

CAPPS Desk Aid

Adding a New PCA to Tree Manager

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Adding a New PCA to Tree Manager

Overview

This desk aid provides instructions for adding a new program cost account (PCA) under an appropriation number into the general ledger Tree Manager tool.

The user must have the security/job profile TX_FIN_GL_CFG_TREES_UDA.

Adding a New PCA to Tree Manager

Navigation

Main Menu: Financials; Tree Manager; Tree Manager

1. Select the *Find an Existing Tree* tab.
2. Enter the Business Unit (BU) in the SETID field.
3. Select **Search**.

Tree Manager

Find an Existing Tree Create New Tree

Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches | Saved Searches: Choose from saved searches

Tree Name: begins with | SETID: [redacted] | Set Control Value: begins with | Effective Date: | Tree Branch: begins with | Description: begins with | Category: begins with | Tree Structure ID: begins with | Valid Tree: | Node Field: begins with | Detail Field: begins with | [Show fewer options](#)

☐ Case Sensitive

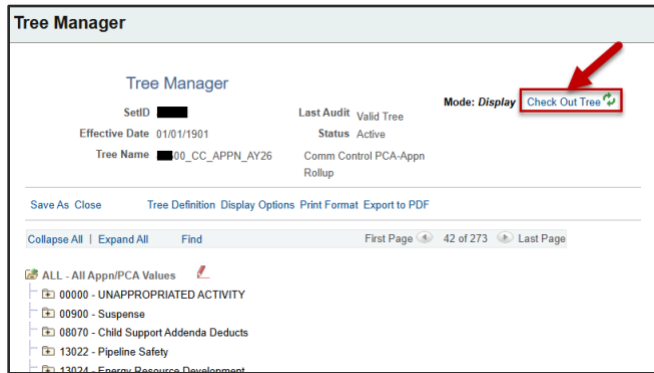
Search **Clear**

4. Select the **Appropriation Tree Name** (e.g., xxx00_CC_APPROP).

Tree Name	SetID	Set Control Value	Effective Date	Tree Branch	Description	Category
00_CC_ACCOUNT		(blank)	01/01/1901	(blank)	Comm Control Account Rollup	COMMITMENT_CTRL
00_CC_ACCT_AY22		(blank)	01/01/1901	(blank)	Comm Control Account Rollup	COMMITMENT_CTRL
00_CC_ACCT_AY24		(blank)	01/01/1901	(blank)	Comm Control Account Rollup	COMMITMENT_CTRL
00_CC_ACCT_AY26		(blank)	01/01/1901	(blank)	Comm Control Account Rollup	COMMITMENT_CTRL
00_CC_ACCT_LBB		(blank)	01/01/1901	(blank)	Comm Control Account Rollup	COMMITMENT_CTRL
00_CC_ACCT_REV		(blank)	01/01/1901	(blank)	Comm Control Rev Acct Rollup	COMMITMENT_CTRL
00_CC_APPN		(blank)	01/01/1901	(blank)	Comm Control PCA-Appn Rollup	COMMITMENT_CTRL
00_CC_APPN_AY22		(blank)	01/01/1901	(blank)	Comm Control PCA-Appn Rollup	COMMITMENT_CTRL
00_CC_APPN_AY24		(blank)	01/01/1901	(blank)	Comm Control PCA-Appn Rollup	COMMITMENT_CTRL
00_CC_APPN_AY26		(blank)	01/01/1901	(blank)	Comm Control PCA-Appn Rollup	COMMITMENT_CTRL

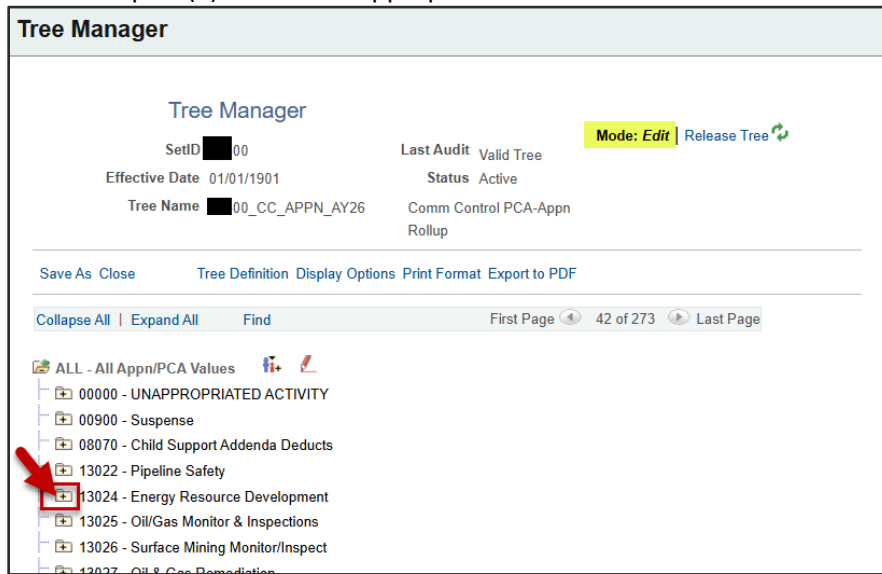
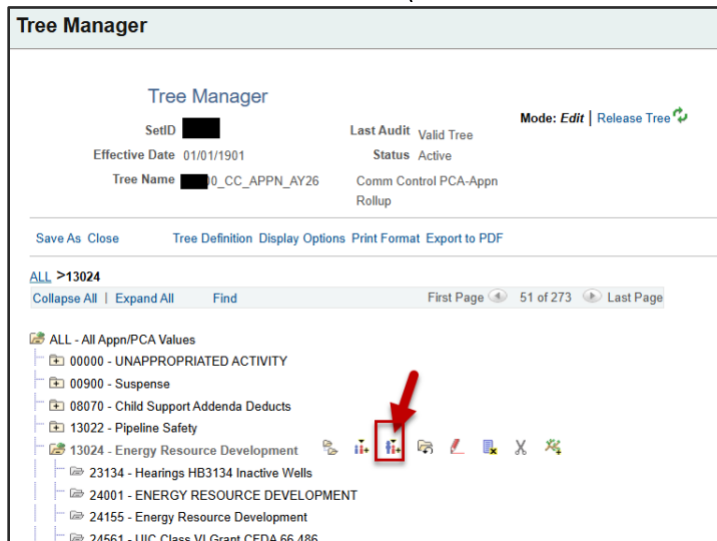
Note: The xxx00 represents the agency's business unit. In addition, the **Appropriation Tree Name** may vary per agency.

