New Fiscal Year Budget Tree Update Request

1. Run the **0BD019** query to excel for tree that requires an update. (ex. BCM_ORG is the 0BD019A)

☐	0BD019A_ANY_ORG_TREE	0BD019A_ANY_ORG_TREE	Public		Edit	HTML	Excel
☐	0BD019B_ANY_PROJECT_TREE	0BD019B_ANY_PROJECT_TREE	Public		Edit	HTML	Excel
☐	0BD019C_ANY_FUND_SRC_TREE	0BD019C_ANY_FUND_SRC_TREE	Public		Edit	HTML	Excel

0BD019A_ANY_ORG_TREE - 0BD019A_ANY_ORG_TREE

SetID 40000
Tree Name BCM_ORG
View Results

Row	SetID	Tree	Child

	A	B	C	D	E	F	G
1	0BD019A_ANY_ORG_TREE	48					
2	SetID	Tree	Child	Tree Level	Level	Parent	Child Descr
3	40000	BCM_ORG	40011101	4	BD_DETAIL	400B111	Executive Office
4	40000	BCM_ORG	40011102	4	BD_DETAIL	400B111	Policy Development
5	40000	BCM_ORG	40011103	4	BD_DETAIL	400B111	Eeoc, Charities And Awards
6	40000	BCM_ORG	40011104	4	BD_DETAIL	400B111	Fair Employment Practices
7	40000	BCM_ORG	40011105	4	BD_DETAIL	400B111	Strategic Development
8	40000	BCM_ORG	40013502	4	BD_DETAIL	400B135	Administration, Flexible Benef
9	40000	BCM_ORG	40013503	4	BD_DETAIL	400B135	Departmental Processing
10	40000	BCM_ORG	40013504	4	BD_DETAIL	400B135	Spending Account Processing
11	40000	BCM_ORG	40013601	4	BD_DETAIL	400B136	Ce
12	40000	BCM_ORG	40013602	4	BD_DETAIL	400B136	Description Not Found
13	40000	BCM_ORG	40013604	4	BD_DETAIL	400B136	Refunds & Audits
14	40000	BCM_ORG	40013605	4	BD_DETAIL	400B136	Customer Service
15	40000	BCM_ORG	40013606	4	BD_DETAIL	400B136	Health Review Services
16	40000	BCM_ORG	40014701	4	BD_DETAIL	400B147	Administration
17	40000	BCM_ORG	40014702	4	BD_DETAIL	400B147	Health Benefit Accounting
18	40000	BCM_ORG	40014703	4	BD_DETAIL	400B147	Accounting And Audit Services
19	40000	BCM_ORG	40014704	4	BD_DETAIL	400B147	Internal Audits
20	40000	BCM_ORG	40014705	4	BD_DETAIL	400B147	Deferred Compensation
21	40000	BCM_ORG	40014801	4	BD_DETAIL	400B148	Administration

2. As a guide in creating new trees it is important to understand the parent/child relationship, the appropriate tree level number, and level name for each value.

   Reviewing the trees in the "Tree Viewer" would allow you to see the tree's structure and the placement of each chartfield.

You can view the level name for each chartfield by:

a. Navigate: **Tree Manager → Tree Viewer**
b. Select the "Search by" drop down menu and select "SetID".
c. Enter your Business Unit, then select "Search".
d. Choose the appropriate tree from the list.
e. Select the hyperlink "Display Options" and click the "Display Levels" checkbox.
f. Select "Update" and then click on "Expand All" (the plus sign next to the chartfield) to expand just one level at a time.

