U.S. Coast Guard

User Guide

Maintaining the Hierarchy Tree for the TCC Administrator Role

36555 –Travel Charge Card (TCC) Tracking,

Technology Refresh Sub-Project

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Maintaining the TCC Hierarchy Tree in Direct Access

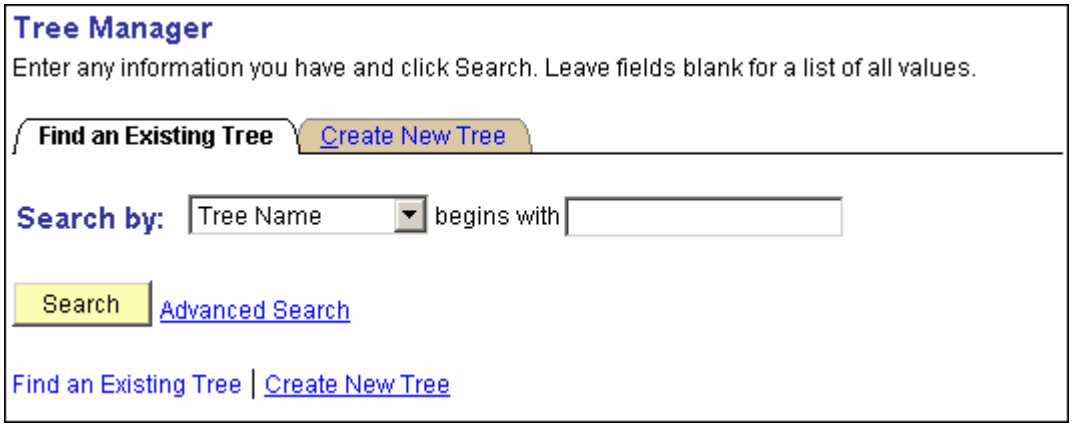
Warning! General Advisory Warning! General Advisory Warning!

- Caution is the key word when performing maintenance on Trees.
- When selecting the tree to open for maintenance, ensure that you only select and open the TCC Hierarchy Tree; Tree Name is CG_CARD_HIERARCHY.
- Vendor advises: Be extremely cautious about using the browser's Back button while in Tree Manager, as you may receive unexpected results. Save changes to your tree before using the Back button.
- Use extreme caution when making any changes to the tree.

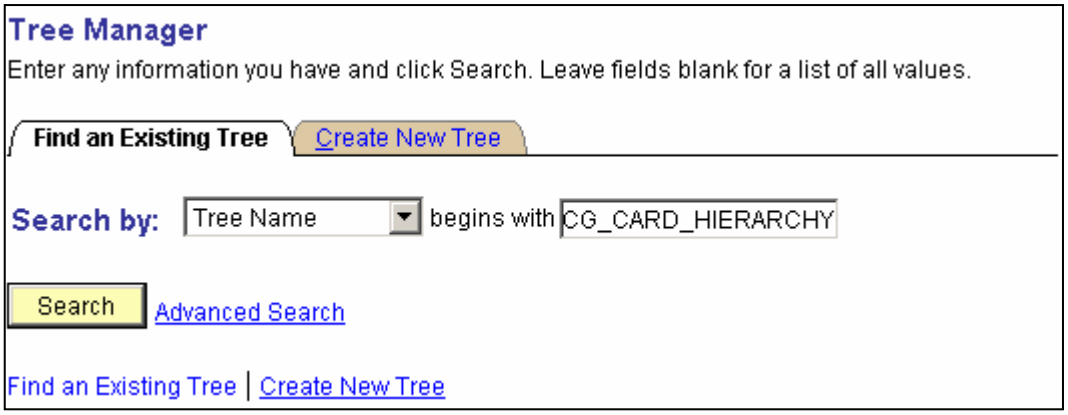
How to Access and Open the TCC Hierarchy Tree

From the Home page within Direct Acces, click on the Reporting Hierarchy Tree portal link within the Travel Charge Card Program pagelet to access the tree.

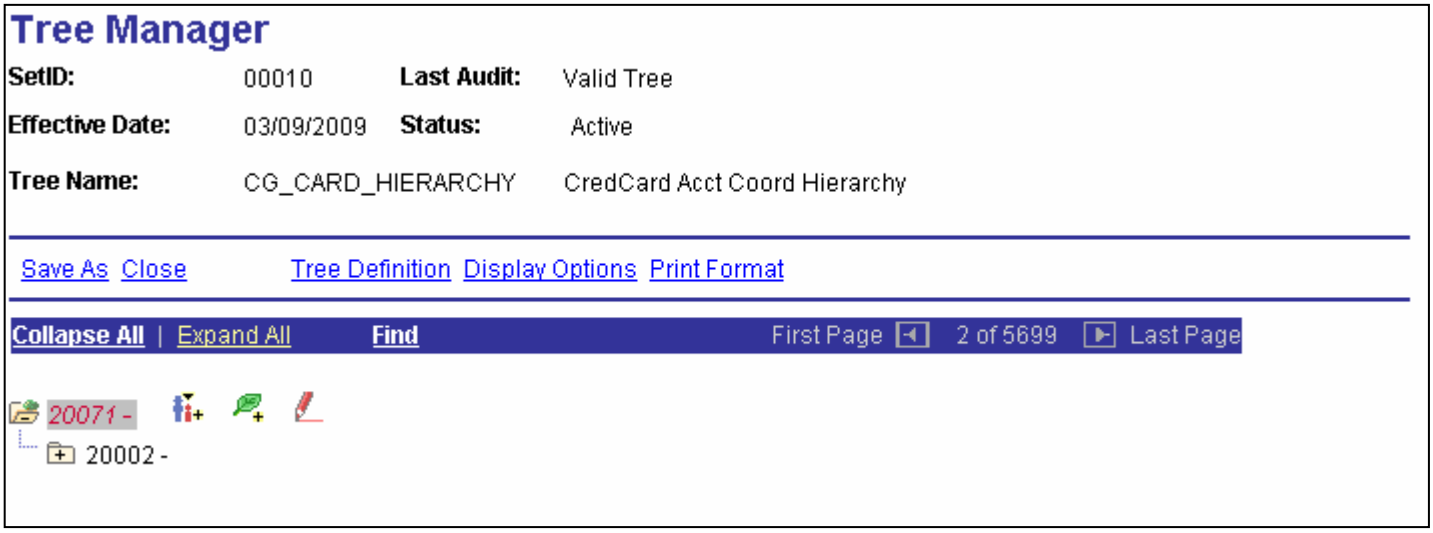
The Tree Manager Search box will be displayed.



Enter the tree name, CG_CARD_HIERARCHY, and click the Search button.
Note: You may enter a partial name, such as, cg_c and get the correct results.



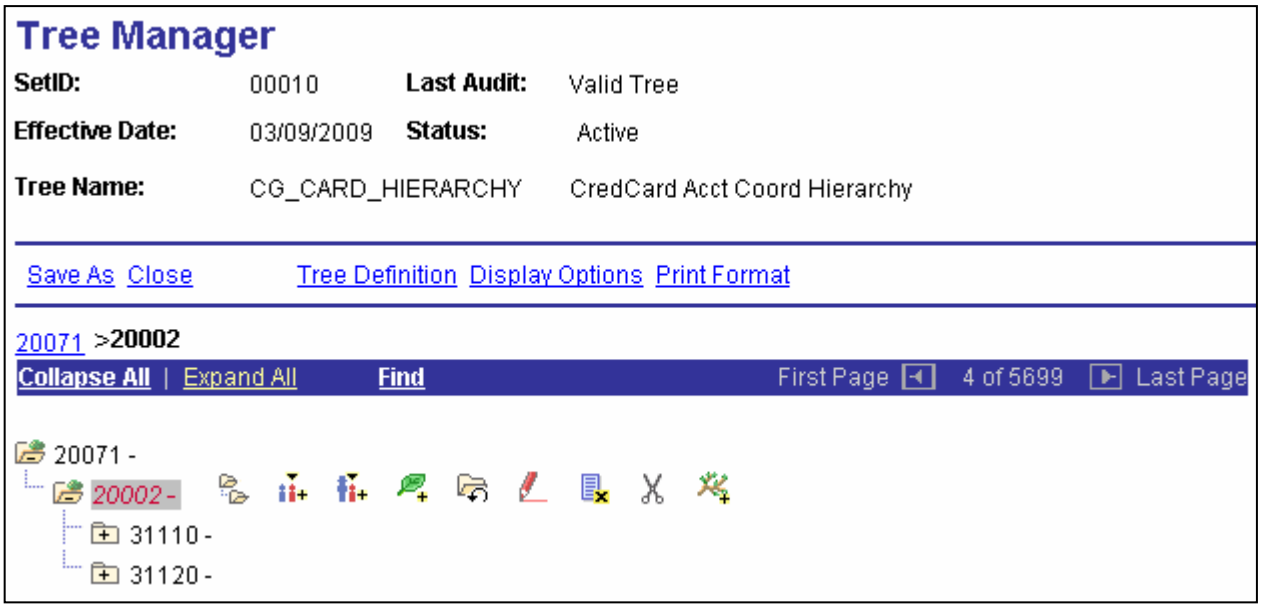
The Reporting Hierarchy Tree will open and display as follows:



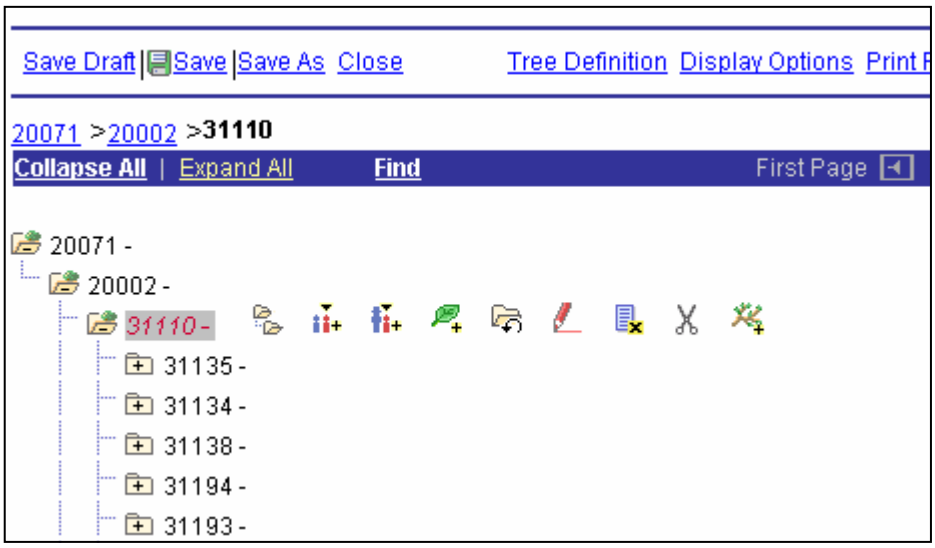
Tree Manager displays the tree with the root node expanded one level upon opening.

