

# Contents

Tree I	Aaintenance Process Overview1	l
Proce	ss Detail2	2
I.	General Tree Information	2
	Effective Dates	2
	SetIDs2	2
	Tree Levels	2
	Tree Nodes	2
	Tree Structures	3
	Additional Tree Information	3
II.	Tree Manager and Tree Viewer	3
	Tree Definition	)
	Display Options11	i
III.	Building a New Tree	3
IV.	Common Tree Maintenance Actions	3
	Auditing a Tree	3
	Renaming a Tree Node	3
	Moving Tree Nodes or Leaves	)
	Printing a Tree	)
V.	Query Tree Maintenance	)

# **Tree Maintenance Process Overview**

Process Frequency	This process occurs on an ad hoc basis.
Dependencies	None
Assumptions	None
Responsible Parties	Both individuals at the campuses and the UWSA SFS Support Team may need to maintain trees.
Alternate Scenarios	None



# **Process Detail**

### I. General Tree Information

Trees allow you to organize your ChartField values in a hierarchical manner and are mainly used in setting up security, in combination editing, and for reporting. They are used to summarize ChartField values so that the summary levels can be used in other areas of SFS. Multiple trees using the same ChartField values can be created to summarize those values differently for various purposes.

Using Trees has several advantages. When setting up reports or combination edits and rules, it is easier to select values from the tree than selecting and hard coding each detail value. Maintenance is also easier. Instead of updating each report and combo rule when a new department or account is added, Trees allow you to add the new value and have that value reflected in the report and combo rule.

### **Effective Dates**

Trees are effective dated, allowing you to specify new reporting relationships and continue to have history intact. You can use trees with past, present, or future effective dates when reporting on current or historic data.

### SetIDs

When using a SetID as a key value for your tree, you should assign the same SetID as the record that your tree is built on. Department trees, for example, should have a SetID of your Business Unit, since Department values and rollups vary by institution.

### **Tree Levels**

Levels provide a way to organize tree nodes. Sometimes you want to be able to identify all of the nodes on the same level as a group, even when they do not share the same parent. For example, you might create a PS/nVision layout that summarizes the data for a division, and then define a PS/nVision scope that creates one report instance for each division, regardless of what company it is in. To allow you to refer to all the nodes at a level, PeopleSoft Tree Manager enables you to name each level. You will use the level name when you define the scope for your PS/nVision report (rather than identifying all the nodes individually). Level names can appear next to the node description. Naming your levels gives you another way to use the data in the tree. Levels also work well for trees used in WISDM, as the trees will be balanced, meaning detail and higher nodes will not be seen at the same level. The level names will be seen in the drill down level on the summary reports.

### Tree Nodes

Nodes define the hierarchical relationship within the tree. Each detail value reports to a tree node at the next higher level of the organization. Each tree node represents the group of detail values under that node that "report" to it. Referring to the node is a shorthand way of referring to the group of detail values under it.



For example, if a report refers to the Office of the President, it includes data from all the detail values under the Office of the President node—including the detail values under the Human Resources department, because Human Resources reports to the Office of the President. In turn, each tree node reports to another tree node at a higher level of organization, until we reach the top level of the hierarchy, called the root node.

When talking about trees, we use terminology derived from the idea of a family tree. The nodes that report to the root node are called children or child nodes. The root node is their parent. Nodes that have the same parent are called siblings. Detail values, or leaves, link a roll-up structure to the supporting detail. For example, the nodes in an Account tree are categories of Accounts rather than the detailed Accounts themselves. Using the example from above, the account tree has a node called Payroll Expenses, with detail values specifying a range of accounts from 1000 to 1999 rolling up to it.