The *Tree Manager* page for the selected tree displays.

5. Select **Check Out Tree**.

The MODE field updates to Edit.

6. Select the plus (+) icon in the appropriation number folder.

7. Select the **Insert Child Node** icon (third icon from the left next to the appropriation folder name).

The *Insert Child Node* window displays.

8. Enter the new PCA in the TREE NODE field.

Insert Child Node

*Tree Node:

9. Select **Add**.

The *Class Field CF* page displays.

10. Enter 01/01/1901 in the EFFECTIVE DATE field.

Class Field CF

SetID: [redacted] Appropriation/PCA: 24002

Effective Date	Status	Description	Short Description	Budgetary Only	Attributes	Long Description
01/01/1901	Active	TEST		☐	Attributes	Long Description

11. Enter a DESCRIPTION.

12. Select **OK**.

The *Tree Manager* page displays.

13. Select **Save**.

Tree Manager

SetID: [redacted] Last Audit: Valid Tree Mode: Edit | Release Tree

Effective Date: 01/01/1901 Status: Active

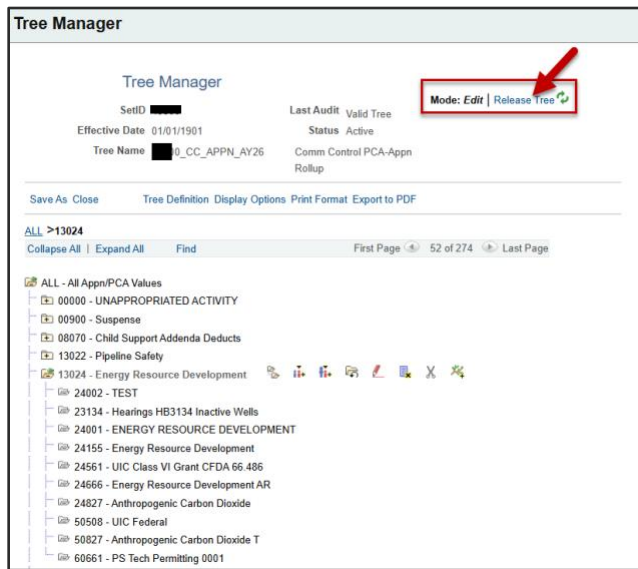
Tree Name: [redacted]_CC_APPN_AY26 Comm Control PCA-Appn Rollup

Save Draft | **Save** | Save As | Close | Tree Definition | Display Options | Print Format | Export to PDF

ALL >13024

Collapse All | Expand All | Find | First Page | 52 of 274 | Last Page

- ALL - All Appn/PCA Values
 - 00000 - UNAPPROPRIATED ACTIVITY
 - 00900 - Suspense
 - 08070 - Child Support Addenda Deducts
 - 13022 - Pipeline Safety
 - 13024 - Energy Resource Development
 - 24002 - TEST
 - 23134 - Hearings HB3134 Inactive Wells
 - 24001 - ENERGY RESOURCE DEVELOPMENT
 - 24155 - Energy Resource Development
 - 24561 - UIC Class VI Grant CFDA 66 486
 - 24666 - Energy Resource Development AR
 - 24827 - Anthropogenic Carbon Dioxide
 - 50508 - UIC Federal
 - 50827 - Anthropogenic Carbon Dioxide T
 - 60661 - PS Tech Permitting 0001

14. Select **Release Tree**.

Verify the PCA Was Added

Navigation

Main Menu: Financials; Tree Manager; Tree Manager

1. Enter the BU for the `SETID`.
2. Select **Search**.
3. Select the **Appropriation Tree Name** (e.g., xxx00_CC_APPROP).
4. Select the plus (+) icon in the appropriation number folder.
5. Verify the added PCA is in the list.

Revision History

Date	Description of Change	Changed By
Sept. 24, 2026	Initial document creation	A. Respress