ERA 2.0 Creating and Adding Items to Groups Guide

April 2023, Cycle K

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Group and Item Sorting

Instructions for creating Groups and Items may be found in the Agency User Manual. However, there are some peculiarities in sorting and repositioning Items and Groups that may slow down the process of creating multiple Groups and adding Items to Groups. This Job Aid will provide information about sort order within Records Schedules, and how Items and Groups may be most efficiently added and reordered.
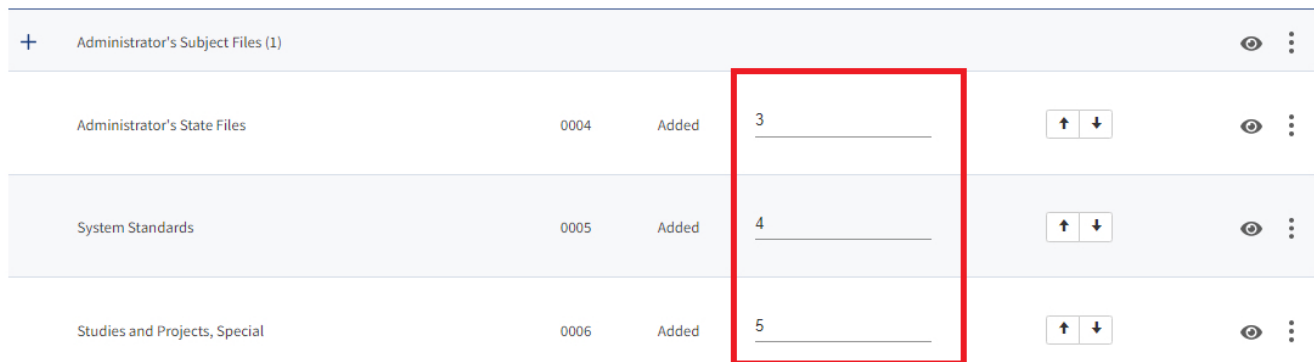
Creating Items

Items will sort in the order that they are created, unless they are intentionally repositioned. They may be moved into a Group in one of three ways: by using the Position renumbering option to move the Item into a Group; using the "Up" and "Down" arrows to reposition the Items in (and out) of Groups, and by using the Create or Modify Group form to add Items to Groups.

Renumbering the Position of Items

Items may be repositioned by entering a new number in the numerical Position field. In the screenshot below, overwriting Position 5 with the number 3 would move the bottom Item into the third position. The Item currently numbered 3 would become 4, and the Item numbered 4 would become 5.

To move the Item into the Group, the Position should be changed to 1 or 2 (the Positions of Items within the Group).

Using the "Up" and "Down" Arrows

Items may also be repositioned using the "Up" and "Down" arrows. "Up" will move the Item up one position, and "Down" will move the Item down one position. Once an Item is adjacent to a Group, the "Up" and "Down" arrows may be used to move that Item into the Group. In the screenshot below, the "Up" arrow would move Item 3 into the Group above it.

Using Create or Modify Group

Items may also be added to a Group when the Group is created or Modified. The "Create New Group' page is accessed by clicking the "Create New Group" button at the top left side of the Items page. "Modify Group" is accessed by clicking the "eye" icon to the right of an existing Group.

The method for adding and removing Items from Groups is the same on both the "Create New Group" and "Modify Group" pages.

Scroll to the bottom of the page, where you will see the question "Would you like to add or remove items and/or groups to this group?" Click Yes.

Once you choose 'Yes," you will be able to select and deselect Items and Groups to add to your Group.

Would you like to add or remove items and/or groups to this group?

Yes	No

Select Items and Groups

Please note that if an item or group is added or removed the current item positions may be shifted.

Display: ● Groups and Items ○ Groups only

- ☑ Administrator's Subject Files (1)
  - ☑ DAA-0016-2023-0025-0002 - Program Subjects - Added
  - ☑ DAA-0016-2023-0025-0003 - Administrative Subjects - Added
  - ☐ DAA-0016-2023-0025-0004 - Administrator's State Files - Added
  - ☐ DAA-0016-2023-0025-0005 - System Standards - Added
  - ☐ DAA-0016-2023-0025-0006 - Studies and Projects, Special - Added
- ☐ Working Papers (2)
  - ☐ DAA-0016-2023-0025-0007 - Working Papers (a) - Added
  - ☐ DAA-0016-2023-0025-0008 - Working Papers (b) - Added
- ☐ General Files (3)
  - ☐ DAA-0016-2023-0025-0009 - General Files (a) - Added
  - ☐ DAA-0016-2023-0025-0010 - General Files (b) - Added
  - ☐ DAA-0016-2023-0025-0011 - General Files (c) - Added
  - ☐ DAA-0016-2023-0025-0012 - General Files (d) - Added
  - ☐ DAA-0016-2023-0025-0013 - Borrower's Timber Products Inspection Reports - Added
- ☐ Financial Operations (Loans Receivable) (4)

Creating Groups

Groups will sort in the order that you created them, above any Items, until you begin adding Items to Groups. Once you begin adding Items to the Group, they will sort to the position that the Items within them occupy.

For example, in the screenshot below, the Groups were created first. The number in parentheses at the end of the Group title (1, 2, etc.) indicates the order in which they were created. The Items were created next.

Two Items from the top of the Items list (Positions 1 and 2) were entered into the first Group, "Administrator's Subject Files (1)." That group sorted to the bottom of the Group list, and the top of the Items list. (The Items are not visible in the screenshot because the Group is collapsed. To view Items within a group, click on the + to expand the Group.)

Then, two Items from the bottom of the Items list (Positions 6 and 7) were added to the second Group, "Working Papers (2)." The second Group then sorted to the bottom of the Items list.

The next step in this schedule would be to add the Items that will come after Group 2. Once the Items for Group 3 have been created, they may be added to Group 3, which will then sort to the position of those Items. Continue until all Items have been created and are in the appropriate Group.

The example screenshot below shows a total of four Groups, all containing Items, with Items interspersed between the Groups.

For schedules with small numbers of Items in each Group, there is not a preferred workflow. You can create all of your Groups first, then all of your Items, and add Items using the "Modify Group" page. You can create your Items first, and then use "Create New Group" to create a Group and add Items. If you need to sort within a Group, you can use the Position number or "Up" and "Down" arrows to reposition.

Creating and Editing Groups with Large Numbers of Items

If you are planning to assign large numbers of Items to the Groups, you may have problems with using the Create New Group / Modify Group forms to move all of the Items into the Group at once. There is an intermittent problem that may cause only some of the Items to be moved into a Group. For example, if you select 14+ Items to move into a Group, it's possible that only 13 Items will actually move. You may also see an error message. If you see an error, close out of the Group and return to the summary page. Then, if you still want to add Items, reopen the Modify Group page to add the rest.

In addition to receiving errors while moving large numbers of Items, if your attempt to add Items to a Group is successful, you might also encounter issues with the positioning of Items. Sometimes the Items are moved into the Group in a new order, which will require you to use the Position numbering or "Up"

and "Down" arrows within the Group. The Group will collapse every time you move an Item, so you will have to expand the Group multiple times if you want to move more than one Item.

Because Groups will sort to the position of the first Item within a Group, the easiest method for moving large numbers of Items into Groups, in order, is to use Create New Group or Modify Group to enter only the first Item into the Group. Your Group will sort to the position of that Item in the Item List, and you can use the "Up" arrow to add the rest of the Items.

There are several options for adding Items to Groups. If you will not have Items in-between (and outside of) your Groups, the easiest method to ensure proper sort order is to add one Group and its Items at a time.

If you will not have Items in-between Groups

Create your first Group, and then create all of the Items for the Group. Your Group will sort above your Items, and your Items should sort in the order that they were created.

If your Items are not in the order that you wish to see inside the Group, sort the Items so that your first Item is at the top of the list, your second choice is listed second, and so on.

