



Locations & Hierarchy

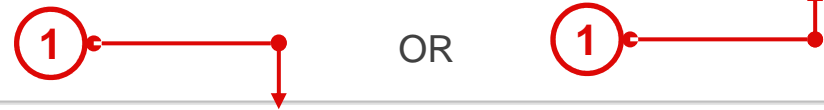
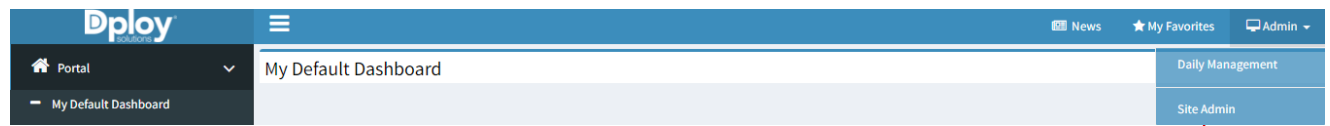


TBM Consulting Group

Navigating to the Locations Page

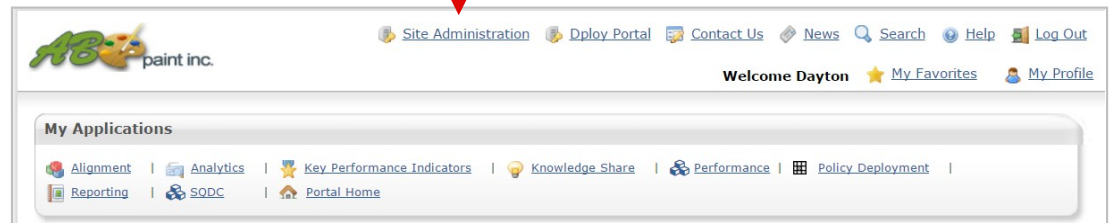
To add levels or change the hierarchy of your locations, navigate to the Site Administration page.

1 From the Dploy Portal, click the Admin link, then the Site Admin link.

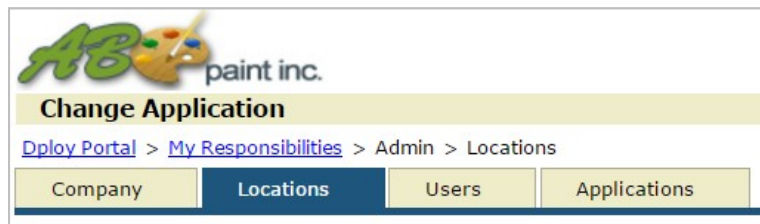


OR

1 From the My Responsibilities page, click the Site Administration link.



2 Click the Locations tab:



Making Changes to Locations

To change settings for a location:

1 Click the Location name, Cincinnati.

2 Make changes.

3 Click Save.

The screenshot displays the 'Change Application' page for the Cincinnati location. The page is titled 'ABC paint inc. Change Application' and shows the breadcrumb path 'Deploy Portal > My Responsibilities > Admin > Locations'. The navigation menu includes 'Company', 'Locations', 'Users', and 'Applications'. The 'Locations' tab is active, showing a tree view of 'ABC Paint Co Locations' with 'Cincinnati' selected. The 'Location Information' form contains the following fields:

- Company Name: ABC Paint Co
- Location Name: Cincinnati
- Hierarchy Path: Cincinnati
- Time Zone: (GMT-06:00) Central Time (US & Canada)
- Culture: English - United States
- Logo: Choose File | No file chosen
- Top Level Location: (From Company)
- Active:
- External Access: Uses Company Setting
- Chart Color: [Color Picker]
- Move To: [Dropdown]

At the bottom of the form, there are two buttons: 'Save' and 'Add Child to this Location'.

Note: If Locations are marked Inactive, they will not show in the Locations tree. Click the "Show Inactive Locations" box to display them.