#### Tree Structures

Tree Structures specify the type of information that PeopleSoft Tree Manager uses to store information about your tree. Depending on the type of tree you are creating, use the following Tree Structure ID:

Type of Tree	Appropriate Tree Structure ID
Account Tree	ACCOUNT
Account Tree that does not contain	
nodes but rather all accounts	ACCOUNT_DETAIL
Department (Org) Tree	ORGANIZATION
Fund Tree	FUND
Project Tree	PROJECT_GL

#### Additional Tree Information

- Trees are based on a single ChartField; they are not used to combine ChartFields.
- You may set up an unlimited number of trees for any ChartField.
- Trees should always be created from the top down.
- Each level/node of the tree is named so that it can be easily referred to for editing and reporting. A node represents the group of detail values that "report" to it.
- Detail values can be defined as a range or as individual, specific values.

### II. Tree Manager and Tree Viewer

Navigation: Tree Manager > Tree Manager Navigation: Tree Manager > Tree Viewer

There are two main ways to look at trees in SFS, either with Tree Manager or Tree Viewer. Tree Manager allows you to view and update trees, while Tree Viewer is read-only access to the tree.



- 1. Enter or Search for the *Tree Name*.
  - a. If you do not know the name, you may want to use the Advanced Search to use multiple search fields. **Click** on the *Advanced Search* hyperlink, which will give you access to additional search fields (shown in the screenshot below).

Favorites Main Me	nu > Tree Ma	nager >	Tree Manager	, ,
Tree Manager				
Enter any information	on you have and (	click Search	h. Leave fields	blank for a list of all values.
Find an Existing T	ree <u>C</u> reate N	lew Tree	1	
- Search Criteria				
· obaron ornorna				
Tree Name:	begins with 👻	1		]
SetID:	begins with 👻			
Set Control Value:	begins with 👻			]
Effective Date:	= •			<b>3</b>
Tree Branch:	begins with 👻			1
Description:	begins with 👻			1
Category:	begins with 👻			۹.
Tree Structure ID:	begins with 👻			۹.
Valid Tree:	= 👻			▼
Node Field:	begins with 👻			۹.
Detail Field:	begins with 👻			]
Case Sensitive				

- 2. Enter your Business Unit in the *Category* field of the Advanced Search. Some Trees that belong to your Business Unit may have a *SetID* of 'SHARE', so entering your Business Unit in the *SetID* field may filter out some trees from your results.
- 3. Click on the Tree Name.
  - a. Trees are effective dated, meaning the information in the trees has to be equal to or less then the effective date of the field added. For example, there are several *Account* trees available, all with different effective dates. Make sure when you select a tree that you click on the appropriate effective dated tree.



Favorites Main Menu > Tree Manag	ger > Tree Manager				
Tree Manager					
Enter any information you have and click	k Search. Leave fields bla	nk for a list of	f all values.		
Find an Existing Tree Create New	v Tree				
🕶 Search Criteria					
Search by: Tree Name	begins with SYS_FUND	_MAJCLASA	]		
Search Advanced Search					
Search Results				_	
View All				First 1-3 d	f3 Las
Tree Name SetID Set Co	ontrol Value Effective Date	Tree Branch	Description	Catego	and the state of the
detto det of					v Valid Tree
SYS FUND MAJCLASA UWSYS (blank	() 07/02/2011	(blank)	Share - Fund tree -Major	dass SHARE	Valid Tree Valid Tree
SYS FUND MAJCLASA UWSYS (blank SYS FUND MAJCLASA UWSYS (blank	() 07/02/2011 () 07/02/2010	(blank) (blank)	Share - Fund tree -Major Share - Fund tree -Major	dass SHARE	Valid Tree Valid Tree Valid Tree

4. To navigate through the tree, **click :** to the left of the node name to expand or collapse the node:

Favorites Main Menu	> Tree Man	ager > Tree	e Manager			
-						
Iree Manage	r					
SetID:	UWSYS	Last Audit:	Valid Tree			
Effective Date:	07/02/2010	Status:	Active			
Tree Name:	SYS_FUND_	MAJCLASS	Used in combo edits	i		
Save As Close	Tree Def	finition Display	Options Print Format			
TOP >REVENUE	TOP >REVENUE					
Collapse All   Expand All Find First Page 🚺 14 of 24						
/ TOP - Top	/ TOP - Top					
E ZLUMP - Zlun	T T ZI UMP - Ziump					
+ SPEXP1 - Supplies and Expense						
FI SALCR1 - Sales Credits						
	🛨 FNAID'T - FINANCIALAID					
🛨 SALPRM - Pe	rmanent Sala	ries				
🗉 🗈 LTESTU - LTE/Student Salaries						



The following icons/actions are available when navigating through trees in *Tree Viewer*.

lcon	Action	Description
2	Expanded Node:	Represents an open node, showing all lower levels of the hierarchy.
<b>-</b>	Collapsed Node:	Represents a node with its contents out of sight until expanded.
Þ	Terminal Node:	Represents a node that has no children.
*	Branch Node:	Represents a node that has been branched.
ø	Detail Value or Leaf (detail/summary trees only):	Represents an individual field value attached to a node at the end of a branch.
∆ <sup>¢</sup>	Expand Node Hierarchy:	Expands all child objects.

*Tree Manager* enables you to view, create, and modify trees. In addition to the icons/actions listed above in *Tree Viewer*, the following actions are available in *Tree Manager*.

Label/Hyperlink	Description
Collapse All	<b>Click</b> to close all of the visible nodes except for the root node. The root node is always expanded.
Expand All	<b>Click</b> to expand all of the nodes on the tree, so that the entire tree or branch hierarchy is visible. Expands all parent/child relationships, but the tree hierarchy is still presented one page at a time. Use the Next and Previous page arrows to page forward and backward through the tree.
Find	Click to access the Find Value page and search for nodes and detail values



Label/Hyperlink	Description
	Find Value         Find Tree Node         Description:         OR         Fund Code:         Description:         Case Sensitive Search         Exact Matching         Find         Close    Select 'Exact matching' to search for an exact match. Clear the check box to perform partial searches. If you clear this check box, the system automatically adds a wildcard character at the end of the user defined search condition. Example search for description (%cash%). This search will find all descriptions containing cash.
Save	Saves the tree and performs audits on detail values.
Save Draft	Saves the tree, but doesn't perform audits. Trees will be marked as Draft until audits are run against it and tree is valid.
Save As	Allows you to save the tree with a different name or effective date. This is an easy way to copy the tree to make changes.



Label/Hyperlink	Description
Tree Definition	Displays the Tree Definition and Properties page
Print Format	Formats the completed tree so that is can be printed using the internet browser's printing functionality
Close	Closes the tree

Depending on the level you are at in viewing the tree, there will be several different icons available in Tree Manager, which include:

lcon	Action	Description
<b>ii</b> +	Insert Sibling Node	Inserts a new node that shares the same parent as the currently highlighted node.
ŧĭ.	Insert Child Node	Inserts a new node that reports to the currently selected node.
Ø.	Insert Detail	Inserts a new detail value or range of values. This is only available if the detail value information has been entered on the Tree Structure.
<u>ن</u> ية الأ	Expand Node Hierarchy	To expand all child objects for a node, first expand the node, then click the image with two folders
<del>5</del> 7	Update node properties (i.e. Rename a Node)	Displays the <u>Node Properties page</u> , which enables you to change the level of a node or <b>rename a node.</b>
		Use renaming cautiously. You would only want to use this rename function when you are sure nothing else is linked to it. Keep in mind any nVision reports, nVision scopes, combination



lcon	Action	Description
		edits, allocations, closing rules, etc., that may have relied on the OLD NAME will also have to be updated.
R	Edit properties	Allows you to change the detail value or detail "range from" and "range to" values.
L	Edit data	Displays a page for maintaining or editing the application data for the node or detail values. This includes changing the node description. At the detail level, this option takes you back to the application pages so you can actually add detail values to the table or change existing ones.
E <mark>.</mark>	Delete	Deletes the selected node.
<b>R</b>	Delete Detail	Deletes the selected details.
x	Cut	Marks the highlighted tree component as 'cut' and copies it to the clipboard where you can use either Paste as Sibling or Paste as Child commands.
±	Paste as Sibling	Allows you to paste a node that you have previously cut into the tree as a sibling of another node.
ŧ	Paste as Child	Allows you to paste a node that you have cut into the tree as a child.
*	Branch	Subdivides or splits that part of the tree into a separate component that can be maintained and viewed separately from the main tree.
×.	UnBranch:	Removes the selected branch. PeopleSoft Tree Manager replaces the branch image with the node image. Any nodes that report to the selected node are now available in the tree.

### **Tree Definition**



Favorites Main Men	u 👌 Tree Mai	nager > Tre	e Manager	
Tree Manager				
SetID:	UWSYS	Last Audit:	Valid Tree	
Effective Date:	07/02/2010	Status:	Active	
Tree Name:	SYS_FUND_	MAJCLASS	Used in combo edits	
Save As Close Tree Definition Display Options Print Format				

- 5. From the *Tree Manager* page, **Click** on the *Tree Definition* hyperlink will allow you to view and modify Tree properties. In this section, you can:
  - a. Enter a new description and category of the tree
  - b. Select the tree to be 'Active' or 'Inactive'
  - c. **Select** how you want the tree to handle audits
  - d. Modify levels and how they are used
- 6. **Select** *Save As* will also bring up the tree definition page, with more of the fields available to update (such as effective date).

Favorites Main Me	nu > Tree Manag	er > Tree Manage	er
Tree Definition	and Properties		
*Tree Name:	SYS_FUND_MAJO	LASS	
*Structure ID:	FUND		
*Effective Date:	07/02/2010 📴 * S	tatus: Active	•
*Description:	Used in combo ed	lits	
*Category:	UWSYS	<b>Q</b>	
*Use of Levels:	Level Not Used		erformance Options
*SetID:	UWSYS		
Audits		Item Counts	
All Detail Val	ues in this Tree	Node Count:	14
M Allow Duplic	ate Detail values	Leaf Count:	231
		Level Count:	0
Perform Audits		Branch Count:	0
Save As S	ave As Draft	Close	

Each of the field labels on the Tree Definition and Properties page are described below:



Label	Description
Tree Name	Required if creating a new tree, otherwise, it will not be updatable unless doing as 'Save As' with the tree.
Structure ID	The Structure ID defined the field or Chartfield upon which the tree is based
Effective Date	The effective date of the tree must be the same or later than the date of the detail values used in the tree, if the detail values are effective dated.
Status	Either Active or Inactive. Only active trees can be used by other applications.
Description	Free form text field to further define the tree's purpose
Category	Additional field to categorize trees. We strongly suggest using your campus designation (i.e. UWGBY) here to show ownership
Use of Levels	Options include Strictly Enforced, Loosely Enforced, or Level Not Used. Levels will make reporting easier. If there is a hierarchy in the detail value used in the tree, PeopleSoft recommends using levels.
Set ID	Select the Set ID to assign to the tree. We recommend you using the same Set ID the detail value uses.
All Details Values in this Tree	When this box is checked, Tree Manager performs an audit to verify that all detail values defined for the field are included in the tree. If detail values are missing, a warning message will appears upon save and the tree will be saved as draft.
Allow Duplicate Detail Values*	Select this check box if multiple values will be included in the tree. Any tree used in WISDM cannot have duplicate values. When creating combination rules, there may be times when you want duplicate values in your tree. For instance, if you are creating a rule based on valid departments by fund, and the levels represent funds, depending on the department structure, there may be instances where departments are valid with multiple funds.
Perform Audits button	Will perform tree audits to ensure all details are included in tree (if box checked). The tree audit is also run every time the tree is saved.

### **Display Options**



Favorites I	Main Menu	> Tree Man	ager > Tree	a Manager
Tree M	lanage	r		
SetID:		UWSYS	Last Audit:	Valid Tree
Effective [	)ate:	07/02/2010	Status:	Active
Tree Name	e:	SYS_FUND_N	MAJCLASS	Used in combo edits
Save As Close Tree Definition Display Options Print Format				

- 7. From the *Tree Manager* page, **Click** on the *Display Options* hyperlink will allow you to view and modify Tree properties. On this page you can:
  - a. Turn off and on the display of tree node descriptions
  - b. Set the default action for dragging and dropping nodes
  - c. Determine the number of lines to see per page.

