

Divisional and Regional Reporting

agre 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.

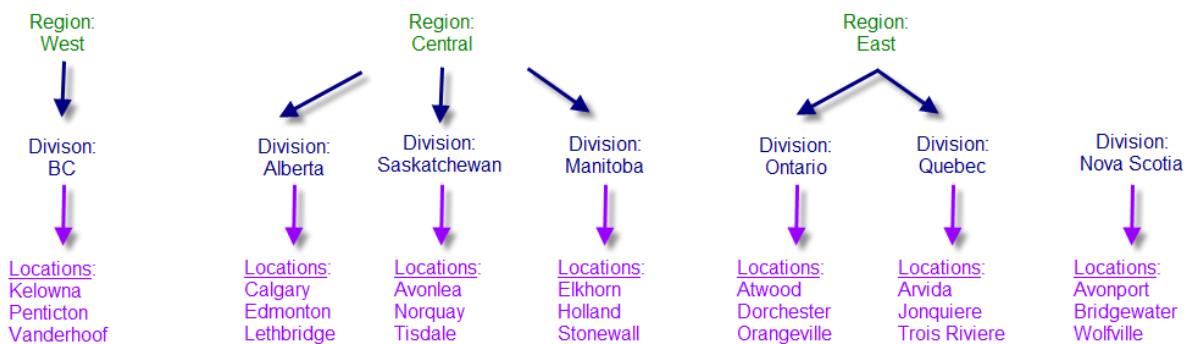
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Regions, Divisions, and Locations

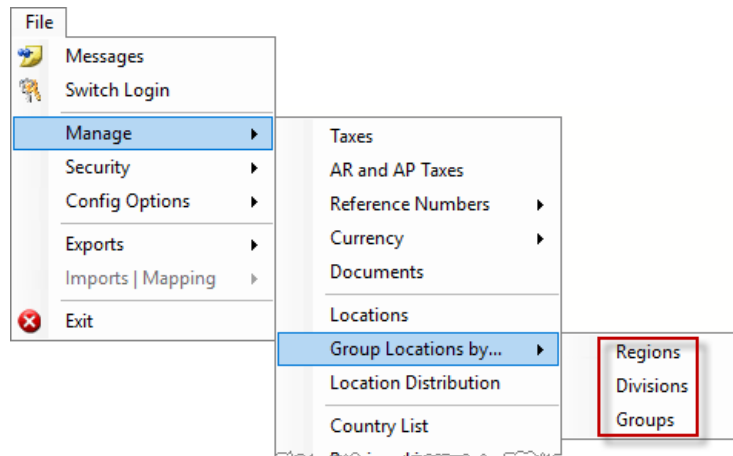
Hierarchy of Locations, Divisions and Regions

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



Defining Regions

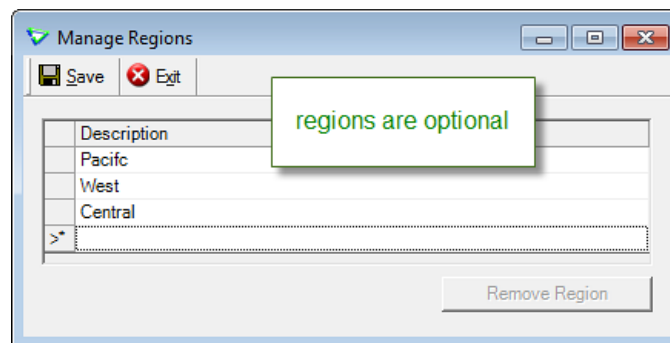
You can summarize Division totals together in a Region if you'd like to, but Regions are not required.



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.



