

## 'In Tree' Criteria

The purpose of this job aid is to explain the In Tree function to EPM query users. This job aid assumes that users already understand the basic concepts of creating a query within the Core-CT EPM application. Please refer to other EPM job aids for additional details. The job aids can be found off of the Core-CT Home Page at <http://www.core-ct.state.ct.us/epm>.

### In Tree Overview

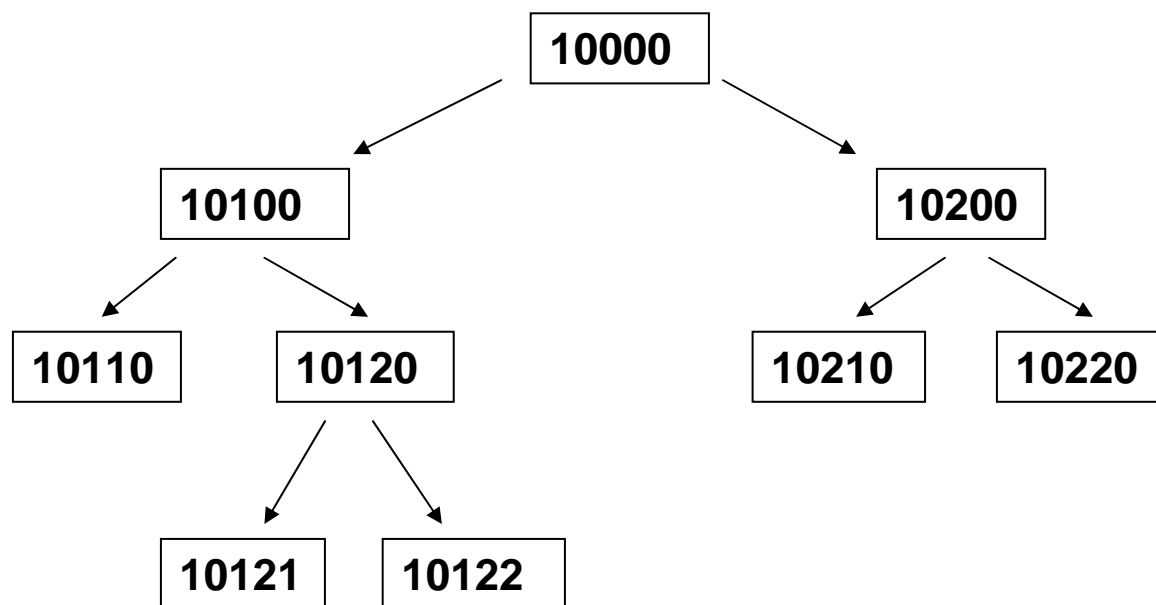
A Tree is a graphical hierarchy within PeopleSoft applications that displays the relationship between items in a group. Within Core-CT, certain data is stored within Trees. This data includes:

- Department
- Account
- Program
- Fund GAAP
- Fund Legal
- SID
- Chartfield 1
- Chartfield 2

The “**In Tree**” function within EPM provides users with the ability to restrict a query result set to only those rows of data which have values that exist within a specific part of a tree (tree node).

For example, a department may be broken up into multiple smaller departments.

### Sample Department Tree



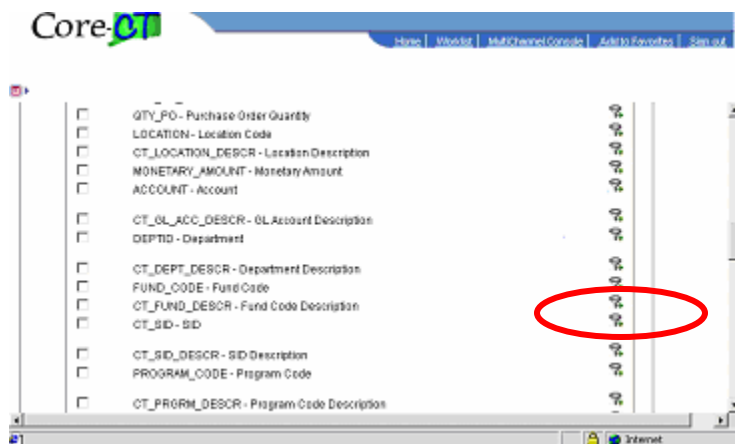
Each department value is considered a tree node. Nodes with “sub-nodes” are considered a parent node. The “sub-nodes” are considered child nodes. A node can be both a parent and child node (e.g. department 10100).

If you want to build a query that returns the Employee IDs for all employees in department 10120, you would use the “In Tree” function and select department 10120. The results would return rows of data where the department values are in the 10120 node or any of its child nodes – 10121 and 10122.

## “In Tree” - Step-by-Step Example

The below example describes how to use “in tree” to view purchase order (PO) information for “Other SID” numbers. NOTE: These steps are the same for any other field where “in tree” applies.

1. Set up “in tree” criteria on the SID field.



2. Once on the [Edit Criteria Properties](#) page, set the **Condition Type** to ‘in tree’ and click the [New Node List](#) hyperlink.

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The screenshot shows a configuration dialog with the following elements:


- Choose Expression 1 Type:** Radio buttons for **Field** (selected) and **Expression**.
- Expression 1:** A sub-dialog titled "Choose Record and Field" with a text box containing "A.ACT\_SID - SID".
- \*Condition Type:** A dropdown menu with "in tree" selected. This element is circled in red.
- Choose Expression 2 Type:** Radio buttons for **Tree Option** (selected) and **Expression**.
- Expression 2:** A sub-dialog titled "Select Tree Node List" with a "Node List:" label and a checkbox for "Display Detail Values". A blue link "New Node List" is next to the checkbox. This link is circled in red.
- Buttons:** "OK" and "Cancel" buttons.

3. Select the appropriate **Tree Name**; in this case, the CT\_SID tree.


The screenshot shows a "Select a Tree" dialog with a table of tree configurations. The "CT\_SID" entry is circled in red.

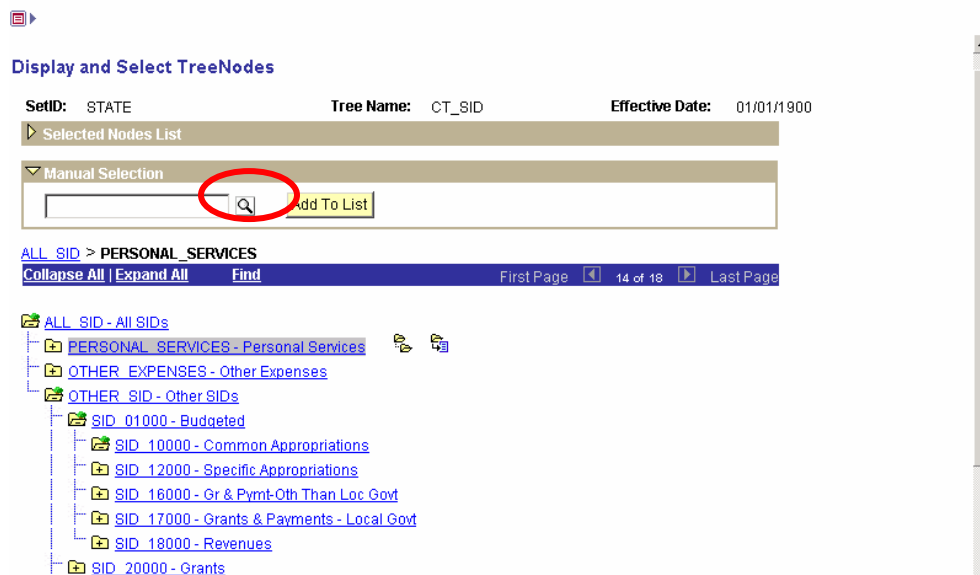
Tree Name	SetID	SetControlValue	Effective Date	Description	Saved As
<a href="#">CT_DEPT_A2</a>	STATE		01/01/1900	Reporting Tree for Agency 2	Valid Tree
<a href="#">CT_FUND_GAAP</a>	STATE		01/01/1900	Fund GAAP Tree	Valid Tree
<b><a href="#">CT_SID</a></b>	STATE		01/01/1900	SID Tree	Valid Tree
<a href="#">CT_DEPT</a>	STATE		01/01/1900	DEPARTMENT TREE	Valid Tree
<a href="#">CT_ACCOUNT</a>	STATE		01/01/1900	CT Account Tree	Valid Tree
<a href="#">CT_FUND_LEGAL</a>	STATE		01/01/1900	Fund Legal Tree	Valid Tree
<a href="#">CT_CF1</a>	STATE		01/01/1900	CHARTIFIELD 1 TREE	Valid Tree
<a href="#">CT_DEPT_A1</a>	STATE		01/01/1900	Reporting Tree for Agency 1	Valid Tree
<a href="#">CT_PROG</a>	STATE		01/01/1900	PROGRAM TREE	Valid Tree
<a href="#">CT_CF2</a>	STATE		01/01/1900	CHARTIFIELD2 TREE	Valid Tree

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4a. Click on the **yellow folders**, to navigate within the tree. Once you have navigated to the appropriate node you can select it by clicking  next to the desired node.