Favorites Main Menu > Tree Manager >	Tree Manager
Taroncos Hair Fiend > Tree Hanager >	free Hanager
Configure User Options	
Display Options	
Display Node Id	
Display Node Description	
Display Detail Values	
Show Detail Description	
Display Levels	
Display Lines Per Page: 60	
Nodes Drag/Drop Default Action	
Paste As Sibling Node	
Paste As Child Node	
Update Cancel	

Label

Description



Label	Description
Tree Name	Required if creating a new tree, otherwise, it will not be updatable unless doing as 'Save As' with the tree.

### III. Building a New Tree

*Navigation: Tree Manager > Tree Manager* and **click** on the 'Create New Tree' tab or Save an existing tree 'Save As' from an existing tree.

1. **Complete** the *Tree Definition and Properties* page. Explanations for each of these fields can be found above in the <u>Tree Definition</u> section.

Tree Definition and Propertie	S		
*Tree Name:			
*Structure ID:	Q,		
*Effective Date: 03/26/2013	03/26/2013 📴 *Status: Active -		
*Description:			
*Category: DEFAULT	Q,		
*Use of Levels: Strictly Enforce	d		
Audits	Item Counts		
All Detail Values in this Tree Allow Duplicate Detail Values	Node Count: 0		
	Leaf Count: 0		
	Level Count: 0		
	Branch Count: 0		
ОК	Return to Search		

- 2. Click OK
- 3. Add Tree Levels, if needed, in the 'Step 1' section.
  - a. If your tree will use levels (thus being a balanced tree), enter the levels on this page in the 'Step 1' section. It is recommended to use levels especially on Department (Organization) trees. This way when you build an nVision scope you can select items on the tree by the level as opposed to specifying each tree node. In addition, if you add a new tree node your scope is automatically updated because it is referencing the level.
- 4. Add the *Root Node* in the 'Step 2' section.
  - a. The root node is needed for every tree and is also known as the top of the tree.
- 5. Click OK



Tree Levels			Personalize   Find   View All   🖾   🛗 First	1 of 1 🖸 Last
evel Name	All Values	Description	View Detail	Delete Level
			View Detail	Delete Level
Add Level				

- 6. **Click** the <sup>fi</sup> icon to insert the first child node of root node.
  - a. You can either enter a new node, or select one that already exists.
    - i. If you entered values that have already been defined, PeopleSoft Tree Manager
      - adds the values to the tree when you click
    - ii. If you enter a new value, PeopleSoft Tree Manager informs you that you have entered an undefined value. Depending on your security access, PeopleSoft Tree Manager may enable you to add the new value.

Insert Child	Node	
*Tree Node:		
	Add	Cancel

- 7. **Repeat** this process for the remaining sibling nodes of the first child.
- 8. Add detail values to the newly created nodes.



- a. **Click** on the node to which you would like to add a detail value. To complete a detailvalue tree, you need to define detail values for each *terminal* node in the tree, which means each node that has no child nodes.
- b. Click the 🧖 (Insert Detail) image.
  - i. To enter a single value, **enter** the same value in the *From* and *To* fields. **Click**
  - ii. To enter a range of values, **enter** the *From* value and the *To* value. **Click**
  - iii. If you are creating a dynamic detail tree, **select** the *Dynamic Flag* check box. The Detail Value Range page appears. It shows the tree node that the new values report to. If you **click** the Dynamic Flag check box other fields on a page become

locked. When you **click** Add, PeopleSoft Tree Manager displays brackets [] in place of the detail value for the selected node. When you use the tree, the system automatically selects the appropriate detail values for the node.

iv. If you **enter** a new value, PeopleSoft Tree Manager will inform you that you have entered an undefined value. Depending on your security access, PeopleSoft Tree Manager may enable you to add the new value, which is the same as adding a new ChartField. Be careful when typing this information.

Detail Value F	lange		
Tree Node:	102		
	Dynamic	Flag	
Range From:			Q
*Range To:			Q
(	Add	Cancel	

- 9. Repeat this process for the remaining detail values in your tree.
- 10. **Save** the Tree.
- 11. In order to access this tree when creating reports, combo edit rules, allocations, and other processes, you must navigate to: PeopleTools > Utilities > Administration > TableSet Control
- 12. Enter your SetID.
- **13. Click** the Tree tab.
- **14. Click** the 🛨 to add your new Tree to this list.
- 15. Enter your SetID first, this will return the correct list of Tree Names from which to choose.
- 16. Enter your Tree Name.



Favorites Main Menu > Peo	pleTools > Utilities > Administra	ation > TableSet Control	
•	· · ·		
Record Group Tree			
Set Control Value: UW	ISYS		
SetID			
	E o		
*Default SetID: SHAR	E 🔍		
Tree Controls	Personalize   f	Find   View All   🗖   🛗 First 🖡	1-10 of 12 🕨 Last
<u>*Tree Name</u>	Description	*SetID Short Description	n
FUND_TO_PROJECT	Select funds require project	UWSY	+ -
<u> </u>		<u> </u>	
SYS_ACCT_MAJCLASS		UWSY	+ -
SYS_CABINET_REPOR	Cabinet Level Budget Status	UWSY: UWSYS	+ -
	_		

17. Click 🔚 Save

### **IV. Common Tree Maintenance Actions**

### Auditing a Tree

PeopleSoft delivers a Tree Audit process, which creates a list of all missing values from a tree if the 'All Detail Values included in Tree' box is checked on the Tree Definition. The audit process will list each problem the tree may have in one report.

Navigation: Tree Manager > Tree Auditor

- 1. Add a new run control or open an existing one.
- 2. Enter the SetID.
- 3. Enter or Search for the *Tree Name*.
- 4. For the *Date Selection*, if you are auditing the current tree, **select** the 'As of Current Date' option. Otherwise, you can enter a specific effective date.
- 5. Click Run



Favorites Main Menu > Tree Manager > Tree Auditor	
Tree Auditor	
Run Control ID: TREEAUDIT	Report Manager Process Monitor Run
Audit Care	
Audit Scope	
Single Tree	
Tree Definition	
Tree Name: SYS_FUND_MAJCLASS SetId:	UWSYS
Date Selection	
© Effective Date of Tree 07/01/2003	
As of Current Date	
As of Specific Date     03/26/2013	
© All Trees	
View Results	
Save Notify	🕞 Add 🛛 🖉 Update/Display

- 6. Select 'PSUNX' as the Server. OK
- 7. Click

Server Name:       PSUNX <ul> <li>Run Date:</li> <li>03/26/2013</li> <li>Run Time:</li> <li>9:15:01AM</li> <li>Reset to Current Date/Time</li> </ul> Time Zone: <ul> <li>Run Time:</li> <li>9:15:01AM</li> <li>Reset to Current Date/Time</li> </ul> rocess List           elect         Description         Process Name         Process Type         *Type         *Format         Distrit           TREEMAINT         TREEMAINT         Application Engine         Web         PDF         Distrit			Run control 15.	IREEAUDII		
Process List     Process Name     Process Type     *Type     *Format     Distribution       Image: Second Process Name     Process Type     *Type     *Format     Distribution       Image: Second Process Name     TREEMAINT     Application Engine     Web     PDF     Distribution	Server Name: PSUNX - Recurrence: - Time Zone: 4	Run Date: 03 Run Time: 9:1	/26/2013 Ø	Reset to Cu	rrent Date/Time	e
Description         Process Name         Process Type         *Type         *Format         Distrit           TREEMAINT         TREEMAINT         Application Engine         Web         PDF         Distrit	ess List					
TREEMAINT TREEMAINT Application Engine Web - PDF - District	Description	Process Name	Process Type	*Type	<u>*Format</u>	Distribution
	TREEMAINT	TREEMAINT	Application Engine	Web	PDF •	<ul> <li>Distribution</li> </ul>

- 8. When this process has run to success, **click** the *View Results* link on the bottom left hand corner of the Run Control page OR navigate to Tree Manager > Tree Utilities > Repair Tree Reports.
- 9. If there are errors for that Process Instance, the number of errors will be listed along with a hyperlink to the detailed report.



