

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

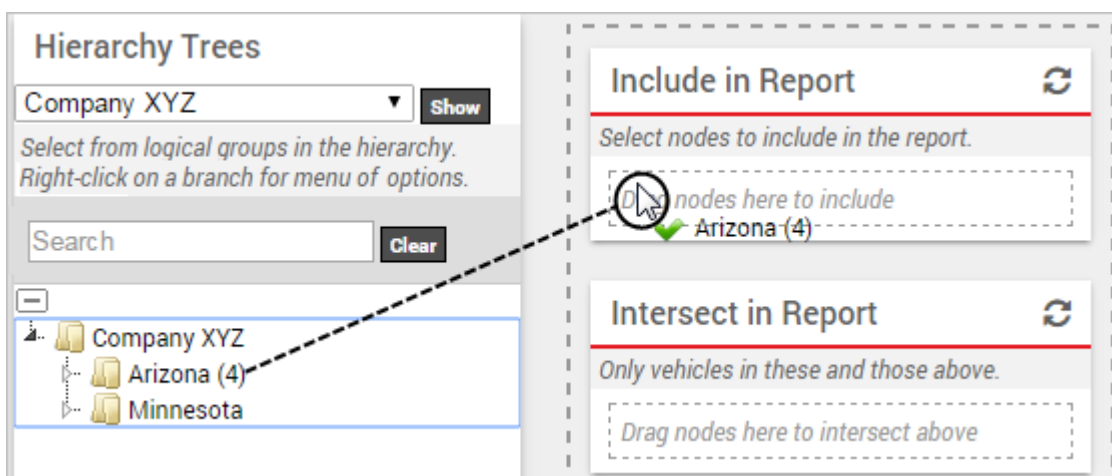
Company XYZ has several dispatch facilities in Arizona and Minnesota. XYZ’s owner wants to run a report to view fleet usage for all Arizona vehicles (excluding rural locations) for Delivery vehicles only (not Service). This example requires two hierarchy trees—one created for geography (Arizona, Minnesota),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

To create a hierarchy report group

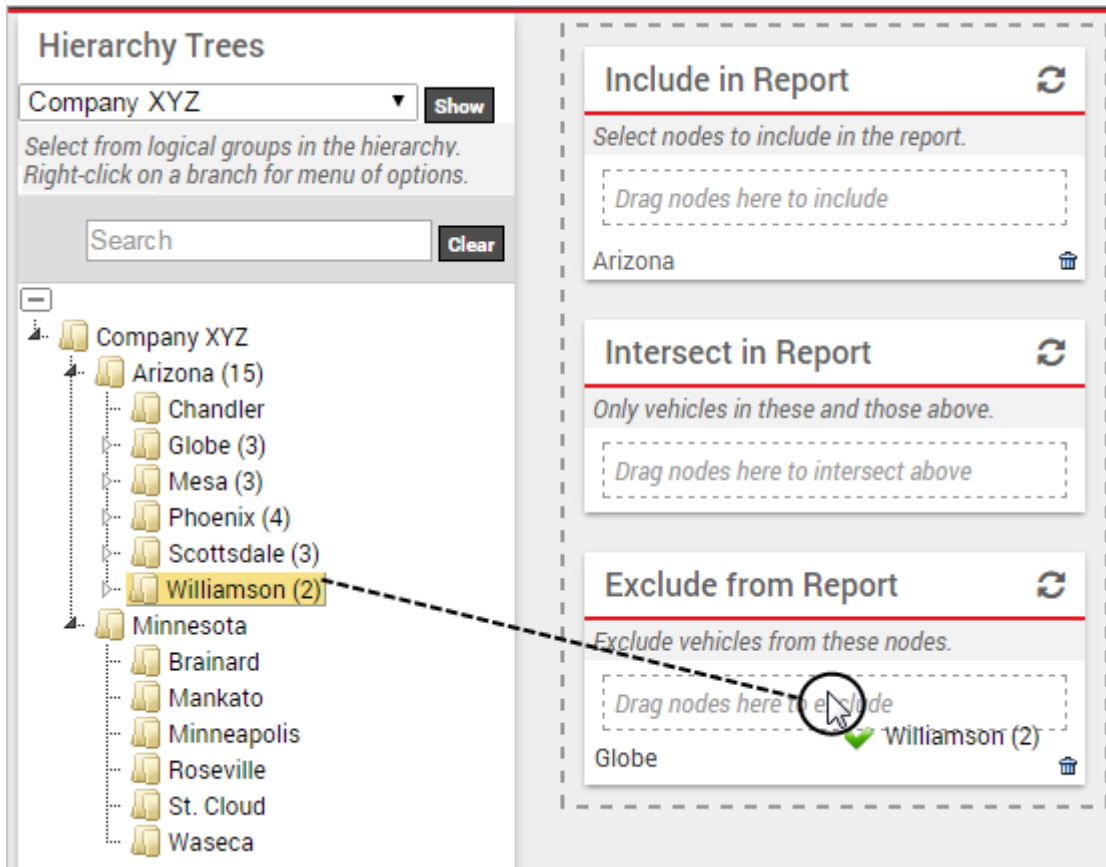
1. From the portal, hover over the **Account** menu, click **Manage Hierarchy**, and click **Configure custom hierarchy report groups**.

