DIVISIONAL AND REGIONAL REPORTING

agrē allows you to define *Divisions* and *Regions* to summarize specific Location totals on reports. You can also define *Group* characteristics to combine totals from Locations that are in different divisions or regions.

> **Note**: Currently there are a limited number of reports that summarize data by *Regions*, *Divisions*, and *Groups*. Other GL and Inventory reports that take advantage of this feature will be deployed as they are updated.

Setting up *Regions*, *Divisions*, and *Groups* is completely optional. If reporting on single locations and/or the whole company is working for you, there is no requirement make any changes.
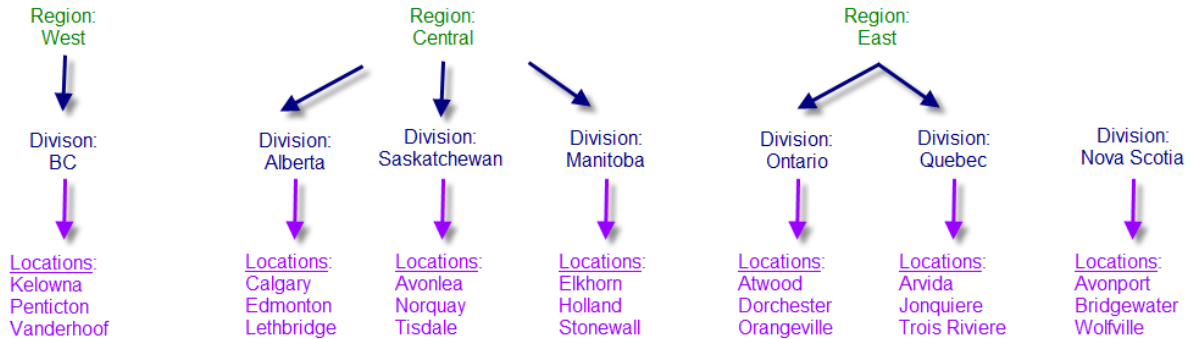
What you'll find:
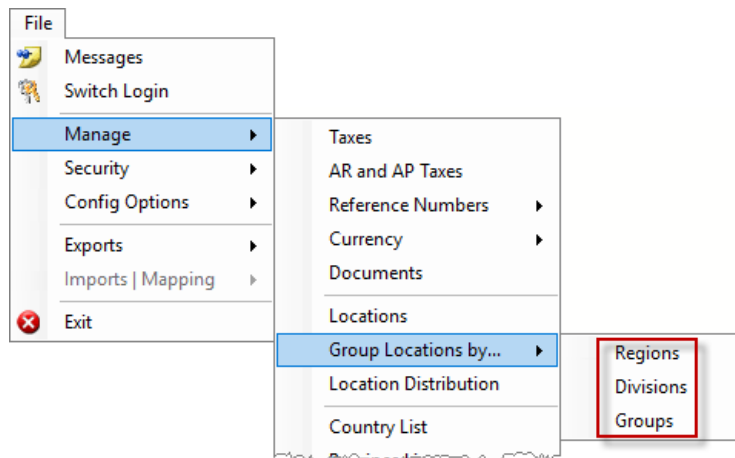
Regions, Divisions, and Locations

Hierarchy of Locations, Divisions and Regions

Locations belong to Divisions. Divisions *can* belong to Regions, but Regions are optional.

Defining Regions

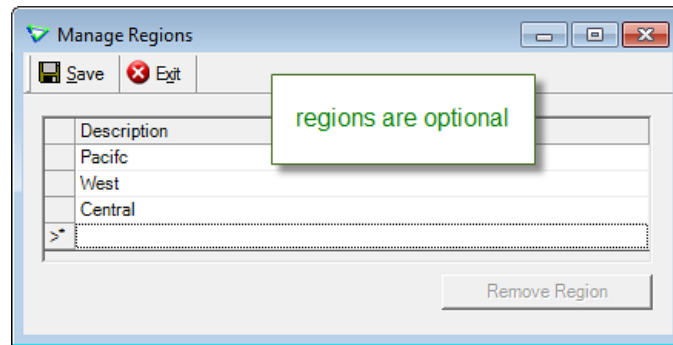You can summarize Division totals together in a Region if you'd like to, but Regions are not required.

To define a region:

Note	Regions are optional. You can create Divisions that do not belong to a Region.

1. Navigate to *File > Group Locations by … > Regions*.

2. Type the name of the *Region*. If you are adding more than one, press **TAB** to move down to the next line.
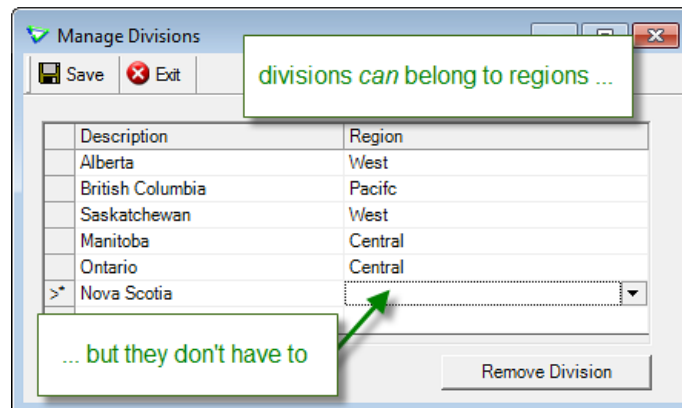

3. *Save* your changes

Defining Divisions

To summarize Location totals, you'll combine the locations together in a Division. You can then assign Divisions to a Region, but that step is optional.

To define a division:

1. Navigate to *File > Group Locations by … > Divisions*.

2. Type the name of the *Division* and optionally select the *Region* from the dropdown. If you are adding more than one, press **TAB** to move down to the next line

3. *Save* your changes

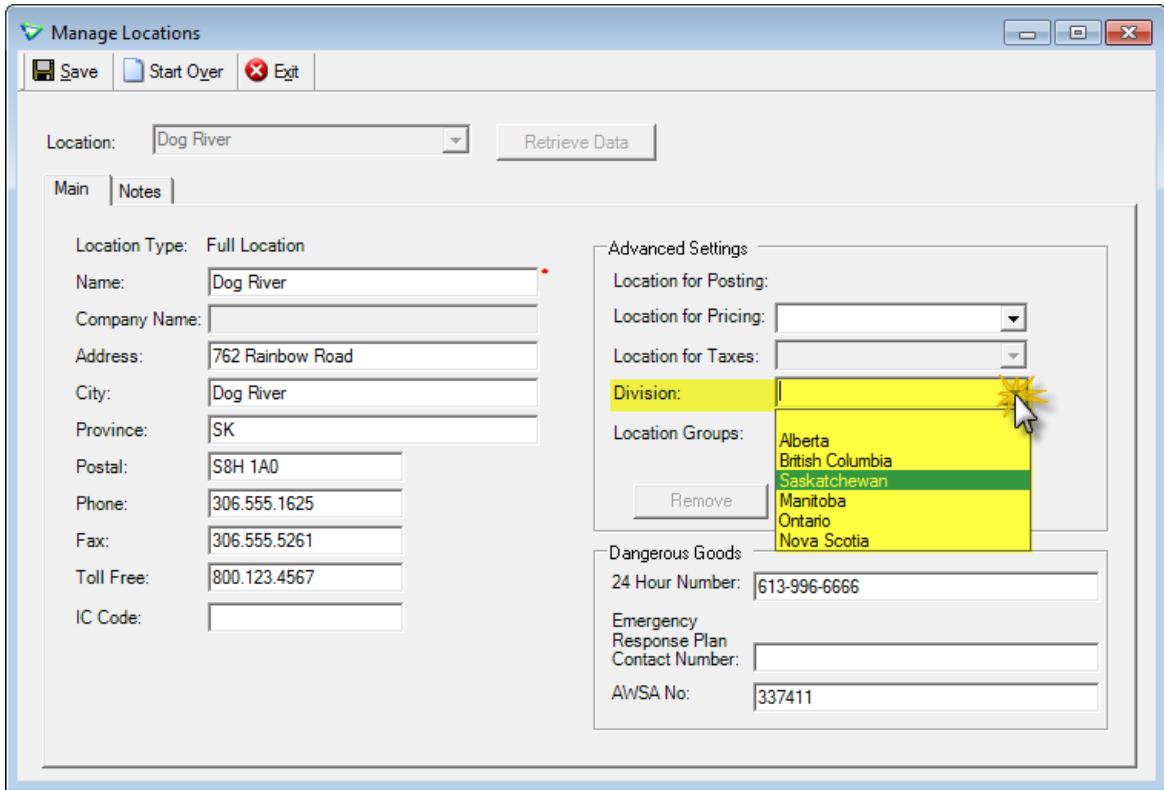# Assigning Locations to Divisions

Assign locations that you want grouped together to a Division.

To assign a location to a division:

1. Navigate to *File > Manage > Locations*.

2. Select the location and click *Retrieve Data*.

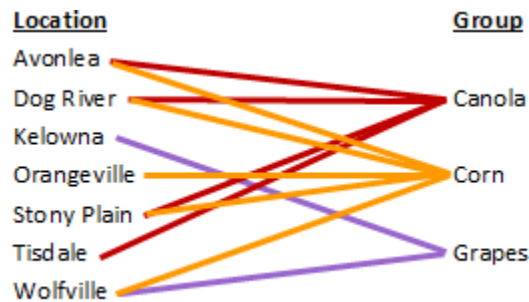3. On the *Main* tab, choose the *Division* from the dropdown menu.

4. *Save* your changes.

Groups

Groups are like characteristics for Locations. You assign Locations to Groups so that you will be able to summarize their results on Inventory reports. Groups are independent of Divisions and Regions.

Hierarchy of Groups

Groups are independent of Regions and Divisions. You can put any Location into any Group, and Locations can be members of multiple Groups.
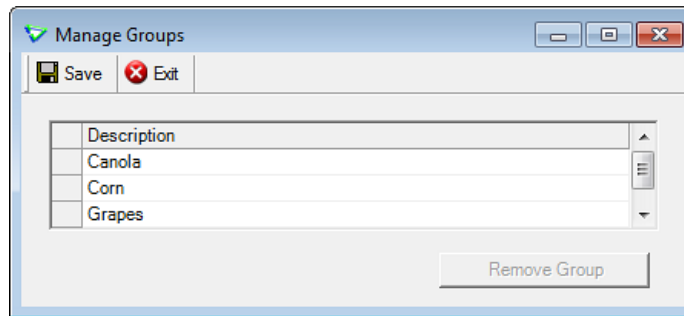
Defining Groups

Before you can assign a Location to a Group, you'll need to define the Group first.

To define a group:

1. Navigate to *File > Group by … > Groups*.

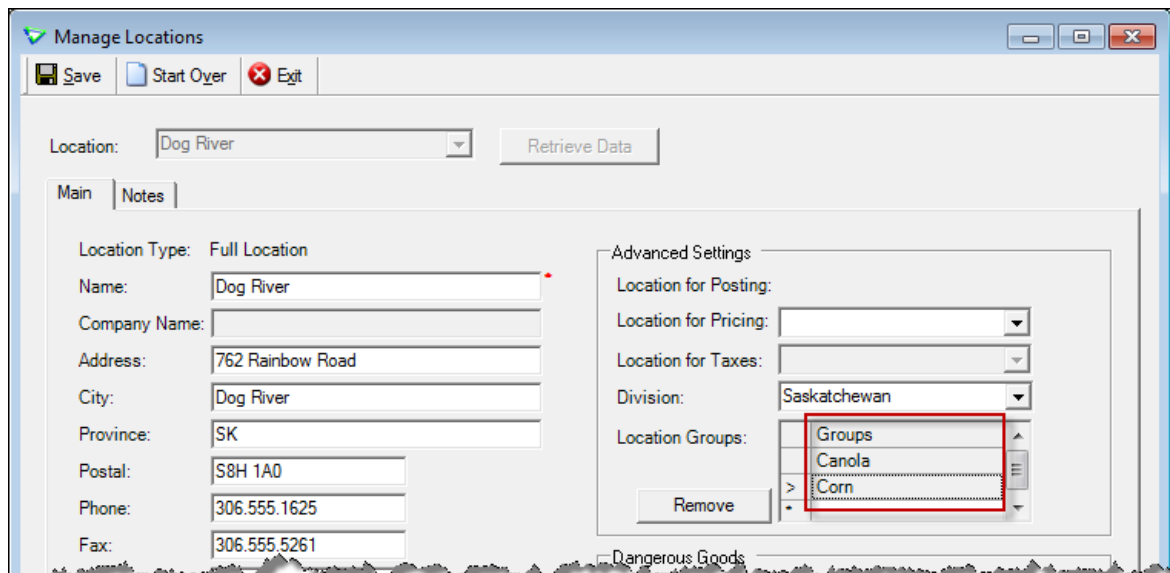2. Type the name of the Group. If you are adding more than one, press **TAB** to move down to the next line

3. *Save* your changes.

Assigning Locations to Groups

Locations are assigned to Groups individually.

To assign a location to a group

1. Navigate to *File > Manage > Locations*.

2. Select the location and click *Retrieve Data*.

3. On the *Main* tab, choose the *Location Group* from the dropdown menu. You can repeat this step to choose more than one group.
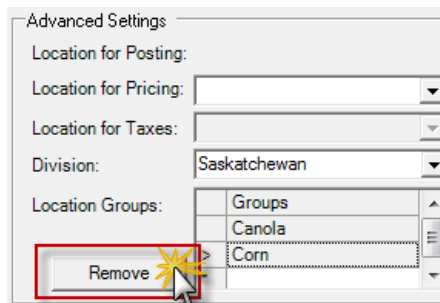

4. *Save* your changes

Removing Locations from Groups

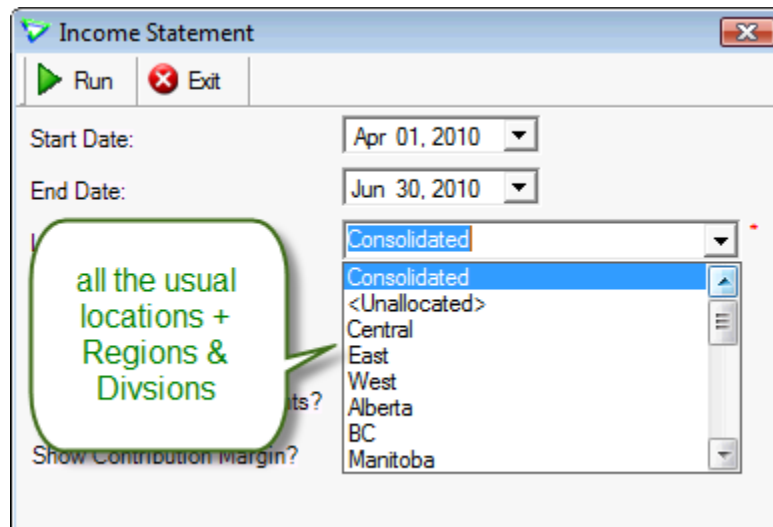Locations are removed from Groups individually.

Remove a Location from a Group

1. Navigate to *File > Manage > Locations*.
2. Select the location and click *Retrieve Data*.
3. On the *Main* tab, select the group, and click the *Remove* button.

4. *Save* your changes.

Report Location Choices

When you run reports, such as the Income Statement, you can choose to show results for a single Location, a Division, a Region or for the entire company (all locations). What choices you'll see in the dropdown menu will be dependent on which Locations, Divisions and Regions your local company security administrator has given you access to.

GL Reports

- Income Statement
- Comparative Income Statement

Inventory Reports

- Inventory Balances
- Inventory Activity Detail
- Inventory Position
- Inventory Current Value

Security for Regions and Divisions

If you require changes to your User Level Security access, please contact your local company security administrator.
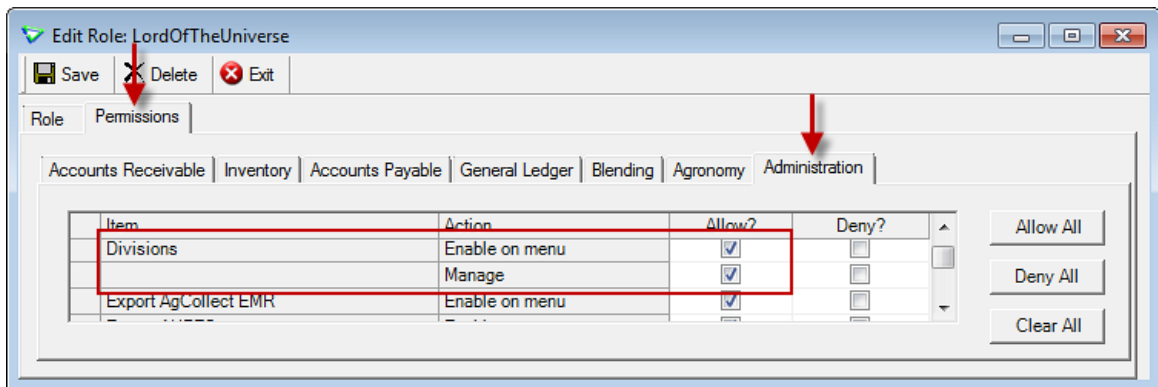
> **Note**: Security settings are managed by your local company security administrators. As with all new features, we don't presume to know who should have access and who should not, so we leave that up to them.

Role Security for Regions, Divisions, and Groups

Users will need to be granted security rights to manage Divisions, Regions, and Groups before any can be created. You'll need to modify an existing role (or create a new one) to allow access to create them.

To grant permission to regions, divisions, and groups

1. Navigate to *File > Security > Manage Roles*

2. Select the Role and click *Edit*

3. Click *Permissions*, then click on the *Administration tab*

4. Scroll down to the *Divisions* section and click *Allow* for the applicable items

5. Do the same for *Groups* and for *Regions*

6. *Save* your changes

Valid Locations for Users

Once the Regions, Divisions and Groups have been created, users (including you) will need to be granted security access to them just like any other location.

To set user valid Locations for regions, divisions, and groups

1. Navigate to *File > Security > Manage Users*

2. Select the user and click *Edit*

3. Under *Valid Locations*, *Allow Access* to all Locations, Groups, Divisions, and Regions the user needs access to

4. *Save* your changes

Caution	When a user runs the *Income Statement* or *Comparative Income Statement* and chooses a Region or Division as the location, they will see summarized results for ALL the locations in that region, whether they have security access to them all or not. They would not be able to select results for any individual locations that they don't have access to.

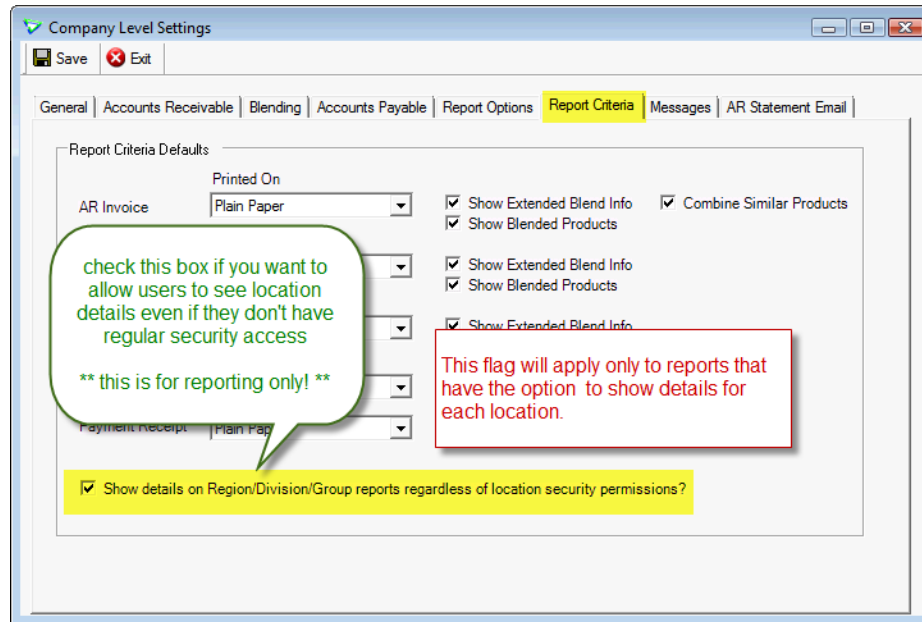# Optional: Show Location Details Company Config Flag

You can decide now if you'll allow users to drill down *on reports only* and show details for locations they don't have access to, or you can decide later when updated versions of more Inventory reports that have this functionality (like Inventory Balances) are released. The flag is OFF by default.

Note:	Currently there are a limited number of reports that summarize data by *Regions* and *Divisions*, and no reports can be summarized by *Groups*. Other GL and Inventory reports that take advantage of this feature will be deployed as they are updated, but you can be ready for them by setting the flag now.

Set the Company Config Flag to Show Details for Locations

1. Navigate to *File > Config Option > Company*

2. Click *Report Criteria*

3. Check the box next to the configuration option to allow users to show reporting details for locations even if they do not have access to them

Note: The *Income Statement* and *Comparative Income Statement* do *not* have the option to show location details so at this time the flag will not affect any reports. It *will* apply to reports that have the option to show details as those reports are updated and deployed.

4. **Save** your changes