Batch Re	port			
Process Instance	e: 6139082	Run Control ID:	TREEAUDIT	
User ID:	bmchugh		Run Date/Time:	03/26/13 9:23:20AM
Show Reports C	riteria			
Reports with Data				
Report List		Personalize   F	ind   View All   🗖	First 🚺 1 of 1 🖸 Last
Open Report	Report Content			Total Row Count
Open Report	Detail Value Not Found in Tree			57

10. Click on the Open Report link. This will display the values in error, in this case 'Detail Values that are not Found in the Tree'.

Detail Value Not Fo	ound in Tree			
Tree does not contain values that are in the a	all detail values found in the application table. Following are a list of keys of detail application table, but are not defined in the tree			
Note : The report lists out only the first 300 values that are not found in the tree $$\rm$				
Audit Report	Find View All First 🚺 1 of 1 🗅 Last			
SetId: UWSYS SetCn	trlValue: <none> Tree Name: SYS_FUND_MAJCLAS2 Eff Date: 2013-03-26</none>			
Results	Personalize   Find   View All   🖾   🛗 First 🚺 1-20 of 57 🕨 Last			
Detail Value Key Field	1			
170				
172				
173				
183				
185				
407				

### Renaming a Tree Node

- 1. To rename a Tree Node, **click** on the Node you'd like to rename.
- Click the <sup>C</sup> (Update Node Properties) Icon.
   Enter the *New Name*.
- 4. Click Rename



Node Proper	ties	
Tree Node: New Name:	ZLUMP	Q
	Rename	Close

### Moving Tree Nodes or Leaves

There are two ways to move tree nodes or leaves, either by **dragging and dropping**, or by **cutting and pasting** using the X (Cut), i (Paste as Sibling), and i (Paste as Child) icons.

In the Display Options, which are described above, you can specify whether the drag and drop default action is to 'Paste as a Child' or 'Paste as a Sibling'. When dragging and dropping, **click and hold** the mouse button while you **drag** the item to the correct place.

When using the cutting/pasting option, once you **click** on the X icon, the node or leaf will be highlighted in yellow, as seen below.



### **Printing a Tree**

There may be times when you would like to print a hard copy of a tree for your reference.

Navigation: Tree Manager > Tree Viewer

1. Navigate to the Tree.



- 2. **Select** the Node you would like to print. **Click** on the 'TOP' node will print format the entire tree for printing.
- 3. Click Print Format

Tree Manager					
SetID:	UWSYS	Last Audit:	Draft Tree		
Effective Date:	03/26/2013	Status:	Active		
Tree Name:	SYS_FUND_I	MAJCLAS2	Test Tree		
Save Draft	Save As Clos	<u>e T</u>	ree Definition	Display Options Print For	mat
TOP >ZLUMP					
Collapse All   Expand	<u>All Find</u>			First Page 🔳	16 of 24
🕼 TOP - Top	np				

4. **Print** this page from your web browser.

### V. Query Tree Maintenance

Maintenance of Query Trees is performed by UWSA Problem Solvers. If there is a record that you are unable to view/utilize in PS Query Manager, please contact UWSA Problem Solvers at <u>uwsaproblemsolvers@maillist.uwsa.edu</u>.

# **Revision History**

Author	Version	Date	Description of Change
Brendan McHugh	1.0	3/26/2013	Initial Draft
Susan Kincanon	1.1	05/07/2013	Final review and publish to website
Jon Ahola	1.2	06/13/2013	Final review