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

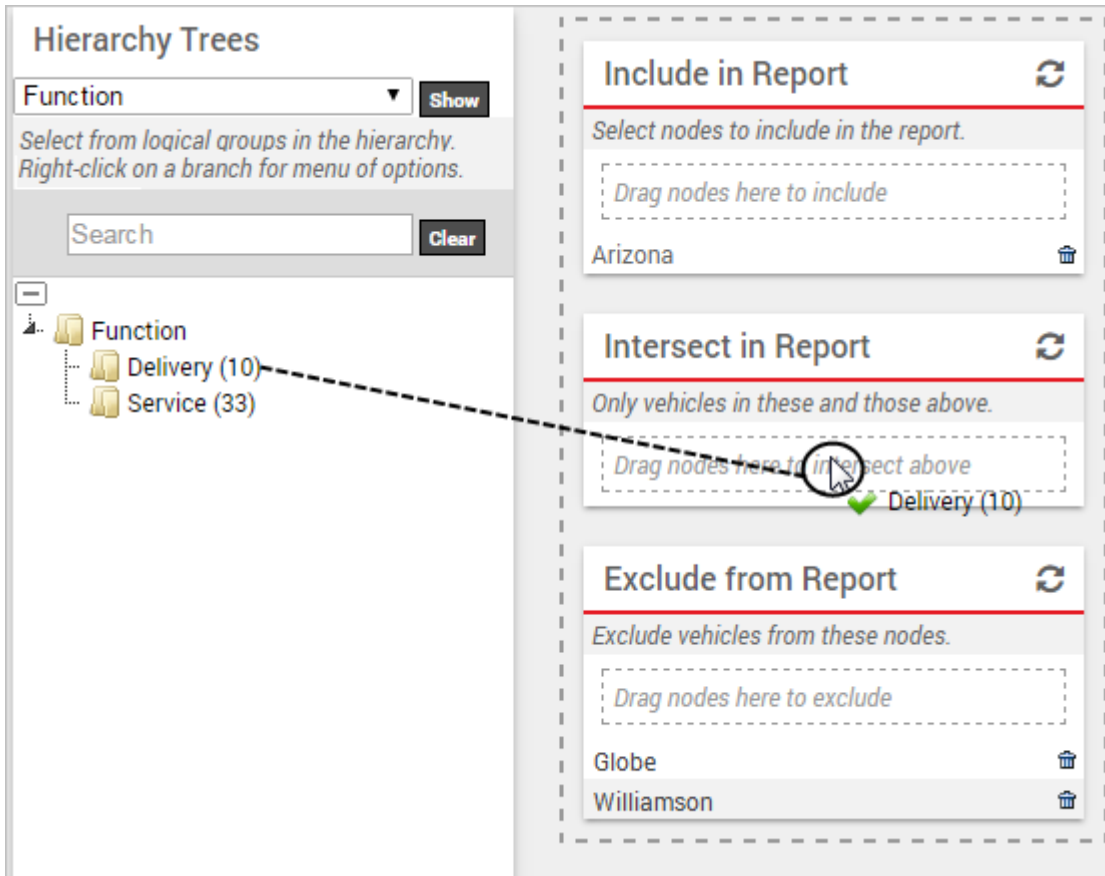
1. From the Hierarchy Trees pane, if the hierarchy you want is not already shown, click the drop-down to select the hierarchy tree you want to modify, and click **Show**.
2. Expand the hierarchy tree to expose the branches you want to target for this report group.
3. Drag the appropriate branches into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



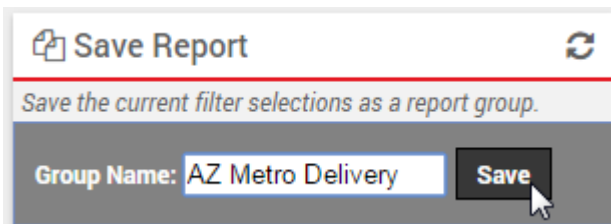
1. Drag the appropriate branches into the **Exclude from Report** box, and drop them when the green check mark appears. In the Company XYZ example, we want to exclude rural locations in Arizona such as “Globe” and “Williamson.”



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.



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:

