

# **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!**

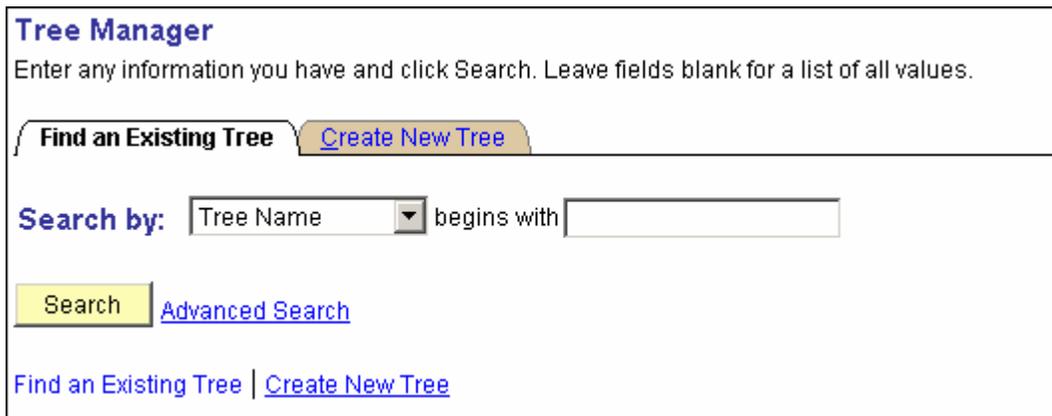
- Caution is the key word when performing maintenance on Trees.
- When selecting the tree to open for maintenance, ensure that you only select and open the TCC Hierarchy Tree; Tree Name is CG\_CARD\_HIERARCHY.
- Vendor advises: Be extremely cautious about using the browser's Back button while in Tree 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.

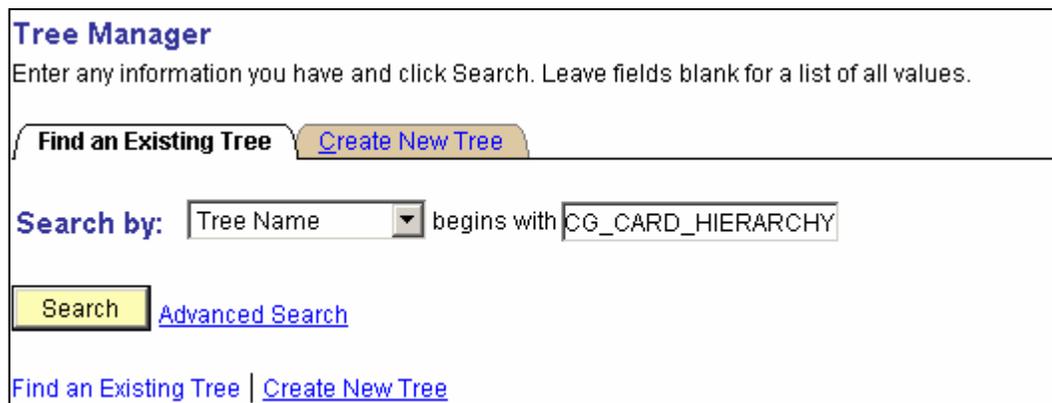


The Tree Manager Search box will be displayed.

A screenshot of the "Tree Manager" search interface. It features a title "Tree Manager" and a subtitle "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this are two tabs: "Find an Existing Tree" (selected) and "Create New Tree". A "Search by:" label is followed by a dropdown menu set to "Tree Name" and a text input field containing "begins with". Below the input field is a yellow "Search" button and a blue "Advanced Search" link. At the bottom, there are links for "Find an Existing Tree" and "Create New Tree".

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.

A screenshot of the "Tree Manager" search interface, identical to the previous one, but with the text "CG\_CARD\_HIERARCHY" entered into the search input field.

The Reporting Hierarchy Tree will open and display as follows:

## Tree Manager

**SetID:** 00010      **Last Audit:** Valid Tree  
**Effective Date:** 03/09/2009      **Status:** Active  
**Tree Name:** CG\_CARD\_HIERARCHY      CredCard Acct Coord Hierarchy

[Save As](#) [Close](#)      [Tree Definition](#) [Display Options](#) [Print Format](#)

**Collapse All** | **Expand All**      **Find**      First Page  2 of 5699  Last Page

 20071 -          
└─  20002 -

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.

### Tree Manager

**SetID:** 00010      **Last Audit:** Valid Tree  
**Effective Date:** 03/09/2009      **Status:** Active  
**Tree Name:** CG\_CARD\_HIERARCHY      CredCard Acct Coord Hierarchy

---

[Save As](#) [Close](#)      [Tree Definition](#) [Display Options](#) [Print Format](#)

---

[20071](#) >[20002](#)

[Collapse All](#) | [Expand All](#)      [Find](#)      First Page  4 of 5699  Last Page

 20071 -  
└─  20002 -  
    ├─  31110 -  
    └─  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.

---

[Save Draft](#) |  [Save](#) | [Save As](#) [Close](#)      [Tree Definition](#) [Display Options](#) [Print F](#)

