

Financials Upgrade Tree Maintenance Instructions

Financial Tree Maintenance

To assist in creating new trees when one already exists, it may be helpful to refer to the OBD_019 query series in PeopleSoft 7.02. Since this query identifies values on the current tree, it may be easier to update this information than to create a new tree in its entirety. Also, printing a copy of the current tree report may help visualize the changes that need to be made (Go -> Process Financial Information -> Custom Budget Reports -> Tree Printing Report).

Agencies are required to submit a BCM_FUND_SOURCE tree that will be entered into 8.8. Any major tree restructuring will need to be submitted in 7.02 and 8.8. Please specify the PeopleSoft version (7.02 or 8.8) for each tree request.

Below are instructions for completing the Financial Tree Maintenance form:

Name and Phone:

The person requesting the value(s) to be added to the tree should include their name and telephone number in cell (B2). This information is important if questions or verification of submitted request is required from the GTA Tree Maintenance group.

Business Unit:

Column A has been designated for the Business Unit.

Tree Name:

Column B is used to specify the tree where the value is to be added.

Value to be added:

Column C is for the value (Child) being added. The Org, Funding Source or Project chartfield value is entered in this column.

Level Name:

Column D is used to identify the level on the tree where the new value is to be added.

Parent:

Column E is used to indicate the parent of the new value. This is the roll-up level and must be one level higher than the child.

Always verify the values to be added are in PeopleSoft – Design Chartfields. Email the completed form to trees@gtga.gov . Once Financial Systems has completed your request, review your tree to verify its accuracy.

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If you have any questions about your financial trees, please contact the Financial Systems Help Desk at (404) 657-3956 or (888) 896-7771.