Adding a New Hierarchy

You can create any number of new hierarchy trees with as many branches (or nodes) as needed. Within each hierarchy, you can add members (vehicles, drivers, landmarks, users) to the branches.

> **Note.** In order to create a new hierarchy tree, you must have the Hierarchy Admin permission enabled in the User Access List. To see all hierarchy trees for your account (including hierarchy trees that other users have created), you must have the All Hierarchies permission enabled. See Giving Hierarchy Admin Access to Users to learn more.

Add a New Hierarchy Tree

A hierarchy tree can be based of any logical purpose that makes sense to your company. Most companies create hierarchies based on geographical location, but other purposes might be to reflect an org chart with branches for the various departments, or to group vehicles based on type of fuel: Green (CNG, Electric, Hybrid) or Legacy (Gas, Diesel).

You can add a hierarchy manually, or you can import a hierarchy tree structure. The following steps are for adding a hierarchy manually.

> **E X A M P L E**
> Company XYZ has several dispatch facilities in Arizona and Minnesota. XYZ's owner wants to easily view maps for any of the facilities–such as all Arizona vehicles or only Phoenix vehicles. He also wants an easy way to run reports so that he include/exclude metro and rural locations as needed.
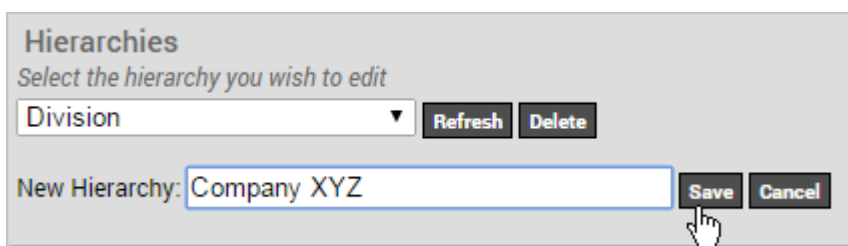
▶ **To add a new hierarchy tree:**

1. From the portal, hover over the **Account** menu, click **Manage Hierarchy**, and click **Open**.

   The Manage Hierarchies page opens in a new browser tab.

1. Click **+ Create a New Hierarchy Tree**.

2. In the **New Hierarchy** box, enter a hierarchy name, and click **Save**.
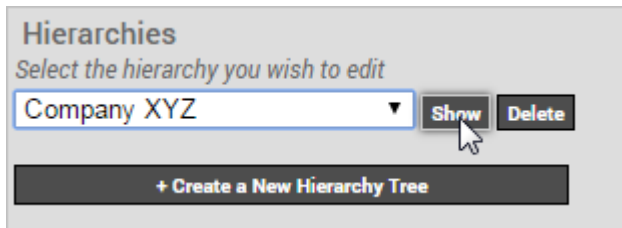
> **Note.** Hierarchy name is limited to 30 characters.

A message appears to indicate the hierarchy tree was successfully added.

1. If it's not already selected, choose the new hierarchy from the drop-down list, and click **Show**.

The Branches pane shows the hierarchy tree.

1. Right-click the tree, and click **New Branch**. Enter a name for the branch. In our example, we use "Arizona."

2. Right-click the top-level tree again (Company XYZ), and click **New Branch**. Enter a name for the branch. In our example, we use "Minnesota."

Now let's add multiple child branches at one time. In the Company XYZ example, we'll add all of the locations for Arizona facilities.

1. Right-click the appropriate sub-branch (Arizona), and click **Create Multiple Branches**.

2. In the Create Multiple Branches window, enter a list of branch names separated by a comma and/or a line break.

> **Note.** You can add multi-level branches at the same time using the instructions shown with Advanced input mode. The maximum number of parent nodes per branch is 62.

1. Click **Preview**.

A preview pane shows how the nodes will appear.

1. If you're satisfied with the preview, click **Add Branches**.

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1. Continue adding child branches until your hierarchy tree is complete.

