Using Custom Report Groups



Link: https://help.gpsinsight.com/docs/about-hierarchies/using-a-hierarchy-in-a-map-or-report/ Last Updated: July 27th, 2016

Hierarchy report groups allow you to include, exclude, and intersect different branches from one or more hierarchies, which you can use to filter maps and report-for example, "All Public Works vehicles excluding Solid Waste, including Maintenance, and ONLY Ford models."

You can create hierarchy report groups on-the-fly when running maps and reports ("CREATE NEW CUSTOM SELECTION"), or you can save a few groups in advance so that they are ready for use at a later time.

EXAMPLE

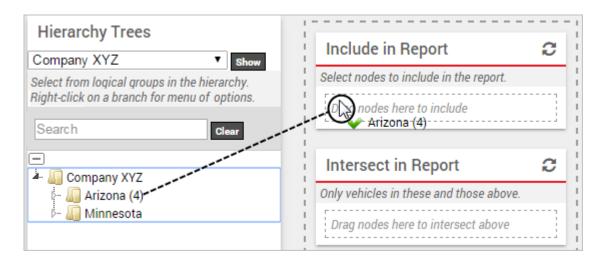
Company XYZ has several dispatch facilities in Arizona and Minnesota. XYZ's owner wants to run a report to view fleet usage for all Arizona vehicles (excluding rural locations) for Delivery vehicles only (not Service). This example requires two hierarchy trees-one created for geography (Arizona, Minnesota), and one created for function (Delivery, Service).

To create a hierarchy report group

1. From the portal, hover over the **Account** menu, click **Manage Hierarchy**, and click **Configure custom** hierarchy report groups.

The Hierarchy Report Group page opens in a new browser tab.

- 1. From the Hierarchy Trees pane, if the hierarchy you want is not already shown, click the drop-down to select the hierarchy tree you want to modify, and click **Show**.
- 2. Expand the hierarchy tree to expose the branches you want to target for this report group.
- 3. Drag the appropriate branches into the **Include in Report** box, and drop them when green check mark appears. In the Company XYZ example, we included the entire "Arizona" node.

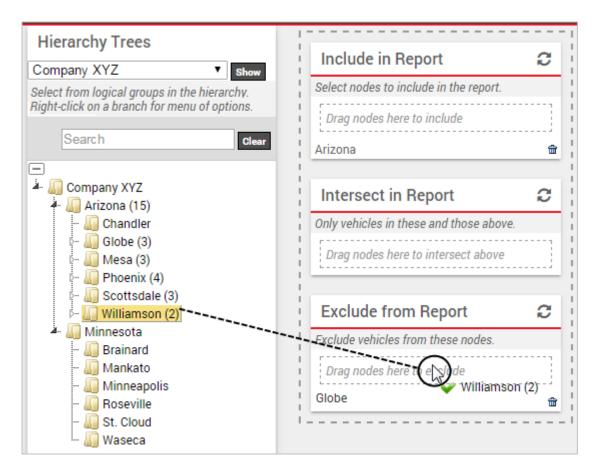


1. Drag the appropriate branches into the **Exclude from Report** box, and drop them when the green check mark appears. In the Company XYZ example, we want to exclude rural locations in Arizona such as "Globe" and "Williamson."

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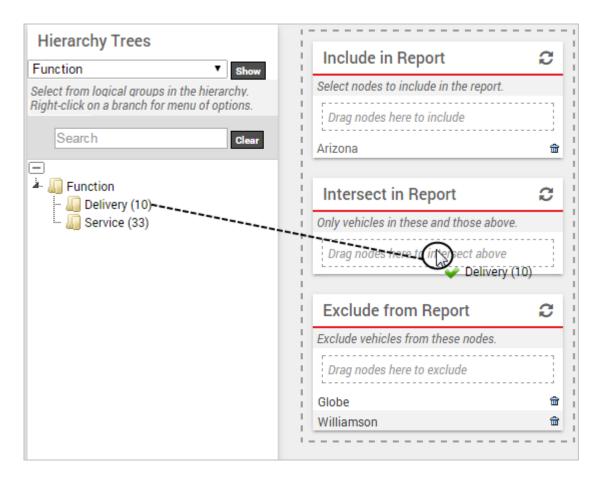


- 1. From the hierarchy drop-down list, choose a different hierarchy tree (e.g., Function), and click **Show**.
- 2. Expand the hierarchy tree to expose the branches you want to intersect.
- 3. Drag the appropriate branches into the **Intersection in Report** box, and drop them when the green check mark appears. In the Company XYZ example, we want to include only "Delivery" vehicles from the total selection.

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1. When finished modifying the details of the report group, enter a **Group Name**, and click **Save**.



The next time you view a map or run a report, this hierarchy group will be available to choose. In the Company XYZ example, the owner ran a fleet utilization report to show data for his Delivery vehicles in metro Arizona locations:

