

### Purpose

The purpose of this document is to describe the terminology and process for updating the PeopleSoft tree at the University of Missouri – St. Louis.

### Online Documents

The change form is available at [http://www.umsl.edu/~ir/assets/excel/UM\\_St\\_Louis\\_Structure\\_Change\\_Form.xls](http://www.umsl.edu/~ir/assets/excel/UM_St_Louis_Structure_Change_Form.xls). The current tree is available at <http://www.umsl.edu/~ir/assets/PDFs/Tree.pdf>.

### Terminology

As implemented at the University of Missouri, the PeopleSoft tree is a hierarchical structure consisting of nodes at six levels that reflect the organizational structure of the University. The node levels are:

1. ALL – this level encompasses the entire University.
2. BUSINESS UNIT – this level includes major organizational entities within the University, e.g., the campuses, System Administration, and Outreach.
3. VC/VP – this level represents the Vice Chancellor and Vice Presidential levels within a major organizational entity.
4. CSD – this level represents Colleges, Schools, and Divisions reporting to a Vice Chancellor or Vice President.
5. DEPT – this level represents departments reporting to a College, School, or Division.
6. SUBDEPT – this level is a sub-department within a department and is optional.

DEPTIDs represent the lowest level on the tree and are associated with either a DEPT or SUBDEPT level node. All higher level nodes must exist before a lower level node can be established. Every branch of the tree must have one or more DEPTIDs.

A node path is the combination of nodes, e.g., Business Unit, VC/VP, CSD, DEPT, to completely describe the path through the hierarchy to reach the desired node.

### Moving Nodes Between Units

Whenever a request is received to move a node between units, the move will be verified with the Senior Fiscal Officers in both units prior to review. Moves will not be processed until all questions are resolved.

Process

Tree change forms are processed as follows:

1. Senior Fiscal Officer of the unit prepares the form.
2. The form is sent to Institutional Research (email to [larry\\_westermeyer@umsl.edu](mailto:larry_westermeyer@umsl.edu)).
3. Institutional Research reviews the form for completeness and consistency.
4. If the change impacts another unit, the change is reviewed with the Senior Fiscal Officer in the other unit.
5. The form is sent to representatives from Accounting, Budget, Human Resources, and Student Records for review and comment.
6. Approved forms are sent to UM Accounting for input with a copy to the review team, the originator and, if applicable, the receiving Senior Fiscal Officer.

Timeline

UM Accounting must receive changes by the 5<sup>th</sup> of the month for inclusion on the following month's tree. Therefore, to allow time for campus review, changes must be submitted to Institutional Research by the 2<sup>nd</sup> of the month prior to the month in which the change is to be effective.

Actions

The following actions may be taken (one per form, please):

- Change a node description.
- Inactivate a node.
- Add a node.
- Move a node.
- Move a DEPTID.

Other actions, such as obtaining a new DEPTID, inactivating a DEPTID, and changing a DEPTID description, are performed by Accounting Services.

Detailed Directions

The submitting Senior Fiscal Officer should enter their name in “Submitted by:” along with the current date in “Date:”. Check the box specifying the action to be taken.

**Change a node description**

- Enter the current node path in column 1 with the corresponding current description at each level in column 2.
- Enter the new description in column 4.

**Inactivate a node**

- Enter the current node path in column 1 with the corresponding current description at each level in column 2.
- The last node entered will be inactivated.
- Note: all lower level nodes and DEPTIDs associated with the node to be deactivated must either be inactivated or moved to an active node. For example, if you wanted to inactivate a DEPT level node with two SUBDEPT nodes and the SUBDEPT nodes each have four DEPTIDs, you would need to:
  - Inactivate or move the eight DEPTIDS.
  - Inactivate both SUBDEPT nodes.
  - Inactivate the DEPT node.

**Add a node**

- Enter the new node path in column 3 with the corresponding description in column 4 and the address of the node in column 4 of the “Address:” line.
- Remember that each path must be built from the top down and all higher level nodes must be in place before adding a lower level node.
- Each branch of the tree must end with at least one DEPTID associated with the DEPT or SUBDEPT node.

**Move a node**

- Enter the current node path in column 1 with the corresponding current description at each level in column 2.
- Enter the new node path in column 3 with the corresponding new description at each level in column 4.
- Enter the current and new address in columns 2 and 4 (respectively) of the “Address:” line.

**Move a DEPTID**

- Enter the current node path in column 1 with the corresponding current description at each level in column 2.
- Enter the new node path in column 3 with the corresponding current description at each level in column 4.
- Specify the DEPTIDs or DEPTID range to be moved.