How to Expand a Tree Node

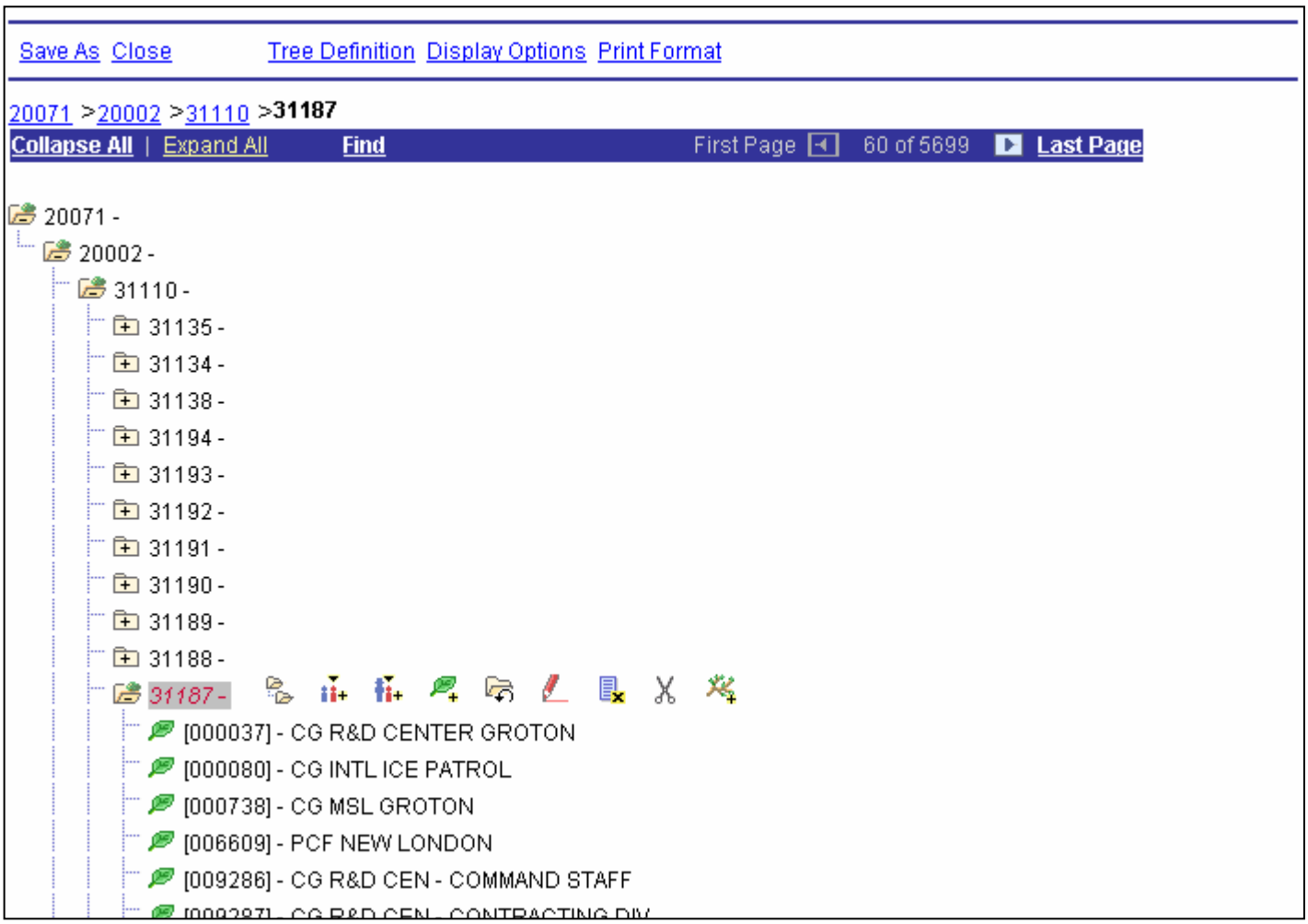
Expand the entry by clicking on the folder icon that is to the left of the 20002 parent node. This will display the original two areas (LAN and PAC) as 31110 and 31120.



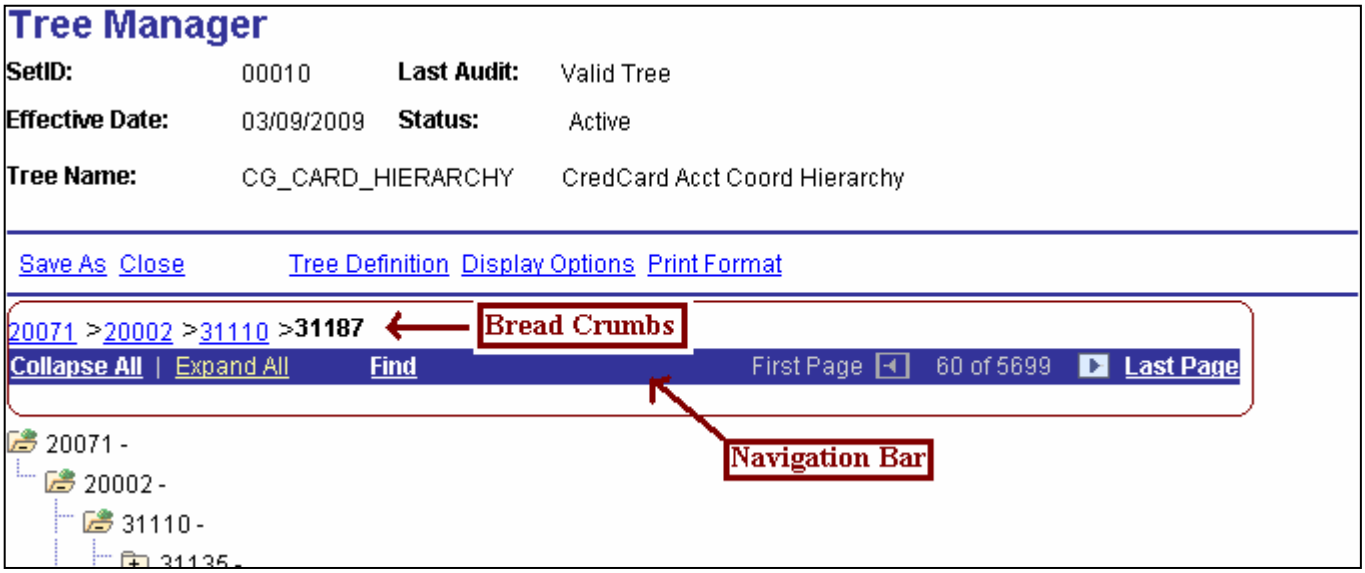
Expand Region 31110 by clicking on the icon to the left of 31110. This will display the hierarchy codes (coordinator levels) assigned to Region 31110.



Expand the next level down, Hierarchy code 31187, to view the departments assigned to the Hierarchy code (coordinator level).



Notice the bread crumbs expanding as we expand the tree. Notice the blue navigation bar.



You can collapse a node at any level to give you a better overview of the entire tree. You can collapse all levels by clicking on “Collapse All” from the navigation bar.

Navigating the Tree

You can perform the following actions on the selected tree by using the links and images on the navigation bar.

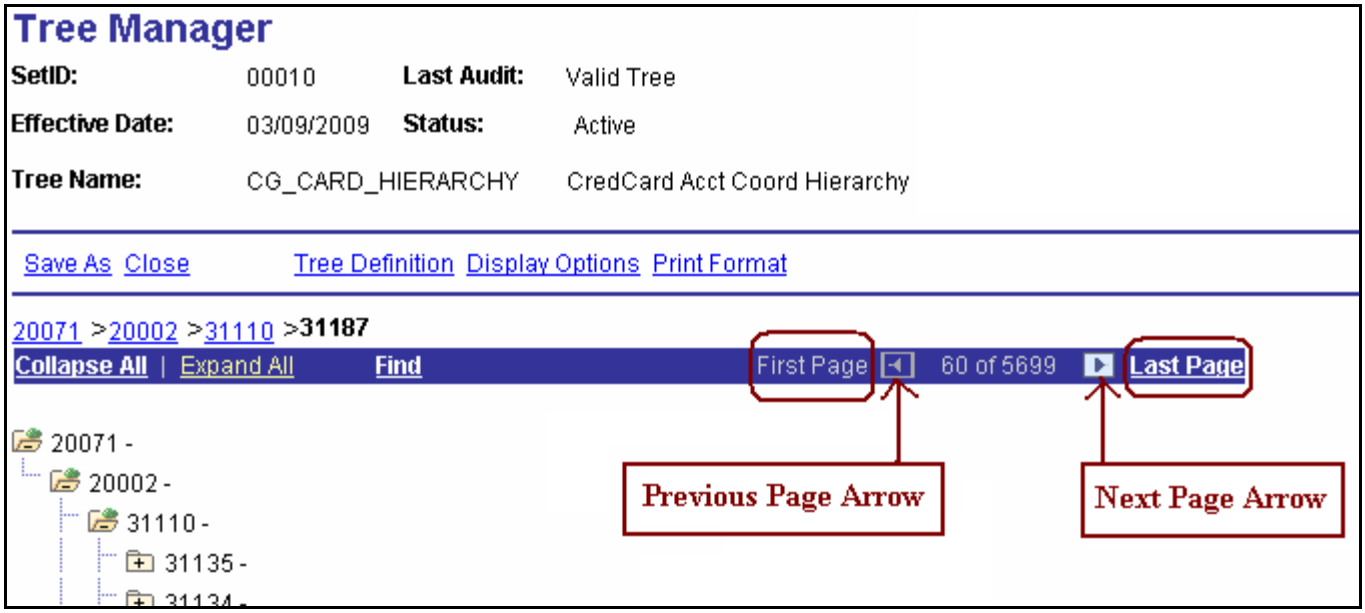
Collapse All Click this to close all of the visible nodes except for the root node. The root node is always expanded.

Expand All Click this to expand all of the nodes on the tree, so that the entire tree is visible.

This expands all the parent/child relationships, but the tree hierarchy is still presented one page at a time.

Use the Next page and Previous page arrows to move forward and backward through the tree.

Find Click this to access the Find Value page and search for nodes and detail values.



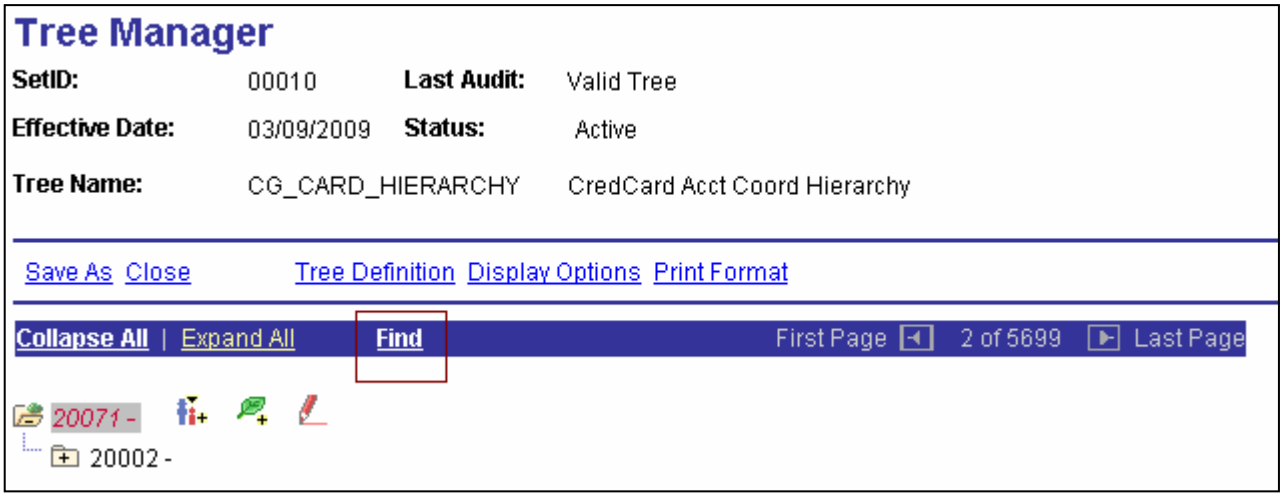
Also note the First Page and Last Page shortcut links. The Previous Page and Next Page arrows are noted above.

Using Bread Crumbs

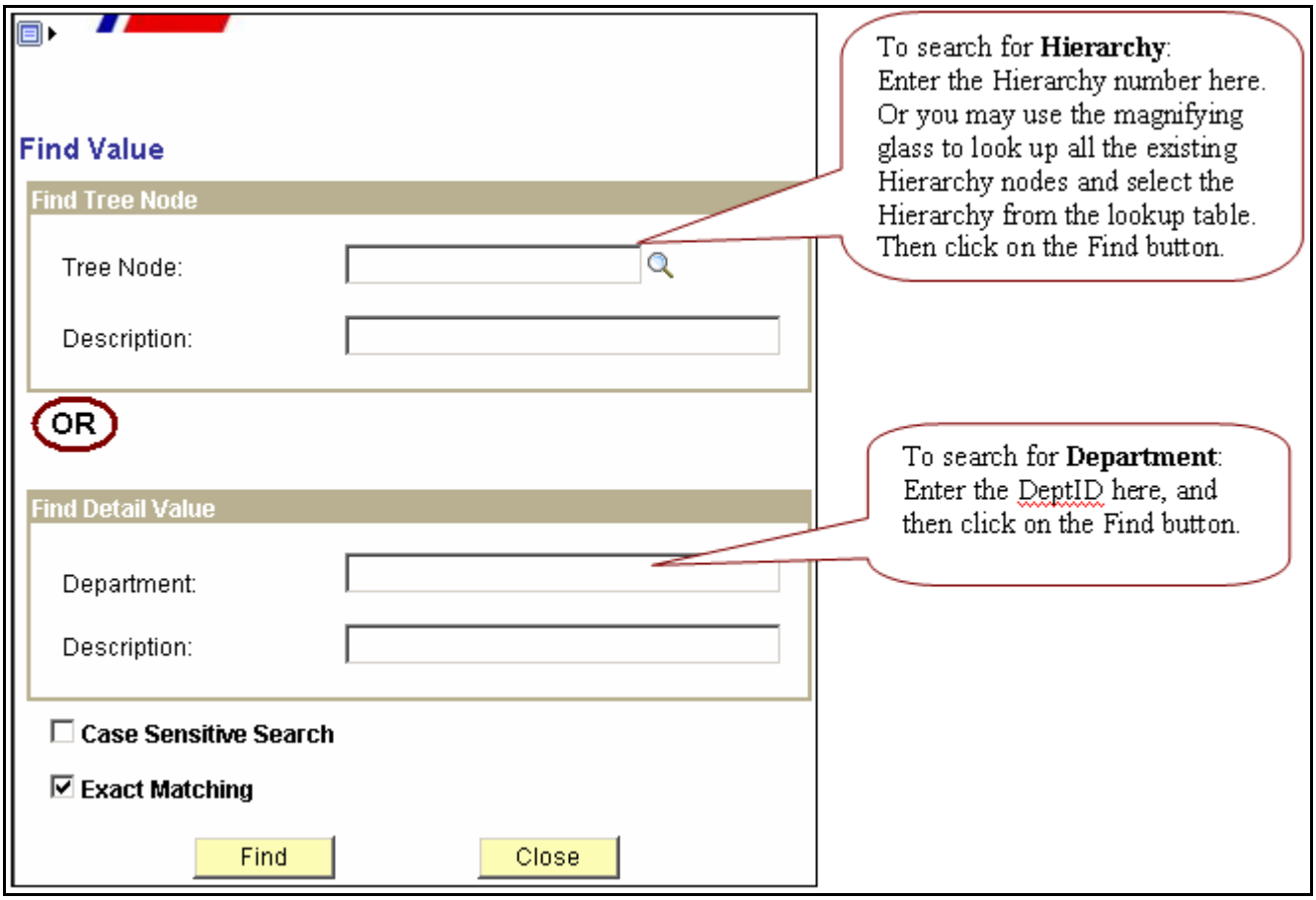
As you navigate through your tree, breadcrumbs appear above the navigation bar. They show you the parent/child relationships between the currently-selected object and its parents. Breadcrumbs can provide you with a basic map of your route through the tree and can also be used to jump back to a previously visited node or branch.

