Tree Tracker

Municipal Forestry Management Software

User Guide

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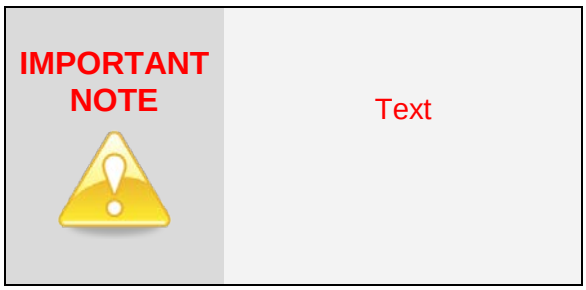
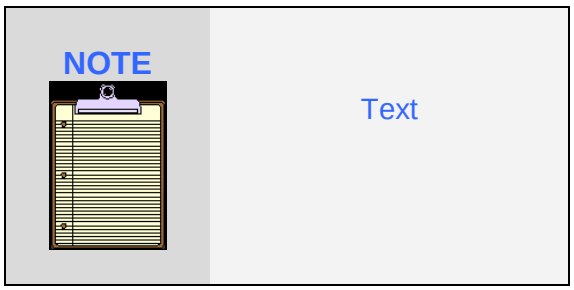
1. About This User Guide

Welcome to Tree Tracker! If you are like most of us, it probably drives you nuts when you consult a user guide and find it woefully lacking in the information you actually need. We have tried very hard to avoid that with this User Guide.

As a result, we have attempted to provide as much detail about Tree Tracker as possible (that's why this User Guide is so long). We have included detailed descriptions of everything you'll need to learn and do in Tree Tracker, and we've included plenty of screenshots from the program to help you along the way.

Periodically, you'll notice these boxes:





In these boxes you will find helpful notes, do's and don'ts, background information, warnings and suggestions to make using Tree Tracker easier. Text in red will cover information that is important for you to know, while text inside a note box that is blue will provide additional background information.

1.1 Navigating The User Guide

If you are reading this User Guide on a computer, there are shortcuts built in to get you to the information you need faster.

- You can click on any item in the table of contents to jump directly to it (you may need to hold down the Ctrl key depending on your version of Windows).
- Whenever the User Guide tells you to go to another section to get more information on a subject, just click on that section number (in blue) and you will jump directly to it.

2. Installing Tree Tracker

Tree Tracker will be delivered to you either electronically or on a CD or DVD. If it is delivered electronically, it may be compressed in a .zip file that you will need to extract before beginning the installation process.

You will need to run the Setup.exe program to begin the installation process. Follow the on-screen instructions to install Tree Tracker.

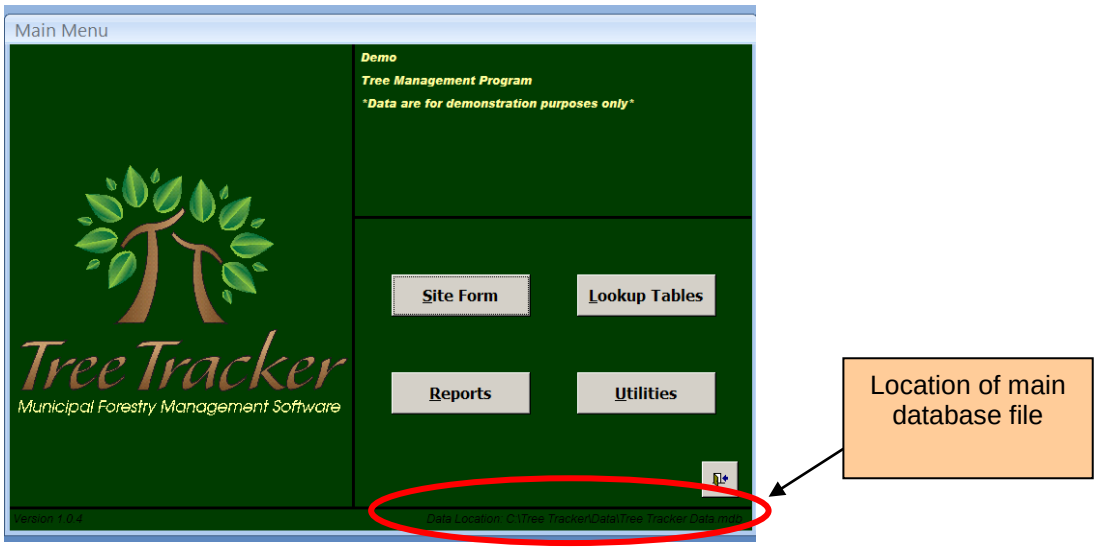
2.1 System Requirements

Tree Tracker reqiures the following in order to operate:

- Computer and processor: 500 megahertz (MHz) processor or higher
- Hard disk space: 500 megabytes (MB)
- Drive: CD-ROM or DVD drive
- Display: 1024x768 or higher resolution monitor
- Operating system: Microsoft Windows XP with Service Pack (SP) 2, Windows Server 2003 with SP1, or later operating system

2.2 Installation Notes

- Tree Tracker installs into the C:\Tree Tracker folder by default.
- The main database file (named Tree Tracker Data.mdb) is installed into the C:\Tree Tracker\Data subfolder by default.
    - When Tree Tracker starts each time, it will look for the main database file (Tree Tracker Data.mdb) at the default location, C:\Tree Tracker\Data. If the data (.mdb) file is not there, Tree Tracker will prompt you to enter the location where the data (.mdb) file is. Once entered, Tree Tracker will then look for the data file at the new location each time the program is started.
- On the main menu screen, the current location of the main database file will be shown:



2.3 Installing onto a Network

When installing Tree Tracker onto a network, there are several additional steps that need to be taken.

- If you wish to use Tree Tracker on multiple computers (multi-user), you MUST **MOVE** the main Tree Tracker database file (Tree Tracker Data.mdb) to a shared network location that is accessible to all computers that will run Tree Tracker.

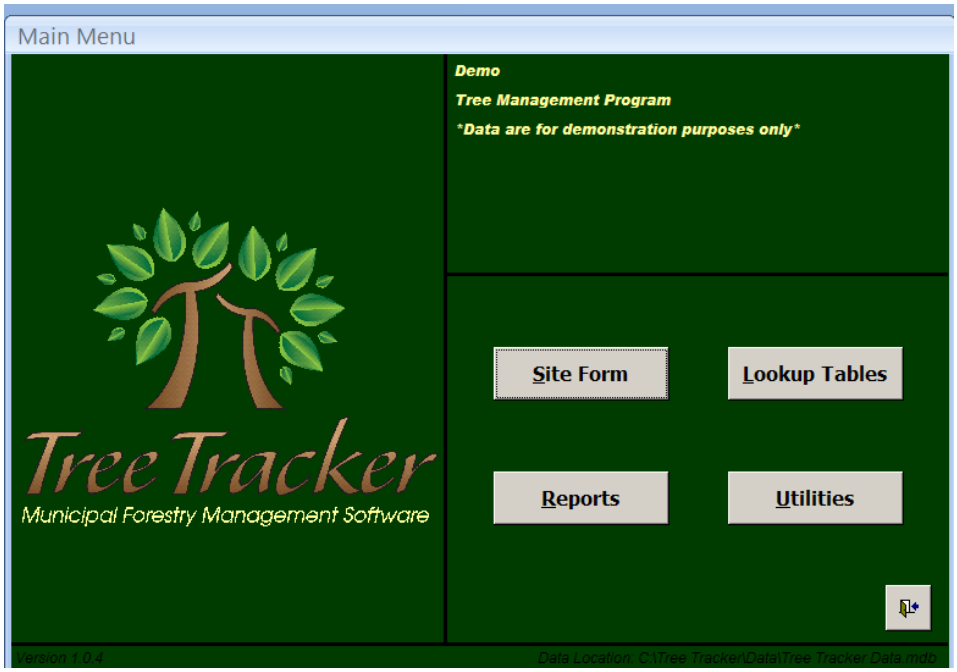
IMPORTANT NOTE	You must CUT and PASTE, not COPY the Tree Tracker Data.mdb data file to the shared network location.

- As you install Tree Tracker on each additional computer, you will need to delete the main database file (Tree Tracker Data.mdb) file from the C:\Tree Tracker\Data folder on each computer.
    - When Tree Tracker starts for the first time on each computer, it will look for the main data file, and when not finding it in the default C:\Tree Tracker\Data folder, it will ask you to input the location of the main data file. You will then need to type the shared network location where the main data file (.mdb) resides.
        - Once the new location of the .mdb file has been entered, Tree Tracker will look for the main data file at the new location from now on for each computer.

IMPORTANT NOTE	When networking computers, it is **very** important that you delete the main data file (.mdb) from the C:\Tree Tracker\Data folder of each networked computer. By **NOT** doing so, each copy of Tree Tracker running on its own computer will be saving information to its own main data file, thus having multiple individual databases and not sharing data entered from other computers.

3. The Main Menu

When you launch Tree Tracker, the first screen will be the main menu. From this screen you can click on one of the four main sections of the program.



Click here to go to the Site Form. The Site Form is the workhorse screen of Tree Tracker. It is the repository for all records of addresses, trees/sites, service requests and work histories. Go to section 4 to learn more about the Site Form.

Click here to go to Lookup Tables. When you have a field in Tree Tracker where you pick from a pre-existing list of items, it is in the Lookup Tables section where you maintain those lists of items. Go to section 5 to learn more about Lookup Tables.

Click here to go to the Report Generator. From this section you can run listing reports or summary reports, add filters, select additional report options, export to Excel and much more. Go to section 6 to learn more about Reports.

Click here to go to Utilities. Tree Tracker's five utilities allow you to perform a Mass Work History Update, export data to I-Tree Streets, backup your database, relink Tree Tracker to the database, and customize program settings. Go to section 7 to learn more about Utilities.

Click here to exit the Tree Tracker program.

4. The Site Form

4.1 What Is the Site Form?

The Site Form is the workhorse screen of Tree Tracker. It is the repository for all records of addresses, trees/sites, service requests and work histories. From this screen you will be able to:

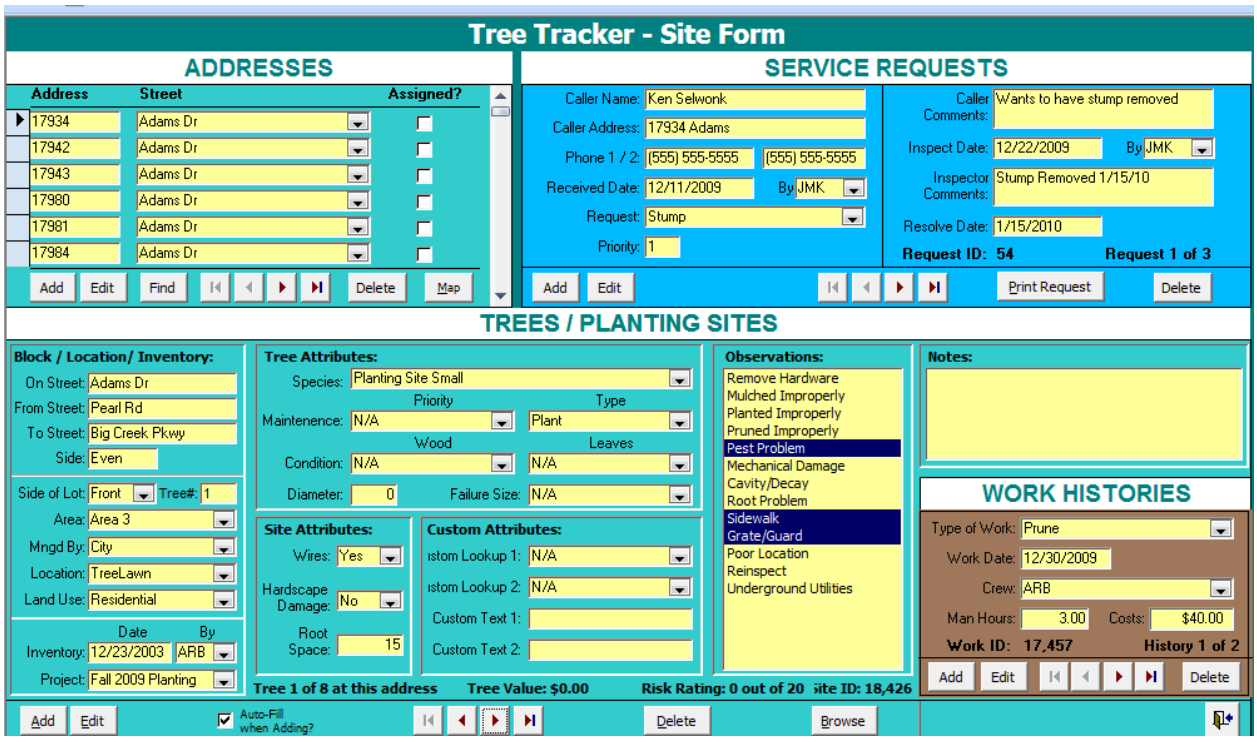
- See all trees/sites at an address
- See the work histories of each tree/site
- Enter service requests for an address and immediately print inspection orders
- See the history of service requests at an address
- Update trees/sites as work is completed
- Enter new addresses, trees and sites

NOTE

A word about the use of the term "trees/sites":

In Tree Tracker an individual record is kept of each tree/site at each address. The reason it is referred to as a tree/site is that each record refers to a single plot of land. That plot of land may contain a tree, a shrub, a stump, or a removed stump, etc. It may also be designated as a planting site. Tree Tracker keeps track of the way in which that plot of land is used, and each plot of land is known in the program as a "tree/site".

Let's first take a look at the main Site Form:

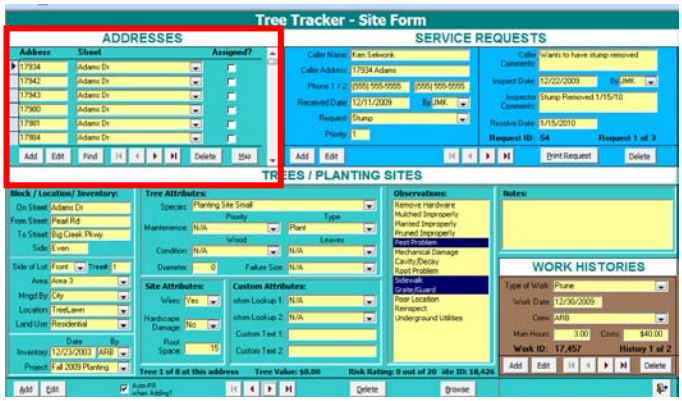


At first, it might look a bit intimidating with all of that information on one screen, but once you look at it one section at a time, you will start to understand the power of Tree Tracker and having all of the information about a given site available on one screen.

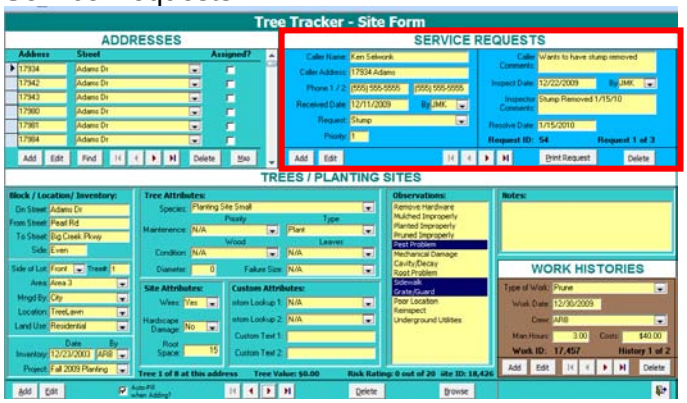
4.2 The Four Sections of the Site Form: A Quick Overview

Here are the four main sections:

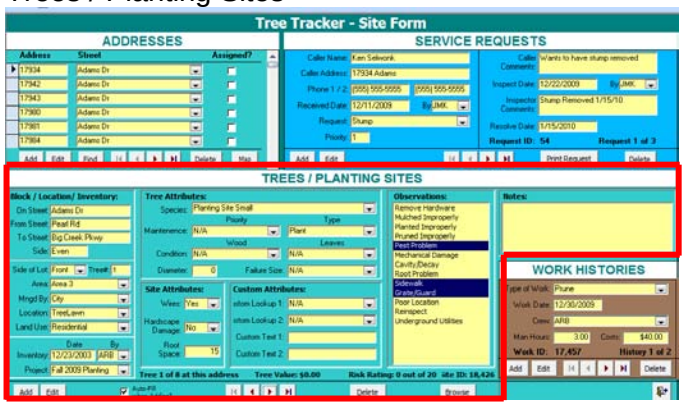
Addresses



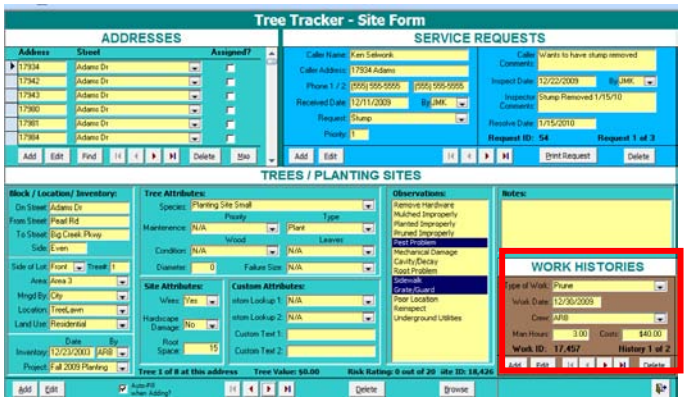
Service Requests



Trees / Planting Sites



Work Histories



Here's a brief description of each of the four sections. Detailed information about each section of the Site Form will follow in sections 4.4 through 4.7.

4.2a Addresses: A Quick Overview

This is the section you will use first to find an address in order to view service requests, trees / planting sites and work histories. Since all of the other sections are tied to a specific address, you must use the Addresses section first to find that address.

This section lists each address in the database. There will most likely be hundreds, if not thousands of addresses in your database.

In this section, you can:

- Scroll up or down or use the "Find" button to find a specific address
- Add, edit or delete an address
- Assign an address if one does not exist
- Map an address on Google Maps®

4.2b Service Requests: A Quick Overview

This section of the Site Form allows you to manage service requests for a specific address. When an address is selected in the Addresses section, any related service requests to that address will appear. Note that there can be multiple service requests for a specific address.

In this section, you can:

- Quickly view the status of a service request
- Add, edit, delete or print service requests
- Navigate between service requests if there are multiple service requests for a specific address

4.2c Trees / Planting Sites: A Quick Overview

This section of the Site Form allows you to manage detailed information about each tree/site for a specific address. When an address is selected in the Addresses section, any related tree/site records for that address will appear, Note that there can be multiple tree/site records for a specific address.

In this section, you can:

- Quickly view the detailed information about a specific tree/site including its location, tree and site attributes, observations, tree value, risk rating and much more
- Add, edit, browse or delete trees/sites
- Navigate between trees/sites if there are multiple trees/sites for a specific address

4.2d Work Histories: A Quick Overview

This section of the Site Form allows you to manage the work history for each tree/site at a specific address. **It is important to note that each work history is associated with a specific tree/site, not a specific address**. If at a specific address there are multiple trees/sites, not all trees/sites may have a work history, but some trees/sites may have multiple work histories.

In this section, you can:

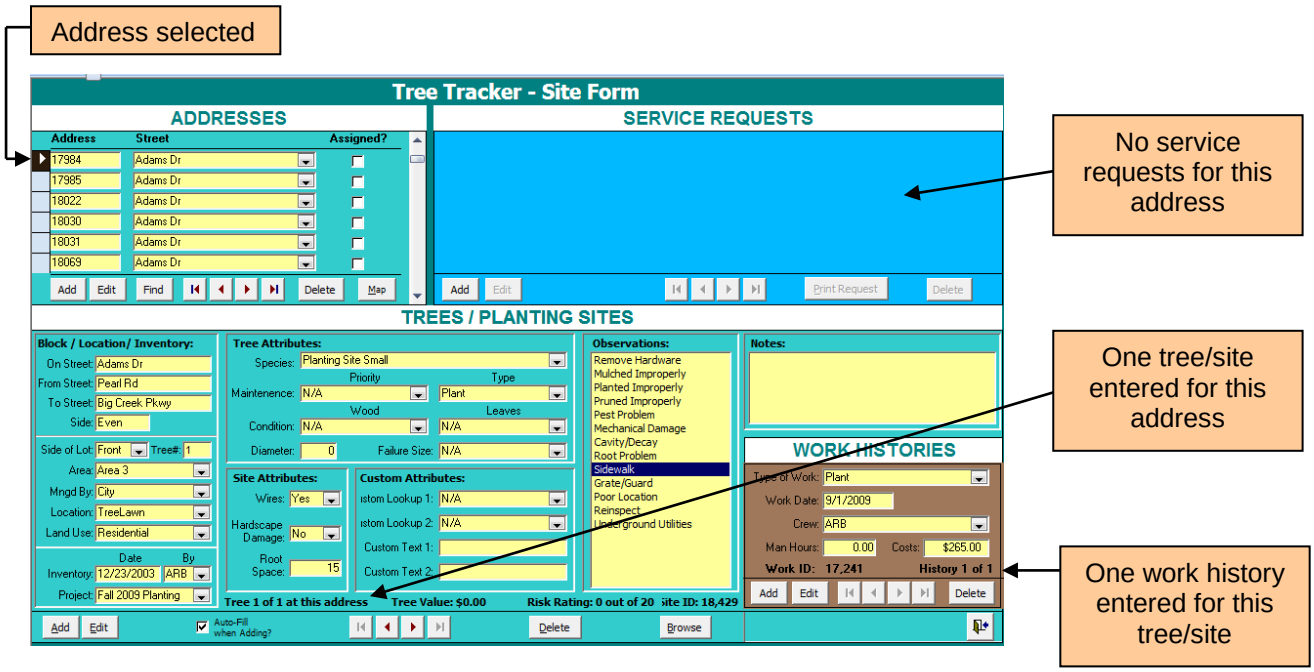
- Quickly view the detailed information about a work history including the work done, the date the work was done, the crew, the man hours and the costs
- Add, edit, or delete work histories
- Navigate between work histories if there are multiple work histories for a specific tree/site

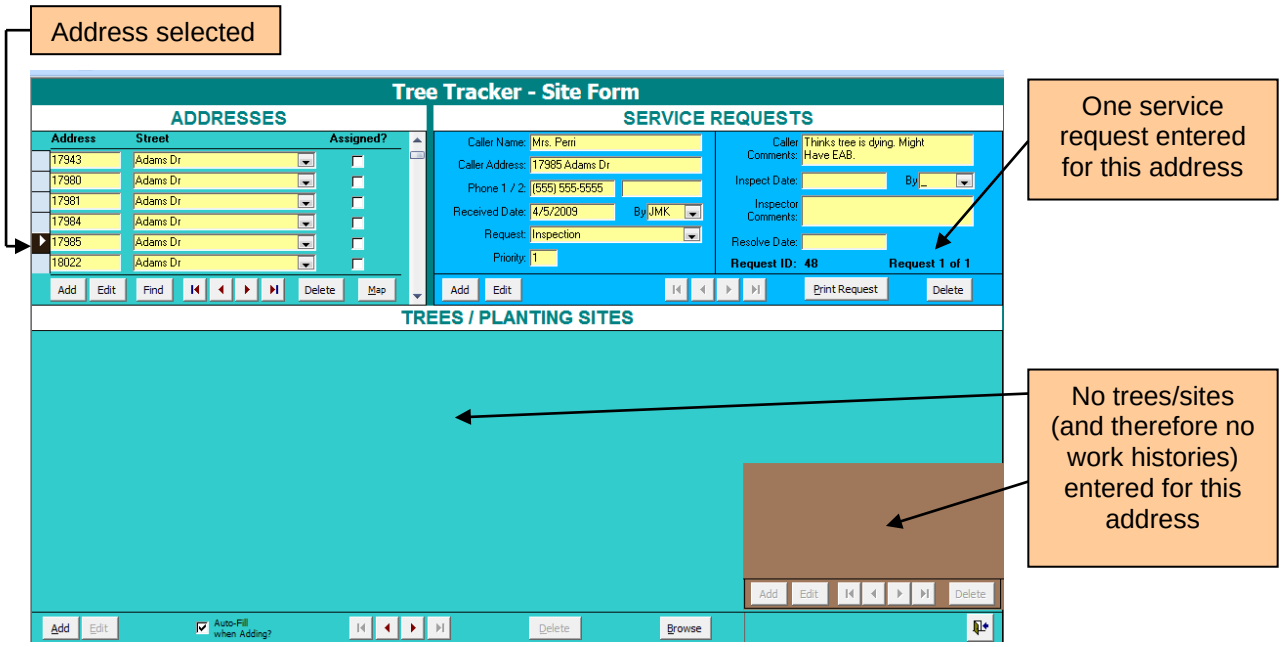
You may be starting to get the idea of how the sections of the Site Form work together, but here's more to help you:

4.3 How the Four Sections of the Site Form Are Organized

Remember that on the Site Form, **everything starts with choosing a specific address in the Addresses section**. Once you have chosen a specific address, service requests and trees/sites associated with that address appear in their respective sections.

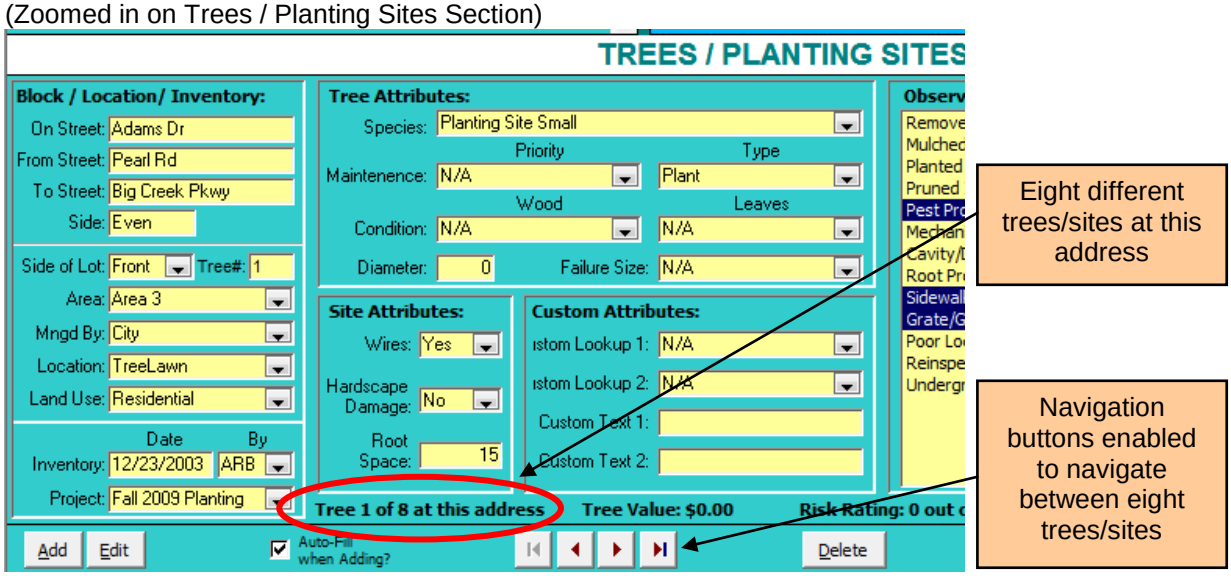
If there are no service requests or trees/sites associated with that address, that section will be blank, and will look like these two examples:





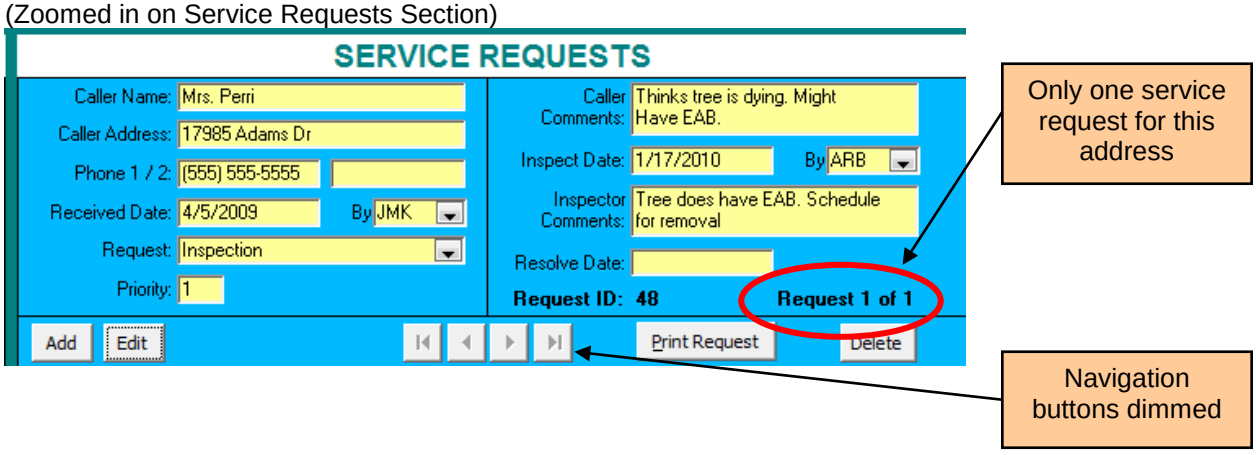
Because there can be multiple service requests and trees/sites associated with a specific address, you can use the |◄, ◄, ► and ►| buttons in the Service Requests section to navigate between multiple service requests and the Trees / Planting Sites section to navigate between multiple trees/sites.

(Zoomed in on Trees / Planting Sites Section)



If there are not multiple service requests or trees/sites for an address, the |◄, ◄, ► and ►| buttons will be dimmed out, and will look like this:

(Zoomed in on Service Requests Section)

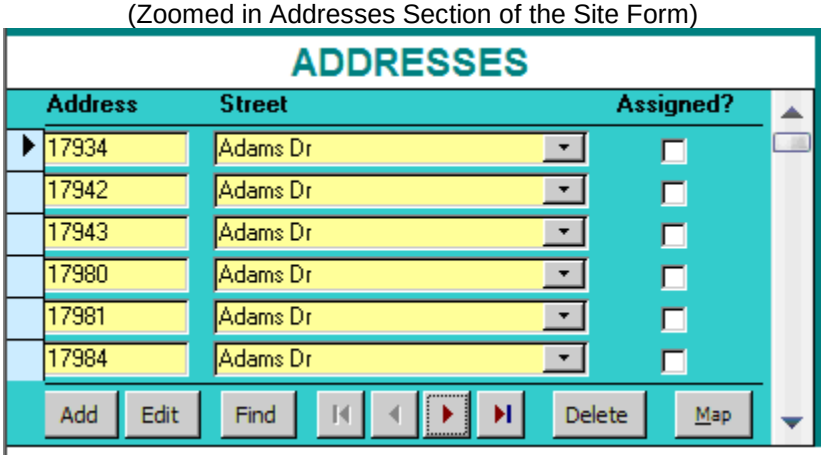


So to review briefly, when you select an address in the Addresses section, you will be able to see all of the service requests and trees/sites for that address. For a specific address, there may be multiple service requests and trees/sites, there may be only one service request or tree/site, or there may be none. If there are multiple service requests or trees/sites, use the navigation buttons (|◄, ◄, ► and ►|) to move between each record.

4.4 The Addresses Section of the Site Form in Detail

Let's take a look at the Addresses section of the Site Form in depth and see what's required for each field.

(Zoomed in Addresses Section of the Site Form)



TO SEE A DEFINITION OF EACH FIELD OF THE ADDRESSES SECTION, GO TO SECTION 8.1: ADDRESSES SECTION FIELD DEFINITIONS IN THE APPENDIX

This is the section you will use first in order to navigate through the Site Form and get access to the information you seek. Since all of the other sections are tied to a specific address, you must use the Addresses section first to find that address. It is normal to have hundreds, if not thousands, of addresses in your database.

NOTE

Remember that you cannot add a tree/site or a service request without having the address chosen first. That's why you need to find the address before you can do anything else!

As you look at the Addresses section, you will notice that the addresses are sorted alphabetically by street first, then by street number.

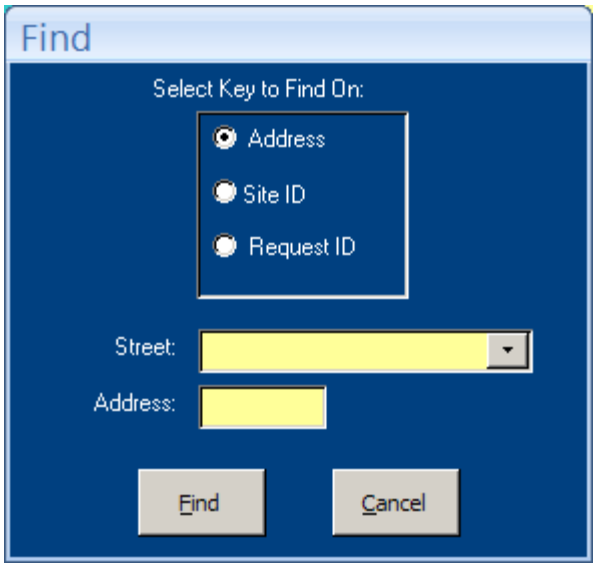
4.4a Finding an Address

There are several ways to find an address:

1. You can scroll up and down the Address List to find an address
2. You can use the navigation buttons:
   - |◀ takes you to the first address in the database
   - ◀ takes you to the previous address in the database
   - ▶ takes you to the next address in the database
   - ▶| takes you to the last address in the database
3. If there are a large number of addresses in the database (which is likely), use the "Find" button to get you to the proper address faster.

4.4b Using the "Find" Button

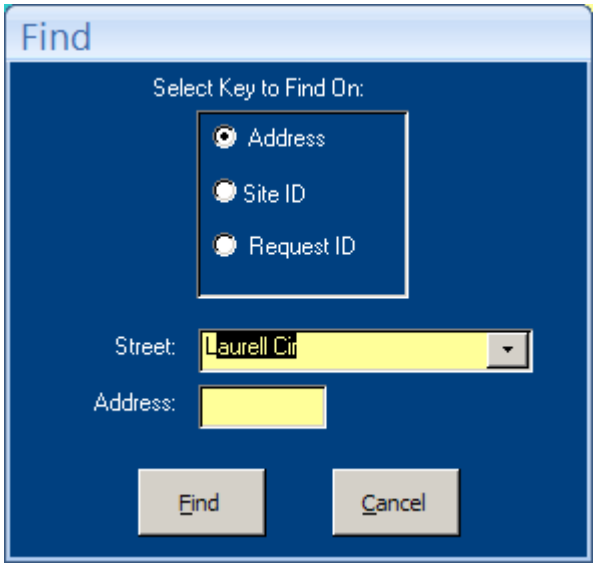
When you click "Find", you will see this window:



To begin to search for the address you are seeking, you must decide how you want to search for it.

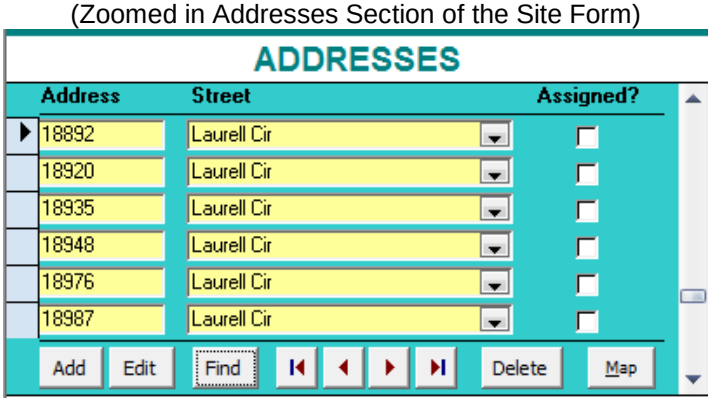
- By default, the find address feature searches by street name and address. Normally, you will search by address.
- If you happen to know the Site ID (generated by Tree Tracker when a new tree/site is entered), or the Request ID (generated by Tree Tracker when a new service request is entered), you can select either option and search by the Site ID or Request ID number.

As you type the first letters of the street you are looking for, the names of streets matching those letters will appear in the field until the street you are seeking appears. By typing the letter L, Laurell Cir. appears in the example on the next page because it is the first street alphabetically in the L's.



If you do not wish to enter the address number, and you click “Find” now, it will return you to the Address List with your street selected at the lowest-numbered address on that street (see below).

(Zoomed in Addresses Section of the Site Form)



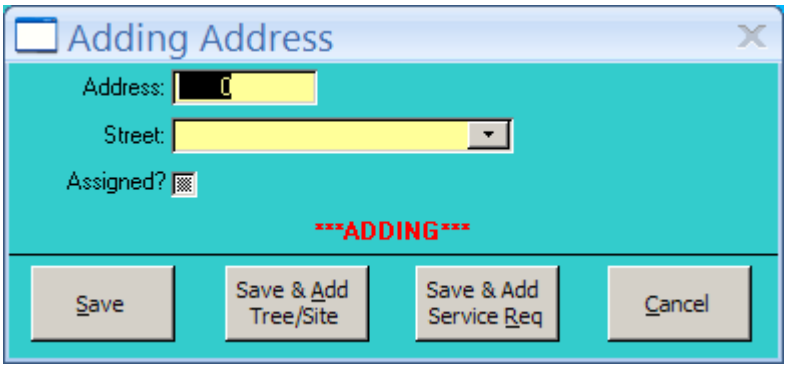
Normally, you will enter both the street name and address in the Find window to narrow your search to the specific address.

4.4c Adding an Address

NOTE

Be sure to check to see if your address exists first before going ahead and adding it!

When you click "Add" in the Addresses section of the Site Form, you will be able to add an address number to the database. This window will appear:



- You will need to type in the new address number, and select the proper street from the Street drop-down box.

- In locations where the address number is either not posted or not available, check the Assigned box to indicate that the address has been assigned. These assigned addresses can be determined by using opposite or parallel addresses that can be found in the field.

Once you have entered the appropriate information, you can click "Save" and return to the Site Form, you can click "Save and Add Tree/Site", which will bring up the Add Tree window (go to section 4.6d: Adding a New Tree/Site to learn more), or you can click “Save & Add Service Req", which will bring up the Add Service Request window (go to section 4.5c: Adding a New Service Request to learn more).

IMPORTANT NOTE

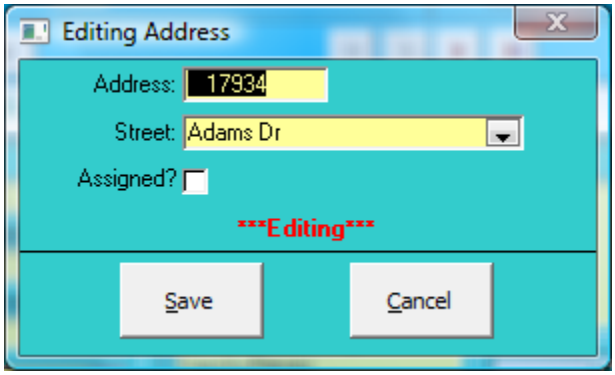
You CANNOT add or edit a street name from the Addresses section of the Site Form!

The master list of street names is maintained in the Streets Lookup Table. You must go to the main menu, select "Lookup Tables", and then select "Streets". It is from this lookup table that you can add, edit or delete street names.

Go to section 5.3a: Streets Lookup Table or section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more.

4.4d Editing an Address

When you need to edit an address, click "Edit" and this window will appear.



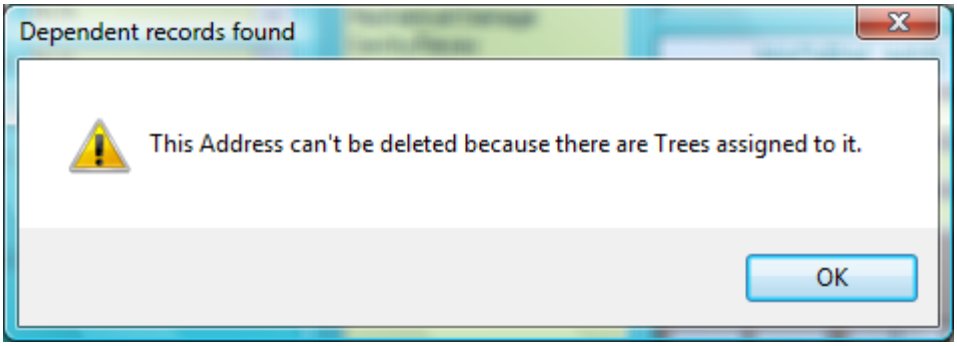
From this window, you can change the address number, choose a different street from the Master Street List and assign (or unassign) the address.

IMPORTANT NOTE	BE CAREFUL! Once you edit an address, all of the trees/sites and service requests linked to that address will be linked to the new address. You should only be editing street addresses if there is an error in the street number or if you are changing the address to or from assigned. Be sure that this is what you want to do!

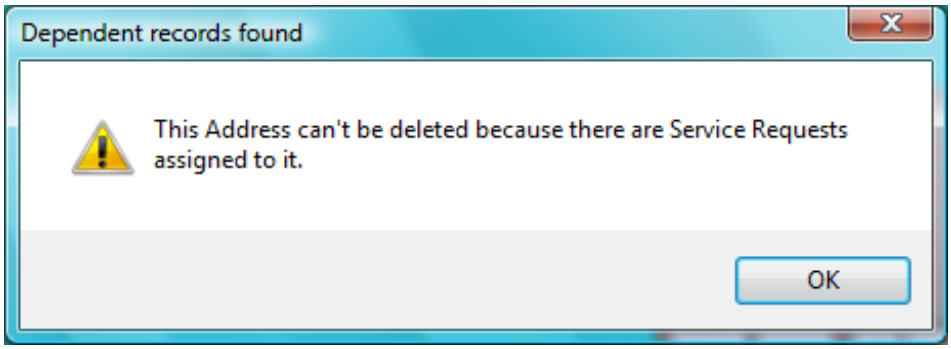
4.4e Deleting an Address

You can delete an address if necessary (although it is rare), perhaps because it was entered in error, for example. Remember that you can only delete and address if there are no trees/sites or service requests assigned to it.

If you try to delete an address and there are trees/sites assigned to it, you will get this error message:



If you try to delete an address and there are service requests assigned to it, you will get this error message:



4.4f Mapping an Address[1]

Tree Tracker allows you to use Google Maps® and its features to view an address[2].

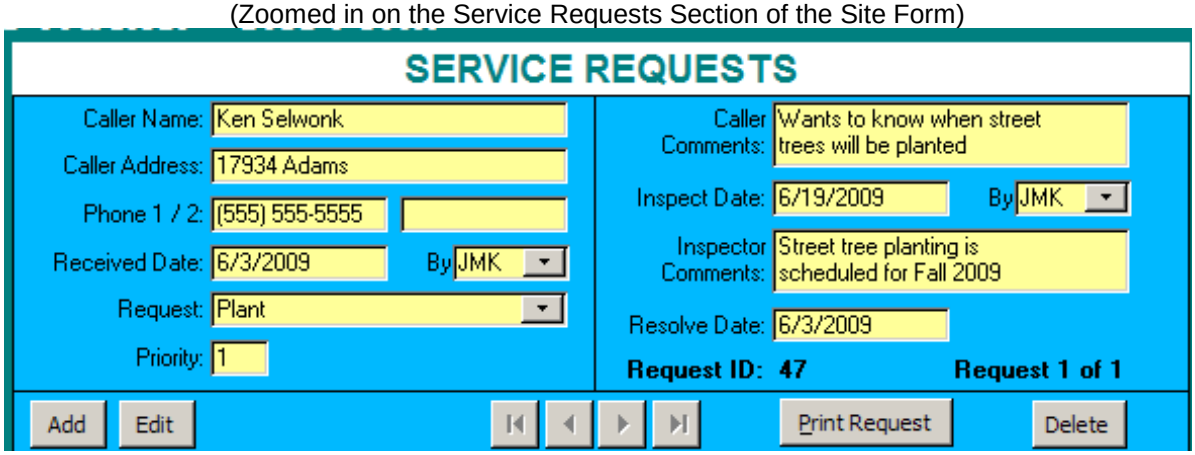
Once you have selected an address, click on the "Map" button. This will launch Google Maps®, and your selected address will appear. Using Google Maps®, you can:

- View the address on a map
- View the address from satellite view
- View the address in StreetView® if it is available for your area
- Print a map with the address pinpointed
- Generate directions to or from the address

4.5 The Service Requests Section of the Site Form in Detail

Let's take a look at the Service Requests section of the Site Form in depth and see what's required for each field.

(Zoomed in on the Service Requests Section of the Site Form)



[1] This feature requires an intenet connection.
[2] This feature is subject to the accuracy of Google Maps®.

TO SEE A DEFINITION OF EACH FIELD OF THE SERVICE REQUESTS SECTION, GO TO [SECTION 8.2: SERVICE REQUESTS SECTION FIELD DEFINITIONS](#) IN THE APPENDIX

You use the Service Requests section of the Site Form to administer service requests for a specific address. In this section, you can view all service requests associated with an address, add new service requests, edit previously entered service requests, print a copy of a service request, track the status of a service request, or delete a service request.

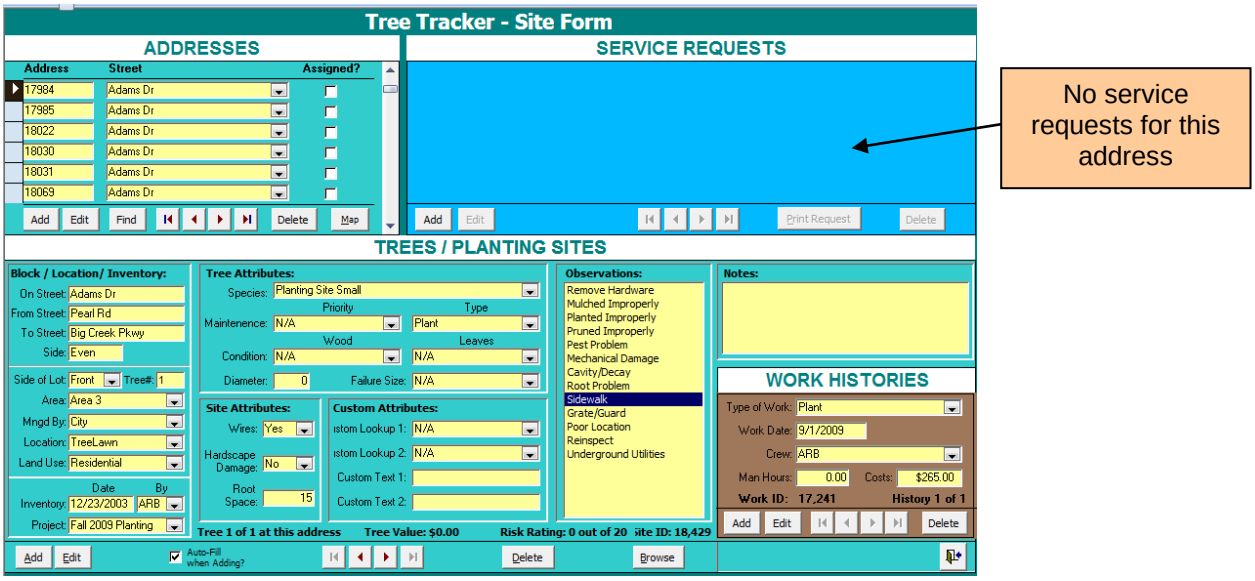
NOTE

The Service Requests section is designed to handle the initial request for work to be done, and the follow up inspection. This information is used so that work crews can then perform the work.

Although the Service Requests section generates work orders for work to be performed, it does not track the actual work completed, man hours, costs, etc. That is tracked in the Work Histories section (go to [section 4.7: The Work Histories Section of the Site Form](#) to learn more).

4.5a Viewing Existing Service Requests

When you choose an address in the Addresses section, any associated service requests for that address will appear in the Service Requests section. If there are no associated service requests, the screen will look like this:

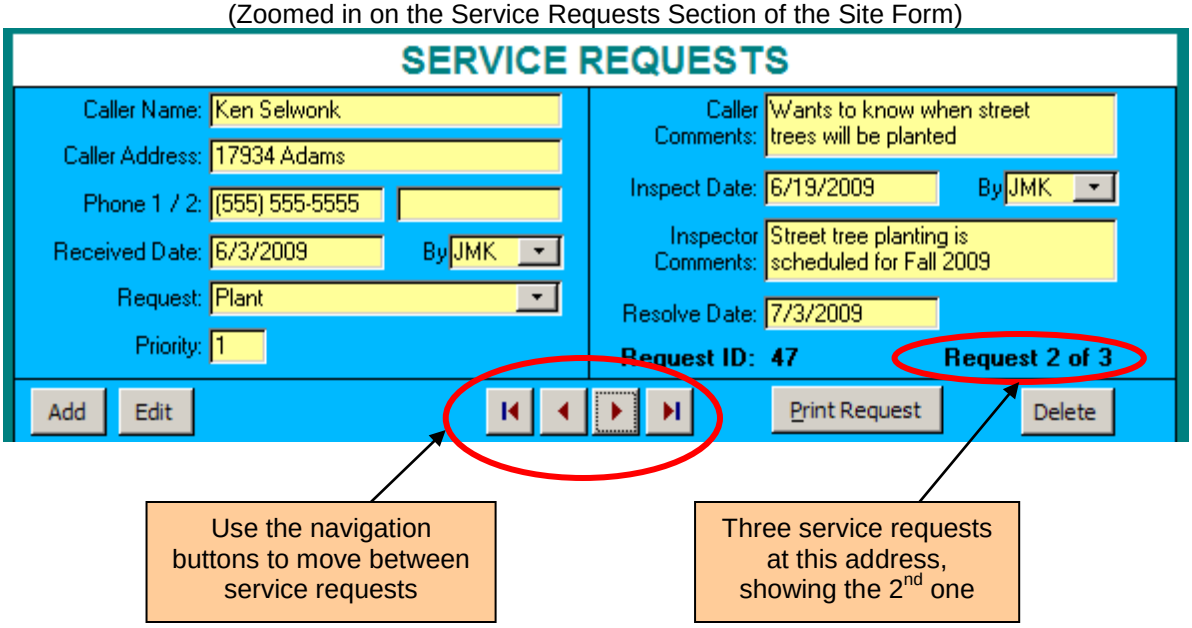


Your only option in this case is to add a new service request for this address.

4.5b Viewing More Than One Service Request

It is entirely possible that there is more than one service request at a given address. If this is the case, you can use the navigation buttons to move between service requests. You can tell how many service requests there are for an address by looking in the lower right-hand corner of the Service Requests section where it will show “Request # of #". Tree Tracker displays the most recent service request first.

(Zoomed in on the Service Requests Section of the Site Form)



Use the navigation buttons to move between service requests

Three service requests at this address, showing the 2nd one

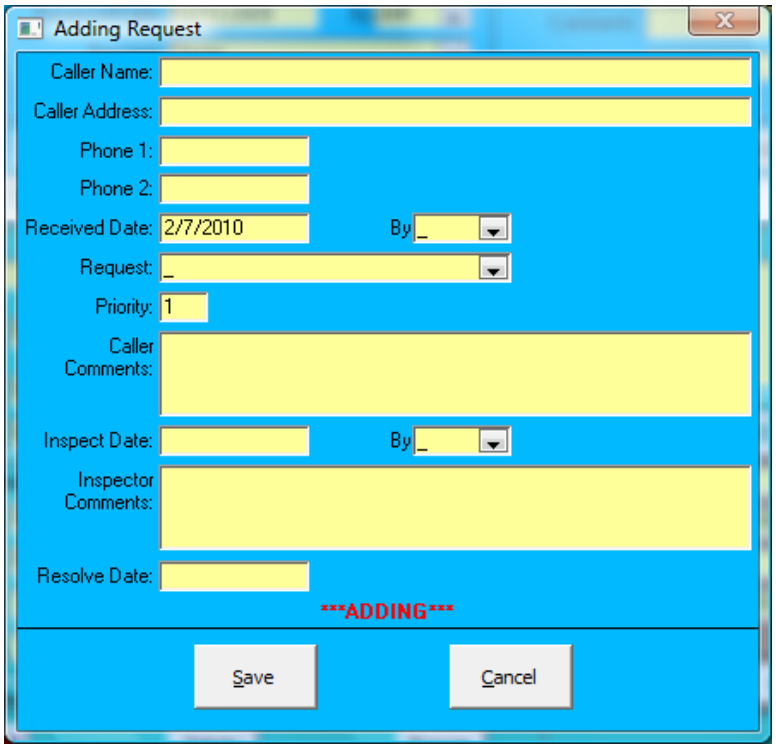
When you use the navigation buttons:

- |◄ takes you to the first service request at the address
- ◄ takes you to the previous service request at the address
- ► takes you to the next service request at the address
- ►| takes you to the last service request at the address

4.5c Adding a New Service Request

IMPORTANT NOTE	BE SURE YOU HAVE CHOSEN THE CORRECT ADDRESS IN THE ADDRESSES SECTION BEFORE ADDING A NEW SERVICE REQUEST! If you don't have the right address, it's going to be tough to find the service request again.

