

# Creating Reporting Groups in CCC® Estimating

## Overview

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**Introduction** The sections in this job aid review topics associated with creating reporting groups in CCC® Estimating.

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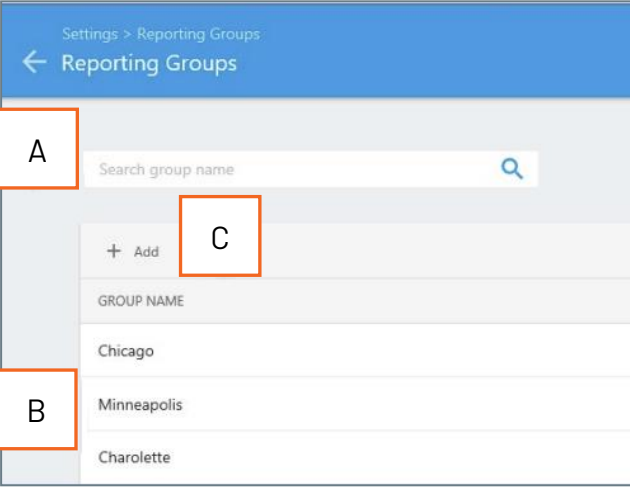
# Using Search in Reporting Groups

## Introduction

This section reviews the steps necessary to access the Reporting Groups screen in CCC® Estimating.

## Accessing the Reporting Groups Screen

Follow the steps below to access the Reporting Groups screen.

Step	Action
1	<p>Click <b>Configure</b>, and then select <b>Reporting Groups</b>.</p> 
2	<p>A web browser window opens and displays the Reporting Groups screen.</p>  <p>A. Search Field B. Search Results C. Add New Reporting Group</p>

# Creating a New Reporting Group

## Introduction

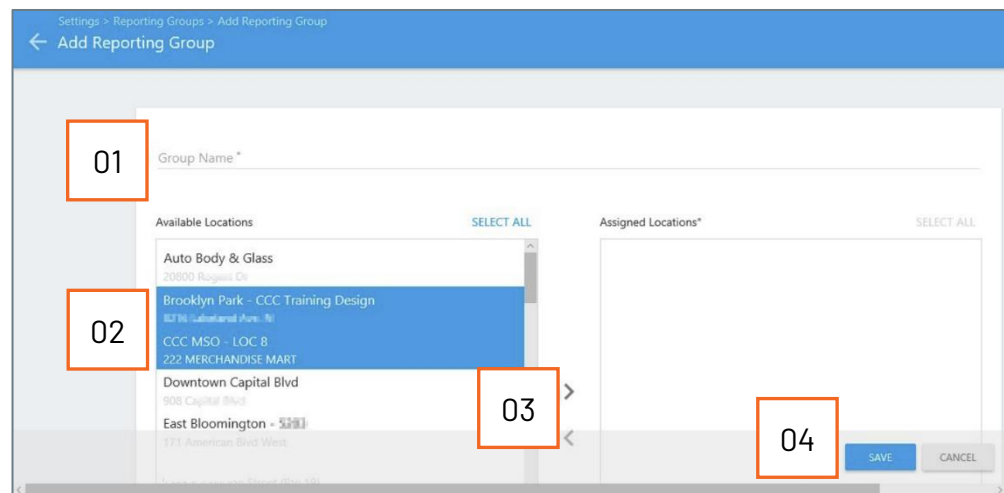
This section reviews the steps necessary to create a new Reporting Group in CCC® Estimating.

**Note:** Required fields are marked with an asterisk (\*).

## Creating the Reporting Group

To create a new Reporting Group, you must enter a Group Name and identify which locations should be included in the Group. This section reviews how to complete the Add Reporting Group form.



Step	Action
1	Enter the group name for the new <b>Reporting Group</b> .
2	Select the <b>locations</b> . Multi-select is shown below.
3	Click the right arrow button to add the selected locations to the <b>Assigned Locations</b> panel. Use the left arrow to remove selected locations.
4	Click <b>SAVE</b> .



# Searching for a Reporting Group

**Introduction** This section reviews the steps to search for existing Reporting Groups.

**Searching for a Reporting Group** Follow the steps below to search for an existing Reporting Group.

Step	Action
1	<p>Select <b>Configure</b> from the main menu bar, and then select <b>Reporting Groups</b>. A web browser window opens and displays the Reporting Groups screen.</p>  <p>The screenshot shows a vertical list of menu items: My Account, Profiles, Machine Settings, Reporting Groups (highlighted with an orange border), Employees, Teams, Security Roles, and Work Hours. Each item has a right-pointing arrow icon.</p>
2	<p>Enter a search term in the <b>Search</b> group name field and click the search icon.</p>  <p>The screenshot shows the 'Reporting Groups' screen. At the top, it says 'Settings &gt; Reporting Groups' and 'Reporting Groups' with a back arrow. Below is a search field with the placeholder text 'Search group name' and a magnifying glass search icon to its right. An orange arrow points to the search field.</p>


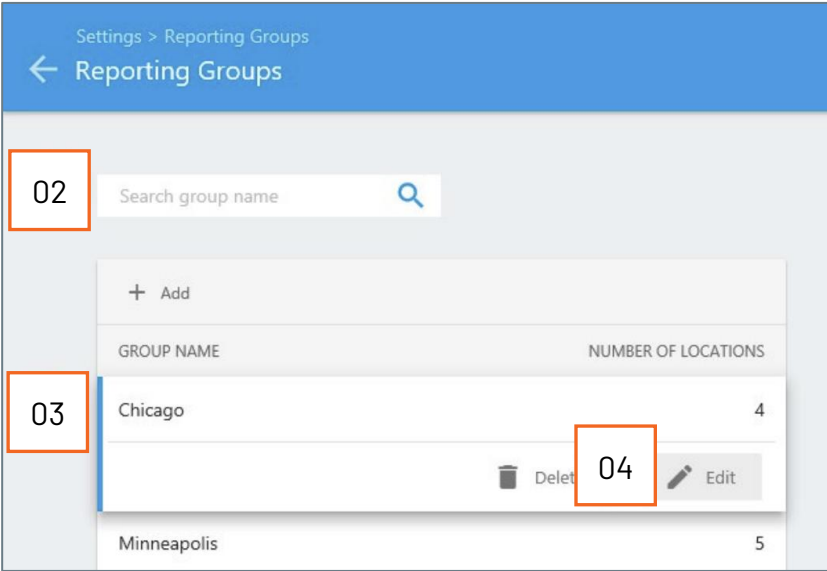
# Add or Remove Locations in a Reporting Group

## Introduction

This section reviews the steps for adding and removing locations in a Reporting Group.

## Adding or Removing Locations

Follow the steps below to add or remove locations in a Reporting Group.

Step	Action
1	<p>Select <b>Configure</b> from the main menu bar, and then select <b>Reporting Groups</b>. A web browser window opens and displays the Reporting Groups screen.</p> 
2	<p>Navigate to and select the <b>Reporting Group</b>.</p> 
3	Click on the Reporting Group.

*Continued on next page*

## Add or Remove Locations in a Reporting Group, Continued

**Adding or Removing Locations,**  
continued

Step	Action
4	Click <b>Edit</b> . The Edit Reporting Group window opens.
5	Select the location, then click on the appropriate arrow buttons to add it to or remove it from the <b>Assigned Locations</b> list.
6	If the location no longer exists, select it, and click <b>DELETE</b> to remove it.
7	Click <b>SAVE</b> .

