Creating reporting entities
with **organizational levels**
(ajeraComplete or **Departments add-on)**

Goal: Your corporate structure is complex, and you want to create groups of departments to report on in your financial statements.
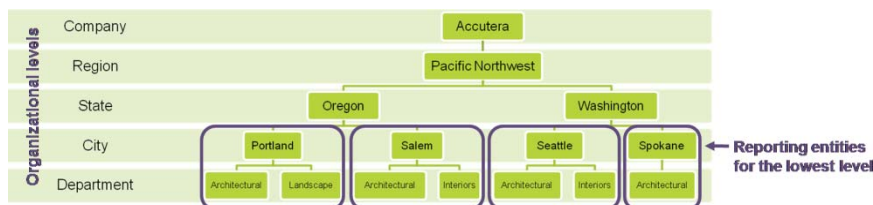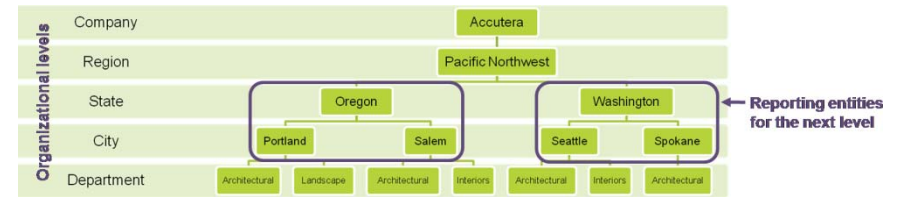
In this quick lesson

If you are using departments, you can create *reporting entities*, which are groups of departments that represent various divisions in your firm. A reporting entity can consist of as many or as few departments as you want, and you can create as many as you need.

If your corporate structure is complex or consists of multiple layers, you can use *organizational levels* to create reporting entities. Organizational levels reflect the structure of your company and make it easier for you to set up and maintain reporting entities.

You first define your organizational levels. Then, create reporting entities for the **lowest organizational level first** by grouping together departments that belong in each entity and identifying each entity with the lowest organizational level.

You create reporting entities for the **second-lowest level next** by grouping together reporting entities from the lowest level , each entity automatically containing the correct departments.
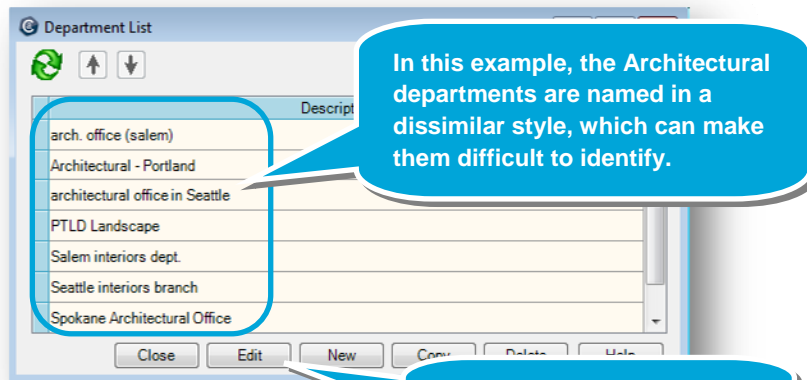

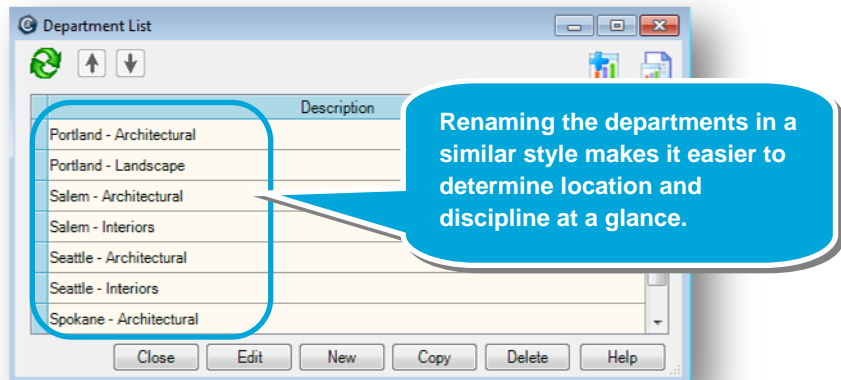Working upward, you repeat this process for each level.

You must then add the reporting entities to statement designs in the Financial Statement Designer to view financial information for each entity (for example, year-to-date revenue for the Portland office).

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Step 1: Review department names

1. Click **Company** > **Financials** > **Departments**.

2. Review your department names to ensure they are detailed enough for easy identification when creating reporting entities. Your departments must be set up before you can create reporting entities.

In this example, the Architectural departments are named in a dissimilar style, which can make them difficult to identify.

To change a name, select a department, and click Edit.

