How to Create and Edit Groups

You can use the **Items** tab to create a ***Group***.

- A ***Group*** contains related items that have a common description and are managed together because the items' dispositions are interrelated.
- Groups are ***optional***.
- A records schedule may contain more than one group.

Note: Do **not group all items on a schedule into one group.

This document contains two example screenshots followed by instructions. Use the quick menu below to jump to the item you would like to view.

Contents

Example 1 Two groups of related audiovisual records in ERA 2.0 2

Example 2 Four groups of Press Release and Media Advisory Records 4

Create a New Group 5

Example 1 Group with two items for related audiovisual records in ERA 2.0

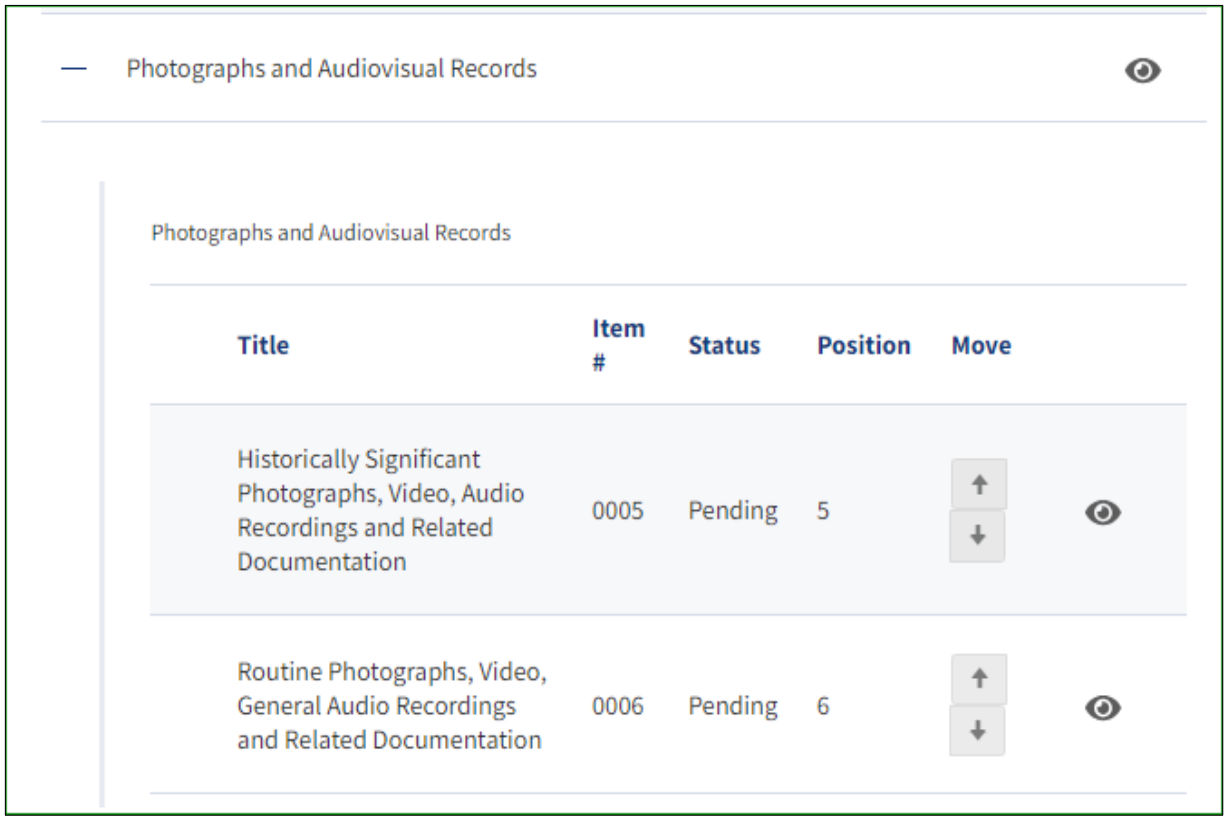

Figure 1 Photographs and Audiovisual Records Group with Two Items

The group “Photographs and Audiovisual Records” has two items in it. The items are differentiated between historically significant and routine photographs. The item description for the historically significant item describes the photographs, video, audio recordings and related documents and what makes them significant. The item description for the routine item includes photographs, video, audio recordings and related documents and what makes them routine.

