

New Budget Tree is in WISDM

- **PLANUW_BUDGET_ACCT** is in WISDM
- BU Admins are able to access the tree and make it available for end users to select.

WISDM path:

Main Menu > Administration > Edit Trees

- Change the Year to 2020, and the new tree will be in the dropdown.

The screenshot displays the WISDM Tree Administration interface. At the top, the University of Wisconsin System logo and 'WISDM Wisconsin Data Mart for PeopleSoft Financials' are visible. The page title is 'TREE ADMINISTRATION'. A navigation bar includes 'Main Menu', 'Comment', and 'Help', along with a dropdown for 'UWMIL - 2020'. The main content area is divided into two sections:

BUSINESS UNIT TREE SETUP

Default Account Tree for Depts: MIL_FIN_REPORT
Default Account Tree for GPR Funds: MIL_FIN_RPT_NOFB
Default Account Tree for Projects: BUD_CATB
Authorization/Default Dept Tree: MIL_ORG_TREE
Default Sales Credit Account Type: E
Default Level for Unlisted Trees: Most Detail

ACCOUNT TREE LEVEL DEFAULTS

Add Default Tree Level for:

Tree Name	Default Level	Share	Unit Type	Change	Remove
ACCOUNT	Business Unit Major Accounts				
ACCOUNT_NO_FRINGE	Business Unit Major Accounts				
ALL_ACCT_MAJCLASS	2				
BUD_CATB	4				
BUD_CATC	3				
BUD_CATD	4				
BUD_CATE	3				
BUD_CATF	3				

A dropdown menu is open, showing a list of account tree levels. The item 'PLANUW_BUDGET_ACCT' is highlighted in yellow. Other items include EAU_FIN_REPORT_2, EXT_SBOC_REPORT, FINANCIAL_REPORT, GBY_FIN_REPORT, MIL_BFS_ACCOUNT, MIL_BUDGET_DETAIL, MIL_FIN_REPORT, MIL_KK_ACCOUNT, MIL_RECONCILIATION, MIL_WD_ACCOUNT, and PLT_SALFRG_ALLOC.

New Budget Tree is in WISER

- WISER path: Main Menu>Unit Settings>Trees>Account Trees

WISER Main Menu Home Quick Search UWSUP 2019

Unit Settings

Adjust application settings for your business unit

Features Trees Other Options

Use this tab to setup default trees your business unit uses.

Default Trees Account Trees

Add Tree: ALL_ACCT_MAJCLASA Add

	Default Level	Show Sales Credits As	Active?	
ACCOUNT	Major Accounts	R	<input type="checkbox"/>	Remove
ACCOUNT	Major Accounts	R	<input type="checkbox"/>	Remove
ALL_ACCT		R	<input type="checkbox"/>	Remove

Save Changes

Dropdown menu items: ALL_ACCT_MAJCLASA, GBY_FIN_REPORT, GBY_FIN_RPT_NOFB, MIL_BFS_ACCOUNT, MIL_FIN_REPORT, MIL_FIN_RPT_NOFB, **PLANUW_BUDGET_ACCT**, PLT_SALFRG_ALLOC, RECONCILIATION_DET, RVF_FIN_REPORT, RVF_FIN_RPT_NOFB, SHARE_GRANT_ALLOC, SHARE_GRANT_FRINGA, SHARE_GRANT_FRINGE