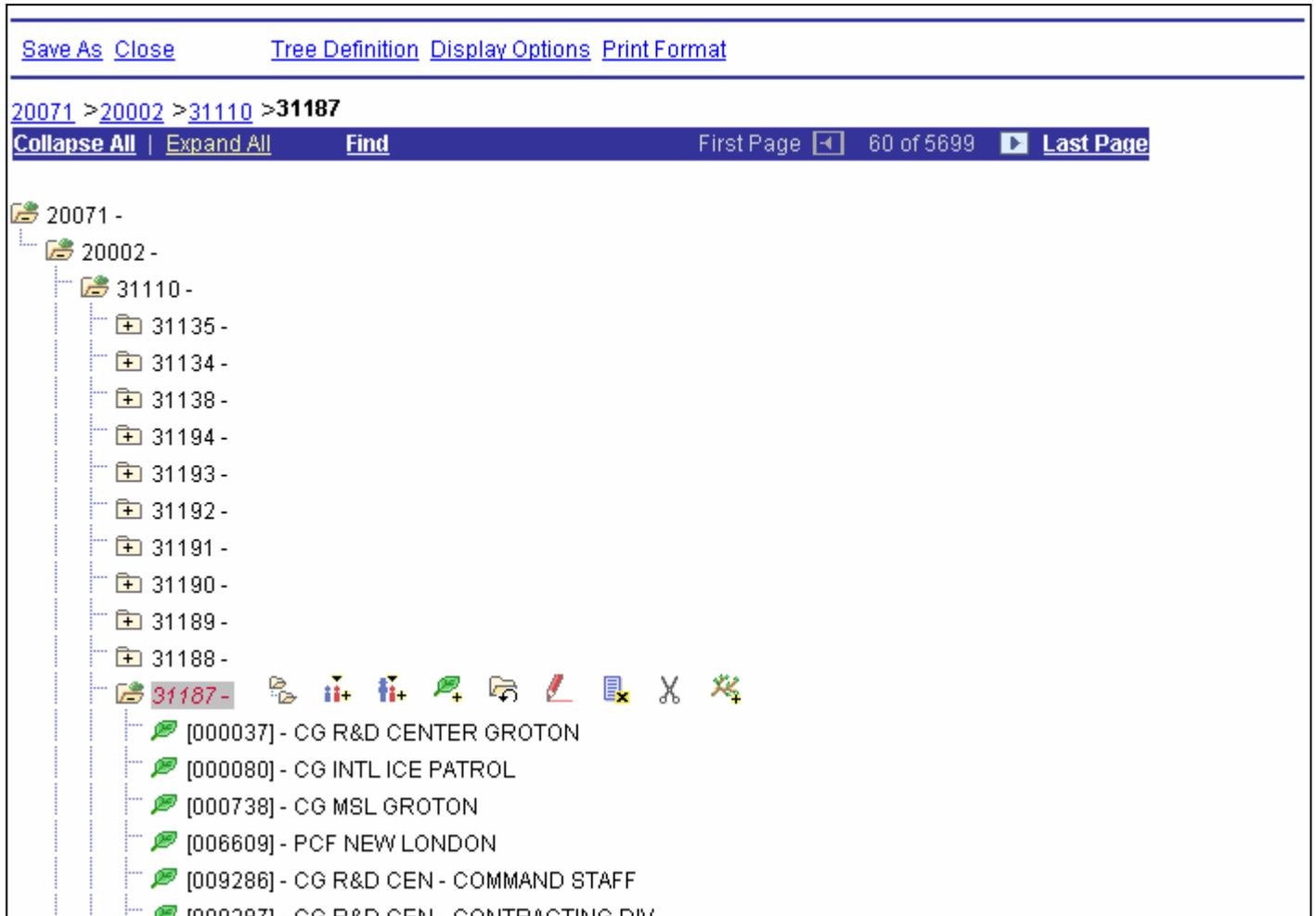
---

[20071](#) >[20002](#) >[31110](#)

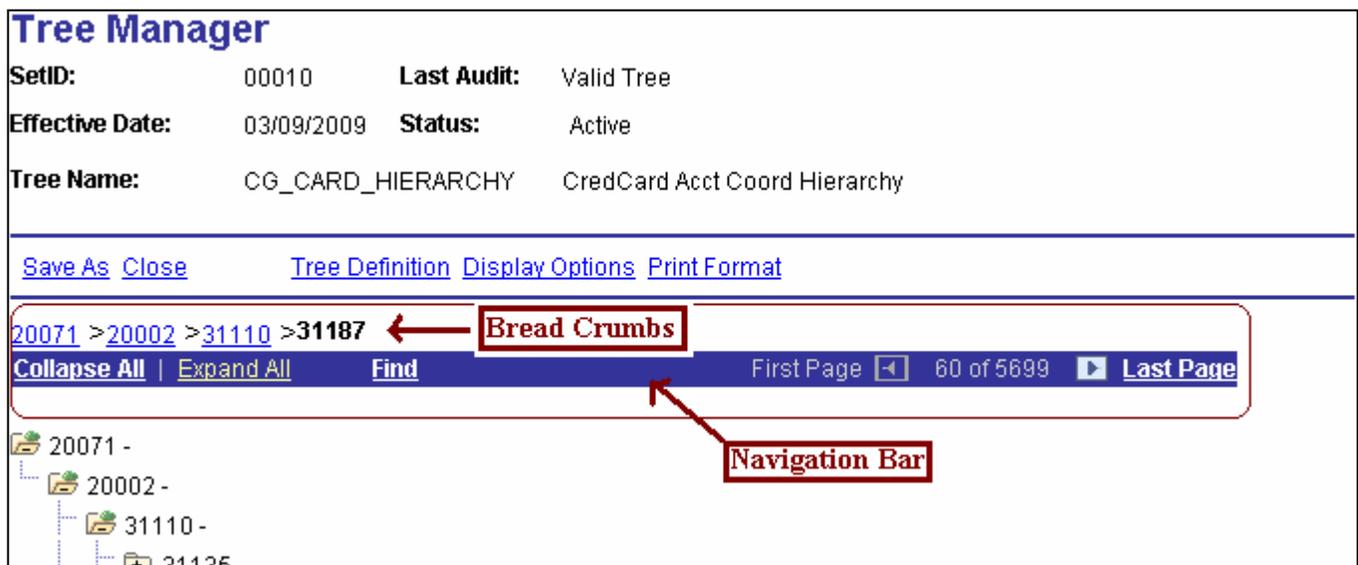
[Collapse All](#) | [Expand All](#)      [Find](#)      First Page 

 20071 -  
└─  20002 -  
    ├─  31110 -  
        ├─  31135 -  
        ├─  31134 -  
        ├─  31138 -  
        ├─  31194 -  
        └─  31193 -

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.

The screenshot shows the 'Tree Manager' interface. At the top, it displays metadata: SetID: 00010, Last Audit: Valid Tree, Effective Date: 03/09/2009, Status: Active, and Tree Name: CG\_CARD\_HIERARCHY CredCard Acct Coord Hierarchy. Below this is a navigation bar with links: Save As, Close, Tree Definition, Display Options, and Print Format. A breadcrumb trail shows the current path: 20071 > 20002 > 31110 > 31187. The navigation bar includes 'Collapse All', 'Expand All', 'Find', 'First Page' (with a left arrow), '60 of 5699', and 'Last Page' (with a right arrow). Red boxes highlight the 'First Page' and 'Last Page' buttons, with arrows pointing to labels 'Previous Page Arrow' and 'Next Page Arrow' respectively. On the left, a tree structure is visible with nodes 20071, 20002, 31110, 31135, and 31134.

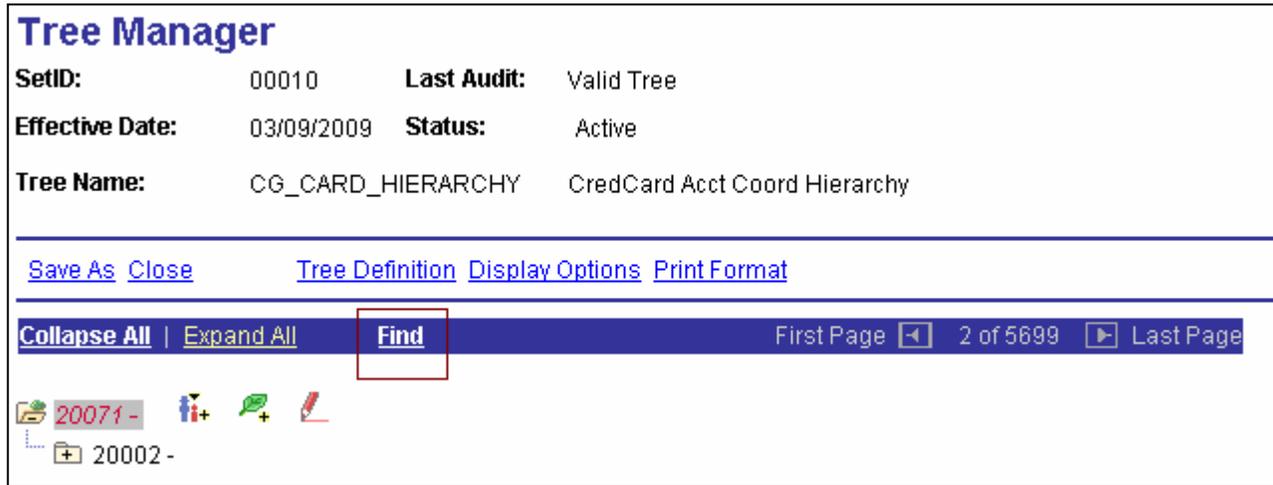
Also note the First Page and Last Page shortcut links. The Previous Page and Next Page arrows are noted above.

## 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.

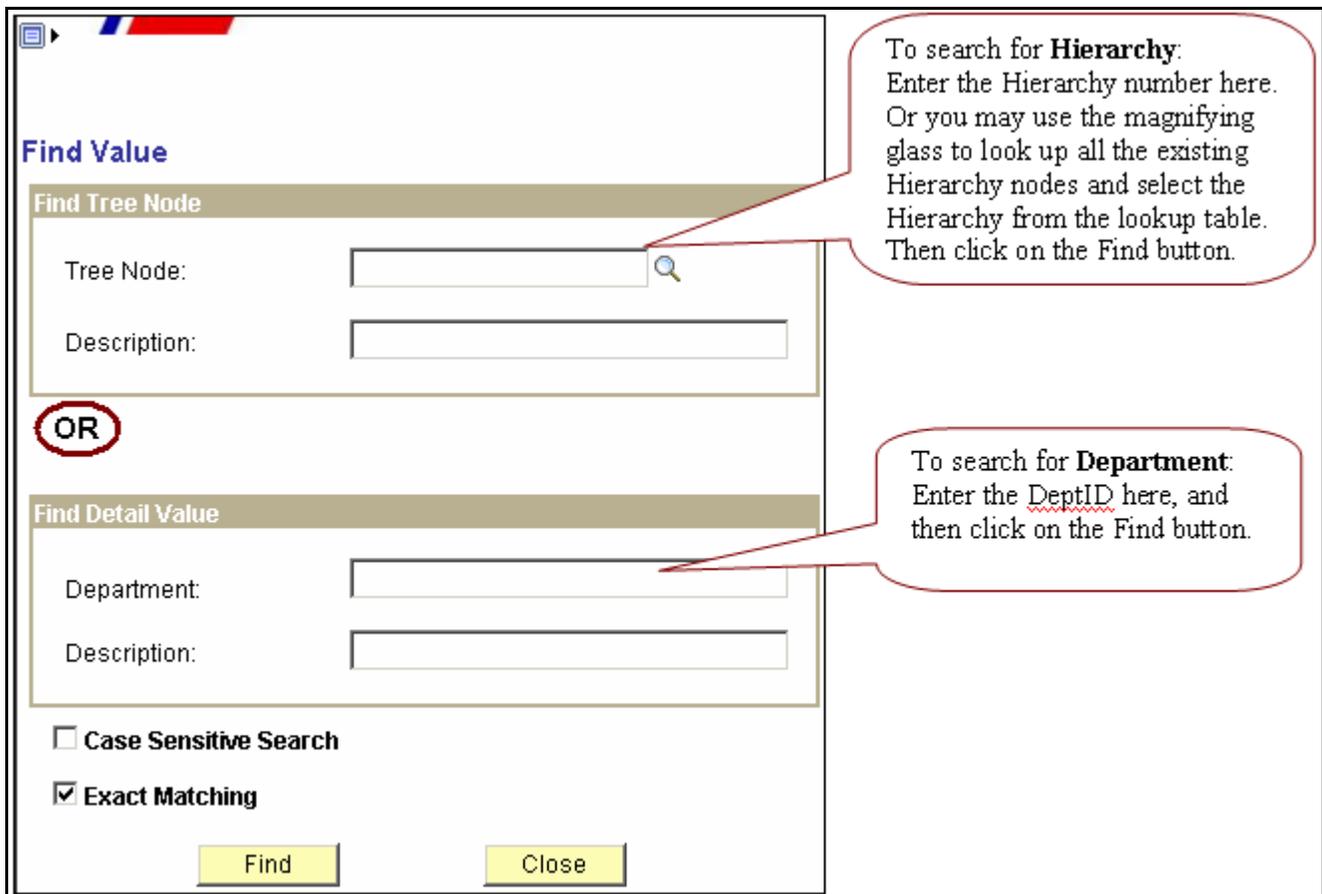
## Searching for Hierarchy Nodes or Department IDs – the Find Value page

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



The screenshot shows the 'Tree Manager' interface. At the top, it displays metadata for a tree: SetID: 00010, Last Audit: Valid Tree, Effective Date: 03/09/2009, Status: Active, and Tree Name: CG\_CARD\_HIERARCHY (CredCard Acct Coord Hierarchy). Below this is a navigation bar with links for 'Save As', 'Close', 'Tree Definition', 'Display Options', and 'Print Format'. A secondary navigation bar contains 'Collapse All', 'Expand All', and a 'Find' button which is highlighted with a red box. To the right of the 'Find' button are pagination controls: 'First Page', '2 of 5699', and 'Last Page'. At the bottom left, there are icons for a folder (20071 -), a plus sign, a leaf, and a pencil, along with a tree structure icon and the text '20002 -'.

The Find Value page is displayed below.



The screenshot shows the 'Find Value' page. It has two main sections: 'Find Tree Node' and 'Find Detail Value', separated by an 'OR' indicator. The 'Find Tree Node' section has a 'Tree Node' field with a magnifying glass icon and a 'Description' field. The 'Find Detail Value' section has a 'Department' field and a 'Description' field. Below these fields are two checkboxes: 'Case Sensitive Search' (unchecked) and 'Exact Matching' (checked). At the bottom are 'Find' and 'Close' buttons. Two callout boxes provide instructions: one points to the magnifying glass icon in the 'Tree Node' field, stating 'To search for Hierarchy: Enter the Hierarchy number here. Or you may use the magnifying glass to look up all the existing Hierarchy nodes and select the Hierarchy from the lookup table. Then click on the Find button.' The other callout points to the 'Department' field, stating 'To search for Department: Enter the DeptID here, and then click on the Find button.'

*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.

### Tree Manager

<b>SetID:</b>	00010	<b>Last Audit:</b>	Valid Tree
<b>Effective Date:</b>	03/09/2009	<b>Status:</b>	Active
<b>Tree Name:</b>	CG_CARD_HIERARCHY		CredCard Acct Coord Hierarchy

---

[Save As](#) [Close](#)      [Tree Definition](#) [Display Options](#) [Print Format](#)

---

[20071](#) > [20002](#) > [31120](#) > **31258**

[Collapse All](#) | [Expand All](#)      [Find](#)      First Page 60 of 5700 [Last Page](#)

- 31258-**
- [000639] - CG ISC ALAMEDA
- [000716] - CGIS PACIFIC REG
- [000826] - F/SWO22-FEDERAL BLDG
- [000843] - F/SWC1
- [000845] - F/SWC3
- [000846] - F/SWC4
- [000872]
- [000884]
- [000885]
- [000913]
- [002278] - SPRTCN ALAM HLTH SVCS
- [002518] - D11 TELECOMMS (DT)
- [002690] - D11 MARINE SFTY DIV(M)
- [002963] - ISC SANPE PERSDIV(PF)
- [002971] - ISC ALAME CMD STAFF(C)
- [002972] - ISC ALAME PERSDIV(P)
- [002973] - ISC ALAME PERSDIV(PW)
- [002974] - ISC ALAME PERSDIV(PA)
- [002975] - ISC ALAME PERSDIV(PP)