Adding a Location

To add a location:

1 Click the name of the Location the new location is to be a part of.



2 Click "Add Child to this Location."

3 Click Save.

The screenshot shows a web application interface. On the left is a tree view titled 'ABC Paint Co Locations' with entries: Cincinnati, Corporate, Houston, Lake Charles, Los Angeles, MW Region, New Location, Omaha, Phoenix, Shanghai, SW Region, TBM, and Tucson. A red circle with '1' and an arrow points to 'Corporate'. On the right is a 'Location Information' form for 'Corporate'. Fields include: Company Name (ABC Paint Co), Location Name (Corporate), Hierarchy Path (Corporate), Time Zone ((GMT-06:00) Central Time (US & Canada)), Culture (English - United States), Logo (Choose File, No file chosen), Top Level Location (checked), Active (checked), External Access (Uses Company Setting), Chart Color (purple), and Move To (dropdown). At the bottom of the form are 'Save' and 'Add Child to this Location' buttons. A red circle with '2' and an arrow points to the 'Add Child to this Location' button. A red circle with '3' and an arrow points to the 'Save' button.

Note: To add a location to the Top Level, add the child and then move it to the Top Level (see next slide).

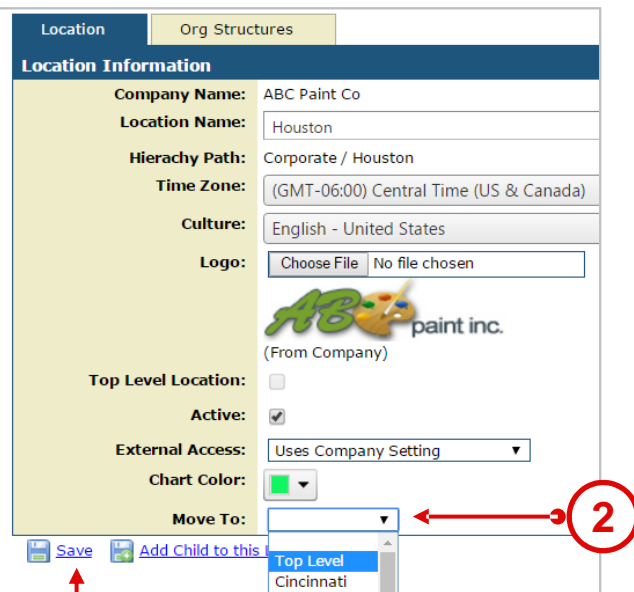
Moving a Location to the Top Level

To move a location to the Top Level of your hierarchy:

- 1 Click the name of the Location to be moved.



- 2 Use the "Move To" dropdown and choose "Top Level."

A screenshot of the 'Location Information' form. The 'Move To' dropdown menu is open, showing 'Top Level' and 'Cincinnati' as options. A red circle containing the number '2' is positioned to the right of the dropdown, with a red arrow pointing to the 'Top Level' option. The form also shows fields for Company Name, Location Name, Hierarchy Path, Time Zone, Culture, Logo, Top Level Location, Active, External Access, and Chart Color.

- 3 Click Save.



Moving a Location to be a Child of another Location

To move a location to under another location in your hierarchy:

- 1 Click the name of the Location to be moved, Omaha.
- 2 Use the "Move To" dropdown and choose the Location you want to move it under. In this case, we want to move it under MW Region.
- 3 Click Save.

The screenshot displays the 'ABC Paint Co Locations' management interface. On the left, a tree view shows the hierarchy: Cincinnati (Corporate), Houston, Lake Charles, Los Angeles, MW Region, New Location, Omaha, Phoenix, Shanghai, SW Region, TBM, and Tucson. A red arrow labeled '1' points to 'Omaha'. On the right, the 'Location Information' panel for 'Omaha' is shown, with fields for Company Name, Location Name, Hierarchy Path, Time Zone, Culture, Logo, Top Level Location, Active status, External Access, and Chart Color. A 'Move To' dropdown menu is open, showing a list of locations including 'MW Region', which is highlighted. A red arrow labeled '2' points to this dropdown. At the bottom of the panel, there are 'Save' and 'Add Child to this' buttons. A red arrow labeled '3' points to the 'Save' button. The footer of the interface includes copyright information: '© Copyright 2007 - 2017 Catal...'.

Dploy Solutions Help Desk

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If you have questions, please reach out to the Dploy Solutions Help Desk at:

help@dplysolutions.com