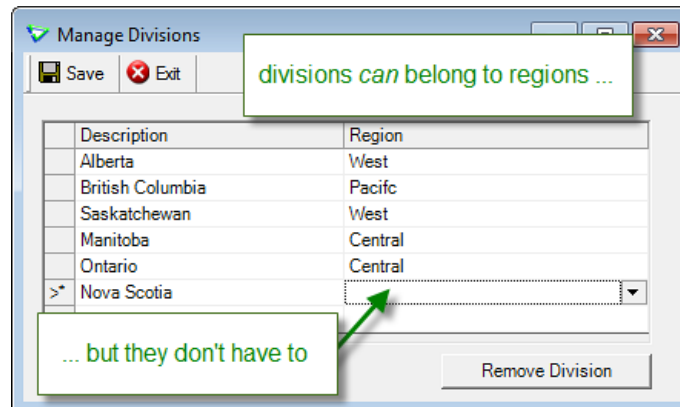
3. **Save** your changes

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



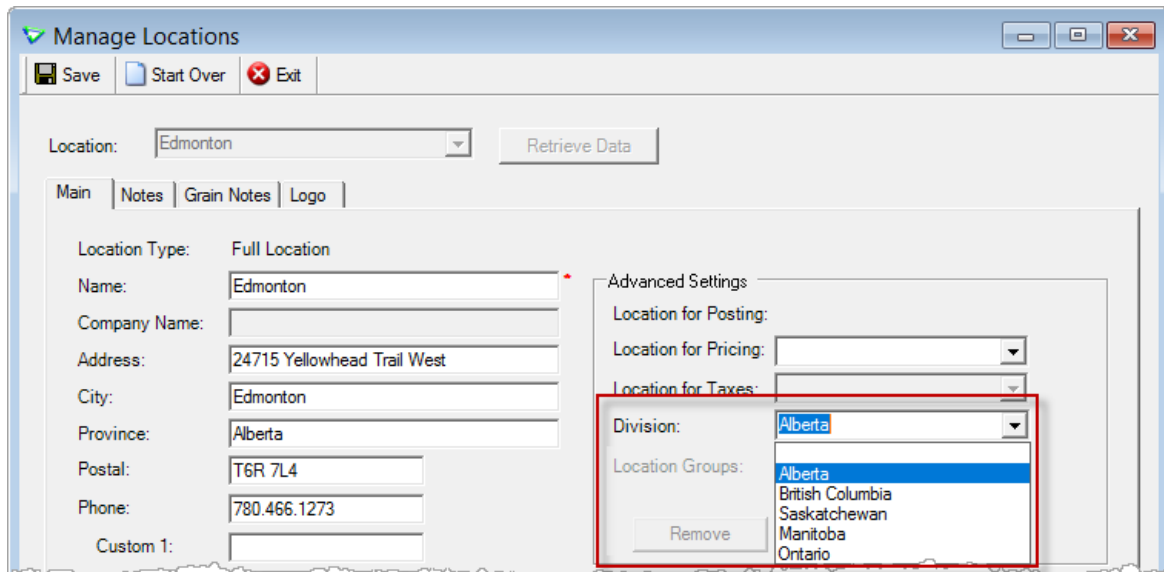
3. **Save** your changes

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.



The screenshot shows the 'Manage Locations' application window. The 'Location' dropdown is set to 'Edmonton', and the 'Retrieve Data' button is visible. The 'Main' tab is selected, displaying location details: Location Type: Full Location, Name: Edmonton, Company Name: (empty), Address: 24715 Yellowhead Trail West, City: Edmonton, Province: Alberta, Postal: T6R 7L4, Phone: 780.466.1273, and Custom 1: (empty). The 'Advanced Settings' section on the right has a 'Division' dropdown menu open, showing a list of provinces: Alberta (highlighted), British Columbia, Saskatchewan, Manitoba, and Ontario. A 'Remove' button is located below the list.

File > Manage > Locations

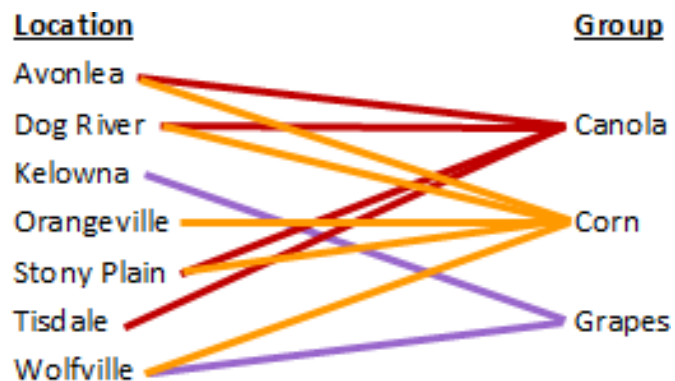
4. **Save** your changes.

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.

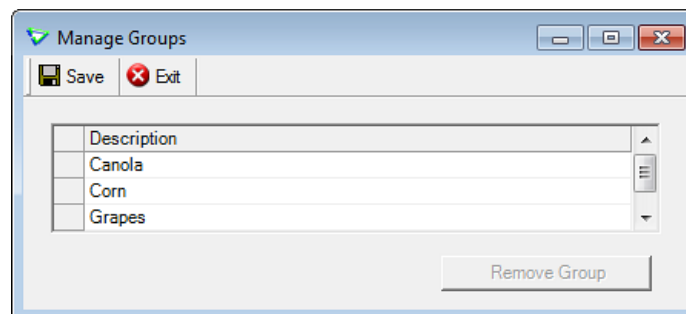


Defining Groups

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



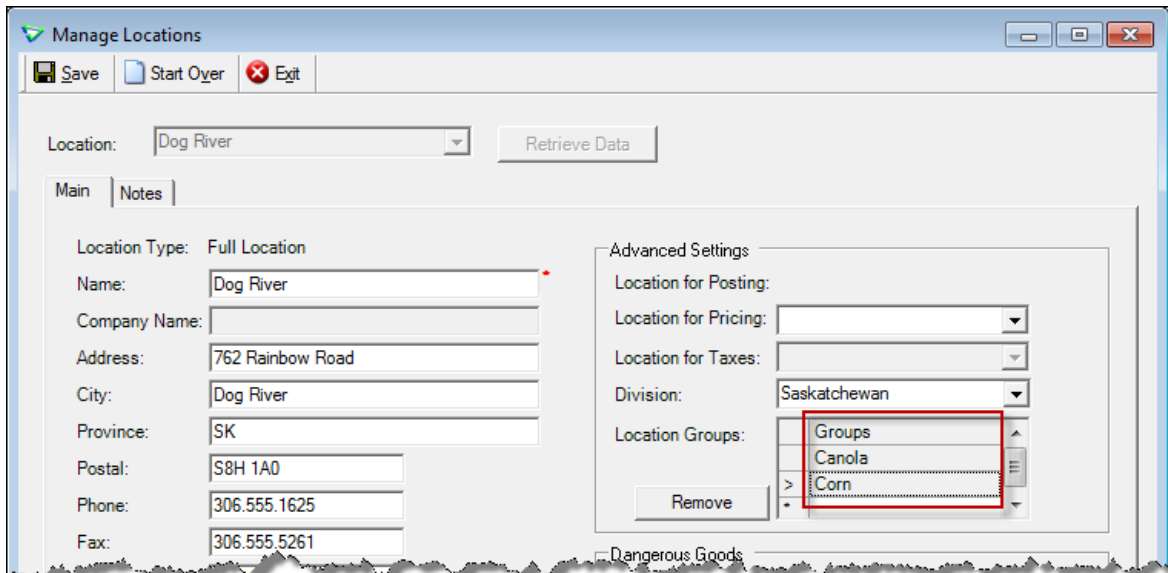
3. **Save** your changes.

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.