Searching for Hierarchy Nodes or Department IDs – the Find Value page

Access the Find Value page by clicking on **Find** from the navigation bar.



The Find Value page is displayed below.

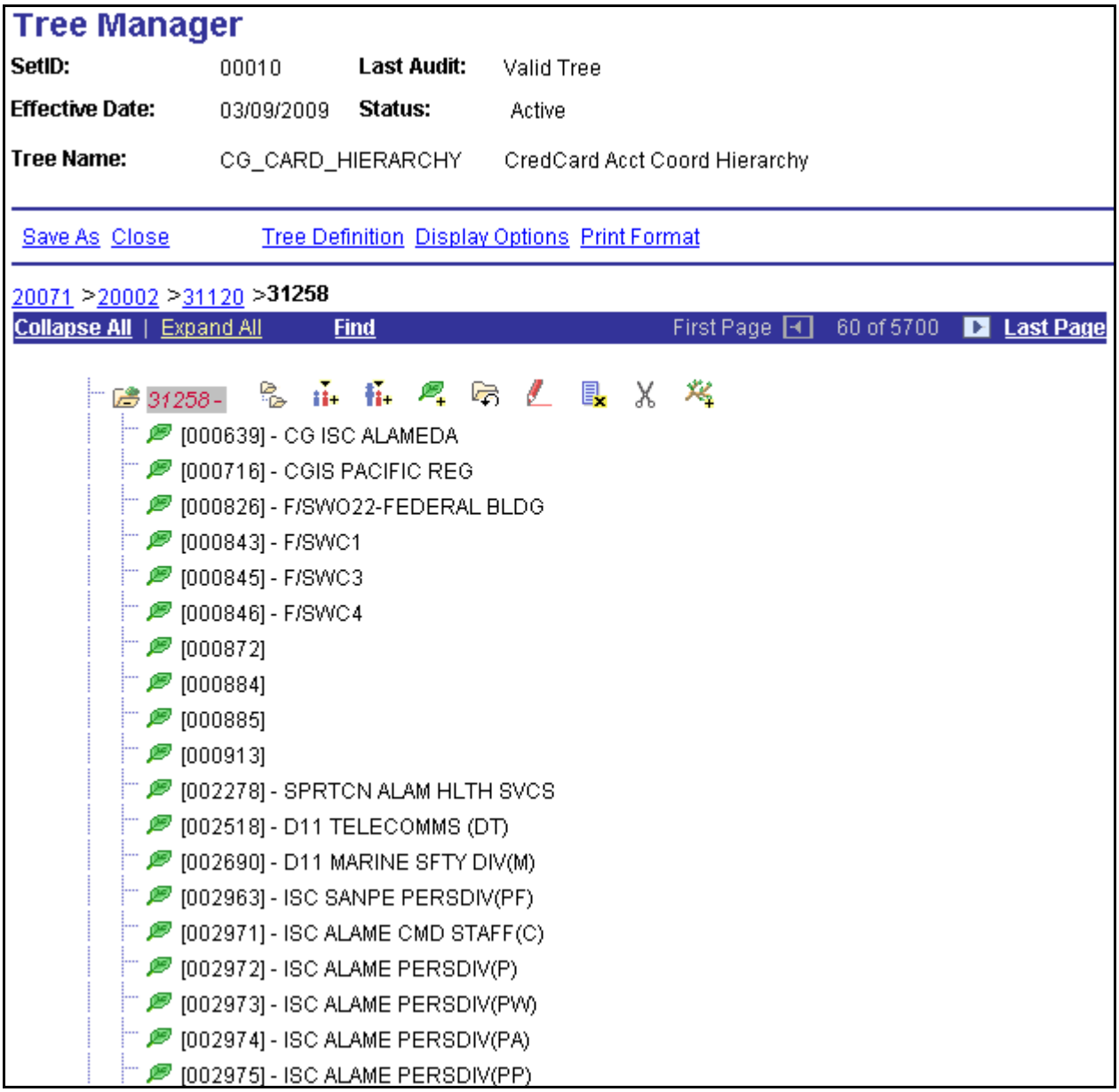


Note: If you type values or descriptions in more than one field on the Find Value page, the system will use the higher located field as a search condition and ignore the lower fields.

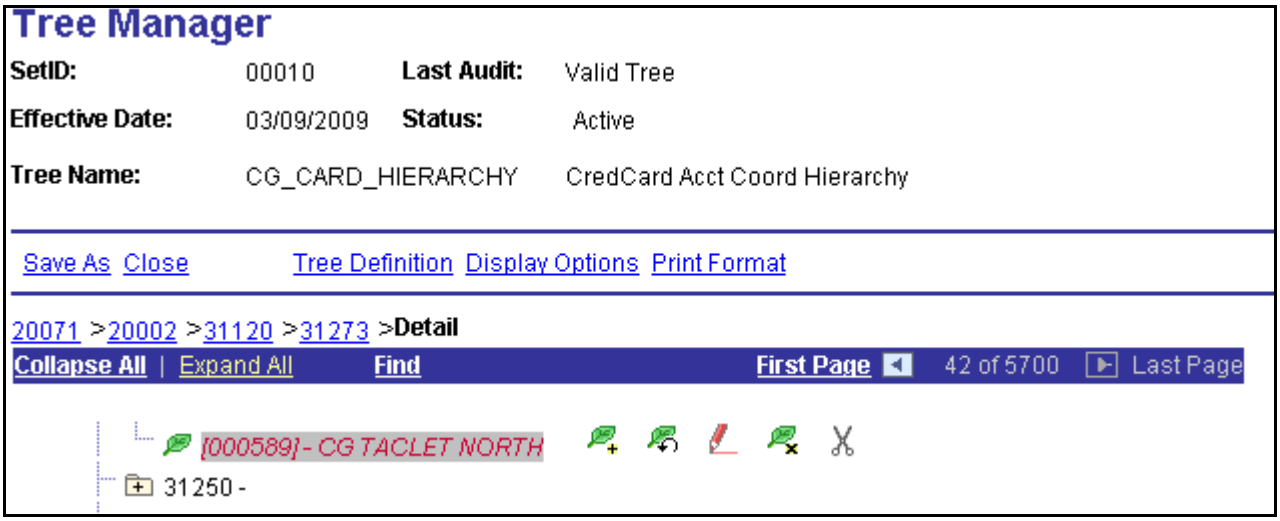
The following screen displays Hierarchy 31258 using the Find Tree Node.

Note:

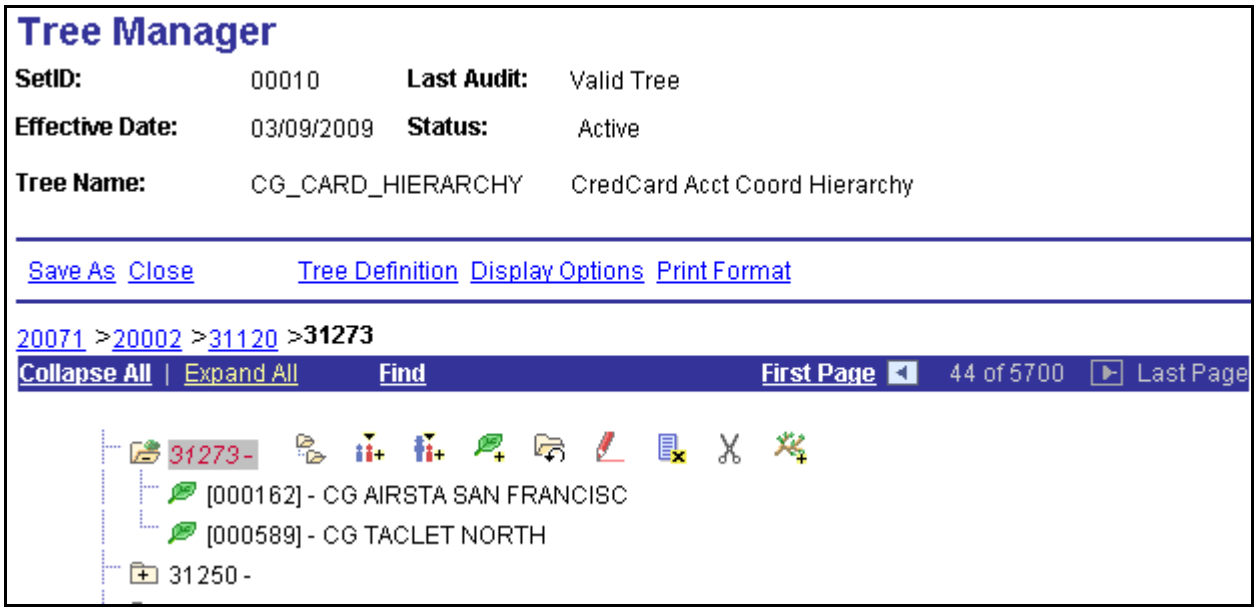
- There are several pages of DeptIDs under this Hierarchy. The following is but the first page.
- From the bread crumbs, we can see that Hierarchy 31258 is under region 31120.



The following screen displays Department 000589 using the Find Detail Value - Department.



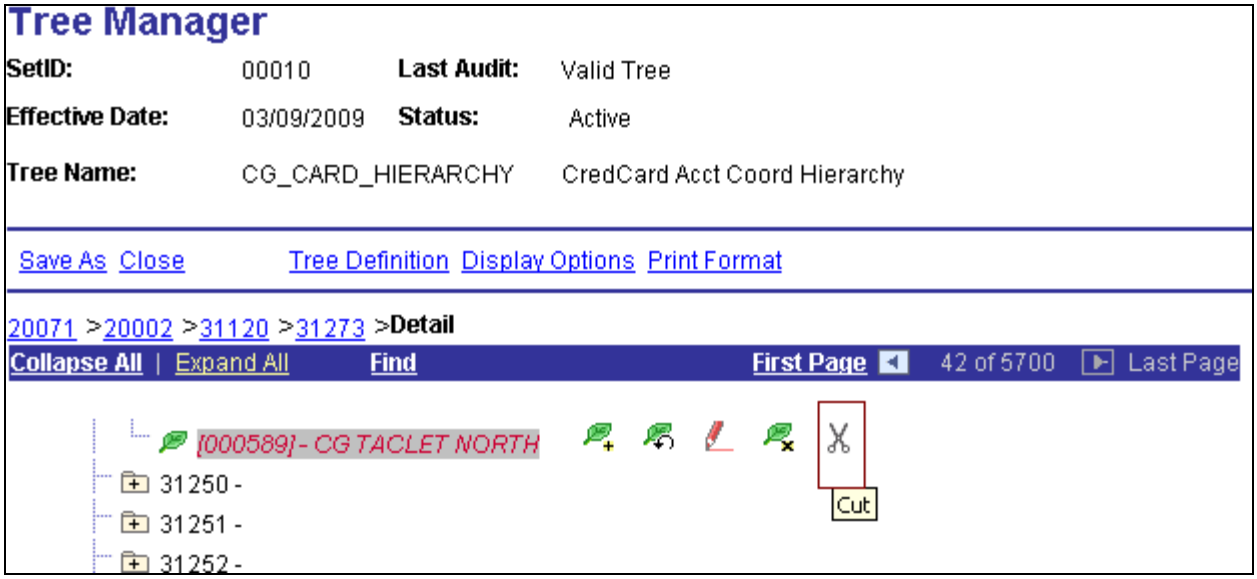
Looking at the bread crumbs, we see that this department (000589) falls under Hierarchy 31273. Click on 31273 link in the bread crumbs and the following information is displayed:



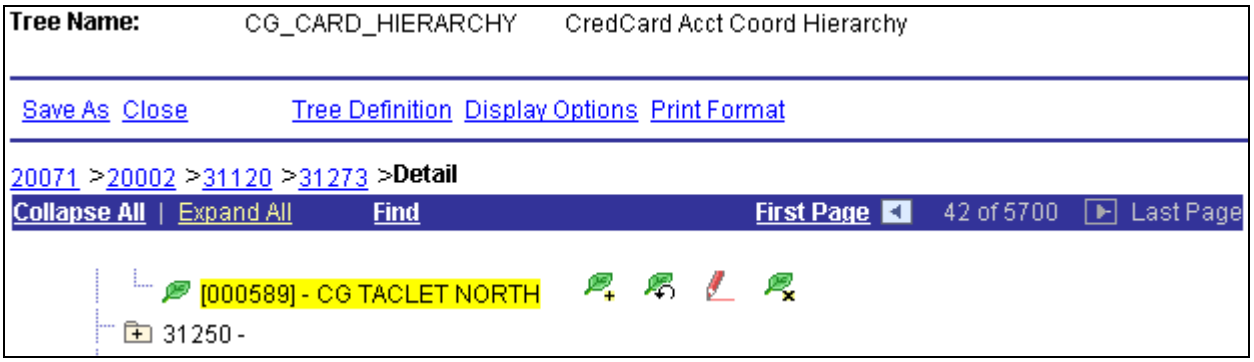
This department has been identified to be moved from Hierarchy 31273 to Hierarchy 31135.

How to Move a Department (using the 'cut' and 'paste' method)

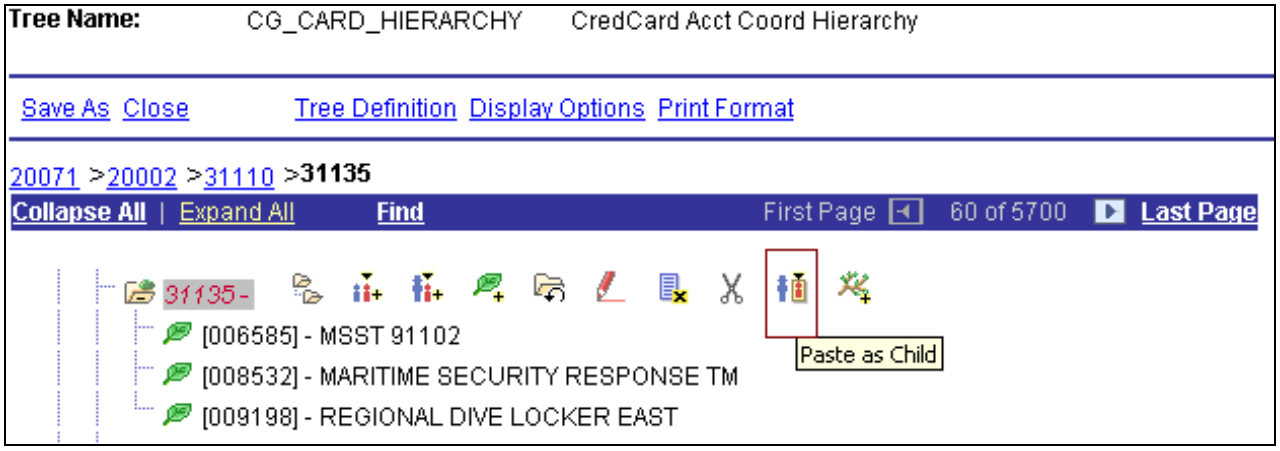
Click on the Cut icon (open scissors).



Once you click on the cut icon, the display changes as follows:

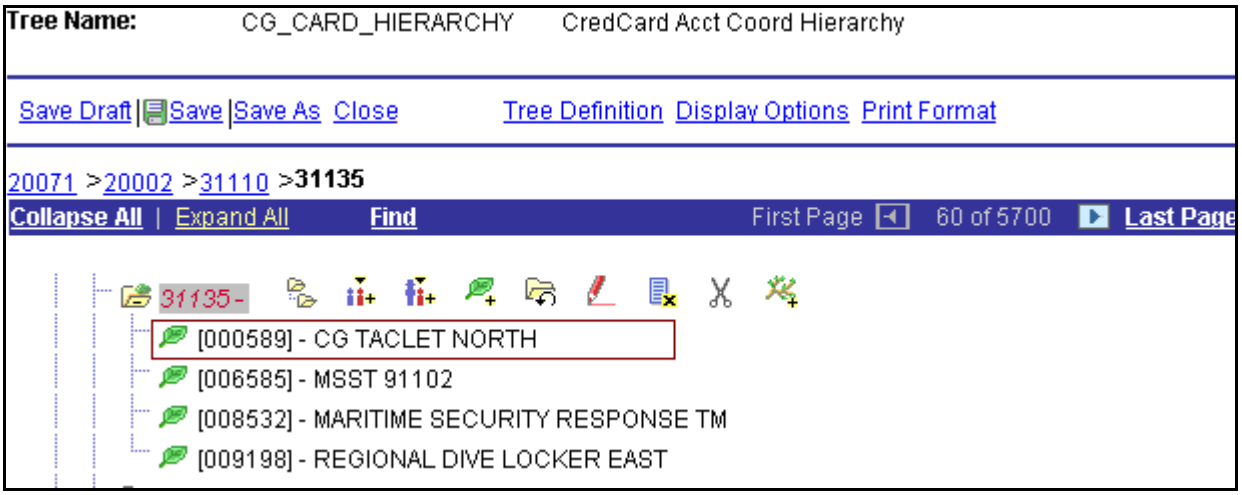


Collapse all nodes. Click on Find and look for Hierarchy 31135.



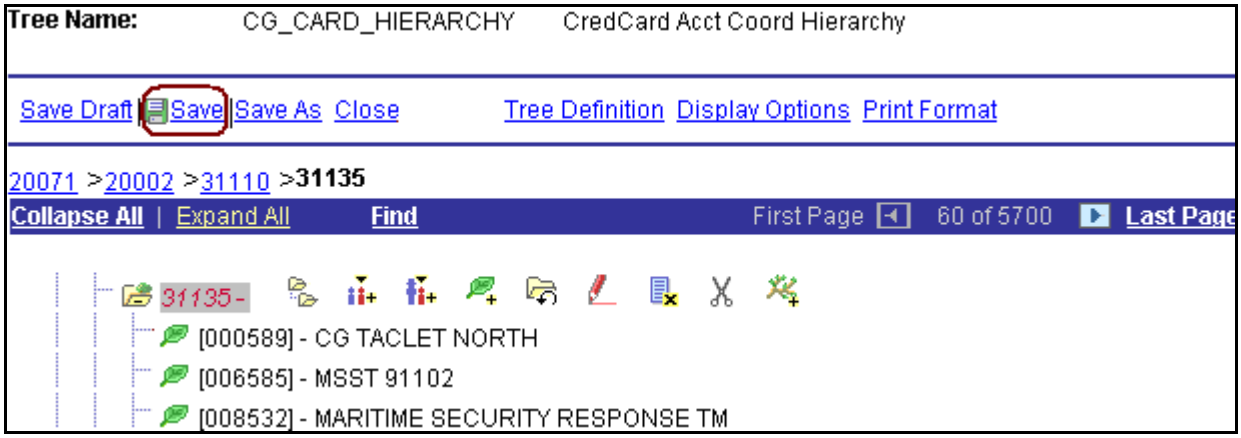
Click on the icon, Paste as Child.

The ‘cut’ department, 000589, is now pasted under Hierarchy 31135.

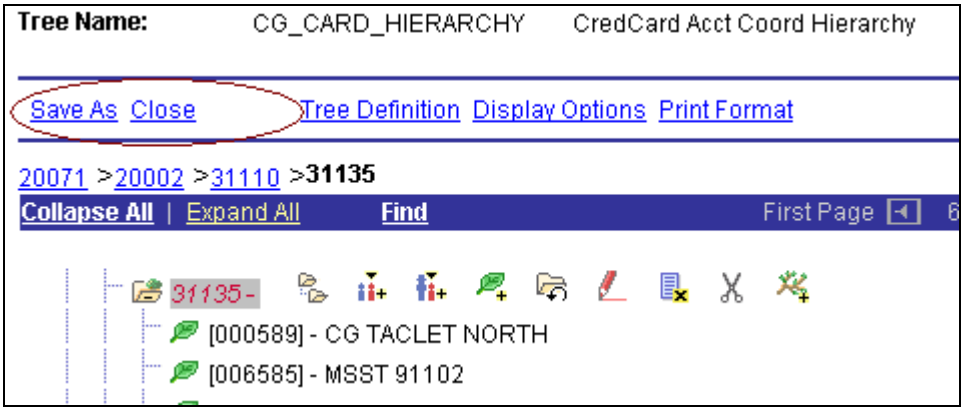


How to Save Changes to the Tree

If you have made changes to the tree, the Save icon (Save) will be available.

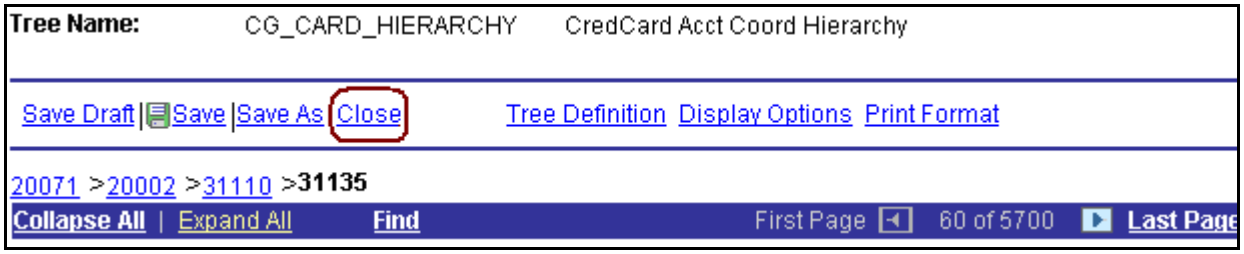


If you are sure of your changes to the tree, click on Save. This will save the tree with your changes. After the tree is saved, notice the Save links change.

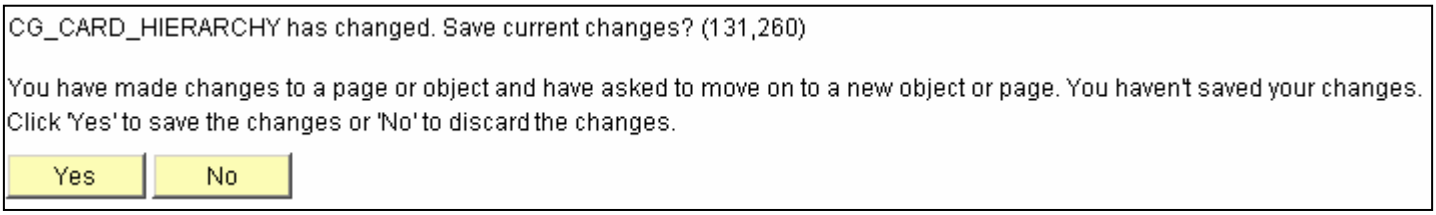


How to Close the Tree

Click the Close link to exit the tree.



Note: If you have made changes to the tree and click Close and have not saved your changes, the following message will display:



Clicking Yes will save your changes. Clicking No will not save the changes. This is handy if you are unsure of the changes you have made and would like to start over again.

The tree will close.

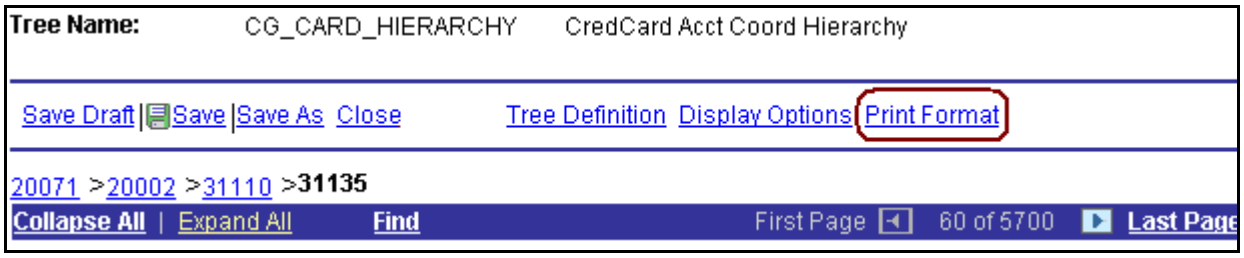
How to Print the Tree

You can print either part of the tree or the whole tree.

To print a tree:

1) Highlight the areas to print.
   To print a whole tree, highlight the root node, or do not highlight any part of the tree.
   To print part of a tree, highlight the top node for the hierarchy that you want to print. You can also select a detail value belonging to that hierarchy.

2) Click the Print Format link on the navigation bar to format the tree so that it can be printed from your browser's print function.



   The expanded tree appears in your browser. If you tree is large, it will probably be too long to fit in one page, and you will need to scroll to view all the parts of the tree.

   Note: The concept of *pages* does not exist on the Print Format page. For this reason, if a selected node hierarchy is too large your browser may time out. To reduce the chances of a time-out occurring, print only the necessary portions of the tree.

3) Click your browser's Print button or select File, Print from your browser to print the tree.

How to Add New Departments to the Hierarchy Tree

The Department Missing from Hierarchy report lists departments which need to be added to the hierarchy tree.

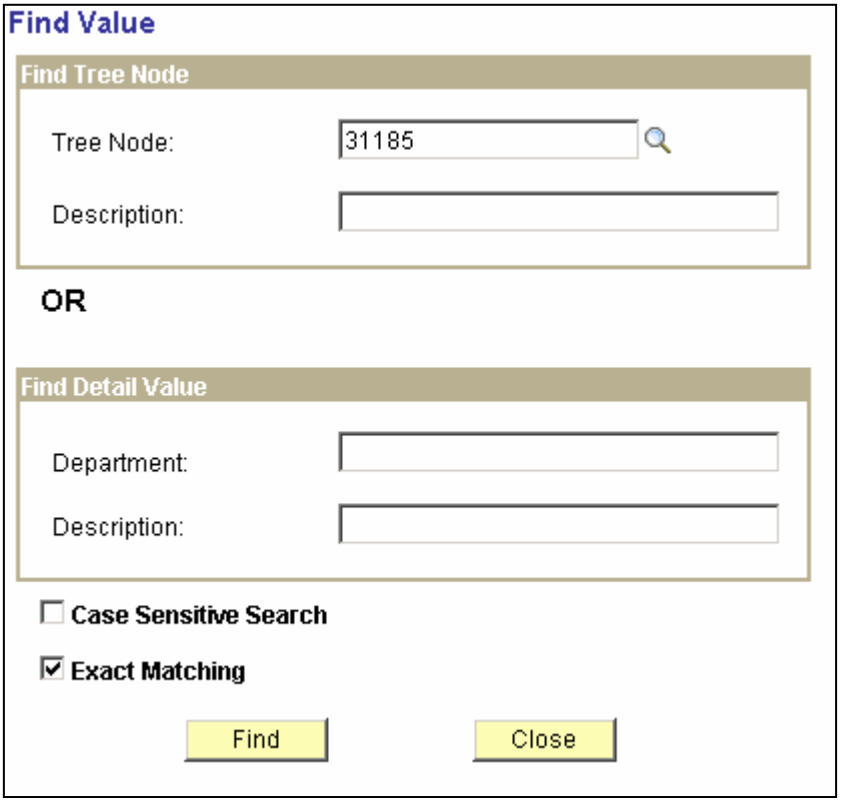
For example, DeptID, 010589, needs to be added to the tree.

R_Dept_Missing_from_Hier_20100910.xls

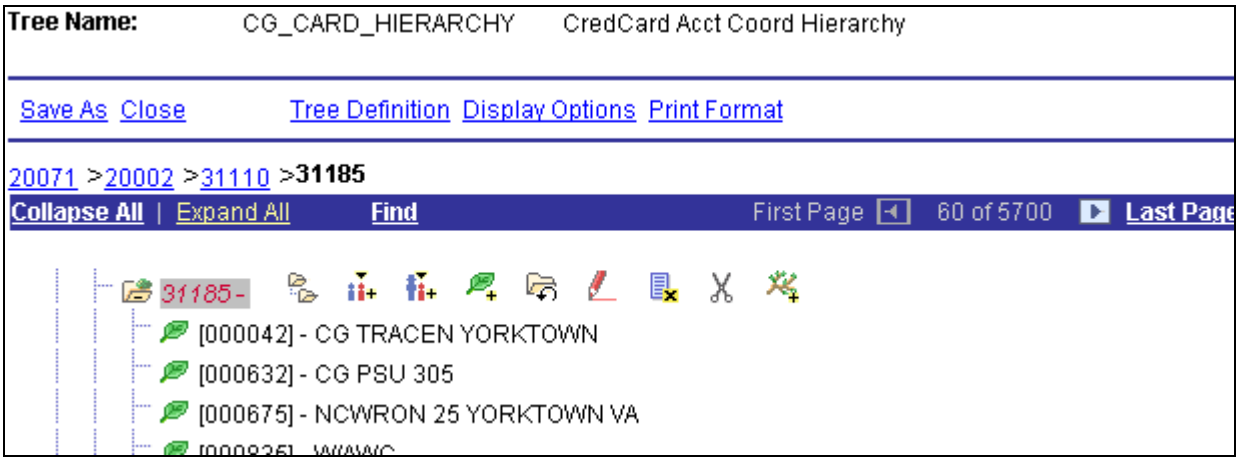
	A	B	C	D	E
1	Dept Missing	from Hierarchy	638		
2	DeptID	Description	Location	City	State
3	036522	DD SFLC ALAMEDA	CA0497	ALAMEDA	CA
4	036544	SFLC-PBPL-ENG-AMS1	MD0154	BALTIMORE	MD
5	010360	DDE HSWL PUERTO RICO	PR0096	SAN JUAN	PR
6	036102	DD KODIAK	AK0841	KODIAK	AK
7	036156	DD-NAIS PRO	VA1349	NEWPORT NEWS	VA
8	010589	DD-SFLC ALAMEDA	CA0497	ALAMEDA	CA
9	009768	DDE-DOJ	DC0294	WASHINGTON	DC
10	036744	COMMANDANT (CG-5533)	DC0019	WASHINGTON	DC

The TCC Administrator determines which Hierarchy node (coordinator) will be assigned the missing department. Let's add department 010589 to Hierarchy 31185.

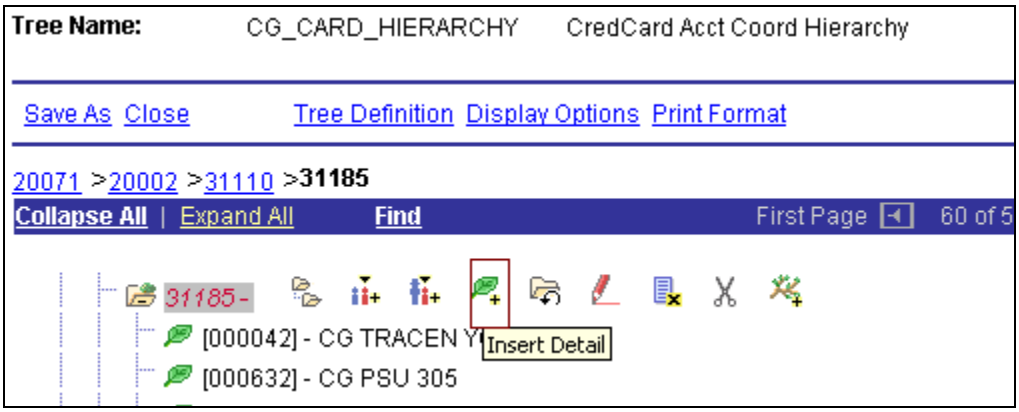
While in Tree Manager in the TCC Hierarchy Tree, CG_CARD_HIERARCHY, click on the Find link. Enter 31185 in the Tree Node box. Click the Find button.



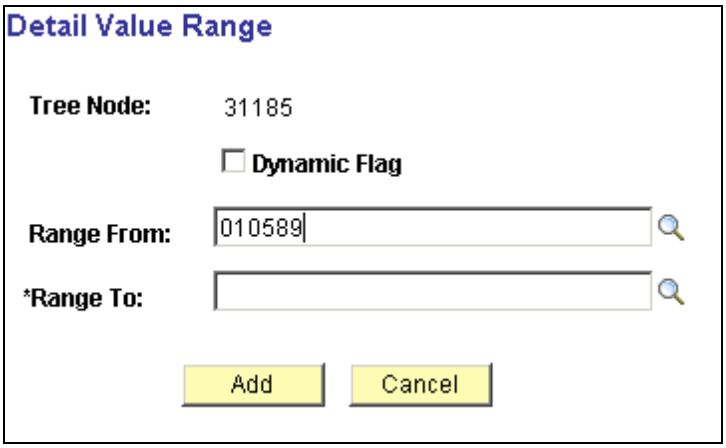
The 31185 node is displayed as follows:



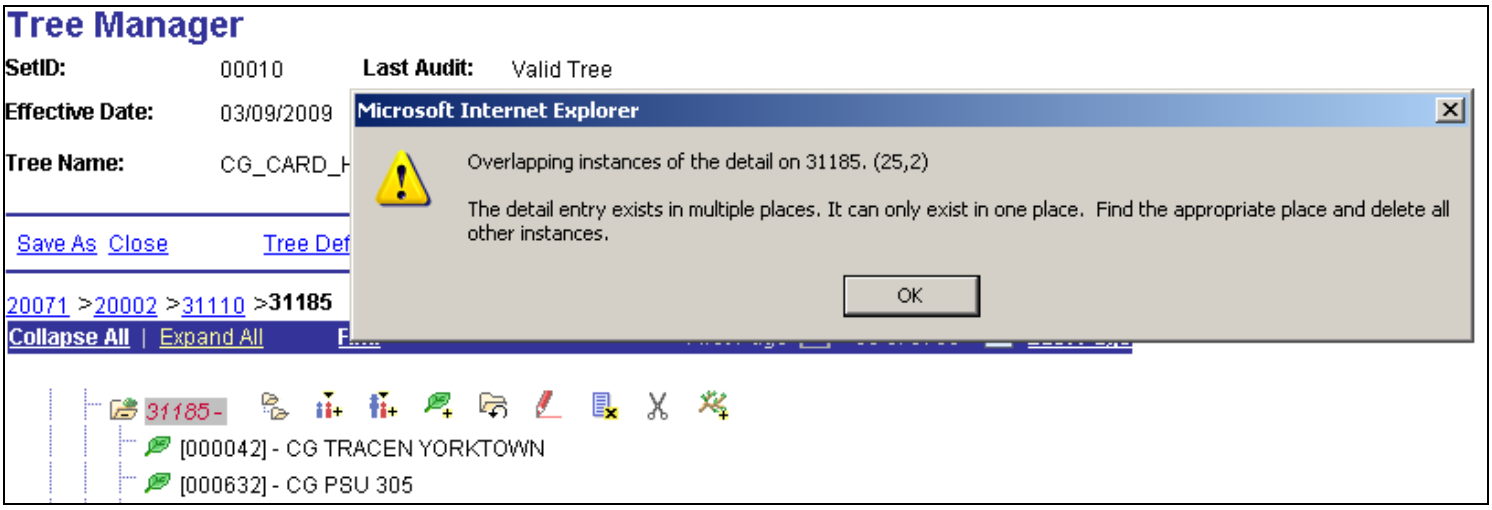
Place your cursor over the fourth icon to the right of 31185 (green leaf+), “Insert Detail” text box is displayed. Click the “Insert Detail” icon.



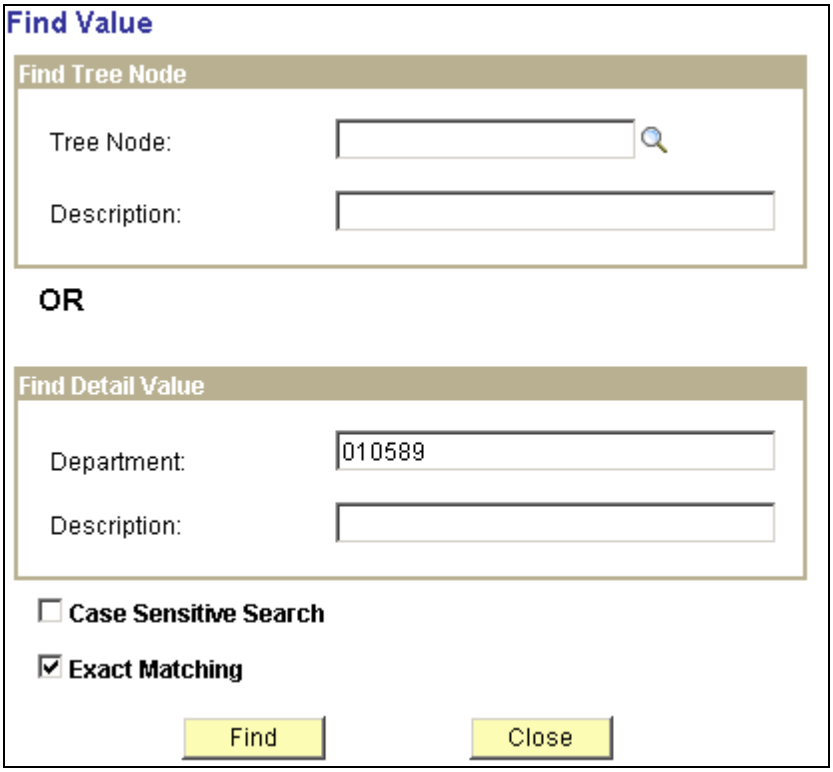
Enter 010589 on the following screen:



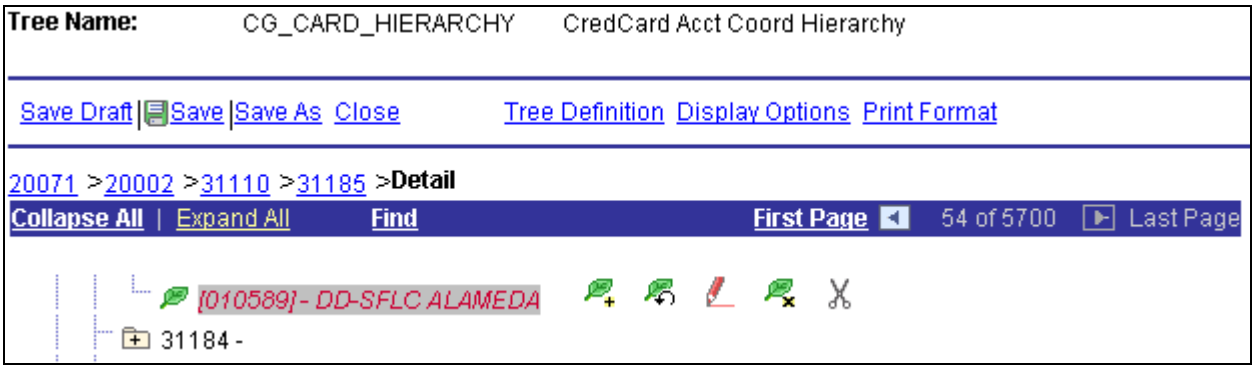
Click on the Add button.



This error message is displayed because Department 010589 has already been added to the tree. Click OK. Collapse All. Click on Find. Search for Department 010589.

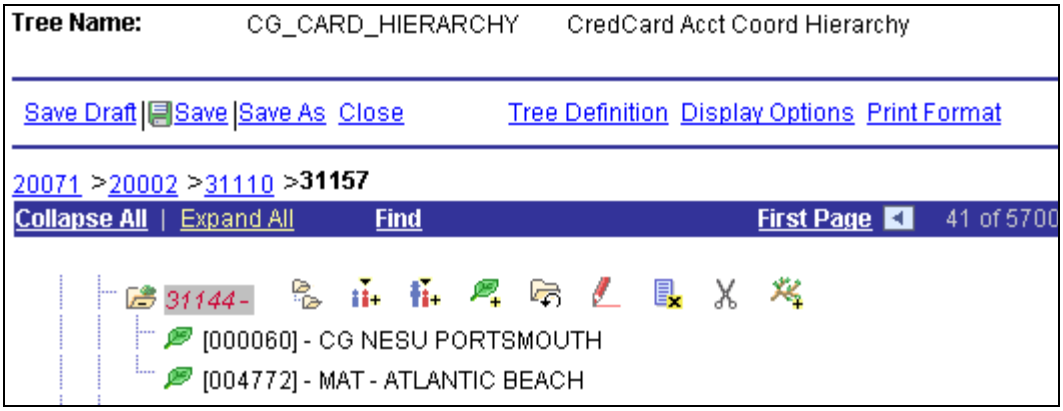


Click the Find button. The following is displayed.

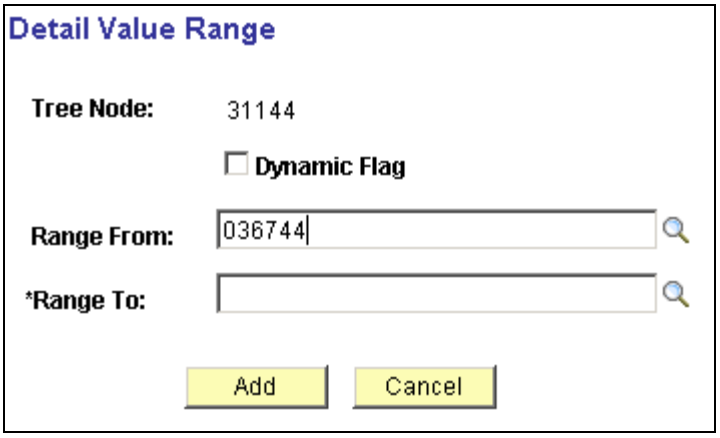


Department 010589 is already located in Hierarchy 31185.

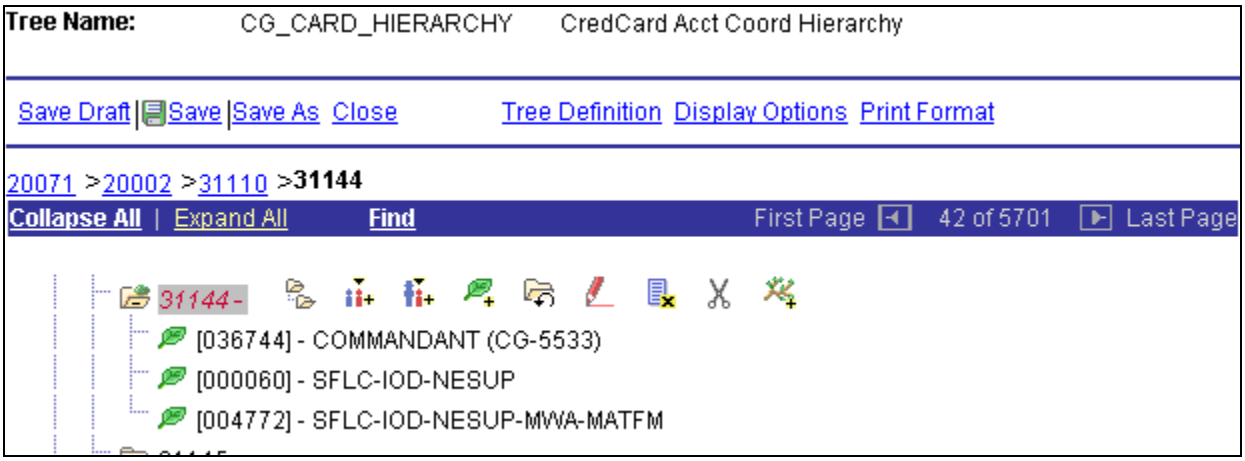
Let's pick another department to add; 036744 needs to be added to hierarchy 31144.
Find 31144 in the tree.



Click on the green leaf+ (Insert Detail) and enter 036744 as follows:



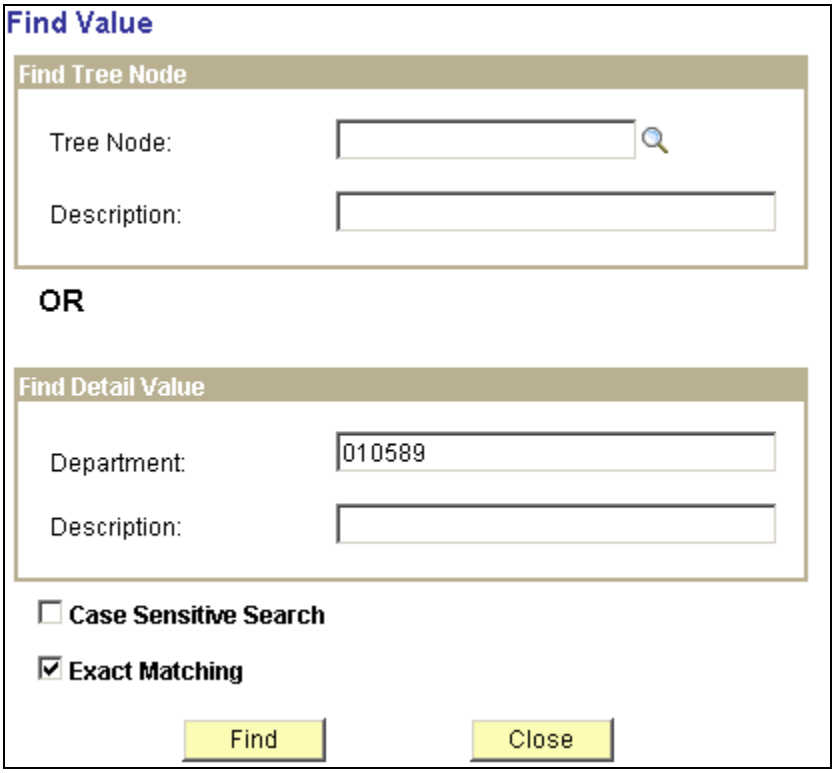
Click the Add button.



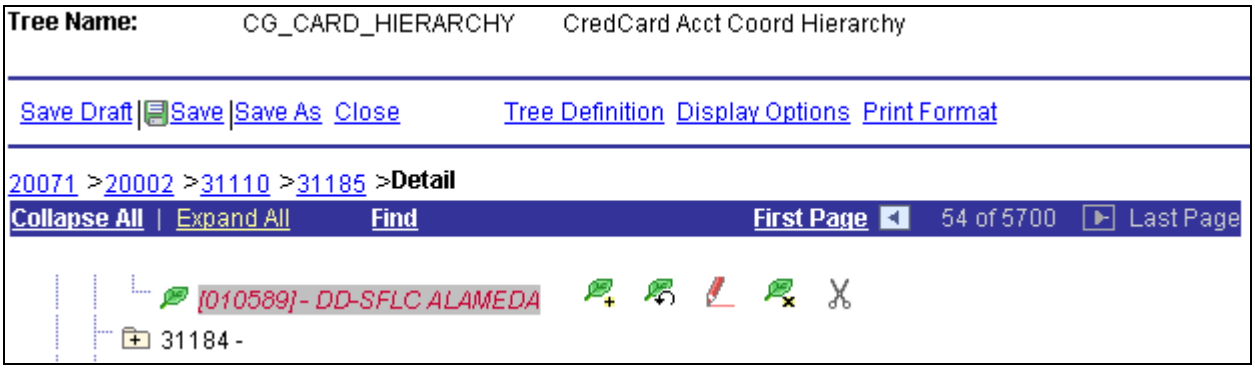
Department is added.

How to Delete a Department

Collapse All. Click on Find. Search for Department 010589.

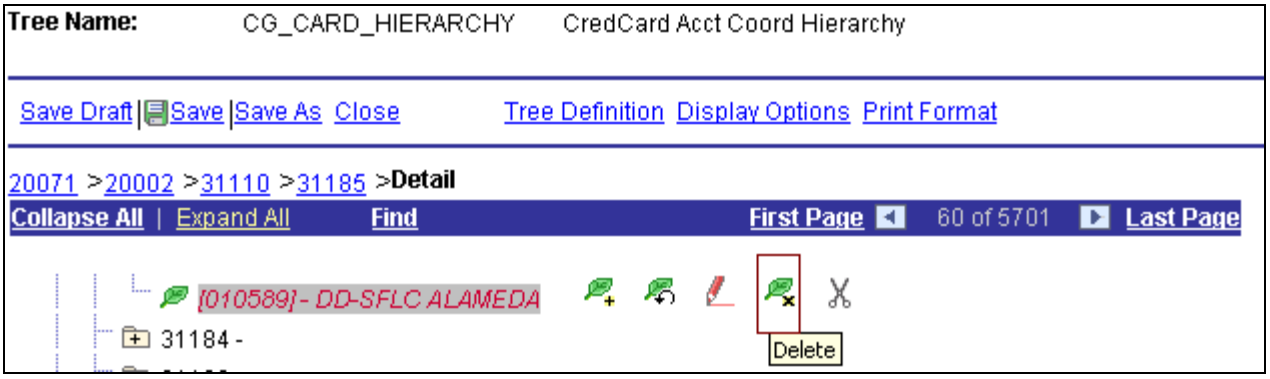


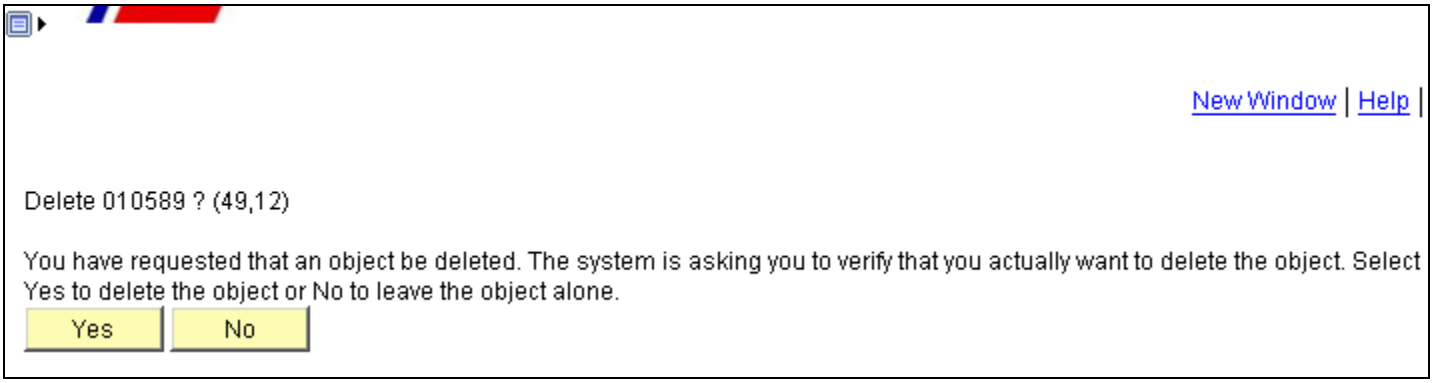
Click the Find button. The following is displayed.



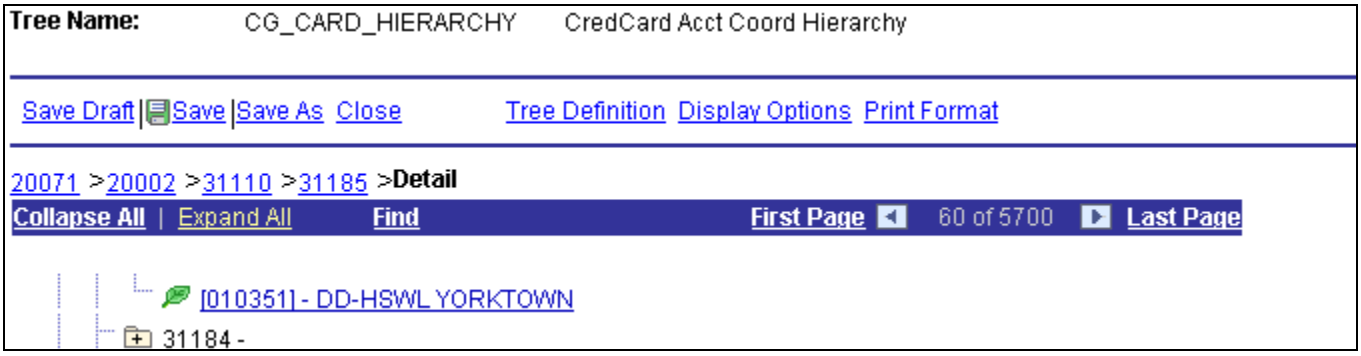
Place your cursor over the icon green leaf with the x. The text box, Delete, is displayed.

Click on the Delete icon.



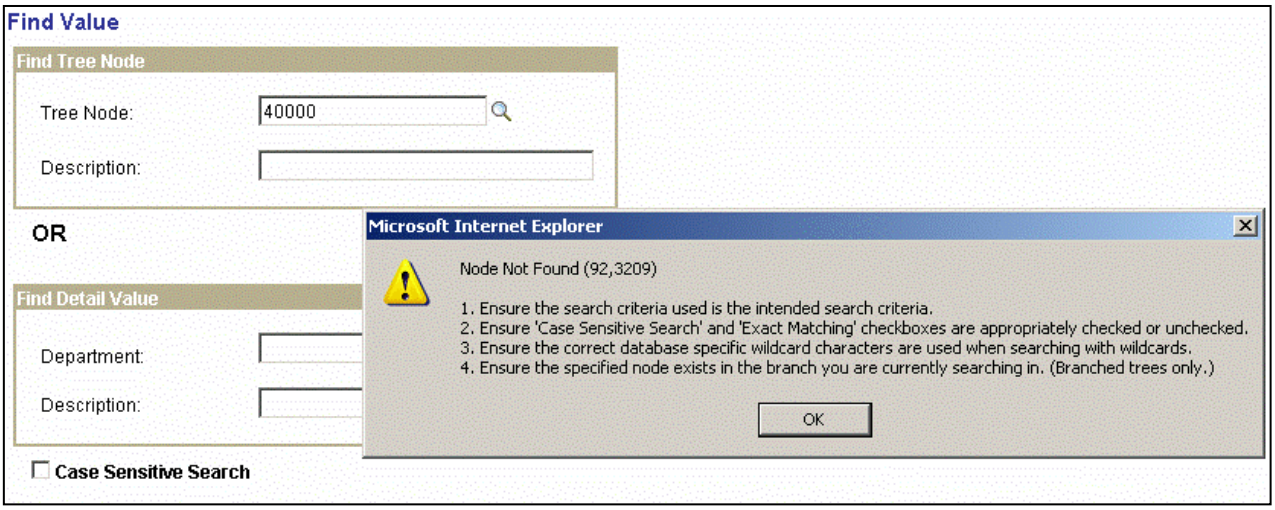


Click Yes. The department is deleted.

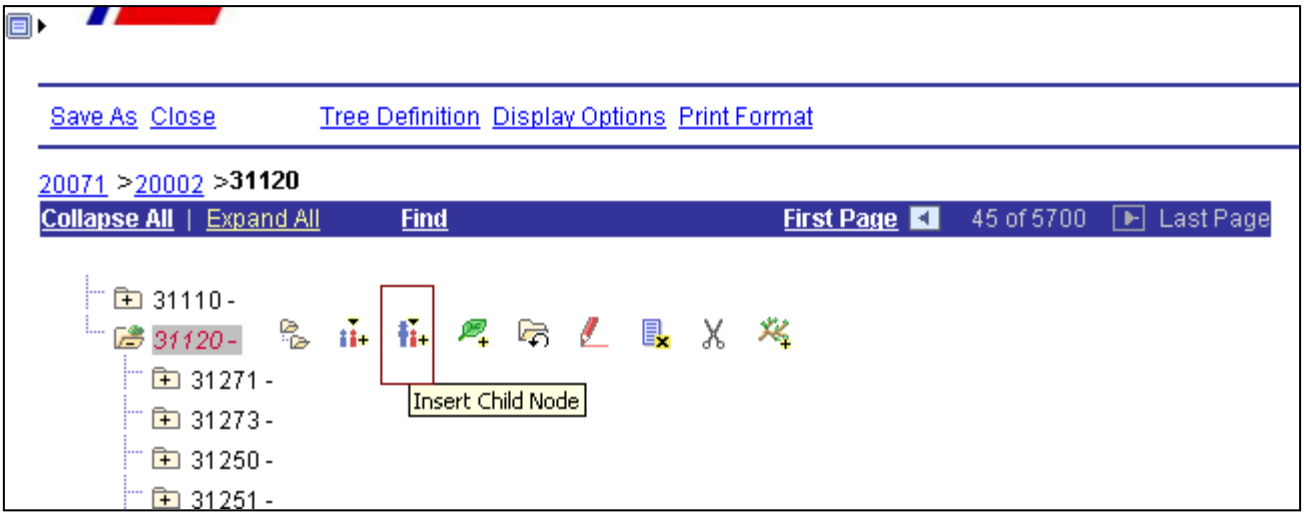


How to Add a Hierarchy

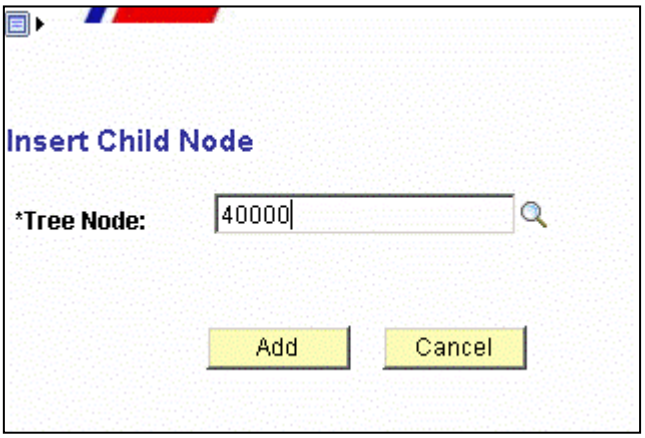
Perform a Find to see if the hierarchy node you wish to add already exists or not.
If it does not exist, an error message will be displayed.



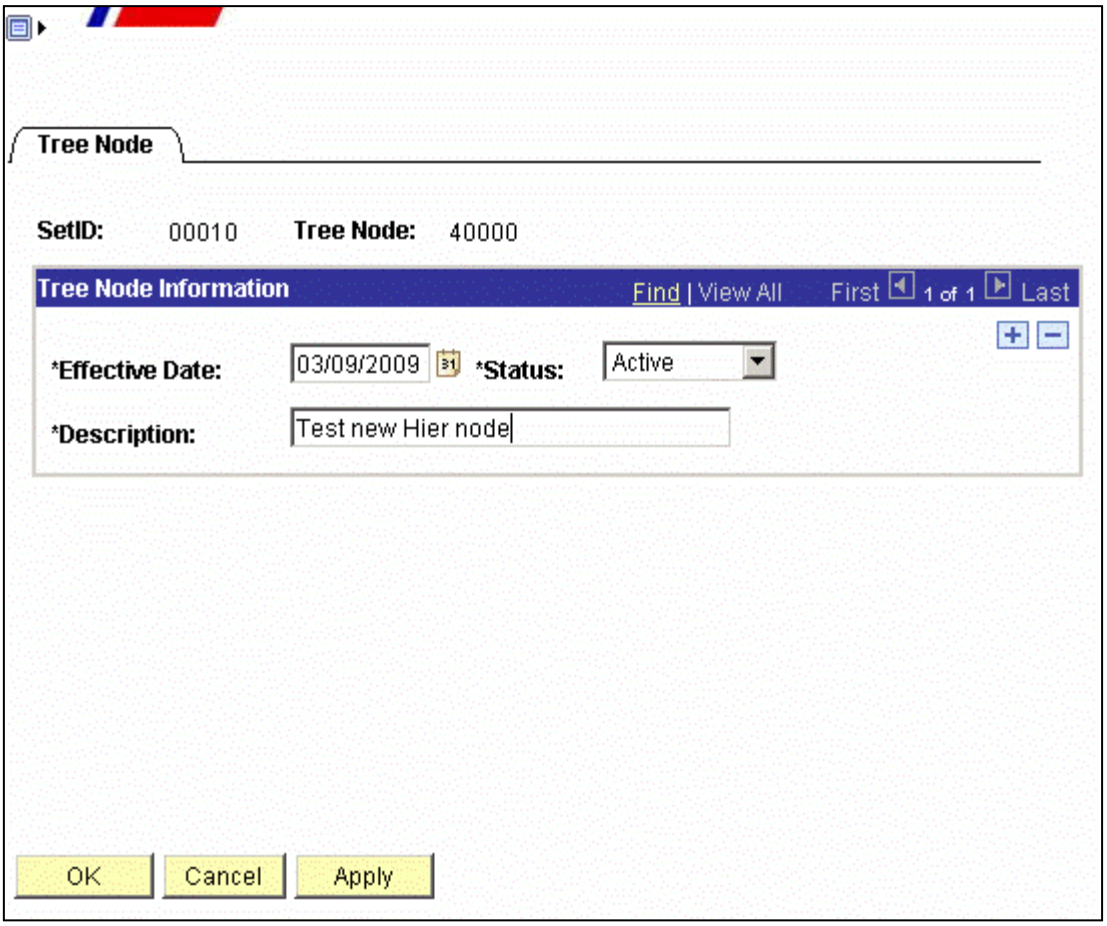
Collapse All. Expand parent 20002.
Let's add Hierarchy 40000 to area 31120.
Click on 31120 to display the icons.
Expand 31120.
Click on the Insert Child Node (third icon from 31120).



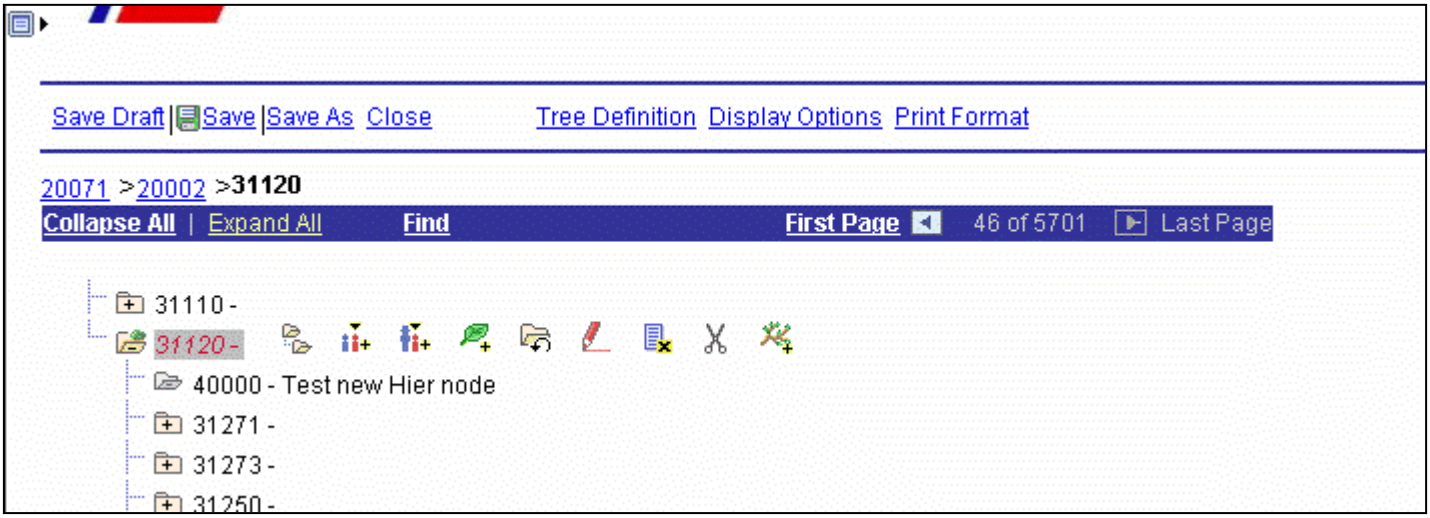
Enter 40000 and click Add.



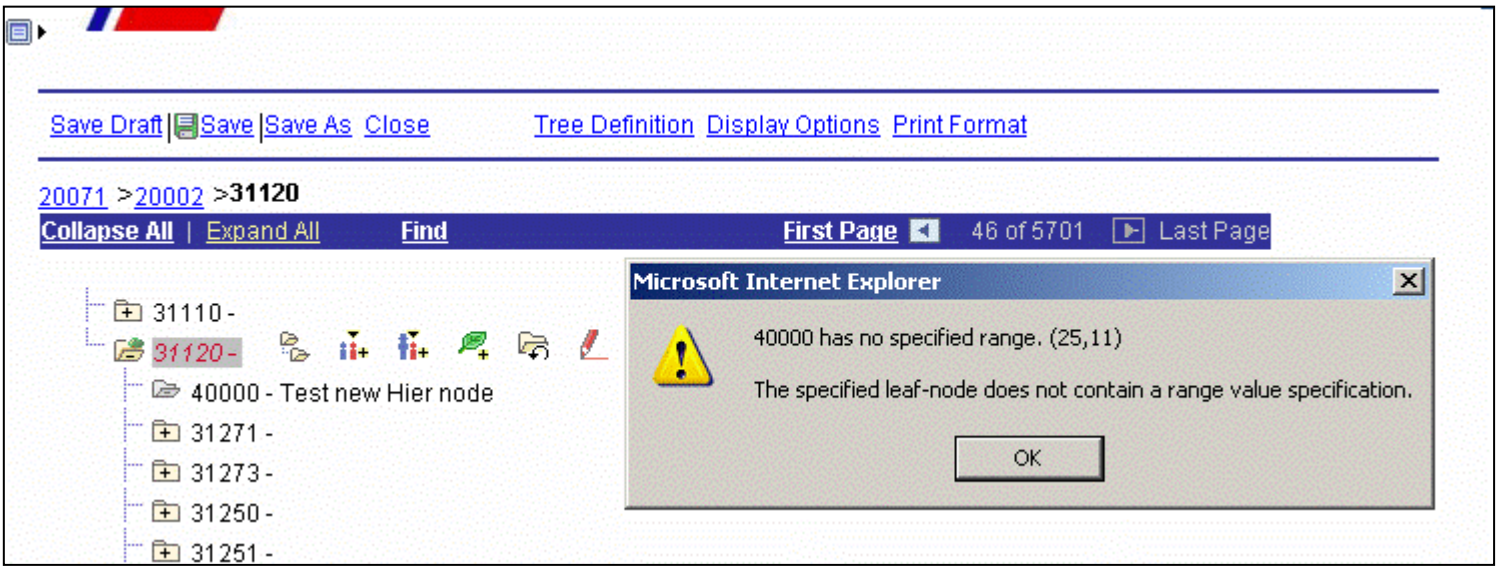
Enter a description if you like, and click OK. Note, none of the hierarchy nodes have descriptions at present.



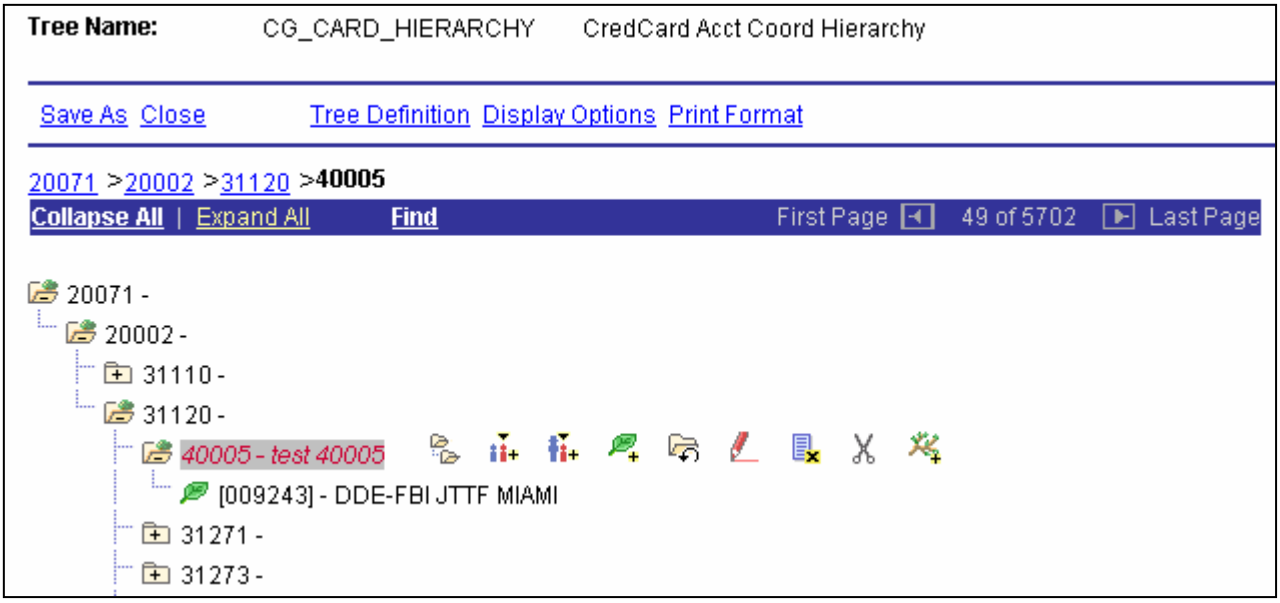
The 40000 Hierarchy is added to area 31120, but before we can save the changes, the hierarchy must have a department assigned to it.



If not, you will see the following error message if you click on Save:



Add department, 009243, and Save. [Click on the hierarchy node 40000. Click insert detail (green leaf+) and add 009243 into the From Range.]


Tree Name: CG_CARD_HIERARCHY CredCard Acct Coord Hierarchy
Save As Close Tree Definition Display Options Print Format
20071 >20002 >31120 >40005
Collapse All | Expand All Find First Page 49 of 5702 Last Page
20071 -
20002 -
31110 -
31120 -
40005 - test 40005
[009243] - DDE-FBI JTTF MIAMI
31271 -
31273 -

How to Delete a Hierarchy

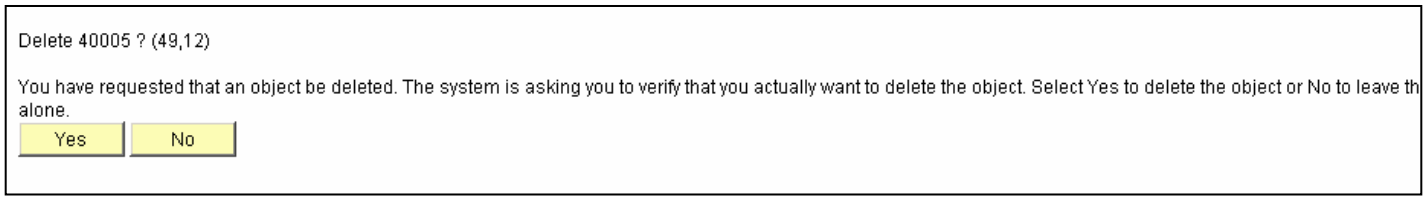
Deleting a Hierarchy code will also delete all the Departments under the Hierarchy.

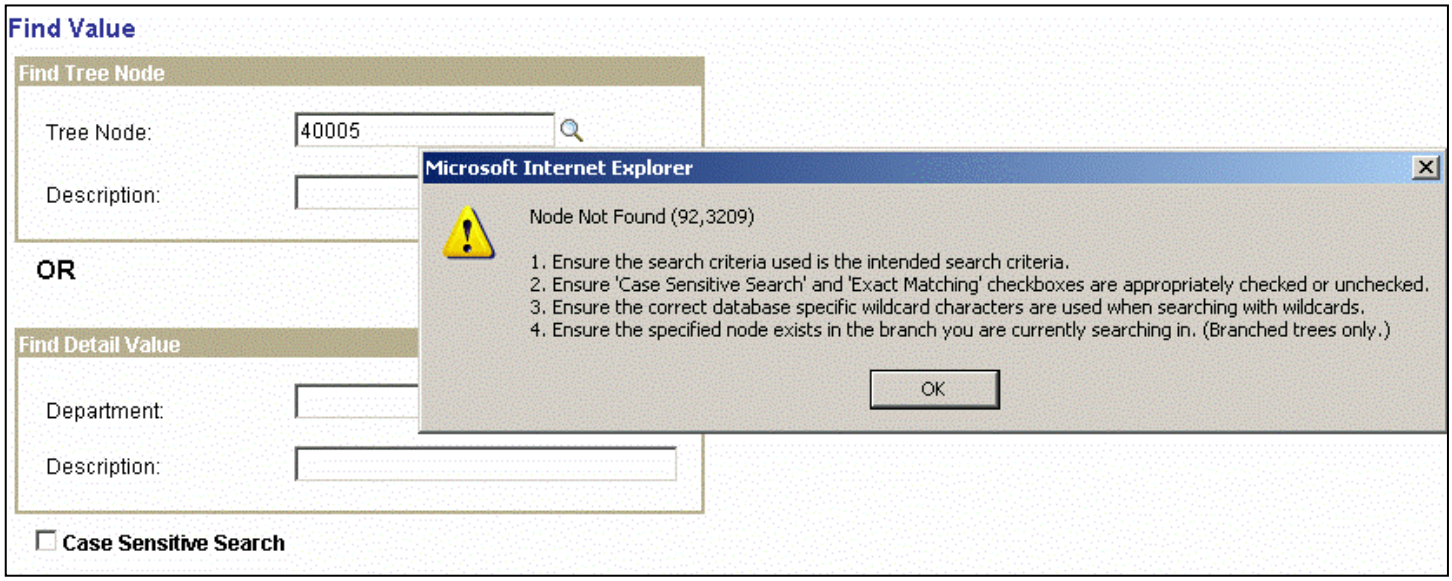
If you do not want to delete the departments under the Hierarchy code selected for deletion, then move the departments to whatever Hierarchy code you wish before deleting the hierarchy.

First select the hierarchy code to be deleted by clicking on the hierarchy code to display the icons to the right. Placing your cursor over the letterx icon will display the text box “delete”.

To delete the selected hierarchy code, click on the letterx icon.

The following will be displayed



Click Yes. If you are certain of your changes; then Save your tree changes.

Search for your newly deleted Hierarchy Code using the Find option.
Find 40005 Hierarchy. You should expect to see an error stating that it could not be found.