When you click on the "Add" button in the Service Requests section, this window will appear:

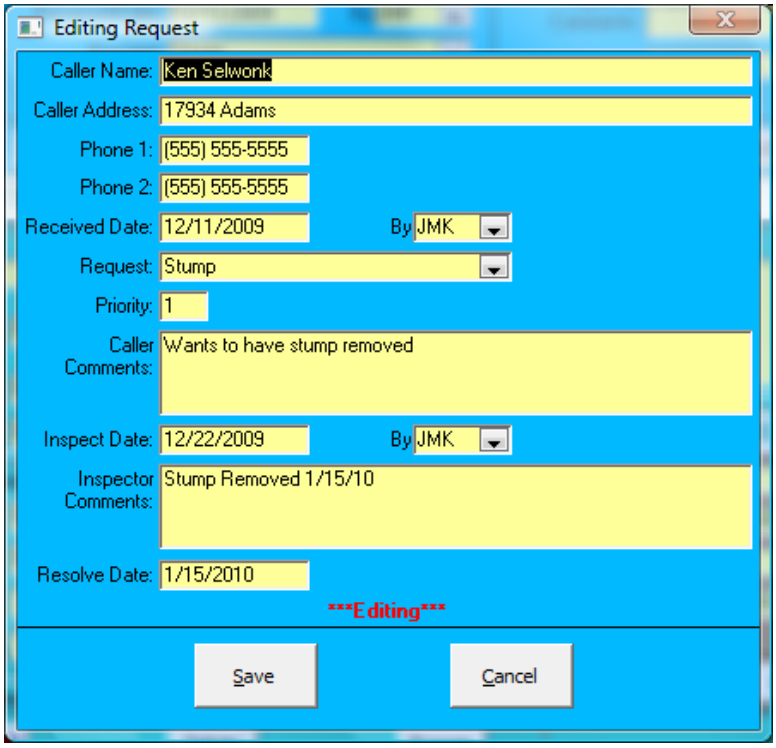


TO SEE A DEFINITION OF EACH FIELD OF THE SERVICE REQUESTS SECTION, GO TO SECTION 8.2: SERVICE REQUESTS SECTION FIELD DEFINITIONS IN THE APPENDIX

When you are finished adding information, click "Save" or click "Cancel" to abandon adding a service request.

4.5d Editing (or Adding Information to) an Existing Service Request

When you click on the "Edit" button in the Service Requests section, this window will appear:



NOTE

Shortcut

You can also bring up the same editing request window by double-clicking anywhere on the current service request in the Service Requests section.

In this window, all of the existing service request's information appears, and you are able to make changes to any of these fields. If you are unsure of what to put in any of these fields, each field has been described in detail in Appendix 1.

Most often, you will be using the edit function to add additional information to the service request, such as entering the inspection and resolve dates as the service request is completed, or adding additional comments.

When you are finished editing information, click "Save" or click "Cancel" to abandon editing a service request.

4.5e Printing Service Requests

Depending on what information has been entered into a service request, Tree Tracker will print one of two different service request orders, either the Service Request Inspection Order or the Service Request Work Order.

Tree Tracker assumes that once a caller requests work to be performed, a staff member will perform an inspection of the site before work is initiated by a work crew. In the Service Requests section of the Site Form, all of the information from the caller will have been entered, but no inspection or resolve date will have been entered because there has been no inspection or resolution yet.

By clicking on the "Print Request" button at this point (with no inspection date or resolve date entered), a Service Request Inspection Order will be printed. Here's a sample of what it will look like:

Service Request Inspection Order

Tree Tracker

Request Details

Address: 17934 Adams Dr | Received On: 05/29/09 | Priority: 1 | Request ID: 53

Request Type: Remove | Received By: ARB

Caller Details

Caller Name: Ken Selwonk | Caller Address: 17934 Adams | Phone 1: (555) 555-5555 | Phone 2: (555) 555-5555

Caller Comments: Would like dying tree removed

Inspection Details

Inspection Date: {__/__/__} | By: {_____}

Inspector Comments:

Other Requests at this Address

Caller	Caller Address	Phone 1	Phone 2	Req. Type	Pri	Date Rcv'd	By	Date Inspected	By	Date Resolved	Request ID
Ken Selwonk	17934 Adams	(555) 555-5555	(555) 555-5555	Stump	1	12/11/09	JMK	12/22/09	JMK	01/15/10	54
Ken Selwonk	17934 Adams	(555) 555-5555		Plant	1	06/03/09	JMK	06/19/09	JMK	07/03/09	47

Trees and Sites at this Address

Sd/#	Location	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Failure Size	Wires	Hdscp Dmg.	Site ID	Type of Work	Date of Work	Crew Leader	Man Hours	Costs
F1	TreeLawn	Apple, Common	Young-Train	Good-Good	3	00 to 03	Yes	No	18,426	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F2	TreeLawn	Apple, Common	Young-Train	Good-Good	2	N/A	Yes	No	34,326	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F4	TreeLawn	Oak, Pin	Routine-Thin	Fair-Fair	26	04 to 12	Yes	Yes	34,328	{_____}	{__/__/__}	{____}	{____}	{___}
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F5	TreeLawn	Pine, Norfolk Island	Routine-Train	Good-N/A	9	04 to 12	Yes	No	34,329	{_____}	{__/__/__}	{____}	{____}	{___}
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														

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The Service Request Inspection Order prints all of the necessary information from the service request so that the staff member can go to the site and perform an inspection. The Inspection Order also includes additional information, such as previous service requests and details of all trees/sites listed for that address.

Notice that the Inspection Details section is blank. This is where the inspector can write notes to be entered into the “Field Comments” field later.

NOTE

Depending on the situation, it is not necessary to enter the inspection date and comments into Tree Tracker prior to the work order being performed.

If there is a short time frame between the inspection and the work order being completed, the Service Request Inspection Order can be handed directly to the crew for completion without the intermediate step of entering the inspection information into Tree Tracker and then printing a service request work order.

However, once the request has been completed, the inspection information should still be entered along with the resolve date and corresponding work history (if needed).

Once the inspection date and field comments have been entered, if you click "Print Request" now, a Service Request Work Order will be generated. Here's a sample of what it will look like:

Service Request Work Order

Tree Tracker

Request Details

Address: 17934 Adams Dr | Received On: 06/03/09 | Priority: 1 | Request ID: 47

Request Type: Plant | Received By: JMK

Caller Details

Caller Name: Ken Selwonk | Caller Address: 17934 Adams | Phone 1: (555) 555-5555 | Phone 2:

Caller Comments: Wants to know when street trees will be planted

Inspection Details

Inspection Date: 06/19/09 | By: JMK

Inspector Comments: Street tree planting is scheduled for Fall 2009

Other Requests at this Address

Caller	Caller Address	Phone 1	Phone 2	Req. Type	Pri	Date Rcv'd	By	Date Inspected	By	Date Resolved	Request ID
Ken Selwonk	17934 Adams	(555) 555-5555	(555) 555-5555	Stump	1	12/11/09	JMK	12/22/09	JMK	01/15/10	54
Ken Selwonk	17934 Adams	(555) 555-5555	(555) 555-5555	Remove	1	05/29/09	ARB		_		53

Trees and Sites at this Address

Sd/#	Location	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Failure Size	Wires	Hdscp Dmg.	Site ID	Type of Work	Date of Work	Crew Leader	Man Hours	Costs
F1	TreeLawn	Apple, Common	Young-Train	Good-Good	3	00 to 03	Yes	No	18,426	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F2	TreeLawn	Apple, Common	Young-Train	Good-Good	2	N/A	Yes	No	34,326	{_____}	{__/__/__}	{____}	{____}	{___}
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F4	TreeLawn	Oak, Pin	Routine-Thin	Fair-Fair	26	04 to 12	Yes	Yes	34,328	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F5	TreeLawn	Pine, Norfolk Island	Routine-Train	Good-N/A	9	04 to 12	Yes	No	34,329	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F6	TreeLawn	Planting Site Small	N/A-Plant	N/A-N/A	0	N/A	Yes	No	34,330	{_____}	{__/__/__}	{____}	{____}	{___}
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														

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The Service Request Work Order is identical to the Service Request Inspection Order, except that the Inspection Details section is now filled in.

The Service Request Work Order is designed to be given to a work crew with the initial request information, the inspection details and additional information about that address included so that they can perform the work.

Note that in the section of the Service Request Work Order titled “Trees and Sites at this Address", there are columns for type of work, date of work, crew leader, man hours and costs. The work crew should fill in the information about the work they did in the row of the specific tree/site they worked on. Make sure that the crew is filling in the information on the proper tree so that when that information is entered in as a work history, it is associated with the correct tree/site (go to section 4.7: The Work Histories Section of the Site Form to learn more).

NOTE

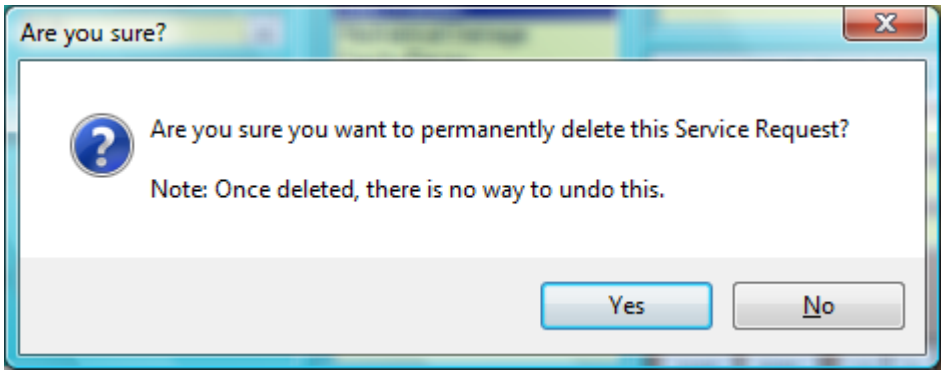
When you click "Print Request" in the Service Requests section of the Site Form, a print preview window will appear.

If the edges of the Service Request Order seem to be cut off in the print preview, adjust the margins setting. Go to Page Setup settings and try changing the left and right margins to 0.5 inches. This should resolve this issue.

4.5f Deleting a Service Request

You can delete a service request (although it is rare), perhaps because it was entered in error under the wrong address, for example. Make sure that this is what you want to do. If in doubt, DON'T DELETE!

When you click the "Delete" button, this message will appear:



Again, make sure that you really want to delete the service request. If so, click "Yes" and it will be removed.

4.5g What is the Request ID?

You've probably noticed the request ID in the Service Requests section and wondered what it is and why it's there.

Each time a new service request is generated, Tree Tracker creates a unique Request ID number for it. That unique ID appears on reports and service request printouts.

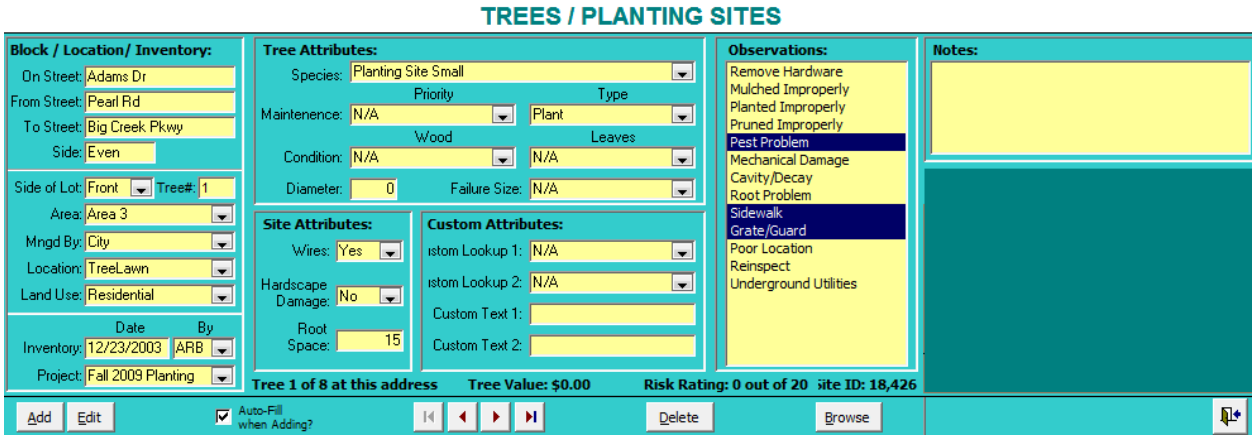
Let's say you are looking at a report or service request printout, and you want to view or edit a service request and you know its Request ID number. It's a whole lot faster to search for the service request by its Request ID than by searching for the correct address, then the correct service request at that address.

Remember that in the Addresses section, the "Find" button has an option to search by Request ID (go to section 4.4b: Using the "Find" Button for more information on the Find feature in the Addresses Section). By knowing the Request ID and searching by it, you will get to the right service request faster!

4.6 The Trees / Planting Sites Section of the Site Form in Detail

Let's take a look at the Trees / Planting Sites section of the Site Form in depth and see what's required for each field.

(Zoomed in on the Trees/Sites Section of the Site Form)



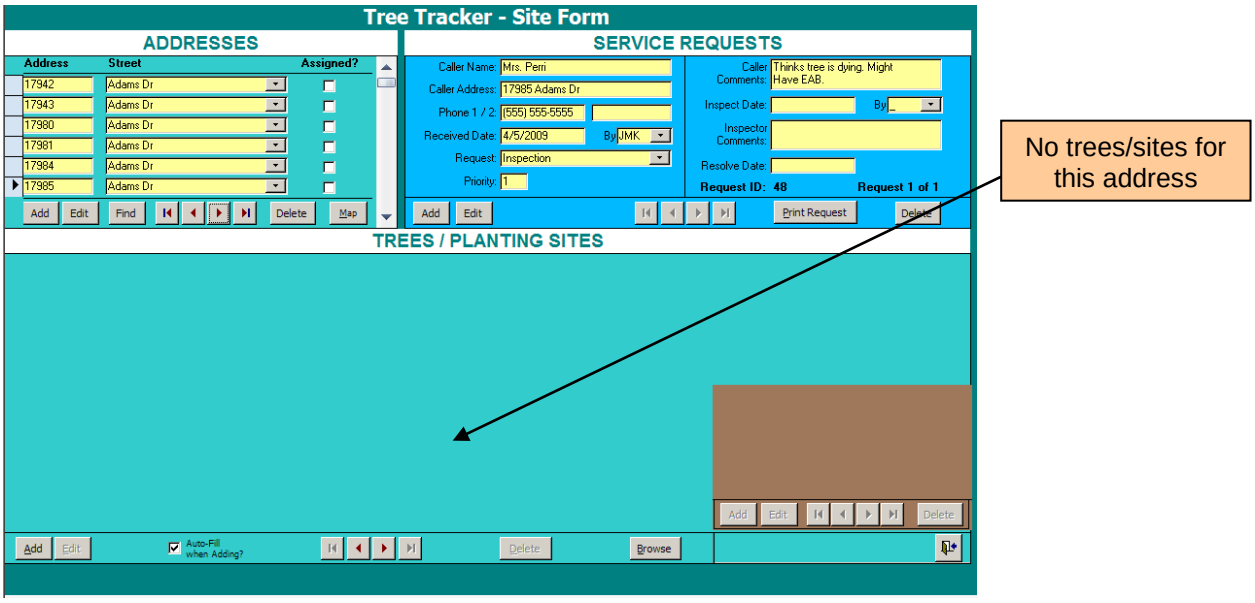
TO SEE A DEFINITION OF EACH FIELD OF THE TREES / PLANTING SITES SECTION, GO TO SECTION 8.3: TREES / PLANTING SITES SECTION FIELD DEFINITIONS IN THE APPENDIX

The Trees / Planting Sites section (also referred to as the Trees/Sites section) of the Site Form is where you manage detailed information about each tree/site for a specific address. When an address is selected in the Addresses section, any related tree/site records for that address (there can be multiple tree/site records for a specific address) will appear.

In this section, you can quickly view the detailed information about a specific tree/site, add, edit or delete trees/sites, navigate between trees/sites if there are multiple trees/sites for a specific address and browse all of the trees/sites in an area.

4.6a Viewing Existing Trees/Sites

When you choose an address in the Addresses section, any trees/sites for that address will appear in the Trees/Sites section. If there are no associated trees/sites, the screen will look like this:

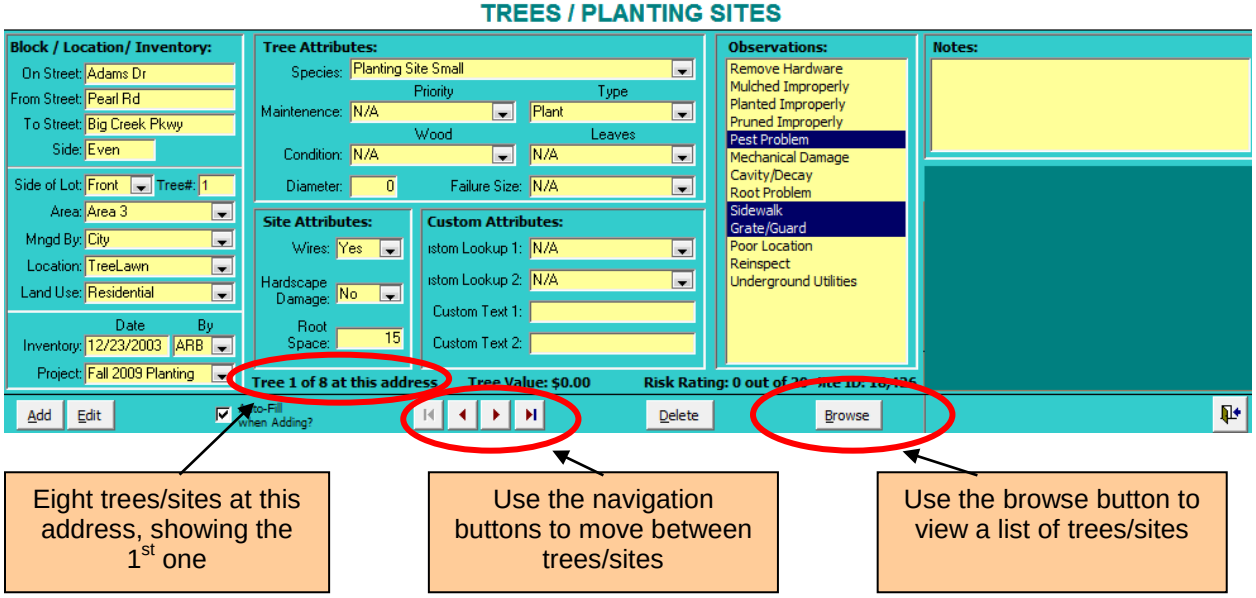


Your only option in this case is to add a new tree/site for this address.

4.6b Viewing More Than One Tree/Site

It is likely that there is more than one tree/site at a given address. If this is the case, you can use the navigation buttons to move between trees/sites. You can tell how many trees/sites there are for an address by looking in the lower center section of the Trees/Sites section where it will show “Tree # of # at this address".

(Zoomed in on the Trees/Sites Section of the Site Form)



When you use the navigation buttons:

- **|◄** takes you to the first tree/site **at your current address**

- ◄ takes you to the previous tree/site
  - When using the ◄ button in the Trees/Sites section, you can move between addresses. If you are at the first tree/site of an address and click ◄, it will take you to the last tree/site of the previous address.
  - The ability to move between addresses is a convenience feature of Tree Tracker so that you don't have to go to the Addresses section and change the address just to see trees/sites that are nearby your current address.

- ► takes you to the next tree/site
  - When using the ► button in the Trees/Sites section, you can move between addresses. If you are at the last tree/site of an address and click ►, it will take you to the first tree/site of the next address.
  - The ability to move between addresses is a convenience feature of Tree Tracker so that you don't have to go to the Addresses section and change the address just to see trees/sites that are nearby your current address.

- **►|** takes you to the last tree/site **at your current address**

4.6c Browsing Trees/Sites in the Area

Tree Tracker allows you to view a list of all of the trees/sites in the database in address order to browse through and quickly see information about each tree/site in the area. When you click on the "Browse" button at the bottom right of the Trees/Sites section, this window will appear:

Tree Browse

Address	Side/ Tree#	Re-moved	Area	Location	Species	Maintenance Priority / Type	Condition Wood/Leaves	DBH	Failure Size	Wires	Hdscp Damg.	Root Space	Tree ID	Managed By	Land Use
17934 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,426	City	Residential
17934 Adams Dr	F2	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	34,326	City	Residential
17934 Adams Dr	F3	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	34,327	City	Residential
17934 Adams Dr	F4	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	34,328	City	Residential
17934 Adams Dr	F5	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	34,329	City	Residential
17934 Adams Dr	F6	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	34,330	City	Residential
17934 Adams Dr	F7	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	34,331	City	Residential
17934 Adams Dr	F8	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	34,332	City	Residential
17942 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,427	City	Residential
17943 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,420	City	Residential
17980 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,428	City	Residential
17981 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,419	City	Residential
17984 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,429	City	Residential
17985 Adams Dr	F1	☐	Area 3	TreeLawn	Ash, White	Routine - Thin	Fair - Fair	12	00 to 03	No	Yes	15	18,418	City	Residential
18022 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,430	City	Residential
18030 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,431	City	Residential
18031 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,416	City	Residential
18031 Adams Dr	F2	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,417	City	Residential
18069 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,415	City	Residential
18072 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,432	City	Residential
18073 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,414	City	Residential
18112 Adams Dr	F1	☐	Area 3	TreeLawn	Maple, Red	Immediate - Clean	Good - Good	12	04 to 12	Yes	Yes	15	18,433	City	Residential
18115 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,413	City	Residential
18119 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,412	City	Residential
18158 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,434	City	Residential
18159 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,411	City	Residential
18162 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,435	City	Residential
18200 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,436	City	Residential
18201 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,410	City	Residential
18205 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,409	City	Residential
18208 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,437	City	Residential
18247 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	No	No	15	18,408	City	Residential
18250 Adams Dr	F1	☐	Area 3	TreeLawn	Planting Site Small	N/A - Plant	N/A - N/A	0	N/A	Yes	No	15	18,438	City	Residential

Select Cancel

The list is sorted first by address, then by side of lot, then by unique tree number at that address. Most of the fields that are in the Trees/Sites section can also be viewed in this browse window.

The list will appear with the tree/site you were viewing on the Site Form at the top of the screen. You can then use the scroll bar or navigation buttons to see trees/sites before or after the currently selected tree.

Once you have found the tree you want to view on the Site Form, click anywhere on that tree's row of information. You'll see that a black arrow appears to the left of that row. Click "Select" and you will return to the Site Form with the selected tree displayed. As a shortcut,

you can double-click on any address to jump directly back to the Site Form with that tree/site displayed.

If you look at the side / tree# column, you'll notice that is says F1 or S2. The letter refers to the first letter of the side of lot. In this case, F is for front of lot and S is for side of lot. The tree# is the unique number assigned to that tree/site. So F1 is tree number one at the front of lot, and S2 is tree number two at the side of lot. R6 would refer to the sixth tree at the rear of lot, and M1 would refer to tree number one on a median. For more information on assigning tree numbers, go to section 4.6f: A Note on Assigning Tree Numbers.

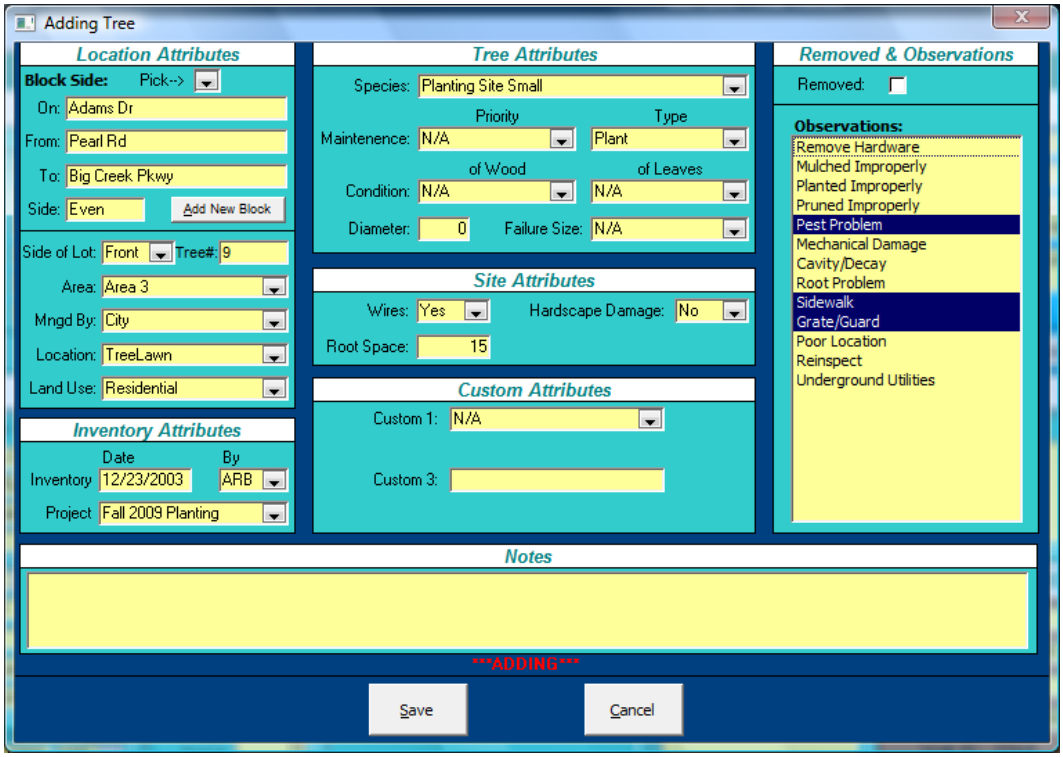
The advantage to the browse window is that you get to see a snapshot of all of the trees in the immediate area at once instead of having to use the navigation buttons on the Site Form to scroll through each tree/site one-by-one.

4.6d Adding a New Tree/Site

IMPORTANT NOTE	BE SURE YOU HAVE CHOSEN THE CORRECT ADDRESS IN THE ADDRESSES SECTION BEFORE ADDING A NEW TREE/SITE! If you don't have the right address, it's going to be tough to find the tree/site again.

Depending on whether you have checked the "Auto-Fill When Adding" check box, one of two Adding Tree windows will appear (you can also turn on/off the Auto-Fill When Adding feature from the systems options menu. Go to section 7.5b: Site Form Defaults to learn more).

If you have the Auto-Fill When Adding feature turned on, this window will appear:



TO SEE A DEFINITION OF EACH FIELD OF THE TREES / PLANTING SITES SECTION, GO TO SECTION 8.3: TREES / PLANTING SITES SECTION FIELD DEFINITIONS IN THE APPENDIX

Because the Auto-Fill When Adding feature is turned on, all of the data from the ***currently viewed tree/site*** will be filled in with the next tree number already entered.

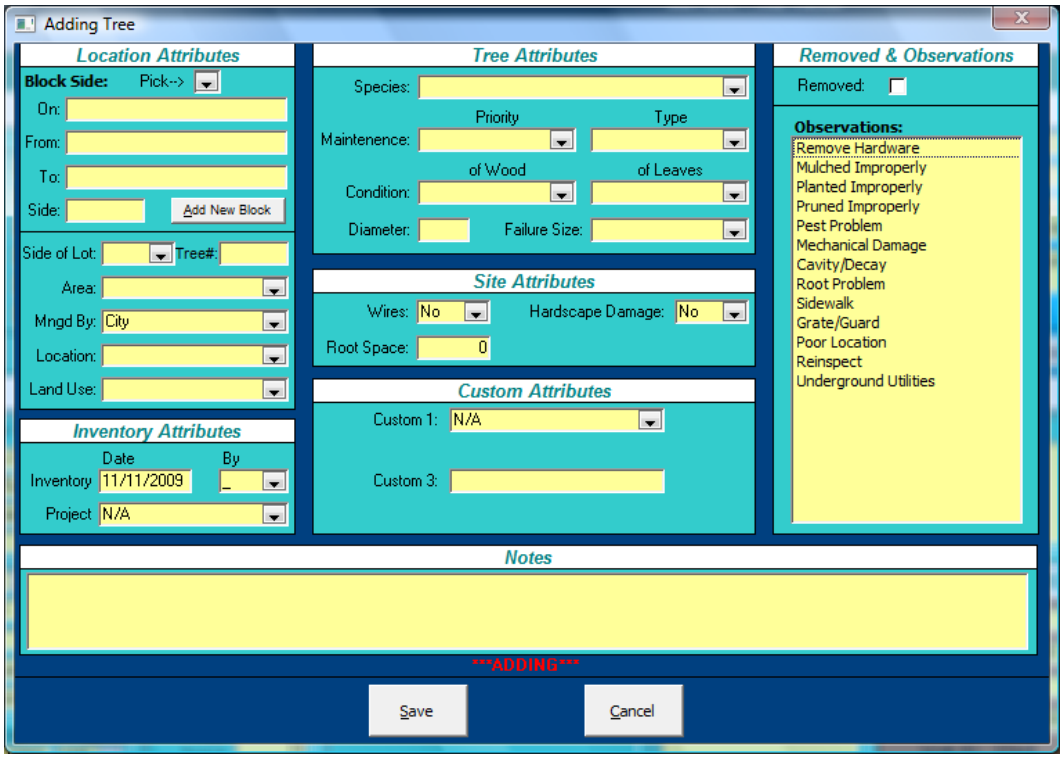
- If you are viewing a removed tree, and then click "Add", Tree Tracker will use the tree number of the removed tree rather than using a new number.

This is convenient because you do not have to re-enter the address, block side, inventory information, etc. You just need to change the fields that are different about the new tree/site that you are adding.

Perhaps your new tree/site is on a different side of lot or a different location. If you change the side of lot, the tree number will change too. Tree attributes, site attributes, custom attributes and observations will likely be different and need to be changed.

The advantage of the auto-fill feature is that you do not need to enter *every* field *every* time when entering an inventory of a site.

If you *do not* have the Auto-Fill When Adding feature turned on, this window will appear:

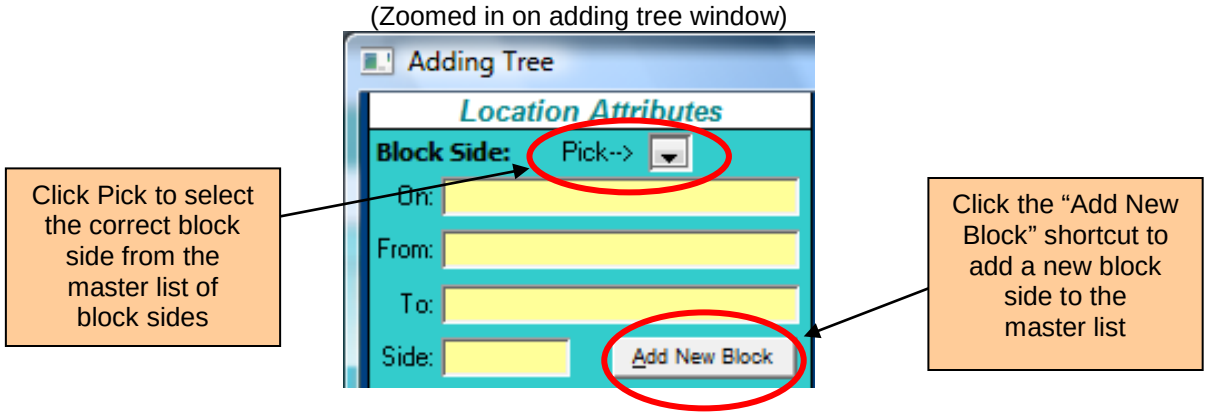


Because Auto-Fill is not on, all of the fields will need to be entered. A few fields come with default settings that can be changed, and the current date will appear in the Inventory field.

4.6e A Note on Choosing and Adding Block Sides

When choosing a block side, you do not enter the On, From, To and Side information directly into their fields. Instead, you have to click on "Pick" and select the correct block side from the master list of block sides. That block side information will then appear in the On, From, To and Side fields. Go to section 5.3b: Block Sides Lookup Table to learn more about this lookup table. Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in the Block Sides Lookup Table.

(Zoomed in on adding tree window)



Tree Tracker also provides a shortcut in the Adding Tree window so that you can quickly add a new block side rather than having to leave the Site Form, go to the Block Sides lookup table and add a new block side there.

When you are finished adding information, click "Save" or click "Cancel" to abandon adding a tree/site.

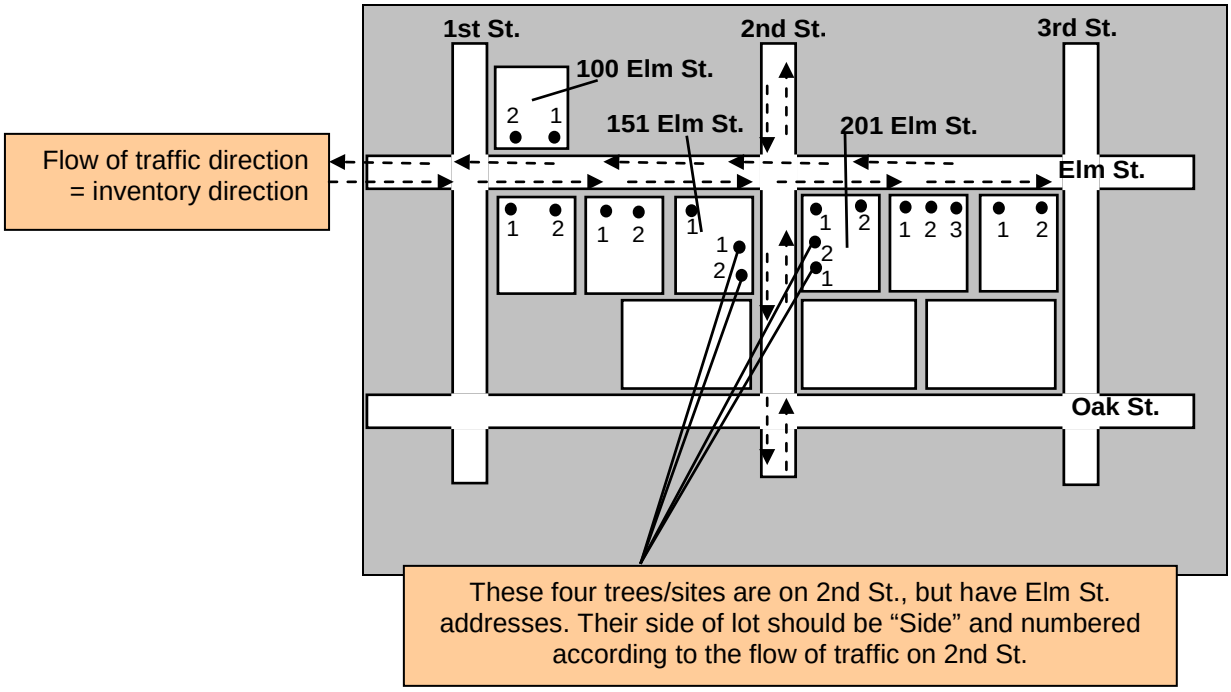
4.6f A Note on Assigning Tree Numbers

Individual trees/sites at every address will be assigned a unique tree number. Individual trees/sites are inventoried and assigned numbers sequentially in the direction of vehicular traffic flow.

At each address, a separate number sequence is used for each side of lot (front, side, rear, and median/island). This means that the trees at the front may be numbered 1 through 999 and, if trees are located on the side, rear, or median/island of that same address, each side is also numbered consecutively, again beginning with the number 1 and always in the direction of vehicular traffic flow.

In the case of one-way streets, trees/sites are collected and assigned tree numbers as if they were two-way streets.

The following diagram gives you a little more detail on how tree/site numbering progresses as you move along a street:

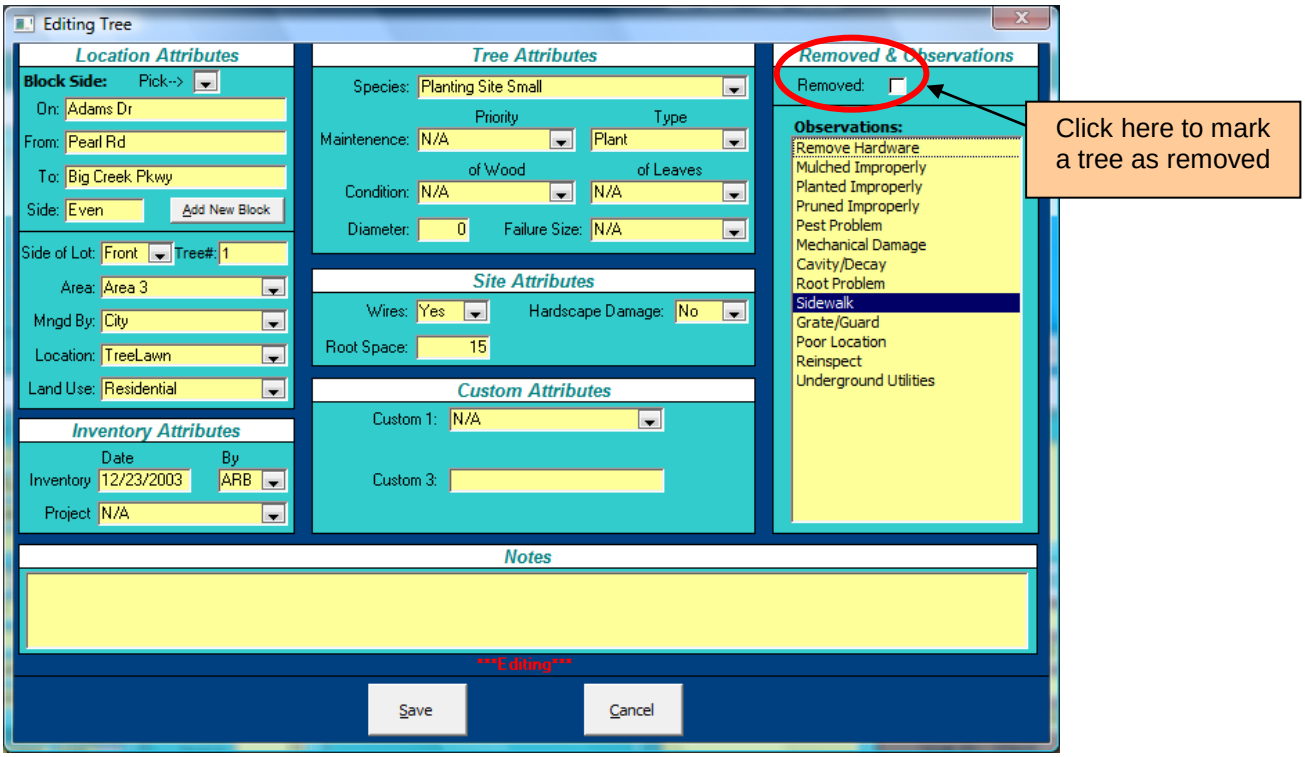


4.6g A Note on the Observations Area

Tree Tracker allows you to select multiple observations for each tree/site. Remember that you can add to or edit the list of observations in the Observations Lookup Table (go to section 5.3g: Observations Lookup Table to learn more about the Observations Lookup Table or section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table).

4.6h Editing (or Adding Information to) an Existing Tree/Site

When you click on the "Edit" button in the Trees / Planting Sites section, this window will appear:



NOTE

Shortcut

You can also bring up the same editing tree window by double-clicking anywhere on the current tree/site in the Trees / Planting Sites section.

In this window, all of the existing tree/site information appears, and you can make changes to any of these fields. If you are unsure of what to put in any of these fields, each field has been described in detail in Section 8.3: Trees / Planting Sites Section Field Definitions in Appendix 1.

.

Most often, you will be using the edit function to change a planting site into a tree once the tree has been planted, or mark the tree as removed by checking the “Removed” box in the upper right hand corner of the Editing Tree window.

When you are finished editing information, click "Save" or click "Cancel" to abandon editing a tree/site.

4.6i A Note on Marking a Tree As Removed

Once a tree has been removed in the field, it should be marked as removed in Tree Tracker rather than edited into a planting site or deleted.

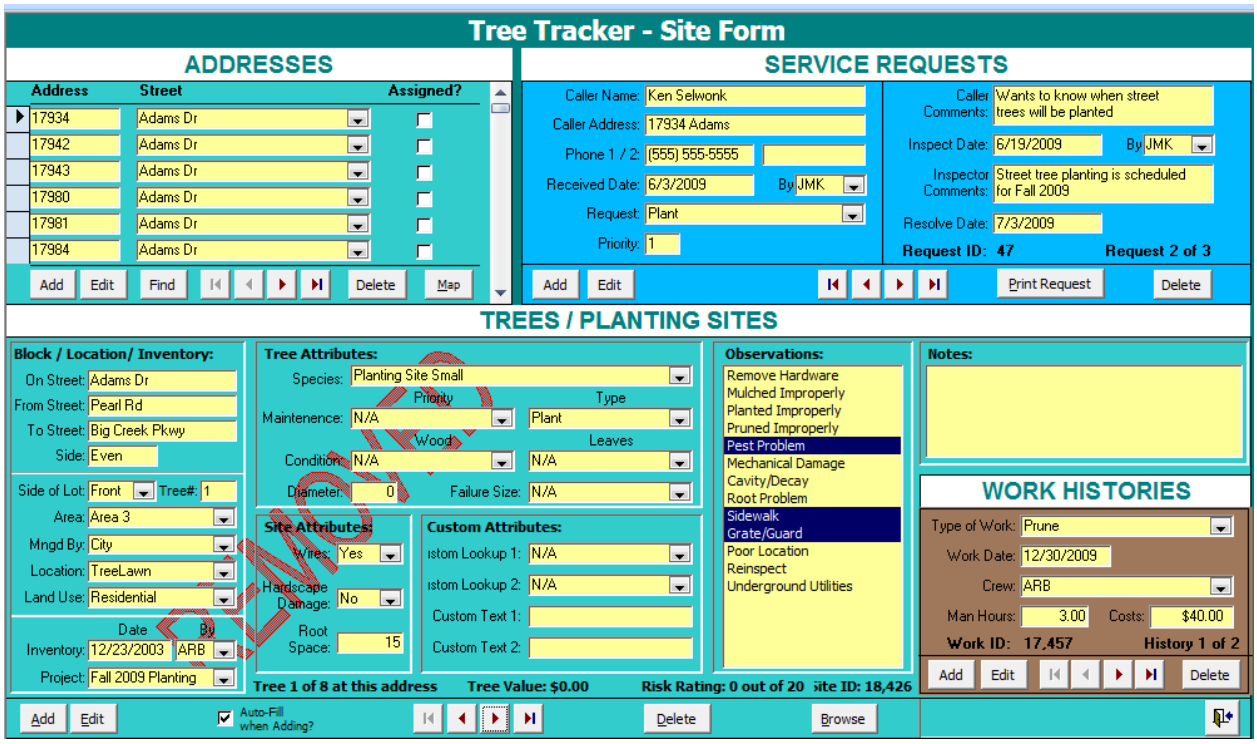
IMPORTANT NOTE

NEVER EDIT A TREE INTO A PLANTING SITE!

Instead, you should mark the old tree as removed and then add a new tree or planting site in its place.

This way, the information on the removed tree is maintained.

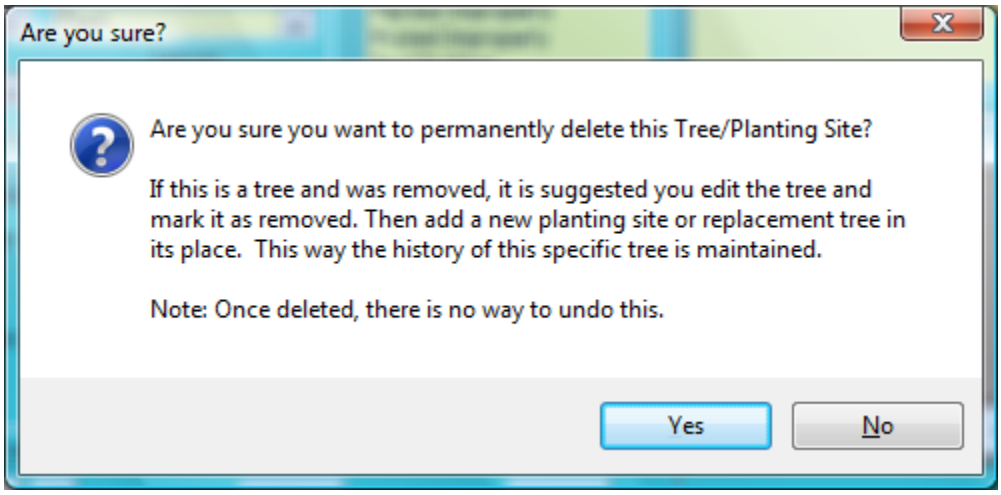
When a tree is marked as removed, it will appear on the Site Form like this:



4.6j Deleting a Tree/Site

You can delete a tree/site (although it is rare), perhaps because it was entered in error under the wrong address, for example. Make sure that this is what you want to do. If in doubt, DON'T DELETE!

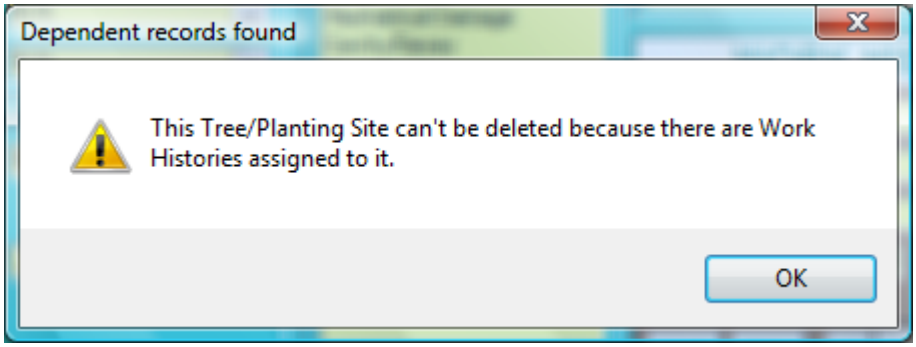
When you click the "Delete" button, this message will appear:



Please note that it is much wiser to mark a tree as removed and add a new tree or planting site than outright deleting the old tree.

Again, make sure that you really want to delete the tree/site. If so, click "Yes" and it will be removed.

If there is a work history associated with the tree/site you are trying to delete, this message will appear and you cannot delete the tree/site:



4.6k Tree Value

Tree Tracker calculates tree value using the Trunk Formula Method, as outlined in *The Guide for Plant Appraisal (Ninth Edition, 2000),* written by the Council of Tree and Landscape Appraisers (CTLA) and published by the International Society of Arboriculture (ISA).

4.6l What is the Risk Rating?

The risk rating is a feature of Tree Tracker that calculates the relative risk of a tree/site based on the information provided in five different fields in the Trees/Sites section. The five fields are:

- Land Use
- Maintenance: Priority
- Maintenance: Type
- Condition
- Failure Size

Each of these fields has its own corresponding lookup table where the master list of choices for that field is maintained. For each item choice on the master list, a risk rating has been assigned (usually on a scale of 0 to 4 with 4 being the highest risk). Tree Tracker totals up the risk rating number from all five fields to calculate a total risk rating. For example:

Field	Tree 1	Risk Rating	Tree 2	Risk Rating
Land Use	Park/Open Space	1	Shopping/School	4
Maintenance Priority	Immediate	3	Critical	4
Maintenance Type	Thin	1	Remove	4
Condition	Good	1	Dead/Dying	4
Failure Size	37+	4	25-36	4
Total Risk Rating		**10**		**20**

In this example, even though tree 1 has an immediate maintenance priority and is a big tree, it has a lower risk rating because it is in good condition in a park needing only to be thinned. Tree 2 is a big tree in a riskier place (a school), is dead or dying, and in critical need of being removed. It has the highest possible risk rating of 20 based on a risk scale of 0 to 4.

4.6m What is the Site ID?

You've probably noticed the Site ID in the Trees / Planting Sites section and wondered what it is and why it's there.

Each time a new tree/site is generated, Tree Tracker creates a unique Site ID number for it. That unique ID appears on reports.

Let's say you are looking at a report and you want to view or edit a tree/site and you know its Site ID number. It's a whole lot faster to search for the tree/site by its Site ID than by searching for the correct address, then the correct tree/site at that address.

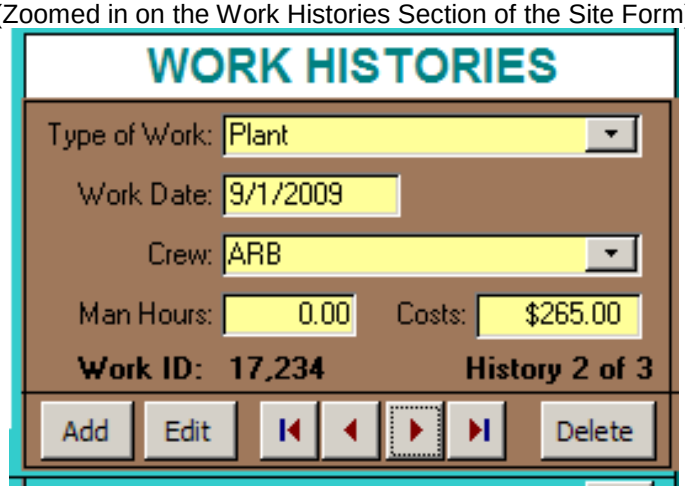
Remember that in the Addresses section, the "Find" button has an option to search by Site ID (go to section 4.4b: Using the "Find" Button for more information on the Find feature in

the Addresses Section). By knowing the Site ID and searching by it, you will get to the right tree/site faster!

4.7 The Work Histories Section of the Site Form in Detail

Let's take a look at the Work Histories section of the Site Form in depth and see what's required for each field.

(Zoomed in on the Work Histories Section of the Site Form)



TO SEE A DEFINITION OF EACH FIELD OF THE WORK HISTORIES SECTION, GO TO [SECTION 8.4: WORK HISTORIES SECTION FIELD DEFINITIONS](#) IN THE APPENDIX

You use the Work Histories section of the Site Form to maintain a work history for each specific tree/site at an address. Each work history entry is a record of work that has been performed on a specific tree or site.

NOTE

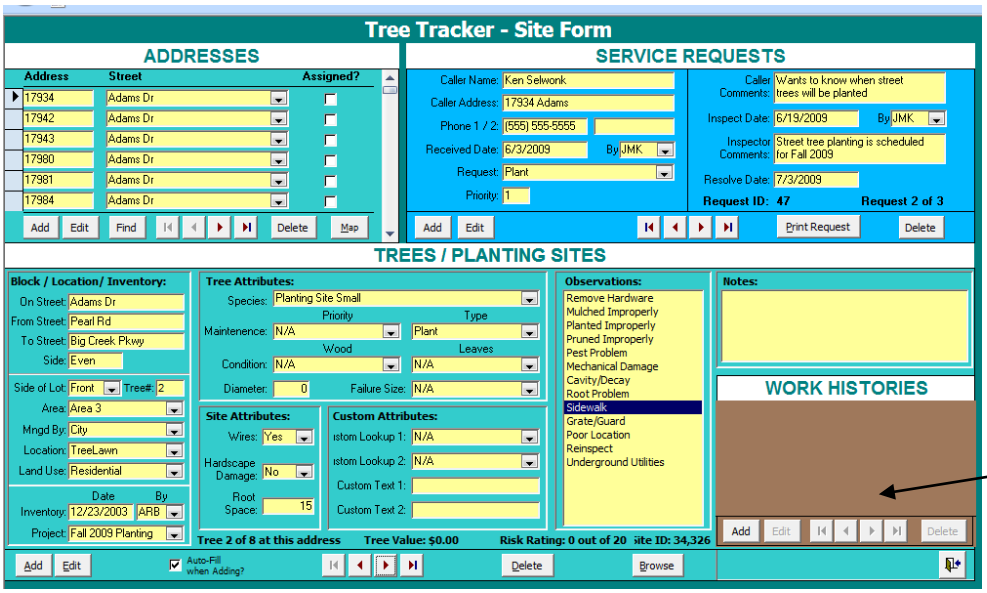
It is important to note that each work history is associated with a specific tree/site, not a specific address.

If at a specific address there are multiple trees/sites, not all trees/sites may have a work history, but some trees/sites may have multiple work histories.

