Mariner Software

How do I add characters to a Group or SmartGroup?

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Groups are ad-hoc collections of characters. Characters can be assigned to Groups much the same way that files are added to a folder in either Finder (on a Mac) or Windows Explorer (on a PC): just drag the name of the character from the CHARACTERS list (in the Source List) and drop it onto the desired Group.

SmartGroups are saved searches; they automatically display characters that match search criteria specified in the SmartGroup's configuration screen.

This knowledge base article describes processes to add a character either to a Group or a SmartGroup.

Add a character to a Group

Applies to: *Persona for Windows, Persona for Mac*

To add a character to a Group, drag the name of the character from the CHARACTERS list (in the Source List) and drop it onto the desired Group. The character will now appear as a member of the group.

Add a character to a SmartGroup

Applies to: *Persona for Windows, Persona for Mac*

A character displays as part of a SmartGroup when details provided for the character match search criteria specified for the SmartGroup.

There are two ways a character can be "added" to a smart group, by making sure that the character's details match the criteria specified for the SmartGroup:

- Modify the character, so that the character's criteria matches the criteria specified for the group.

- Modify the group, so that criteria for the group include the character to be "added" to the group.

Method 1: Modify the Character, to match criteria for the group

If a character does not already appear as a member of a SmartGroup, it should be possible to make changes to the character, so that details provided for the character match criteria specified for the SmartGroup.

Once details provided for the character match criteria specified for the SmartGroup, the character should appear as a member of the SmartGroup.

Method 2: Modify SmartGroup criteria, so that existing characters match the SmartGroup

If a character does not already appear as a member of a SmartGroup, it should be possible to make changes to the SmartGroup, so that the criteria specified for the SmartGroup match details provided for the character.

It should be possible to make changes to criteria provided for a SmartGroup by following these steps:

1. Select the SmartGroup to view details for.

2. From the Actions button (the button with the gear logo) in the lower left-hand corner of the main project window, select **Edit Selected SmartGroup**.