Tree Viewer

SetID	40000	Last Audit	Valid Tree
Effective Date	01/01/1950	Status	Active
Tree Name	BCM_ORG		400 BCM Org Tree

Close   Display Options Print Format

Collapse All | Expand All   Find   First Page ◄ 49 of 49 ► Last Page

400ALL - All Orgs   Level :ALL
    400A11 - Executive Offices   Level :BD_APPROP
        400B111 - Executive Offices   Level :BD_ORG
            40011101 - Executive Office   Level :BD_DETAIL
            40011102 - Policy Development   Level :BD_DETAIL
            40011103 - Eeoc, Charities And Awards   Level :BD_DETAIL
            40011104 - Fair Employment Practices   Level :BD_DETAIL
            40011105 - Strategic Development   Level :BD_DETAIL
    400A13 - Employee Benefits   Level :BD_APPROP
        400B135 - Flexible Benefits   Level :BD_ORG
            40013502 - Administration, Flexible Benef   Level :BD_DETAIL
            40013503 - Departmental Processing   Level :BD_DETAIL
            40013504 - Spending Account Processing   Level :BD_DETAIL
        400B136 - Health Benefits   Level :BD_ORG
            40013601 - Ce   Level :BD_DETAIL
            40013602 - Description Not Found   Level :BD_DETAIL
            40013604 - Refunds & Audits   Level :BD_DETAIL
            40013605 - Customer Service   Level :BD_DETAIL
            40013606 - Health Review Services   Level :BD_DETAIL

3. Analyze existing tree structure and determine where **updates** need to be made.

Tree Viewer

SetID	40000	Last Audit	Valid Tree
Effective Date	01/01/1950	Status	Active
Tree Name	BCM_ORG		400 BCM Org Tree

Close   Display Options Print Format

Collapse All | Expand All   Find   First Page ◄ 49 of 49 ► Last Page

400ALL - All Orgs   Level :ALL
    400A11 - Executive Offices   Level :BD_APPROP
        400B111 - Executive Offices   Level :BD_ORG
            40011101 - Executive Office   Level :BD_DETAIL
            40011102 - Policy Development   Level :BD_DETAIL
            ~~40011103 - Eeoc, Charities And Awards   Level :BD_DETAIL~~   delete
            40011104 - Fair Employment Practices   Level :BD_DETAIL
            ~~40011105 - Strategic Development   Level :BD_DETAIL~~   delete
    400A13 - Employee Benefits   Level :BD_APPROP
        400B135 - Flexible Benefits   Level :BD_ORG
            40013502 - Administration, Flexible Benef   Level :BD_DETAIL
            40013503 - Departmental Processing   Level :BD_DETAIL
            40013504 - Spending Account Processing   Level :BD_DETAIL
        400B136 - Health Benefits   Level :BD_ORG
            40013601 - Ce   Level :BD_DETAIL
            40013602 - Description Not Found   Level :BD_DETAIL
            40013604 - Refunds & Audits   Level :BD_DETAIL
            40013605 - Customer Service   Level :BD_DETAIL   move to 400B111
            40013606 - Health Review Services   Level :BD_DETAIL

4. Make updates to 0BD019 Spreadsheet.

SetID	Tree	Child	Tree Level	Level	Parent	Child Descr
0BD019A_ANY_ORG_TREE	48					
40000	BCM_ORG	40011101	4	BD_DETAIL	400B111	Executive Office
40000	BCM_ORG	40011102	4	BD_DETAIL	400B111	Policy Development
40000	BCM_ORG	40011104	4	BD_DETAIL	400B111	Fair Employment Practices
40000	BCM_ORG	40013502	4	BD_DETAIL	400B135	Administration, Flexible Benef
40000	BCM_ORG	40013503	4	BD_DETAIL	400B135	Departmental Processing
40000	BCM_ORG	40013504	4	BD_DETAIL	400B135	Spending Account Processing
40000	BCM_ORG	40013601	4	BD_DETAIL	400B136	Ce
40000	BCM_ORG	40013602	4	BD_DETAIL	400B136	Description Not Found
40000	BCM_ORG	40013604	4	BD_DETAIL	400B136	Refunds & Audits
40000	BCM_ORG	40013605	4	BD_DETAIL	400B111	Customer Service
40000	BCM_ORG	40013606	4	BD_DETAIL	400B136	Health Review Services
40000	BCM_ORG	40014701	4	BD_DETAIL	400B147	Administration
40000	BCM_ORG	40014702	4	BD_DETAIL	400B147	Health Benefit Accounting
40000	BCM_ORG	40014703	4	BD_DETAIL	400B147	Accounting And Audit Services
40000	BCM_ORG	40014704	4	BD_DETAIL	400B147	Internal Audits
40000	BCM_ORG	40014705	4	BD_DETAIL	400B147	Deferred Compensation
40000	BCM_ORG	40014801	4	BD_DETAIL	400B148	Administration
40000	BCM_ORG	40014802	4	BD_DETAIL	400B148	General Services

5. Add new values if applicable.

Tree Viewer

SetID   40000   Last Audit   Valid Tree

Effective Date   01/01/1950   Status   Active

Tree Name   BCM_ORG   400 BCM Org Tree

Close   Display Options   Print Format

Collapse All | Expand All   Find   First Page   49 of 49   Last Page

📂 400ALL - All Orgs   Level :ALL
    📂 400A11 - Executive Offices   Level :BD_APPROP
       📂 400B111 - Executive Offices   Level :BD_ORG
         📂 40011101 - Executive Office   Level :BD_DETAIL
         📂 40011102 - Policy Development   Level :BD_DETAIL
         📂 40011103 - Fees, Charities And Awards   Level :BD_DETAIL   delete
         📂 40011104 - Fair Employment Practices   Level :BD_DETAIL
         📂 40011105 - Strategic Development   Level :BD_DETAIL   delete
    📂 400A13 - Employee Benefits   Level :BD_APPROP
       📂 400B135 - Flexible Benefits   Level :BD_ORG
         📂 40013502 - Administration, Flexible Benef   Level :BD_DETAIL
         📂 40013503 - Departmental Processing   Level :BD_DETAIL
         📂 40013504 - Spending Account Processing   Level :BD_DETAIL
       📂 400B136 - Health Benefits   Level :BD_ORG   Add 40013505
         📂 40013601 - Ce   Level :BD_DETAIL
         📂 40013602 - Description Not Found   Level :BD_DETAIL
         📂 40013604 - Refunds & Audits   Level :BD_DETAIL
         📂 40013605 - Customer Service   Level :BD_DETAIL   move to 400B111
         📂 40013606 - Health Review Services   Level :BD_DETAIL

0BD019A_ANY_ORG_TREE	48					
SetID		Tree	Child	Tree Level	Level	Parent	Child Descr
40000		BCM_ORG	40011101	4	BD_DETAIL	400B111	Executive Office
40000		BCM_ORG	40011102	4	BD_DETAIL	400B111	Policy Development
40000		BCM_ORG	40011104	4	BD_DETAIL	400B111	Fair Employment Practices
40000		BCM_ORG	40013502	4	BD_DETAIL	400B135	Administration, Flexible Benef
40000		BCM_ORG	40013503	4	BD_DETAIL	400B135	Departmental Processing
40000		BCM_ORG	40013504	4	BD_DETAIL	400B135	Spending Account Processing
40000		BCM_ORG	40013505	4	BD_DETAIL	400B135	TEST BUDGET ADD
40000		BCM_ORG	40013601	4	BD_DETAIL	400B136	Ce
40000		BCM_ORG	40013602	4	BD_DETAIL	400B136	Description Not Found
40000		BCM_ORG	40013604	4	BD_DETAIL	400B136	Refunds & Audits
40000		BCM_ORG	40013605	4	BD_DETAIL	400B111	Customer Service
40000		BCM_ORG	40013606	4	BD_DETAIL	400B136	Health Review Services
40000		BCM_ORG	40014701	4	BD_DETAIL	400B147	Administration
40000		BCM_ORG	40014702	4	BD_DETAIL	400B147	Health Benefit Accounting

6. Any new value needs to be added to PeopleSoft TeamWorks.
   a. Navigate: **Set Up Financials/Supply Chain → Common Definitions → Design ChartFields → Define Values → ChartField Values**
   b. Select the appropriate ChartField type.
   c. Click "Add a New Value" tab.

