

# Create Resource Groups

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Resource groups consist of resources that belong to one or more regions and share one or more characteristics. Resource groups are created to serve as the data source when creating dashboard gadgets, and in this way, they allow you to generate a snapshot of information related to specific resources.

## Static and Dynamic Resource Groups

Resource groups are *static* or *dynamic*, which determines how the groups are structured and updated. Static resource groups consist of specific resources that do not change unless you edit the resource group. The resources in dynamic resource groups can vary depending on the region you log in to, and as such, are identified by the standard resource type or resource type. Also, dynamic resource groups are automatically updated when resources are added or removed from the selected resource type, regions, states, and/or counties. For more information, please see the article [About Resource Groups](#).

## Tab Selections

When creating resource groups, your selections on a tab are inclusive and selections on different tabs are exclusive. In other words, on a single tab, your selections are combined. Selecting two regions will include all resources or resource types from both regions. However, between tabs your selections reduce the available options or amount of data. So, in the given example where two regions are selected, your selection on the *Resources* or *Resource Types* tab will further limit the resource group.

As you progress through the options and selections on each tab, you decide which resources are included. At any time, you can click **Preview** to see a list of the resources currently selected in the group. In this wizard-like progress between tabs, clicking either **Next** or the name of a tab automatically saves your selections. Keep in mind, changes to your selections on prior tabs may affect your selections and options on subsequent tabs. After making any changes, it is recommended that you proceed through all subsequent tabs to review your selections.

### To create a static resource group

1. In the main menu, click **Setup** and then click **Resource Groups**. The *Resource Group List* page opens.
2. Click **Create Static Group**. The *Create Resource Group* page opens with the *General* tab active.
3. Enter this information.

Field	Description	Valid Values
<b>Name</b>	Label or title for this resource group.	--
<b>Sharing</b>	Rights to access and view the resource group.	<ul style="list-style-type: none"><li>• <b>Private</b></li><li>• <b>Shared</b></li></ul>

4. Click **Next** or click the **Regions** tab. The *Regions* tab opens.
5. Select the check box for one or more regions whose resources you want to include in this group.
6. Click **Next** or click the **Resources** tab. The *Resources* tab opens.
7. Select the check box for one or more resources you want to include in this group. As appropriate, use the available filters (*Selected/Not Selected, Regions, Resource Types, Standard Resource Types, State, County, Resource Name, or Address*) to limit results in the list of resources.
8. At the bottom of the page, click **Save**. The new resource group appears in the list.

### To create a dynamic resource group

1. In the main menu, click **Setup** and then click **Resource Groups**. The *Dashboard List* page opens.
2. Click **Create Dynamic Group**. The *Create Dynamic Resource Group* page opens with the *General* tab active.
3. Enter this information.

Field	Description	Valid Values
<b>Name</b>	Label or title for this resource group.	--

<b>Sharing</b>	Rights to access and view the resource group.	<ul style="list-style-type: none"> <li>• <b>Private</b></li> <li>• <b>Shared</b></li> </ul>
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4. Click **Next** or click the **Regions** tab. The *Regions* tab opens.
5. Select one of these options:
  - a. **Create a group that includes resources for whichever region you are logged in to. Resources in this group will change accordingly. With this option, only Standard Resource Types can be selected because Resource Types vary by region.**
  - b. **Select one or more regions whose resources you want to include in this group.**

**Note:** If you select this option, you must also select the individual regions in the list that you want to include.
6. Click **Next** or click the **Standard Resource Types** tab. The *Standard Resource Types* tab opens.
7. As appropriate, select the check box for one or more standard resource types.
 

**Note:** If you prefer to define the group by resource types, you do not need to select any standard resource types.
8. Click **Next** or click the **Resource Types** tab. The *Resource Types* tab opens.
9. Take one of these actions.

On the <i>Regions</i> tab, if you selected...	Then...
Create a group that includes resources for whichever region you are logged in to. Resources in this group will change accordingly. With this option, only Standard Resource Types can be selected because Resource Types vary by region.	No resource types will be available. Continue to the next step.
Select one or more regions whose resources you want to include in this group.	As appropriate, select the check box for one or more resource types. If you prefer to define the group by standard resource types, you may not want to and do not need to select any resource types.

10. Click **Next** or click the **States** tab. The *States* tab opens.
11. As appropriate, select the check box for one or more states to limit resources accordingly.
12. Click **Next** or click the **Counties** tab. The *Counties* tab opens.
13. As appropriate, select the check box for one or more counties to limit resources accordingly.
14. Click **Next** or click the **Preview** tab. The *Preview* tab opens. All resources that meet the criteria you specified on the preceding tabs are presented for review. Resources are listed in alphabetic order by name; however, you can reorder them by clicking any column header.
15. As appropriate, at the bottom of the page, click **Save** or click any preceding tab to review and revise selections on that tab.