The screenshot shows the 'Manage Locations' window. At the top, there's a title bar with 'Manage Locations' and standard window controls. Below the title bar is a toolbar with 'Save', 'Start Over', and 'Exit' buttons. The main area has a 'Location:' dropdown set to 'Dog River' and a 'Retrieve Data' button. Below this are two tabs: 'Main' (selected) and 'Notes'. The 'Main' tab contains two sections: 'Location Type' (set to 'Full Location') and 'Advanced Settings'. The 'Location Type' section has fields for Name, Company Name, Address, City, Province, Postal, Phone, and Fax, all filled with data for 'Dog River'. The 'Advanced Settings' section has dropdowns for 'Location for Posting', 'Location for Pricing', 'Location for Taxes', and 'Division' (set to 'Saskatchewan'). Below these is a 'Location Groups' section with a list box containing 'Groups', 'Canola', and 'Corn'. A red rectangle highlights this list box. To the right of the list box is a 'Remove' button. At the bottom right of the 'Advanced Settings' section is a checkbox for 'Dangerous Goods'.

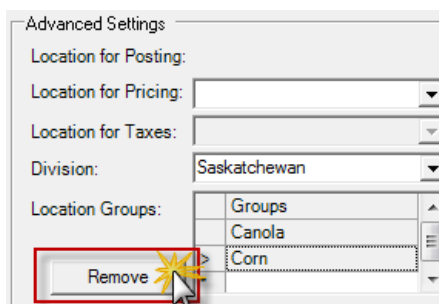
4. **Save** your changes

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.

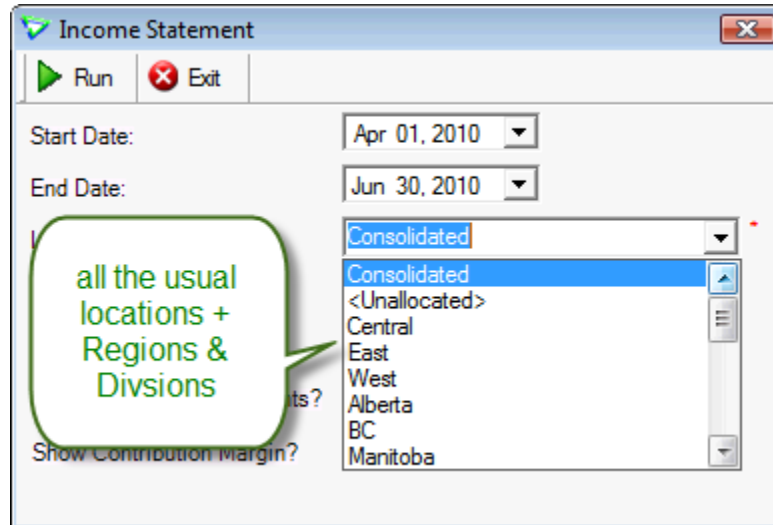


This screenshot is a close-up of the 'Advanced Settings' section from the previous image. It shows the 'Location Groups' list box with 'Groups', 'Canola', and 'Corn' listed. A red rectangle highlights the 'Remove' button located to the left of the list box. A mouse cursor is pointing at the 'Remove' 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.

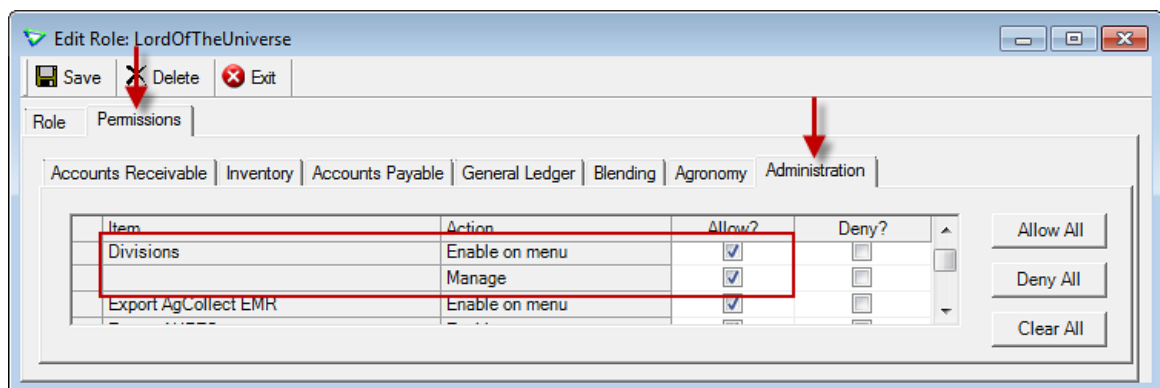
Note: Security settings are managed by your local company security administrators. As with all new features, we don't presume to know who should have access and who should not, so we leave that up to them.