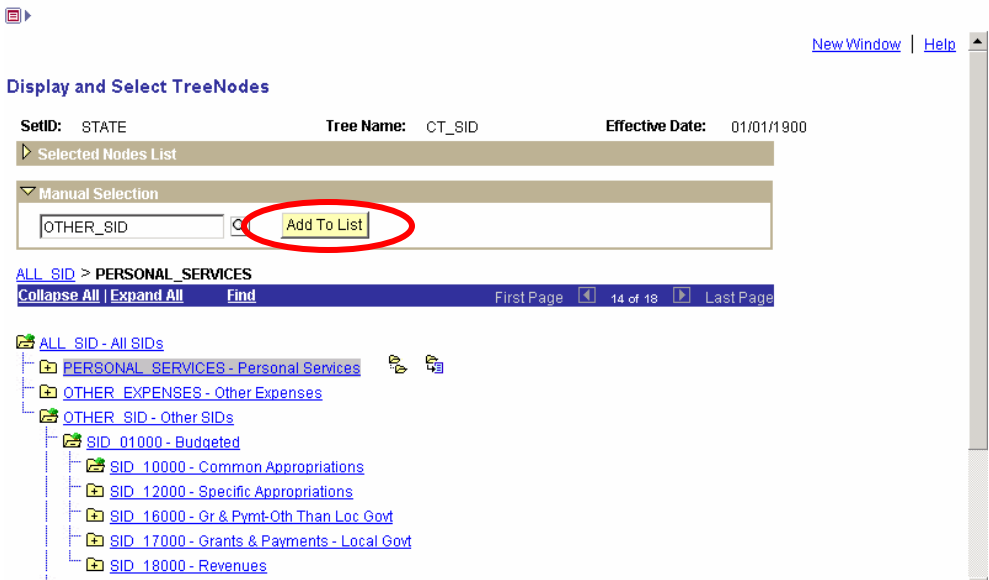


4b. Or you can navigate and select the desired node(s) by using the **Manual Selection group box**. To manually select a node click  in the **Manual selection group box**.

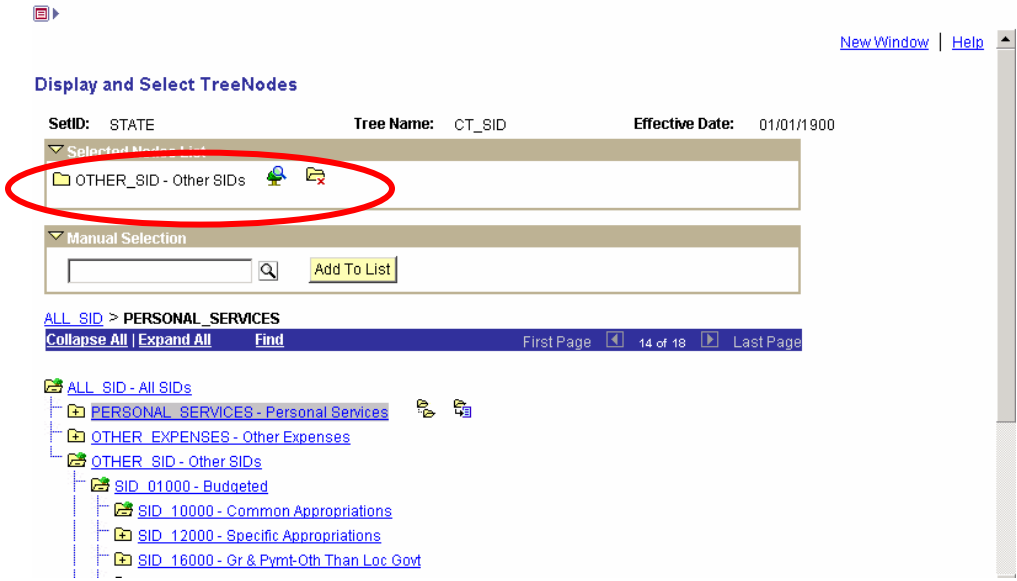


5. Once you've found the desired node, click on it. The selected node will appear under the **Manual Selection group box**. To include the node in your criteria, click on the **Add to List** button.

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6. The selected node will now display under the **Selected Nodes** group box.



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7. To confirm your node selection click  on the bottom of the page.

8. You are returned to the Edit Criteria Properties page. Click  to re-confirm the 'in tree' criteria.

9. The query results will be restricted to PO results that contain a SID within the "Other SID" tree node.