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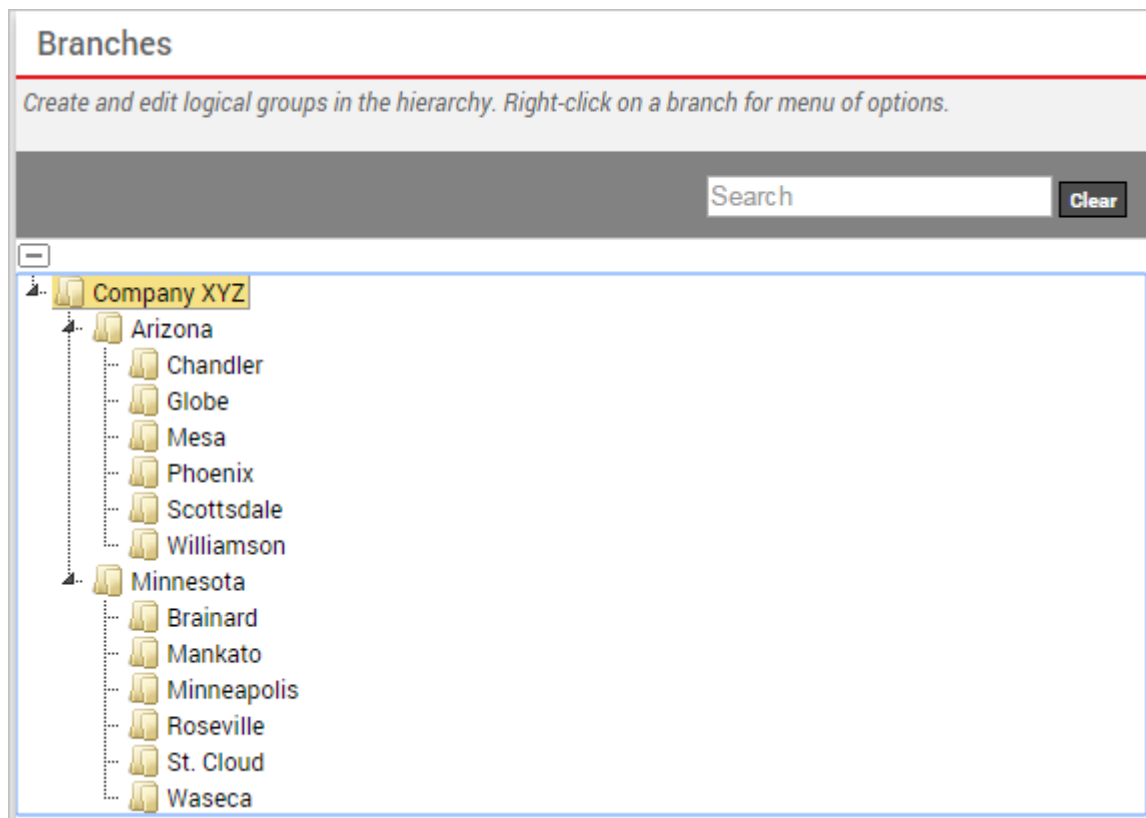
▶ **To add members to a hierarchy branch:**

1. Click a branch in the hierarchy tree to which you want to add members. In the Company XYZ example, we'll add vehicles to our Phoenix branch.
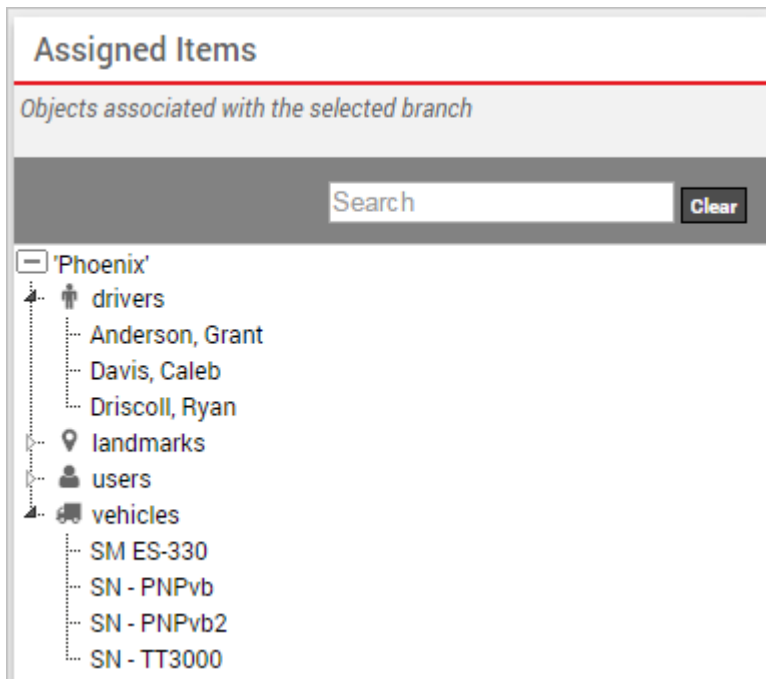
   The branch name appears in the Assigned Items pane.
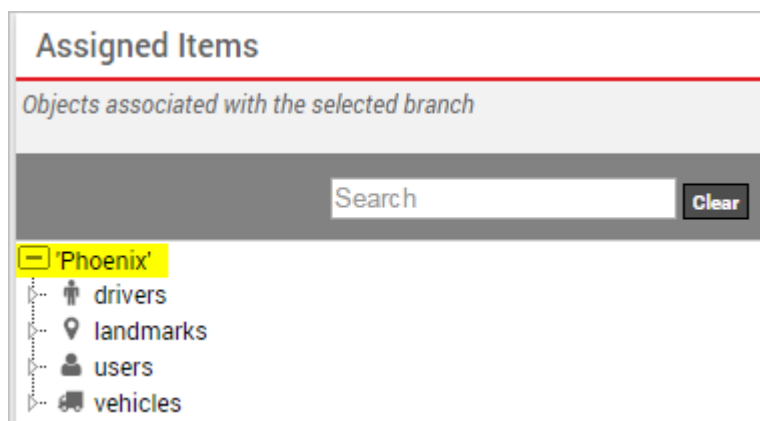
1. From the Unassigned Items pane, locate the items you want to add to the branch.

   You can filter by Vehicle Group, Landmark Group, or Driver Group. You can also use searches to narrow the selection. For example, to search for all items that have TR in their names, type "TR" in the Search box. Results filter as you type.

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1. CTRL + click or SHIFT + click to select the items you want to add, and click **Assign**. Alternatively, you can drag-and-drop the items to/from the Assigned Items pane. Also, you can select items from more than one types at a time. For example, you can CTRL+click to select drivers AND vehicles to/from the Unassigned Items pane.


The selected items appear under the appropriate branch(es) in the Assigned Items pane. They are no longer available from the Unassigned Items pane because you can only assign an item to one branch per hierarchy.

1. Continue adding members to the appropriate branches in the hierarchy tree (e.g., users and drivers).

> **Note.** You can also modify hierarchy membership using the Hierarchy List grid on the Manage Vehicles and Groups page or the Manage Drivers and Groups page.

When finished creating a hierarchy, users with access to the hierarchy can immediately apply it to an available report, map, or dashlet.

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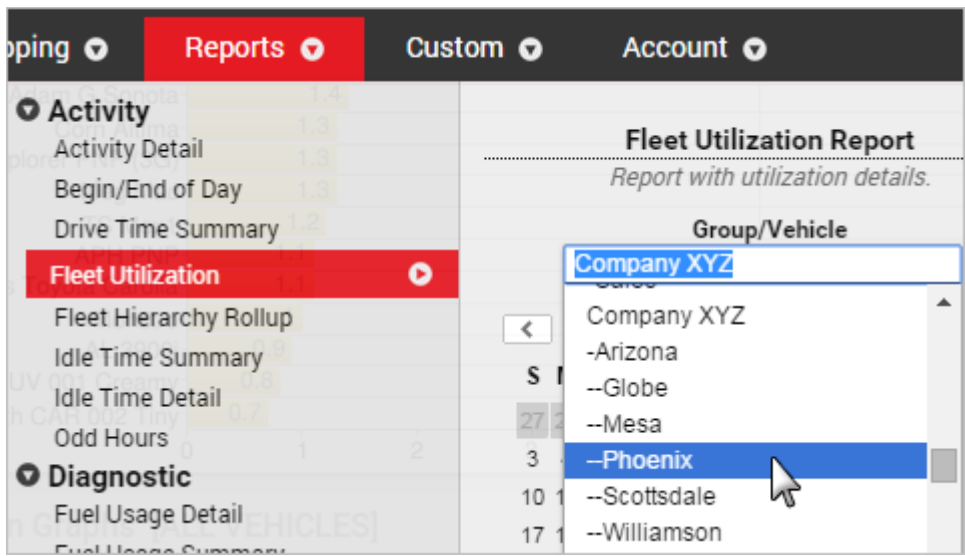
Hierarchy Maintenance

If a branch within a hierarchy is deleted, any assigned items will become unassigned. Periodically it is recommended that you check the unassigned items area and assign them to a hierarchy branch to ensure the hierarchy is up to date. See above steps for adding members to a branch.