

## 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).

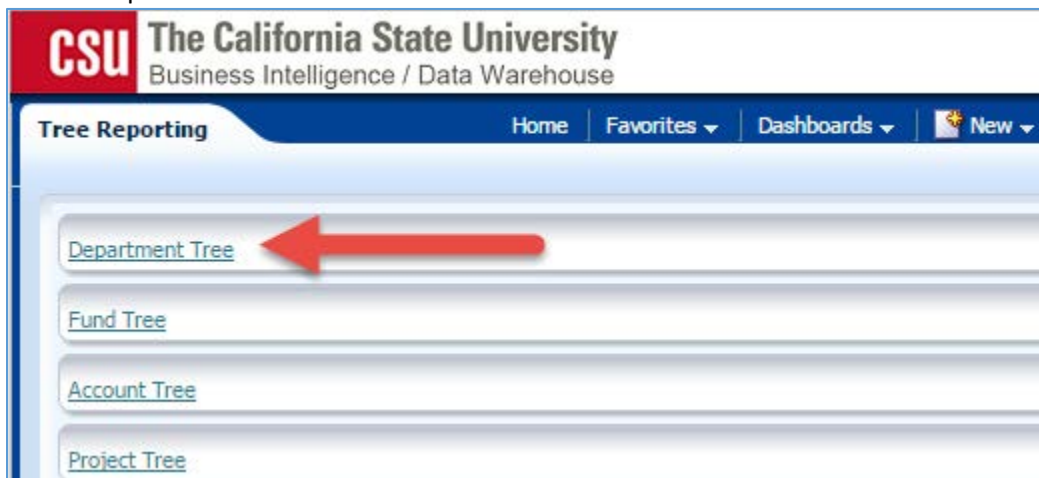
Assumptions:

- 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":

The screenshot shows the 'Tree Reporting' application window with a 'Home' button in the top right. Below the title bar, there is a search icon. The main area contains several dropdown menus: 'SETID' (with a red arrow pointing to its arrow), 'Dept Fdescr', 'Dept Tree' (with the value 'X'), and 'Dept Level 1'.

D. Click the box for "SACST":

The screenshot shows the 'Tree Reporting' application with a search dropdown menu open. The menu contains two options: '-' and 'SACST'. A red arrow points to the 'SACST' option. Other dropdown menus visible include 'SETID', 'Dept Fdescr', 'Primary Tree Flg' (with value 'Y'), 'Dept Level 1', and 'Dept Level 2'. A 'Search...' input field is at the bottom of the dropdown menu.

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

The screenshot shows the 'Tree Reporting' application with the 'Primary Tree Flg' dropdown menu highlighted by a red box. The value 'Y' is visible in the dropdown. Other dropdown menus include 'SETID' (with value 'SACST'), 'Dept Fdescr', 'Dept Tree', 'Dept Level 1', and 'Dept Level 2'.

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

<b>SETID</b>	<b>Dept Fdescr</b>	<b>Primary Tree Flg</b>
SACST	--Select Value--	Y
<b>Dept Tree</b>	<b>Dept Level 1</b>	<b>Dept Level 2</b>
--Select Value--	--Select Value--	--Select Value--

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

<b>SETID</b>	<b>Dept Fdescr</b>	<b>Primary Tree Flg</b>
SACST	--Select Value--	Y
<b>Dept Tree</b>	<b>Dept Level 1</b>	<b>Dept Level 2</b>
--Select Value--	--Select Value--	--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  
 SAC\_DEPT\_TREE\_RS\_JUL2015  
 SAC\_DEPT\_TREE\_RS\_JUL2016

H. Click the "Apply" button:

<b>Tree Reporting</b>						Home	Catalog	Dashboards	New	Open	Signed In As Eyster,
<b>SETID</b>	<b>Dept Fdescr</b>	<b>Primary Tree Flg</b>									
SACST	--Select Value--	Y									
<b>Dept Tree</b>	<b>Dept Level 1</b>	<b>Dept Level 2</b>	<b>Dept Level 3</b>	<b>Dept Level 4</b>	<b>Dept Level 5</b>						
SAC_DEPT_TREE	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--						
					Apply						

I. Sample Output:

SETID: SACST    Dept Fdescr: --Select Value--    Primary Tree Flg: Y  
 Dept Tree: SAC\_DEPT\_TREE    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

**Department Tree**  
Time run: 2/13/2018 8:05:05 AM

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 -

Tree Reporting: Trees Home > Tree Reporting: Department Tree

**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: 10/21/2015 10:53:25 AM

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: 10/21/2015 10:53:25 AM

SETID	Dept Tree Name	Dept Level 1 Fdescr	Dept Level 2 Fdescr	Dept Level 3 Fdescr
SA		CSUS_DEPTS - CSUS Departments	D_ACADEMIC_AFF - Academic Affairs	PC_COLL_OF College of Art

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

Department Tree  
Time run: 11/3/2015 10:31:18 AM

SETID	Dept Tree Name	Dept Level 1 Fdescr	Dept Level 2 Fdescr
SACST	SAC_DEPT_TREE_RS	CSUS_DEPTS - CSUS Departments	D_ACADEMIC_AFF - Academic Affairs

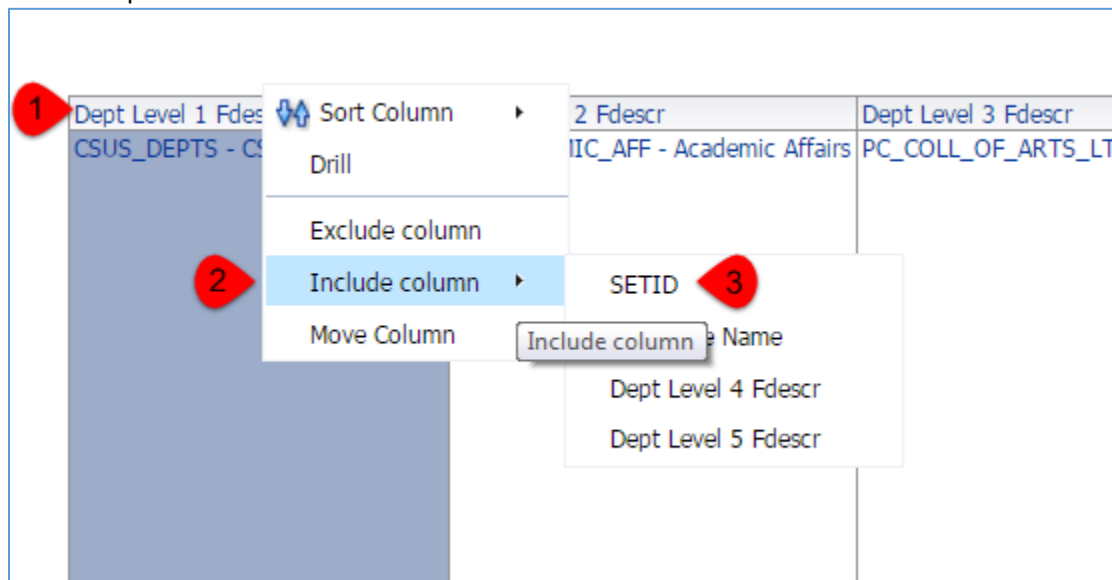
C. In this example report, I excluded 4 columns:

Department Tree  
Time run: 10/21/2015 11:18:36 AM

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 - Foreign Languages
			15100 - English

You can add the column back:

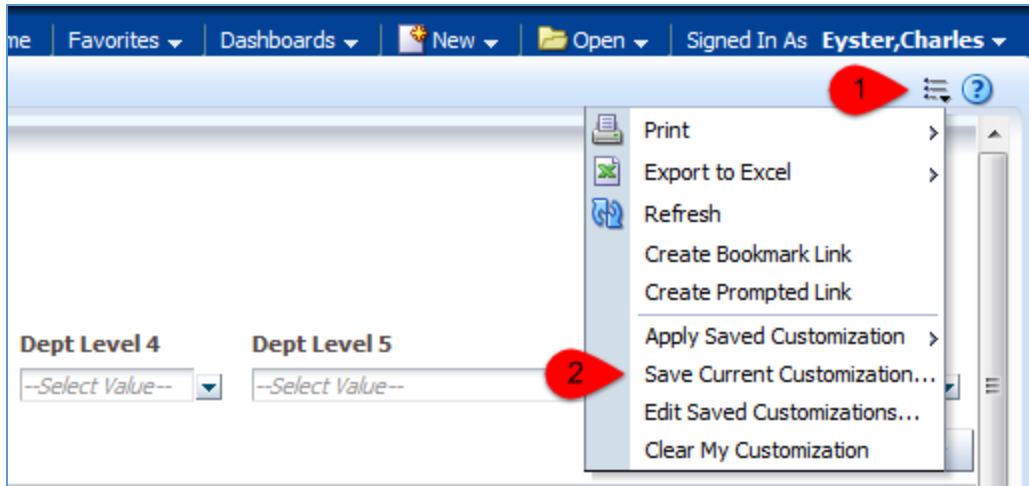
1. Right-click any column header
2. Click on "Include column"
3. Click on the column to be included. The following example includes the SETID back into the report.



### 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 "hamburger" 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:

