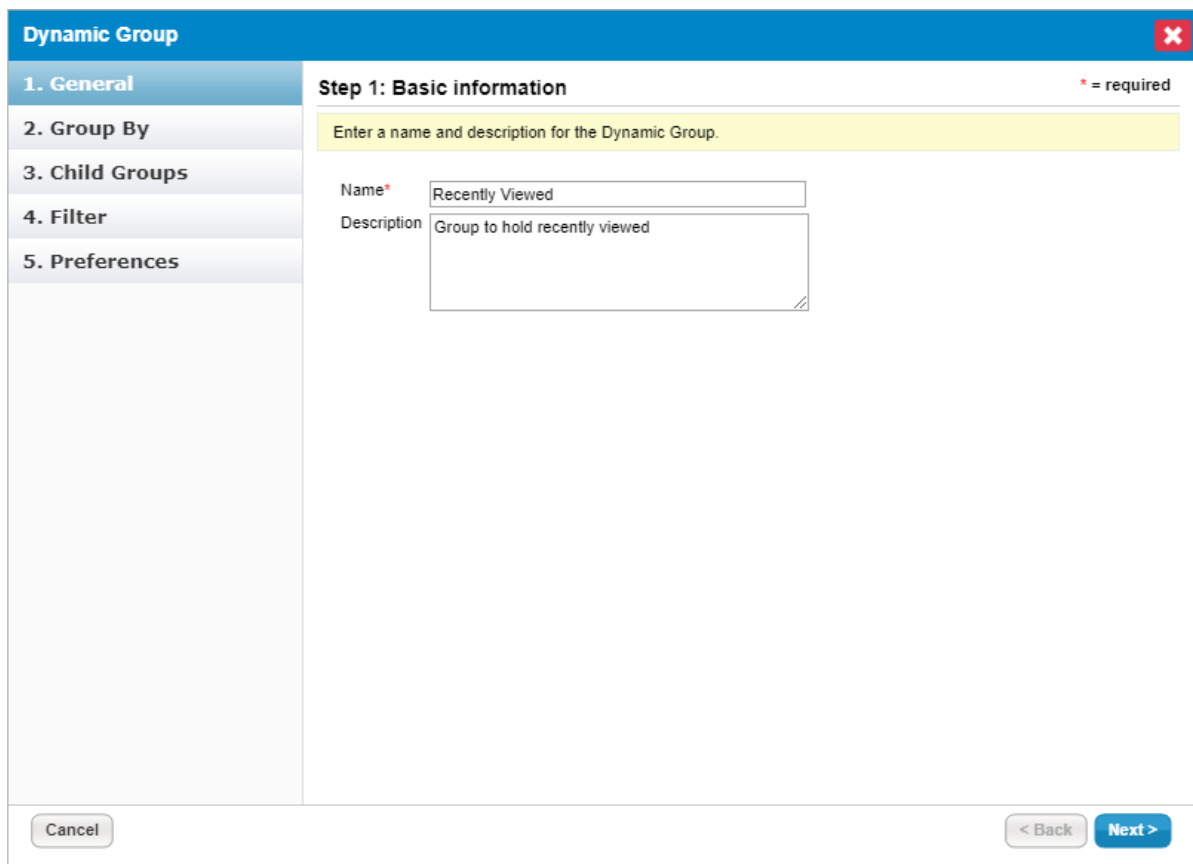


## Configure Dynamic Group Folders

Modifications to an existing folder take effect immediately. When a group or child folder is part of an assessment, the newly matching entities are automatically added to the assessment. If the modification removes entities from the group or child folder, the assessments for the entities are automatically removed from the program. In order to modify an existing dynamic group or create a dynamic group, you must have Entity View and Entity Manage permissions.

### To modify an existing group:

1. Go to **Entities > Group Definitions**.
2. Click the group, then click **Edit** to open the **Dynamic Group** wizard.
3. Enter a [Name and Description](#) .



The screenshot shows the 'Dynamic Group' wizard interface. The title bar is blue with the text 'Dynamic Group' and a close button. A sidebar on the left contains five menu items: '1. General', '2. Group By', '3. Child Groups', '4. Filter', and '5. Preferences'. The main content area is titled 'Step 1: Basic information' and includes a yellow instruction bar: 'Enter a name and description for the Dynamic Group.' Below this, there are two input fields: 'Name\*' with the value 'Recently Viewed' and 'Description' with the value 'Group to hold recently viewed'. A legend indicates '\* = required'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

*Step 1 of the Dynamic Group wizard.*

4. Click **Next**.
5. **Optional:** Configure the dynamic group settings:
  - To group applications by flags, click the **Application System Flags** and **Internet Facing** checkboxes.
  - To group entities by an attributes, select the options from the [Grouping Entities](#) table.
  - To group computer and network devices, select the options from the [Grouping Computer and Network Device table](#) .

- If you skip this option, the folder will display a list of the entities that match the filters.

**Dynamic Group** [Close]

**1. General**

**2. Group By**

**3. Child Groups**

**4. Filter**

**5. Preferences**

**Step 2: Select the attribute from which dynamic groups are created (Optional)** \* = required

Dynamic groups can optionally be configured to automatically group matching entities. For example if you are creating a Dynamic Group to show Computers, then you can select to group the matching entities by Operating System.

Group By Category: Computer Network

Group By: Subnet

Cancel < Back Next >

*Step 2 of the Dynamic Group wizard.*

6. Click **Next**.
7. Enter a name that's similar to the value of the attribute that you want to match, then click **Add**.

The child folder will appear in the **Entity** and **Program Wizard Entity** selection trees. RiskVision sorts entities with a matching attribute value into the appropriate folder and allows prepopulation of values during entity creation for organizations. For example, if you create a Division child folder called Engineering, the Engineering folder displays on the Organization page of the Entity Wizard. When it is selected, the Entity Organization/Division is automatically set to Engineering.

**Dynamic Group**
✕

<b>1. General</b>	<div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4;"> <p><b>Step 3: Add subfolders (Optional)</b> <span style="float: right;">* = required</span></p> <p>Child Folders for a dynamic group are calculated dynamically by the RiskVision system. For example, if you selected the option to group by Computer System OS, then folders like Linux and Windows will be created for you based on operating systems currently assigned to entities. This wizard step allows you to specify fixed child folders. These fixed child folders will be presented to your users even if no entities match the condition to populate this group.</p> </div> <div style="margin-top: 20px;"> <p><b>Create a child folder</b></p> <p>Name <input style="width: 80px;" type="text"/> <input style="margin-left: 10px;" type="button" value="Add"/></p> </div> <div style="margin-top: 20px;"> <p><b>Child Folders</b></p> <p style="text-align: center;"><b>Name</b></p> <hr style="border: 0.5px solid #ccc;"/> <div style="border: 1px solid #ccc; background-color: #e1f5fe; padding: 5px; text-align: center; margin: 5px auto; width: fit-content;"> <span style="color: #0070c0; font-weight: bold; font-size: 0.8em;">i</span> No folders have been created         </div> </div>
<b>2. Group By</b>	
<b>3. Child Groups</b>	
<b>4. Filter</b>	
<b>5. Preferences</b>	

*Step 3 of the Dynamic Group wizard.*

8. Click **Next**.
  
9. Select a filter to limit the entities grouped or listed. You can select one filter. To use the Match Filter option to combine multiple filters, see [Configuring filters](#) .

### Dynamic Group ✕

- 1. General
- 2. Group By
- 3. Child Groups
- 4. Filter**
- 5. Preferences

#### Step 4: Assign filters to the folder (Optional) \* = required

The set of entities that are displayed by a dynamic group can be further filtered. Select a RiskVision filter to filter the set of entities that are displayed for this group.

Available Filters [New Filter]

Filter

- My Filters
- Shared Filters

Selected Filter  
No filter selected

Cancel < Back Next >

*Step 4 of the Dynamic Group wizard.*

10. Click **Next**.
11. Select the folder and dynamic group settings, then click **Finish**.

### Dynamic Group ✕

- 1. General
- 2. Group By
- 3. Child Groups
- 4. Filter
- 5. Preferences**

#### Step 5: Select folder and dynamic group node options. \* = required

Here you can configure the display preferences for your group.

Show group hierarchy  Yes  No

Show this node in the hierarchy  Yes  No

Show child nodes with "unknown" value  Yes  No

Show child nodes with no value  Yes  No

Show individual entities as children of this node  Yes  No

Maximum number of children for this node

*Step 5 of the Dynamic Group wizard.*

The dynamic group folder displays in the list and entities matching the settings are dynamically grouped on the **Entities** page.