Example 2 Group with 4 items for Press Release & Media Advisory Records

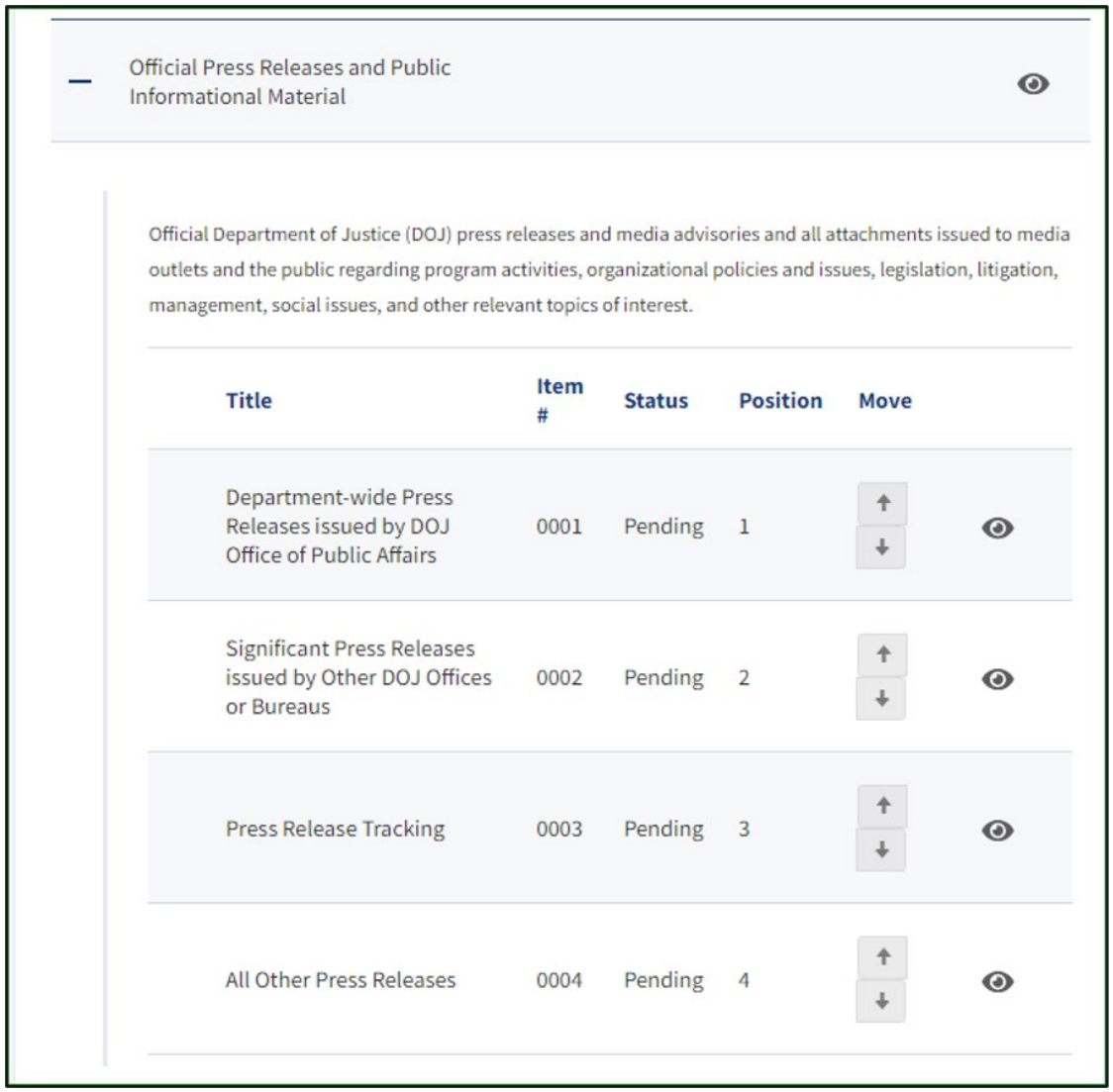

Figure 2 Press Release & Media Advisory Records with Four Items

The group " Official Press Releases and Public Informational Material" includes four items. The group description applies to all the items within the groups. The items are differentiated by the creator and by significance. The first item covers material created by the DOJ Office of Public Affairs.

