

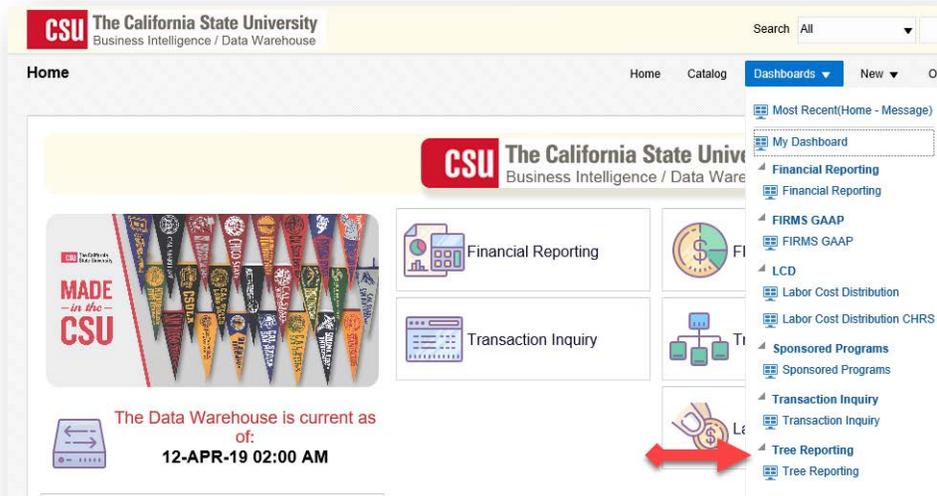
## Tree Reporting

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:



The screenshot shows the CSU Business Intelligence / Data Warehouse dashboard. The top navigation bar includes 'Home', 'Catalog', 'Dashboards', and 'New'. A sidebar on the right lists various dashboards, with 'Tree Reporting' highlighted and a red arrow pointing to it. The main content area features a 'MADE in the CSU' banner, a 'Financial Reporting' widget, and a 'Transaction Inquiry' widget. A status message indicates the data warehouse is current as of 12-APR-19 02:00 AM.

B. Select “Department Tree”:



The screenshot shows the 'Tree Reporting' page. At the top, it says '\*\* All Filters/Prompts are Fdescr (Field + Description) \*\*'. Below this, a list of tree types is displayed: 'Department Tree', 'Fund Tree', 'Account Tree', 'Project Tree', 'Program Tree', and 'Class Tree'. A red arrow points to 'Department Tree'.

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

The screenshot shows the 'Tree Reporting' interface with the 'Department Tree' tab selected. The 'SETID' dropdown menu is open, and a red arrow points to the downward-pointing arrow on the right side of the dropdown box. Other visible fields include 'Dept Fdescr', 'Dept Tree' (set to 'X'), and 'Dept Level 1'.

D. Click the box for “SACST”:

The screenshot shows the 'Tree Reporting' interface with the 'Department Tree' tab selected. The 'SETID' dropdown menu is open, and a red arrow points to the checkbox next to the 'SACST' option. Other visible fields include 'Dept Fdescr', 'Primary Tree Flg', 'Dept Level 1', and 'Dept Level 2'.

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

The screenshot shows the 'Tree Reporting' interface with the 'Department Tree' tab selected. The 'Primary Tree Flg' dropdown menu is highlighted with a red box. Other visible fields include 'SETID' (set to 'SACST'), 'Dept Fdescr', 'Dept Tree', 'Dept Level 1', and 'Dept Level 2'.

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

SETID: SACST  
Dept Fdescr: --Select Value--  
Primary Tree Flg: Y  
Dept Tree: --Select Value--  
Dept Level 1: --Select Value--  
Dept Level 2: --Select Value--

G. Click the box next to SAC\_DEPT\_TREE\_RS:

SETID: SACST  
Dept Fdescr: --Select Value--  
Primary Tree Flg: Y  
Dept Tree: --Select Value--  
Dept Level 1: --Select Value--  
Dept Level 2: --Select Value--

- SAC\_DEPT\_TREE\_RS
- SAC\_DEPT\_TREE\_RS\_JUL2010
- SAC\_DEPT\_TREE\_RS\_JUL2011
- SAC\_DEPT\_TREE\_RS\_JUL2012
- SAC\_DEPT\_TREE\_RS\_JUL2013
- SAC\_DEPT\_TREE\_RS\_JUL2014

Search...