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

**Tree Manager**

**SetID:** 00010      **Last Audit:** Valid Tree  
**Effective Date:** 03/09/2009      **Status:** Active  
**Tree Name:** CG\_CARD\_HIERARCHY      CredCard Acct Coord Hierarchy

---

[Save As](#)   [Close](#)      [Tree Definition](#)   [Display Options](#)   [Print Format](#)

---

[20071](#) > [20002](#) > [31120](#) > [31273](#) > **Detail**

[Collapse All](#) | [Expand All](#)      [Find](#)      [First Page](#) ◀ 42 of 5700 ▶ [Last Page](#)

├─ [000589] - CG TACLET NORTH   

├─ 31250 -

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:

**Tree Manager**

**SetID:** 00010      **Last Audit:** Valid Tree  
**Effective Date:** 03/09/2009      **Status:** Active  
**Tree Name:** CG\_CARD\_HIERARCHY      CredCard Acct Coord Hierarchy

---

[Save As](#)   [Close](#)      [Tree Definition](#)   [Display Options](#)   [Print Format](#)

---

[20071](#) > [20002](#) > [31120](#) > **31273**

[Collapse All](#) | [Expand All](#)      [Find](#)      [First Page](#) ◀ 44 of 5700 ▶ [Last Page](#)

├─ 31273 -   

├─ [000162] - CG AIRSTA SAN FRANCISCO

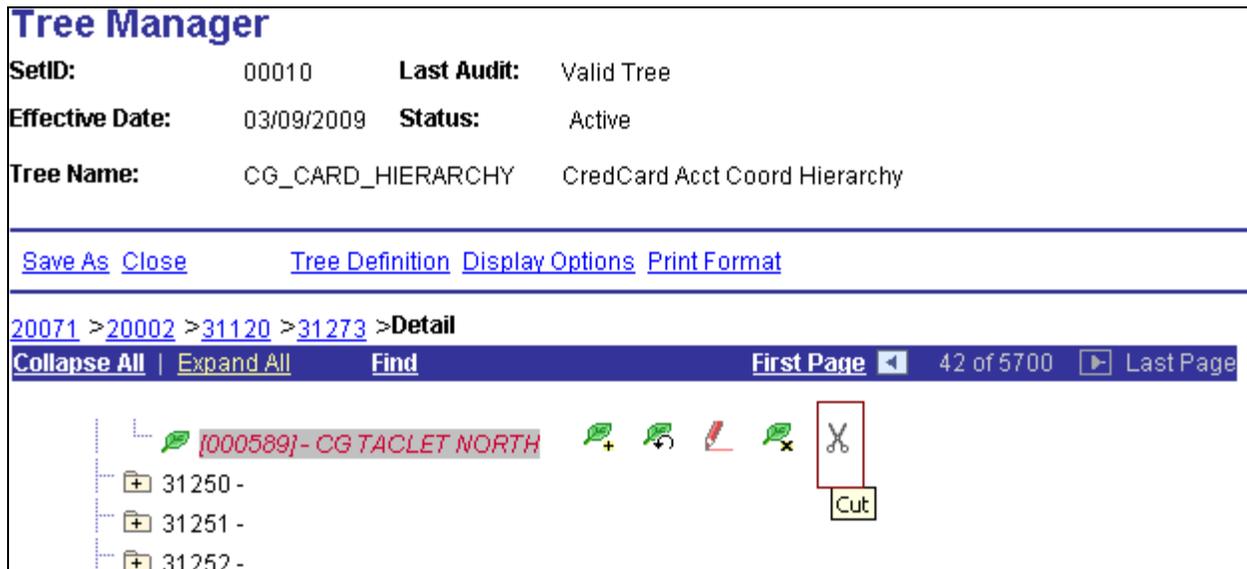
├─ [000589] - CG TACLET NORTH

├─ 31250 -

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).



**Tree Manager**

**SetID:** 00010      **Last Audit:** Valid Tree  
**Effective Date:** 03/09/2009      **Status:** Active  
**Tree Name:** CG\_CARD\_HIERARCHY      CredCard Acct Coord Hierarchy

[Save As](#) [Close](#)      [Tree Definition](#) [Display Options](#) [Print Format](#)

20071 > 20002 > 31120 > 31273 > Detail

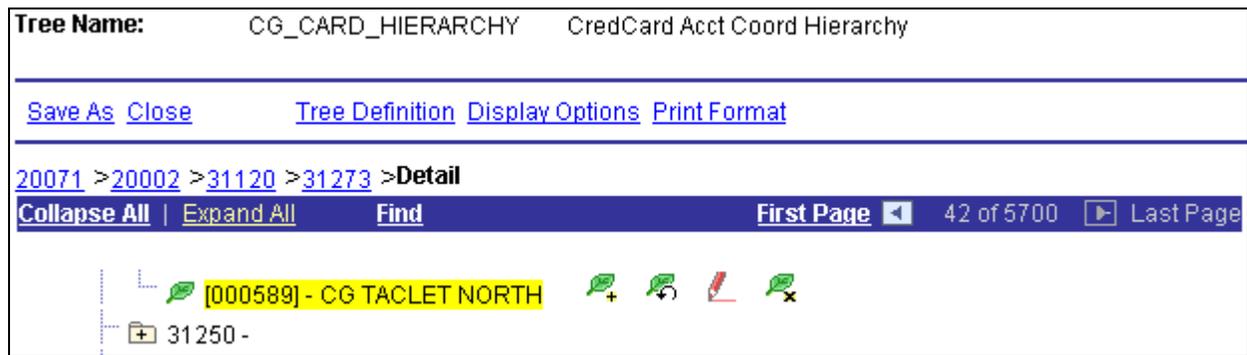
[Collapse All](#) | [Expand All](#)      [Find](#)      [First Page](#) ◀ 42 of 5700 ▶ [Last Page](#)

[+] 31250 -  
[+] 31251 -  
[+] 31252 -

[000589] - CG TACLET NORTH    +    ↺    ✎    ✖    ✂

Cut

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



**Tree Name:** CG\_CARD\_HIERARCHY      CredCard Acct Coord Hierarchy

[Save As](#) [Close](#)      [Tree Definition](#) [Display Options](#) [Print Format](#)

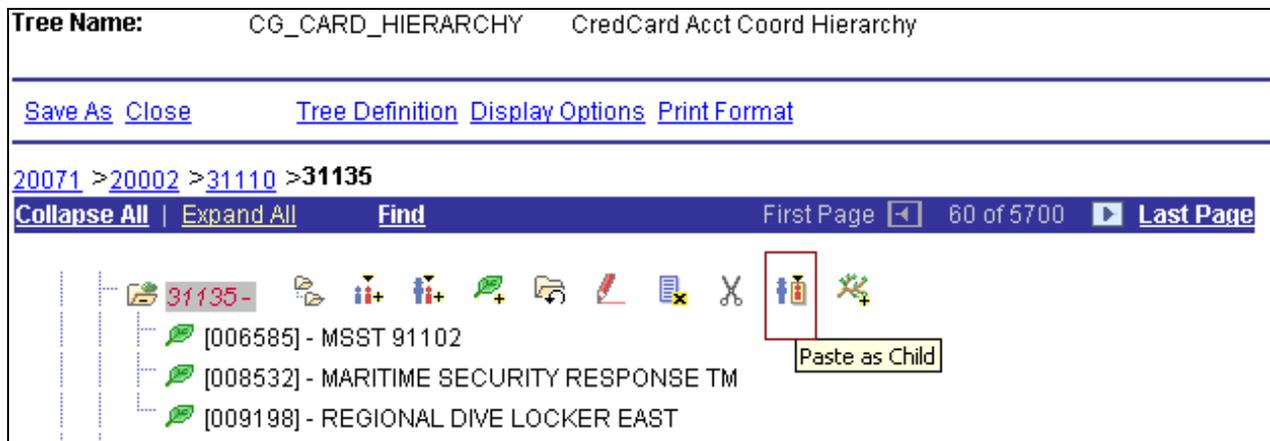
20071 > 20002 > 31120 > 31273 > Detail

[Collapse All](#) | [Expand All](#)      [Find](#)      [First Page](#) ◀ 42 of 5700 ▶ [Last Page](#)

[+] 31250 -

[000589] - CG TACLET NORTH    +    ↺    ✎    ✖

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



**Tree Name:** CG\_CARD\_HIERARCHY      CredCard Acct Coord Hierarchy

[Save As](#) [Close](#)      [Tree Definition](#) [Display Options](#) [Print Format](#)

20071 > 20002 > 31110 > 31135

[Collapse All](#) | [Expand All](#)      [Find](#)      [First Page](#) ◀ 60 of 5700 ▶ [Last Page](#)

[31135] -    ↺    ↻    +    +    +    ↺    ✎    ✖    ✂    +    ✂

[006585] - MSST 91102  
[008532] - MARITIME SECURITY RESPONSE TM  
[009198] - REGIONAL DIVE LOCKER EAST

Paste as Child

Click on the icon, Paste as Child.

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

**Tree Name:** CG\_CARD\_HIERARCHY CredCard Acct Coord Hierarchy

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[Save Draft](#) | [Save](#) | [Save As](#) | [Close](#) | [Tree Definition](#) | [Display Options](#) | [Print Format](#)

---

20071 > 20002 > 31110 > **31135**

[Collapse All](#) | [Expand All](#) | **Find** | First Page | 60 of 5700 | Last Page

---

 **31135-**          

-  [000589] - CG TACLET NORTH
-  [006585] - MSST 91102
-  [008532] - MARITIME SECURITY RESPONSE TM
-  [009198] - REGIONAL DIVE LOCKER EAST

## How to Save Changes to the Tree

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



The screenshot shows the top of the hierarchy tree interface. At the top, it says "Tree Name: CG\_CARD\_HIERARCHY CredCard Acct Coord Hierarchy". Below this is a menu bar with several options: "Save Draft", "Save", "Save As", "Close", "Tree Definition", "Display Options", and "Print Format". The "Save" option is highlighted with a red circle. Below the menu bar, there is a breadcrumb trail: "20071 > 20002 > 31110 > 31135". Below the breadcrumb trail, there is a navigation bar with "Collapse All", "Expand All", "Find", "First Page", "60 of 5700", and "Last Page". Below the navigation bar, there is a tree view with a root node "31135-" and three child nodes: "[000589] - CG TACLET NORTH", "[006585] - MSST 91102", and "[008532] - MARITIME SECURITY RESPONSE TM".

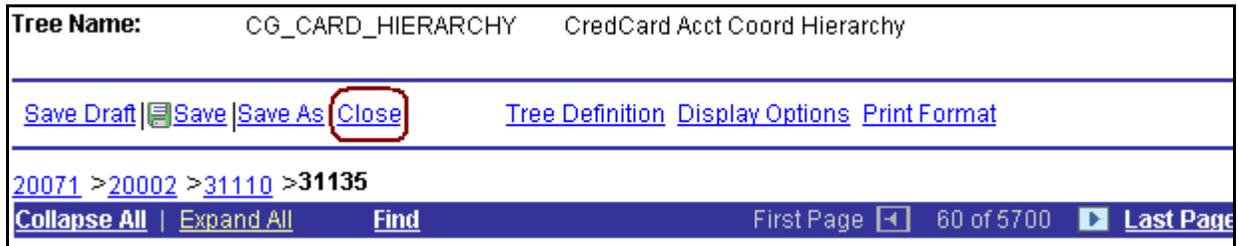
If you are sure of your changes to the tree, click on Save. This will save the tree with your changes. After the tree is saved, notice the Save links change.



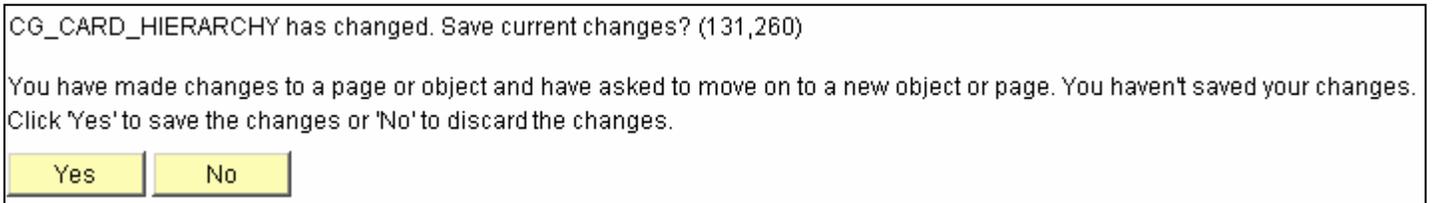
The screenshot shows the top of the hierarchy tree interface after saving. At the top, it says "Tree Name: CG\_CARD\_HIERARCHY CredCard Acct Coord Hierarchy". Below this is a menu bar with several options: "Save As", "Close", "Tree Definition", "Display Options", and "Print Format". The "Save As" and "Close" options are highlighted with a red circle. Below the menu bar, there is a breadcrumb trail: "20071 > 20002 > 31110 > 31135". Below the breadcrumb trail, there is a navigation bar with "Collapse All", "Expand All", "Find", "First Page", and "6". Below the navigation bar, there is a tree view with a root node "31135-" and two child nodes: "[000589] - CG TACLET NORTH" and "[006585] - MSST 91102".

## 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.

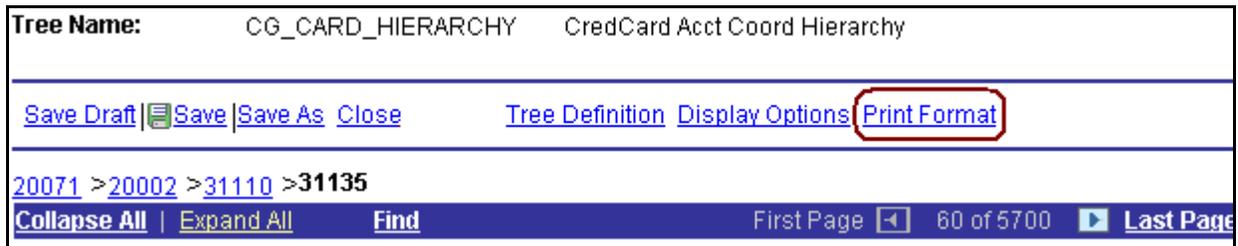
The tree will close.

## 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 your 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	<b>Dept Missing from Hierarchy</b>		638		
2	<b>DeptID</b>	<b>Description</b>	<b>Location</b>	<b>City</b>	<b>State</b>
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
11	006476	DD ANCHORAGE PUBLIC AFFAIRS	AK0888	ANCHORAGE	AK

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.

### Find Value

**Find Tree Node**  
Tree Node:    
Description:

**OR**

**Find Detail Value**  
Department:   
Description:

Case Sensitive Search  
 Exact Matching

The 31185 node is displayed as follows:

The screenshot shows a web-based interface for a hierarchy tree. At the top, it says "Tree Name: CG\_CARD\_HIERARCHY CredCard Acct Coord Hierarchy". Below that are links for "Save As", "Close", "Tree Definition", "Display Options", and "Print Format". The breadcrumb path is "20071 > 20002 > 31110 > 31185". A navigation bar includes "Collapse All", "Expand All", "Find", "First Page", "60 of 5700", and "Last Page". The tree view shows the node "31185-" expanded, with a list of sub-nodes: "[000042] - CG TRACEN YORKTOWN", "[000632] - CG PSU 305", "[000675] - NCWRON 25 YORKTOWN VA", and "[000825] - WWWW". To the right of the "31185-" node is a toolbar with several icons, including a green leaf with a plus sign.

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.

This screenshot is similar to the previous one, but the fourth icon in the toolbar (the green leaf with a plus sign) is highlighted with a red box. A tooltip labeled "Insert Detail" is displayed over this icon. The tree view shows the node "31185-" expanded, with sub-nodes "[000042] - CG TRACEN Y" and "[000632] - CG PSU 305".

Enter 010589 on the following screen:

The "Detail Value Range" dialog box has a title bar with the text "Detail Value Range". It contains the following fields and controls:

- Tree Node:** 31185
- Dynamic Flag**
- Range From:** [010589] (with a search icon)
- \*Range To:** (empty field with a search icon)
- Add** button
- Cancel** button

Click on the Add button.

The screenshot shows the 'Tree Manager' application window. At the top, it displays 'SetID: 00010' and 'Last Audit: Valid Tree'. Below this, 'Effective Date: 03/09/2009' and 'Tree Name: CG\_CARD\_H' are visible. A toolbar contains buttons for 'Save As', 'Close', and 'Tree Def'. The main area shows a breadcrumb path: '20071 > 20002 > 31110 > 31185'. Below the path are 'Collapse All' and 'Expand All' buttons. A tree view shows a node '31185-' expanded, with two sub-nodes: '[000042] - CG TRACEN YORKTOWN' and '[000632] - CG PSU 305'. An error dialog box from 'Microsoft Internet Explorer' is overlaid on the right, with a yellow warning icon and the text: 'Overlapping instances of the detail on 31185. (25,2) The detail entry exists in multiple places. It can only exist in one place. Find the appropriate place and delete all other instances.' An 'OK' button is at the bottom of the dialog.

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.

The 'Find Value' dialog box is shown. It has two sections: 'Find Tree Node' and 'Find Detail Value'. In the 'Find Tree Node' section, there are two input fields: 'Tree Node:' and 'Description:'. In the 'Find Detail Value' section, there are two input fields: 'Department:' (containing '010589') and 'Description:'. Below these sections are two checkboxes: 'Case Sensitive Search' (unchecked) and 'Exact Matching' (checked). At the bottom are two buttons: 'Find' and 'Close'.

Click the Find button. The following is displayed.

The screenshot shows a web-based interface for managing a hierarchy tree. At the top, the 'Tree Name' is 'CG\_CARD\_HIERARCHY' with the subtitle 'CredCard Acct Coord Hierarchy'. Below this is a navigation bar with buttons for 'Save Draft', 'Save', 'Save As', and 'Close', along with links for 'Tree Definition', 'Display Options', and 'Print Format'. The breadcrumb path is '20071 > 20002 > 31110 > 31185 > Detail'. A secondary navigation bar includes 'Collapse All', 'Expand All', 'Find', 'First Page', '54 of 5700', and 'Last Page'. The main area shows a tree structure with a folder icon and the text '31184 -'. A red box highlights a department entry: '[010589] - DD-SFLC ALAMEDA'. To the right of this entry are several icons: a green leaf with a plus sign, a green leaf with a refresh symbol, a red pencil, a green leaf with an 'x', and a pair of scissors.

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.

This screenshot shows the same hierarchy tree interface as above, but with the breadcrumb path changed to '20071 > 20002 > 31110 > 31157'. The secondary navigation bar now shows '41 of 5700'. The tree structure shows a folder icon and the text '31144 -'. Below this folder are two department entries: '[000060] - CG NESU PORTSMOUTH' and '[004772] - MAT - ATLANTIC BEACH'. The same set of icons is visible to the right of the entries.

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

The 'Detail Value Range' dialog box has a title bar with the text 'Detail Value Range'. It contains the following fields and controls:

- 'Tree Node:' with the value '31144'.
- A checkbox labeled 'Dynamic Flag' which is currently unchecked.
- 'Range From:' with a text input field containing '036744' and a magnifying glass icon to its right.
- '\*Range To:' with an empty text input field and a magnifying glass icon to its right.
- At the bottom, there are two buttons: 'Add' and 'Cancel'.

Click the Add button.

**Tree Name:** CG\_CARD\_HIERARCHY CredCard Acct Coord Hierarchy

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[Save Draft](#) | [Save](#) | [Save As](#) | [Close](#) | [Tree Definition](#) | [Display Options](#) | [Print Format](#)

---

20071 > 20002 > 31110 > **31144**

[Collapse All](#) | [Expand All](#) | **Find** | First Page 42 of 5701 Last Page

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31144-

- [036744] - COMMANDANT (CG-5533)
- [000060] - SFLC-IOD-NESUP
- [004772] - SFLC-IOD-NESUP-MWA-MATFM

---

Department is added.



Click on the Delete icon.

**Tree Name:** CG\_CARD\_HIERARCHY CredCard Acct Coord Hierarchy

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[20071](#) > [20002](#) > [31110](#) > [31185](#) > **Detail**

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31184 -

[010589]- DD-SFLC ALAMEDA

Delete

[New Window](#) | [Help](#) |

Delete 010589 ? (49,12)

You have requested that an object be deleted. The system is asking you to verify that you actually want to delete the object. Select Yes to delete the object or No to leave the object alone.

Click Yes. The department is deleted.

**Tree Name:** CG\_CARD\_HIERARCHY CredCard Acct Coord Hierarchy

---

[Save Draft](#) | [Save](#) | [Save As](#) | [Close](#) | [Tree Definition](#) | [Display Options](#) | [Print Format](#)

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[20071](#) > [20002](#) > [31110](#) > [31185](#) > **Detail**

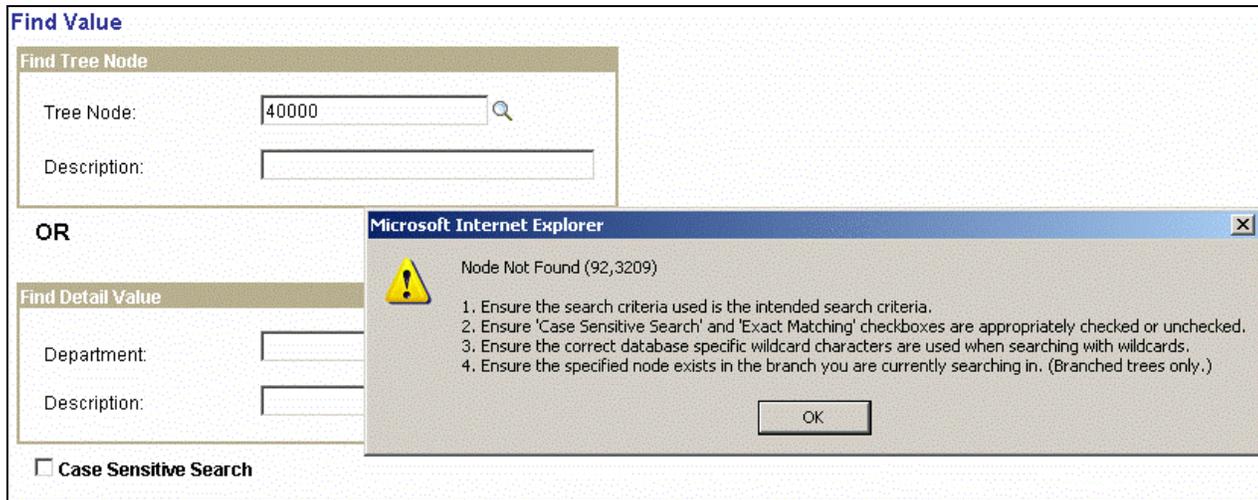
[Collapse All](#) | [Expand All](#) | [Find](#) | [First Page](#) ◀ 60 of 5700 ▶ [Last Page](#)

31184 -

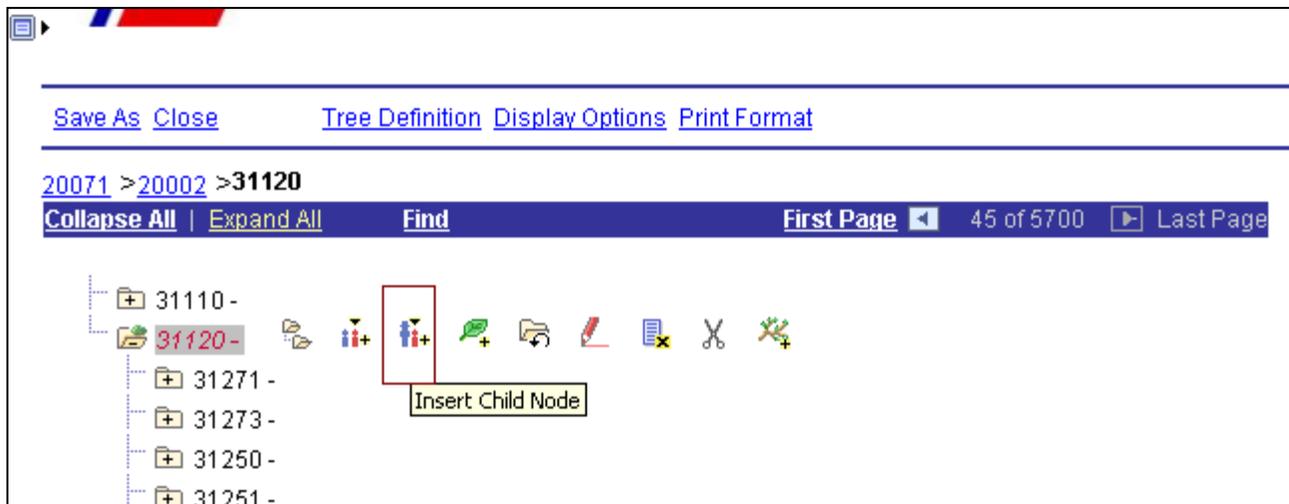
[010351]- DD-HSWL YORKTOWN

## How to Add a Hierarchy

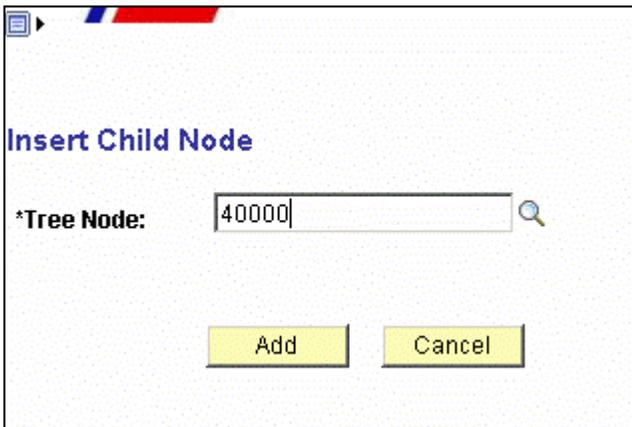
Perform a Find to see if the hierarchy node you wish to add already exists or not.  
If it does not exist, an error message will be displayed.



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).



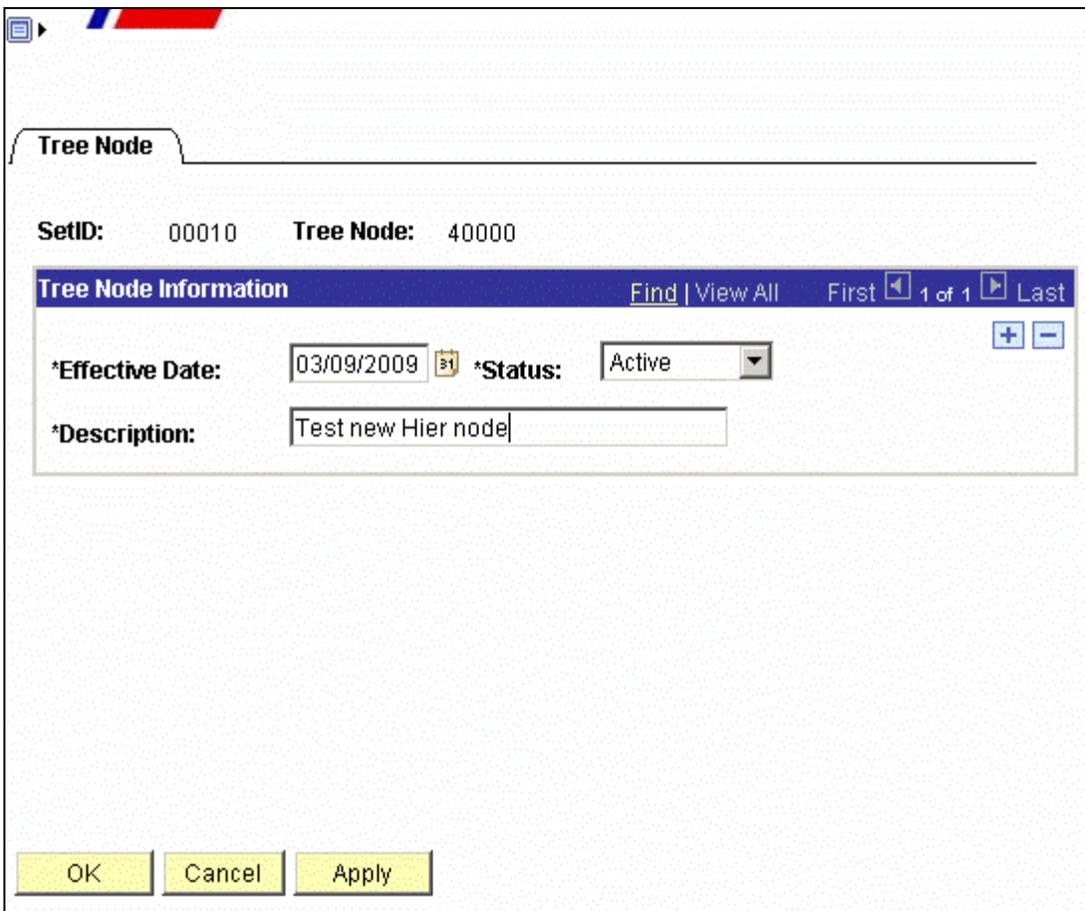
Enter 40000 and click Add.



**Insert Child Node**

\*Tree Node:

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



**Tree Node**

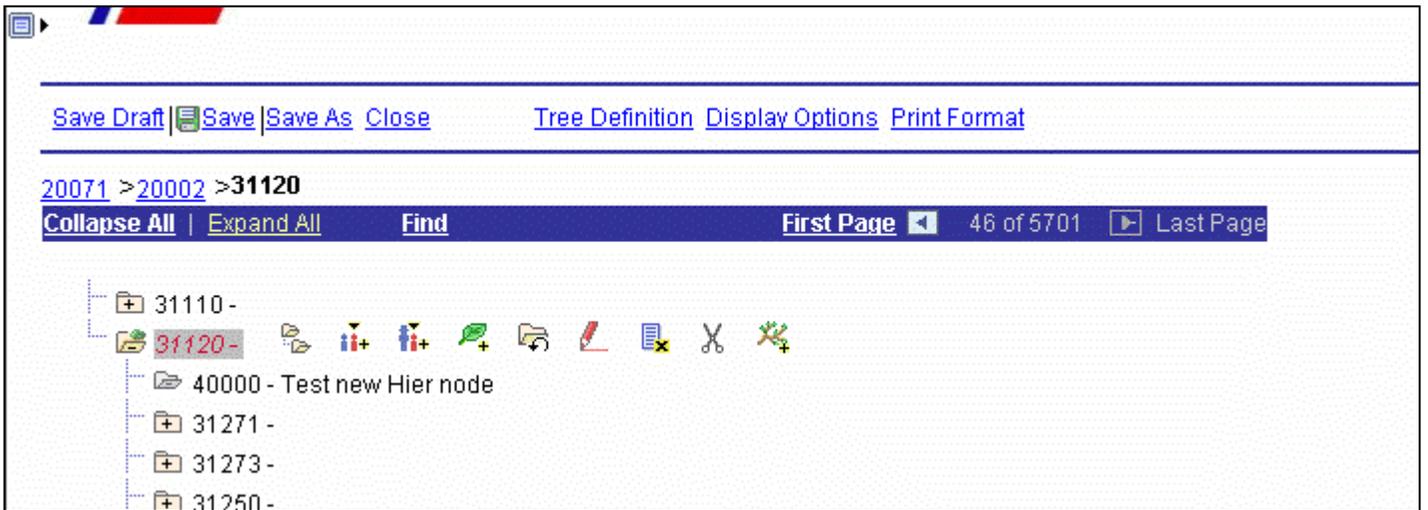
SetID: 00010    Tree Node: 40000

**Tree Node Information**    Find | View All    First 1 of 1 Last

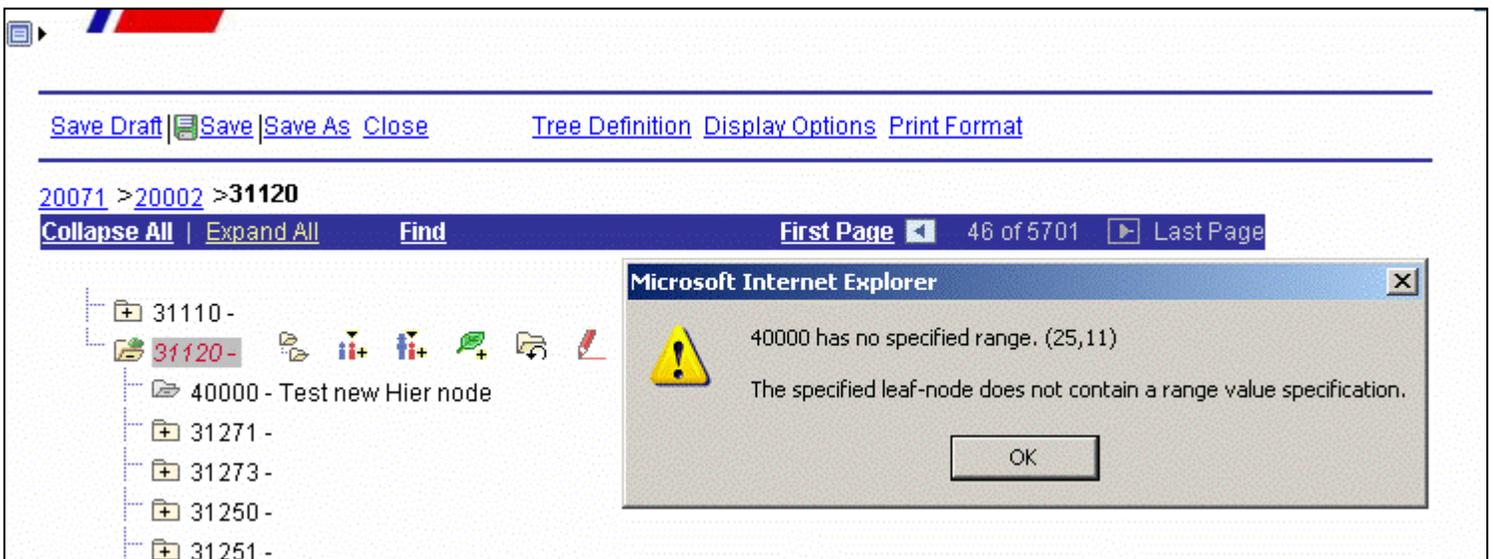
\*Effective Date:  \*Status:

\*Description:

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



## 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

Delete 40005 ? (49,12)

You have requested that an object be deleted. The system is asking you to verify that you actually want to delete the object. Select Yes to delete the object or No to leave th alone.

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.

### Find Value

**Find Tree Node**

Tree Node:  

Description:

**OR**

**Find Detail Value**

Department:

Description:

Case Sensitive Search

**Microsoft Internet Explorer** x

 Node Not Found (92,3209)

1. Ensure the search criteria used is the intended search criteria.  
2. Ensure 'Case Sensitive Search' and 'Exact Matching' checkboxes are appropriately checked or unchecked.  
3. Ensure the correct database specific wildcard characters are used when searching with wildcards.  
4. Ensure the specified node exists in the branch you are currently searching in. (Branched trees only.)