Items 2 and 4 are for press releases created by other offices but differentiate between significant and all others. Item 2 describes the offices and what makes a press release significant. Item 4 describes the offices and examples of res releases that are not significant. Item 3 covers press release tracking with is for all offices and all press release types.

Create a New Group

1. Select ***Create New Group*** on the **Items** tab. The **Create Group** tab displays.

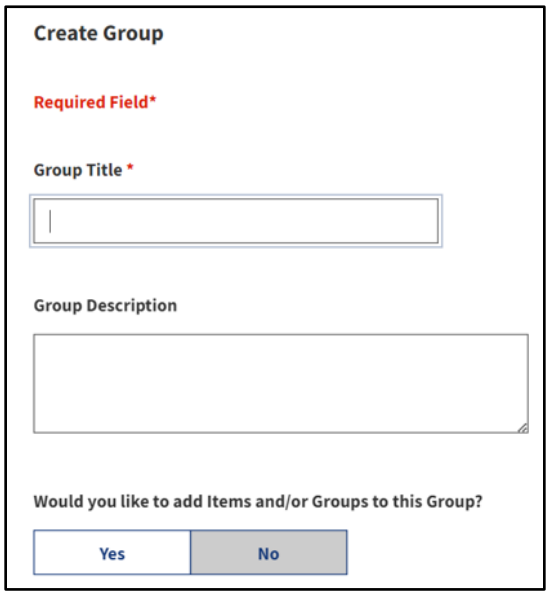

Figure 3 Create Group Tab

2. Enter the ***Group Title*** and ***Group Description*** in their corresponding text-entry fields.
3. Click ***Yes*** or ***No*** to the question: **Would you like to add Items and/or Groups to this Group?**
4. If **No**, select ***Next***. The **Attachments** tab displays.
5. If **Yes**, the **Select Items and Groups** menu appears.

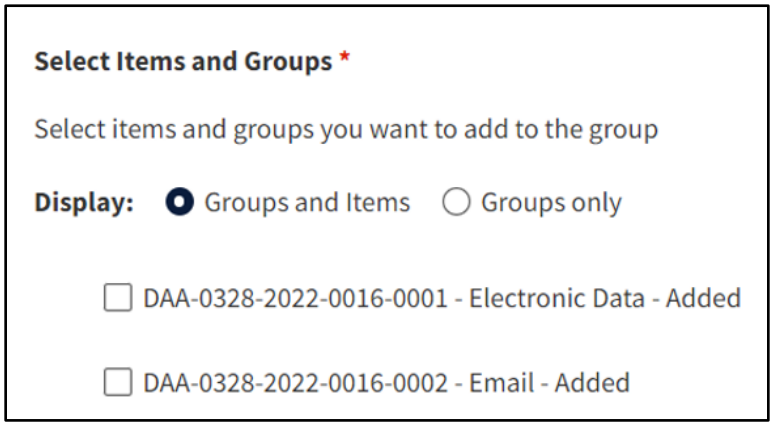

Figure 4 Select Items and Groups Feature

If you selected **Yes**,

1. Select either ***Groups and Items*** or ***Groups Only***.
2. Select the ***checkbox*** next to the items and/or groups you want to add to the Group.
3. Select ***Create Group***. The **Items** tab displays and the following message should appear: **The Group has been successfully created.**
4. Select ***Next***. The **Attachments** tab displays.

If you select ***Create Group*** and ***Add Another***, you will remain on the **Create Group** tab.

The confirmation message will display at the top of the tab. Enter information for additional groups according to the steps above.