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Tree Maintenance Process Overview

<table>
<thead>
<tr>
<th>Process Frequency</th>
<th>This process occurs on an ad hoc basis.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependencies</td>
<td>None</td>
</tr>
<tr>
<td>Assumptions</td>
<td>None</td>
</tr>
</tbody>
</table>
### 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:

<table>
<thead>
<tr>
<th>Type of Tree</th>
<th>Appropriate Tree Structure ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Tree</td>
<td>ACCOUNT</td>
</tr>
<tr>
<td>Account Tree that does not contain nodes but rather all accounts</td>
<td>ACCOUNTDETAIL</td>
</tr>
<tr>
<td>Department (Org) Tree</td>
<td>ORGANIZATION</td>
</tr>
<tr>
<td>Fund Tree</td>
<td>FUND</td>
</tr>
<tr>
<td>Project Tree</td>
<td>PROJECT_GL</td>
</tr>
</tbody>
</table>

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: Select ‘GL WorkCenter’ title from the Home Page
(System Navigation: Tree Manager > Tree Manager)
(System Navigation: Tree Manager > Tree Viewer)

1. Select ‘Other Links’ from the WorkCenter Links Pagelets
2. Select ‘Tree Manager’ from the WorkCenter Links Pagelets

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).

![Tree Manager](image)

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.

![Tree Manager](image)
4. To navigate through the tree, click to the left of the node name to expand or collapse the node:

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon-expanded" alt="Expanded Node" /></td>
<td>Expanded Node:</td>
<td>Represents an open node, showing all lower levels of the hierarchy.</td>
</tr>
<tr>
<td><img src="icon-collapsed" alt="Collapsed Node" /></td>
<td>Collapsed Node:</td>
<td>Represents a node with its contents out of sight until expanded.</td>
</tr>
<tr>
<td><img src="icon-terminal" alt="Terminal Node" /></td>
<td>Terminal Node:</td>
<td>Represents a node that has no children.</td>
</tr>
<tr>
<td><img src="icon-branch" alt="Branch Node" /></td>
<td>Branch Node:</td>
<td>Represents a node that has been branched.</td>
</tr>
<tr>
<td><img src="icon-detail" alt="Detail Value or Leaf" /></td>
<td>Detail Value or Leaf (detail/summary trees only):</td>
<td>Represents an individual field value attached to a node at the end of a branch.</td>
</tr>
<tr>
<td><img src="icon-expand" alt="Expand Node Hierarchy" /></td>
<td>Expand Node Hierarchy:</td>
<td>Expands all child objects.</td>
</tr>
</tbody>
</table>

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.
<table>
<thead>
<tr>
<th>Label/Hyperlink</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collapse All</td>
<td>Click to close all of the visible nodes except for the root node. The root node is always expanded.</td>
</tr>
<tr>
<td>Expand All</td>
<td>Click 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.</td>
</tr>
<tr>
<td>Find</td>
<td>Click to access the Find Value page and search for nodes and detail values. 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.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves the tree and performs audits on detail values.</td>
</tr>
</tbody>
</table>
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.
<table>
<thead>
<tr>
<th>Label/Hyperlink</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save As</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Tree Definition</strong></td>
<td>Displays the Tree Definition and Properties page</td>
</tr>
</tbody>
</table>

![Tree Definition and Properties](image)
<table>
<thead>
<tr>
<th>Label/Hyperlink</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print Format</strong></td>
<td>Formats the completed tree so that is can be printed using the internet browser’s printing functionality</td>
</tr>
</tbody>
</table>

**Tree Definition and Properties**

- **Tree Name:** ACCOUNT
- **Structure ID:** ACCOUNT_DETAIL
- **Effective Date:** 07/02/2015
- **Status:** Active
- **Description:** Account Tree for Reporting

**Audits**

- All Detail Values in this Tree
- Allow Duplicate Detail Values

**Item Counts**

- Node Count: 960
- Leaf Count: 0
- Level Count: 8
- Branch Count: 0

**Tree Manager**

- **Set ID:** SHARE
- **Effective Date:** 07/02/2015
- **Tree Name:** ACCOUNT
- **Status:** Active

**Display Options**

- Collapse All
- Expand All
- Find
- First Page
- Last Page

**Print Format**

- ALLACT - All Account C/F
- ASSETS - Assets
- LIAB - Liabilities
- EQUITY - Fund Equity
- EXPNS - Expenses
- REVENU - Total Revenue & Sales Credits
Depending on the level you are at in viewing the tree, there will be several different icons available in Tree Manager, which include:

- **Close**: Closes the tree
<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Insert Sibling Node" /></td>
<td><strong>Insert Sibling Node</strong></td>
<td>Inserts a new node that shares the same parent as the currently highlighted node.</td>
</tr>
<tr>
<td><img src="image" alt="Insert Child Node" /></td>
<td><strong>Insert Child Node</strong></td>
<td>Inserts a new node that reports to the currently selected node.</td>
</tr>
<tr>
<td><img src="image" alt="Insert Detail" /></td>
<td><strong>Insert Detail</strong></td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="Expand Node Hierarchy" /></td>
<td><strong>Expand Node Hierarchy</strong></td>
<td>To expand all child objects for a node, first expand the node, then click the image with two folders.</td>
</tr>
<tr>
<td><img src="image" alt="Update node properties (i.e. Rename a Node)" /></td>
<td><strong>Update node properties (i.e. Rename a Node)</strong></td>
<td>Displays the Node Properties page, which enables you to change the level of a node or <strong>rename a node</strong>. 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 edits, allocations, closing rules, etc., that may have relied on the OLD NAME will also have to be updated.</td>
</tr>
<tr>
<td><img src="image" alt="Edit properties" /></td>
<td><strong>Edit properties</strong></td>
<td>Allows you to change the detail value or detail “range from” and “range to” values.</td>
</tr>
<tr>
<td><img src="image" alt="Edit data" /></td>
<td><strong>Edit data</strong></td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td><strong>Delete</strong></td>
<td>Deletes the selected node.</td>
</tr>
<tr>
<td><img src="image" alt="Delete Detail" /></td>
<td><strong>Delete Detail</strong></td>
<td>Deletes the selected details.</td>
</tr>
<tr>
<td><img src="image" alt="Cut" /></td>
<td><strong>Cut</strong></td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="Paste as Sibling" /></td>
<td><strong>Paste as Sibling</strong></td>
<td>Allows you to paste a node that you have previously cut into the tree as a sibling of another node.</td>
</tr>
<tr>
<td><img src="image" alt="Paste as Child" /></td>
<td><strong>Paste as Child</strong></td>
<td>Allows you to paste a node that you have cut into the tree as a child.</td>
</tr>
<tr>
<td><img src="image" alt="Branch" /></td>
<td><strong>Branch</strong></td>
<td>Subdivides or splits that part of the tree into a separate component that can be maintained and viewed separately from the main tree.</td>
</tr>
</tbody>
</table>
Icon | Action | Description
--- | --- | ---
[ ] | 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

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

<table>
<thead>
<tr>
<th>Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tree Name</td>
<td>Required if creating a new tree, otherwise, it will not be updatable unless doing as ‘Save As’ with the tree.</td>
</tr>
<tr>
<td>Structure ID</td>
<td>The Structure ID defined the field or Chartfield upon which the tree is based.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>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.</td>
</tr>
<tr>
<td>Status</td>
<td>Either Active or Inactive. Only active trees can be used by other applications.</td>
</tr>
<tr>
<td>Description</td>
<td>Free form text field to further define the tree’s purpose.</td>
</tr>
<tr>
<td>Category</td>
<td>Additional field to categorize trees. We strongly suggest using your campus designation (i.e. UWGBY) here to show ownership</td>
</tr>
<tr>
<td>Use of Levels</td>
<td>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.</td>
</tr>
<tr>
<td>Set ID</td>
<td>Select the Set ID to assign to the tree. We recommend you using the same Set ID the detail value uses.</td>
</tr>
<tr>
<td>All Details Values in this Tree</td>
<td>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.</td>
</tr>
<tr>
<td>Allow Duplicate Detail Values*</td>
<td>Select this check box if multiple values will be included in the tree. Any tree used in WISDM cannot have duplicate values. 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.</td>
</tr>
<tr>
<td>Perform Audits button</td>
<td>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.</td>
</tr>
</tbody>
</table>
Display Options

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.

<table>
<thead>
<tr>
<th>Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tree Name</td>
<td>Required if creating a new tree, otherwise, it will not be updatable unless doing as ‘Save As’ with the tree.</td>
</tr>
</tbody>
</table>

III. Building a New Tree

(System 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 Tree Definition section.
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**
6. **Click** the 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 Add
      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.

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 detail-value 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** Add
      ii. To enter a range of values, **enter** the *From* value and the *To* value. **Click** Add
      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 Range](image)

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 plus sign (+) 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**.
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.

System 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
6. **Select** ‘PSUNIX’ as the **Server**.
7. **Click** **OK**

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.
10. **Click** on the *Open Report* link. This will display the values in error, in this case there are no errors found in the tree so the open report link is not present. If errors exist, the report would show this detail:
Renaming a Tree Node

1. To rename a Tree Node, **click** on the Node you’d like to rename.
2. **Click** the (Update Node Properties) Icon.
3. **Enter** the *New Name*.
4. **Click** Rename

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 🗿 (Cut), 🍂 (Paste as Sibling), and 🍂 (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 🗿 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 Screenshot](image)

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 uwsaproblemsolvers@mailist.uwsa.edu.

VI. Tree Export

As with other PeopleSoft Application Engine processes, you initiate the TreeMover process from PeopleSoft pages. You need to submit a few required parameters at runtime, including the file name for each tree import (load) or tree export (unload). You can run TreeMover each time you need to load a tree, or you can set PeopleSoft Process Scheduler to run a tree load process automatically.

*System Navigation: Tree Manager > Tree Utilities > Export Tree*

This example illustrates the fields and controls on the Tree Export page.
To export a tree to an external file:

1. In the Tree Export page, enter the correct output file name.
   
   The flat file is sent to the working directory for PeopleSoft Application Engine as specified on the Process Type Definition page in Process Scheduler. If this is not the location you want, enter the valid path name for the directory on the application server that runs the process.

2. Enter the tree name, effective date, and tree key value
   
   **Note:** The tree key value applies to only setID, business unit, or user-defined key trees (tree key type is set in the tree structure). For trees that have no additional key value, the field is not available.

3. Select the tree data to export.
   
   You can export the tree structure data, the tree definition, the tree levels, the tree level data, the tree nodes and leaves, and the tree node data. You also can export the tree definition, tree level, and tree node/leaf data.

4. Click the Run button to move the tree.

5. Verify that the settings on the Process Scheduler Request page are correct, and click OK to run the process.

6. Check the run status in the Process Monitor.
If an Error or Warning status exists for the process, check the TreeMover log file which may contain additional information that describes the problem. Potential problems are not limited to – but may include – the following:

- You tried to export tree level data and the tree has no levels.
- You tried to export tree user level data and the tree does not use the PS_TREE_LEVEL_TBL for level data.
- You tried to export tree user node data and the tree does not use the PS_TREE_NODE_TBL.

**VII. Tree Import**

*System Navigation: Tree Manager > Tree Utilities > Import Tree*

PeopleSoft Tree Manager does not accept wildcard characters. To prevent creating a corrupted tree, the Tree Import utility checks for invalid tree node names.

This example illustrates the fields and controls on the Tree Import page.
To import an existing PeopleSoft tree:

1. In the Tree Import page, enter the correct input file name.
   The flat file is sent to the working directory for PeopleSoft Application Engine as specified on the Process Type Definition page in PeopleSoft Process Scheduler. If this is not the location you want, enter the valid path name for the directory on the application server that runs the process.

2. Select a save method.
   By default, you should use the Save option. However, if you think the tree might not pass all the PeopleSoft tree audits, then select the Save Draft option, which saves the tree in draft mode and functions just as it does in PeopleSoft Tree Manager.

3. If the tree already exists in your database, select the Replace Tree if Exists option.
   Note: IF the tree already exists in your database and you do not select the Replace Tree if Exists option, the tree will not import.

4. Select the Load Tree Defn from File (load tree definition from file) option if the tree definition is contained in the input file and you want to load the tree with the same tree definition values.
   Note: In most cases, you want to load the tree definition from the file. If you select this option and the tree definition does not exist in the input file, then the load process fails.

5. Enter the basic tree information if you are not loading the tree definition from the input file.
   - If you are not loading the tree definition from the input file, then you are required to specify all the basic tree information on the run control page. These fields correspond to the same values that you’d have to enter if you were creating the tree using PeopleSoft Tree Manager. TreeMover skips the input record that contains the tree definition information and instead use the values that you enter.
   - You must load the tree definition from the file if you’re also loading the tree structure from the file. If you try to load the structure from the file, but have overridden the definition values on the page, then the process will not run completely.
   - TreeMover loads a new tree structure only if the structure doesn't already exist.

6. Select the encoding option. The available options are ANSI and UTF-8
6. Click the run button to move the tree.

7. Verify the successful completion of the process by checking the run status of the process in the Process Monitor.
   - If you receive either a run status of Warning or No Success, view the message log for additional information.

### VIII. Tree Delete

**System Navigation:** Tree Manager > Tree Utilities > Copy/Delete Tree

This example illustrates the fields and controls on the Tree Maintenance page. Definitions for the fields and controls appear following the example.

#### Search for an Existing Tree

1. To delete a tree, select its check box.
Click the delete button

2. The following message will appear.

3. Click Yes.
IX. Tree Copy

Navigation: Tree Manager, Tree Utilities, Copy/Delete Tree, Copy button

This example illustrates the fields and controls on the Copy Tree page

![Copy Tree Page Screenshot]

Make any necessary changes and click the Copy button.

### Revision History

<table>
<thead>
<tr>
<th>Author</th>
<th>Version</th>
<th>Date</th>
<th>Description of Change</th>
</tr>
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<tbody>
<tr>
<td>Brendan McHugh</td>
<td>1.0</td>
<td>3/26/2013</td>
<td>Initial Draft</td>
</tr>
<tr>
<td>Susan Kincanon</td>
<td>1.1</td>
<td>05/07/2013</td>
<td>Final review and publish to website</td>
</tr>
<tr>
<td>Jon Ahola</td>
<td>1.2</td>
<td>06/13/2013</td>
<td>Final review</td>
</tr>
<tr>
<td>Linda Diring</td>
<td>2.0</td>
<td>07/20/2018</td>
<td>Update for SFS 9.2 Upgrade</td>
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