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

Edit User: agre User

User Login Name: TSTagreUser
User Name: agre User
Password: *****
Confirm Password: *****
Initials: A
Location Profile: A
Active? ☒
Default Database: A
Administrator ☐

Roles Assigned to this User:

Role	In Role?
> DebbiesRole	☐
DENY Approve Cheques	☐
except advanced	☐
except min pricing	☐
Joe's Role	☐
Lonna's Role	☐
LordOfTheUniverse	☐

Valid Locations:

Type	Location	Allow Access?
> Region	Central	☐
Region	Pacific	☐
Region	West	☒
Division	Alberta	☐
Division	British Columbia	☐
Division	Manitoba	☐
Division	Nova Scotia	☐
Division	Ontario	☐
Division	Saskatchewan	☒
Group	Canola	☒
Group	Corn	☒
Group	Grapes	☐
Company	<Company>	☐
Location	Cardlock Station	☐
Location	Dog River	☒
Location	Edmonton	☐
Location	Parkland Warehouse	☐
Location	St. Albert	☐
Location	Stony Plain	☐
Location	Strathcona Warehouse w/ Ble	☐

a user doesn't need to have access to every location in a Division, Region, or Group to see summarized results for ALL locations in that grouping

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.

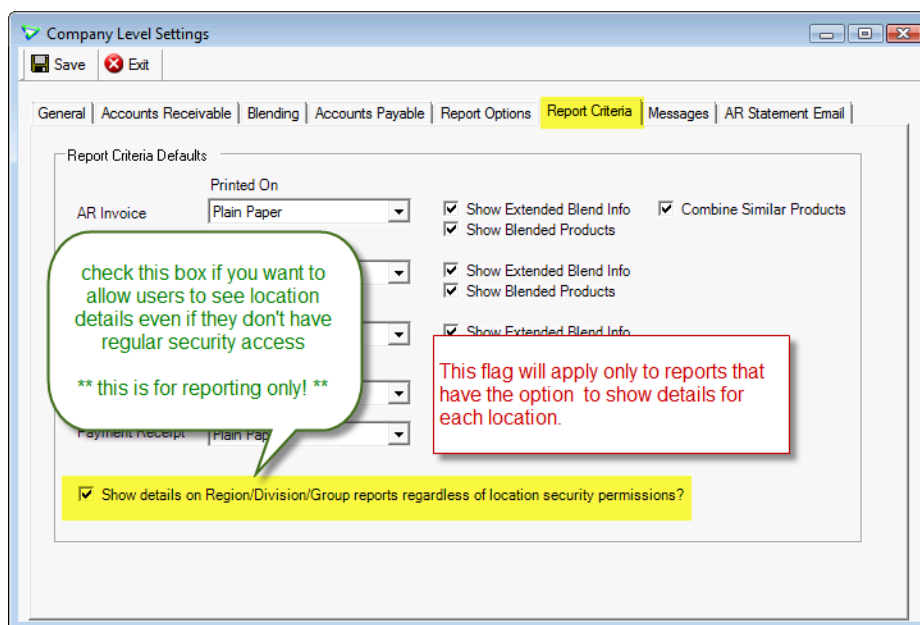
Optional: Show Location Details Company Config Flag

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