groups

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

Name	Update	Records	Public?	Open/Closed	Shared	Associate Agency
Associate Agency Example	Update	1	Public	Open	Exclusive	Associate Agency
Audio Recordings	Update	1	Public	Open	Exclusive	
BMDs	Update	1	Public	Open	Exclusive	
Community Newspapers	Update	0	Public	Open	Exclusive	
Flesherton business photographs	Update	6	Public	Closed	Exclusive	
Guelph Postcards	Update	0		Open	Exclusive	
Horticultural Society Collection	Update	0	Public	Open	Exclusive	
New group	Update	0		Open	Exclusive	
New Postcards Group	Update	1		Open	Exclusive	
Newspapers	Update	3	Public	Open	Exclusive	
Old Maps of Ontario	Update	7	Public	Open	Exclusive	
Postcards	Update	6	Public	Open	Exclusive	
Special Group	Update	1	Public	Open	Exclusive	
Stories from Proton, Ontario	Update	0		Open	Exclusive	
Testimonials	Update	2		Open	Shared	
The Green Family Postcard Collection	Update	1	Public	Open	Exclusive	
Training dataset local newspapers	Update	0	Public	Open	Exclusive	
User Contributions: Training dataset	Update	0	Public	Open	Exclusive	
Videos	Update	2	Public	Open	Exclusive	
Virtual Exhibits	Update	1	Public	Open	Exclusive	
VITA Toolkit Training Manuals	Update	4	Public	Open	Exclusive	

Add New Group by entering Title :

New Group
(50 characters max)

Go!

Main Menu >> Update/AddGroups

Once you click on **Go,** you will land on the Group Settings screen, where you can determine how the groups you create will function.
Please see Part 2 for instructions on how to set up your Group

2.2 CREATING A GROUP FROM WITHIN THE GROUP TAB

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

Clicking on the Groups tab will take you to the Groups Management screen where you will see a list of all the groups you have created for your agency.

Group Management: Old Guelph (id: 1048)

This record is currently assigned to the following groups:

None

Additional Groups | Show/Hide Shared Groups

- ☐ Associate Agency Example (1) **Exclusive**
- ☐ Audio Recordings (1) **Exclusive**
- ☐ BMDs (1) **Exclusive**
- ☐ Community Newspapers (0) **Exclusive**
- ☐ Guelph Postcards (0) **Exclusive**
- ☐ Horticultural Society Collection (0) **Exclusive**
- ☐ New group (0) **Exclusive**
- ☐ New Group (0) **Exclusive**
- ☐ New Postcards Group (0) **Exclusive**
- ☐ Newspapers (3) **Exclusive**
- ☐ Old Maps of Ontario (7) **Exclusive**
- ☐ Postcards (6) **Exclusive**
- ☐ Special Group (1) **Exclusive**
- ☐ Stories from Proton, Ontario (0) **Exclusive**
- ☐ Testimonials (2) **Shared**
- ☐ The Green Family Postcard Collection (1) **Exclusive**
- ☐ Training dataset local newspapers (0) **Exclusive**
- ☐ User Contributions: Training dataset (0) **Exclusive**
- ☐ Videos (2) **Exclusive**
- ☐ Virtual Exhibits (1) **Exclusive**
- ☐ VITA Toolkit Training Manuals (4) **Exclusive**

[Update] [Reset]

Add New Group by entering Title :

[   ] [Go!]

(50 characters max)

Main Menu >> Search >>

To add a record to a group – or groups – simply click on the box beside that group. Once you have chosen all the groups you want, don't forget to click **Update** to commit the changes.
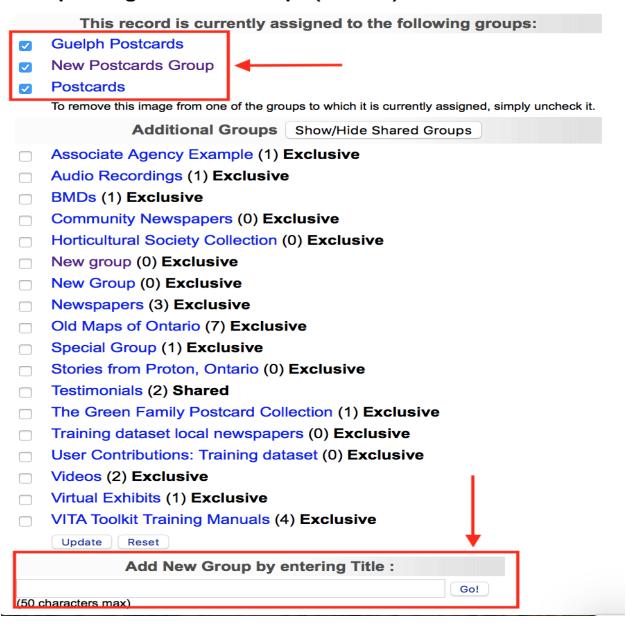
In this example, we are going to add a record to several groups:

Group Management: Old Guelph (id: 1048)

This record is currently assigned to the following groups:

None

Additional Groups [Show/Hide Shared Groups]

- ☐ **Associate Agency Example** (1) **Exclusive**
- ☐ **Audio Recordings** (1) **Exclusive**
- ☐ **BMDs** (1) **Exclusive**
- ☐ **Community Newspapers** (0) **Exclusive**
- ☑ **Guelph Postcards** (0) **Exclusive** ⟵
- ☐ **Horticultural Society Collection** (0) **Exclusive**
- ☐ **New group** (0) **Exclusive**
- ☐ **New Group** (0) **Exclusive**
- ☑ **New Postcards Group** (0) **Exclusive** ⟵
- ☐ **Newspapers** (3) **Exclusive**
- ☐ **Old Maps of Ontario** (7) **Exclusive**
- ☑ **Postcards** (6) **Exclusive** ⟵
- ☐ **Special Group** (1) **Exclusive**
- ☐ **Stories from Proton, Ontario** (0) **Exclusive**
- ☐ **Testimonials** (2) **Shared**
- ☐ **The Green Family Postcard Collection** (1) **Exclusive**
- ☐ **Training dataset local newspapers** (0) **Exclusive**
- ☐ **User Contributions: Training dataset** (0) **Exclusive**
- ☐ **Videos** (2) **Exclusive**
- ☐ **Virtual Exhibits** (1) **Exclusive**
- ☐ **VITA Toolkit Training Manuals** (4) **Exclusive**

[Update] [Reset] ⟵

Add New Group by entering Title :

[   ] [Go!]

(50 characters max)

Once you click on **Update,** the record is added to the chosen group(s):

Group Management: Old Guelph (id: 1048)

This record is currently assigned to the following groups:

- ☑ Guelph Postcards
- ☑ New Postcards Group
- ☑ Postcards

To remove this image from one of the groups to which it is currently assigned, simply uncheck it.

Additional Groups Show/Hide Shared Groups

- ☐ Associate Agency Example (1) **Exclusive**
- ☐ Audio Recordings (1) **Exclusive**
- ☐ BMDs (1) **Exclusive**
- ☐ Community Newspapers (0) **Exclusive**
- ☐ Horticultural Society Collection (0) **Exclusive**
- ☐ New group (0) **Exclusive**
- ☐ New Group (0) **Exclusive**
- ☐ Newspapers (3) **Exclusive**
- ☐ Old Maps of Ontario (7) **Exclusive**
- ☐ Special Group (1) **Exclusive**
- ☐ Stories from Proton, Ontario (0) **Exclusive**
- ☐ Testimonials (2) **Shared**
- ☐ The Green Family Postcard Collection (1) **Exclusive**
- ☐ Training dataset local newspapers (0) **Exclusive**
- ☐ User Contributions: Training dataset (0) **Exclusive**
- ☐ Videos (2) **Exclusive**
- ☐ Virtual Exhibits (1) **Exclusive**
- ☐ VITA Toolkit Training Manuals (4) **Exclusive**

  Update   Reset

Add New Group by entering Title :

[   ] Go!

(50 characters max)

You can also create new groups from within the Groups tab. The process is exactly the same as it is for creating groups from the main menu, i.e., enter the name of the group you wish to create in the **Add New Group** field at the bottom of the groups management screen, then click on **Go**.

Once you click on Go, you will land on the Group Settings screen, where you can determine the functionality of your group(s)