H. Click the “Apply” button:

Tree Reporting

Home Catalog Dashboards New Open Signed In As Adejobi,Ademidun

Trees Home Department Tree

SETID: SACST  
Dept Fdescr: --Select Value--  
Primary Tree Flg: Y  
Dept Tree: SAC\_DEPT\_Tf  
Dept Level 1: --Select Value--  
Dept Level 2: --Select Value--  
Dept Level 3: --Select Value--  
Dept Level 4: --Select Value--  
Dept Level 5: --Select Value--

Apply Reset

I. Sample Output:

The screenshot shows a web application interface for 'Tree Reporting'. At the top, there are navigation links: Home, Catalog, Dashboards, New, Open, and a user profile 'Signed In As Adejobi,Ademidun'. Below the navigation is a breadcrumb trail: 'Trees Home' > 'Department Tree'. The main content area contains a filter section with dropdown menus for 'SETID' (SACST), 'Dept Fdescr' (--Select Value--), 'Primary Tree Fig' (Y), 'Dept Tree' (SAC\_DEPT\_TF), and five 'Dept Level' filters (Level 1-5, all set to --Select Value--). There are 'Apply' and 'Reset' buttons. Below the filters is a section titled 'Department Tree' with a timestamp 'Time run: 4/12/2019 9:24:26 PM'. A table displays the results of the report.

SETID	Dept Tree Name	Dept Level 1 Fdescr	Dept Level 2 Fdescr	Dept Level 3 Fdescr	Dept Level 4 Fdescr	Dept Level 5 Fdescr	Dept Fdescr
SACST	SAC_DEPT_TREE_RS	CSUS_DEPTS - CSUS Departments	D_ACADEMIC_AFF - Academic Affairs	PC_COLL_OF_ARTS_LTRS - College of Arts & Letters	PC_COLL_OF_ARTS_LTRS - College of Arts & Letters	PC_COLL_OF_ARTS_LTRS - College of Arts & Letters	14600 - College of Arts and Letters 14700 - Arts and Ltrs Developmt Dir 14900 - Intensive Learn Exp 15000 - World Languages - Literatures 15100 - English 15101 - Writing Across the Curriculum 15200 - Communication Studies 15300 - Philosophy 15400 - Humanities 15500 - History 15600 - A and L ITC Support

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:

**Department Tree**  
Time run: 4/12/2019 9:24:26 PM

SETID	Dept Tree Name	Dept Level 1 Fdescr	Dept Level 2 Fdescr	Dept Level 3 Fdescr
SACST	SAC_DEPT_TREE_RS	CSUS_DEPTS - CSUS Departments	D_ACADEMIC_AFF - Academic Affairs	PC_COLL_OF_ARTS_LTRS - College of Arts & Letters

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

**Department Tree**  
Time run: 4/12/2019 9:24:26 PM

SETID	Dept Tree Name	Dept Level 1 Fdescr	Dept Level 2 Fdescr	Dept Level 3 Fdescr
SACST	SAC_DEPT_TREE_RS	CSUS_DEPTS - CSUS Departments	D_ACADEMIC_AFF - Academic Affairs	PC_COLL_OF_ARTS_LTRS - College of Arts & Letters

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

**Department Tree**  
Time run: 4/12/2019 9:24:26 PM

SETID	Dept Tree Name	Dept Level 1 Fdescr	Dept Level 2 Fdescr	Dept Level 3 Fdescr
SACST	SAC_DEPT_TREE_RS	CSUS_DEPTS - CSUS Departments	D_ACADEMIC_AFF - Academic Affairs	PC_COLL_OF_ARTS_LTRS - College of Arts & Letters

SETID ▶
 

- ↕ Sort Column ▶
- Exclude column
- Move Column ▶



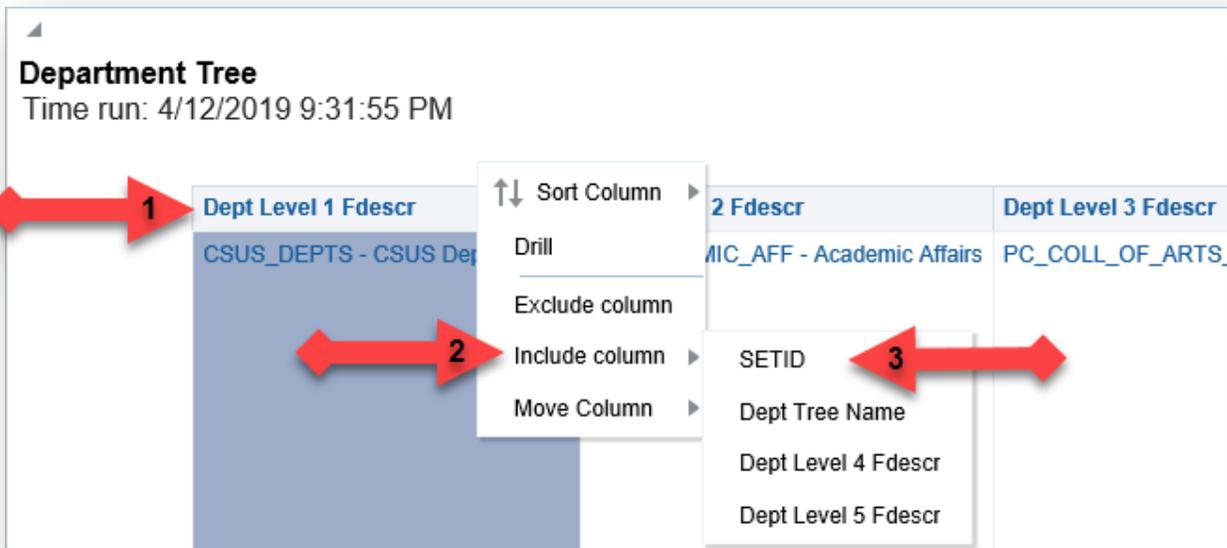
C. In this example report, I excluded 4 columns:

**Department Tree**  
Time run: 4/12/2019 9:31:55 PM

Dept Level 1 Fdescr	Dept Level 2 Fdescr	Dept Level 3 Fdescr	Dept Fdescr
CSUS_DEPTS - CSUS Departments	D_ACADEMIC_AFF - Academic Affairs	PC_COLL_OF_ARTS_LTRS - College of Arts & Letters	14600 - College of Arts and Letters
			14700 - Arts and Ltrs Developmt Dir
			14900 - Intensive Learn Exp
			15000 - World Languages - Literatures
			15100 - English

You can add the column back:

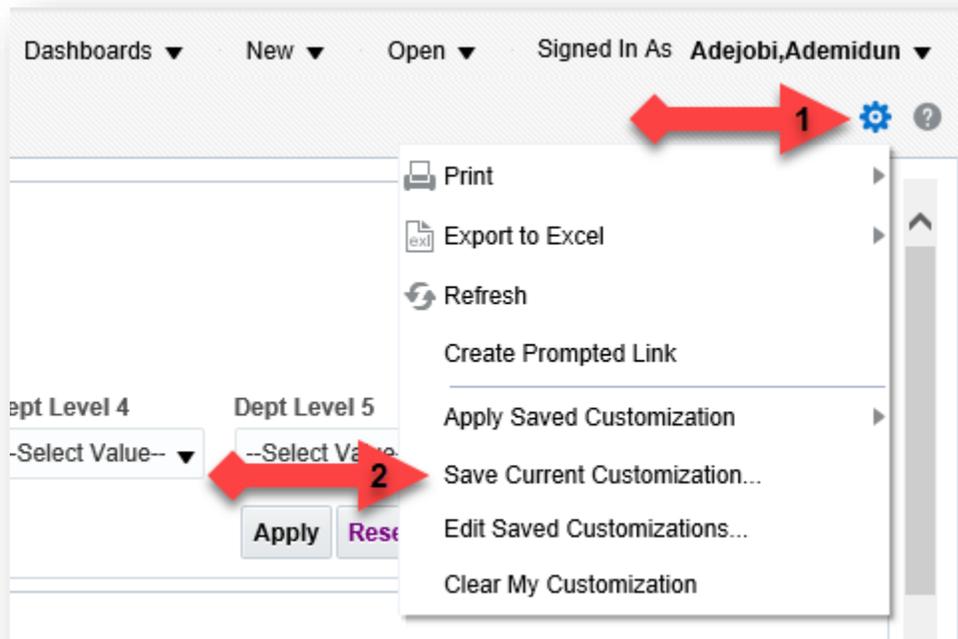
1. Right-click any column header
2. Click on "Include column"
3. Click on the column to be included. The following example includes the SETID back into the report.



**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:

