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Purpose

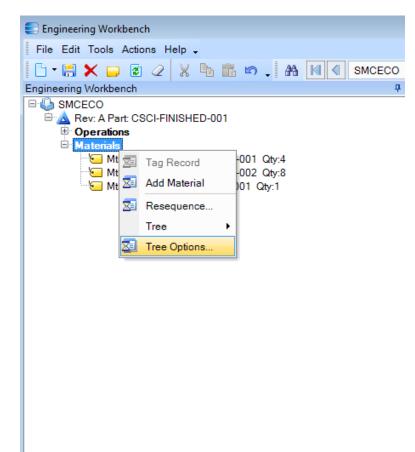
This business process will outline the process for changing the layout and options of the tree display in the Epicor ERP system. In our working example in this document we are changing the tree view in the Engineering Workbench, but the process is the same in all the windows where there is a tree view.



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Navigate to Tree Options

Right click on one of the headings in the tree view and select the Tree Options



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Tree Line to Update

Tree Option:	5					×
Line:	Material		Restore Line to Def	aul	ts	Restore All to Defaults
Preview:	ECO Group		er>			
Available	•	=	lumns			
AltMethod	operation rule				Selected C	olumn Captions
AnalysisC AnalysisC	Resource				Caption	Column
AnswerMt	Resource Title			►	Mtl:	MtlSeq
	Related Material					MtlPartNum
AnswerPu	Material	-			Qty:	QtyPer
APSAddRe APSAttrib1 APSAttrib2 APSAttrib3 APSAttrib4 APSInsert0 APSInsert0 APSSched	Criteria Direction					

Select the line of the tree that you want to change, in our example we are changing the Material line.



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Add a Field to the Line Display

Available Columns	
PullAsAsm	*
PurComment	
QtyPer	
RDEndNum	
RDPrefix	
RDStartNum	
RDSuffix	
ReassignSNAsm	
RelatedECOOprOprSeq	
RelatedOperation	
RelatedStage	
ReqRefDes	
RevisionNum	_
DaviaiaaNua Dad Daaaia	•

In the Available Columns section of the popup window, scroll through the available fields to review what is available and find what you would like to add to the tree line.

Select the field(s) that you want to add to the line display, in our example we are adding the quantity

per component, and click on the *local* arrow to move the field to the selected columns section.

Add a Caption

You can also add a caption; will be displayed before the field on the tree line.

We recommend adding a caption, at least a blank space, to separate the fields.

Caption Column		Selected Column Captions							
Mtl: MtlSeg		Caption	Column						
ina. Inabog		Mtl:	MtlSeq						
MtlPartNum			MtlPartNum						
Qty: QtyPer	►	Qty:	QtyPer						

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Tree Options - Final Result

This is the final result of our example to add the QtyPer field to the material line in the tree display of the Engineering Workbench.

Tree Options								×
Line: Material Preview: Mtt: <mtts< td=""><td>eq> <mtlf< td=""><td>PartNum> (</td><td></td><td>estore Line to De</td><td>efault</td><td>5</td><td>Restore All to Defaults</td><td></td></mtlf<></td></mtts<>	eq> <mtlf< td=""><td>PartNum> (</td><td></td><td>estore Line to De</td><td>efault</td><td>5</td><td>Restore All to Defaults</td><td></td></mtlf<>	PartNum> (estore Line to De	efault	5	Restore All to Defaults	
Available Columns AltMethod AnalysisCdDescriptic AnalysisCode AnswerMtlPartNumQ AnswerPlanAsAsmQu AnswerPullAsAsmQu APSAddResType APSAttrib1 APSAttrib2 APSAttrib2 APSAttrib3 APSAttrib4 APSInsertCriteria APSInsertDirection APSSchedulecNlame	uest uesti iesti	Mt	elected Colum ttSeq ttPartNum tyPer	INS		Selected Caption Mtl: Qty:	Column Captions Column MtlSeq MtlPartNum QtyPer	



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Modified View

Engineering Workbench File Edit Tools Actions Help . 🕒 • 🔚 🗙 🖵 🔊 🖉 🖉 🐰 🐂 🛅 🗂 🖕 👫 🔣 🔇 SMCECO Engineering Workbench д SMCECO E 🔬 Rev: A Part: CSCI-FINISHED-001 Operations Materials 🔚 Mtl: 10 CSCI-PURCHASED-001 Qty:4 12 Mtl: 20 CSCI-PURCHASED-002 Qty:8 Mtl: 30 CSCI-PART-HOLD-001 Qty:1

Above is the modified tree view, note there is a space between the part number and the Qty field to improve readability.



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Remove a Field from the Line Display

	Selected Columns	
	MtlSeq	
	MtlPartNum	
	QtyPer	
1		
J		

In the Selected Columns section of the popup window, select the field that you want to remove from the display.

Click on the arrow to remove the field from the selected columns section.



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Change the order in the Line Display

Selected Columns	
MtlSeq	
MtlPartNum	
QtyPer	

In the Selected Columns section of the popup window, select the field that you want to move from the display.

Use the Line display.



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