Importing a Hierarchy Tree Structure

If you have a large organization, you may find it tedious to manually set up the hierarchy tree within the portal interface. Although there is no direct "import" button for the hierarchy tree setup (different from importing *users* or *vehicles* into the nodes), the following process helps you achieve the same result.

> **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.

> **E X A M P L E**
> Company XYZ has several layers in its organizational structure. The fleet manager wants to import this tree structure to streamline vehicle and user assignment.

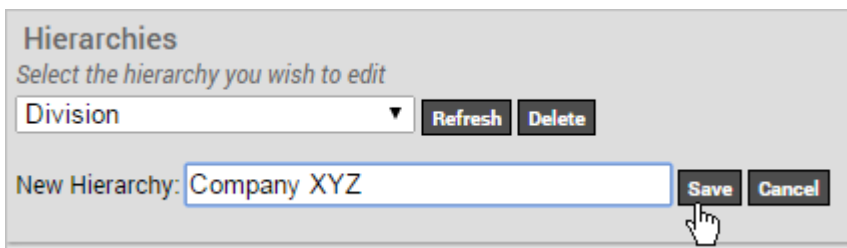▶ **To import a new hierarchy tree:**

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**.

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The Branches pane shows the hierarchy tree. There should not be any child nodes.

1. In Excel, create a new spreadsheet that reflects your tree structure:

- Column A is actually level 1 depth, or the first child.

- Columns B and C in this example (Level 1 and Level 2) are redundant and not required to have both, but we included it to show an example of a hierarchy that might be several layers deep.

- Do not include apostrophes in the node names. Example, change **DIRECTOR'S** to **DIRECTORS**.

- The maximum number of parent nodes per branch is 62.

	A	B	C	D
1	**District Name**	**Level 1**	**Level 2**	**Level 3**
2	District 1	ADMINISTRATION	ADMINISTRATION	AUTOMOTIVE POOL
3	District 1	ADMINISTRATION	ADMINISTRATION	ADMIN EXEC MGMT - DISTRICT DIRECTOR
4	District 1	MAINTENANCE	MAINTENANCE	HYDRAULICS
5	District 1	TRAFFIC OPERATIONS	TRAFFIC OPERATIONS	TRAF ENGR
6	District 1	TRAFFIC OPERATIONS	TRAFFIC OPERATIONS	ELEC SYS
7	District 1	TRAFFIC OPERATIONS	TRAFFIC OPERATIONS	PERMITS - ENCROACHMENT
8	District 1	MAINTENANCE	MAINTENANCE	MAINTENANCE ENGINEERING
9	District 1	MAINTENANCE	MAINTENANCE	MAINTENANCE MANAGER

1. Select all rows, and insert a pivot table (Insert > Pivot Table). Include all Row Labels.

1. From the pivot table, copy the data between the Row Labels and Grand Total (CTRL + C) to your clipboard. In Column B, right-click and choose the Past Special option to paste **Values** only.

1. In column C, denote the levels in the hierarchy using asterisks. Insert one asterisk for the first child, two for the second, three for the third, and so on.
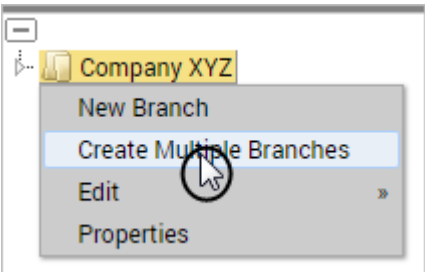
1. When finished, use the CONCATENATE formula to combine the node depth with the node name (=CONCATENATE (C4,B4). Copy that formula and paste it down through the rest of Column C.

1. Copy (CTRL + C) the concatenated contents of Column D.

1. Back in the portal, right-click the top-level tree again (Company XYZ), and click **Create Multiple Branches**.
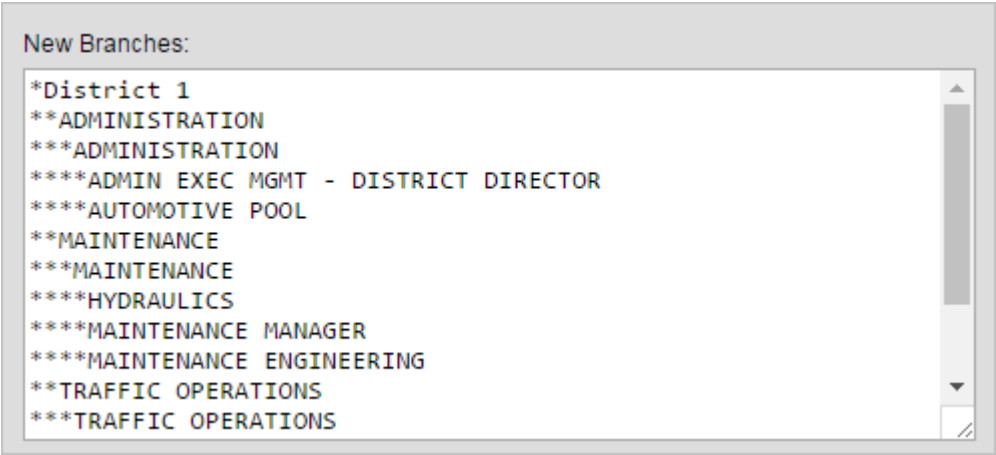

1. In the Create Multiple Branches window, change the **Input Mode** to **Advanced**.
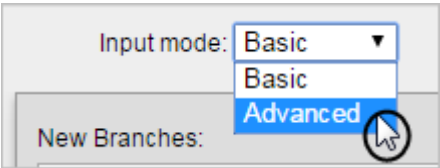
1. In the New Branches box, paste the contents of your clipboard (Column D from the spreadsheet).

1. Click **Preview** to ensure the tree structure is represented accurately.

Link: https://help.responsiblefleet.com/docs/about-hierarchies/importing-a-hierarchy-tree-structure/ Last Updated: August 3rd, 2016

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

> **Note.** A brief pop-up window appears to indicate the number of branches added. Make note of that number and compare it with the number of rows copied from your spreadsheet to make sure they match. If you feel like you goofed somewhere, just delete the whole hierarchy, make adjustments to your spreadsheet, and create it again.

Now you can assign vehicles, users, and/or landmarks to the various nodes using the portal interface or spreadsheet upload.