Department

| Find an Existing Value | **Add a New Value** |

*SetID 40000

*Department 400B13505

   d. Add SetID and Value
   e. Complete Required Fields.

Department

SetID 40000   Department 400B13505

| Effective Date | | | | | 1 of 1 | | | View All |

*Effective Date 01/01/1900   Attributes   Long Description   ☐ Budgetary Only

*Status Active

*Description TEST BUDGET ADD

*Short Description TBA

Manager ID   Manager Name

Company

| Save | Notify | | Add | Update/Display | Include History | Correct History |

   f. Click "Save"

7. Submit email request to SAO (FSCM@SAO.GA.GOV) for processing. Attach modified 0BD019 query and tree maintenance request form if applicable. (See note below)
   Subject Line: FY20XX NEW BUDGET TREE REQUEST

0BD019A_ANY_ORG_TREE	48					
SetID	Tree	Child	Tree Level	Level	Parent	Child Descr
40000	BCM_ORG	40011101	4	BD_DETAIL	400B111	Executive Office
40000	BCM_ORG	40011102	4	BD_DETAIL	400B111	Policy Development
40000	BCM_ORG	40011104	4	BD_DETAIL	400B111	Fair Employment Practices
40000	BCM_ORG	40013502	4	BD_DETAIL	400B135	Administration, Flexible Benef
40000	BCM_ORG	40013503	4	BD_DETAIL	400B135	Departmental Processing
40000	BCM_ORG	40013504	4	BD_DETAIL	400B135	Spending Account Processing
40000	BCM_ORG	40013505	4	BD_DETAIL	400B135	TEST BUDGET ADD
40000	BCM_ORG	40013601	4	BD_DETAIL	400B136	Ce
40000	BCM_ORG	40013602	4	BD_DETAIL	400B136	Description Not Found
40000	BCM_ORG	40013604	4	BD_DETAIL	400B136	Refunds & Audits
40000	BCM_ORG	40013605	4	BD_DETAIL	400B111	Customer Service
40000	BCM_ORG	40013606	4	BD_DETAIL	400B136	Health Review Services
40000	BCM_ORG	40014701	4	BD_DETAIL	400B147	Administration
40000	BCM_ORG	40014702	4	BD_DETAIL	400B147	Health Benefit Accounting
40000	BCM_ORG	40014703	4	BD_DETAIL	400B147	Accounting And Audit Services
40000	BCM_ORG	40014704	4	BD_DETAIL	400B147	Internal Audits
40000	BCM_ORG	40014705	4	BD_DETAIL	400B147	Deferred Compensation
40000	BCM_ORG	40014801	4	BD_DETAIL	400B148	Administration
40000	BCM_ORG	40014802	4	BD_DETAIL	400B148	General Services
40000	BCM_ORG	40014803	4	BD_DETAIL	400B148	Tion
40000	BCM_ORG	40014804	4	BD_DETAIL	400B148	Payroll Certification
40000	BCM_ORG	40014805	4	BD_DETAIL	400B148	Contracts & Procurement

PLEASE NOTE: THE EXAMPLE ABOVE IS REGARDING THE BCM_ORG TREE. IF YOU ARE SUBMITTING A REQUEST FOR THE BCM_FUND_SRC TREE BE SURE TO INCLUDE THE STANDARD TREE MAINTENANCE REQEUST FORM THAT INCLUDES ANY NEW FUND SOURCE VALUES.

ALL NEW FUND SOURCE VALUE REQUIRE ADDITIONAL APPROVAL FROM SAO REPORTING.

8. SAO will respond with service request number and further tree DRAFT review and Approval as needed.

9. Once finalized, data is available for AOB budget load by agency.

QUESTIONS: SAO Customer Service Center (CSC) - Financials
404-657-3956 or 888-896-7771
fscm@sao.ga.go