GL.010.017 - COPYING A TREE DEFINITION

Purpose	• To identify when key rollup trees should be copied. • To identify the purpose of the new effective dating policy relating to ChartField values and trees. • To copy a tree definition.
Description	At the end of the fiscal year, users copy key rollup trees from the previous fiscal year's tree and give an effective date of the first day of the new fiscal year (July 1). The system or the user adds any new ChartField values utilizing the same date. The purpose for the new effective dating policy is so that the University System of Georgia can maintain a historical view of ChartField values and balances while minimizing the amount of maintenance.
Security Role	BOR_FN_TREE_MGR
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to copy a tree with a new effective date.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Tree Manager** link.
4.	Click the **Tree Utilities** link.
5.	Click the **Copy/Delete Tree** link. The system navigates to the Tree Maintenance page.
6.	Locate the tree and effective date combination to copy.
7.	Click the **Select** checkbox next to the tree and effective date combination to copy.
8.	Click the **Copy** button. The system generates the Copy Tree popup window.
9.	Enter new effective date in the **Effective Date** field.
10.	Click the **Copy** button. The system navigates back to the Tree Maintenance page.
11.	If the tree added successfully, it displays in the grid with the new effective date.