RESEARCH AUTOMATORS

Category Hierarchies

Survey Automator guide

Category Hierarchies

GUIDE REPORT

What is a category hierarchy?

A *category hierarchy* is a structured way of organizing categories into parent–child relationships. Each level represents a layer of specificity, for example, **Region** → **Country** → **Department** → **Team**.

In **Survey Automator**, hierarchical categories can be used to export as **Multiple Reports**. By selecting the **parent** node as the driver variable, you can automatically generate separate reports for all **child** nodes, each including comparisons to its parent level.

Why use hierarchical categories?

Hierarchical categories make complex reporting manageable. They allow:

- **Automatic aggregation** of results from lower to higher levels.
- **Drill-down navigation** in dashboards and reports (e.g., Total → Region → Unit).
- **Consistent data alignment** across surveys sharing the same organization tree.

Without hierarchical categories, each level must be handled manually which can increase the risk of mismatched data or inconsistent roll-ups.

How are hierarchical categories different from other categories?

Ordinary categories are *flat* which means each value exists independently. An example of a flat, background variable would be *gender* or *age groups.*

Hierarchical categories, by contrast, define a **parent–child dependency**, where each node "belongs" to a level above it.

For example:

```
Global
 ├── Region A
 │    ├── Country X
 │    │    ├── Department 1
 │    │    └── Department 2
 │    └── Country Y
 └── Region B
```

This structure enables **multi-level aggregation and filtering** in reports, which cannot be achieved with standard (flat) categories.

Here is another example of how a hierarchical category tree could look after **Categories** has been exported as an **Excel**-file from the **Distribute**-tab:

Path	Treelevel	Name
Company	1	Company
Company/Total	2	Total
Company/Total/Region North	3	Region North
Company/Total/Region North/Team QA	4	Team QA
Company/Total/Region North/Team Sales	4	Team Sales
Company/Total/Region South	3	Region South
Company/Total/Region South/Team QA	4	Team QA
Company/Total/Region South/Team Sales	4	Team Sales

And this is an example of a **flat** category-tree without a properly working **top-node**:

Region	1	Region
Region/Region North	2	Region North
Region/Region South	2	Region South

Working with multi-level hierarchical reporting

When a project uses a hierarchy, you **enable hierarchical reporting per report/dashboard**:

1. Open your **Report** or **Dashboard**.
2. Click the **cogwheel (⚙)** in the top bar and choose **Multiple reports**.
3. Select a **Driver variable** (your hierarchical category).
4. Confirm. The system generates a report "instance" for **each node** in the hierarchy, letting you navigate level by level (e.g., All → Region → Department → Team).

Important details

- **Driver variable = your hierarchy**. Pick the hierarchical category that mirrors your org tree.
- **Top node required.** The hierarchy must have a single top (e.g., "All" / "Company" / "Total"). Without it, totals and roll-ups won't work, and you can't base multiple reports on it.

Important: Always use a Top Node

Each hierarchy must include a **top node** — this acts as the root of the tree.

- The top node represents the **total population** (e.g., "Company" or "All respondents").
- All child levels (regions, departments, etc.) must branch from this top node.
- **You cannot build multiple reports** on the same hierarchy unless it has a defined top node.

  Without it, the system cannot aggregate results properly or calculate overall totals.

Tip*:* Use a neutral label like **"All" or **"Total"** as your top node to make it clear in reports.

Steps after setup

Delete unused descendants

After importing or editing your hierarchy:

- Go to the **Distribute**-tab
- Click on your Category and select **Delete Unused Descendants**.
- This helps avoid blank report entries and keeps the structure clean.

Not seeing any responses?

If your charts or report pages show empty or zero data:

1. **Check the hierarchy connection**

   Confirm that the category variable used in your respondent data matches the hierarchy codes exactly.

2. **Check the Integrity feature**

   In **Report / Dashboard → Cogwheel (⚙) → Integrity**, you can define the **smallest base required to produce data or reports**.

   This means you set a **minimum number of responses** that must be available for a result to be shown in a report or dashboard.

The latest version of this guide: https://www.researchautomators.com/guides/category-hierarchies/