GL.010.010 - MAINTAINING TREES

Purpose	• To define what a tree is in PeopleSoft. • To identify what activities can be performed by using the Tree Manager function. • To maintain a tree.
Description	A tree is the graphical hierarchy in PeopleSoft that displays the relationship between all accounting units, for example, departments, projects, reporting groups, account numbers, and determines roll-up hierarchies. In a tree, to roll up is to total sums based on information hierarchy. The activities included in maintaining trees include adding a rollup value; correcting the description of a rollup value; deleting a rollup value; adding a detail value; adding a range of detail values; changing a range of detail values; reviewing the detail values within a range; and deleting a detail value.
Security Role	BOR_FN_TREE_MGR
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to perform the following actions in the Budget Translation-Accounts Tree.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Navigate to **Tree Manager**.
4.	Click the **Tree Manager** link.
5.	Enter Tree Name in the **begins with** field.
6.	Click the **Search** button.
7.	Select one of the following actions to perform within the tree: • Add a Rollup Value Proceed to Steps 8 - 12 • Correct the Description of a Tree Node Proceed to Steps 13 - 18 • Delete a Rollup Value Proceed to Steps 19 - 24 • Add a Detail Value to a Tree Node Proceed to Steps 25 - 31 • Add a Range of Detail Values to a Tree Node Proceed to Steps 32 – 34 • Change a Range of Detail Values Proceed to Steps 40 – 46 • Review Detail Values within a Range Proceed to Steps 47 – 51
8.	To add a rollup value, click the **Insert Child Node** button
9.	Enter an Account name in the **Tree Node** field.
10.	Click the **Add** button.
11.	Verify a rollup value was added to the tree node.
12.	**End of Procedure.** Remaining steps apply to other paths.
13.	To correct the description of a tree node, click the **Edit Data** button.
14.	Enter a Description in the **Description** field.
15.	Click the **OK** button.
16.	Click the **Save Draft** link.
17.	Verify the description changed.

Step	Action
18.	**End of Procedure.** Remaining steps apply to other paths.
19.	To delete a rollup value, click the link to delete.
20.	Click the **Delete** button.
21.	Click the **Yes** button.
22.	Click the **Save** link.
23.	Verify the rollup value is no longer listed.
24.	**End of Procedure.** Remaining steps apply to other paths.
25.	To add detail value to a tree node, click the **Expand Node** button.
26.	Click the **Insert Detail** button.
27.	Enter a Range in the **Range From** field.
28.	Click the **Add** button.
29.	Click the **Save** link.
30.	Notice the addition.
31.	**End of Procedure.** Remaining steps apply to other paths.
32.	To add a range of detail values to a tree node, click a link.
33.	Click the **Insert Detail** button.
34.	Enter a Range in the **Range From** field.
35.	Enter a Range in the **Range To** field.
36.	Click the **Add** button.
37.	Click the **Save** link.
38.	Verify the addition.
39.	**End of Procedure.** Remaining steps apply to other paths.
40.	To change the range of detail values, click a link.
41.	Click the **Edit Properties** button.
42.	Enter a Range in the **Range To** field.
43.	Click the **Update** button.
44.	Click the **Save** link.
45.	Verify the change.
46.	**End of Procedure.** Remaining steps apply to other paths.
47.	To review detail values within a range, click the **Expand Node** button.
48.	Click a link.
49.	Click the **Edit Data** button.

Step	Action
50.	Click the **Close** button.