Renaming the departments in a similar style makes it easier to determine location and discipline at a glance.

Step 2: Create organizational levels

1. Click **Company** > **Financials** > **Organizational Levels**.

2. Enter the organizational levels between Company and Department. Organizational levels mirror your corporate structure.

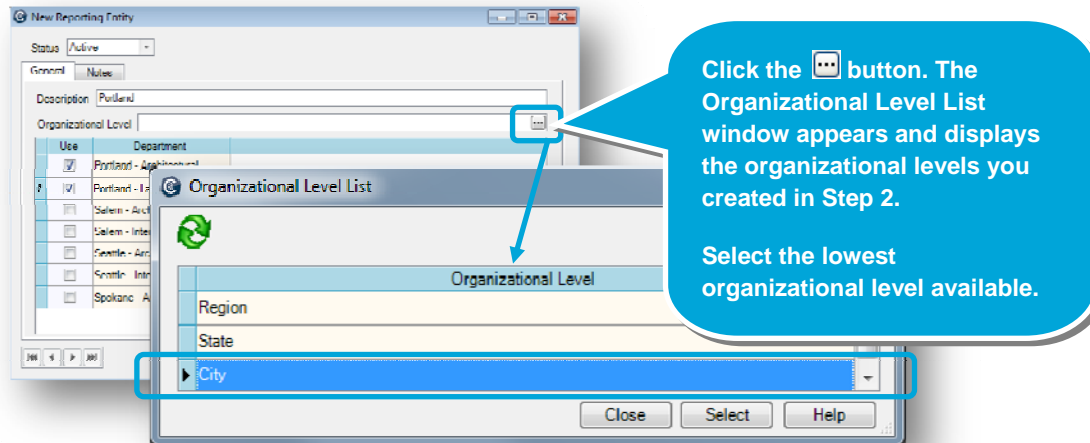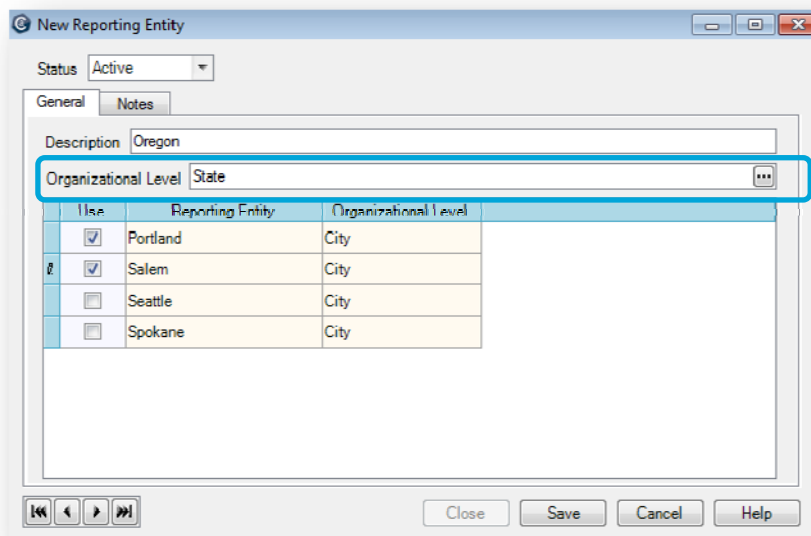**Company and Department are automatically the highest and lowest levels.**

To provide Ajera with labels that reflect the structure of your firm, simply enter them at the appropriate levels.

Step 3: Set up reporting entities

1. Click **Company** > **Financials** > **Reporting Entities**.

2. Set up reporting entities for the **lowest organizational level first**, by selecting the departments that belong in them.
   In this example, you set up reporting entities for each city by selecting the departments that belong in each city entity.

> Click the ⬚ button. The Organizational Level List window appears and displays the organizational levels you created in Step 2.
>
> Select the lowest organizational level available.

3. Select the **second-lowest organizational level next**; reporting entities from the preceding level appear in the table.
   Set up reporting entities for the current level by selecting reporting entities from the previous level.
   Repeat this process for all subsequent levels.

Step 3: Set up reporting entities (continued)

4. Although the reporting entity structure mirrors your corporate structure, it allows optional additional reporting combinations beyond that. For example, you can group together all the Architectural departments to create an Architectural reporting entity that does not fit an organizational level in your corporate structure.

> **You can create reporting entities outside your organizational-level structure simply by not selecting an organizational level in the Reporting Entity window.**
>
> **In this example, the Architectural reporting entity consists of all the Architectural departments in your firm, regardless of city, state, or region.**

Summary

Now that you know how to create reporting entities in Ajera, finish setting up the other entities for your firm.

If your firm structure is simple, see the quick lesson entitled *Creating reporting entities without organizational levels*.

To learn how to add reporting entities to financial statements, see the quick lesson entitled *Using the Financial Statement Designer*.

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