Tree Reporting

The purpose of this document is to list the hierarchy of departments (division, program center, college) in Sac State using the Financial Data Warehouse (FDW).

Assumptions:
- You have access to the FDW.
- You know how to login to the FDW.
- You have already setup your defaults for the environment.

A. Select the "Tree Reporting" dashboard:
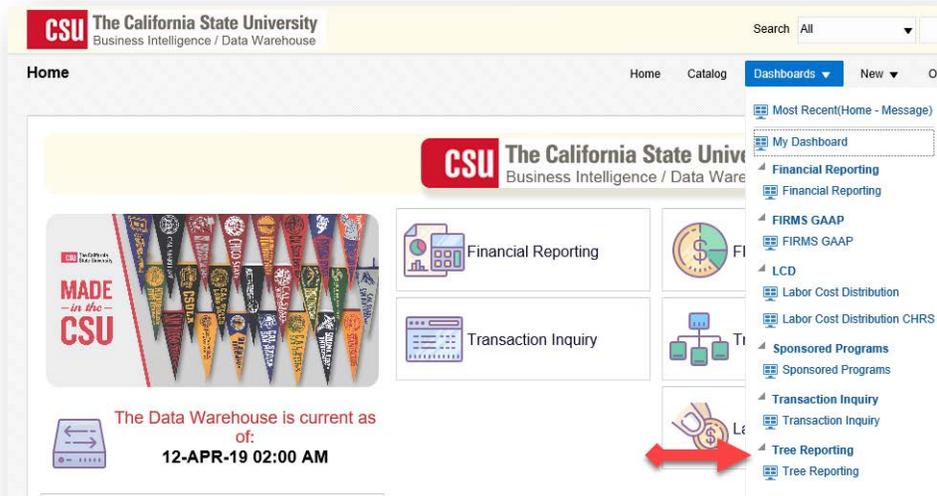
B. Select "Department Tree":

C. Click on the drop-down arrow for "SETID":

D. Click the box for "SACST":

E. The value for "Primary Tree Flg" defaults to "Y". Do not change it.

F. Click on the drop-down arrow for "Dept Tree":

G. Click the box next to SAC_DEPT_TREE_RS:

H. Click the "Apply" button:

I. Sample Output:

Optional Steps:

Exclude Unnecessary Columns:
This example will exclude the SETID column. This is not necessary since all rows are for SACST. This column can be omitted so users can concentrate on the important information. This technique can also be applied to columns "Dept Tree Name", "Dept Level 4 Fdescr" and "Dept Level 5 Fdescr".

A.   Hover your mouse above the SETID column and gray bar will appear:

B. Right click on the gray bar and select "Exclude column":

Optionally, you can right click anywhere on the column to get the same options.

C. In this example report, I excluded 4 columns:

You can add the column back:
1. Right-click any column header
2. Click on "Include column"
3. Click on the column to be included. The following example includes the SETID back into the report.
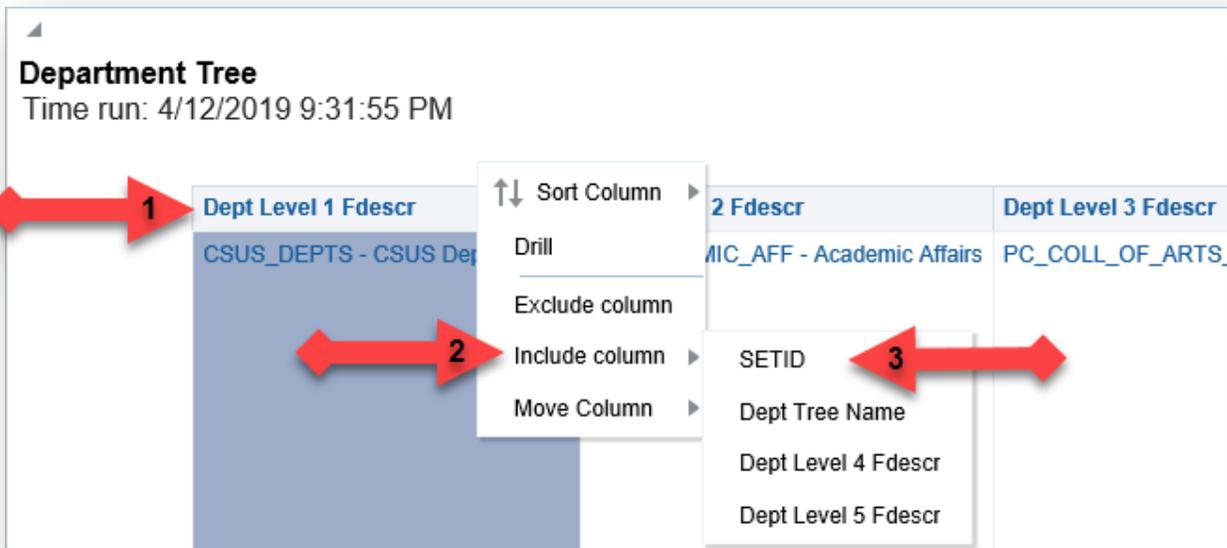
Save Customization:

Your filters can be saved and easily reused later. Use a "customization" for this functionality. This example will save the above steps as a customization called "DeptHierarchy".

1. Click on the "gear" in the upper right corner.
2. Click on "Save current Customization…":
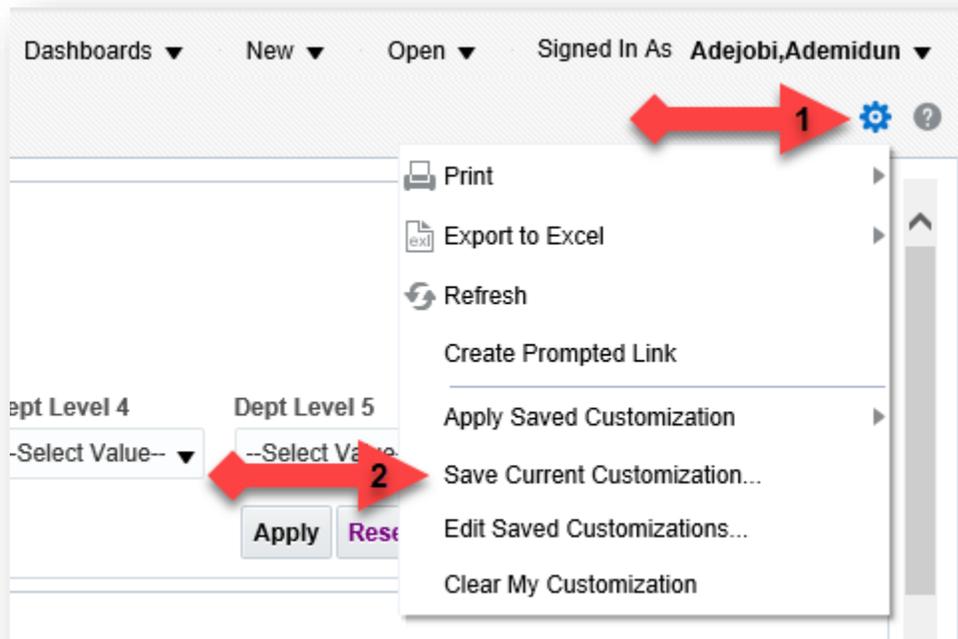
3. Enter the name for your new customization.
4. Click on the "Make this my default for this page" check box.
5. Click on the "OK" button:

Save Current Customization

Name   DeptHierarchy   **3**

Save for ● Me

○ Others Set Permissions

4 ☑ Make this my default for this page

5 OK Cancel