For the first Group, you can exclusively use the "Up" arrow to move the Items, because the Group will already have sorted directly above your Items. After you move your first Item with the "Up" arrow, the page will reload and your second Item will now be at the top of the list. Move it into the Group using the "Up" arrow. Repeat this process until all of the Items are inside the Group. You can check the sort order by clicking the + sign, which will expand the Group.

Title	Item #	Status	Position	Move		
＋ Program Accounting Services Division (DRCS)					👁	⋮
Loan Contracts and Mortgages	0001	Added	1	↑ ↓	👁	⋮
Audit Reports	0002	Added	2	↑ ↓	👁	⋮
Audit	0003	Added	3	↑ ↓	👁	⋮
Financial Operations	0004	Added	4	↑ ↓	👁	⋮

If you need to reorder further, you can use either the "Up" and "Down" arrows, or reorder by changing the Position number. Please note that clicking "Up" on the top Item will move it out of/above the Group. Clicking "Down" on the last item will move it out of/below the Group.

Once you have moved all of your Items into the first Group, create your second Group. It will sort to the top of the page, above Group 1. This is temporary – once you add Items, it will appear below your first Group.

Create all of the Items that you want to move into your second Group. Sort them so that the first Item in the new group is at the top, the second Item is in the second position, and so on.

Once your Items are in order, click on the "eye" icon to the right of the second Group.

This will open the Group for editing. Scroll down to the question 'Would you like to add or remove items and/or groups to this group?' and select 'Yes.' Then, add the first Item – the one that you want to be first in the sort order within the group.

Select Items and Groups

Please note that if an item or group is added or removed the current item positions may be shifted.

Display: ⦿ Groups and Items ◯ Groups only

☑ Program Development & Regulatory Analysis (PDRA)

⌄ ☐ Program Accounting Services Division (DRCS)

☐ DAA-0016-2023-0022-0001 - Loan Contracts and Mortgages - Added

☐ DAA-0016-2023-0022-0002 - Audit Reports - Added

☐ DAA-0016-2023-0022-0003 - Audit - Added

☐ DAA-0016-2023-0022-0004 - Financial Operations - Added

☑ DAA-0016-2023-0022-0005 - Regulatory and Guidance Materials - Added

☐ DAA-0016-2023-0022-0006 - Information Collection Packages - Added

You may choose to add more than one Item, but there is a known issue in the system that may cause your Items to be added out of order. Once a large number of Items are present in a group, it can be tedious to reorder them using numbering or arrows. The Group will collapse every time you move an Item within it, so you are adding at least one extra click for every Item you must reposition within a Group. Adding only the first Item will re-sort the Group just above the Items, and then you can use the "Up" arrow to move Items into the Group while maintaining their order.

Once you have selected your first Item, save the changes to the Group. The page will reload to the Items screen.
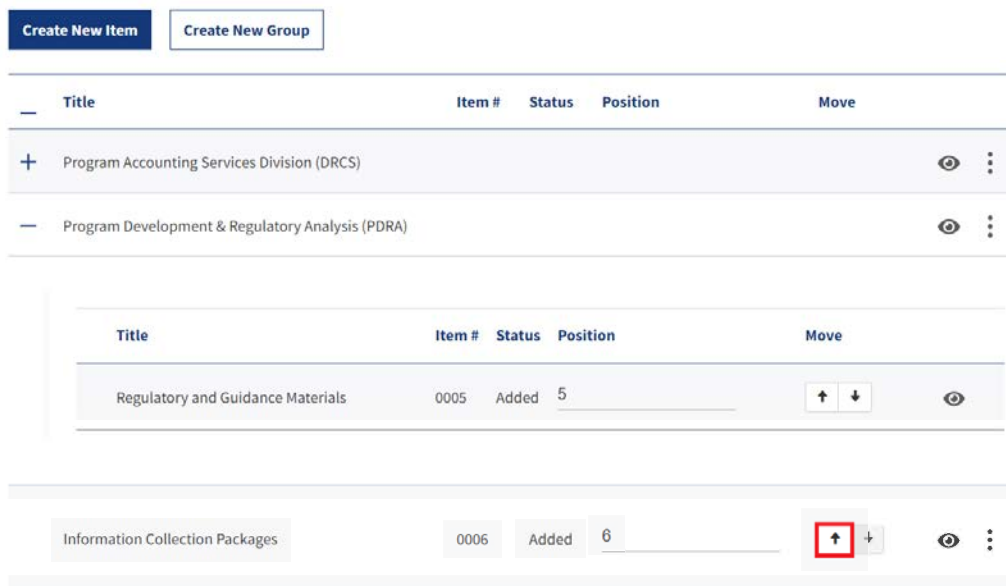
Note that, in the image above, the Groups have reordered themselves so that the second Group is now displayed second in the list.

Use the "Up" arrow to add the remaining Items to the Group, one at a time. Move the top Item first, then the next. This should preserve the sort order as the Items are moved up and into the Group. The page will reload each time, but you will not have to expand the Group to continue moving Items using the "Up" arrow.

Once you have added all of the Items for the second Group, you can repeat the instructions used to create Group 2 if you need a Group 3. New Groups will sort to the top, but as you add Items, the Groups will re-sort to the position of the Items within them.

Repeat until all of your Groups and Items are created.

If you will have Items in-between Groups

If you will have Items in-between Groups, there are several approaches for positioning the Items and Groups.

Create the in-between Items at the same time as the Items for a lower Group

If you know before creating your Records Schedule that you will need to position Items between Groups, create those Items at the same time that you create the Items for the Group. For example, in the screenshot below, the three Items between the Groups ("Administrator's State Files," "System Standards," and "Studies and Projects, Special") were created at the same time as the Items in the "Working Papers (2)" Group ("Working Papers (a)" and "Working Papers (b)").

	Title	Item #	Status	Position	Move		
+	Administrator's Subject Files (1)					👁	⋮
	Administrator's State Files	0004	Added	3	↑ ↓	👁	⋮
	System Standards	0005	Added	4	↑ ↓	👁	⋮
	Studies and Projects, Special	0006	Added	5	↑ ↓	👁	⋮
−	Working Papers (2)					👁	⋮

Title	Item #	Status	Position	Move	
Working Papers (a)	0007	Added	6	↑ ↓	👁
Working Papers (b)	0008	Added	7	↑ ↓	👁

Once the Items were created, the appropriate Items were added to the "Working Papers (2)" Group. The Group sorted to the position of the first Item, Position 6, which was below the three Items that should be positioned between the Groups.

Moving Items with the "Up" and "Down" arrows

If, during the course of creating Groups, you add an Item that you later decide to reposition outside of a Group, you may position the Item at the top of a Group (if moving above a Group) or at the bottom of a Group (if moving below a Group). Then, reposition the Item outside the Group using the "Up" and "Down" arrows.

For example, if you have an Item that you want to move above a Group, reposition the Item to the top of that Group. The easiest way to do this is to expand the Group and look at the relevant Position number at the top of the Group. In the screenshot below, the top Position number in the second Group

is 3. Change the Position number of your Item to the top Position number. The page should reload and your Item should move to the top of the Group.

Once your Item is at the top of the second Group, use the "Up" arrow to move it out of the bottom Group and into the space between the Groups.

Title	Item #	Status	Position	Move

Program Development & Regulatory Analysis (PDRA)

Program Accounting Services Division (DRCS)

Title	Item #	Status	Position	Move
Loan Contracts and Mortgages	0001	Added	3	↑ ↓
Audit Reports	0002	Added	4	↑ ↓
Audit	0003	Added	5	↑ ↓
Financial Operations	0004	Added	6	↑ ↓

Your Item should retain its numerical position, but will move so that it is not in either Group.

Items

Create New Item   Create New Group

Title	Item #	Status	Position	Move
Program Development & Regulatory Analysis (PDRA)				
Loan Contracts and Mortgages	0001	Added	3	↑ ↓
Program Accounting Services Division (DRCS)				

View 10 ⬍ Items of 3   Previous   1   Next

Items may also be moved from the bottom position in the Group to a position below the Group by using the "Down" arrow.