In this section, you can quickly view the detailed information about a work history including the work done, the date the work was done, the crew, the man hours and the costs, add, edit, or delete work histories, and navigate between work histories if there are multiple work histories for a specific tree/site.

4.7a Viewing Existing Work Histories

When you choose a tree/site in the Trees / Planting Sites section, any associated work histories for that tree/site will appear in the Work Histories section. If there are no associated work histories, the screen will look like this:



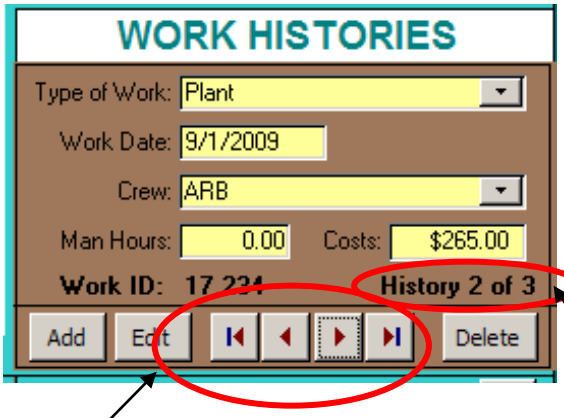
No work histories for this tree/site

Your only option in this example is to add a new work history for this address.

4.7b Viewing More Than One Work History

It is entirely possible that there may be more than one work history for a specific tree/site. If this is the case, you can use the navigation buttons to move between work histories. You can tell how many work histories there are for a site/tree by looking in the lower right-hand corner of the Work Histories section where it will show “History # of #". Tree Tracker displays the most recent work history first.

(Zoomed in on the Work Histories Section of the Site Form)



Use the navigation buttons to move between work histories

Three work histories exist at this tree/site and the 2nd one is displayed

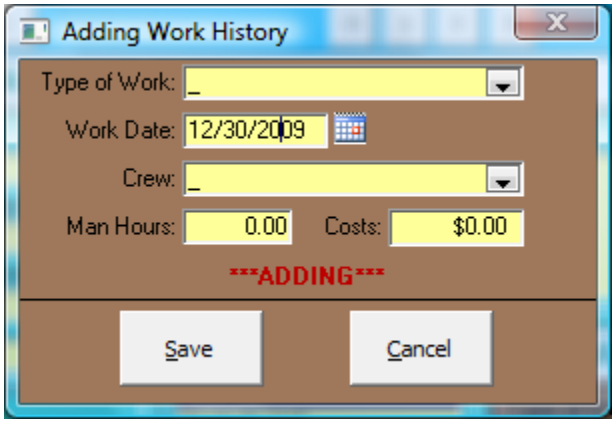
When you use the navigation buttons:

- |◄ takes you to the first work history for the tree/site
- ◄ takes you to the previous work history for the tree/site
- ► takes you to the next work history for the tree/site
- ►| takes you to the last work history for the tree/site

4.7c Adding a New Work History

IMPORTANT NOTE	BE SURE YOU HAVE CHOSEN THE CORRECT TREE/SITE AT THE CORRECT ADDRESS BEFORE ADDING A NEW WORK HISTORY! If you don't have the right tree/site, it's going to be tough to find the work history again.

When you click on the "Add" button in the Work Histories section, this window will appear:

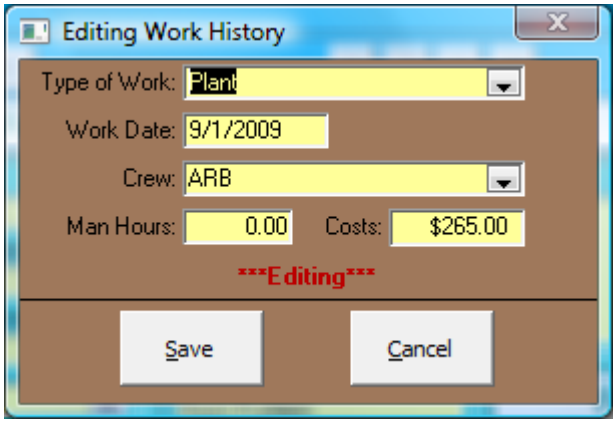


By default, the current date will automatically be entered in the work date, but can be changed if necessary. The date should be entered as MM/DD/YY or MM-DD-YY. You can also choose to select a date from the calendar icon next to the date box.

When you are finished adding information, click "Save" or click "Cancel" to abandon adding a work history.

4.7d Editing (or Adding Information to) an Existing Work History

When you click on the "Edit" button in the Work Histories section, this window will appear:



NOTE

Shortcut

You can also bring up the same Editing Work History window by double-clicking anywhere on the current work history in the Work Histories section.

In this window, all of the existing work history information appears, and you can make changes to any of these fields. If you are unsure of what values to enter for any of these fields, each field has been described in detail in section 8.4: Work Histories Section Field Definitions in Appendix 1.

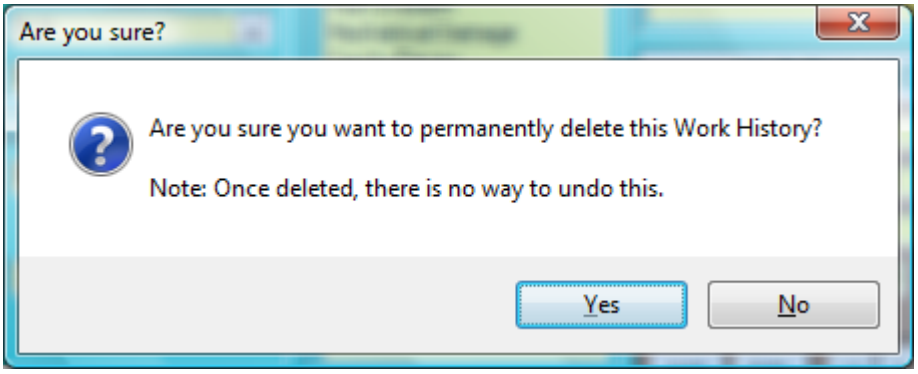
Typically, you will not need to edit or add additional information to a work history. The Work Histories section is designed so that you should be able to enter all of the information for each work history all at once following the completion of the work.

When you have finished adding information, click "Save". If you need to abandon adding a work history click "Cancel".

4.7e Deleting a Work History

You can delete a work history (although it is rare), One example of why you might want to delete a work history is perhaps because it was entered in error under the wrong tree/site. Make sure that this is what you want to do before completing this action, because once you have completed this action, it is not reversible. If in doubt, DON'T DELETE!

When you click the "Delete" button, this message will appear:



Again, make sure that you really want to delete the work history. If so, click "Yes" and it will be removed.

4.7f What is the Work ID?

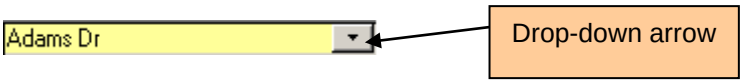
You've probably noticed the Work ID in the Work Histories section and wondered what it is and why it's there.

Each time a new work history is generated, Tree Tracker creates a unique Work ID number for it. That unique ID appears on reports. If you need to search for a work history, search by the tree/site's Site ID, and any work history for that tree/site will be displayed with the most recent work history first.

5. Lookup Tables

5.1 What Are Lookup Tables?

When entering data on the Site Form in Tree Tracker, you will see drop-down boxes in many fields. A drop-down box looks this:



These drop-down boxes are designed to allow you to choose from a pre-set list of items. You **cannot** enter whatever information you want into this field. You have to click on the drop-down arrow at the right side of the box to access the pre-set list of items from which to choose.

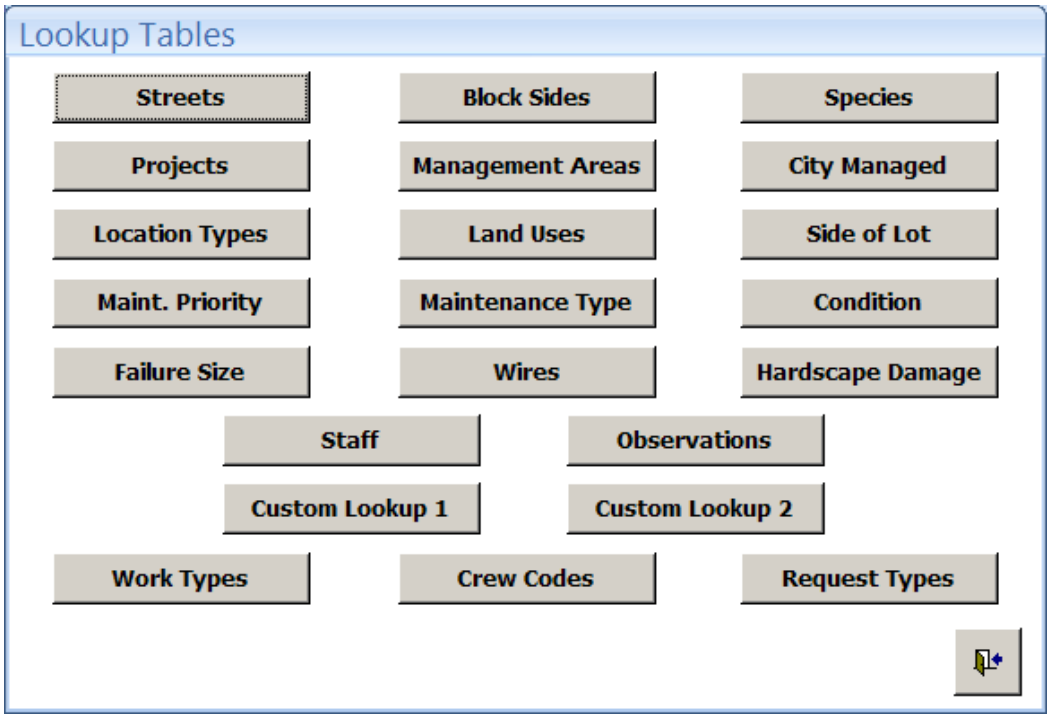
Lookup Tables are where you add, edit or delete items to a pre-set master list of items for a particular drop down box.

NOTE

In day-to-day use of Tree Tracker, you should not need to access the Lookup Tables menu.

You will use the Lookup Tables menu mostly when you first start to use Tree Tracker and customize it to your organization's needs, and then whenever you need to make additions or changes to the choices in drop-down boxes when using the Site Form.

When you click on the "Lookup Tables" button from Tree Tracker's main menu, this menu will appear:

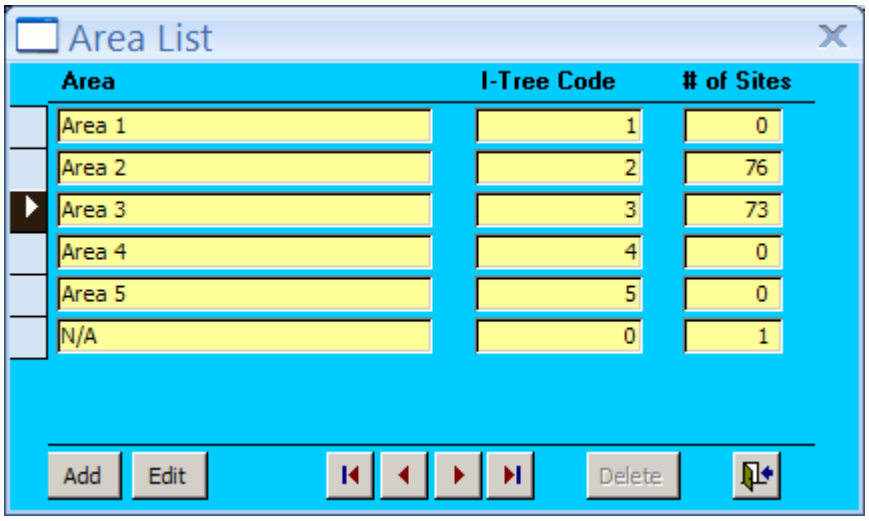


Each of these categories corresponds to one or more different drop-down boxes on the Site Form. From this menu, you can select the lookup table to which you want to add, edit or delete values. We'll discuss each of these lookup tables in detail later.

5.2 Adding, Editing, Finding, Navigating and Deleting Items in a Lookup Table

Let's use the Management Areas Lookup Table as an example. Let's say that you are entering data into Tree Tracker's Site Form and you notice that you need to add or change a management area's designation. In order to accomplish this, you will exit the Site Form and click on the "Lookup Tables" button on the main menu.

When you click on the "Management Areas" button, this screen will pop up:

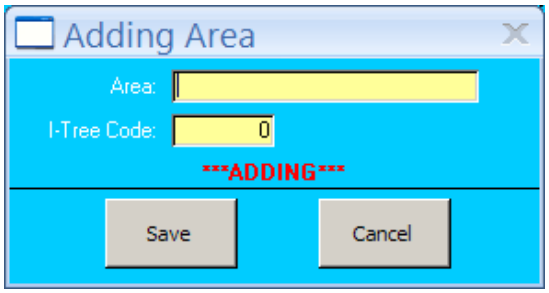


On this screen, you can view the different choices of management areas and their attributes, but you cannot type in the yellow boxes to add, edit or delete these lookup items.

To actually edit, add or delete lookup items, you will need to be familiar with the functions of the buttons at the bottom of the screen.

5.2a Adding an Item to a Lookup Table

Use this to add an entirely new item to a lookup table. When you click on "Add", this screen will appear:

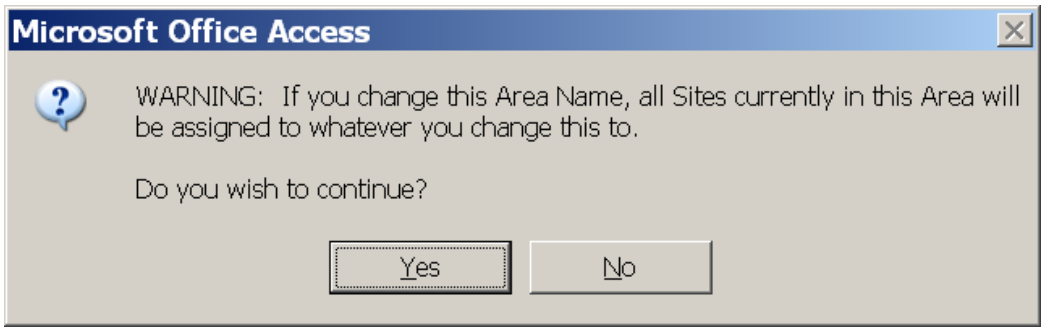


For example, if you want to create Area 6 for your management areas, you would do so here. You would type in Area 6 in the Area box and enter the proper I-Tree Code (more on that later) in its box. **You must enter all fields** and then click "Save". When you return to the Management Areas Lookup Table screen, Area 6 will now be visible as a selection, and can be chosen on the Site Form in the field that corresponds to the management area. You cannot add an item that already exists in the lookup table. For example, you couldn't add Area 5 because it already exists.

5.2b Editing an Item in a Lookup Table

Use the "Edit" button to change the attributes of an existing item, such as changing the name of an area. You need to select the item you wish to edit. A right hand arrow will appear to the left of the item when it is selected.

At this point, you can click the "Edit" button, and this warning will appear:

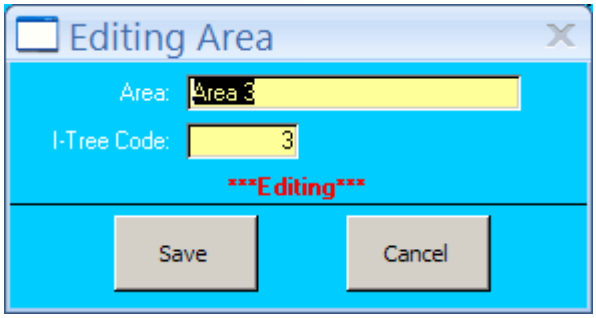


IMPORTANT NOTE

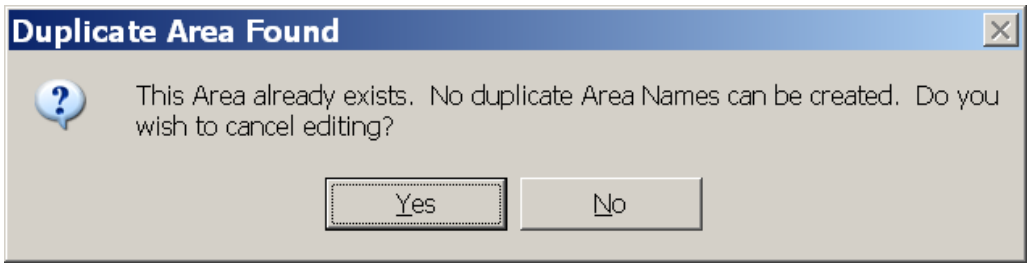
This warning serves as an important reminder that if you are editing an area name, for example, all sites previously assigned to this area will now be assigned to whatever new area name you choose.

BE CAREFUL THAT THIS IS REALLY WHAT YOU WANT TO DO BEFORE COMPLETING THIS ACTION!

Once you click "Yes", this screen pops up:



You can now edit the fields. In renaming the area name, if you accidentally rename an area to one that already exists, you'll get this message:

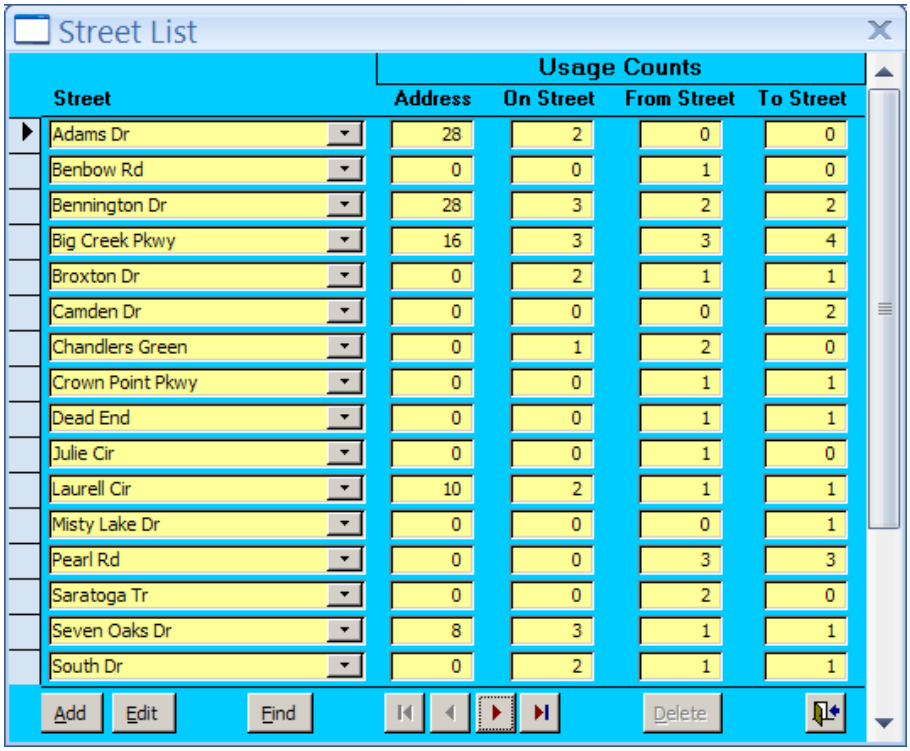


Once you have finished editing, click "Save". The edited information will now appear on the Management Area List and can be chosen on the Site Form in the field that corresponds to the management area.

5.2c Finding an Item in a Lookup Table

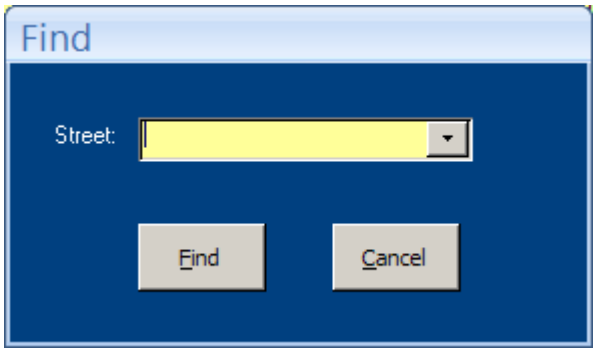
The "Find" button is only available in the Streets, Block Side and Species Lookup Tables. This function is useful for tables where there are typically hundreds of items, and is a convenient way to quickly find specific information.

Let's say that you are looking for information on a specific street, such as how many addresses on that street have been entered into the database. The problem is that there are hundreds of streets listed in the Streets Lookup Table.

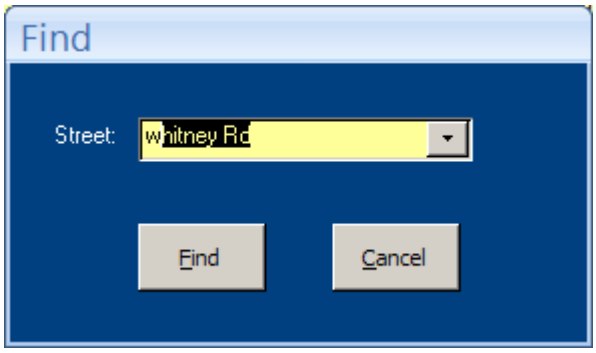


Street	Usage Counts: Address	On Street	From Street	To Street
Adams Dr	28	2	0	0
Benbow Rd	0	0	1	0
Bennington Dr	28	3	2	2
Big Creek Pkwy	16	3	3	4
Broxton Dr	0	2	1	1
Camden Dr	0	0	0	2
Chandlers Green	0	1	2	0
Crown Point Pkwy	0	0	1	1
Dead End	0	0	1	1
Julie Cir	0	0	1	0
Laurell Cir	10	2	1	1
Misty Lake Dr	0	0	0	1
Pearl Rd	0	0	3	3
Saratoga Tr	0	0	2	0
Seven Oaks Dr	8	3	1	1
South Dr	0	2	1	1

In this example, we'll search for Whitney Rd. By clicking on the "Find" button, this screen pops up:



As you type the first letters of the street you are looking for, the names of streets matching those letters will appear in the field until the street you are seeking appears. By typing the letter W, Whitney Rd. appears because it is the first street alphabetically in the W's.



Click "Find" and you will return to the Streets List with your street selected (see below).

5.2d Navigating Between Items in a Lookup Table

|◀ This is the "First" button, and will take you to the first item in the lookup table.

◀ This is the "Previous" button, and will take you to the previous item in the lookup table.

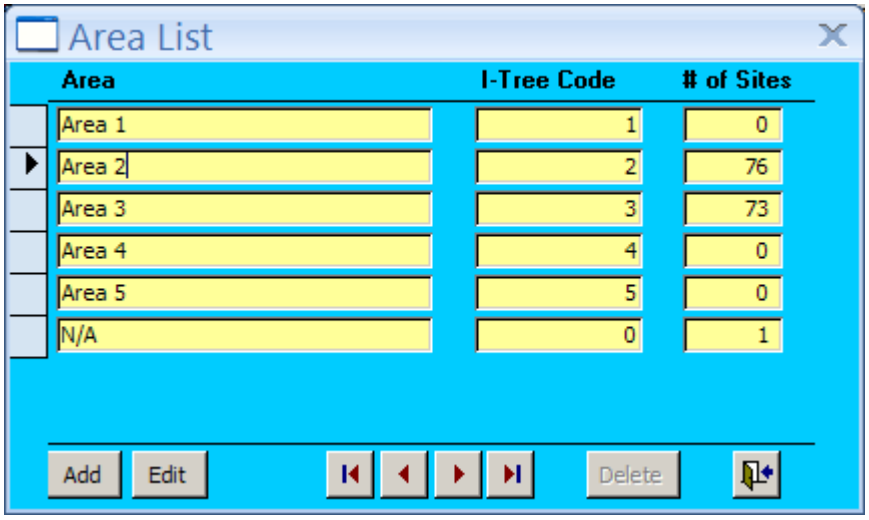
▶ This is the "Next" button, and will take you to the next item in the lookup table.

▶| This is the "Last" button, and will take you to the last item in the lookup table.

This is the exit button, and will exit this screen and return you to the previous menu.

5.2e Deleting an Item in a Lookup Table

Delete You can use the "Delete" button to remove unused items from a lookup table. You cannot remove items that have been used in the Site Form. For example, look at the Area Management Lookup Table below:



In this example, you cannot delete Area 2, Area 3 or N/A because they have been used in entering information on the Site Form. Because of this, the "Delete" button is dimmed out and not usable. If you select Area 1, Area 4 or Area 5, you can delete these because they have never been used.

IMPORTANT NOTE

Some lookup tables are used by multiple fields on the Site Form or within other lookup tables. For example, the Street Lookup Table is used to find the street name for the site's address, but also within the Block Sides Lookup Table to create block sides. You cannot delete the street from the Street Lookup Table if that street has been used in creating a block side.

5.3 The Lookup Tables In Depth

Now that we have described how to add, edit and delete items in lookup tables, let's look at each of the lookup tables in depth and discuss what information is needed for each.

5.3a Streets Lookup Table

The Streets Lookup Table corresponds to the “Street” field in the Addresses section of the Site Form. Streets maintained in the Streets Lookup Table are used within the Block Side Lookup Table to create block sides for the Block/Location/Inventory area of the Trees / Planting Sites section. When you click on the "Streets" button from the Lookup Tables menu, this screen appears:

Street List

Street	Usage Counts: Address	On Street	From Street	To Street
Adams Dr	28	2	0	0
Benbow Rd	0	0	1	0
Bennington Dr	28	3	2	2
Big Creek Pkwy	16	3	3	4
Broxton Dr	0	2	1	1
Camden Dr	0	0	0	2
Chandlers Green	0	1	2	0
Crown Point Pkwy	0	0	1	1
Dead End	0	0	1	1
Julie Cir	0	0	1	0
Laurell Cir	10	2	1	1
Misty Lake Dr	0	0	0	1
Pearl Rd	0	0	3	3
Saratoga Tr	0	0	2	0
Seven Oaks Dr	8	3	1	1
South Dr	0	2	1	1

Add Edit Find Delete

When adding or editing data in the Street List, all you need to provide is the street name. This screen also displays usage counts, which shows how often a specific lookup item has been used. For example, on the Street List above, there are 28 addresses on Adams Dr. that have been entered on the Site Form. Adams Dr. has also been used as the on-street twice on block sides. This is a good example of a lookup table where the information is used by more than one field on the Site Form.

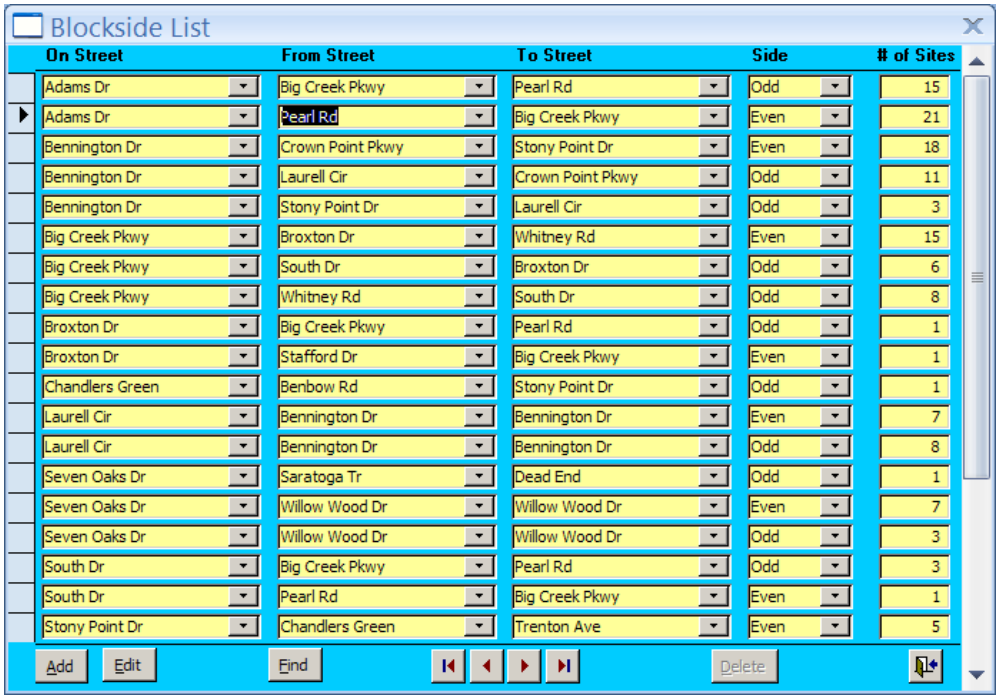
IMPORTANT NOTE

It is recommended that if a complete list of streets for your municipality or entity does not already exist (via a previous inventory that has been converted to Tree Tracker), you should enter all of the street names now.

This will avoid having to constantly add street names to the database in the future.

5.3b Block Sides Lookup Table

Block sides are made up of streets from the Streets Lookup Table, and are used to define a specific block. A block side is one side of a street segment between two adjacent cross streets. The Block Sides Lookup Table corresponds to the “On Street”, “From Street”, “To Street”, and “Side” fields of the Block/Location/Inventory area of the Trees / Planting Sites section of the Site Form. When you click on the "Block Sides" button on the Lookup Tables menu, this screen appears:



Blockside List

On Street	From Street	To Street	Side	# of Sites
Adams Dr	Big Creek Pkwy	Pearl Rd	Odd	15
Adams Dr	Pearl Rd	Big Creek Pkwy	Even	21
Bennington Dr	Crown Point Pkwy	Stony Point Dr	Even	18
Bennington Dr	Laurell Cir	Crown Point Pkwy	Odd	11
Bennington Dr	Stony Point Dr	Laurell Cir	Odd	3
Big Creek Pkwy	Broxton Dr	Whitney Rd	Even	15
Big Creek Pkwy	South Dr	Broxton Dr	Odd	6
Big Creek Pkwy	Whitney Rd	South Dr	Odd	8
Broxton Dr	Big Creek Pkwy	Pearl Rd	Odd	1
Broxton Dr	Stafford Dr	Big Creek Pkwy	Even	1
Chandlers Green	Benbow Rd	Stony Point Dr	Odd	1
Laurell Cir	Bennington Dr	Bennington Dr	Even	7
Laurell Cir	Bennington Dr	Bennington Dr	Odd	8
Seven Oaks Dr	Saratoga Tr	Dead End	Odd	1
Seven Oaks Dr	Willow Wood Dr	Willow Wood Dr	Even	7
Seven Oaks Dr	Willow Wood Dr	Willow Wood Dr	Odd	3
South Dr	Big Creek Pkwy	Pearl Rd	Odd	3
South Dr	Pearl Rd	Big Creek Pkwy	Even	1
Stony Point Dr	Chandlers Green	Trenton Ave	Even	5

Add Edit Find Delete

When adding or editing data in the Block Side List, you will need to provide the appropriate on-street, from-street and to-street that identifies a block, as well as whether the block side has even or odd addresses. Note that the list of streets you are choosing from is maintained in the Streets Lookup Table. If the street you are looking for is not on the list, you need to add it in the Streets Lookup Table. You can also see the number of sites that have been entered using each block side from this screen.

Also note that Tree Tracker provides a shortcut directly to the adding a new block side window from the Site Form when adding a new tree/site. This is the only shortcut to a lookup table from the Site Form.

5.3c Species Lookup Table

Note: Tree Tracker will be delivered with a default list of species.

The Species Lookup Table corresponds to the “Species” field in the Tree Attributes area of the Trees / Planting Sites section of the Site Form. When you click on the "Species" button on the Lookup Tables menu, this screen appears:

Species List

Common Name	Code	Family	Genus	Species	Cultivar	Rating	Size	# of Trees	Conifer/Hardwood	Deciduous/Evergreen	Pruning Cycle
Acacia, Earleaf	ACAU		Acacia	auriculaeformis		60%	Small	0	Hardwood	Deciduous	0
Acacia, Sweet	ACFA		Acacia	farnesiana		70%	Small	0	Hardwood	Deciduous	0
Alder, European	ALGL	Betulaceae	Alnus	glutinosa		65%	Medium	0	Hardwood	Deciduous	0
Alder, Italian	ALCO	Betulaceae	Alnus	cordata		70%	Large	0	Hardwood	Deciduous	0
Alder, Other	AL	Betulaceae	Alnus	spp.		65%	Medium	0	Hardwood	Deciduous	0
American Sycamore	PLOC	Platanaceae	Platanus	occidentalis		70%	Large	0	Hardwood	Deciduous	0
Apple, Common	MAPU	Rosaceae	Malus	pumila		50%	Small	0	Hardwood	Deciduous	0
Apricot	PRAR	Rosaceae	Prunus	armeniaca		30%	Small	0	Hardwood	Deciduous	0
Arborvitae, American	THOC	Cupressaceae	Thuja	occidentalis		60%	Medium	0	Conifer	Evergreen	0
Arborvitae, Oriental	THOR	Cupressaceae	Thuja	orientalis		65%	Medium	0	Conifer	Evergreen	0
Arborvitae, Western	THPL		Arborvitae	plicata		70%	Large	0	Conifer	Evergreen	0
Ash, Arizona	FRBE	Oleaceae	Fraxinus	berlandieriana		70%	Medium	0	Hardwood	Deciduous	0
Ash, Black	FRNI	Oleaceae	Fraxinus	nigra		40%	Medium	0	Hardwood	Deciduous	0
Ash, Blue	FRQU	Oleaceae	Fraxinus	quadrangulata		70%	Medium	0	Hardwood	Deciduous	0
Ash, Carolina	FRCA	Oleaceae	Fraxinus	caroliniana		70%	Medium	0	Hardwood	Deciduous	0
Ash, European	FREX	Oleaceae	Fraxinus	excelsior		50%	Large	0	Hardwood	Deciduous	0
Ash, Flowering	FROR	Oleaceae	Fraxinus	ornus		30%	Medium	0	Hardwood	Deciduous	0
Ash, Green	FRPE	Oleaceae	Fraxinus	pennsylvanica		75%	Large	6	Hardwood	Deciduous	0
Ash, Green-Cimmeron	FREPC	Oleaceae	Fraxinus	pennsylvanica	Cimmazan	75%	Large	0	Hardwood	Deciduous	0
Ash, Green-Marshall's Seed	FRPEMS	Oleaceae	Fraxinus	pennsylvanica	Marshall's Seedles	75%	Large	0	Hardwood	Deciduous	0
Ash, Green-Patmore	FRPEP	Oleaceae	Fraxinus	pennsylvanica	Patmore	75%	Medium	0	Hardwood	Deciduous	0
Ash, Green-Summit	FRPES	Oleaceae	Fraxinus	pennsylvanica	Summit	75%	Medium	0	Hardwood	Deciduous	0

Add Edit Find Delete

When adding or editing data in the Species List, you will notice that there are several pieces of information needed for each entry. We will go through each item needed for each species entry now.

- Common Name
  This is how the species name will appear on most reports.

IMPORTANT NOTE

When adding a new species, it is recommended that you list the genus’s common name first so it will appear alphabetically with other species of the same genus. For example, for a Red Maple, the common name should be Maple, Red so it appears with all of the other maples alphabetically, not Red Maple, where it would appear alphabetically under R.

- Code
  This is the abbreviated species code. It is typically made up of the first two letter of the genus, the first two letters of the species, and the first two letters of the cultivar (if any). You can also add a number to the code if by chance more than one species shares the same code. For example, if you look at the Species List above, you'll see that Ash, Blue has a code of FRQU. Its genus is **Fr**axinus and its species is **Qu**adrangulata.

- Family
  You should enter the appropriate description for the species.

- Genus
  You should enter the appropriate description for the species.

- Species
  You should enter the appropriate description for the species.

- Cultivar
  You should enter the appropriate description (if any) for the species.

- Rating
  This field is used in calculating the tree's value. The higher the number, the better the species does in your area. A palm tree in Alaska would have a low rating, but a higher rating in Florida. The rating is a percentage between 0 and 100.

- Size
  Choose the growth size of the mature tree (small, medium or large).

- Conifer/Hardwood
  Choose whether the species is a conifer, hardwood, palm or shrub.

- Deciduous/Evergreen
  Choose whether the species is deciduous or evergreen.

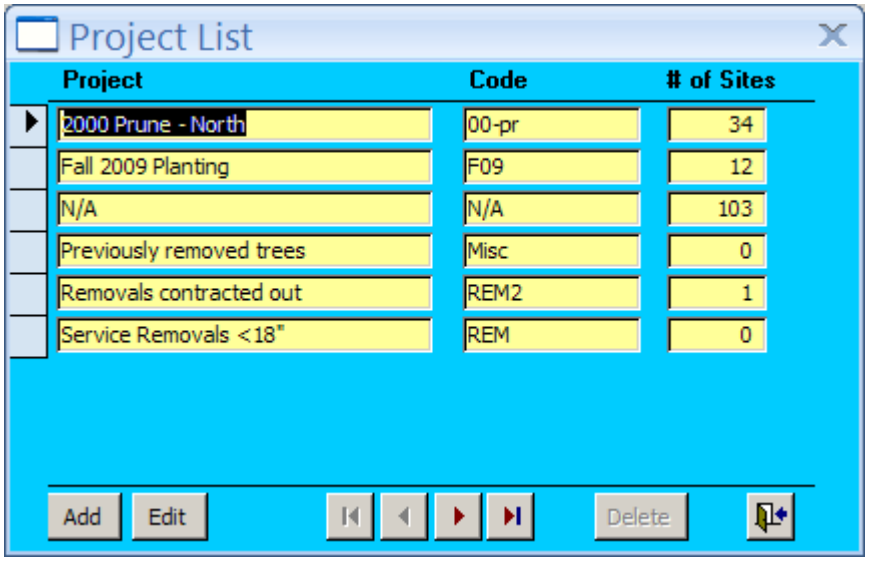
- Pruning Cycle
  Enter the number of months between routine prunings for the species.

You can also see the number of sites that have been entered using each species from this screen (# of trees).

5.3d Projects Lookup Table

The Projects Lookup Table is used to maintain a list of project titles. For example, if there is a specific project that is being undertaken, such as a fall planting, Tree Tracker allows you to associate site entries to that project.

The Projects Lookup Table corresponds to the “Project” field in the Block/Location/Inventory area of the Trees / Planting Sites section of the Site Form. When you click on the "Projects" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the Project List, you will need to provide the following:

- Project
  Enter the appropriate name for a project.

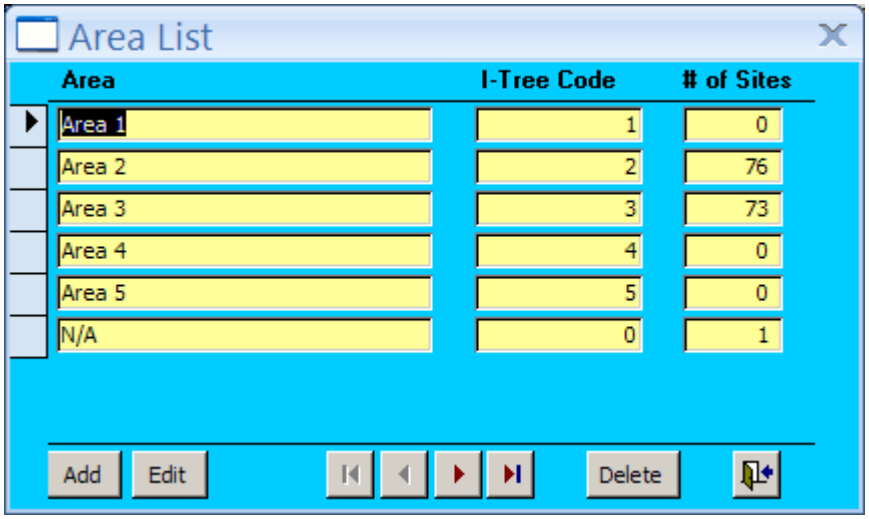
- Code
  Create a short abbreviation to use that will appear on some reports.

You can also see the number of sites that have been entered using each project from this screen.

5.3e Management Areas Lookup Table

The Management Areas Lookup Table is used to maintain a list of distinct geographical sections of a municipality. These areas could be things like quadrants, wards, precincts, zones and even subdivisions.

The Management Areas Lookup Table corresponds to the “Area” field in the Block/Location/Inventory area of the Trees / Planting Sites section of the Site Form. When you click on the "Management Areas" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the Management Areas List, you will need to provide the following:

- Area
  Enter the appropriate name for the area.

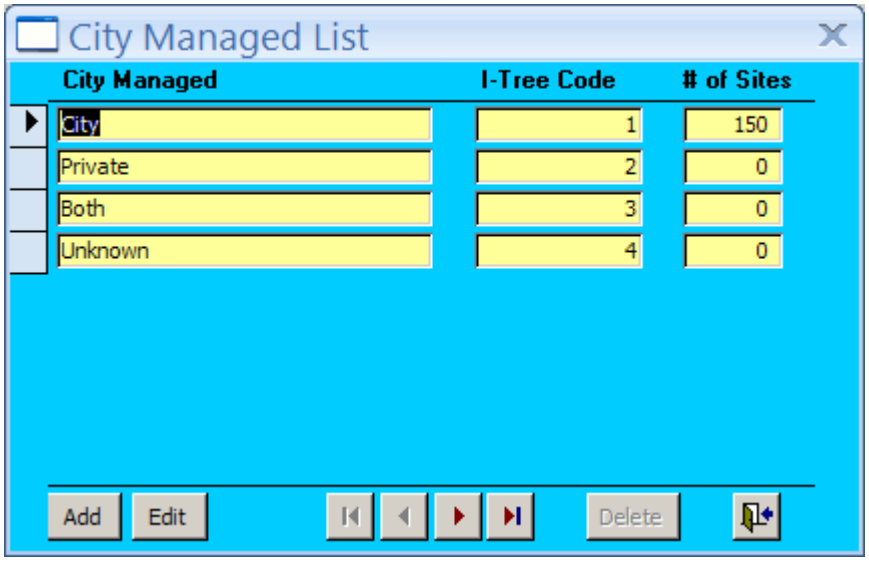
- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each management area. In Tree Tracker, you need to assign a unique number to represent each area. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.

You can also see the number of sites that have been entered using each area from this screen.

5.3f City Managed Lookup Table

The City Managed Lookup Table is used to maintain a list of management entities. Typically, the management entity is city, private, unknown or both, but you can create other management entities as needed.

The City Managed Lookup Table corresponds to the “Mngd By” field in the Block/Location/Inventory area of the Trees / Planting Sites section of the Site Form. When you click on the "City Managed" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the City Managed List, you will need to provide the following:

- City Managed
  Enter the appropriate management entity.

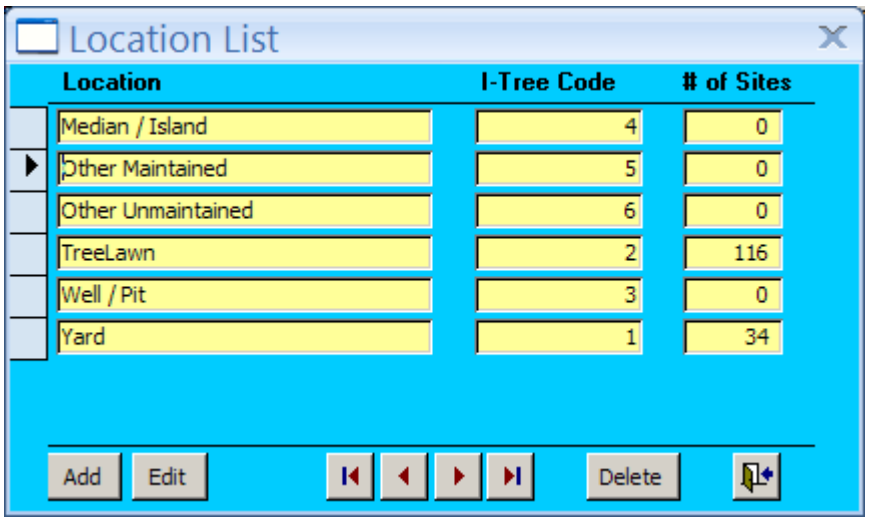
- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each managed-by entity. In Tree Tracker, you need to assign a unique number to represent each entity. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.

You can also see the number of sites that have been entered using each management entity from this screen.

5.3g Location Types Lookup Table

The Location Types Lookup Table is used to maintain a list of types of locations where trees/sites exist. Examples include tree lawns, medians, parks and yards, but any location description can be added.

The Location Types Lookup Table corresponds to the “Location” field in the Block/Location/Inventory area of the Trees / Planting Sites section of the Site Form. When you click on the "Location Types" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the Location List, you will need to provide the following:

- Location
  Enter the appropriate type of location.

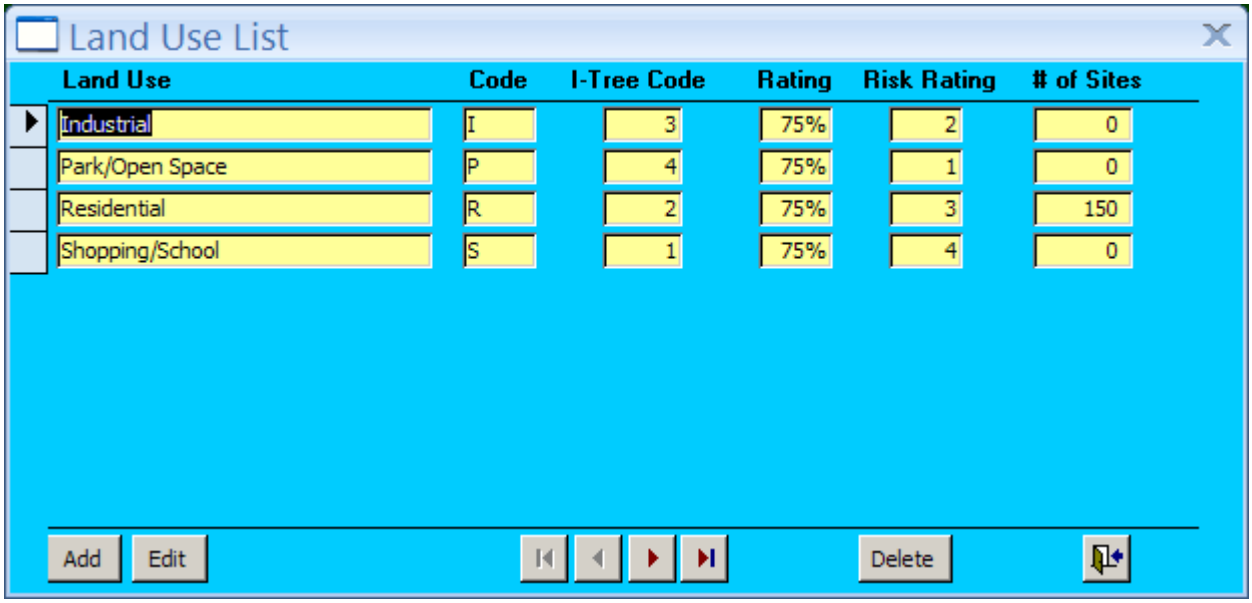
- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each location type. In Tree Tracker, you need to assign a unique number to represent each location type. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.

You can also see the number of sites that have been entered using each location from this screen.

5.3h Land Uses Lookup Table

The Land Uses Lookup Table is used to maintain a list of types of land utilization. Typical examples include residential, industrial, parks, schools, shopping, etc.

The Land Uses Lookup Table corresponds to the “Land Use” field in the Block/Location/Inventory area of the Trees / Planting Sites section of the Site Form. When you click on the "Land Uses" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the Land Use List, you will need to provide the following:

- Land Use
  Enter the appropriate type of land.

- Code
  Create a short abbreviation to use that will appear on some reports.

- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each type of land utilization. In Tree Tracker, you need to assign a unique number to represent each type of land utilization. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.

- Rating
  This field is used in calculating the tree's value. The higher the number, the more desirable the tree is in a specific land use type. For example, residential trees are more desirable (i.e. more valuable) than the same trees in an industrial area. The rating is a percentage between 0 and 100.

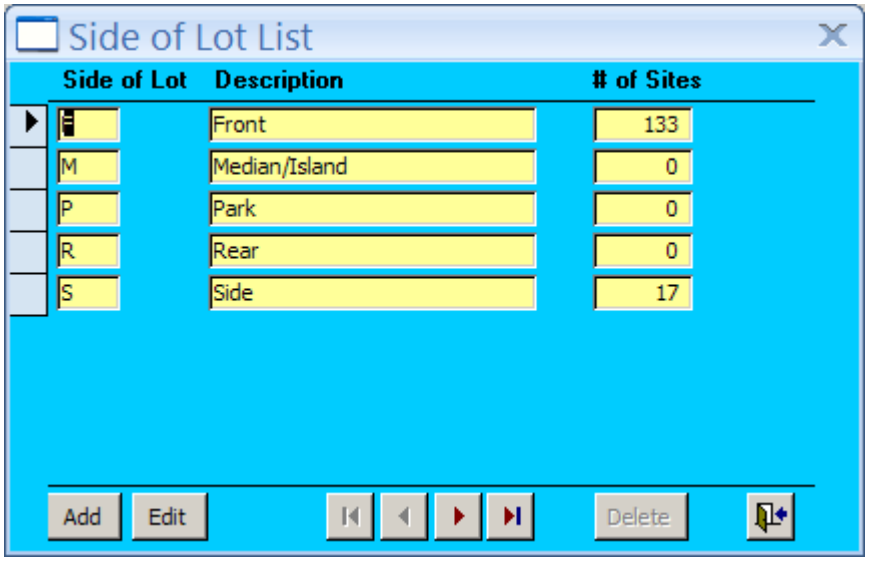
- Risk Rating
  This field is a part of Tree Tracker's risk rating assessment feature. You assign a number to each land use type by rating its relative risk to other types of land use. The higher the number, the higher the risk. For example, if a tree fails in a school area, it has a higher risk of causing damage or injury than a tree in an open area. You can choose what scale to use (such as 0-9 or 0-4, with 0 being no risk) **but you should use the same scale for all lookup tables that are a part of the risk value assessment**. For more detailed information on the risk rating and how it is calculated, go to section 4.6l: What Is the Risk Rating?

You can also see the number of sites that have been entered using each type of land from this screen.

5.3i Side of Lot Lookup Table

The Side of Lot Lookup Table is used to maintain a list of what side of the lot the tree or site is on. Typical values are front, side, rear, median and park.

The Side of Lot Lookup Table corresponds to the “Side of Lot” field in the Block/Location/Inventory area of the Trees / Planting Sites section of the Site Form. When you click on the "Side of Lot" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the Side of Lot List, you will need to provide the following:

- Side of Lot
  Choose a unique single letter abbreviation to use that will appear on most reports.

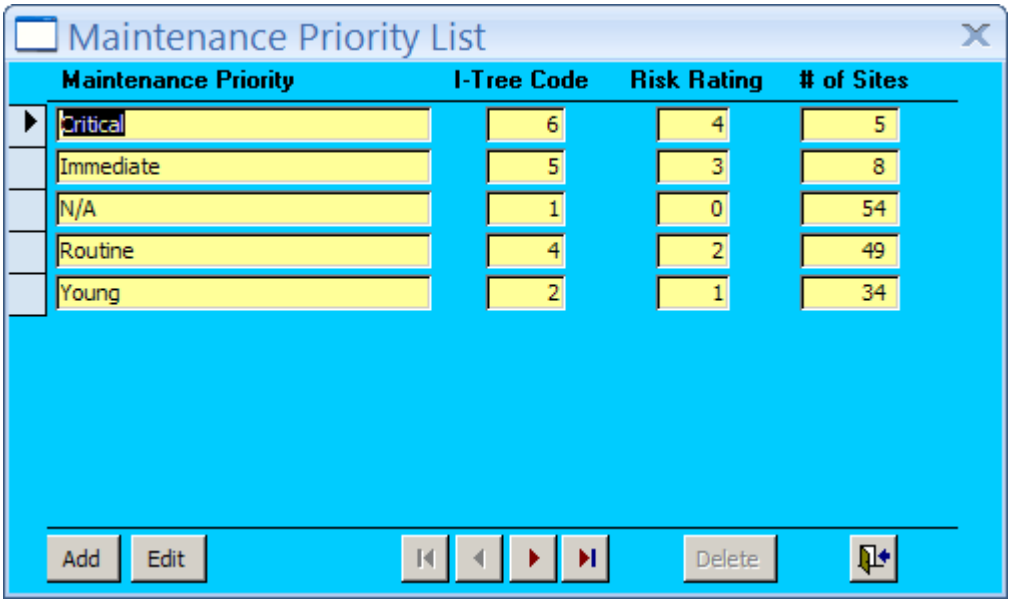
- Description
  Enter the appropriate description for the side of lot.

You can also see the number of sites that have been entered using each side of lot from this screen.

5.3j Maintenance Priority Lookup Table

The Maintenance Priority Lookup Table is used to maintain a list of maintenance priorities. Maintenance priorities are used to determine the order in which work needs to be done based on the condition of the tree/site.

The Maintenance Priority Lookup Table corresponds to the “Maintenance: Priority” field in the Tree Attributes area of the Trees / Planting Sites section of the Site Form. When you click on the "Maint. Priority" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the Maintenance Priority List, you will need to provide the following:

- Maintenance Priority
  Enter the appropriate description for the maintenance priority.

- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each type of maintenance priority. In Tree Tracker, you need to assign a unique number to represent each maintenance priority. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.

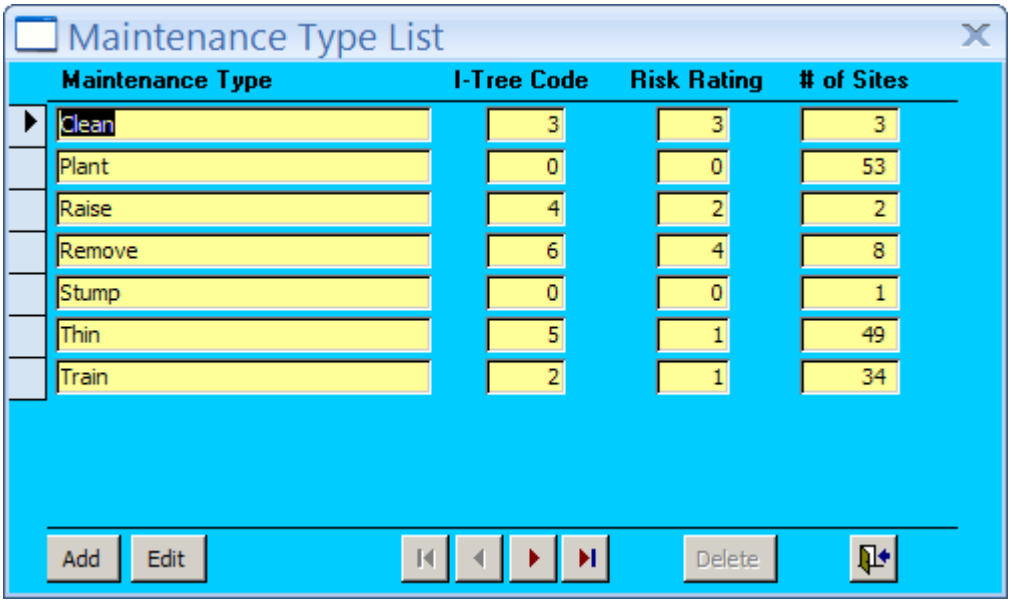
- Risk Rating
  This field is a part of Tree Tracker's risk rating assessment feature. You assign a number to each maintenance priority type by rating its relative risk to other types of maintenance priorities. The higher the number, the higher the risk. For example, if a tree is considered critical, it has a higher risk of causing damage or injury than a tree that is considered routine or young. You can choose what scale to use (such as 0-9 or 0-4, with 0 being no risk) **but you should use the same scale for all lookup tables that are a part of the risk value assessment**. For more detailed information on the risk rating and how it is calculated, go to section 4.6l: What Is the Risk Rating?

You can also see the number of sites that have been entered using each maintenance priority from this screen.

5.3k Maintenance Type Lookup Table

The Maintenance Type Lookup Table is used to maintain a list of types of maintenance **to be done**. This is different from the Work Types List, which lists work that *has been done*. Common examples of maintenance types can be seen in the screenshot below. For instance, plant indicates that the site is a planting site and stump indicates that there is a stump at the site.

The Maintenance Type Lookup Table corresponds to the “Maintenance: Type” field in the Tree Attributes area of the Trees / Planting Sites section of the Site Form. When you click on the "Maintenance Type" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the Maintenance Type List, you will need to provide the following:

- Maintenance Type
  Enter the appropriate description for the maintenance type.

- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each type of maintenance. In Tree Tracker, you need to assign a unique number to represent each maintenance type. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.

- Risk Rating
  This field is a part of Tree Tracker's risk rating assessment feature. You assign a number to each maintenance type by rating its relative risk to other types of maintenance. The higher the number, the higher the risk. For example, if a tree

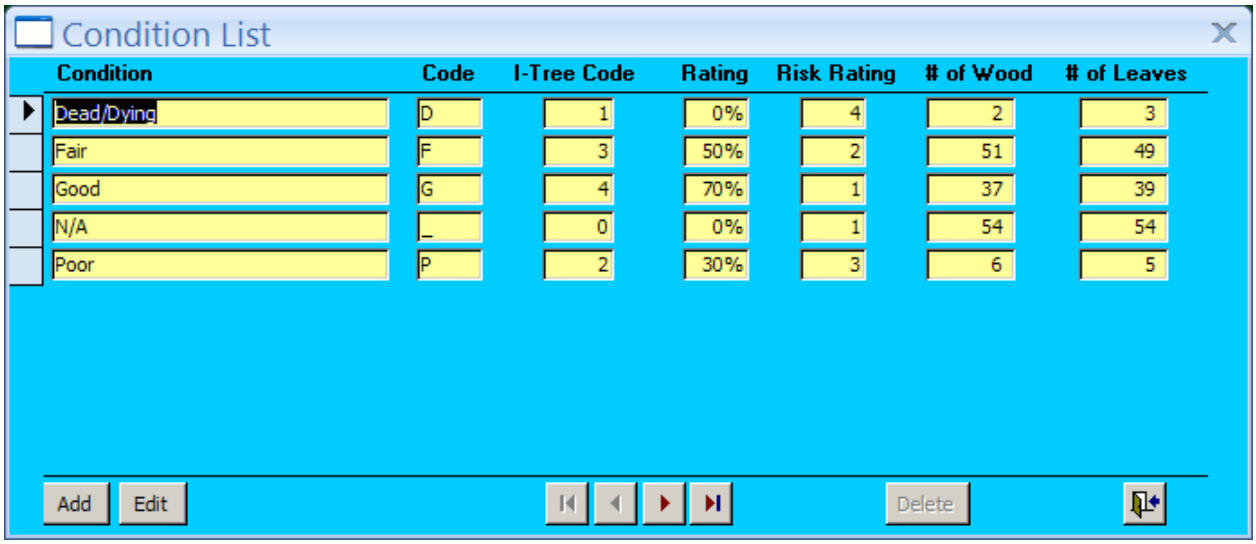
needs to be removed, it has a higher risk of causing damage or injury than a tree that needs to be trained or thinned. You can choose what scale to use (such as 0-9 or 0-4, with 0 being no risk**) but you should use the same scale for all lookup tables that are a part of the risk value assessment**. For more detailed information on the risk rating and how it is calculated, go to section 4.6l: What Is the Risk Rating?

You can also see the number of sites that have been entered using each maintenance type from this screen.

5.3l Condition Lookup Table

The Condition Lookup Table is used to maintain a list of types of conditions for both wood and leaves.

The Condition Lookup Table corresponds to the “Condition: Wood” and “Condition: Leaves” fields in the Tree Attributes area of the Trees / Planting Sites section of the Site Form. When you click on the "Condition" button on the Lookup Tables menu, this screen appears:



Condition	Code	I-Tree Code	Rating	Risk Rating	# of Wood	# of Leaves
Dead/Dying	D	1	0%	4	2	3
Fair	F	3	50%	2	51	49
Good	G	4	70%	1	37	39
N/A	_	0	0%	1	54	54
Poor	P	2	30%	3	6	5

When adding or editing data in the Condition List, you will need to provide the following:

- Condition
  Enter the appropriate description for the condition.

- Code
  Choose a unique single letter abbreviation to use that will appear on reports.

- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each type of condition. In Tree Tracker, you need to assign a unique number to represent each condition. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.

- Rating
  This field is used in calculating the tree's value. The higher the number, the better the condition of the tree. For example, a tree in good condition would get a higher percentage rating than a dead/dying tree. The rating is a percentage between 0 and 100.

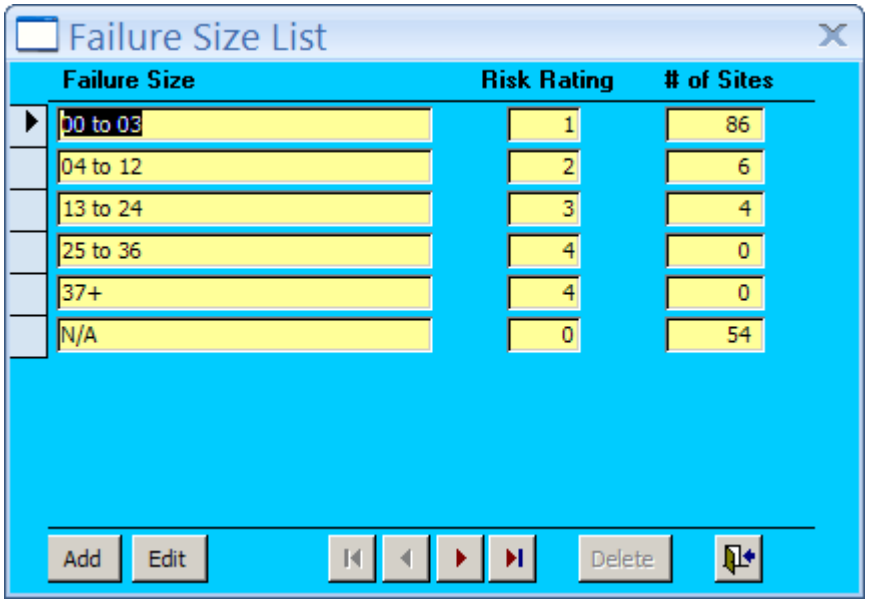
- Risk Rating
  This field is a part of Tree Tracker's risk rating assessment feature. You assign a number to each condition type by rating its relative risk to other conditions. The higher the number, the higher the risk. For example, if a tree is dead or dying, it has a higher risk of causing damage or injury than a tree that is in good condition. You can choose what scale to use (such as 0-9 or 0-4, with 0 being no risk) **but you should use the same scale for all lookup tables that are a part of the risk value assessment**. For more detailed information on the risk rating and how it is calculated, go to section 4.6l: What Is the Risk Rating?

You can also see the number of sites that have been entered using each condition type of wood (# of wood) and condition type of leaves (# of leaves) from this screen.

5.3m Failure Size Lookup Table

The Failure Size Lookup Table is used to maintain a list of ranges (in inches) of the largest section of a tree that is likely to fail.

The Failure Size Lookup Table corresponds to the “Failure Size” field in the Tree Attributes area of the Trees / Planting Sites section of the Site Form. When you click on the "Failure Size" button on the Lookup Tables menu, this screen appears:



When adding or editing data in the Failure Size List, you will need to provide the following:

- Failure Size
  Enter the appropriate description for the failure size (in inches). To keep the list alphabetized, it is recommended that you add a zero before single digit sizes (IE: '03' instead of just '3').

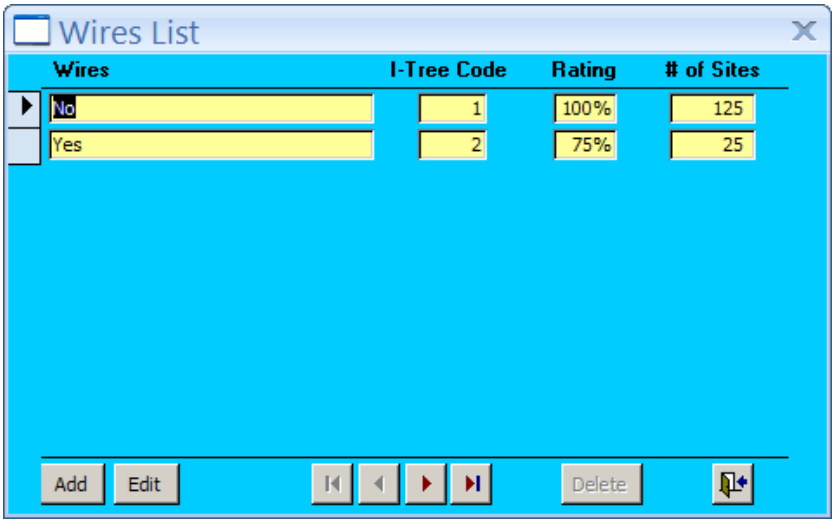
- Risk Rating
  This field is a part of Tree Tracker's risk rating assessment feature. You assign a number to each failure size range by rating its relative risk to other failure size ranges. The higher the number, the higher the risk. For example, if a tree branch of 25-36 inches or 37 inches or greater has the possibility of failure, it has a higher risk of causing damage or injury than a tree that has much smaller branches with the possibility of failure. You can choose what scale to use (such as 0-9 or 0-4, with 0 being no risk) **but you should use the same scale for all lookup tables that are a part of the risk value assessment**. For more detailed information on the risk rating and how it is calculated, go to section 4.6l: What Is the Risk Rating?

You can also see the number of sites that have been entered using each failure size from this screen.

5.3n Wires Lookup Table

The Wires Lookup Table uses yes/no values and most likely will not need to be modified at any time. However, the Wires List can be modified to reflect high voltage, low voltage, both or none.

The Wires Lookup Table corresponds to the "Wires" field in the Site Attributes area of the Trees / Planting Sites section of the Site Form. When you click on the "Wires" button on the Lookup Tables menu, this screen appears:



Although it is possible to add, edit or delete in the Wires List, it is unlikely that you will need to. If you do need to, the following information will be needed:

- Wires
  Enter the appropriate description for the wires.

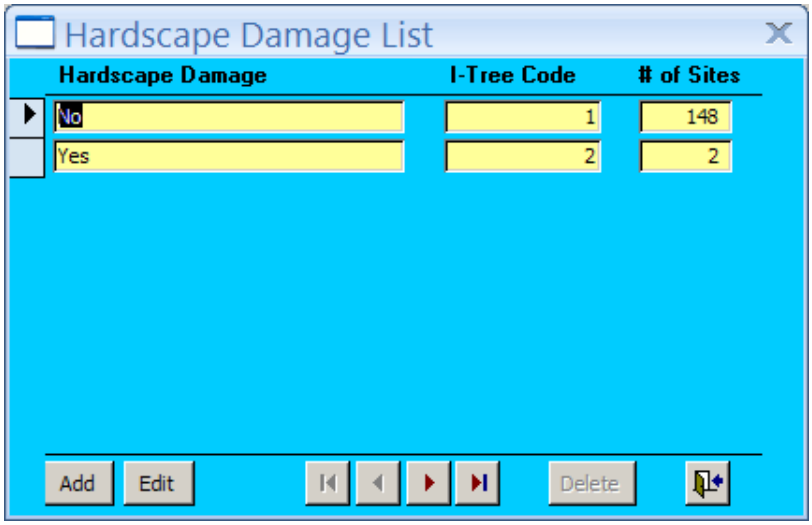
- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each type of wire. In Tree Tracker, you need to assign a unique number to represent each wire. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.
- Rating
  This field is used in calculating the tree's value. The higher the number, the better. For example, a tree under wires is not as valuable as a tree free of wires. The rating is a percentage between 0 and 100.

You can also see the number of sites that have been entered using each wires category from this screen.

5.3o Hardscape Damage Lookup Table

The Hardscape Damage Lookup Table uses yes/no values and most likely will not need to be modified at any time. However, the Hardscape Damage List can be modified to indicate what type of hardscape damage has occurred.

The Hardscape Damage Lookup Table corresponds to the “Hardscape Damage” field in the Site Attributes area of the Trees / Planting Sites section of the Site Form. When you click on the "Hardscape Damage" button on the Lookup Tables menu, this screen appears:



Although it is possible to add, edit or delete in the Hardscape Damage List, it is unlikely that you will need to. If you do need to, the following information will be needed:

- Hardscape Damage
  Enter the appropriate description for the type of hardscape damage.

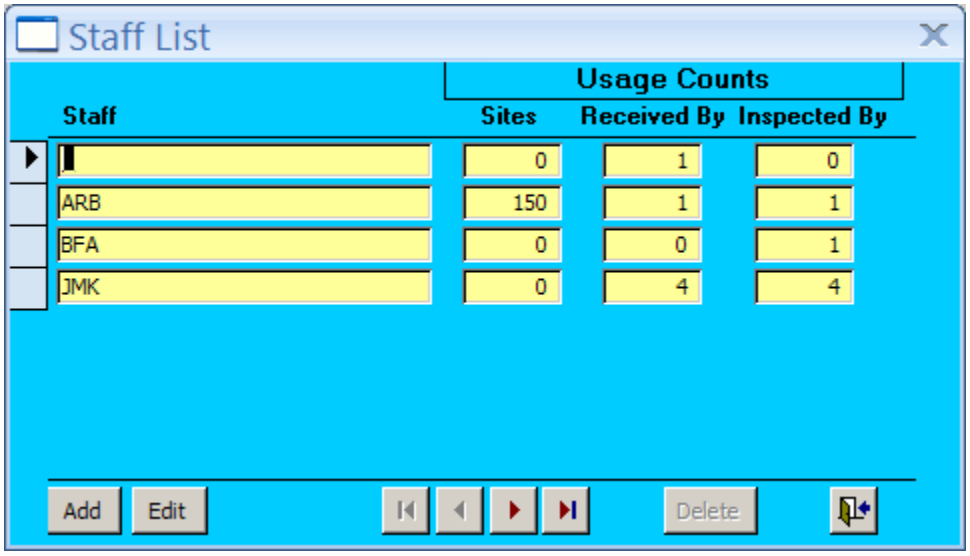
- I-Tree Code
  When exporting to I-Tree, I-Tree requires a numeric value that represents each type of hardscape damage. In Tree Tracker, you need to assign a unique number to represent each hardscape damage type. Please see I-Tree's documentation for details on how to import and assign I-Tree codes.

You can also see the number of sites that have been entered using each hardscape damage category from this screen.

5.3p Staff Lookup Table

The Staff Lookup Table is used to maintain a list of those people who will inventory and inspect trees and those who will receive and enter service requests.

The Staff Lookup Table corresponds to the “Inventory By” field in the Block/Location/Inventory area of the Trees / Planting Sites section of the Site Form and the “Received By” and “Inspect By” fields in the Service Requests section of the Site Form. When you click on the "Staff" button on the Lookup Tables menu, this screen appears:



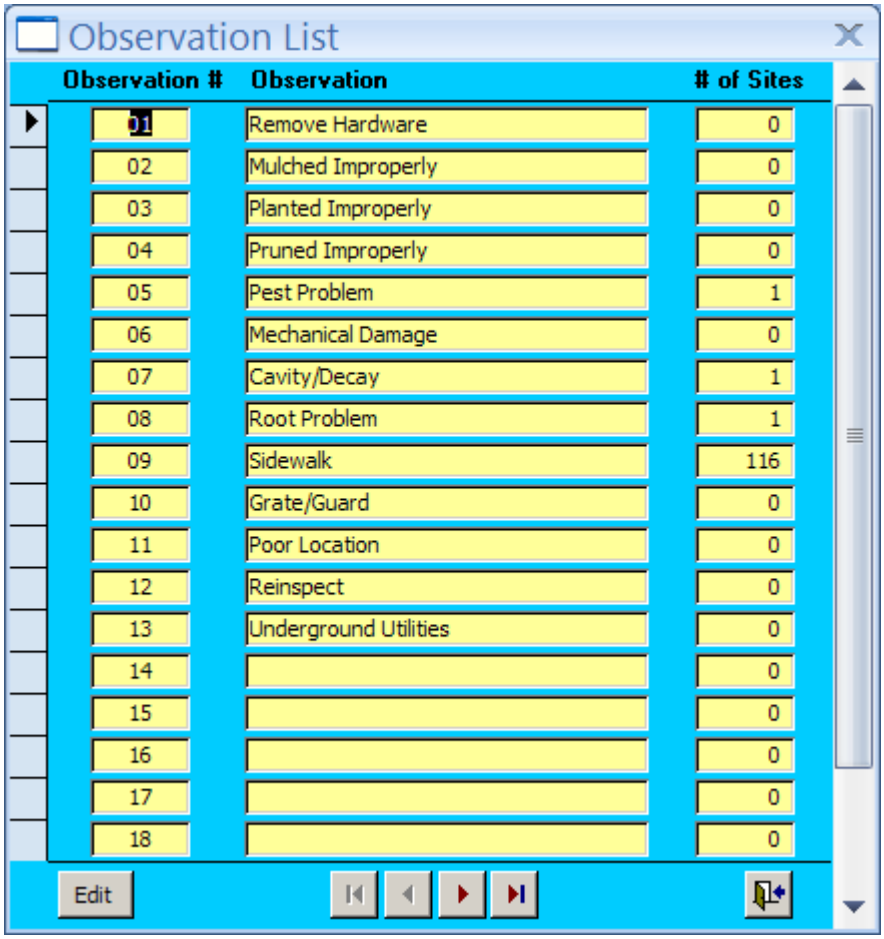
When adding or editing data in the Staff List, all you will need to provide is the initials of the staff member.

This screen also shows usage counts for the number of sites entered by, received by and inspected by each staff member. You cannot delete a staff member unless all three counts are zero.

5.3q Observations Lookup Table

The Observations Lookup Table is used to maintain a list of individual observations about a tree or site.

The Observations Lookup Table corresponds to the Observations area of the Trees / Planting Sites section of the Site Form. When you click on the "Observations" button on the Lookup Tables menu, this screen appears:



This lookup table is handled a bit differently than the others. When you look at the Observations section of the Site Form, you will notice that the full list of observations already appears. There is no drop-down box to access them. You can also select multiple observations for each tree/site on the Site Form.

On the Observation List, there is space for 20 observations, and you cannot add more than that. You can only edit the 20 observations. **NOTE**: You can rename, but not remove, an observation description if it has already been selected for any site or tree on the Site Form.

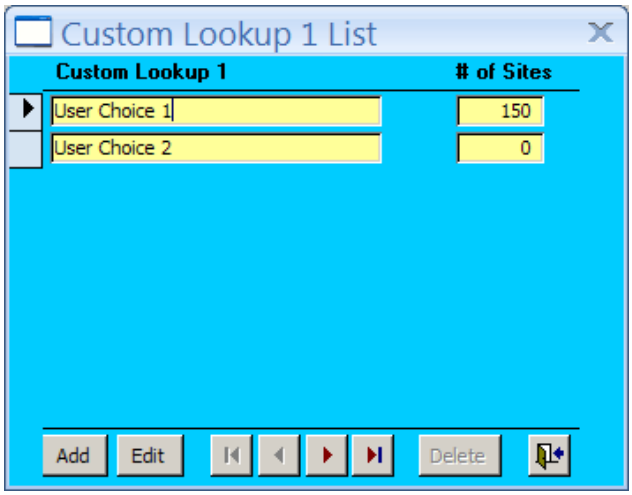
Of course, you may not need all 20 observations, and that's no problem; the Site Form will display only the observations you maintain on the Observation List. If the description of an observation is left blank (such as observations 14-20 in the above sample screen), it is considered inactive and will not appear on the Site Form.

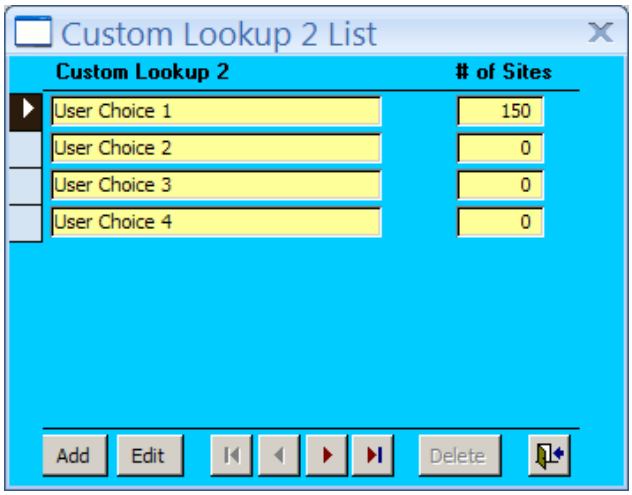
You can also see the number of sites that have been entered using each observation from this screen.

5.3r Custom Lookup 1 Lookup Table
and
5.3s Custom Lookup 2 Lookup Table

These two custom lookup tables are basically wildcards for you. You can choose the title for each lookup table and create whatever type of list you want for them. They will appear under your title in the Custom Attributes section area of the Trees / Planting Sites of the Site Form and on the Lookup Table menu when they are enabled on the system options screen (go to section 7.5c: Custom Fields in the system options section to learn more about how to enable and title custom lookups). They will not appear if they have not been enabled.

When you click on either the "Custom Lookup 1" or "Custom Lookup 2" buttons on the Lookup Tables menu, one of these two screens will appear:



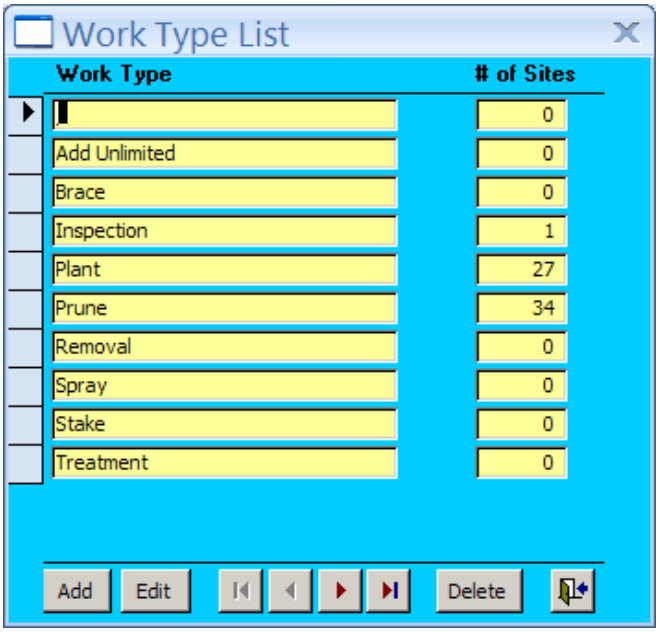


At this point you can add to, edit or delete from these lists. These screens will also show the number of sites that have been entered on the Site Form using each custom item from your list.

5.3t Work Types Lookup Table

The Work Types Lookup Table is used to maintain a list of types of work that **has been completed**. This is different from the Maintenance Type List, which maintains a list of work *to be done*, and the Requests Types List, which maintains a list of work a caller *requests to be done*.

The Work Types Lookup Table corresponds to the “Type of Work” field in the Work Histories section of the Site Form. When you click on the "Work Types" button on the Lookup Tables menu, this screen appears:



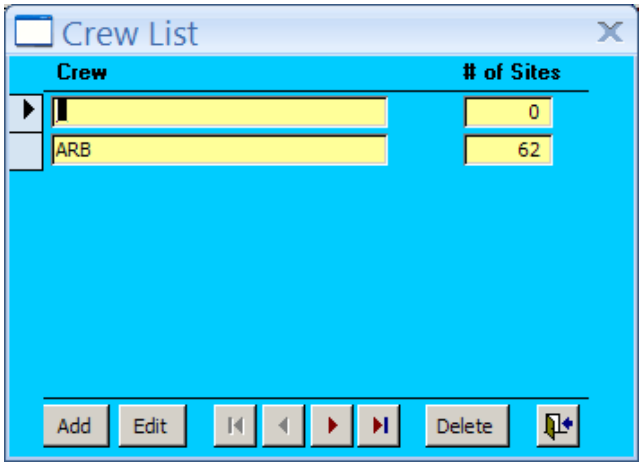
When adding or editing in the Work Type List, all you will need to provide is the description of the type of work to be done.

You can also see the number of work histories that have been entered using each work type from this screen.

5.3u Crew Codes Lookup Table

The Crew Codes Lookup Table is used to maintain a list of crews who perform the work.

The Crew Codes Lookup Table corresponds to the “Crew” field in the Work Histories section of the Site Form. When you click on the "Crew Codes" button on the Lookup Tables menu, this screen appears:



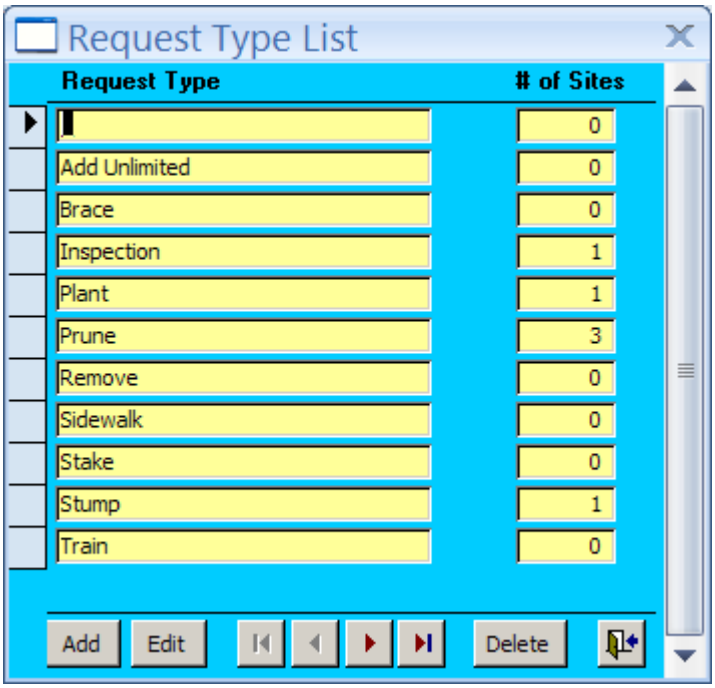
When adding or editing in the Crew List, all you will need to provide is the name or initials of the crew.

You can also see the number of work histories that have been entered using each crew code from this screen.

5.3v Request Types Lookup Table

The Request Types Lookup Table is used when residents call in to request inspections or work to be done. This list is similar to the Work Types List, but because you may want different values for each list, they are separate from each other.

The Request Types Lookup Table corresponds to the “Request” field in the Service Requests section of the Site Form. When you click on the "Request Types" button on the Lookup Tables menu, this screen appears:



When adding or editing in the Request Types List, all you will need to provide is the description of the type of request.

You can also see the number of service requests that have been entered using each request type from this screen.

6. Reports

By now, you know that Tree Tracker keeps a lot of data about every tree/site, work history and service request in your municipality. That's great, but of little help unless you can mine that data to help you manage your urban forest. This is where Tree Tracker's Report Generator comes in.

You want to know how may Red Maples are in your city? Want to know how many trees on a particular street have wires near them? Need to know what percentage of your trees are in poor condition? You can easily get the answer to your questions with Tree Tracker's Report Generator.

As we'll discuss in this section, Tree Tracker comes with a number of standardized reports that give you the most common information that most municipalities use. Beyond that, the Report Generator allows you to easily change the settings on these reports to give you EXACTLY the information you need. The Report Generator also allows you to filter in and out specific items to tailor a report to your needs. You can even export Tree Tracker data to a Microsoft Excel spreadsheet.

NOTE

PLAY WITH IT!

We encourage you to experiment with the Report Generator! Although this User Guide will step you through running reports, there's no substitute for actually doing it.

Experiment with running the same report sorted in a different order. Try adding filters and see what the report ends up looking like. You'll get a print preview of your report after you run it and if you don't like what you ended up with, just close the print preview and try again!

6a Running Reports: Six Quick Steps

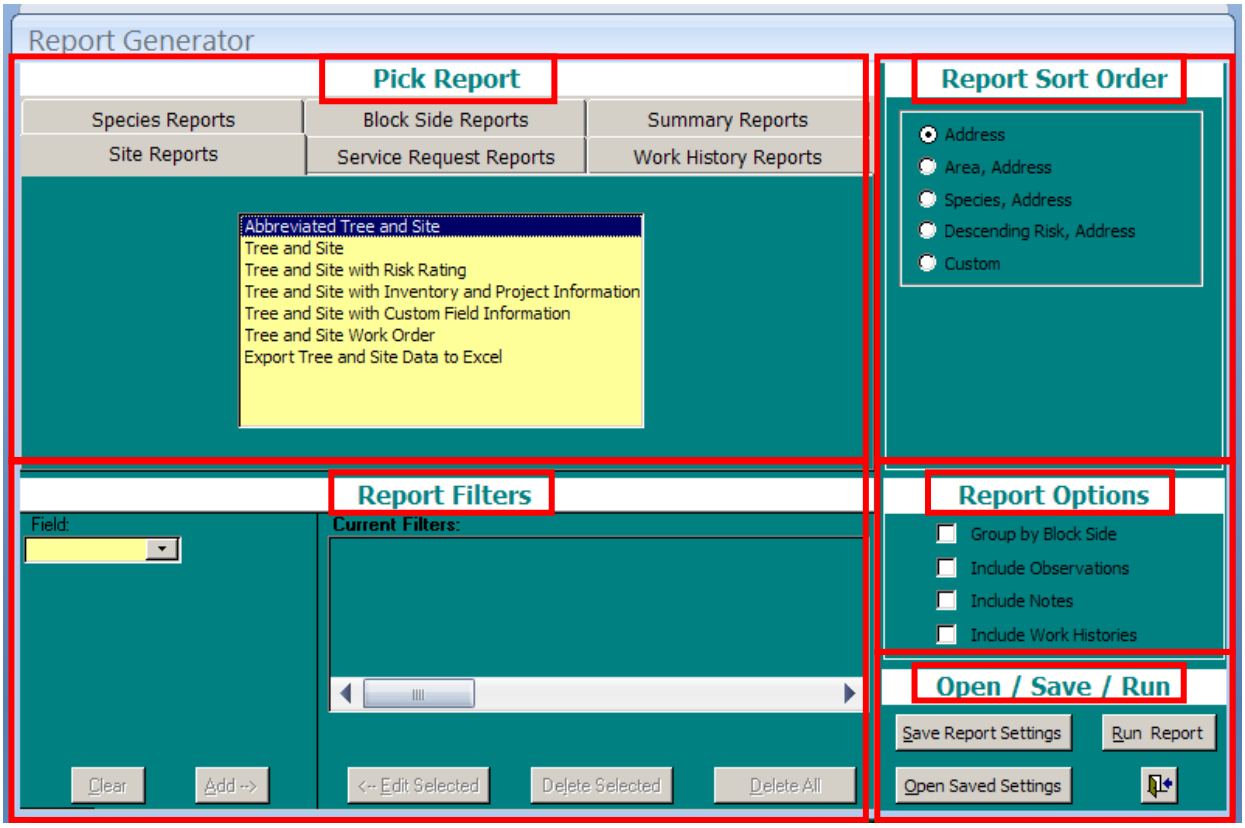
We'll get into much more detail about running reports later, but here are six quick steps to running a report:

1. Choose the report group from one of the six tabs at the top of the Pick Report section.
2. Choose the report from the list in the Pick Report section.
3. Choose the report sort order, or create a custom sort order in the Report Sort Order section.[3]
4. Create filters (if needed) for the report in the Report Filters section.
5. Choose additional report options (if any) in the Report Options section.
6. Click "Run Report" in the Open / Save / Run section.

[3] For Summary Reports, choose the report grouping from the Report Grouping section.

6.1 The Report Generator Screen

To generate reports, it's important to be familiar with the sections of the Report Generator screen. First, let's take a look at the Report Generator screen and its five sections and then we'll go over each of these sections:



6.1a Pick Report Section

In this section you can choose Tree Tracker's common pre-set reports. There are six tabs at the top of this section, each corresponding to a group of reports. The six groupings are:

- Site Reports
- Service Request Reports
- Work History Reports
- Species Reports
- Block Side Reports
- Summary Reports

First choose the tab for the group of report you want to run, and then choose the specific report. We'll take a more detailed look at each group's reports in section 6.2: Standard Reports, and section 6.3: Summary Reports.

6.1b Report Filters Section

In this section you will be able to create filters in order to include or exclude specific data. Say you want to run a report on all of the trees/sites in your municipality, but only want to see those trees/sites that are managed by the city, not managed privately or by both. Or you want a report about work histories for a certain area. You create filters to tailor your report to get exactly what you need. We'll go through how to create filters in detail in section 6.4: Creating Filters.

6.1c Report Sort Order Section

The Report Sort Order section allows you to choose how you would like your report sorted. In this section, you will see the four most common ways the selected group of reports is usually sorted.

The options are different for each report group. For example, it makes sense that you'd want to sort service requests by date, but not trees/sites. You won't see sorting by date as one of the four common options if you choose a report in the Site Report group, but you will in the Service Request group.

As an example, let's say that you want to run a standard Tree and Site Report from the Site Reports group. In the Report Sort Order section, you've chosen to sort by "Address". When you run the report, it will look like this:

Tree and Site Listing

Filters: None

Address	Sd/#	Location	Area	Managed By	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Wires	Hdscape Damage	Root Space	Tree Value	Site ID
17934 Adams Dr	F2	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	34,326
17934 Adams Dr	F4	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	34,328
17934 Adams Dr	F5	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	34,329
17934 Adams Dr	F6	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	34,330
17934 Adams Dr	F7	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	34,331
17934 Adams Dr	F8	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	34,332
17934 Adams Dr	F9	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	34,337
17942 Adams Dr	F[illegible]	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	18,427

Report sorted by address in numerical and street name order

You'll notice that the report is sorted by address.

Now run the same report, but with "Species, Address" chosen in the Report Sort Order section. Here's what it will look like:

Tree and Site Listing

Filters: None

Address	Sd/#	Location	Area	Managed By	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Wires	Hdscape Damage	Root Space	Tree Value	Site ID
19032 Seven Oaks Dr	S1	TreeLawn	Area 2	City	Ash, Green	Immediate-Remove	Poor-Poor	12	No	No	12	$745.68	27,571
On: Willow Wood Dr | From: Saratoga Tr | To: Seven Oaks Dr					Sd: Odd								
19032 Seven Oaks Dr	S2	TreeLawn	Area 2	City	Ash, Green	Immediate-Remove	Poor-Poor	6	No	No	12	$302.18	27,572
On: Willow Wood Dr | From: Saratoga Tr | To: Seven Oaks Dr					Sd: Odd								
19037 Seven Oaks Dr	S1	TreeLawn	Area 2	City	Ash, Green	Routine-Thin	Fair-Fair	12	No	No	12	$1,242.80	27,583
On: Willow Wood Dr | From: Seven Oaks Dr | To: Misty Lake D					| Sd: Odd								
19037 Seven Oaks Dr	S2	TreeLawn	Area 2	City	Ash, Green	Routine-Thin	Fair-Fair	12	No	No	12	$1,242.80	27,584
On: Willow Wood Dr | From: Seven Oaks Dr | To: Misty Lake D					| Sd: Odd								
19253 Stony Point Dr	F1	TreeLawn	Area 2	City	Ash, Green	Young-Train	Poor-Poor	3	No	No	12	$191.30	26,786
14305 Bennington Dr	F1	TreeLawn	Area 2	City	Crabapple	Routine-Thin	Fair-Fair	12	No	No	12	$1,193.52	28,803
14320 Bennington Dr	F1	TreeLawn	Area 2	City	Crabapple	Routine-Thin	Good-Good	12	No	No	12	$1,670.93	28,772
14352 Bennington Dr	F1	TreeLawn	Area 2	City	Crabapple	Young-Train	Fair-Fair	12	No	No	12	$1,193.52	28,773
14384 Bennington Dr	F1	TreeLawn	Area 2	City	Crabapple	Young-Train	Fair-Fair	12	No	No	12	$1,193.52	28,774
14399 Bennington Dr	F2	TreeLawn	Area 2	City	Crabapple	Young-Train	Fair-Fair	6	No	No	12	$503.63	28,801

Within each species, sorted by address

Report sorted by species alphabetically first

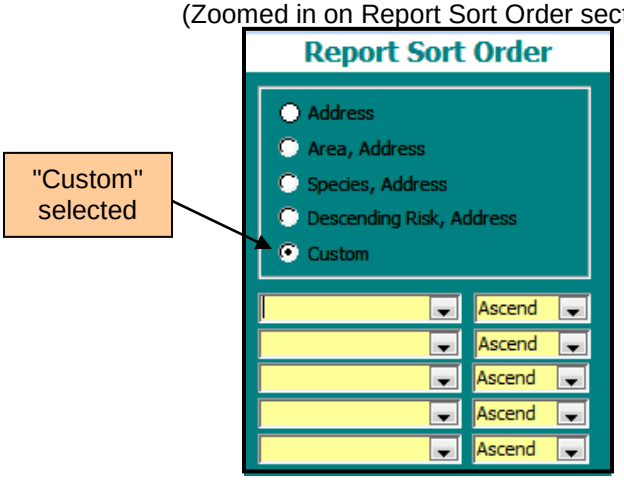
You'll notice that the columns are the same in both reports, and in the same order. But this time, the first level sorting is done by species alphabetically (or common name as the column header lists it). The second level sorting is by address, which means that within each species, the addresses are sorted. Remember that you selected "Species, Address" as the sort order, which means that the first level of sorting is species and the second level is address.

No matter what sort order you choose for a given report, the columns will stay the same and in the same order. What will change is which column the report is sorted by.

6.1d Custom Sort Order

Of course, you may want to sort some other way than the four common options listed. That's why the fifth option is "Custom". The custom option is available for all groups of reports (except summary reports, which we'll review in section 6.3b: Summary Report Options). If you choose "Custom", this box will appear:

(Zoomed in on Report Sort Order section)



Now you have the option to sort your report by any criteria you want, and choose if you want it sorted ascending or descending. You can sort by up to five levels. Click on the drop-down box from the first of the five custom levels and choose the field you want to sort by first. Choose a field on the second line to add a second level of sorting, etc.

6.1e Report Grouping Section (Summary Reports Only)

When you choose the Summary Reports group tab, you'll notice that the Report Sort Order section becomes the Report Grouping section. We'll discuss summary reports and the use of the Report Grouping section in detail in section 6.3a: Report Grouping Section.

6.1f Report Options Section

In the Pick Report section, two of the groups have additional options for their reports.

For the Site Reports group, you have the option to group each report by block sides so that you can see tree/site information broken down by each block. You can also opt to add observations, notes and work histories for each tree/site record to your report. We'll discuss the Site Reports group and what these reports look like with these options enabled in more detail in section 6.2b: Site Report Group Report Options.

For summary reports, you can choose to either sort your results by count total or alphabetically. We'll discuss summary reports in more detail in section 6.3b: Summary Report Options, where you can see examples of reports with the different options chosen.

The other four groups do not have additional options, and the Report Options section will be blank.

6.1g Open / Save / Run Section

There are four options in this section:

Save Report Settings

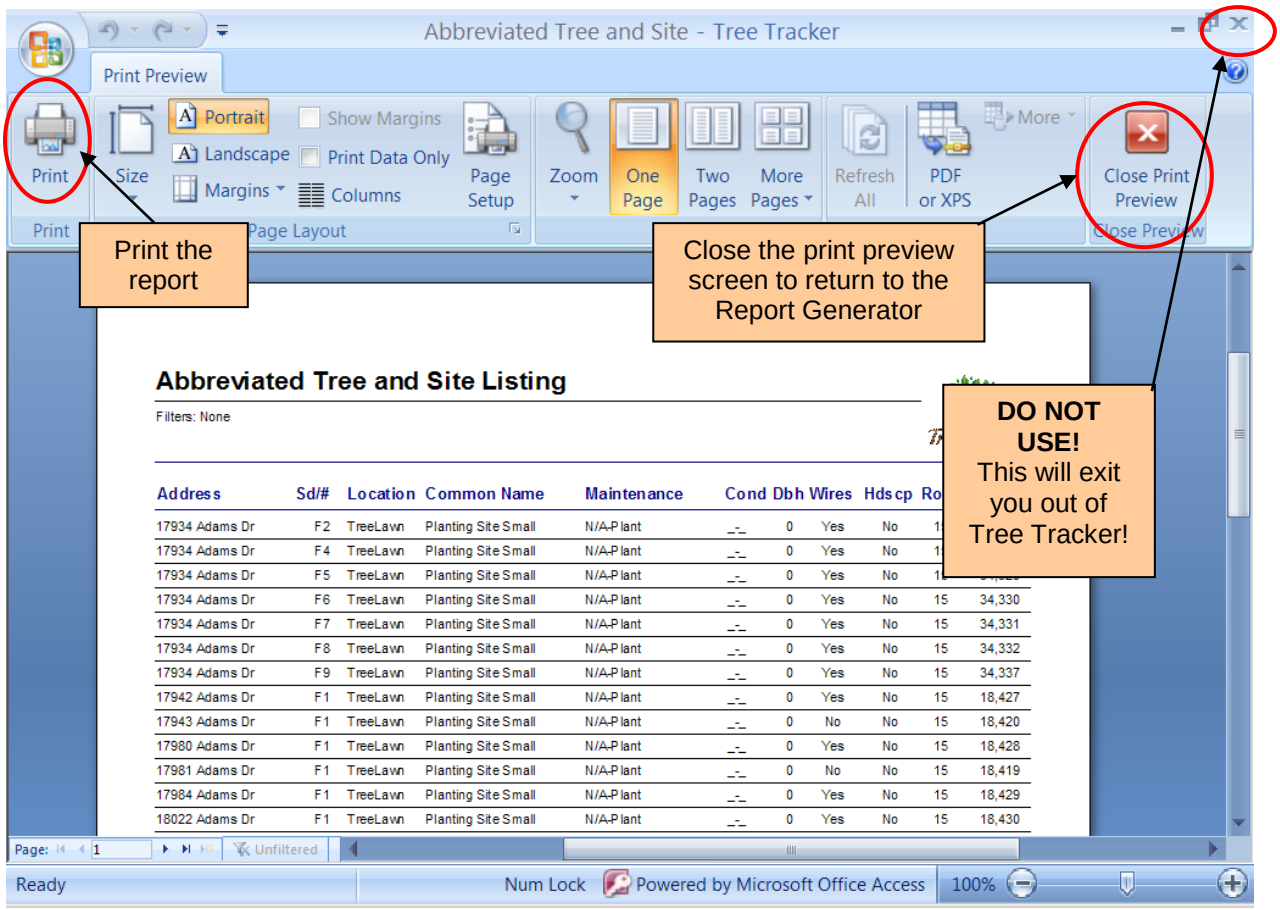
Once you have chosen the various options and filters for a report, you may want to save those settings for future use. We will discuss saving report settings in much more detail after we have talked about choosing sort orders, options and creating filters. Go to section 6.5: Saving and Opening Report Settings to learn more about saving report settings.

Open Saved Settings

Go to section 6.5: Saving and Opening Report Settings to learn more about opening saved report settings.

Run Report

When you have finished choosing what report to run and have selected your sort order, options and created filters (if wanted), click "Run Report" to generate your report. You will be taken to a print preview screen of your report. Your print preview screen may look a bit different from this example.



From this print preview screen, you can print the report out. If the report is not what you want, you can close the print preview screen and return to the Report Generator screen. Your report settings will still be there so you can make changes without starting over.

NOTE

If the edges of the reports seem to be cut off in the print preview screen, adjust the margins setting.

Go to Page Setup settings or click on the "Margins" button and try changing the left and right margins to 0.5 inches. This should resolve this issue.

This is the exit button. Click here to exit the Report Generator and return to Tree Tracker's main menu screen.

6.2 Standard Reports

Standard reports, also known as listings or listing reports, are designed to present the data collected in Tree Tracker in a clear, cohesive fashion. These reports compile all of the individual record data of trees/sites, service requests and/or work histories together to give you a listing of your municipality's urban forest.

Because of the breadth of data collected, Tree Tracker provides you with a number of pre-set reports to give you the most commonly needed information. These reports are broken down into five groupings; Site Reports, Service Request Reports, Work History Reports, Species Reports, and Block Side Reports. Each (along with summary reports, which will be discussed in section 6.3: Summary Reports) has its own tab in the Pick Report section of the screen generator.

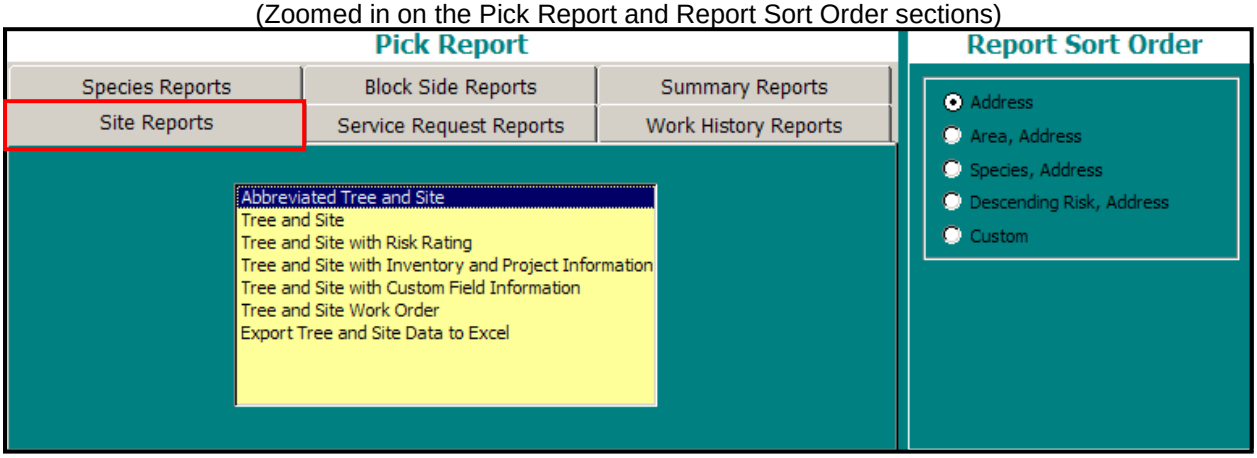
We'll discuss each group of reports and the individual reports within them. For each report, we'll describe its common usage and what's included in it.

IMPORTANT NOTE

Trees that have been marked as removed are not included in any reports except those in the Work History group, which show the work history and details of the removed tree.

6.2a Site Reports Group

(Zoomed in on the Pick Report and Report Sort Order sections)



The seven reports in the Site Reports group compile the data collected in the Trees / Planting Sites section of the Site Form, but also include data from other sections of the Site Form as needed.

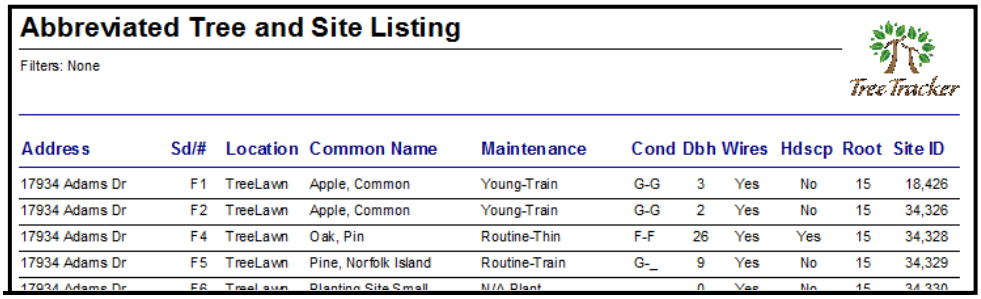
For all reports in the Site Reports group you have a choice of four of the most common sort orders or creating your own custom sort order. The four pre-set sort orders are:

- Sort by address (ascending)
- Sort by area first, then by address (ascending)
- Sort by species common name first, then by address (ascending)
- Sort by descending risk, then by address (ascending)

To learn more about sort orders and see examples of what the same report looks like with different sort orders, go to section 6.1c: Report Sort Order. To see how to create custom sort orders, go to section 6.1d: Custom Sort Order.

Abbreviated Tree and Site Listing

This report provides a quick snapshot of each tree/site record. Some of the data elements have been abbreviated to conserve space.



Abbreviated Tree and Site Listing

Filters: None

Address	Sd/#	Location	Common Name	Maintenance	Cond	Dbh	Wires	Hdscp	Root	Site ID
17934 Adams Dr	F1	TreeLawn	Apple, Common	Young-Train	G-G	3	Yes	No	15	18,426
17934 Adams Dr	F2	TreeLawn	Apple, Common	Young-Train	G-G	2	Yes	No	15	34,326
17934 Adams Dr	F4	TreeLawn	Oak, Pin	Routine-Thin	F-F	26	Yes	Yes	15	34,328
17934 Adams Dr	F5	TreeLawn	Pine, Norfolk Island	Routine-Train	G-_	9	Yes	No	15	34,329
17934 Adams Dr	F6	TreeLawn	Planting Site Small	N/A Plant		0	Yes	No	15	34,330

The fields (columns) included in this report are:

Field	Description
Address	Address number and street name
Sd/#	Abbreviated code for side of lot, followed by tree number
Location	Location of tree/site
Common Name	Common species name of tree or planting site
Maintenance	Maintenance priority followed by maintenance type
Cond	Abbreviated code for the condition of wood followed by abbreviated code for the condition of leaves
Dbh	Diameter of the tree (in inches)
Wires	Wires present?
Hdscp	Hardscape damage present?
Root	Narrowest root restriction (in feet)
Site ID	Automatically generated unique identifier for each tree/site

Tree and Site Listing

This report provides a more comprehensive snapshot of each tree/site record. It contains the same information as the Abbreviated Tree and Site Listing, but adds management area, managed by and tree value. Also, the condition field is no longer abbreviated.

Tree and Site Listing

Filters: None

Address	Sd/#	Location	Area	Managed By	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Wires	Hdscape Damage	Root Space	Tree Value	Site ID
17934 Adams Dr	F1	TreeLawn	Area 3	City	Apple, Common	Young-Train	Good-Good	3	Yes	No	15	$399.45	18,426
17934 Adams Dr	F2	TreeLawn	Area 3	City	Apple, Common	Young-Train	Good-Good	2	Yes	No	15	$375.50	34,326
17934 Adams Dr	F4	TreeLawn	Area 3	City	Oak, Pin	Routine-Thin	Fair-Fair	26	Yes	Yes	15	$3,443.93	34,328
17934 Adams Dr	F5	TreeLawn	Area 3	City	Pine, Norfolk Island	Routine-Train	Good-N/A	9	Yes	No	15	$415.32	34,329
17934 Adams Dr	F6	TreeLawn	Area 3	City	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	No	15	$0.00	34,330

The fields (columns) included in this report are:

Field	Description
Address	Address number and street name
Sd/#	Abbreviated code for side of lot, followed by tree number
Location	Location of tree/site
Area	Management area
Managed By	Management entity of tree/site
Common Name	Common species name of tree or planting site
Maintenance	Maintenance priority followed by maintenance type
Condition Wood-Lvs	Condition of wood followed by condition of leaves
Dbh	Diameter of the tree (in inches)
Wires	Wires present?
Hdscape Damage	Hardscape damage present?

Root Space	Narrowest root restriction (in feet)
Tree Value	Tree value automatically calculated
Site ID	Automatically generated unique identifier for each tree/site

Tree and Site Listing with Risk Rating

This report focuses on the risk a tree/site poses. It contains basic information about each tree/site, but also includes the tree's risk rating along with those fields that make up the tree's risk rating. To see more about how the risk rating is calculated, see section 4.6l: What Is the Risk Rating?

Tree and Site Listing with Risk Rating

Filters: None

Tree Tracker

Address	Sd/#	Location	Area	Land Use	Managed By	Common Name	Maintenance	Failure Size	Condition Wood-Lvs	Dbh	Wires	Risk*	Site ID
17934 Adams Dr	F1	TreeLawn	Area 3	Residential	City	Apple, Common	Young-Train	00 to 03	Good-Good	3	Yes	7	18,426
17934 Adams Dr	F2	TreeLawn	Area 3	Residential	City	Apple, Common	Young-Train	N/A	Good-Good	2	Yes	6	34,326
17934 Adams Dr	F4	TreeLawn	Area 3	Residential	City	Oak, Pin	Routine-Thin	04 to 12	Fair-Fair	26	Yes	10	34,328
17934 Adams Dr	F5	TreeLawn	Area 3	Residential	City	Pine, Norfolk Island	Routine-Train	04 to 12	Good-N/A	9	Yes	9	34,329
17934 Adams Dr	F6	TreeLawn	Area 3	Residential	City	Planting Site Small	N/A-Plant	N/A	N/A-N/A	0	Yes	0	34,330

The fields (columns) included in this report are:

Field	Description
Address	Address number and street name
Sd/#	Abbreviated code for side of lot, followed by tree number
Location	Location of tree/site
Area	Management area
Land Use	Type of land use where the tree/site is located
Managed By	Management entity of tree/site
Common Name	Common species name of tree or planting site
Maintenance	Maintenance priority followed by maintenance type
Failure Size	Diameter (in inches) of the largest section of a tree that is likely to fail
Condition Wood-Lvs	Condition of wood followed by condition of leaves
Dbh	Diameter of the tree (in inches)
Wires	Wires present?
Risk*	Risk rating calculated by Tree Tracker
Site ID	Automatically generated unique identifier for each tree/site

*The scale for the risk rating appears in the footer of each page of this report.

Tree and Site Listing with Inventory and Project Information

This report focuses on the management of projects and inventories in your municipality. This report is helpful, for example, if you want to see all trees/sites that fall under a specific project, or see when an area of your municipality was last inventoried.

Tree and Site Listing with Inventory and Project Information

Filters: None

Address	Sd/#	Location	Area	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Wires	Project	Inventory Date	Inventory By	Site ID
17934 Adams Dr	F1	TreeLawn	Area 3	Apple, Common	Young-Train	Good-Good	3	Yes	Fall 2009 Planting	12/23/2003	ARB	18,426
17934 Adams Dr	F2	TreeLawn	Area 3	Apple, Common	Young-Train	Good-Good	2	Yes	Fall 2009 Planting	12/23/2003	ARB	34,326
17934 Adams Dr	F4	TreeLawn	Area 3	Oak, Pin	Routine-Thin	Fair-Fair	26	Yes	Fall 2009 Planting	12/23/2003	ARB	34,328
17934 Adams Dr	F5	TreeLawn	Area 3	Pine, Norfolk Island	Routine-Train	Good-N/A	9	Yes	Fall 2009 Planting	12/23/2003	ARB	34,329
17934 Adams Dr	F6	TreeLawn	Area 3	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	Fall 2009 Planting	12/23/2003	ARB	34,330
17934 Adams Dr	F7	TreeLawn	Area 3	Cottonwood, Eastern	Immediate-Remove	Dead/Dying-Poor	28	Yes	Fall 2009 Planting	12/23/2003	ARB	34,331

The fields (columns) included in this report are:

Field	Description
Address	Address number and street name
Sd/#	Abbreviated code for side of lot, followed by tree number
Location	Location of tree/site
Area	Management area
Common Name	Common species name of tree or planting site
Maintenance	Maintenance priority followed by maintenance type
Condition Wood-Lvs	Condition of wood followed by condition of leaves
Dbh	Diameter of the tree (in inches)
Wires	Wires present?
Project	Name of project associated with tree/site
Inventory By / Date	Date of inventory of tree/site, followed by initials of staff member who performed the inventory
Site ID	Automatically generated unique identifier for each tree/site

Tree and Site Listing with Custom Field Information

This report focuses on custom fields that you have enabled and labeled. It contains the basic information about each tree/site, and includes the up-to four user defined custom fields.

Each of the four available custom fields only appears on this report if you have enabled it. To see more about enabling custom fields, see section 7.5c: Custom Fields, or section 8.3d: Custom Attribute Fields.

Tree and Site Listing with Custom Field Information

Filters: None

Address	Sd/#	Location	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Wires	Custom Lookup 1	Custom Lookup 2	Custom Text 1	Custom Text 2	Site ID
17934 Adams Dr	F1	TreeLawn	Apple, Common	Young-Train	Good-Good	3	Yes	N/A	N/A	Sample Text		18,426
17934 Adams Dr	F2	TreeLawn	Apple, Common	Young-Train	Good-Good	2	Yes	N/A	N/A			34,326
17934 Adams Dr	F4	TreeLawn	Oak, Pin	Routine-Thin	Fair-Fair	26	Yes	N/A	N/A		Custom text sample	34,328
17934 Adams Dr	F5	TreeLawn	Pine, Norfolk Island	Routine-Train	Good-N/A	9	Yes	N/A	N/A			34,329
17934 Adams Dr	F6	TreeLawn	Planting Site Small	N/A-Plant	N/A-N/A	0	Yes	N/A	N/A			34,330

The fields (columns) included in this report are:

Field	Description
Address	Address number and street name
Sd/#	Abbreviated code for side of lot, followed by tree number
Location	Location of tree/site
Common Name	Common species name of tree or planting site
Maintenance	Maintenance priority followed by maintenance type
Condition Wood-Lvs	Condition of wood followed by condition of leaves
Dbh	Diameter of the tree (in inches)
Wires	Wires present?
Custom Lookup 1*	User defined field name and data from custom lookup table 1 (appears only if enabled)
Custom Lookup 2*	User defined field name and data from custom lookup table 2 (appears only if enabled)
Custom Text 1*	User defined field name and text (appears only if enabled)
Custom Text 2*	User defined field name and text (appears only if enabled)
Site ID	Automatically generated unique identifier for each tree/site

* The names of these fields are user-defined and will be different if you have renamed them.

Tree and Site Listing with Work Order

This report focuses on providing space for work history information to be filled in by a crew as work is being done. This report is useful, for example, when a crew is out working on a number of trees in an area, such as pruning all of the trees on a street or block, or doing a mass planting. If work is being done only on a specific tree, you will want to use the Service Request Work Order report, which will be discussed in the next section.

Tree and Site Listing with Work Order

Filters: None

Tree Tracker

Address	Sd/#	Location	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Wires	Site ID	Type of Work	Date of Work	Crew Leader	Man Hours	Costs
17934 Adams Dr	F1	TreeLawn	Apple, Common	Young-Train	Good-Good	3	Yes	18,426	{_____}	{__/__/__}	{____}	{____}	{___}
17934 Adams Dr	F2	TreeLawn	Apple, Common	Young-Train	Good-Good	2	Yes	34,326	{_____}	{__/__/__}	{____}	{____}	{___}
17934 Adams Dr	F4	TreeLawn	Oak, Pin	Routine-Thin	Fair-Fair	26	Yes	34,328	{_____}	{__/__/__}	{____}	{____}	{___}

The fields (columns) included in this report are:

Field	Description
Address	Address number and street name
Sd/#	Abbreviated code for side of lot, followed by tree number
Location	Location of tree/site
Common Name	Common species name of tree or planting site
Maintenance	Maintenance priority followed by maintenance type
Condition Wood-Lvs	Condition of wood followed by condition of leaves
Dbh	Diameter of the tree (in inches)
Wires	Wires present?
Site ID	Automatically generated unique identifier for each tree/site
Type of Work	Write in type of work being performed
Date of Work	Write in date work is being performed
Crew Leader	Write in initials of the crew who performed the work
Man Hours	Write in number of man hours it took to complete work
Costs	Write in cost of work performed

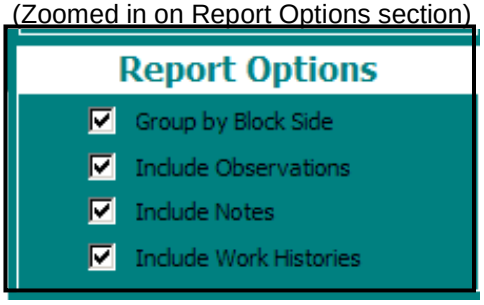
Export Tree and Site Data to Excel

We will discuss exporting reports to Excel in section 6.2g: Exporting Reports to Excel.

6.2b Site Report Group Report Options

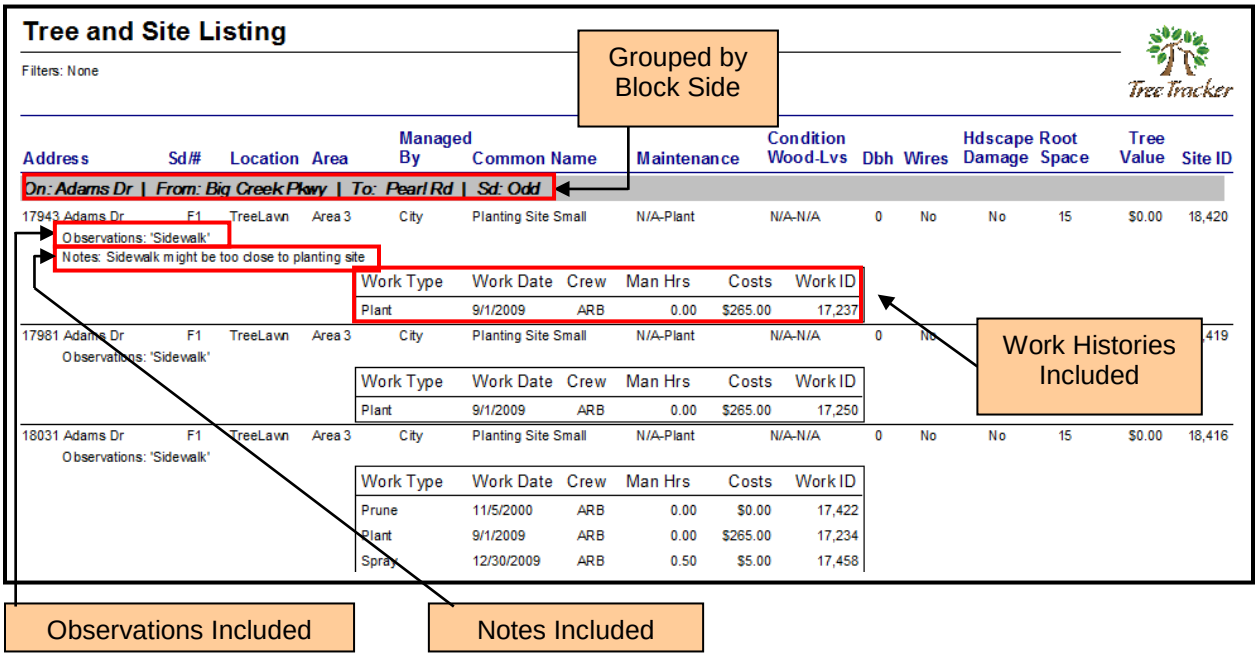
When you click on the "Site Reports" tab in the Pick Report section of the Report Generator, you'll see that four report options appear:

(Zoomed in on Report Options section)

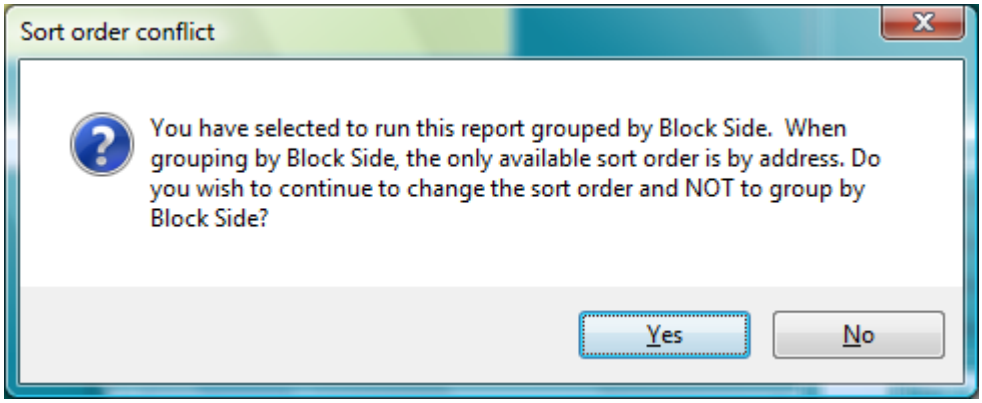


For the Site Reports group only, you have the option to group each report by block sides so that you can see tree/site information broken down by each block. You can also opt to add observations, notes and work histories for each tree/site record to your report.

In this example of a Tree and Site Listing, when you run the report with all four options selected, it will look like this:

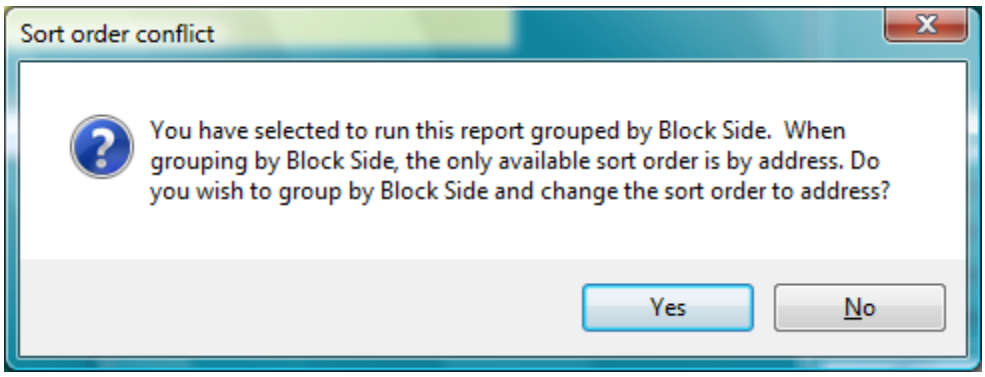


For the “Group by Block Side” option only:
When you select the “Group by Block Side” option, the only available sort order is by address. You cannot choose to sort by any other method, custom or otherwise. If you try to choose another sort order, this message will appear:



Click "Yes" to abandon grouping the report by block side and proceed with sorting by another method other than address. Click "No" to keep the sorting method by address and group the report by block side.

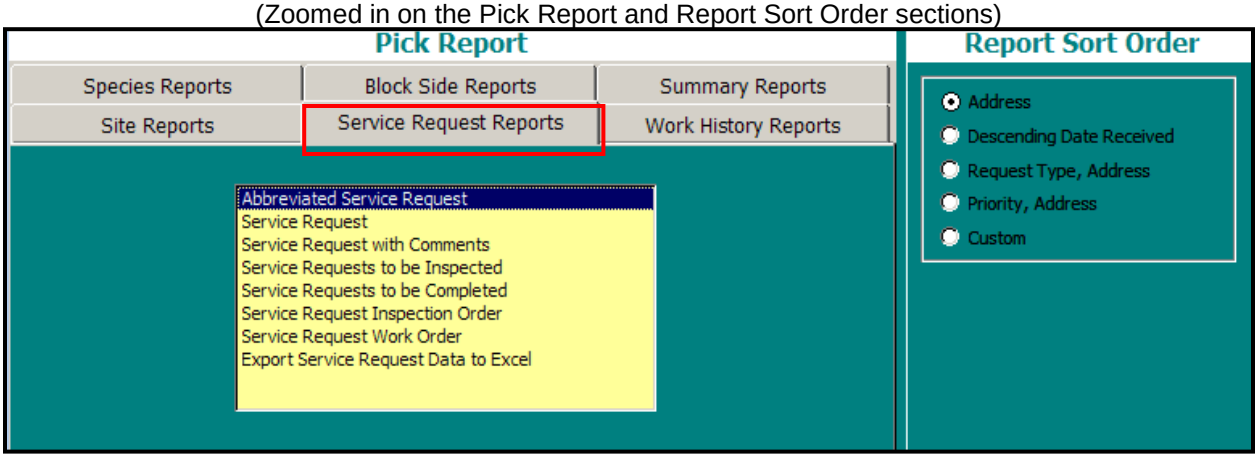
If you have chosen a sort order other than address, then try to add the ‘Group By Block Side” option, you'll get this message:



Click "Yes" to change the sort order to address and group the report by block side, or click "No" to keep the sort order have chosen and abandon trying to group by block side.

6.2c Service Request Reports Group

(Zoomed in on the Pick Report and Report Sort Order sections)



The eight reports in the Service Requests Reports group compile the data collected in the Service Requests section of the Site Form.

For all reports in the Service Requests group you have a choice of four of the most common sort orders or creating your own custom sort order. The four pre-set sort orders are:

- Sort by address (ascending)
- Sort by descending date received
- Sort by request type first, then by address (ascending)
- Sort by priority first, then by address (ascending)

To learn more about sort orders and see examples of what the same report looks like with different sort orders, go to section 6.1c: Report Sort Order. To see how to create custom sort orders, go to section 6.1d: Custom Sort Order.

Abbreviated Service Request

This report provides a quick snapshot of each service request record.

Abbreviated Service Request Listing

Filters: None

Address	Street	Caller	Request Type	Pri	Date Received	Date Inspected	Date Resolved	Age	Request ID
17934	Adams Dr	Ken Selvonk	Stump	1	12/11/09	12/22/09	01/15/10	35 days	54
17934	Adams Dr	Ken Selvonk	Remove	1	05/29/09			244 days	53
17934	Adams Dr	Ken Selvonk	Plant	1	06/03/09	06/19/09	07/03/09	30 days	47
17985	Adams Dr	Mrs. Perri	Inspection	1	04/05/09			298 days	48

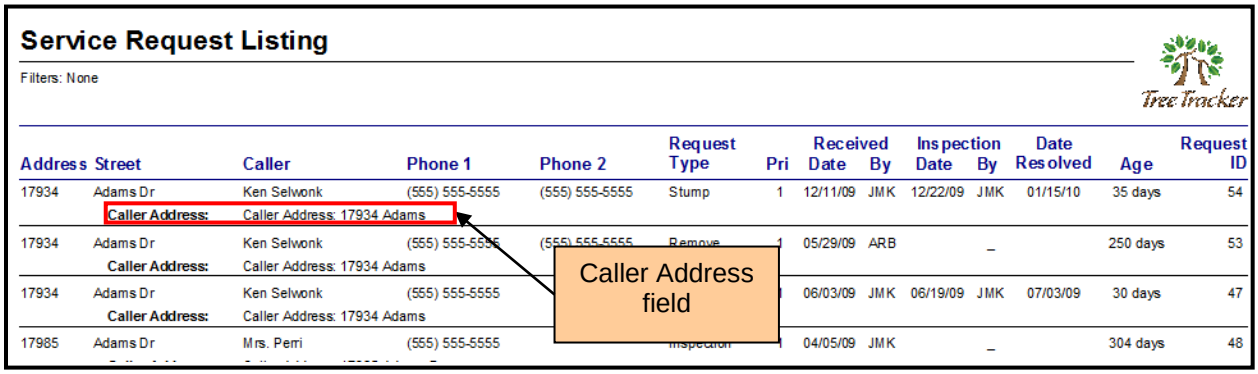
The fields (columns) included in this report are:

Field	Description
Address	Address number
Street	Street name
Caller	Name of caller requesting service request

Request Type	Type of service caller is requesting
Pri	Priority of service request
Date Received	Date service request received
Date Inspected	Date inspection completed
Date Resolved	Date service request resolved
Age	Number of days between date service request received and resolved, or number of days open if not yet resolved
Request ID	Automatically generated unique identifier for each service request

Service Request

This report provides a more comprehensive snapshot of each service request record. It contains the same information as the Abbreviated Service Request Listing, but adds all of the fields associated with service requests, with the exception of caller and inspector comments.



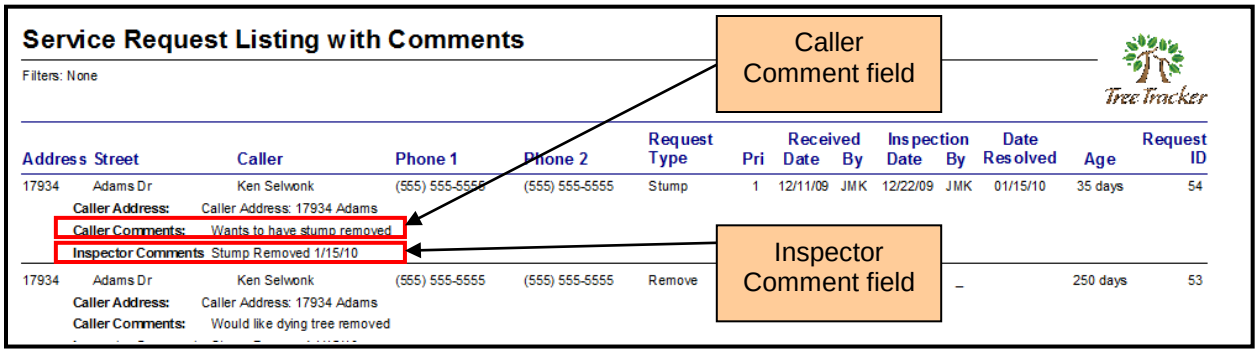
The fields (columns) included in this report are:

Field	Description
Address	Address number
Street	Street name
Caller	Name of caller requesting service request
Caller Address*	Caller address associated with the service request
Phone 1	Caller phone number
Phone 2	Caller phone number
Request Type	Type of service caller is requesting
Pri	Priority of service request
Received Date / By	Date service request received, followed by initials of staff member who took the request
Inspection Date / By	Date of service request inspection, followed by initials of staff member who performed the inspection
Date Resolved	Date service request resolved
Age	Number of days between date service request received and resolved, or number of days open if not yet resolved
Request ID	Automatically generated unique identifier for each service request

* The caller address field is not a column, but instead a line added under each service request record.

Service Request Listing with Comments

This report is identical to the Service Request Listing report, but now the caller and inspector comments have been added under each service request record. This report includes all fields associated with service requests.



The fields (columns) included in this report are:

Field	Description
Address	Address number
Street	Street name
Caller	Name of caller requesting service request
Caller Address*	Caller address associated with the service request
Phone 1	Caller phone number
Phone 2	Caller phone number
Request Type	Type of service caller is requesting
Pri	Priority of service request
Received Date / By	Date service request received, followed by initials of staff member who took the request
Inspection Date / By	Date of service request inspection, followed by initials of staff member who performed the inspection
Date Resolved	Date service request resolved
Age	Number of days between date service request received and resolved, or number of days open if not yet resolved
Request ID	Automatically generated unique identifier for each service request
Caller Comments*	Text of caller comments associated with that service request
Inspector Comments*	Text of inspector comments associated with that service request

* These fields are not in columns, but instead are added under each service request record.

Service Requests to be Inspected

This report is used to generate a list of all open service requests needing to be inspected. As you look at this report, you'll notice that there is a built-in filter that cannot be removed (we'll discuss report filters in much more detail in section 6.4: Report Filters).

When you run this report, Tree Tracker searches all service requests to find any that have no inspection date and no resolution date.

Service Requests to be Inspected

Filters:
•Date Inspected is blank and Date Resolved is blank

Address	Street	Caller	Caller Address	Phone 1	Phone 2	Request Type	Pri	Received Date	Received By	Age	Request ID
17934	Adams Dr	Ken Selwonk	17934 Adams	(555) 555-5555	(555) 555-5555	Remove	1	05/29/09	ARB	244 days	53
17985	Adams Dr	Mrs. Perri	17985 Adams Dr	(555) 555-5555		Inspection	1	04/05/09	JMK	298 days	48

Total Service Requests on this report: 2

The fields (columns) included in this report are:

Field	Description
Address	Address number
Street	Street name
Caller	Name of caller requesting service request
Caller Address	Caller address associated with the service request
Phone 1	Caller phone number
Phone 2	Caller phone number
Request Type	Type of service caller is requesting
Pri	Priority of service request
Received Date / By	Date service request received, followed by initials of staff member who took the request
Age	Number of days service has been open
Request ID	Automatically generated unique identifier for each service request

Service Requests to be Completed

This report is used to generate a list of all open service requests needing to be completed by a work crew. As you look at this report, you'll notice that there is a built-in filter that cannot be removed (we'll discuss report filters in much more detail in section 6.4: Report Filters).

When you run this report, Tree Tracker searches all service requests to find any that have an inspection date but no resolution date.

Service Requests to be Completed

Filters:
•Date Inspected is not blank and Date Resolved is blank

Address	Street	Caller	Caller Address	Phone 1	Phone 2	Request Type	Pri	Received Date	Received By	Inspection Date	Inspection By	Age	Request ID
14367	Bennington Dr	Traci	14367 Bennington Dr	(555) 555-5555	(123) 555-1212	Stump	1	06/04/09	JMK	06/04/09	JMK	238 days	49
14480	Bennington Dr	Keri Hove	Same	(555) 555-5555		Prune	1	12/04/08	BFA	12/19/08	JMK	420 days	50
14757	Bennington Dr	Garrett Martinez	same	(555) 555-5555		Prune	1	03/15/09	ARB	03/15/09	JMK	319 days	51

Total Service Requests on this report: 3

The fields (columns) included in this report are:

Field	Description
Address	Address number
Street	Street name
Caller	Name of caller requesting service request
Caller Address	Caller address associated with the service request
Phone 1	Caller phone number
Phone 2	Caller phone number
Request Type	Type of service caller is requesting
Pri	Priority of service request
Received Date / By	Date service request received, followed by initials of staff member who took the request
Inspection Date / By	Date of service request inspection, followed by initials of staff member who performed the inspection
Age	Number of days service has been open
Request ID	Automatically generated unique identifier for each service request

Service Request Inspection Order

This report is very similar to the Service Requests to be Inspected report. The major difference is that **each** open service request will be on its own page (or more than one page depending on the record), and include additional information about other service requests and trees/sites at the address.

This report is meant to be used by an inspector when performing inspections in the field. With this report, he/she has comprehensive information about other service requests and trees/sites at the address. The inspector then fills in the Inspection Details section of the report.

NOTE

This is the same report as the one that runs when you print a service request directly from the Site Form.

The only difference is that the report that runs from the Site Form prints out the report for the selected service request only. The report that runs from the Report Generator prints out service request inspection orders for ANY open service requests awaiting inspection, each on its own page.

Service Request Inspection Order

Tree Tracker

Request Details

Address: 17934 Adams Dr **Received On:** 05/29/09 **Priority:** 1 **Request ID:** 53

Request Type: Remove **Received By:** ARB

Caller Details

Caller Name: Ken Selwonk **Caller Address:** 17934 Adams **Phone 1:** (555) 555-5555 **Phone 2:** (555) 555-5555

Caller Comments: Would like dying tree removed

Inspection Details

Inspection Date: {__/__/__} **By:** {_____}

Inspector Comments:

Other Requests at this Address

Caller	Caller Address	Phone 1	Phone 2	Req. Type	Pri	Date Rcv'd	By	Date Inspected	By	Date Resolved	Request ID
Ken Selwonk	17934 Adams	(555) 555-5555	(555) 555-5555	Stump	1	12/11/09	JMK	12/22/09	JMK	01/15/10	54
Ken Selwonk	17934 Adams	(555) 555-5555		Plant	1	06/03/09	JMK	06/19/09	JMK	07/03/09	47

Trees and Sites at this Address

Sd/#	Location	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Failure Size	Wires	Hdscp Dmg.	Site ID	Type of Work	Date of Work	Crew Leader	Man Hours	Costs
F1	TreeLawn	Apple, Common	Young-Train	Good-Good	3	00 to 03	Yes	No	18,426	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F2	TreeLawn	Apple, Common	Young-Train	Good-Good	2	N/A	Yes	No	34,326	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F4	TreeLawn	Oak, Pin	Routine-Thin	Fair-Fair	26	04 to 12	Yes	Yes	34,328	{_____}	{__/__/__}	{____}	{____}	{___}
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F5	TreeLawn	Pine, Norfolk Island	Routine-Train	Good-N/A	9	04 to 12	Yes	No	34,329	{_____}	{__/__/__}	{____}	{____}	{___}
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														

Demo *Tuesday, March 02, 2010* *Page 1 of 2*

Service Request Work Order

This report is very similar to the Service Requests to be Completed report. The major difference is that **each** open service request will be on its own page (or more than one page depending on the record), and include additional information about other service requests and the trees/sites at this address.

This report is meant to be used by a work crew when performing work in the field. With this report, the crew has comprehensive information about other service requests and trees/sites at the address. The work crew then fills in the information about the work performed on the appropriate line for that tree/site.

NOTE

This is the same report as the one that runs when you print a service request directly from the Site Form.

The only difference is that the report that runs from the Site Form prints out the report for the selected service request only. The report that runs from the Report Generator prints out work orders for ANY open service requests that have been inspected but are awaiting completion, each on its own page.

Service Request Work Order

Tree Tracker

Request Details

Address: 17934 Adams Dr | Received On: 06/03/09 | Priority: 1 | Request ID: 47

Request Type: Plant | Received By: JMK

Caller Details

Caller Name: Ken Selwonk | Caller Address: 17934 Adams | Phone 1: (555) 555-5555 | Phone 2:

Caller Comments: Wants to know when street trees will be planted

Inspection Details

Inspection Date: 06/19/09 | By: JMK

Inspector Comments: Street tree planting is scheduled for Fall 2009

Other Requests at this Address

Caller	Caller Address	Phone 1	Phone 2	Req. Type	Pri	Date Rcv'd	By	Date Inspected	By	Date Resolved	Request ID
Ken Selwonk	17934 Adams	(555) 555-5555	(555) 555-5555	Stump	1	12/11/09	JMK	12/22/09	JMK	01/15/10	54
Ken Selwonk	17934 Adams	(555) 555-5555	(555) 555-5555	Remove	1	05/29/09	ARB		_		53

Trees and Sites at this Address

Sd/#	Location	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Failure Size	Wires	Hdscp Dmg.	Site ID	Type of Work	Date of Work	Crew Leader	Man Hours	Costs
F1	TreeLawn	Apple, Common	Young-Train	Good-Good	3	00 to 03	Yes	No	18,426	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F2	TreeLawn	Apple, Common	Young-Train	Good-Good	2	N/A	Yes	No	34,326	{_____}	{__/__/__}	{____}	{____}	{___}
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F4	TreeLawn	Oak, Pin	Routine-Thin	Fair-Fair	26	04 to 12	Yes	Yes	34,328	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F5	TreeLawn	Pine, Norfolk Island	Routine-Train	Good-N/A	9	04 to 12	Yes	No	34,329	{ }	{ / / }	{ }	{ }	{ }
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														
F6	TreeLawn	Planting Site Small	N/A-Plant	N/A-N/A	0	N/A	Yes	No	34,330	{_____}	{__/__/__}	{____}	{____}	{___}
On: Adams Dr | From: Pearl Rd | To: Big Creek Pkwy | Sd: Even														

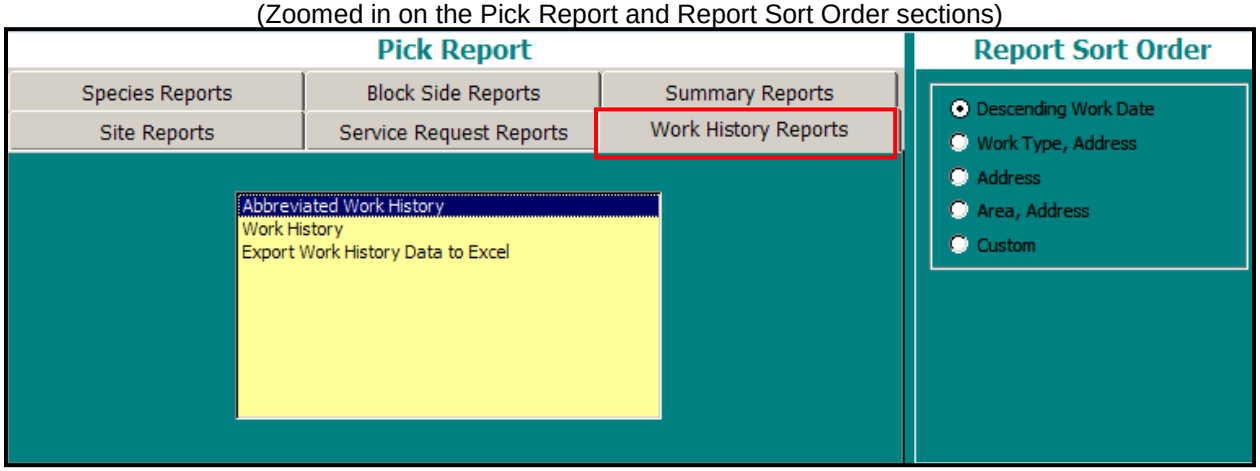
Demo *Tuesday, March 02, 2010* *Page 1 of 2*

Export Service Request Data to Excel

We will discuss exporting reports to Excel in section 6.2g: Exporting Reports to Excel.

6.2d Work History Reports Group

(Zoomed in on the Pick Report and Report Sort Order sections)



The three reports in the Work History Reports group compile the data collected in the Work History and Trees / Planting Sites section of the Site Form.

For all reports in the Work History Reports group you have a choice of four of the most common sort orders or creating your own custom sort order. The four pre-set sort orders are:

- Sort by descending work date
- Sort by work type first, then address (ascending)
- Sort by address (ascending)
- Sort by area first, then address (ascending)

To learn more about sort orders and see examples of what the same report looks like with different sort orders, go to section 6.1c: Report Sort Order. To see how to create custom sort orders, go to section 6.1d: Custom Sort Order.

Abbreviated Work History

This report provides a quick snapshot of each work history record. It includes all of the work history data for each record and some additional information on the tree/site.

Abbreviated Work History Listing

Filters: None

Work Type	Work Date	Crew	Hrs	Costs	Address	Sd/#	Common Name	Dbh	Site ID	Work ID
Inspection	2/10/2010	ARB	1.00	$25.00	17934 Adams Dr	F2	Apple, Common	2	34,326	17,492
Stake	2/6/2010	ARB	2.00	$50.00	18935 Laurell Cir	F1	Pear, Callery	12	26,747	17,493
Prune	2/4/2010	ARB	1.00	$10.00	14264 Bennington Dr	F1	Planting Site Large	0	28,770	17,459
Prune	2/4/2010	ARB	1.00	$10.00	14296 Bennington Dr	F1	Planting Site Large	0	28,771	17,460

The fields (columns) included in this report are:

Field	Description
Work Type	Type of work that was performed
Work Date	Date work was performed
Crew	Initials of crew leader
Hrs	Number of hours it took to complete work
Costs	Cost of performing the work
Address	Address number and street name
Sd/#	Abbreviated code for side of lot, followed by tree number
Common Name	Common species name of tree or planting site
Dbh	Diameter of the tree (in inches)
Site ID	Automatically generated unique identifier for each tree/site
Work ID	Automatically generated unique identifier for each work history

Work History

This report provides a more comprehensive snapshot of each work history record. It contains the same information as the Abbreviated Service Request report, but adds much more information about the tree/site.

Work History Listing

Filters: None

Tree Tracker

Work Type	Work Date	Crew	Hrs	Costs	Address	Sd/#	Location	Common Name	Maintenance	Cond	Dbh	Wires	Site ID	Work ID
Inspection	2/10/2010	ARB	1.00	$25.00	17934 Adams Dr	F2	TreeLawn	Apple, Common	Young-Train	G-G	2	Yes	34,326	17,492
Stake	2/6/2010	ARB	2.00	$50.00	18935 Laurell Cir	F1	TreeLawn	Pear, Callery	Routine-Thin	G-G	12	No	26,747	17,493
Prune	2/4/2010	ARB	1.00	$10.00	14264 Bennington Dr	F1	TreeLawn	Planting Site Large	N/A-Plant	_-_	0	No	28,770	17,459
Prune	2/4/2010	ARB	1.00	$10.00	14296 Bennington Dr	F1	TreeLawn	Planting Site Large	N/A-Plant	_-_	0	No	28,771	17,460
Prune	2/4/2010	ARB	1.00	$10.00	14305 Bennington Dr	F1	TreeLawn	Crabapple	Routine-Thin	F-F	12	No	28,803	17,461

The fields (columns) included in this report are:

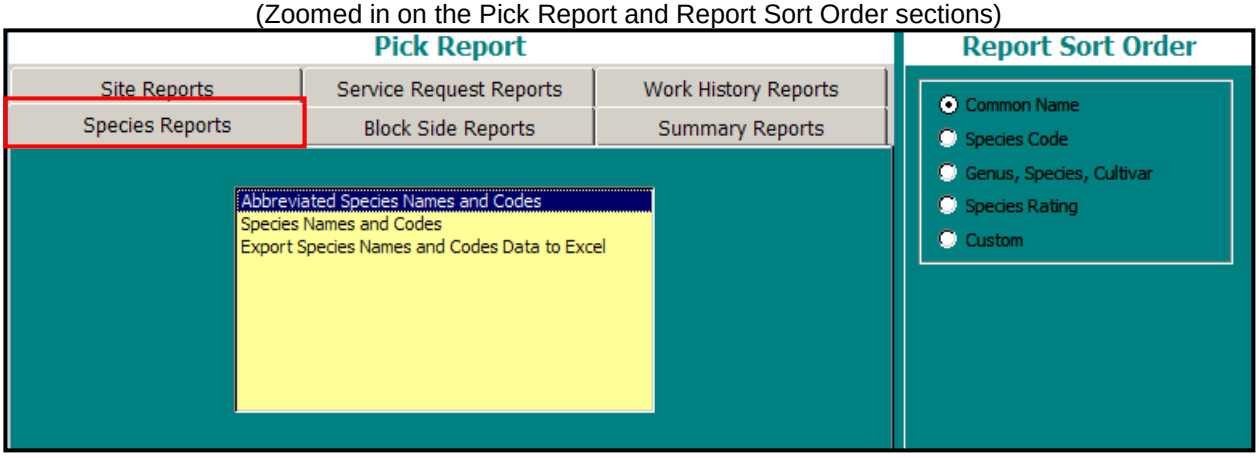
Field	Description
Work Type	Type of work that was performed
Work Date	Date work was performed
Crew	Initials of crew leader
Hrs	Number of hours it took to complete work
Costs	Cost of performing the work
Address	Address number and street name
Sd/#	Abbreviated code for side of lot, followed by tree number
Location	Location of tree/site
Common Name	Common species name of tree or planting site
Maintenance	Maintenance priority followed by maintenance type
Cond	Abbreviated code for the condition of wood followed by abbreviated code for the condition of leaves
Dbh	Diameter of the tree (in inches)
Wires	Wires present?

Site ID	Automatically generated unique identifier for each tree/site
Work ID	Automatically generated unique identifier for each work history

Export Work History Data to Excel
We will discuss exporting reports to Excel in section 6.2g: Exporting Reports to Excel.

6.2e Species Reports Group

(Zoomed in on the Pick Report and Report Sort Order sections)



The three reports in the Species Reports group compile the data from the Species Lookup Table. To learn more about data in the Species Lookup Table, go to section 5.3c: Species Lookup Table.

For all reports in the Species Reports group you have a choice of four of the most common sort orders or creating your own custom sort order. The four pre-set sort orders are:

- Sort by common name
- Sort by species code
- Sort by genus first, species second, and cultivar third
- Sort by species rating

To learn more about sort orders and see examples of what the same report looks like with different sort orders, go to section 6.1c: Report Sort Order. To see how to create custom sort orders, go to section 6.1d: Custom Sort Order.

Abbreviated Species Names and Codes
This report provides an abbreviated list of data compiled from the Species Lookup Table.

Abbreviated Species Names and Codes Listing

Filters: None

Code	Common Name	Family	Genus	Species	Cultivar	Rating
ACAU	Acacia, Earleaf		Acacia	auriculaeformis		60%
ACFA	Acacia, Sweet		Acacia	famesiana		70%
ALGL	Alder, European	Betulaceae	Alnus	glutinosa		65%
ALCO	Alder, Italian	Betulaceae	Alnus	cordata		70%
AL	Alder, Other	Betulaceae	Alnus	spp.		65%
PLOC	American Sycamore	Platanaceae	Platanus	occidentalis		70%

The fields (columns) included in this report are:

Field	Description
Code	Abbreviated species code
Common Name	Species common name
Family	Species family name
Genus	Species genus
Species	Species formal name
Cultivar	Species cultivar (if any)
Rating	Rating used in calculating tree value

Species Names and Codes

This report provides the complete list of data compiled from the Species Lookup Table.

Species Names and Codes Listing

Filters: None

Code	Common Name	Family	Genus	Species	Cultivar	Species Rating	Conifer/ Hardwood	Deciduous/ Evergreen	Mature Size	Prune Cycle
ACAU	Acacia, Earleaf		Acacia	auriculaeformis		60%	Hardwood	Deciduous	Small	0
ACFA	Acacia, Sweet		Acacia	farnesiana		70%	Hardwood	Deciduous	Small	0
ALGL	Alder, European	Betulaceae	Alnus	glutinosa		65%	Hardwood	Deciduous	Medium	0
ALCO	Alder, Italian	Betulaceae	Alnus	cordata		70%	Hardwood	Deciduous	Large	0
AL	Alder, Other	Betulaceae	Alnus	spp.		65%	Hardwood	Deciduous	Medium	0
PLOC	American Sycamore	Platanaceae	Platanus	occidentalis		70%	Hardwood	Deciduous	Large	0

The fields (columns) included in this report are:

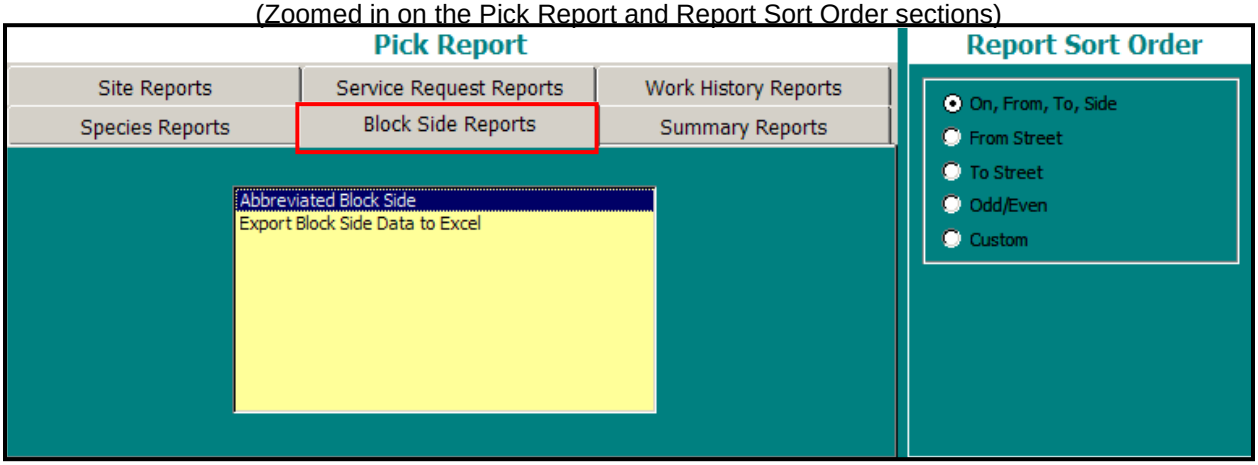
Field	Description
Code	Abbreviated species code
Common Name	Species common name
Family	Species family name
Genus	Species genus
Species	Species formal name
Cultivar	Species cultivar (if any)
Species Rating	Rating used in calculating the tree value
Conifer / Hardwood	Is tree a conifer, hardwood, palm or shrub
Deciduous / Evergreen	Is tree deciduous or evergreen
Mature Size	Growth size of mature tree (small, medium or large)
Prune Cycle	Number of months between pruning cycles

Export Species Names and Codes Data to Excel

We will discuss exporting reports to Excel in section 6.2g: Exporting Reports to Excel.

6.2f Block Side Reports Group

(Zoomed in on the Pick Report and Report Sort Order sections)



Both reports in the Block Side Reports group compile the data from the Block Sides Lookup Table. To learn more about data in the Block Sides Lookup Table, go to section 5.3b: Block Sides Lookup Table.

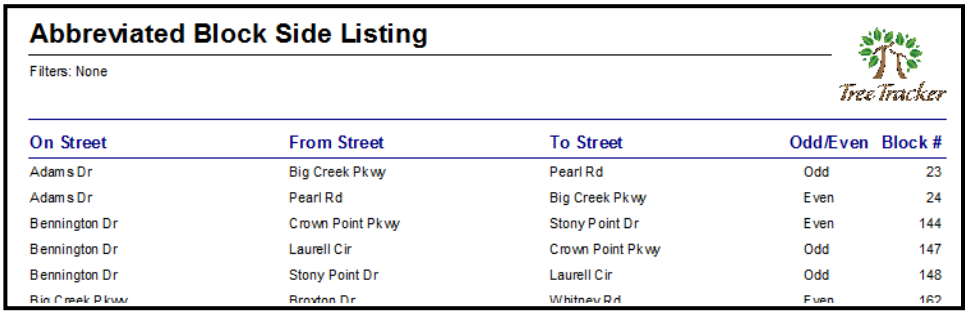
For the Abbreviated Block Side Report you have a choice of four of the most common sort orders or creating your own custom sort order. The four pre-set sort orders are:

- Sort by on street alphabetically (ascending) first, then from street alphabetically (ascending) second, then to street alphabetically (ascending) third, then side alphabetically (ascending) fourth
- Sort by from street alphabetically (ascending)
- Sort by to street alphabetically (ascending)
- Sort by odd/even side of street, then on-street alphabetically (ascending)

To learn more about sort orders and see examples of what the same report looks like with different sort orders, go to section 6.1c: Report Sort Order. To see how to create custom sort orders, go to section 6.1d: Custom Sort Order.

Abbreviated Block Side

This report provides complete list of data compiled from the Block Sides Lookup Table.



Abbreviated Block Side Listing

Filters: None

On Street	From Street	To Street	Odd/Even	Block #
Adams Dr	Big Creek Pkwy	Pearl Rd	Odd	23
Adams Dr	Pearl Rd	Big Creek Pkwy	Even	24
Bennington Dr	Crown Point Pkwy	Stony Point Dr	Even	144
Bennington Dr	Laurell Cir	Crown Point Pkwy	Odd	147
Bennington Dr	Stony Point Dr	Laurell Cir	Odd	148
Big Creek Pkwy	Broxton Dr	Whitney Rd	Even	162

The fields (columns) included in this report are:

Field	Description
On Street	Street address is on
From Street	Cross street before address
To Street	Cross street after address
Odd / Even	Address odd or even
Block #	Automatically generated unique identifier for each block side

Export Block Side Data to Excel
We will discuss exporting reports to Excel in section 6.2g: Exporting Reports to Excel.

6.2g Exporting Reports to Excel

Tree Tracker provides the capability to export **all** data from **every** report within a report group to Microsoft Excel at once. For example, if you export tree and site data from the Site Reports group, every field that appears in all six reports will export to Excel.

You can choose the sort order available to you in each report group (it's different for each group) before exporting to Excel. The data will then appear in Excel already sorted by the method you selected. You can also use filters. Data that has been filtered in will be exported, while data that has been filtered out will not.

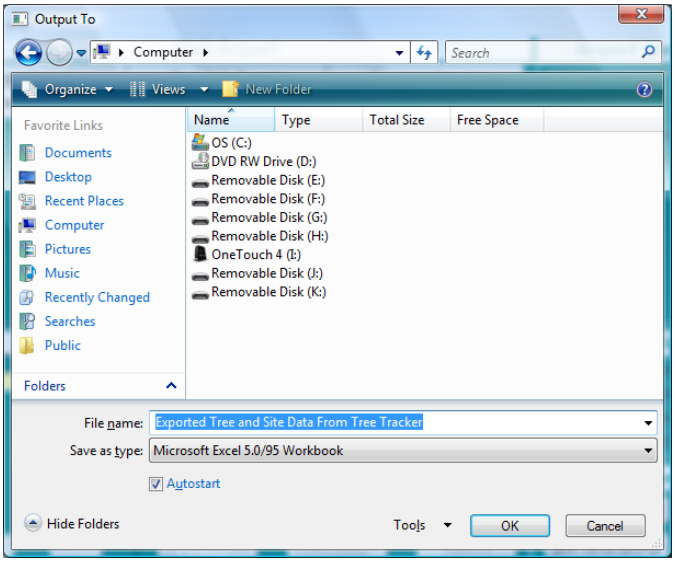
IMPORTANT NOTE

For the Site Reports Group:

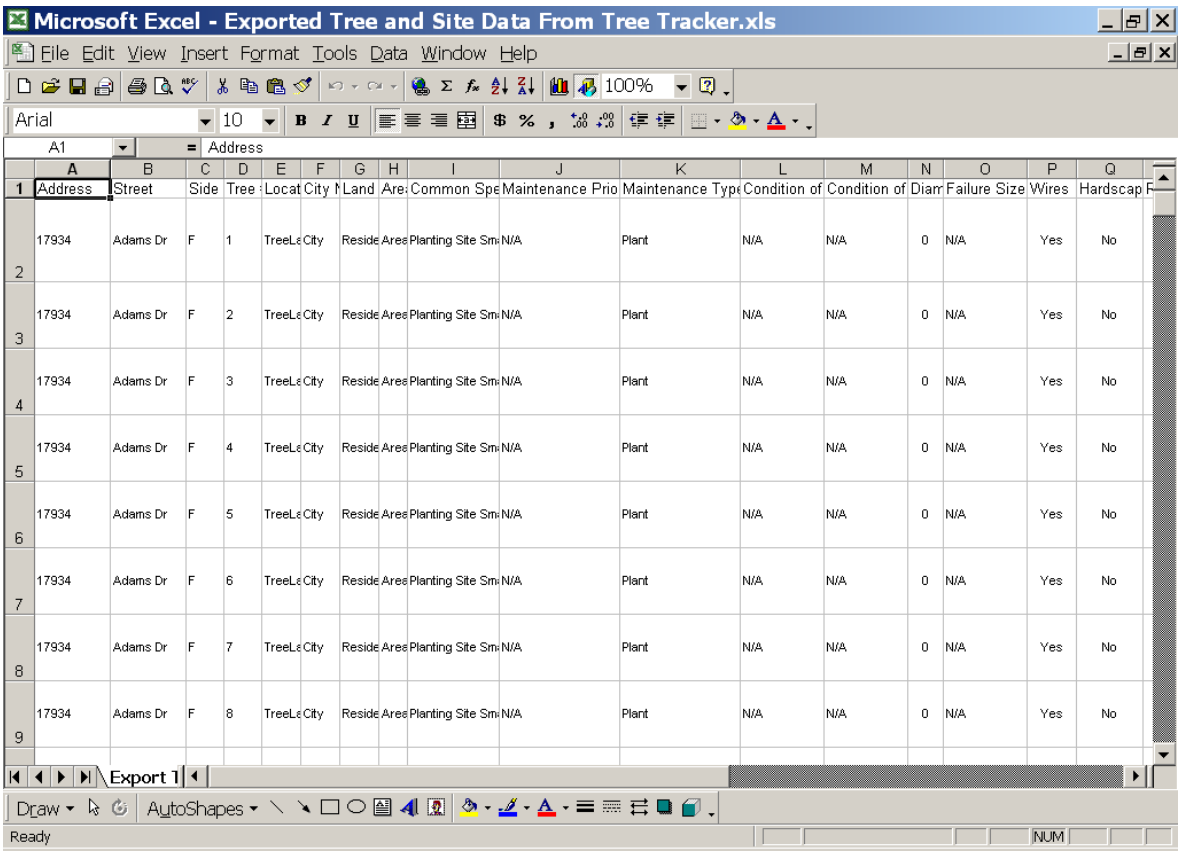
You cannot add the four report options when you export to Excel.

- Observations and notes already export to Excel automatically.
- You can also use Excel's sorting function to sort by block sides.
- Run the Export Work History to Excel report from the Work History Reports group in order to get that data exported to Excel.

When you run an Export to Excel report, this window will appear:



Choose the name of the Excel spreadsheet and the location where you want to save it. Once you click "OK", Excel will automatically open with the exported data displayed (It may look a bit different depending on what version of Excel and Windows you are running):

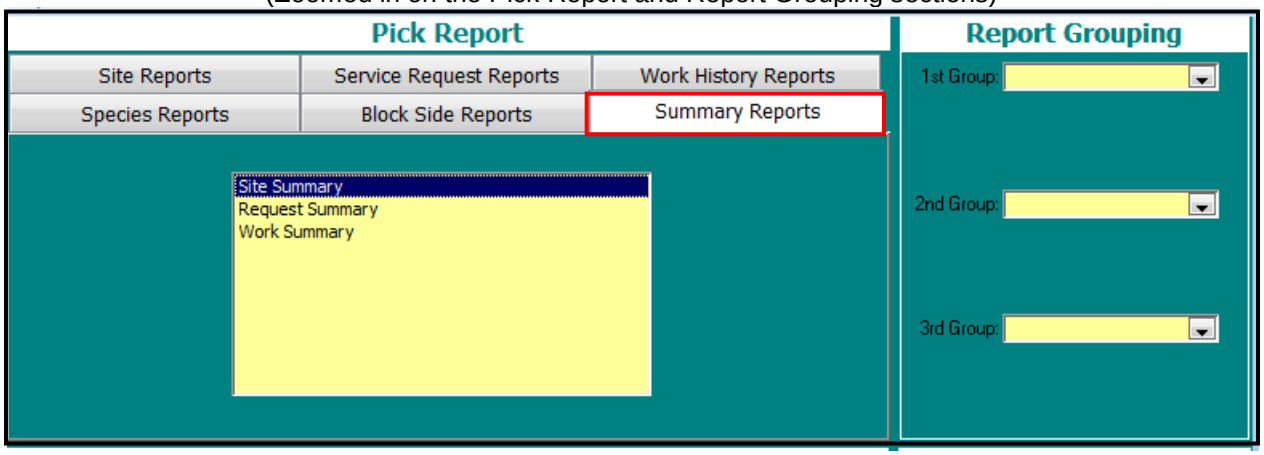


Address	Street	Side	Tree	Locat	City	Land	Are	Common Spe	Maintenance Prio	Maintenance Type	Condition of	Condition of	Diam	Failure Size	Wires	Hardscap
17934	Adams Dr	F	1	TreeLa	City	Reside	Area	Planting Site Sm	N/A	Plant	N/A	N/A	0	N/A	Yes	No
17934	Adams Dr	F	2	TreeLa	City	Reside	Area	Planting Site Sm	N/A	Plant	N/A	N/A	0	N/A	Yes	No
17934	Adams Dr	F	3	TreeLa	City	Reside	Area	Planting Site Sm	N/A	Plant	N/A	N/A	0	N/A	Yes	No
17934	Adams Dr	F	4	TreeLa	City	Reside	Area	Planting Site Sm	N/A	Plant	N/A	N/A	0	N/A	Yes	No
17934	Adams Dr	F	5	TreeLa	City	Reside	Area	Planting Site Sm	N/A	Plant	N/A	N/A	0	N/A	Yes	No
17934	Adams Dr	F	6	TreeLa	City	Reside	Area	Planting Site Sm	N/A	Plant	N/A	N/A	0	N/A	Yes	No
17934	Adams Dr	F	7	TreeLa	City	Reside	Area	Planting Site Sm	N/A	Plant	N/A	N/A	0	N/A	Yes	No
17934	Adams Dr	F	8	TreeLa	City	Reside	Area	Planting Site Sm	N/A	Plant	N/A	N/A	0	N/A	Yes	No

At this point you can use all of Excel's functionality to manipulate and display your data.

6.3 Summary Reports Group

(Zoomed in on the Pick Report and Report Grouping sections)



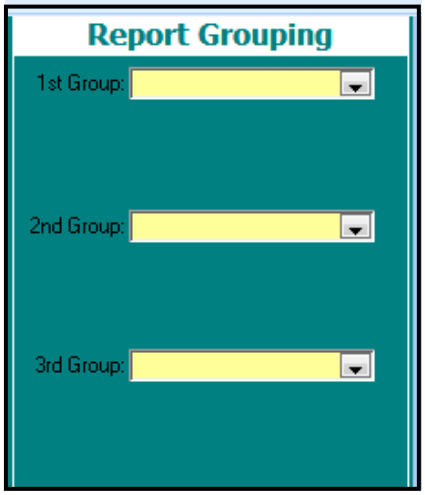
Regular reports provide a listing of records. Summary reports tell you *how many* records. Tree Tracker keeps count of how many times a data element has been used. You select the field you want to group by, run a summary report, and it will provide the count for that field.

Want to know how many Red Maples there are in your city? On a particular street? With wires near them? Need to know how many service requests were considered high priority last year? Last month? How about how many stump removals a work crew did last month? Summary reports provide the answers.

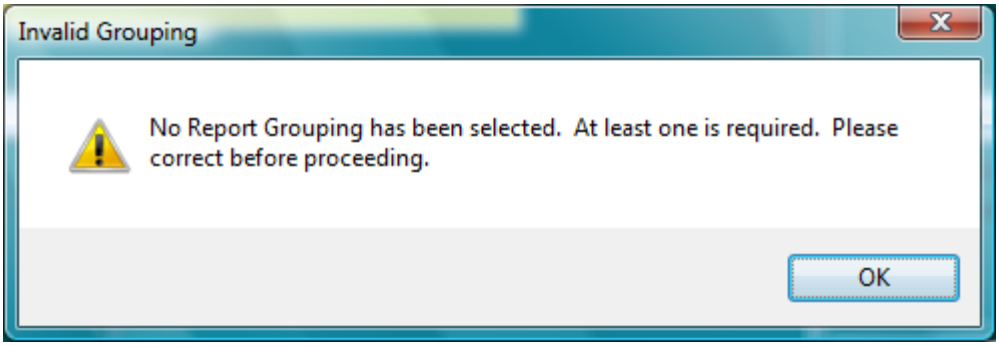
6.3a Report Grouping Section

Now what do we mean by grouping by field? That's what the Report Grouping section is all about.

(Zoomed in on Report Grouping section)



For each summary report, you can choose up to three fields to group by. We'll show you examples now to help explain what we mean by grouping by fields. If you try to run a summary report without choosing at least one grouping, you'll get this error message:

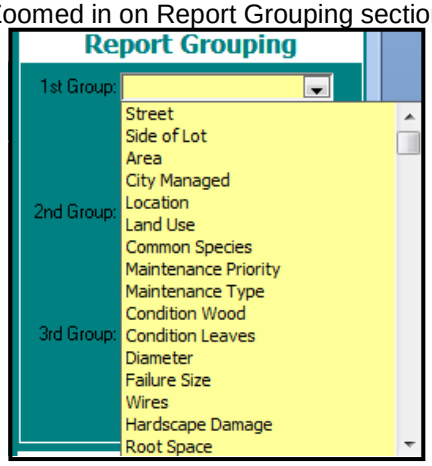


Example 1: One Group Summary Report

In this first example, let's run a simple one-group Site Summary report, where you are grouping by Area. You want to know how many trees/sites are in each area.

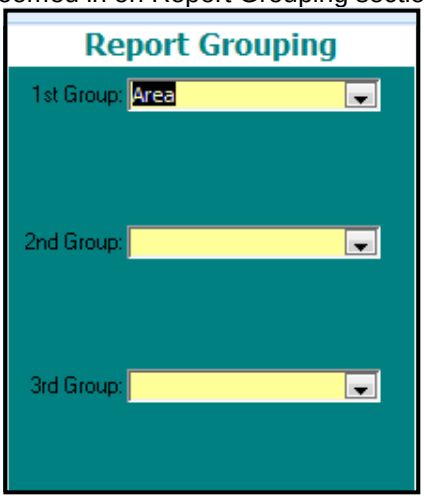
First, you go to the Report Grouping section and click on the drop-down arrow for the "1st Group" box. What you will see is a list of available fields that you can group by (you can also start typing in the first few letters of the field if you know it and the names of fields matching those letters will appear until the field you want appears).

(Zoomed in on Report Grouping section)

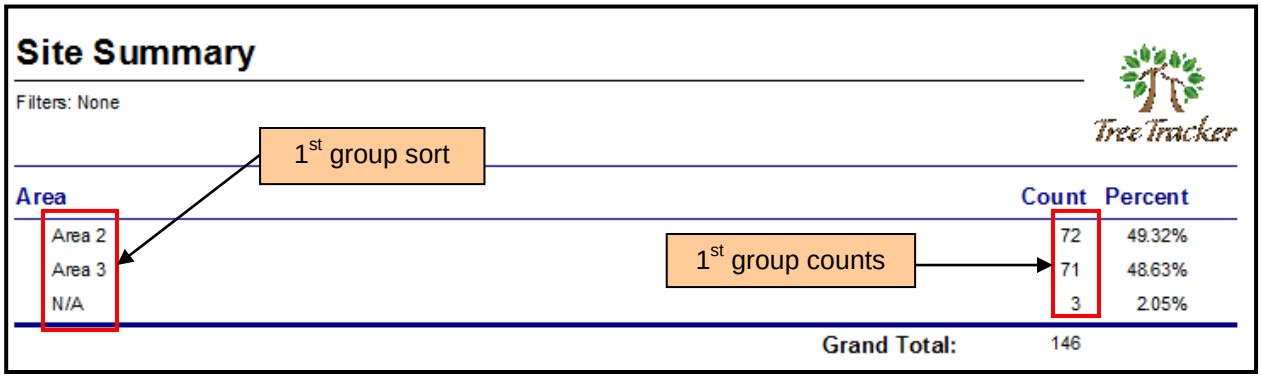


Because you want to know how many trees/sites are in each area, you want to group by Area.

(Zoomed in on Report Grouping section)



When you run the report, it looks like this:

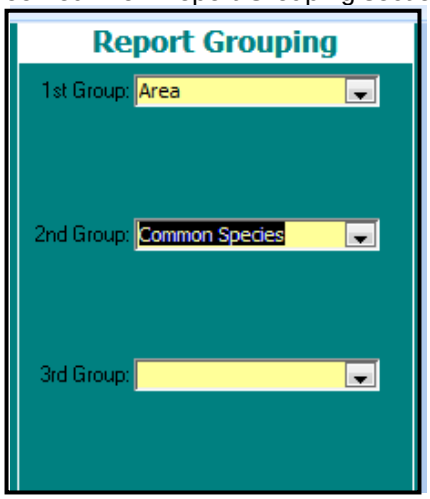


This report tells you, for example, that there are 72 trees/sites in area 2, 71 trees/sites in area 3 and three trees/sites with no area entered, for a grand total of 146 trees/sites.

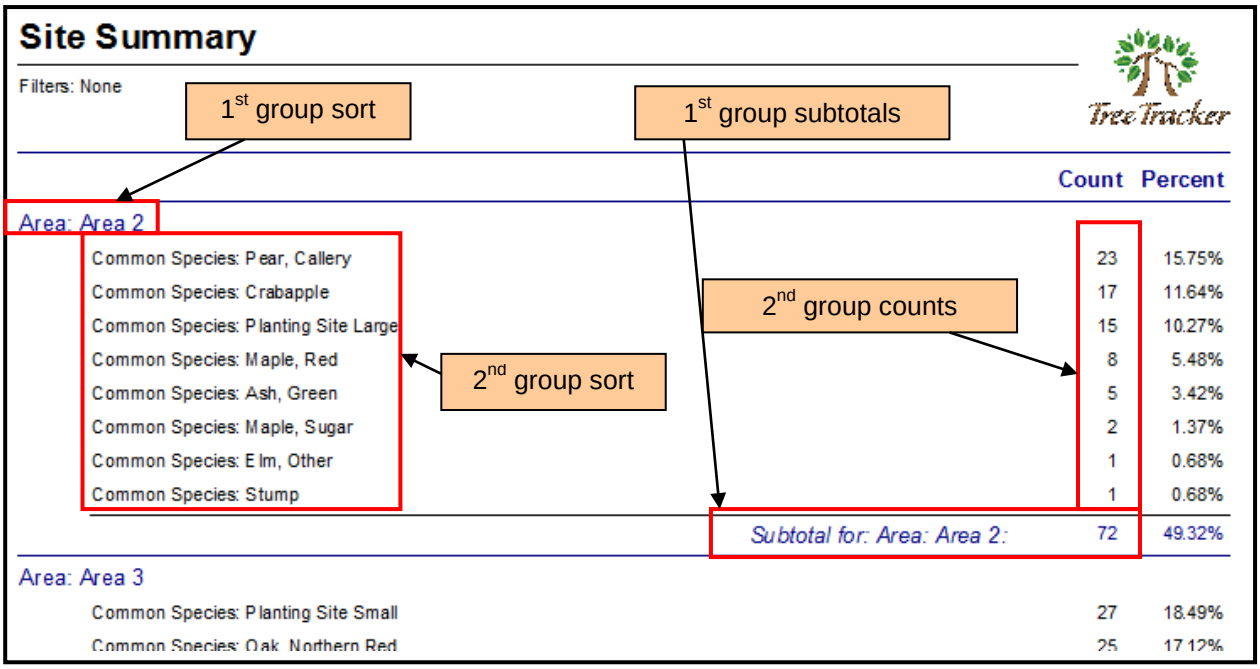
<u>Example 2: Adding A Second Grouping</u>

Let's build on the first example by adding a second grouping. Now you want to know not only how many trees/sites there are in each area, but also how many trees there are of each species in each area. For the second grouping, you select Common Species:

(Zoomed in on Report Grouping section)



When you run the report, it looks like this:

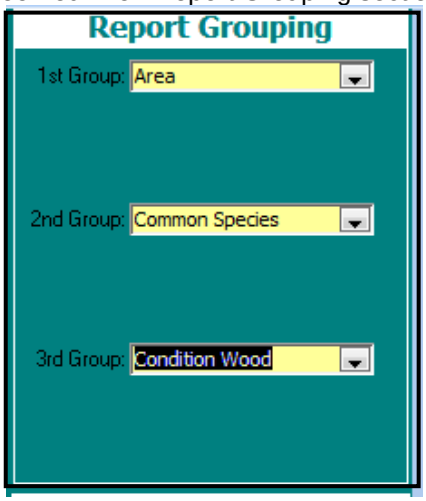


This report tells you, for example, that there are 23 Callery Pear trees, 17 Crabapple trees and 15 large planting sites, etc. for a total of 72 trees/sites in area 2. It also tells you that there are 27 small planting sites in area 3.

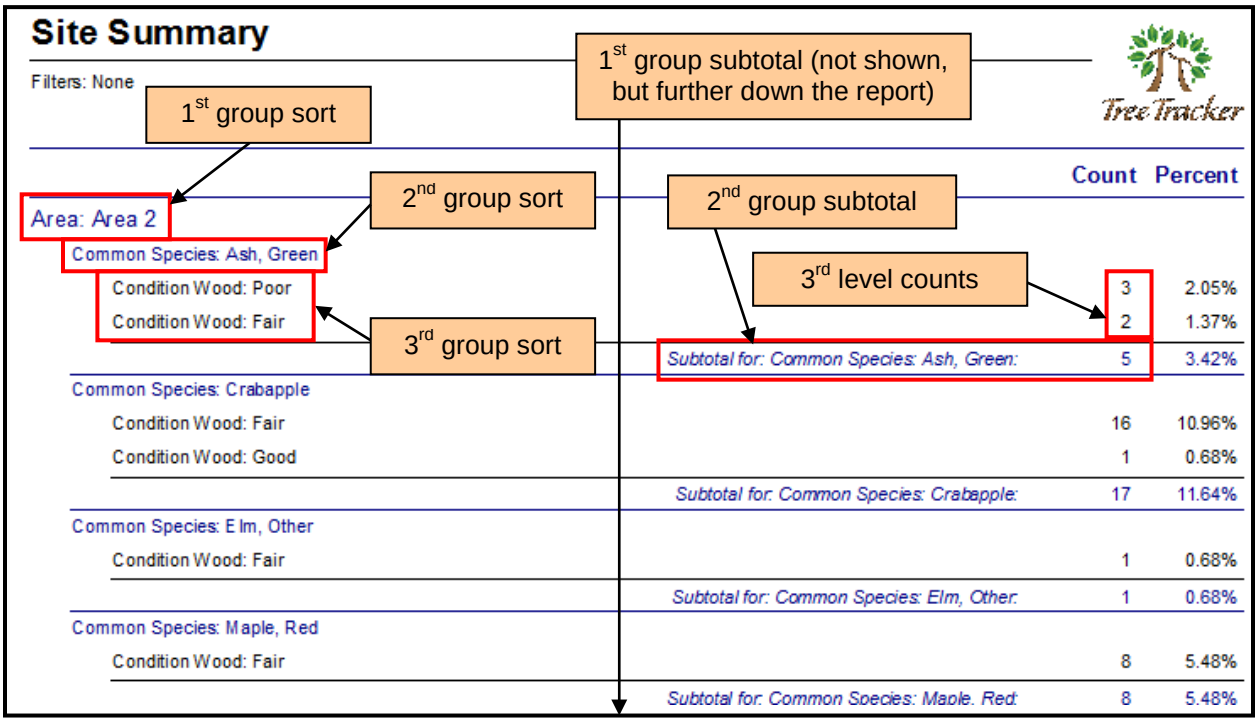
<u>Example 3: Adding A Third Grouping</u>

Let's build on the two previous examples by adding a third and final grouping. Now you want to know not only how many trees/sites there are in each area and what type of species they are, but also for each tree/site, how many have good/fair/poor wood condition. For the third grouping, you select Condition Wood:

(Zoomed in on Report Grouping section)



When you run the report, it looks like this:



This report tells you, for example, that there are three Green Ash trees in poor condition and two in fair condition for a total of five Green Ash trees in area 2. It also tells us that there are 16 Crabapple trees in fair condition and one in good condition for a total of 17 Crabapple trees in area 2.

Example 4: The Same Report with Grouping Order Changed

Let's re-run the same report that you ran in example 3, but this time you're going to change the group order just to see how the report looks running the same fields in different group order. The first grouping will be Condition Wood, the second grouping will be Area and the third grouping will be Common Species.

Site Summary

Filters: None

	Count	Percent
Condition Wood: Dead/Dying		
Area: Area 3		
Common Species: Cottonwood, Eastern	1	0.68%
Common Species: Willow Species	1	0.68%
Subtotal for: Area: Area 3:	2	1.37%
Subtotal for: Condition Wood: Dead/Dying:	2	1.37%
Condition Wood: Fair		
Area: Area 2		
Common Species: Crabapple	16	10.96%
Common Species: Maple, Red	8	5.48%
Common Species: Pear, Callery	7	4.79%
Common Species: Ash, Green	2	1.37%
Common Species: Maple, Sugar	2	1.37%
Common Species: Elm, Other	1	0.68%
Subtotal for: Area: Area 2:	36	24.66%
Area: Area 3		

You'll notice that the count results are the same, but the presentation is different. Because the first level grouping is Condition Wood, the first records on the report are the two trees that are rated Dead/Dying, both which happen to be in Area 3 (the second level grouping). One tree is an Eastern Cottonwood, the other a Willow (the third level grouping). The report then moves on to the next first level grouping entry, fair wood condition, followed by the second level grouping entry, Area 2, followed by the third level grouping entries, the various species. Because there is another second level grouping entry, Area 3, it comes next, etc.

As you can see from the previous four examples, Tree Tracker's summary reports allow you to get to a highly detailed level of counting.

NOTE

For Site Summary Reports:

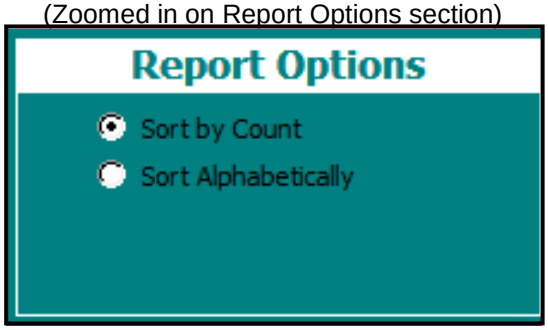
You cannot group by observations (it is not listed as a choice) because a site can have multiple observations.

Instead, if you need a count of how many sites have a specific observation, create a filter to include sites with that observation, and then choose any grouping.

6.3b Summary Report Options

There are two primary sorting options for all summary reports, either by count or alphabetically (in the previous four examples, all four reports were sorted by count).

(Zoomed in on Report Options section)



For **every** summary report, you will need to choose between sorting by count or sorting alphabetically.

To illustrate the difference between the two, let's run the same summary report sorted both ways. In this example, you'll run a Site Summary report of the number of trees/sites on a street sorted by count first (same as example 1 from the previous section). The report looks like this:

Site Summary

Filters: None

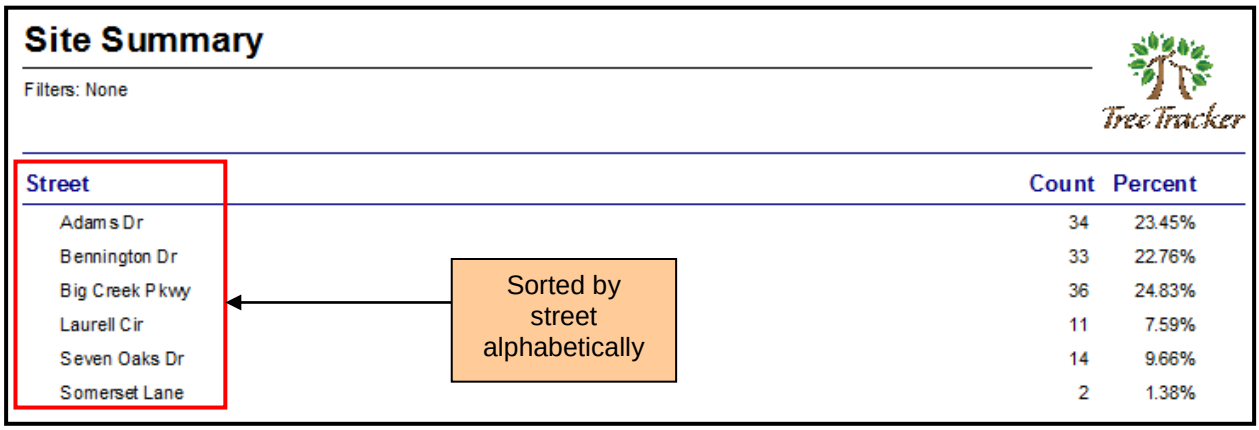
Tree Tracker

Street	Count	Percent
Big Creek Pkwy	36	24.83%
Adams Dr	34	23.45%
Bennington Dr	33	22.76%
Stony Point Dr	15	10.34%
Seven Oaks Dr	14	9.66%

Sorted by count (highest to lowest)

Notice that in this report, the order in which the streets are listed is based on the count, sorted from highest to lowest, not alphabetically.

Now you'll run the same report, but sort alphabetically. The counts are still provided, but not in order from highest to lowest:



Site Summary

Filters: None

Street	Count	Percent
Adams Dr	34	23.45%
Bennington Dr	33	22.76%
Big Creek Pkwy	36	24.83%
Laurell Cir	11	7.59%
Seven Oaks Dr	14	9.66%
Somerset Lane	2	1.38%

6.3c Bucketing

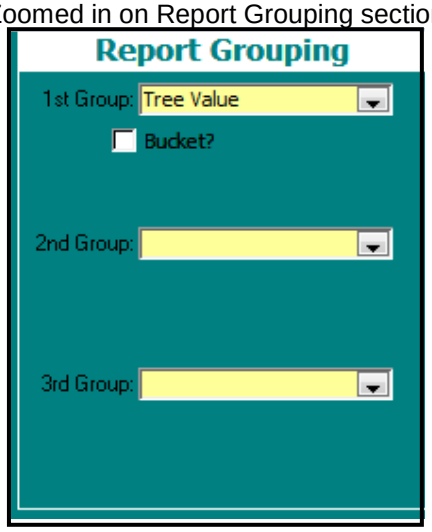
Occasionally, you will notice that a check box with the word "Bucket?" appears when you select certain fields in the Report Grouping section. It appears for fields that have a numeric or date value. Examples of fields with numeric values include a dollar value (Tree Value for example) a number (Diameter for example), or any field with a date (Inventory Date for example),

Bucketing is a term used to describe the ability to break down results by increments in a range of data. Here are three examples of bucketing so you can better understand what it is and what it does.

Example 1: Bucketing A Field with A Numeric Value

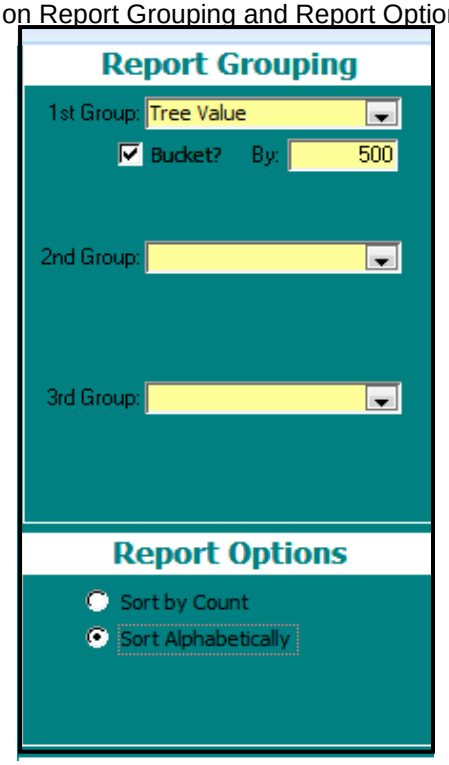
Let's say that you want to run a one group Site Summary report on tree value. You want to know how many trees there are in each dollar range of $500 increments. First you choose Tree Value as your first group selection.

(Zoomed in on Report Grouping section)



You'll notice that the "Bucket?" check box appears. When you click the box to add the check mark, a second box appears. The "By" box wants to know by what increment do you want you range results to be presented. In this case, you want to see tree value results in $500 increments.

(Zoomed in on Report Grouping and Report Options sections)



Because you are more interested in seeing your results sorted by the range you've selected than being sorted in count order, you've chosen to sort alphabetically (which also means numerically). The report will look like this:

Site Summary

Filters: None

Bucketed value displayed

Tree Value (bucketed by 500)	Count	Percent
0	54	37.24%
1 - 500	15	10.34%
501 - 1,000	25	17.24%
1,001 - 1,500	15	10.34%
1,501 - 2,000	10	6.90%
3,001 - 3,500	1	0.69%
3,501 - 4,000	4	2.76%
4,501 - 5,000	5	3.45%
5,501 - 6,000	1	0.69%
6,501 - 7,000	5	3.45%
7,001 - 7,500	4	2.76%
10,001 - 10,500	6	4.14%
Grand Total:	145	

Sorted alphabetically (numerically) by increments of $500

If you had chosen to sort by count, the report would look like this:

Site Summary

Filters: None

Tree Value (bucketed by 500)	Count	Percent
0	54	37.24%
501 - 1,000	25	17.24%
1 - 500	15	10.34%
1,001 - 1,500	15	10.34%
1,501 - 2,000	10	6.90%
10,001 - 10,500	6	4.14%
4,501 - 5,000	5	3.45%
6,501 - 7,000	5	3.45%
3,501 - 4,000	4	2.76%
7,001 - 7,500	4	2.76%
3,001 - 3,500	1	0.69%
5,501 - 6,000	1	0.69%
Grand Total:	145	

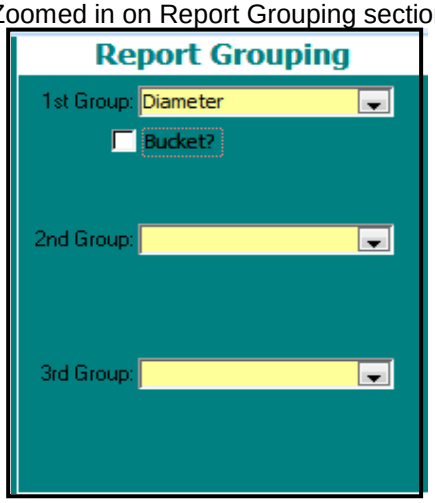
Still in $500 increments, but no longer in numeric order

Sorted by count

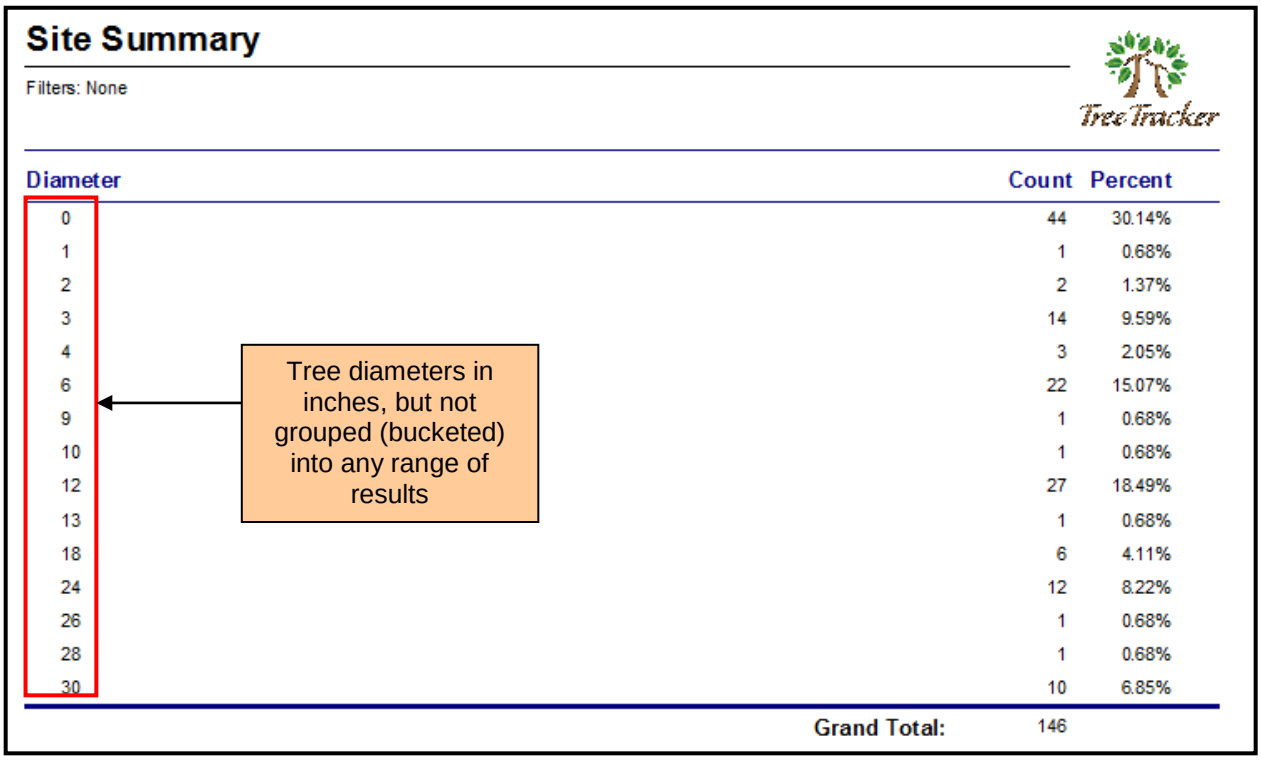
Example 2: Bucketing vs. No Bucketing

In this example, you'll see what a report looks like when you do and don't bucket your results. You'll need to use a field that has a numeric value, Diameter in this case. First you'll run a one-group Site Summary report with Diameter as your selected field, but you will **not** choose to bucket the results.

(Zoomed in on Report Grouping section)



When you run the report (sorted alphabetically), it looks like this:



Site Summary

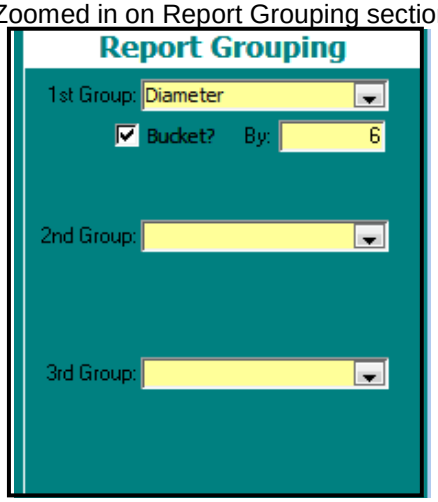
Filters: None

Diameter	Count	Percent
0	44	30.14%
1	1	0.68%
2	2	1.37%
3	14	9.59%
4	3	2.05%
6	22	15.07%
9	1	0.68%
10	1	0.68%
12	27	18.49%
13	1	0.68%
18	6	4.11%
24	12	8.22%
26	1	0.68%
28	1	0.68%
30	10	6.85%
Grand Total:	146	

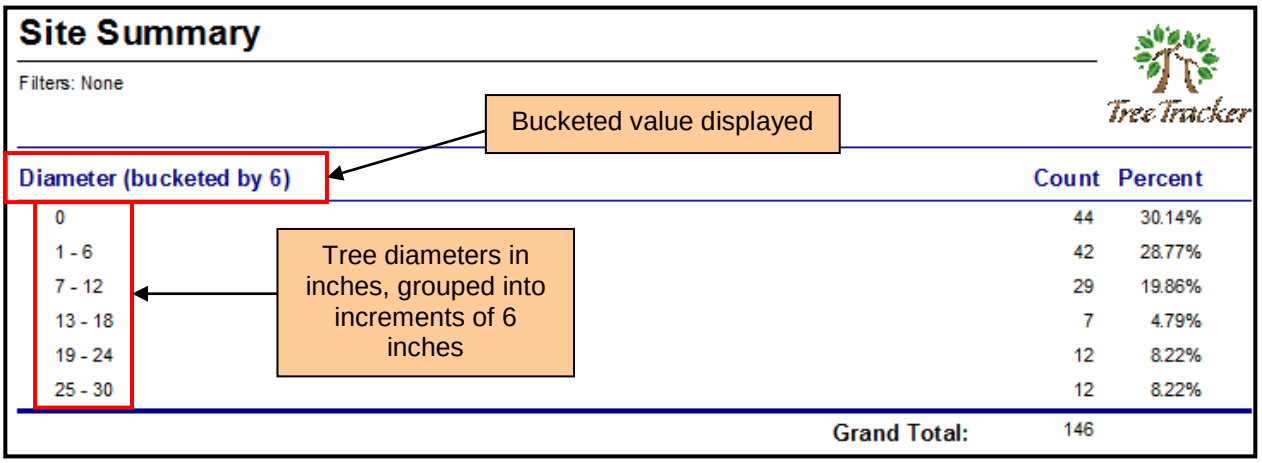
Tree diameters in inches, but not grouped (bucketed) into any range of results

Now you'll run the same report, bucketed into increments of 6 inches.

(Zoomed in on Report Grouping section)



When you run the report (sorted alphabetically), it looks like this:

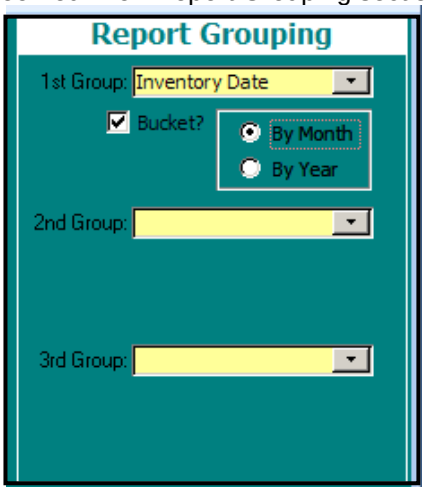


Diameter (bucketed by 6)	Count	Percent
0	44	30.14%
1 - 6	42	28.77%
7 - 12	29	19.86%
13 - 18	7	4.79%
19 - 24	12	8.22%
25 - 30	12	8.22%
Grand Total:	146	

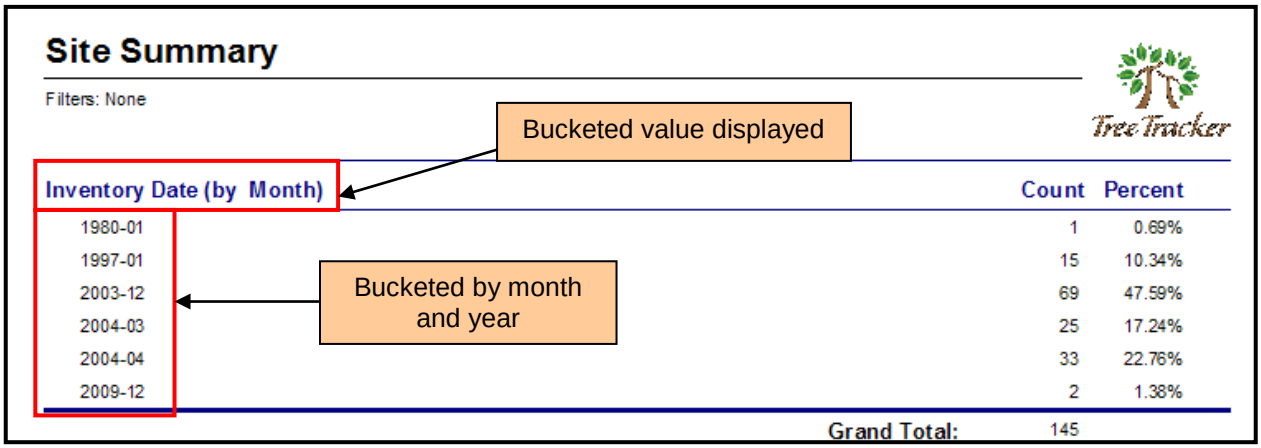
For fields that have a lot of data points in a wide numeric range, choosing to bucket your results will create a much more concise report.

<u>Example 3: Bucketing A Field With Dates</u>
This example will show bucketing for fields whose numeric value is a date. You'll run a one-group Site Summary report with Inventory Date as your field. When you click on the "Bucket?" check box this time, you don't get a blank box into which you can enter a number for the increment you want. Instead, for dates you have the choice of bucketing by either month or year.

(Zoomed in on Report Grouping section)

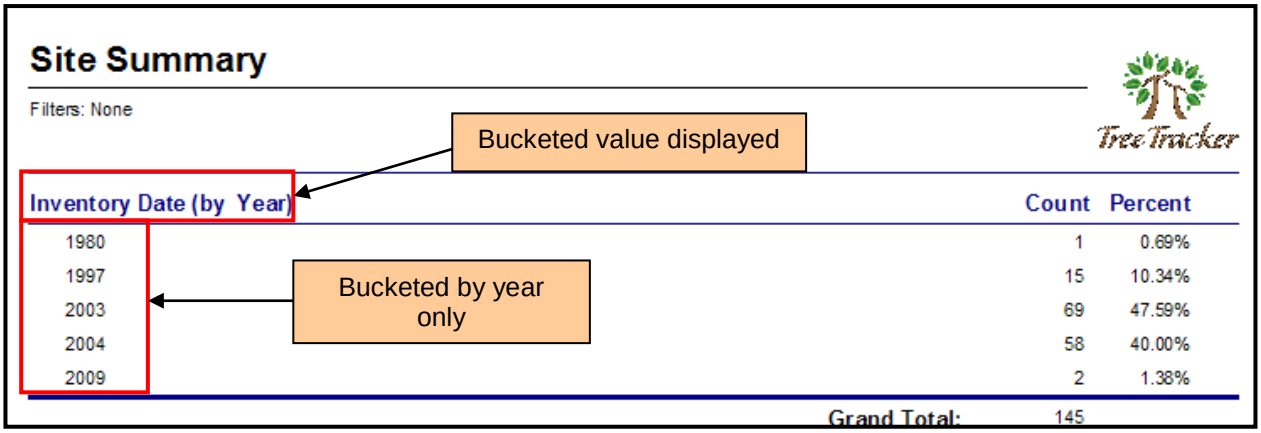


When you run the report bucketed by month (sorted alphabetically), the report looks like this:



Inventory Date (by Month)	Count	Percent
1980-01	1	0.69%
1997-01	15	10.34%
2003-12	69	47.59%
2004-03	25	17.24%
2004-04	33	22.76%
2009-12	2	1.38%
Grand Total:	145	

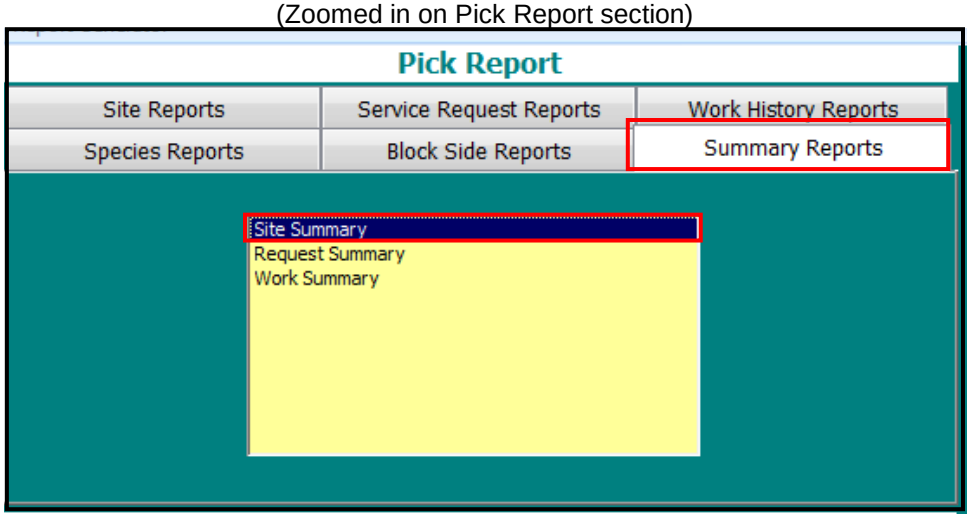
If you run the report bucketed by year (sorted alphabetically), the report will look like this:



Inventory Date (by Year)	Count	Percent
1980	1	0.69%
1997	15	10.34%
2003	69	47.59%
2004	58	40.00%
2009	2	1.38%
Grand Total:	145	

6.3d Site Summary Reports

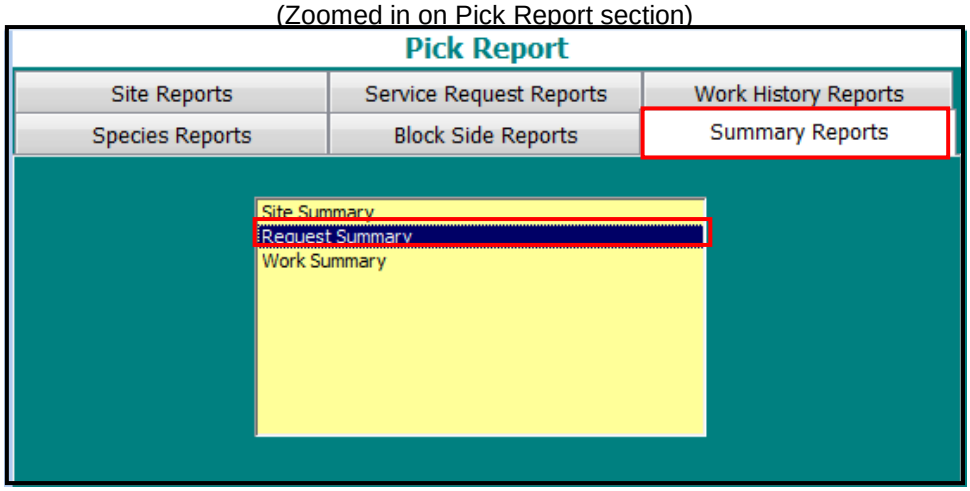
(Zoomed in on Pick Report section)



Site Summary reports provide a count of how many **trees/sites** exist with the criteria you have selected. All of the examples so far in this section have been Site Summary Reports.

6.3e Request Summary Reports

(Zoomed in on Pick Report section)



Request Summary reports provide a count of how many **service requests** exist with the criteria you have selected.

For example, when you run a Request Summary report sorted alphabetically with the first group being Request Type and the second group being Street, the report will look like this:

Request Summary

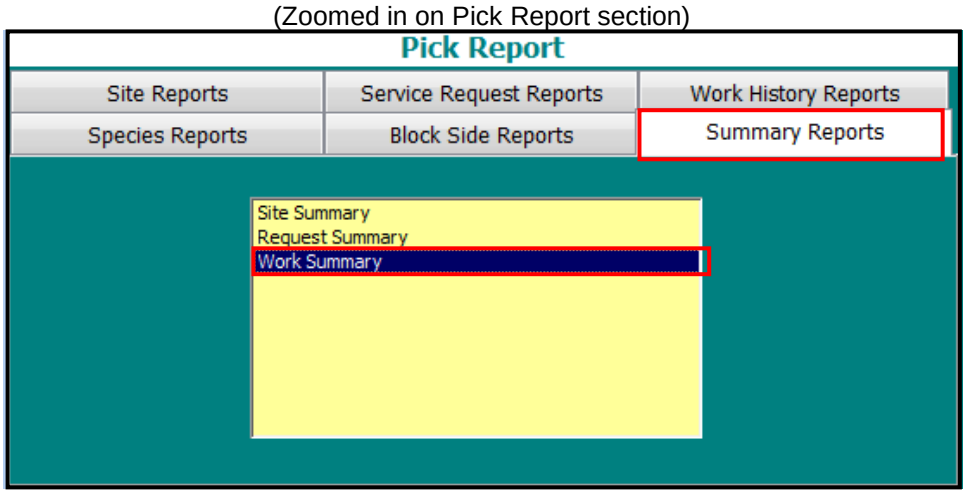
Filters: None

	Count	Percent
Request Type: Inspection		
Street: Adams Dr	1	11.11%
Subtotal for: Request Type: Inspection:	1	11.11%
Request Type: Plant		
Street: Adams Dr	1	11.11%
Street: Somerset Lane	1	11.11%
Subtotal for: Request Type: Plant:	2	22.22%

Remember that the count lists the number of service requests. In this report, Adams Dr. has one service request where the caller requested an inspection to be performed. Two callers, one on Adams Dr. and one on Somerset Lane called in service requests for planting.

6.3f Work Summary Reports

(Zoomed in on Pick Report section)



Work Summary reports provide a count of how many **work histories** exist with the criteria you have selected.

For example, when you run a Work Summary report sorted by count with the first group being Work Type and the second group being Location, the report will look like this:

Work Summary

Filters: None

	Count	Percent
Work Type: Inspection		
Location: Yard	1	1.54%
Subtotal for: Work Type: Inspection:	1	1.54%
Work Type: Plant		
Location: TreeLawn	27	41.54%
Location: Yard	1	1.54%
Subtotal for: Work Type: Plant:	28	43.08%

Remember that the count lists the number of work histories. In this report, one work history was an inspection performed on a tree/site located in a yard. 27 plantings were performed on sites located on a treelawn and one located in a yard for a total of 28 work histories where planting was done.

6.4 Report Filters

This section will discuss how to create filters in order to include or exclude specific data. You will be able to choose the field that you want to filter and how you want it filtered. The level of detail available to you in filtering data is quite extensive!

6.4a Types of Fields That Can Be Filtered

If Tree Tracker keeps track of it, you can filter it. This includes data in all of the fields on the Site Form, and all associated data for many of those fields. What does associated data mean?

As an example, you can create a filter to have a report list only certain types of species of tree. Species is a field on the Site Form. But Tree Tracker keeps a great deal more information (associated data) about species than just what appears on the Site Form. If you look at the Species Lookup Table, you know that for each species, there is associated data for the species code, rating, genus, family, cultivar, etc. For example, you can create filters to include/exclude all deciduous or evergreen trees on a report even though that information doesn't appear on the Site Form.

The type of fields you can select to filter depends on what report group you have chosen. If you have chosen the Site Reports group in the Pick Report section, the list of fields that can be filtered will be different from the list of fields that can be filtered if you have chosen the Service Request Reports group. We encourage you to choose different report groups and see what data fields are available to filter.

6.4b Creating Filters

We'll take you step-by-step through creating several filters, and along the way show you some features of the Report Filters section.

Example 1: Filtering In For A Specific Value
In this first example, you are going to create a simple filter for a report in the Site Reports group to show only tree/site records that are managed by a city, thus excluding trees/sites that are managed privately, both or unknown.

First, you need to make sure that you have selected a report in the Site Reports group. If by mistake you have selected a report from another group, the field you are looking to filter may not be listed.

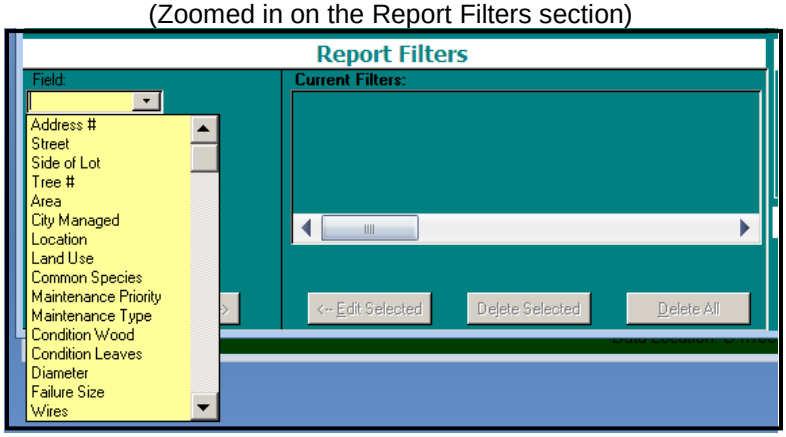
Once you are sure you have chosen the proper report, you click on the drop-down arrow in the "Field" box to access the list of fields that can be filtered.

NOTE

You do not have to click on a drop-down arrow in order to choose from the list of fields or items.

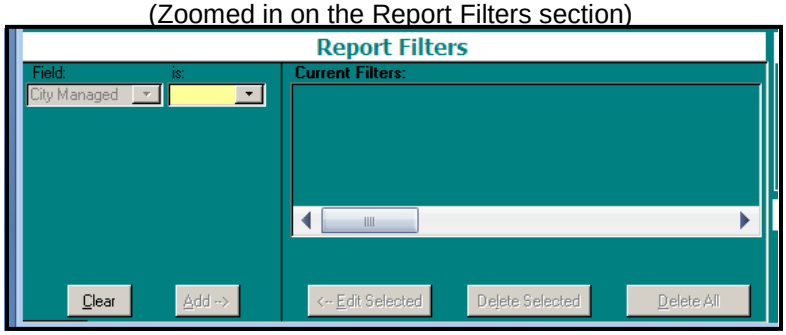
You can type directly into the drop-down box the first few letters of the field or item name if you know it, and the names of fields or items matching those letters will appear until the field or item you want appears.

(Zoomed in on the Report Filters section)



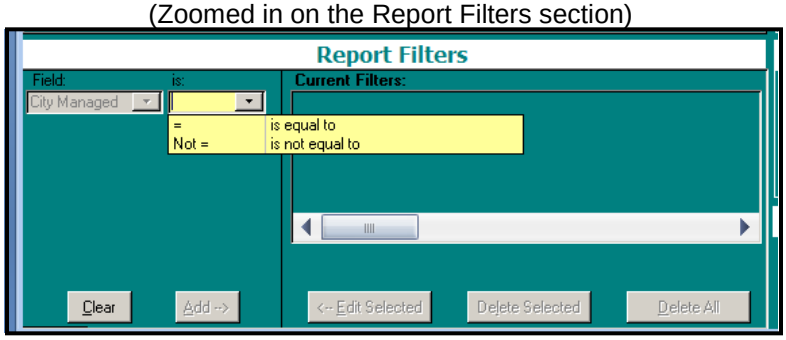
By clicking on the field you want to filter (City Managed in this example), the "Field" box is filled in and the next box, the "Is" box, is highlighted.

(Zoomed in on the Report Filters section)



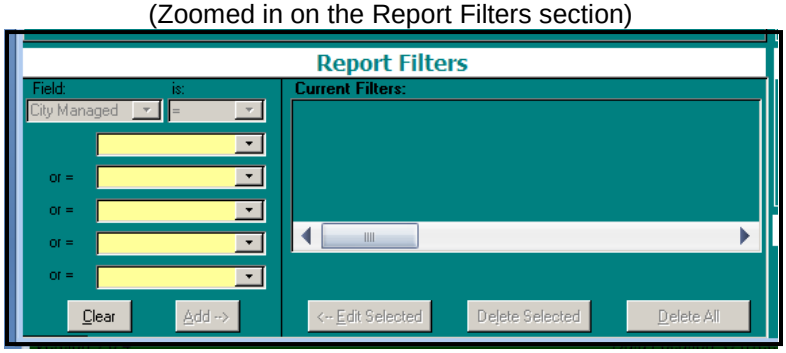
The "Is" box is where you set the parameters for the records you are filtering.

(Zoomed in on the Report Filters section)



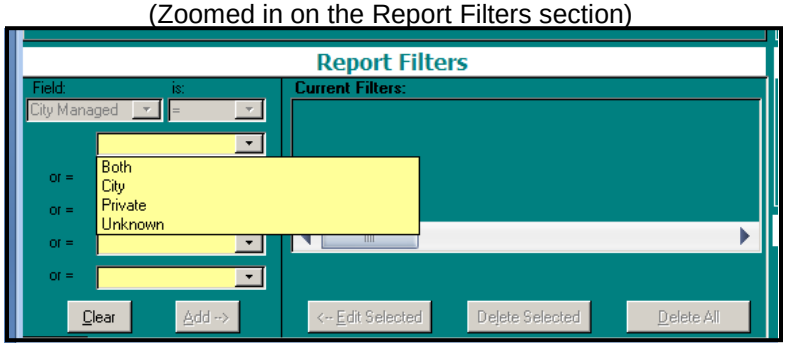
For a field that contains text, such as the City Managed field, the choice will always be "is equal to" or "is not equal to". Fields that have numeric values have more choices, and the second example will show this. Because you are interested in seeing only those tree/site records that are managed by a city, you choose "is equal to", and the = sign is entered in the "Is" box.

(Zoomed in on the Report Filters section)



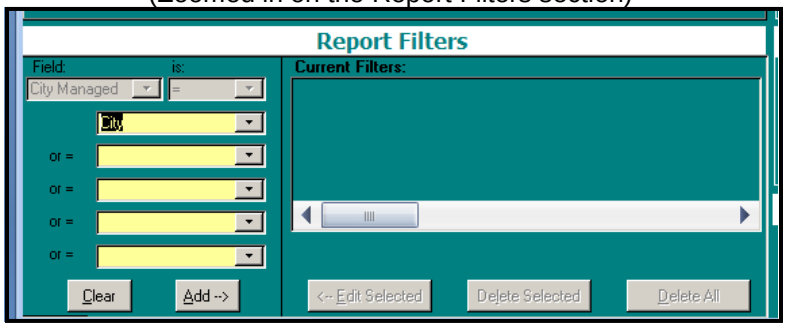
Now you have a series of boxes where you can choose specifically what information you want included. When you click on the first drop-down arrow here, you will get a list of the different City Managed choices.

(Zoomed in on the Report Filters section)



Because you are interested in seeing only those trees/sites that are managed by a city, you choose City, and it is entered in the first box.

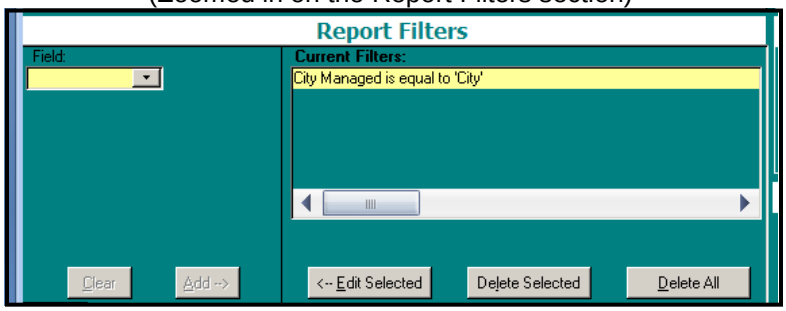
(Zoomed in on the Report Filters section)



At this point, you have told Tree Tracker that you want to filter the City Managed field and that the field should be equal to City only. If you wanted to add in more choices for the City Managed field, you could do so on the "Or" lines and choose additional items. This is useful if you have a field with lots of items to choose from and you want to select a group of them.

In this example, however, you just want to see tree/site records that are managed by a city, so you click "Add" and the filter is added to the current filters list.

(Zoomed in on the Report Filters section)



Now that your filter is in the current filters list, you can go back and edit it by clicking "Edit Selected", delete the filter by clicking "Delete Selected" or, if you have multiple filters, delete them all by clicking "Delete All". Remember that if you want to save this filter for future use,

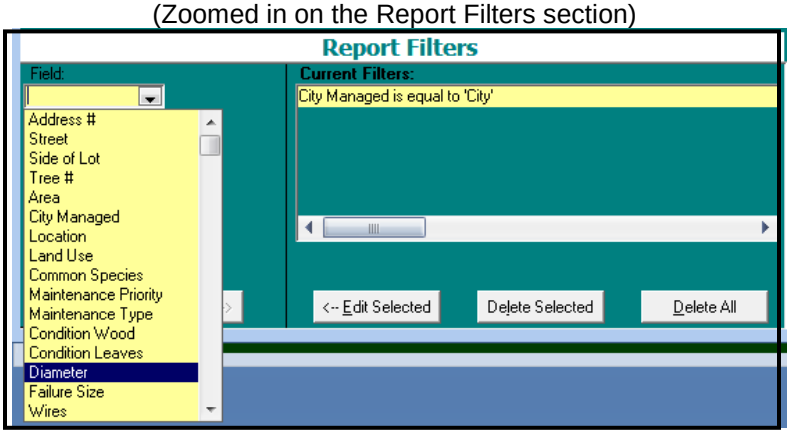
you can save the report settings by clicking "Save Report Settings" in the Open / Save / Run section of the Report Generator. See section 6.5: Saving and Opening Report Settings to learn more about this.

Example 2: Filtering For Fields with Numeric Values

In this second example, you'll build on what you did in the first example by adding a second filter. You're going to use the same report and this time, you are looking to see tree/site records within a particular tree diameter range. This will demonstrate setting up filters for fields that have a numeric value and managing multiple filters.

You'll start as you did in the first example by clicking on the drop-down arrow in the "Field" box to access the list of fields that can be filtered.

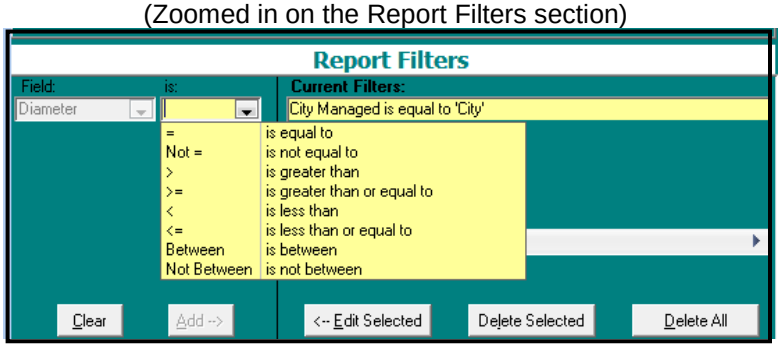
(Zoomed in on the Report Filters section)



Because you are looking to see a specific range of tree diameters, you choose Diameter. Once you have clicked on Diameter, the "Is" box is highlighted.

Because Diameter is a numeric value, you are no longer choosing "is equal to" or "is not equal to" a pre-set list of choices. Now, when you click on the drop-down arrow in the "is" box, you have eight options.

(Zoomed in on the Report Filters section)

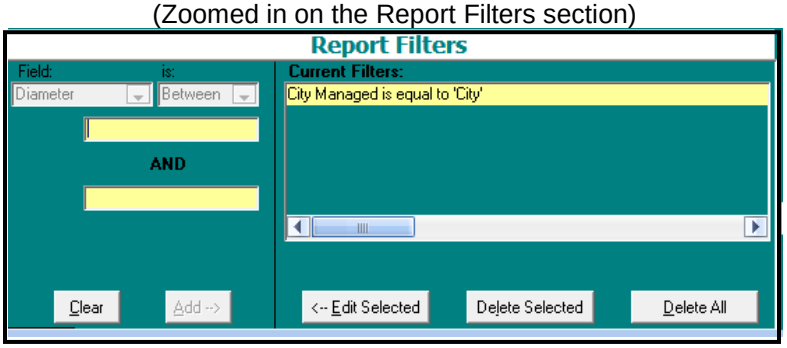


For any field with numeric values, the eight parameter choices are:

Symbol	Descriptor	Definition
=	is equal to	You are seeking to include a specific number.
Not =	is not equal to	You are seeking to exclude a specific number.
>	is greater than	You are seeking anything over (but not including) a specific number.
>=	is greater than or equal to	You are seeking anything over (and including) a specific number.
<	is less than	You are seeking anything under (but not including) a specific number.
<=	is less than or equal to	You are seeking anything under (and including) a specific number.
Between	is between	You are seeking a range of numbers between two specific numbers.
Not Between	is not between	You are seeking a range of numbers outside the range of two specific numbers.

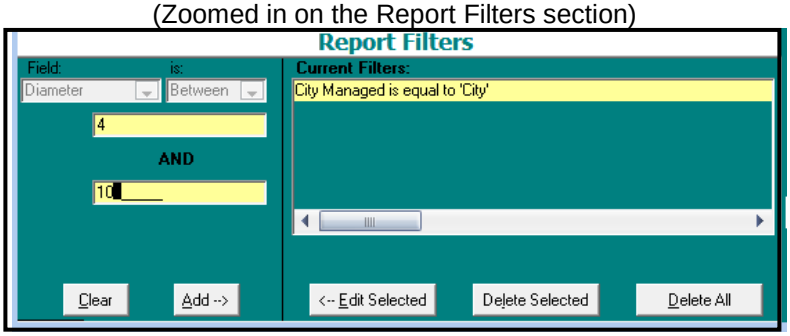
In this example, you are looking to see tree/site records within a particular tree diameter range, so you will choose "Between".

(Zoomed in on the Report Filters section)



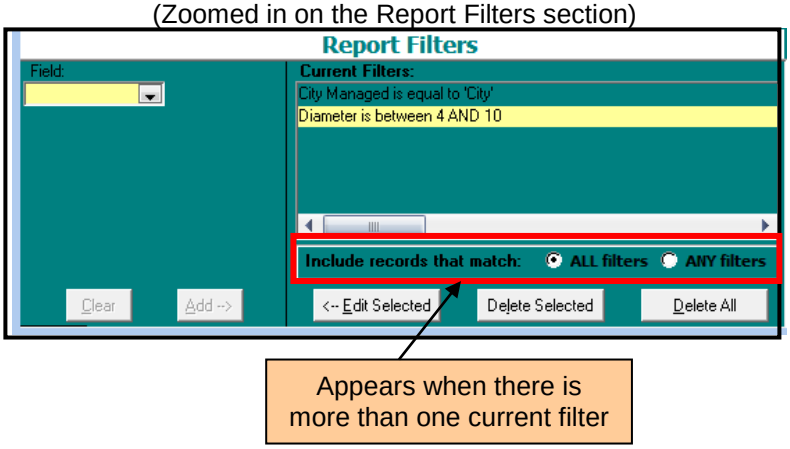
Two boxes appear where you will enter the range of numbers for the diameter. For this example, the range is between 4 and 10 inches. If you had chosen a parameter like "is less than or equal to", there would be only one box because only one number would be needed.

(Zoomed in on the Report Filters section)



Once you have entered the two numbers for the range of diameters, you click "Add" and the second filter is added to the first in the list of current filters.

(Zoomed in on the Report Filters section)



You'll notice that a new box has appeared once you added the second filter. Tree Tracker wants to know if you want to include records that match ALL filters, or ANY one of the filters.

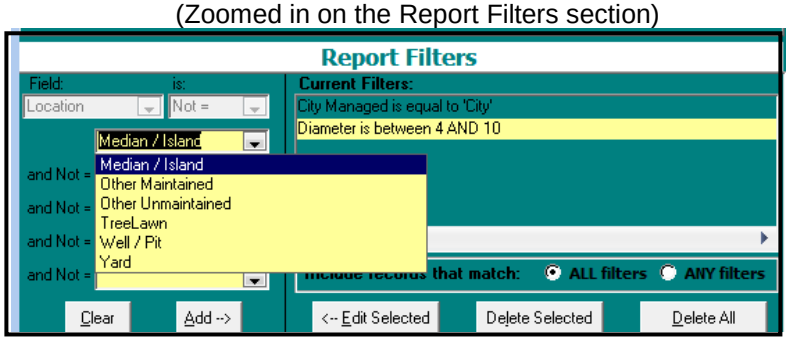
If you choose "ALL filters" in this example, tree/site records will be included in the report if they fall in the defined tree diameter range **AND** are city managed. Any record outside of the tree diameter range and not city managed will be excluded.

If you choose "ANY filters", tree/site records will be included in the report if they fall in the defined tree diameter range **OR** are city managed. This means in this example that a city managed tree/site outside of the tree diameter range will be included because it matches the city managed filter. It does not matter that it doesn't match the tree diameter range filter because it does match at least one filter. A tree/site not city managed would also be included if it is within our predefined tree diameter range.

<u>Example 3: Filtering Out Specific Values</u>
In this third example, you'll continue by adding a third filter that will demonstrate filtering **<u>out</u>** two items from the same field at once. For this filter, you want to exclude any tree/site record where the tree/site is located on a median/island or a well/pit, but include all other locations.

In this example, you've already chosen the location field and the "is not equal to" parameter. When you click on the drop- down arrow, you'll choose Median / Island from the various tree/site locations.

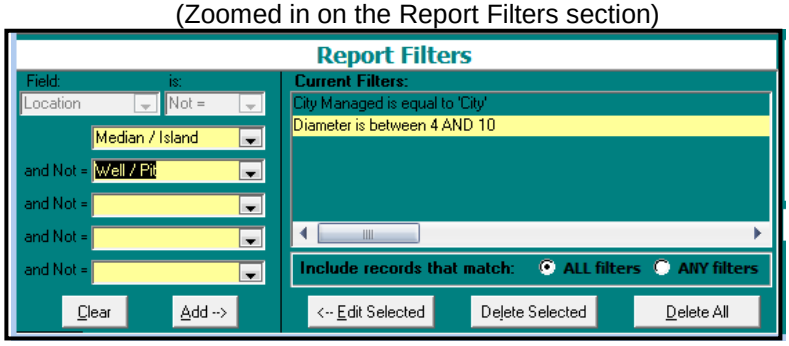
(Zoomed in on the Report Filters section)



Now you want to add a second location to exclude. Notice that the additional drop-down boxes are now "and Not" boxes instead of "Or" boxes. This is because you have chosen the "is not equal to" parameter.

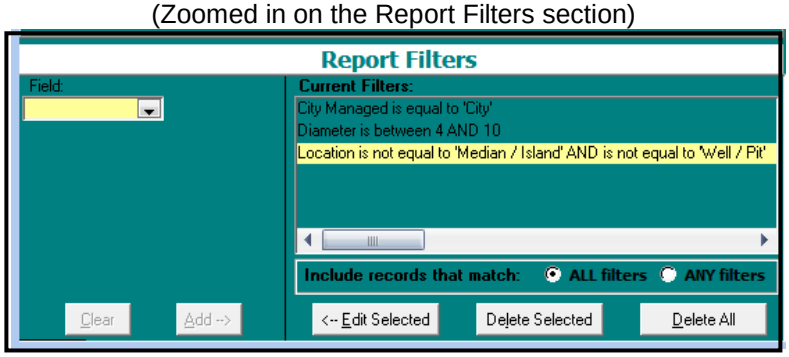
Instead of clicking on the drop-down arrow to choose another location, you've decided to take a shortcut and type in the letter W into the "and Not" box. Well / Pit appears because it is the only item beginning with W on the list.

(Zoomed in on the Report Filters section)

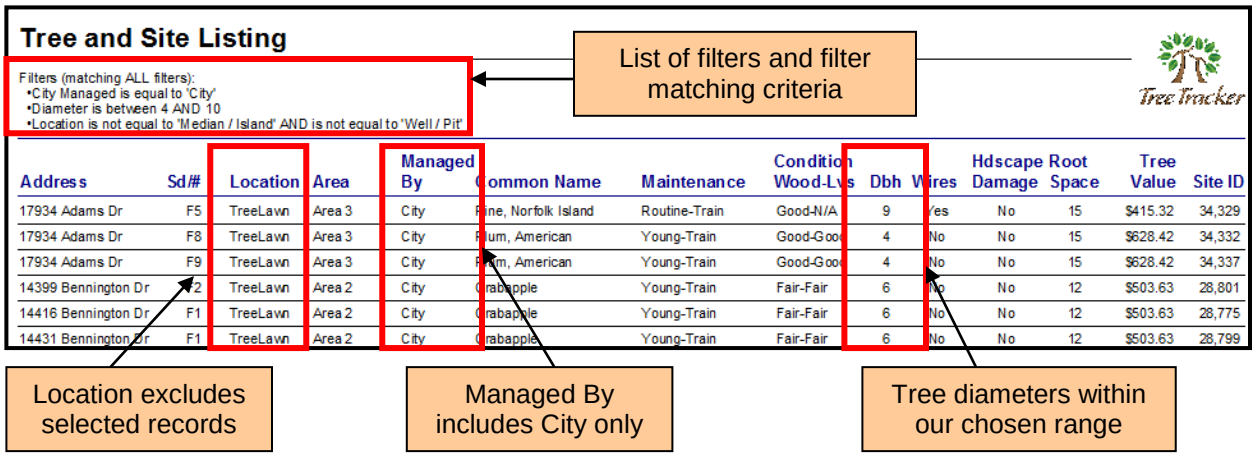


Finally, click "Add" to include the third filter on the current filters list.

(Zoomed in on the Report Filters section)



When you run the report, it will look like this:



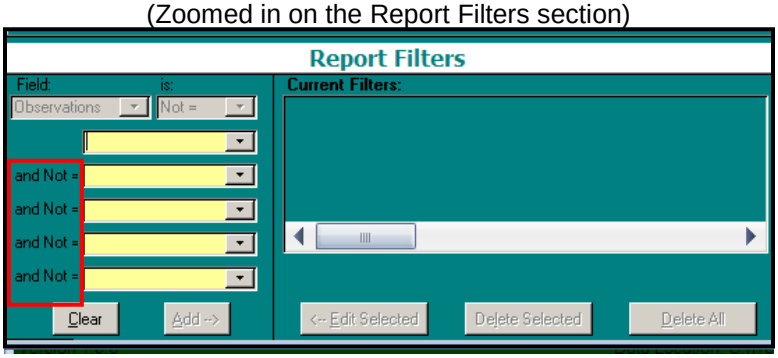
Address	Sd/#	Location	Area	Managed By	Common Name	Maintenance	Condition Wood-Lvs	Dbh	Wires	Hdscape Damage	Root Space	Tree Value	Site ID
17934 Adams Dr	F5	TreeLawn	Area 3	City	Pine, Norfolk Island	Routine-Train	Good-N/A	9	Yes	No	15	$415.32	34,329
17934 Adams Dr	F8	TreeLawn	Area 3	City	Plum, American	Young-Train	Good-Good	4	No	No	15	$628.42	34,332
17934 Adams Dr	F9	TreeLawn	Area 3	City	Plum, American	Young-Train	Good-Good	4	No	No	15	$628.42	34,337
14399 Bennington Dr	F2	TreeLawn	Area 2	City	Crabapple	Young-Train	Fair-Fair	6	No	No	12	$503.63	28,801
14416 Bennington Dr	F1	TreeLawn	Area 2	City	Crabapple	Young-Train	Fair-Fair	6	No	No	12	$503.63	28,775
14431 Bennington Dr	F1	TreeLawn	Area 2	City	Crabapple	Young-Train	Fair-Fair	6	No	No	12	$503.63	28,799

Example 4: Filtering Observations

Filtering in observations is handled a bit differently than any other field. Because it is possible that each tree/site can have more than one observation, you need to be able to filter the report so that it will display trees/site with any or all of the observations you've selected.

First of all, if you choose to filter out specific observations, you choose Observations as your field as usual, but you choose the parameter to be "is not equal to".

(Zoomed in on the Report Filters section)

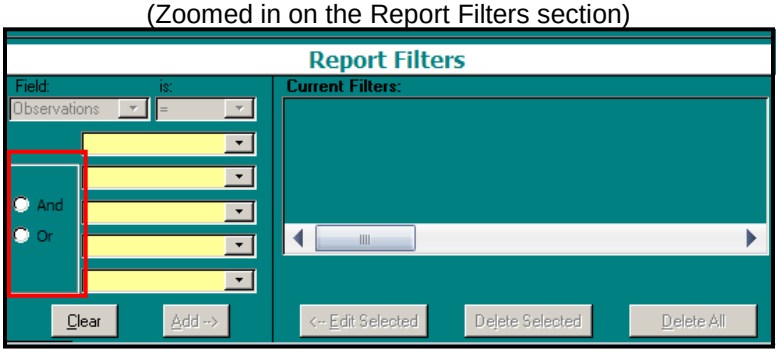


You'll notice that the additional drop-down boxes are "and Not" boxes, which is the same for all non-numeric fields when you are excluding specific values.

But let's say that you want to filter to include observations. Because an individual tree/site can have multiple observations, how do you handle that?

You start by choosing Observations as your field and choose "is equal to" as the parameter.

(Zoomed in on the Report Filters section)



In addition to choosing what observations you want to include, you'll notice that you have a choice of "And" or "Or".

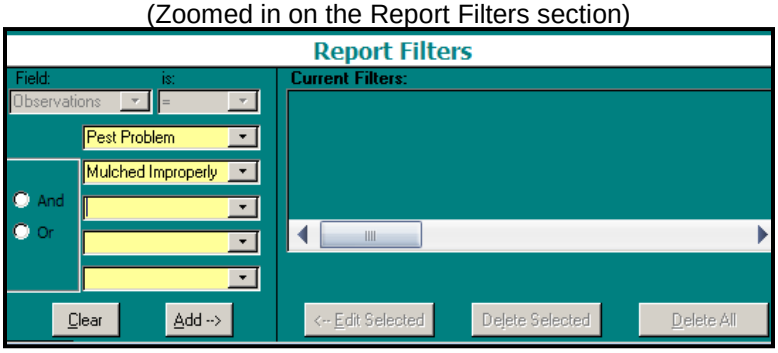
If you want to filter in just one observation, let's say Pest Problem for example, you just select it and click "Add". There is no need to choose either "And" or "Or" because you are looking for only one observation.

But if you are looking to filter to include two or more observations, you do need to make a choice. You can choose the "And" option, in which case any tree/site that includes **ALL** of the selected observations will be included in the report. Or you can choose the "Or" option, in which case any tree/site that includes **ANY** of the selected observations will be included.

For example, let's say that you want to run a report where you see trees/sites that have pest problems and are poorly mulched.

You select Observations as your field, "is equal to" as the parameter, and Pest Problems and Mulched Improperly as the observations you want included.

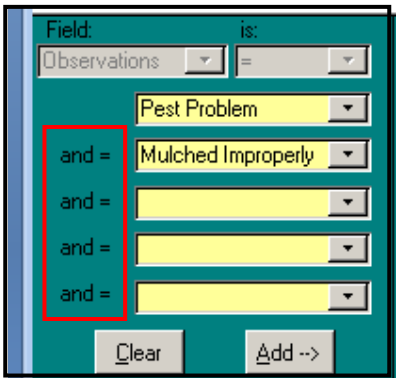
(Zoomed in on the Report Filters section)

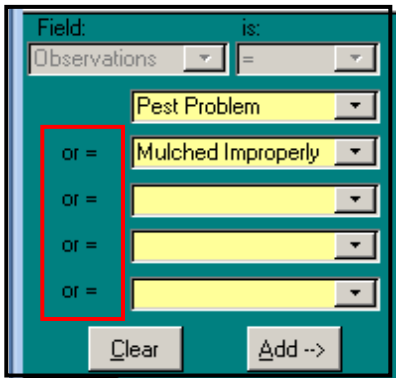


If you try to click "Add" now (without choosing "And or "Or"), you'll get this error message:

If you want to see only those trees/sites that have **both** pest problems **AND** are mulched improperly, you choose "And".

If you want to see trees/sites that have **either** pest problems **OR** are mulched improperly, you choose "Or".





At this point you can click "Add" and the observations filter will be included when you run the report.

6.4c Filtering Summary Reports

So far we've talked about filtering standard reports. But what about filtering summary reports?

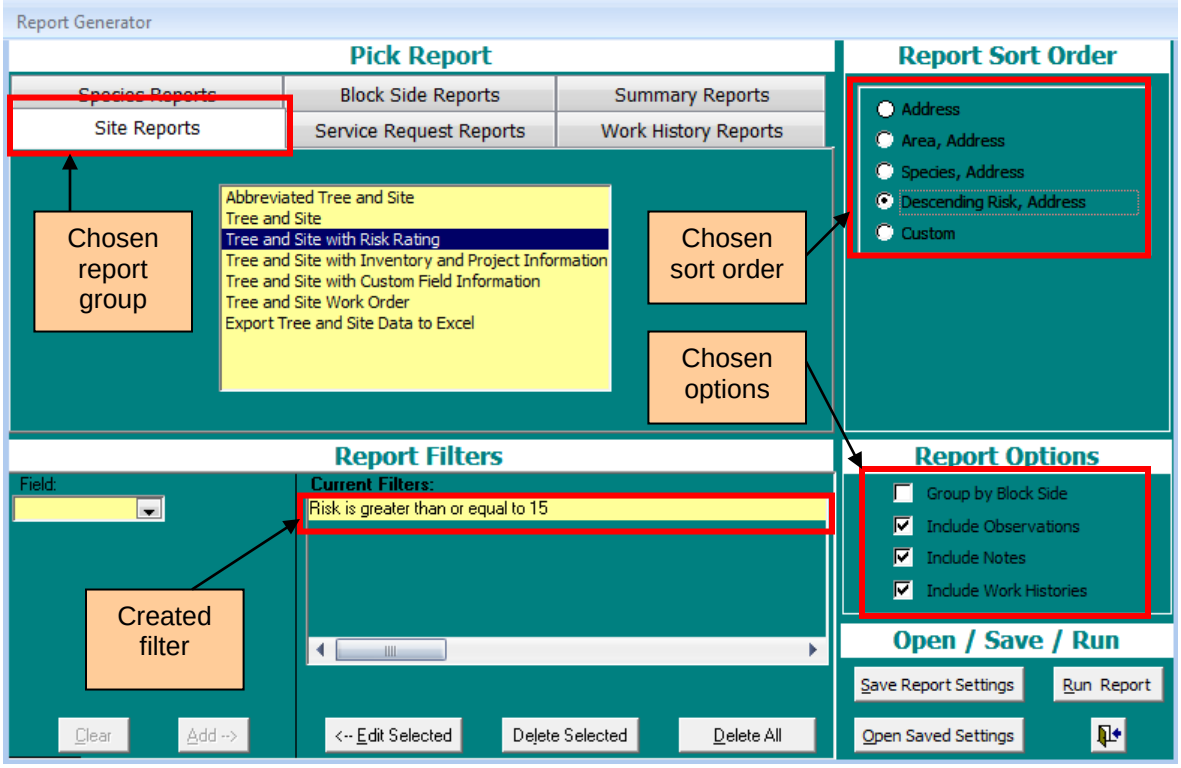
When you filter a summary report, the result is that the summary count will be affected. For example, let's say that you run a Site Summary report that tells you that you have 100 trees in Area 1 and 120 trees in Area 2. Then you decide to filter in for trees with a risk rating of 15 or greater, excluding trees with a risk rating of less than 15. The new report tells you that there are 12 trees in Area 1 and 17 trees in Area 2 that are high risk.

The end result is that by filtering the summary report, the count has changed to reflect only the values you are seeking.

6.5 Saving and Opening Report Settings

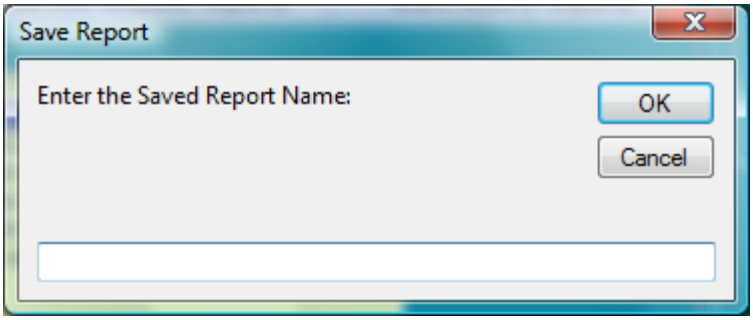
Once you have gone through the steps of selecting your report group, choosing the sort order, adding options and creating filters, you may want to save those settings so that you can easily run the same report again in the future. This is especially useful for saving filters or applying the same filters and options to other reports within the same grouping.

For example, let's say that you have selected a Tree and Site Listing with Risk Rating report (in the Site Reports group) where you have created a filter to show only trees that have a risk rating of 15 or higher. Because these are high risk trees, you've also chosen to add options to see observations, notes and work histories for each tree to the report to help you learn more. You also want to see the highest risk trees listed first, so you've chosen to sort the report by descending risk. With these settings, the Report Generator screen will look like this:

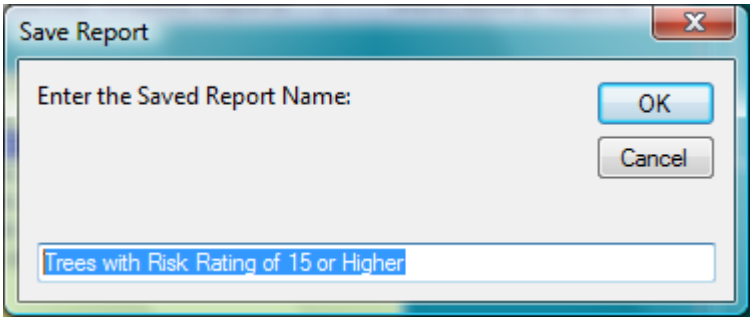


You'd like to run that same report occasionally in the future to keep tabs on high risk trees in your municipality.

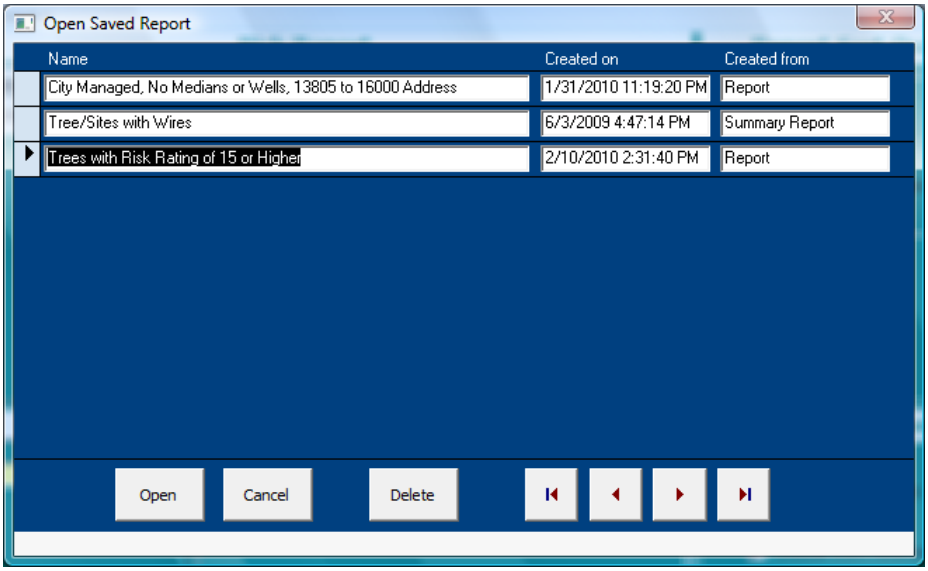
When you click "Save Report Settings" in the Open / Save / Run section of the Report Generator, this window will appear:



When you type in the name you create for the report, it would be wise to name it based on the unique settings you selected. In this case, you'll name it based on the fact that you are looking at trees with a risk rating of 15 or higher.



Click "OK" to save the report settings or "Cancel" to abandon saving the report settings. In the future, if you click "Open Saved Report" in the Open / Save / Run section of the Report Generator, this window will appear:



You will see a list of saved reports, along with the date created and what type of report the saved report is based on, (Summary Report, (standard) Report or Mass Work History Update).

Select the report you want to open, then click "Open". You can also delete a saved report by selecting it and clicking "Delete". Click "Cancel" to abandon opening a saved report. As you can see, our report is there for us to use without having to recreate the filter or choose the sort order and options again.

6.5a Using Saved Report Settings with Other Reports

One of the advantages of Tree Tracker's Report Generator is that you can use saved report settings to run other reports.

It's important to remember that when you save report settings, the settings being saved are:

1. Report group
2. Report sort order (or report grouping if summary report)
3. Report filters
4. Report options (if any)

What's NOT saved is what individual report you chose to run. If you open your saved report in the future, the sort order, filters and options you've chosen will be there, BUT NOT the same individual report. That's because Tree Tracker saves the report to a REPORT GROUP, not INDIVIDUAL reports.

For example, in the previous example you were in the Site Reports group running a Tree and Site Listing with Risk Rating report from that group. You created and saved your report and called it "Trees with Risk Rating of 15 or Higher". When you open your saved "Trees with Risk Rating of 15 or Higher" report again, the individual report (Tree and Site Listing with Risk Rating) is not selected, and you can now choose ANY report in the Site Reports group to run with your saved report settings.

Because saved reports are created and saved to a specific report group, you cannot open them in other groups (Summary Reports and the Mass Work History Update are an exception, and we'll get to that in the next section). For example, our saved "Trees with Risk Rating of 15 or Higher" report was created in the Site Reports group. You can only open it if you are in the Site Reports group. If you are in another group, say Service Request Reports for example, and click "Open Saved Report" now, your report will not appear. Only reports created and saved in the Service Requests Reports group will appear there. Saved reports can only be opened if you are in the specific report group in which they were created and saved.

6.5b Saved Report Settings: Summary Reports

Report settings created and saved from the **Site Reports group** can also be opened and run if you are in the **Site Summary report** in the Summary Reports group or in the **Mass Work History Update utility** in the Utilities section of Tree Tracker. The opposite is also true. You can open report settings created and saved from a Site Summary report or Mass Work History Update and run them in the Site Reports group. The same goes for report settings created and saved from the Service Request Reports group and the Service Request Summary report, and report settings created and saved from the Work History Reports group and the Work History Summary report.

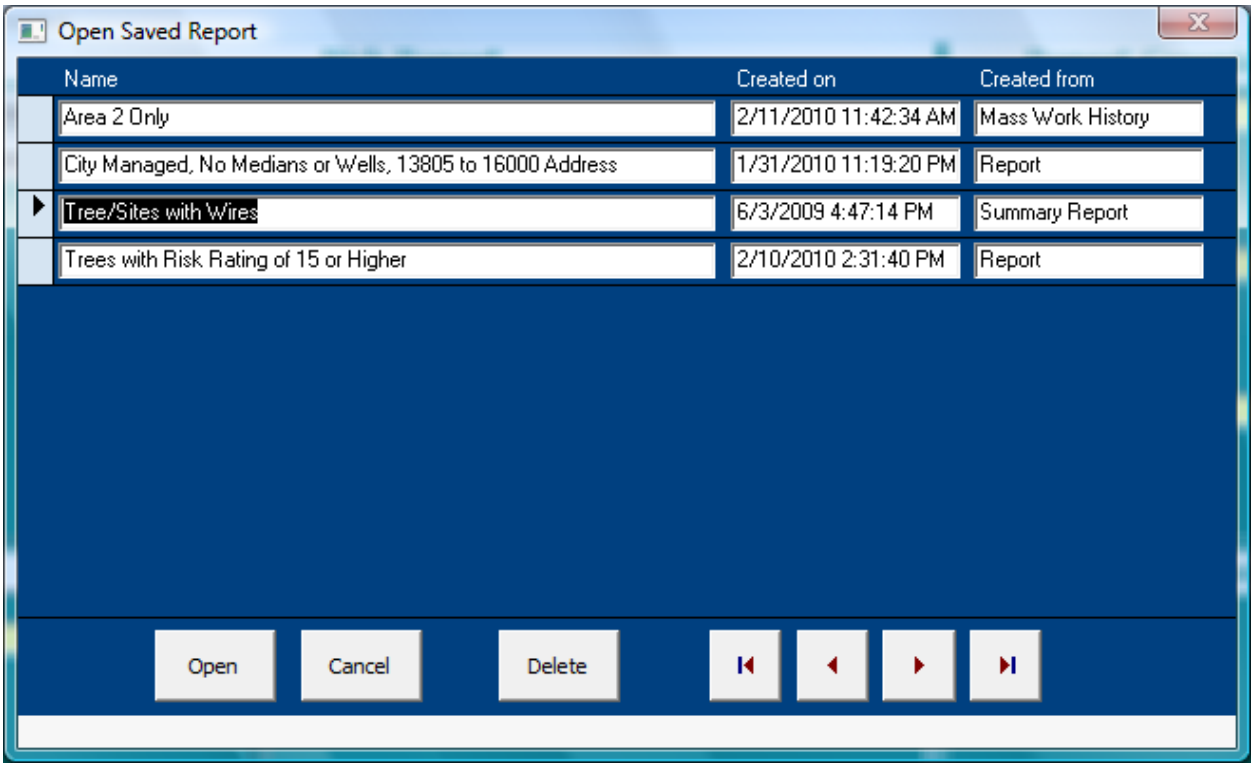
IMPORTANT NOTE

For the Mass Work History Update utility:

This utility has the ability to create, save and open filters, and share these filters with the Site Reports group and Site Summary report. Additionally, filters created from the Site Reports group and Site Summary report can be shared with the Mass Work History Update utility.

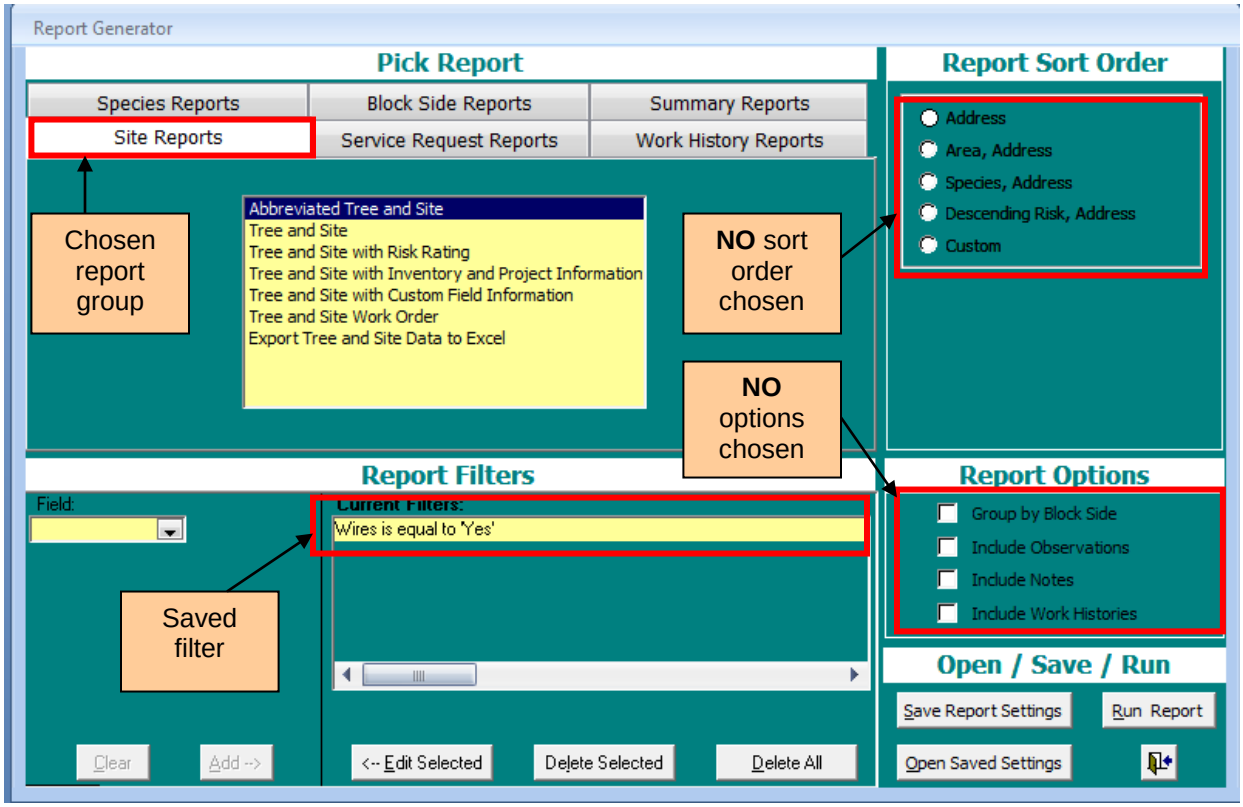
Go to section 7.1: Mass Work History Update to learn more about this utility.

Let's say that you are in the Site Reports group and click on "Open Saved Report". This window appears:



You'll notice that the first report was created from the Mass Work History Update utility, the second and fourth reports were created from the Site Reports group and the third report was created from the Site Summary report.

You can open the third report in this example (Trees/Sites with Wires) while in the Site Reports group even though it was created from a Site Summary report. When you do, this is what it will look like:



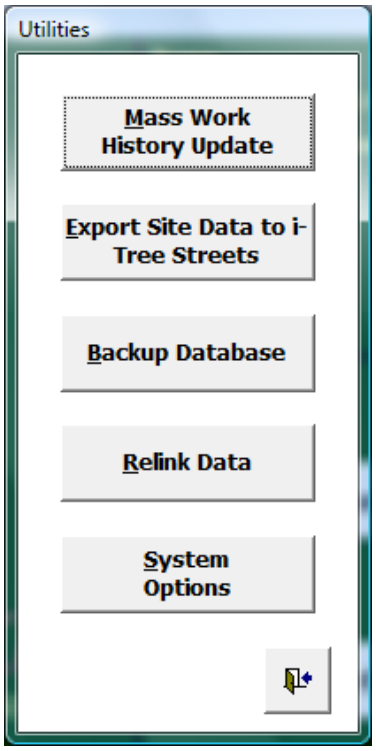
Notice that sort order and options have not been selected. That's because this report was created and saved from a Site Summary Report, but opened in the Site Reports group. The saved filter is the only setting that opens when you open a report created from a summary report in a standard report group. You'll need to choose the sort order and options (if any) before running this report.

The opposite is also true. If you open a report created from a standard report group in a summary report, the saved filter will be the only thing that opens. You'll need to choose the report grouping and options for your summary report before you can run it.

Tree Tracker allows you to open reports created from a standard report group in a summary report (or vice versa) so that you can apply the same filter or set of filters to both types of reports.

7. Utilities

When you click on the "Utilities" button on the main menu, this screen will be displayed:



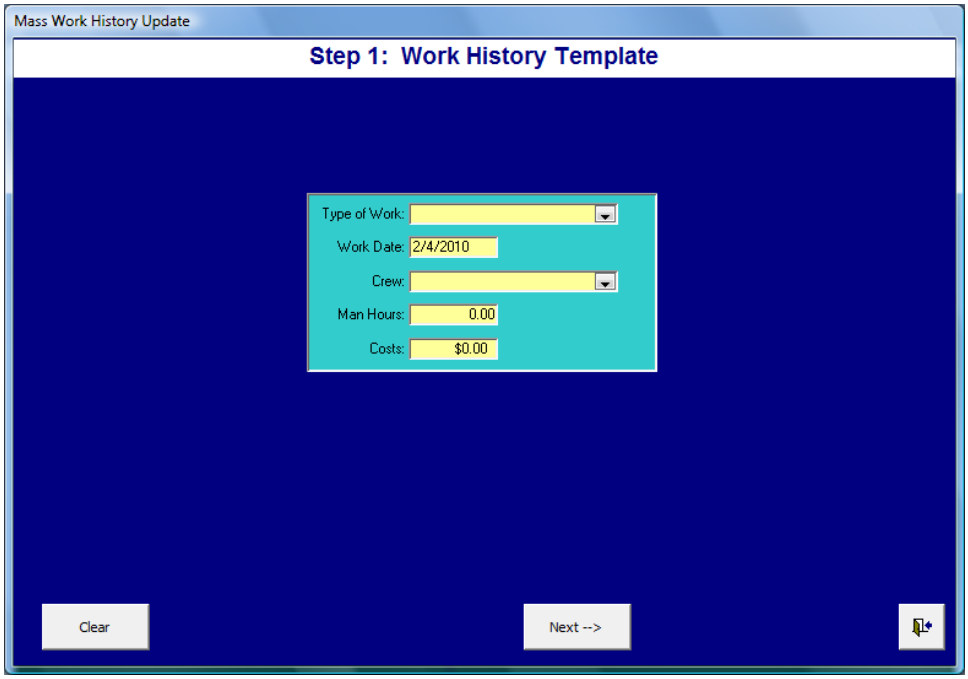
7.1 Mass Work History Update

If your municipality is like most, you perform routine maintenance on your trees. But it would be a seriously tedious process to update Tree Tracker one tree at a time if you just finished pruning an entire block side or neighborhood, or just finished a major planting project.

The Mass Work History Update utility allows you to create work histories for a large group of individual trees/sites at once. It is a three-step process that you will describe now.

7.1a Step 1: The Work History Template

When you click on the “Mass Work History Update” button on the Utilities menu, this screen will appear:



From this screen you select the type of work and the date that work was performed, the crew who performed the work and the number of man hours and costs per tree/site associated with the work.

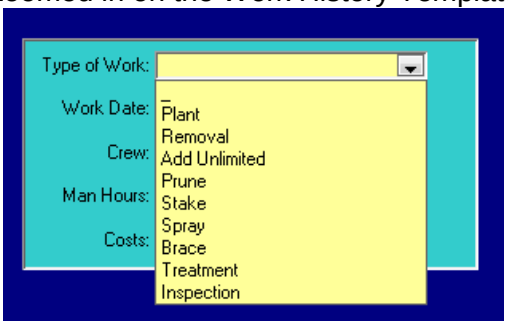
NOTE

Do not worry if every tree/site matches the items you enter in the Work History Template.

You will have the opportunity to change any/all of the selected information for individual trees/sites in Step 3: Review / Adjust Histories.

The first step is to select the type of work that was performed. When you click on the "Type of Work" drop-down arrow, this list appears:

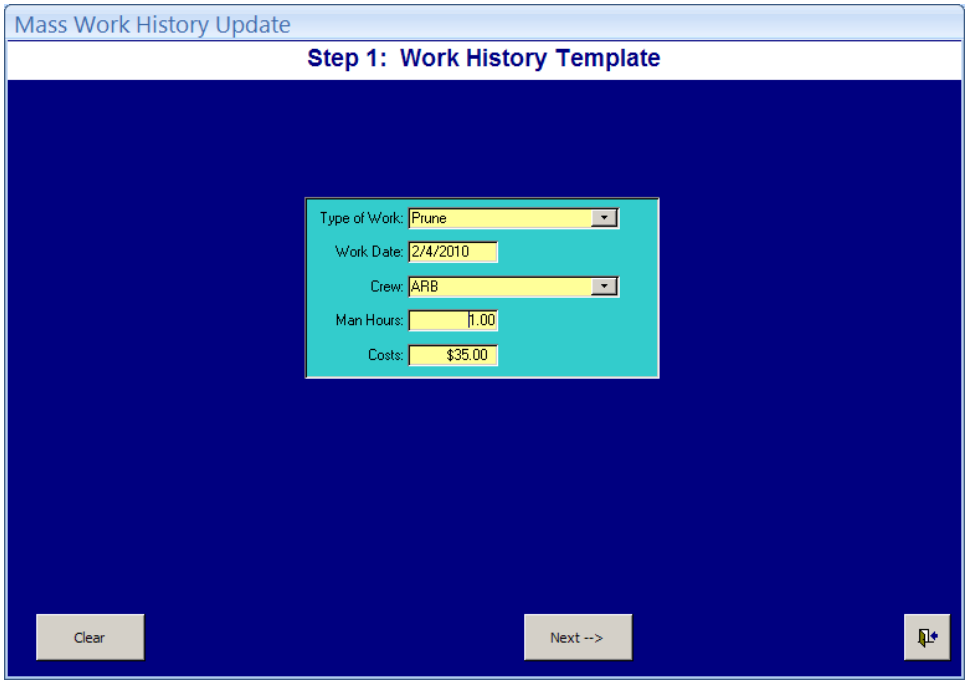
(Zoomed in on the Work History Template)



This list of work types is maintained in the Work Types Lookup Table. Go to section 5.3t: Work Types Lookup Table to learn more about it, or go to section 5.2: Adding, Editing and Deleting Items in a Lookup Table to learn more about managing the items on this list.

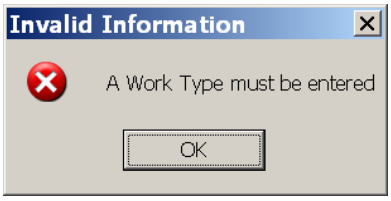
The Crew List is maintained in the Crew Codes Lookup Table. Go to section 5.3u: Crew Codes Lookup Table to learn more about it, or go to section 5.2: Adding, Editing and Deleting Items in a Lookup Table to learn more about managing the items on this list.

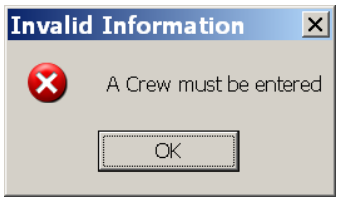
For example, let's say that the work crew (with the crew code of ARB) just performed a routine pruning that took about one hour per tree at a cost of roughly $35 per tree. The screen will look like this:

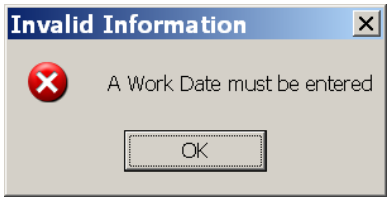


At this point you are finished with step 1 and can either click "Clear" to erase all of the selections and start again, click the exit button to abandon the process and exit the utility, or click "Next" to advance to step 2.

You do not have to enter man hours or costs in order to advance to step 2. You do need to enter the type of work, work date and crew. If you accidentally forget to enter these, you will get these error messages:

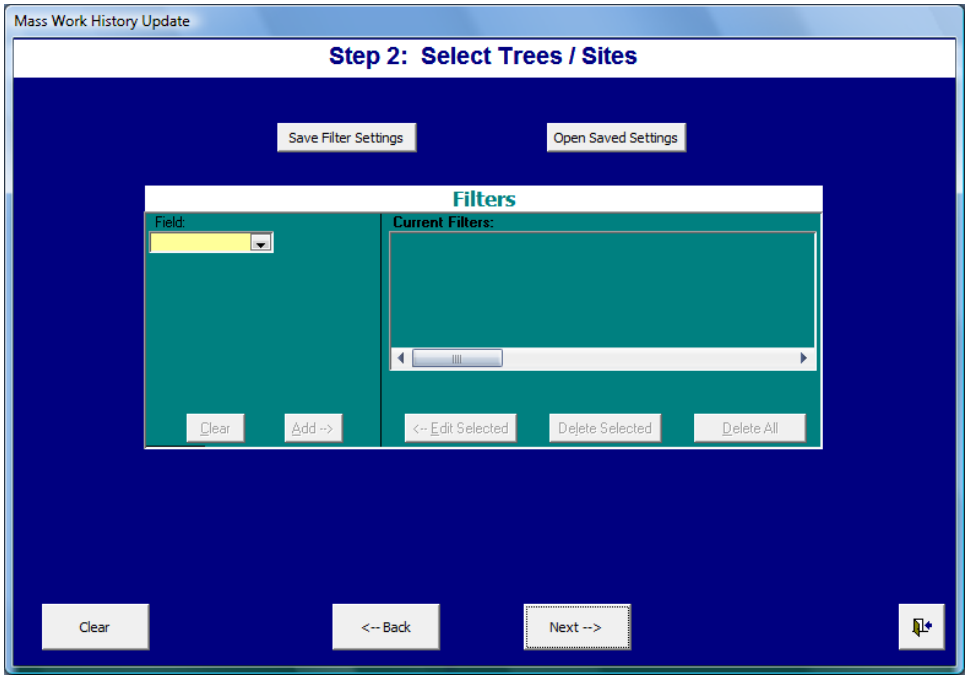






7.1b Step 2: Select Trees/Sites

When you click “Next” in step 1, this screen will appear:



If this screen looks familiar, it should. It is the same as the Report Filters section of the Report Generator. We are not going to go through how to create filters here, but rather direct you to section 6.4: Report Filters if you need to learn more.

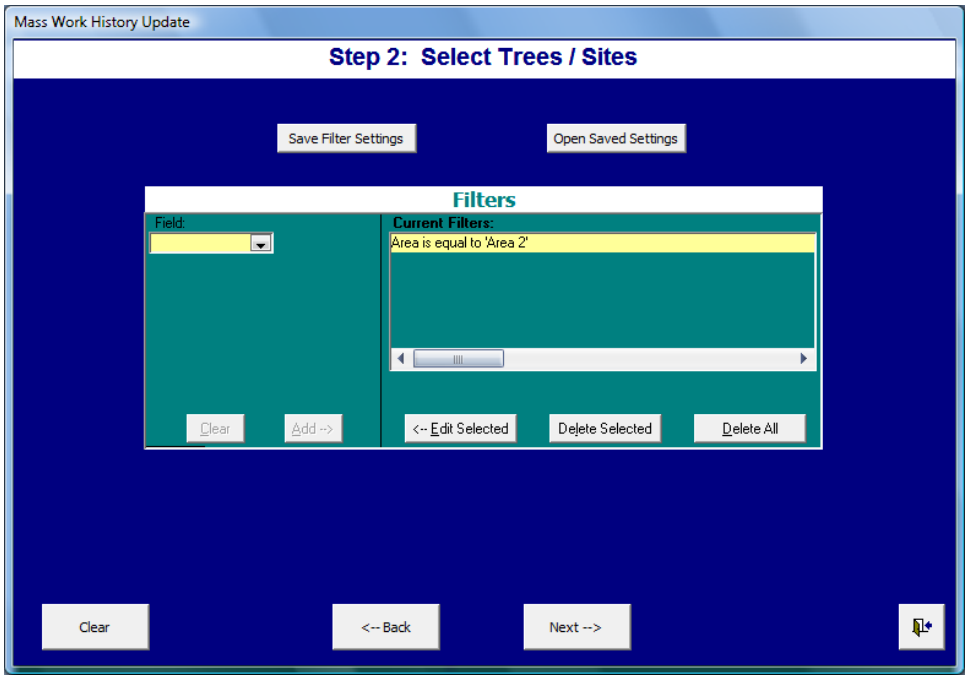
This is the step where you use filters to narrow your list of trees/sites that you are going to update with a work history. You can create multiple filters if necessary in order to fine tune the list of trees/sites.

IMPORTANT NOTE

Filters created and saved from the Site Reports group and Site Summary report of the Report Generator can be opened and used with the Mass Work History Update utility. In addition, this utility has the ability to share filters created and saved in it with the Site Reports group and Site Summary report.

Go to section 6.5a: Using Saved Report Settings with Other Reports to learn more about this.

In this example, let's say that the routine pruning was done in Area 2 only. You will create a filter to include trees/sites in area 2 only.



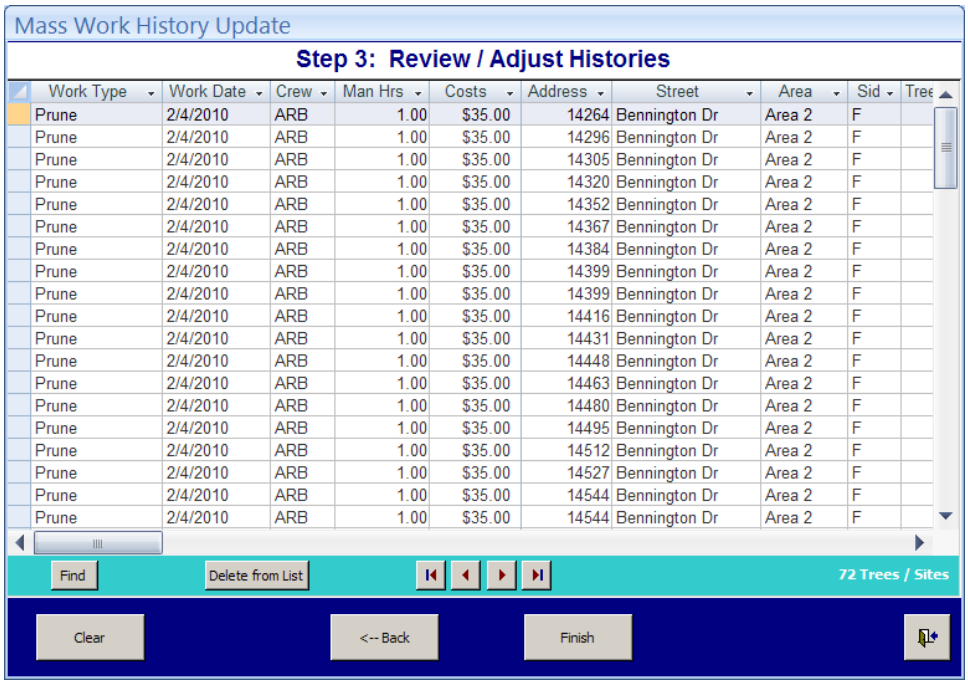
The "Save Filter Settings" and "Open Saved Settings" at the top of the screen are the same two buttons that appear in the Open / Save / Run section of the Report Generator. Go to section 6.5: Saving and Opening Report Settings to learn more.

Once you have added our filters, you are ready to go to step 3. You do not need to actually create a filter to get to step 3, but that would be impractical (otherwise you'd be doing a mass work history update for every tree/site in Tree Tracker!).

If you click "Clear" now, it will take you back to step 1 with no information entered. If you click "Back" now, it will take you back to step 1 with the information you entered still there for us to edit. You can also click the exit button to abandon the process and exit the utility. Otherwise, click "Next" to advance to step 3.

7.1c Step 3: Review / Adjust Histories

You've arrived at the final step in performing a Mass Work History Update. Here you will be able to fine tune what trees/sites get updated and also make changes to individual trees/sites' work history information if needed. The step 3 window looks like this:

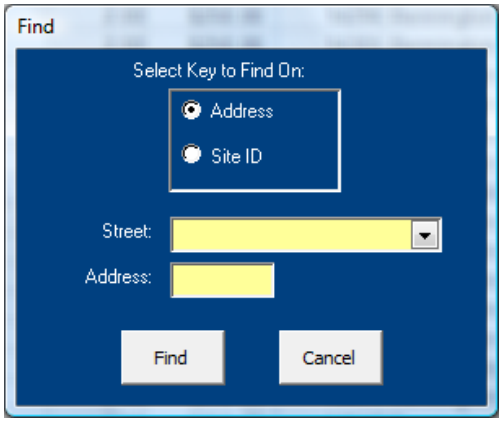


Work Type	Work Date	Crew	Man Hrs	Costs	Address	Street	Area	Sid	Tree
Prune	2/4/2010	ARB	1.00	$35.00	14264	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14296	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14305	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14320	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14352	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14367	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14384	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14399	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14399	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14416	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14431	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14448	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14463	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14480	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14495	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14512	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14527	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14544	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14544	Bennington Dr	Area 2	F	

You'll notice that the first five columns of this screen coorespond to the work history information you entered in step 1. Also, the trees/sites being shown are all in Area 2 based on the filter you added in step 2. At the bottom right of the screen, it tells you that there are 72 trees/sites in this list.

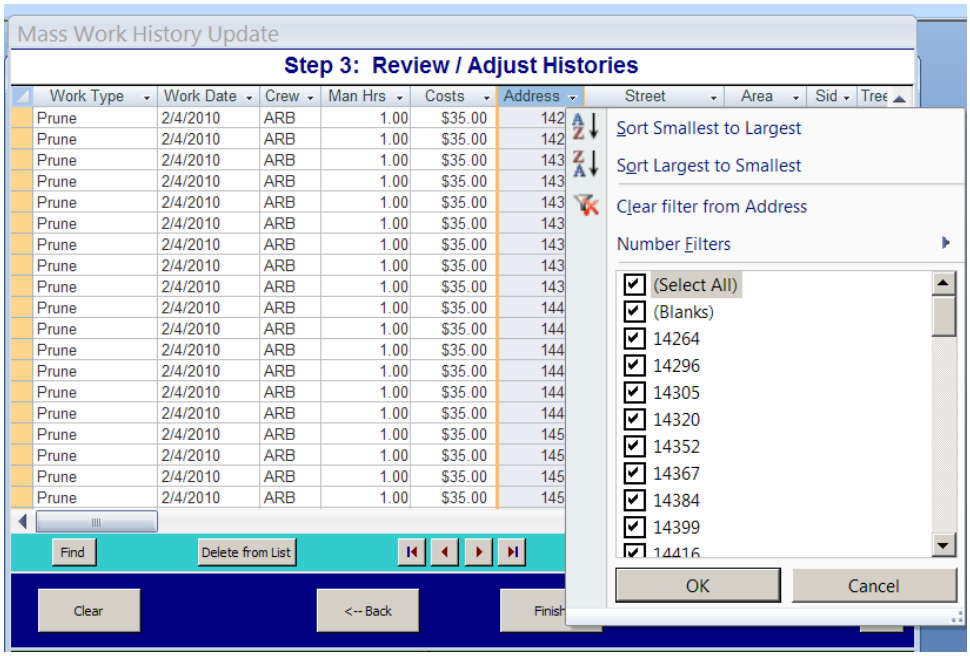
Finding and Sorting Trees/Sites

There are several ways to find and organize trees/sites on the list. If you have a large list of trees/sites to update, and you need to find one in particular, you can use the "Find" button to help you find it faster. When you click "Find", it will bring up this window:



You can search for the tree/site by either its address or site ID. To learn more about the "Find" button, go to section 4.4b Using the "Find" Button.

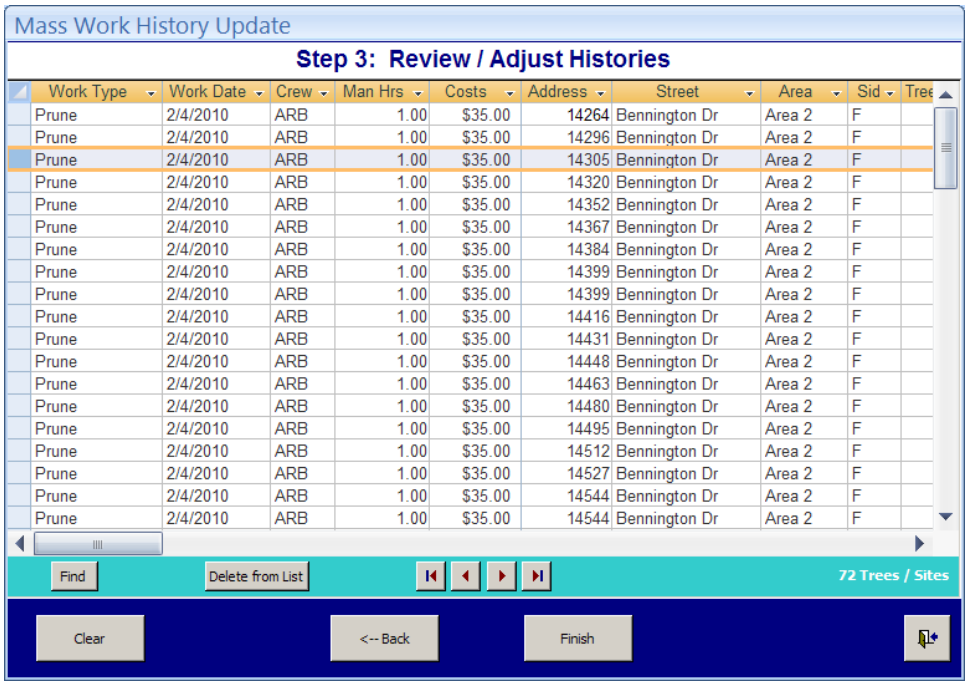
There are also other ways to sort and find trees/sites on the list. You can use the scroll bar at the right or you can use the navigation buttons (**|◄**, **◄**, **►** and **►|**). You can sort each column by clicking on the drop-down arrow next to the title of the column, then choosing from the displayed options. In the example below, we've clicked on the Address column header and get options to sort from smallest to largest, largest to smallest, filter to see only certain addresses, etc.



We suggest you experiment with clicking on the different column headers and choosing different sort options to see what they do.

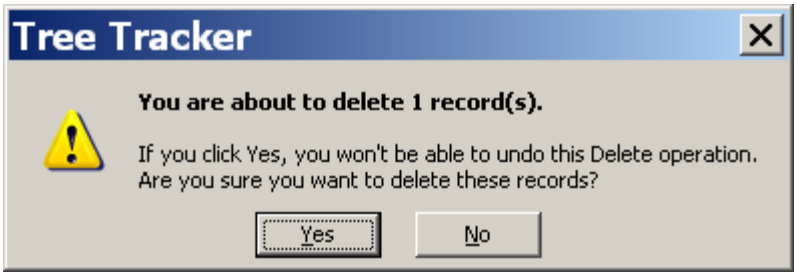
At this point, you can make changes as needed. Let's say that you know that no tree was actually pruned at 14305 Bennington Drive because of some issue, but every other tree around it did was pruned. You need to remove the tree/site at 14305 Bennington Drive from the list.

You can select that that tree/site by clicking on its far left column (an empty grey block). It will then highlight the row and will look like this:



Work Type	Work Date	Crew	Man Hrs	Costs	Address	Street	Area	Sid	Tree
Prune	2/4/2010	ARB	1.00	$35.00	14264	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14296	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14305	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14320	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14352	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14367	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14384	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14399	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14399	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14416	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14431	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14448	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14463	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14480	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14495	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14512	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14527	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14544	Bennington Dr	Area 2	F	
Prune	2/4/2010	ARB	1.00	$35.00	14544	Bennington Dr	Area 2	F	

You now click “Delete from List” to remove it from the list. When you do so, this warning comes up:



You click “Yes” to remove the tree/site from the list of trees/sites that will have a work history added for them, or click “No” to abandon deleting the tree/site from the list.

IMPORTANT NOTE

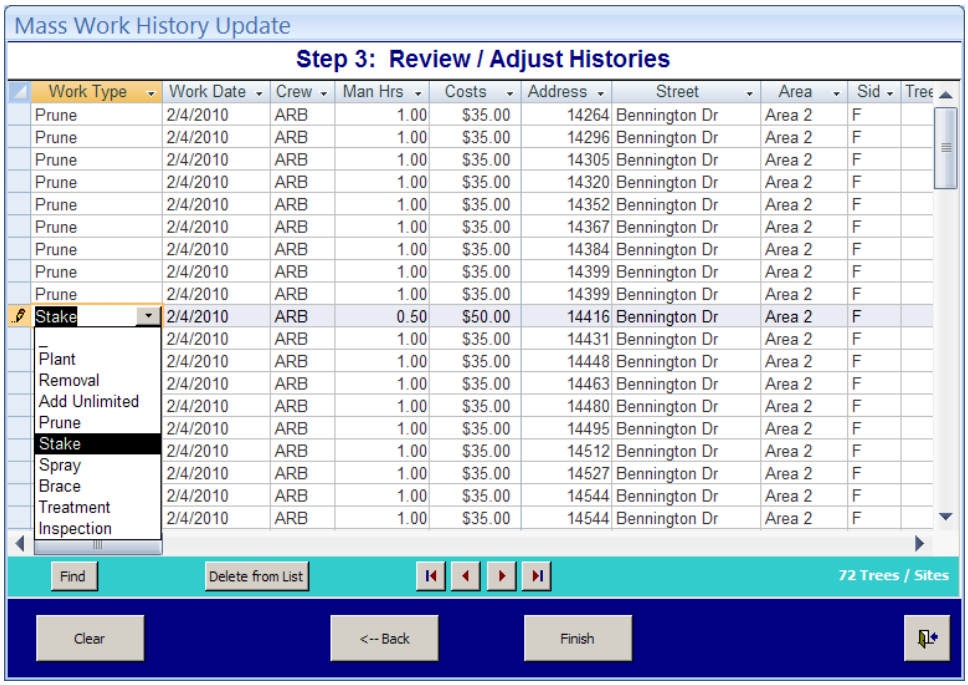
Remember that you are **NOT** deleting the tree/site from Tree Tracker!

You are just deleting it from the list of trees/sites that are going to have their work history updated.

You can also change individual trees/sites’ work history information in step 3. Let’s say that you know that at 14416 Bennington Drive, the tree didn’t need pruning, but did need bracing. The crew perfromed the bracing and reported that it took ½ an hour at an estimated

cost of $50. You can make changes to that individual tree so that it will show an accurate work history for it.

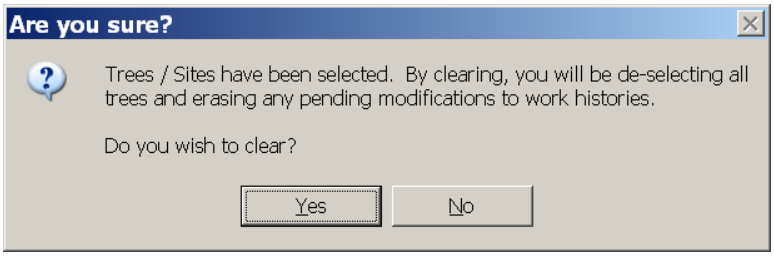
To change the date, man hours and costs, you can click on the appropriate cell and type in the correct date or number. To change the work type or crew, when you click on the appropriate cell, you get a drop-down arrow in the cell. Click on the drop-down arrow to get a list of items (work types or crew codes) from which to choose. In the example below, changes to the man hours and costs columns have already been made, and we have clicked on the work type cell for 14416 Bennington Drive. We've also clicked the drop-down arrow to see the list of work types from which to choose.



Note: The only columns that you can make changes to in step 3 are the ones associated with work histories (the first five columns). You can see more about each tree/site in other columns and even click on drop-down arrows to see other options for that cell, but you cannot make changes. You can, however, sort and filter our list by any columns.

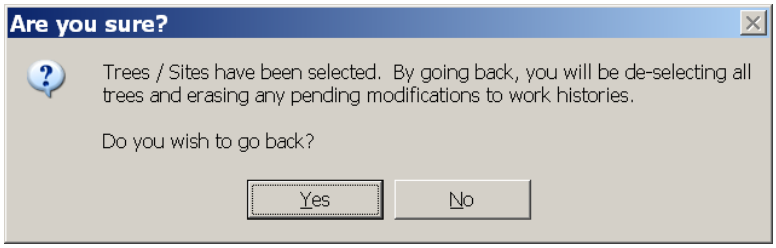
When you have finished making all of the changes to individual tree/site work histories and have deleted trees/sites that you do not want to have a work history added to, you are ready to complete the process.

If you click "Clear" now, you will get this message:



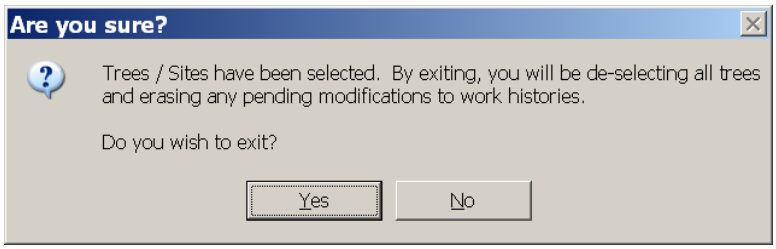
Click “Yes” to abandon the process and return to step 1 or click “No” to return to step 3.

If you click “Back” now, you’ll get this message:



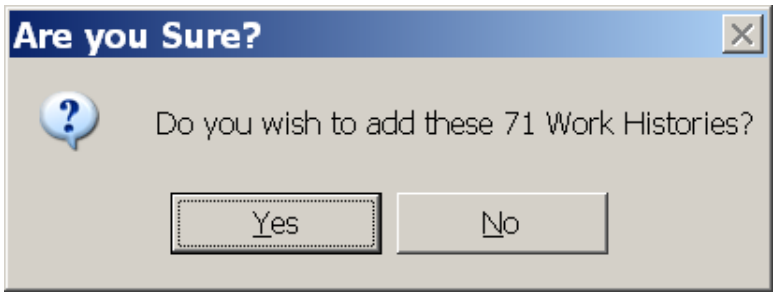
Click “Yes” to go back to step 2 where you can edit filters if necessary, or click “No” to return to step 3.

If you click the exit button now, you’ll get this message:



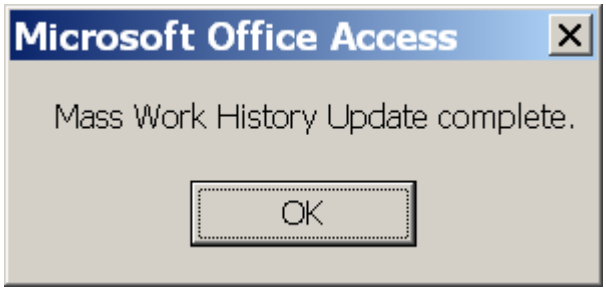
Click “Yes” to abandon the process and exit the utility or click “No” to return to step 3.

Once you are satisfied with the list and its contents, you click “Finish". When you do so, this screen will appear:



Click “Yes” to finish the process and add the work histories or click “No” to return to step 3.

When you click “Yes’” you will get this confirmation message:



You have now completed a mass update of work histories. The newly added work histories will appear on the Site Form with their tree/site, and on reports.

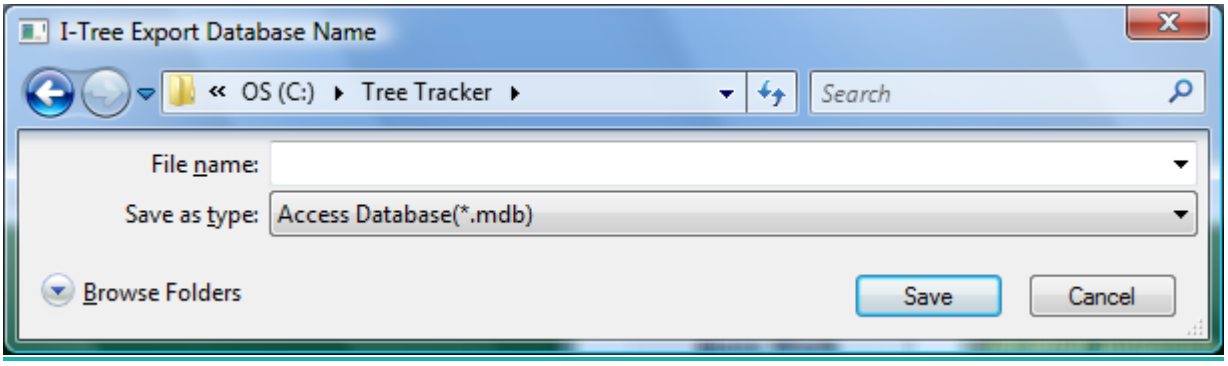
7.2 Export Site Data to i-Tree Streets

You can export your Tree Tracker database to be used with i-Tree software.

i-Tree is a state-of-the-art, peer-reviewed software suite from the USDA Forest Service that provides urban forestry analysis and benefits assessment tools. Street tree populations are assessed using i-Tree Streets, a street tree management and analysis tool for urban forest managers. i-Tree Streets uses tree inventory data (from programs like Tree Tracker) to quantify the dollar value of annual environmental and aesthetic benefits: energy conservation, air quality improvement, carbon dioxide reduction, storm water control, and property value increase.

For more information on i-Tree Streets, visit their site at:
http://www.itreetools.org/street_trees/introduction_step1.shtm

When you click on the "Export Site Data to i-Tree Streets" button, this window will be displayed (it may look different depending on what version of Windows you are running):

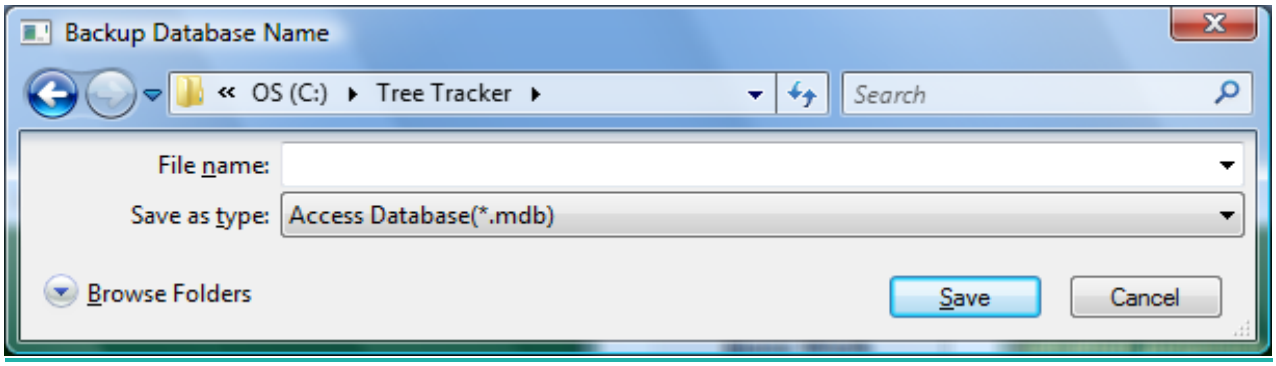


You will need to enter a name for the database and choose a location to save it. The file will be saved as an Access Database (.mdb) file. Click "Save" to finish or "Cancel" to abandon exporting the database.

7.3 Backup Database

With anything you do on a computer, it is always important to regularly backup your data, no matter how valuable it is. In the unlikely case your database becomes corrupt, you have a backup to which you can go. It is also wise to store the backup data on a different computer or storage media in case the computer(s) you are using fails.

When you click on the "Backup Database" button, this window will be displayed (it may look different depending on what version of Windows you are running):

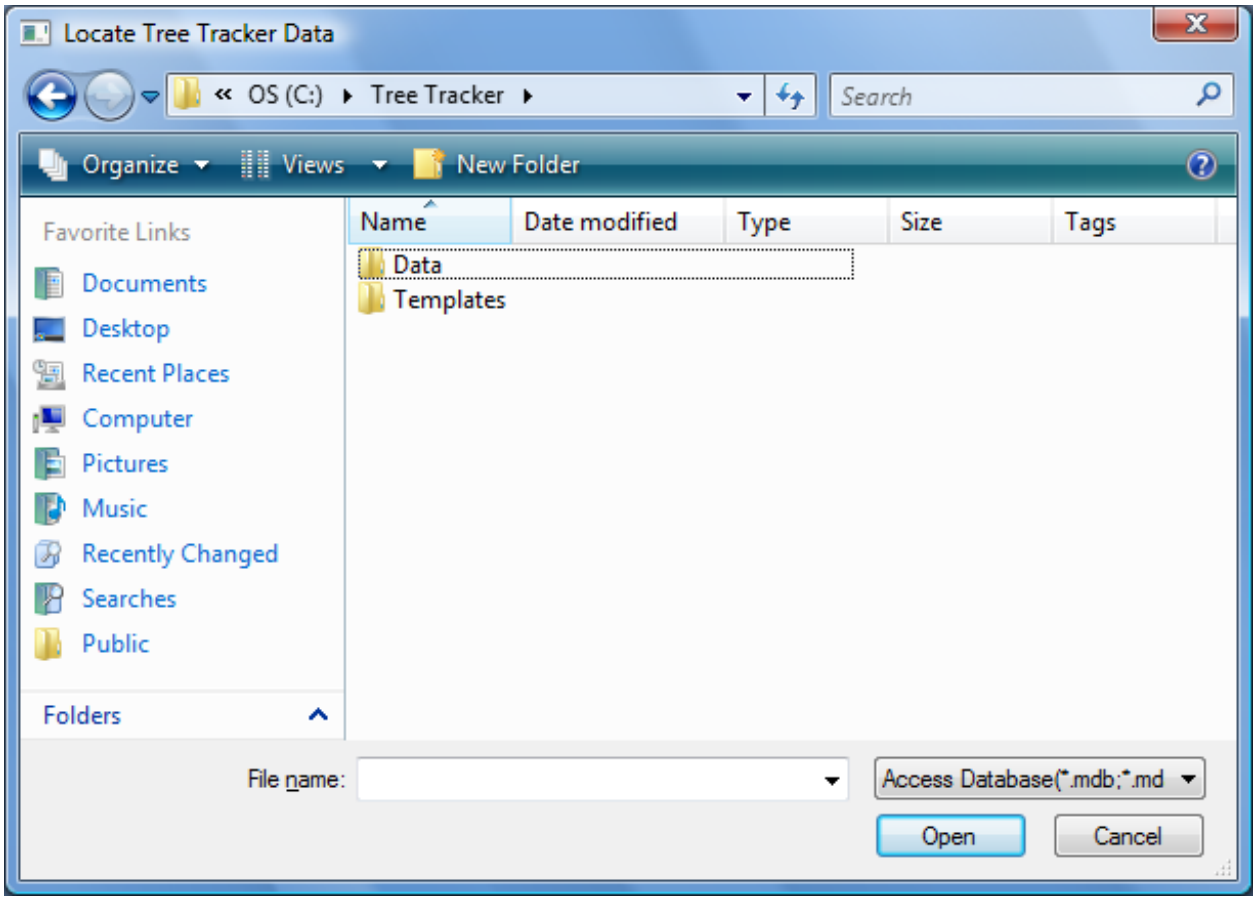


You will need to enter a name for the backup database and choose a location to save it. The file will be saved as an Access Database (.mdb) file. Click "Save" to finish or "Cancel" to abandon backing up the database.

7.4 Relink Data

In the unlikely event that Tree Tracker is unable to find the main database file (Tree Tracker Data.mdb), you can click on "Relink Data".

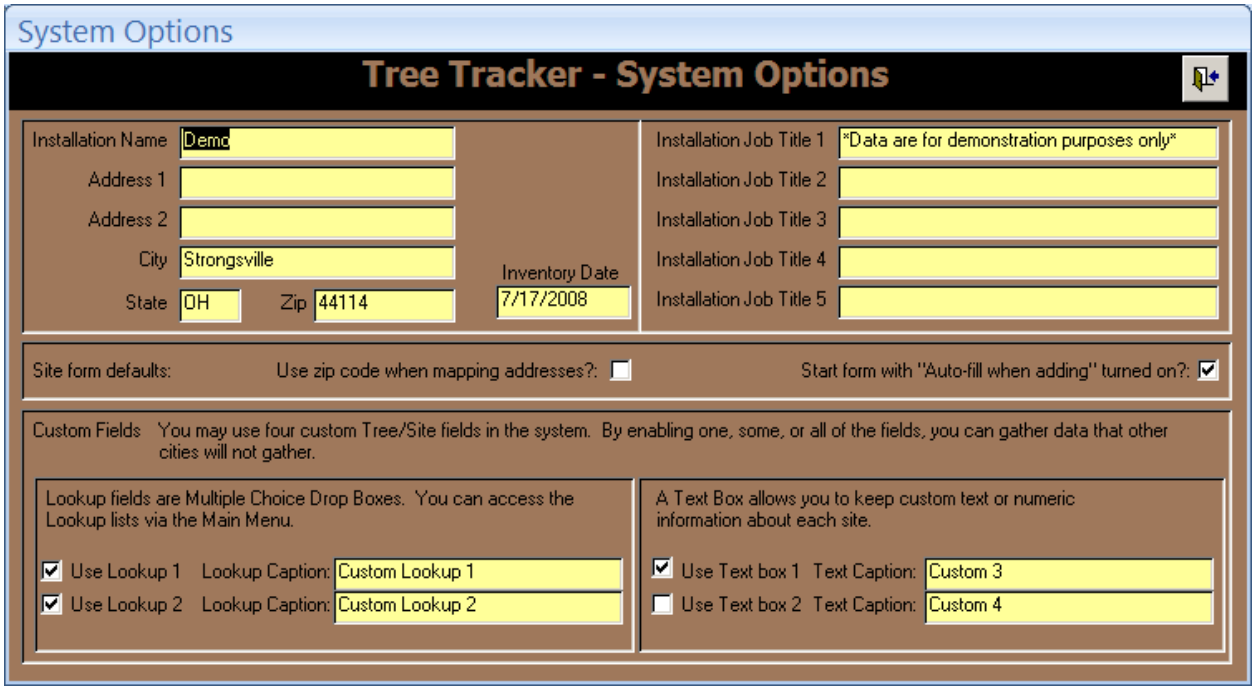
When you click on the "Relink Data" button, this window will be displayed (it may look different depending on what version of Windows you are running):



Find the location of the main database file (Tree Tracker Data.mdb), highlight it and click "Open" to relink Tree Tracker to it. Click "Cancel" to abandon relinking data.

7.5 System Options

When you click on "System Options", this window will appear:



7.5a Installation Title Information

Installation Name (REQUIRED)	Typically the name of the forestry office or organization. The name appears on the main menu and all reports.
Address (Optional)	Typically the address of the forestry office user's agency.
City/State/Zip (REQUIRED):	These are also used in mapping addresses from the Addresses section of the Site Form. • This software uses Google Maps® to display address on a map. These fields, along with the street and address are what make up the information Google Maps® requires.
Installation Job Title 1-5 (Optional)	Appears on the main menu. Suggested entries would be a secondary installation name, department name, and key personnel's' names and job titles.

7.5b Site Form Defaults

Use zip code when mapping addresses?	Check this box if your city falls within one zip code. If your city has multiple zip codes, do not check this box.
Start form with “Auto-fill when adding” turned on?	When on the Site Form, if Auto-fill when adding is checked, Tree Tracker will automatically copy the current tree/site’s information to the new tree/site being added so that you can change only the information that is different about the new tree/site. If it is not checked, the new record starts blank. This check box in the system setup screen tells the Site Form what the default setting should be.

7.5c Custom Fields

By enabling these four custom fields, you can add two more lookup table fields and two more text fields (256 characters maximum for each) to your tree inventory. When the checkbox to the left of the custom field is checked, the custom field is enabled throughout Tree Tracker.

7.5d Lookup Captions / Text Captions for Custom Fields

These are the user-defined field names that appear with the custom fields throughout Tree Tracker.

7.5e The Difference Between Lookup and Text Custom Fields

With text custom fields, you can type anything that you want. With Lookup custom fields, you define a list of items that can be chosen from a drop-down box. When you enable a lookup custom field, it then appears on the Lookup Tables Menu accessed via the main menu. From there you can define what items are valid for this custom field.

IMPORTANT NOTE	Because Lookup and Text captions will also be used as column titles on reports, the names should be kept as brief as possible.

8. Appendix 1: Site Form Field Definitions and Default Items

NOTE

For those fields that come with default items:

Your version of Tree Tracker may come with more default items in the lookup tables depending on what customization was done for your municipality.

The lists that follow reflect the default items that *normally* come with Tree Tracker.

8.1 Addresses Section Field Definitions

Field Name	Definition
Address	The numerical street number of the address.
Street	Choose the proper street name from the drop-down box. • The master list of streets is maintained in the Streets Lookup Table. You must go to the main menu, select "Lookup Tables", and then select "Streets" in order to add, edit or delete street names. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3a: Streets Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.
Assigned?	In locations where the address number is either not posted or not available, a check in the Assigned box indicates that the address has been assigned. These assigned addresses can be determined by using opposite or parallel addresses.

8.2 Service Requests Section Field Definitions

Field Name	Definition
Caller Name	Caller's name (first and last).
Caller Address	Caller's address (address number and street name). This can be left blank if the caller's address is the same as the address for the request.
Phone # 1	Caller's phone number (with area code).
Phone # 2	Caller's secondary phone number (with area code).
Received Date	Date the request is received. • By default, the current date will automatically be entered, but can be changed if necessary. The date should be entered as MM/DD/YY or MM-DD-YY. You can also choose to select a date from the calendar icon next to the date box.

Received By	Choose the initials of the staff person who received the call from the drop-down box. • The master list of staff initials is maintained in the Staff Lookup Table. You must go to the main menu, select "Lookup Tables", and then select "Staff" in order to add, edit or delete staff initials. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3p: Staff Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.
Request	Choose the type of service the caller is requesting from the drop-down box. • If you want to add, edit or delete items in the master list of services that can be requested, you must do so in the Request Types Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Request Types" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3v: Request Types Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Fertilize — Caller is requesting fertilization Inspect — Caller is requesting an inspection Plant — Caller is requesting a tree to be planted Prune — Caller is requesting tree pruning Removal — Caller is requesting tree removal Stake — Caller is requesting tree straightening Stump — Caller is requesting stump removal Train — Caller is requesting tree training
Priority	This is a number that you assign to each service request to rate its priority compared to other service requests. As an organization, you should decide before using Tree Tracker what scale you'd like to use. For example, you can choose a scale of 1 to 4, with one being high priority and 4 being low priority. Or you might choose a scale from 1 to 10. It's up to your organization how you would like to do it. • You must enter a priority number. This field cannot be left blank. • The priority number will be used when you run reports on service requests so that your organization can determine which service requests need to be acted on first.
Inspect Date	Date an inspection is made. • The date should be entered as MM/DD/YY or MM-DD-YY. You can also choose to select a date from the calendar icon next to the date box.

Inspect By	Choose the initials of the staff person who performed the inspection from the drop-down box. • The master list of staff initials is maintained in the Staff Lookup Table. You must go to the main menu, select "Lookup Tables", and then select "Staff" in order to add, edit or delete staff initials. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3p: Staff Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.
Resolve Date	Date the service request is resolved. • The date should be entered as MM/DD/YY or MM-DD-YY. You can also choose to select a date from the calendar icon next to the date box.
Caller Comments	This is an unlimited text box where any additional caller comments can be entered.
Inspector Comments	This is an unlimited text box where any additional staff comments can be entered.
Request ID	This is a system-generated unique identifier for each service request. It is automatically created by Tree Tracker and is not entered by the user.

8.3 Trees / Planting Sites Section Field Definitions

8.3a Block/Location/Inventory Fields

Field Name	Definition
On Street **From Street** **To Street** **Side**	Choose the proper block side from the drop-down box. These four fields make up the block side, and use only a single drop down-box to access the Block Side master list. • The master list of block sides is maintained in the Block Sides Lookup Table. You must go to the main menu, select "Lookup Tables", and then select "Block Sides" in order to add, edit or delete street names. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3b: Block Sides Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.

Side of Lot

Choose the side of the lot where the tree/site is located from the drop-down box.

- If you want to add, edit or delete items in the master list of names of the sides of the lot, you must do so in the Side of Lot Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Side of Lot" in order to add, edit or delete items in this master list.
- Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table.
- Go to section 5.3i: Side of Lot Lookup Table to learn more about this lookup table.

Default Values That Come With Tree Tracker

Default Item	Definition
Front	Tree/site is located at the front of the address
Park	Tree/site is located in a park
Rear	Tree/site is located at the rear of the address
Side	Tree/site is located at the side of the address
Median/Island	Tree/site is located on a median or island

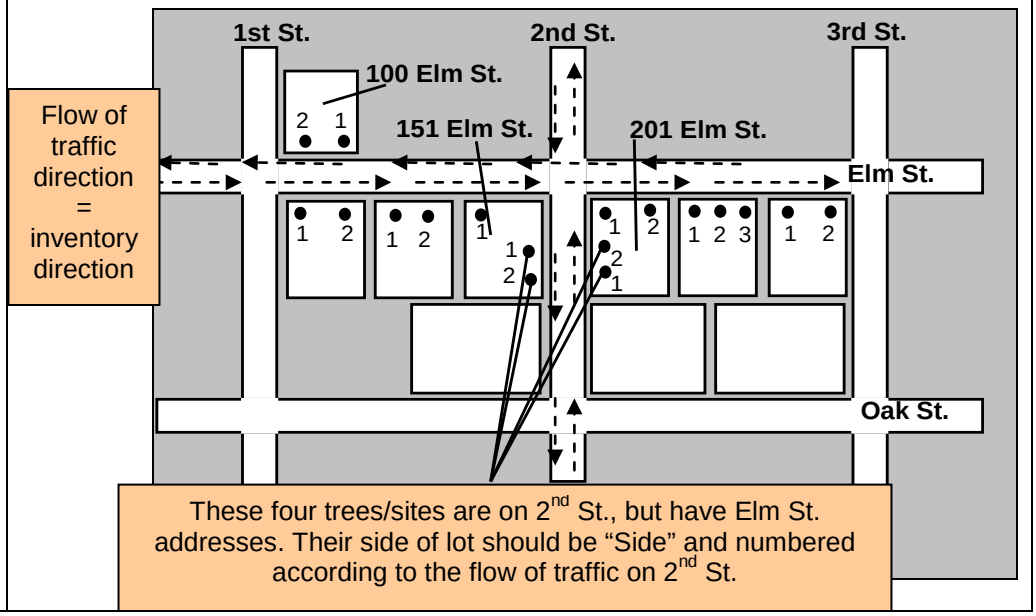
Tree #

Individual trees/sites at every address will be assigned a unique tree number. Individual trees/sites are inventoried and assigned numbers sequentially in the direction of vehicular traffic flow.

At each address, a separate number sequence is used for each side of lot (front, side, rear, park and median/island). This means that the trees at the front may be numbered 1 through 999 and, if trees are located on the side, rear, or median/island of that same address, each side is also numbered consecutively, again beginning with the number 1 and always in the direction of vehicular traffic flow.

In the case of one-way streets, trees/sites are collected and assigned tree numbers as if they were two-way streets.

The following diagram gives you a little more detail on how tree/site numbering progresses as you move along a street:



Area	Choose the management area where the tree/site is located from the drop-down box. A management area is a distinct geographical section of a municipality. These areas could be things like quadrants, wards, precincts, zones and subdivisions. • If you want to add, edit or delete items in the master list of management areas, you must do so in the Management Areas Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Management Areas" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3e: Management Areas Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Area 1 — Generic name for a zone or area whose name can be edited to the user's preference Area 2 — Generic name for a zone or area whose name can be edited to the user's preference Area 3 — Generic name for a zone or area whose name can be edited to the user's preference Area 4 — Generic name for a zone or area whose name can be edited to the user's preference
Managed By	Choose the management entity from the drop-down box. Typically, the management entity is city, private, both or unknown. • If you want to add, edit or delete items in the master list of management entities, you must do so in the City Managed Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "City Managed" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3f: City Managed Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** City — Tree/site on city right-of-way Private — Tree/site off city right-of-way Both — Tree/site on city right-of-way line Unknown — Unknown right-of-way

Location	Choose the type of location where the tree/site exists from the drop-down box. Examples include tree lawns, medians, parks and yards, but any location description can be added. • If you want to add, edit or delete items in the master list of names of location types, you must do so in the Location Types Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Location Types" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3g: Location Types Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Median/Island — Tree/site is on a median or island Other Maintained — Tree/site is on maintained natural area Other Unmaintained — Tree/site is on unmaintained natural area Treelawn — Tree/site is on a treelawn Well/Pit — Tree/site is in a tree well or tree pit Yard — Tree/site is in a residential area with no walks
Land Use	Choose the type of land utilization from the drop-down box. Typical examples include residential, industrial, parks, schools, shopping, etc. • If you want to add, edit or delete items in the master list of names of land uses, you must do so in the Land Uses Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Land Uses" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3h: Land Uses Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Industrial — Tree/site is in an industrial area Park/Open Space — Tree/site is in a park or open area Residential — Tree/site is in a residential area Shopping/School — Tree/site is in a commercial or school area
Inventory Date	Date the tree/site was inventoried. • The date should be entered as MM/DD/YY or MM-DD-YY. You can also choose to select a date from the calendar icon next to the date box.

Inventory By	Choose the initials of the staff person who performed the inventory from the drop-down box. • The master list of staff initials is maintained in the Staff Lookup Table. You must go to the main menu, select "Lookup Tables", and then select "Staff" in order to add, edit or delete staff initials. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3p: Staff Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.
Project	Choose the name of a project title from the drop-down box. For example, if there is a specific project that is being undertaken, such as a fall planting, Tree Tracker allows you to associate a tree/site to that project. • If you want to add, edit or delete items in the master list of names of projects, you must do so in the Projects Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Projects" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3d: Projects Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.

8.3b Tree Attributes Fields	
Field Name	**Definition**
Species	Choose the inventoried species or site type (stump, planting site, shrub, etc…) from the drop-down box. • If you want to add, edit or delete items in the master list of species or site types, you must do so in the Species Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Species" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3c: Species Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	A large default list of species comes in this lookup table with Tree Tracker.

Maintenance: Priority	Choose the maintenance priority of the tree/site from the drop-down box. Maintenance priorities are used to determine the order in which work needs to be done based on the condition of the tree/site. • If you want to add, edit or delete items in the master list of maintenance priorities, you must do so in the Maintenance Priority Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Maintenance Priority" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3j: Maintenance Priority Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Critical — Highest priority maintenance need Immediate — High priority maintenance need N/A — Not applicable or is a planting site Routine — Routine priority maintenance need Young — Routine priority maintenance need for young trees
Maintenance: Type	Choose the maintenance type of the tree/site from the drop-down box. • If you want to add, edit or delete items in the master list of maintenance types, you must do so in the Maintenance Type Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Maintenance Types" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3k: Maintenance Type Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Clean — ANSI A300 pruning standard Plant — Planting site Raise — ANSI A300 pruning standard Remove — Remove tree Stump — Remove Stump Thin — ANSI A300 pruning standard Train — ANSI A300 pruning standard

Condition: Wood	Choose the condition of the wood at the tree/site from the drop-down box. • If you want to add, edit or delete items in the master list of condition types, you must do so in the Condition Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Condition" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3l: Condition Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Dead/Dying — Tree is dead or is a stump Fair — Tree is in fair functional health Good — Tree is in good functional health N/A — Not applicable or is a planting site Poor — Tree is in poor functional health
Condition: Leaves	Choose the condition of the leaves at the tree/site from the drop-down box. • If you want to add, edit or delete items in the master list of condition types, you must do so in the Condition Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select Condition in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3l: Condition Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Dead/Dying — Tree is dead or is a stump Fair — Tree is in fair functional health Good — Tree is in good functional health N/A — Not applicable or is a planting site Poor — Tree is in poor functional health
Diameter	Enter from 1 to 999 the diameter at breast-height (DBH).

Failure Size	Choose the range (in inches) of the largest section of a tree that is likely to fail from the drop-down box. • If you want to add, edit or delete items in the master list of failure size ranges, you must do so in the Failure Size Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Failure Size" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3m: Failure Size Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** 00-03 — Diameter in inches of tree part most likely to fail 04-12 — Diameter in inches of tree part most likely to fail 13-24 — Diameter in inches of tree part most likely to fail 25-36 — Diameter in inches of tree part most likely to fail 37+ — Diameter in inches of tree part most likely to fail N/A — Not applicable or is a planting site

8.3c Site Attributes Fields	
Field Name	**Definition**
Wires	Choose yes or no as to the presence of wires from the drop-down box. The Wires List can be modified to reflect high voltage, low voltage, both or none, or any other value if needed. • If you want to add, edit or delete items in the master list of wire conditions, you must do so in the Wires Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Wires" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3n: Wires Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Yes — Overhead wires are present No — Overhead wires are not present

Hardscape Damage	Choose yes or no as to the presence of hardscape damage from the drop-down box. The Hardscape Damage List can be modified to indicate the type of hardscape damage if needed. • If you want to add, edit or delete items in the master list of hardscape damage, you must do so in the Hardscape Damage Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Hardscape Damage" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3o: Hardscape Damage Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Yes — Damaged curb or sidewalk No — No damage
Root Space	Enter from 1 to 99 the narrowest restriction in feet.

8.3d Custom Attributes Fields

NOTE

These fields only appear if they have been enabled in the system options section.

See section 7.5c: Custom Fields of this User Guide to learn more about enabling custom fields.

Field Name	Definition
Custom Lookup 1	This list is whatever the user defines it as. Choose from the drop-down box an item from the user-created list. • The user-defined master list is maintained in the Custom Lookup 1 Lookup Table**. You must go to the main menu, select "Lookup Tables", and then select "Custom Lookup 1"** in order to add, edit or delete items in the user-defined list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3r: Custom Lookup 1 Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.

Custom Lookup 2	This list is whatever the user defines it as. Choose from the drop-down box an item from the user-created list. • The user-defined master list is maintained in the Custom Lookup 2 Lookup Table**. You must go to the main menu, select "Lookup Tables", and then select "Custom Lookup 2"** in order to add, edit or delete items in the user-defined list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3s: Custom Lookup 2 Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.
Custom Text Box 1	This is an open text field where you can enter whatever user-defined information is needed.
Custom Text Box 2	This is an open text field where you can enter whatever user-defined information is needed.

IMPORTANT NOTE

**The title of these custom fields, lookup tables and text boxes are user-defined and can be changed.

The default names appear above, but will change in Tree Tracker as you rename the title for each custom field.

8.3e Observations / Notes / Other Fields

Field Name	Definition
Observations	Choose the observations that are present at this tree/site from the drop-down box. You can select multiple items from this list. • If you want to add, edit or delete items in the master list of observations, you must do so in the Observations Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Observations" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3q: Observations Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Remove Hardware — Staking or guying material needs to be removed Mulched Improperly — Tree has been improperly mulched Planted Improperly — Tree has been improperly planted Pruned Improperly — Tree has been improperly pruned Pest Problem — Disease or insects are present Mechanical Damage — Tree has been damaged by mechanical equipment Cavity/Decay — Cavity or decay is present Root Problem — Root damage, girdling or decay is present Grate/Guard — Inspect grate/guard annually of girdling Poor Location — Not a good site for a tree Reinspect — Tree needs to be reinspected annually Underground Utilities — Underground utilities are present Memorial Tree — Tree has been planted in memory or dedication
Notes	This is an unlimited open text field where you can enter any notes associated with this particular tree/site.
Tree Value	Tree Tracker calculates tree value using the Trunk Formula Method, as outlined in *The Guide for Plant Appraisal (Ninth Edition, 2000),* written by the Council of Tree and Landscape Appraisers (CTLA) and published by the International Society of Arboriculture (ISA).

<table>
<tr>
<td>Risk Rating</td>
<td>
The risk rating is a feature of Tree Tracker that automatically calculates the relative risk of a tree/site based on the information provided in five different fields in the Trees/Sites section. The five fields are:

Land Use
Maintenance: Priority
Maintenance: Type
Condition
Failure Size

Each of these fields has its own corresponding lookup table where the master list of choices for that field is maintained. For each item choice on the master list, a risk rating has been assigned (usually on a scale of 0 to 4 with 4 being the highest risk). Tree Tracker totals up the risk rating number from all five fields to calculate a total risk rating. For example:
<table>
<tr><th>Field</th><th>Tree 1</th><th>Risk Rating</th><th>Tree 2</th><th>Risk Rating</th></tr>
<tr><td>Land Use</td><td>Park/Open Space</td><td>1</td><td>Shopping/School</td><td>4</td></tr>
<tr><td>Maintenance Priority</td><td>Immediate</td><td>3</td><td>Critical</td><td>4</td></tr>
<tr><td>Maintenance Type</td><td>Thin</td><td>1</td><td>Remove</td><td>4</td></tr>
<tr><td>Condition</td><td>Good</td><td>1</td><td>Dead/Dying</td><td>4</td></tr>
<tr><td>Failure Size</td><td>37+</td><td>4</td><td>25-36</td><td>4</td></tr>
<tr><td>Total Risk Rating</td><td></td><td>10</td><td></td><td>20</td></tr>
</table>
In this example, even though tree 1 has an immediate maintenance priority and is a big tree, it has a lower risk rating because it is in good condition in a park needing only to be thinned. Tree 2 is a big tree in a riskier place (a school), is dead or dying, and in critical need of being removed. It has the highest possible risk rating of 20 based on a scale of 0 to 4.
</td>
</tr>
<tr>
<td>Site ID</td>
<td>This is a system-generated unique identifier for each tree/site. It is automatically created by Tree Tracker and is not entered by the user.</td>
</tr>
</table>

8.4 Work Histories Section Field Definitions

Field Name	Definition
Type of Work	Choose the type of work that was performed by a crew from the drop-down box. • If you want to add, edit or delete items in the master list of types of work that were performed, you must do so in the Work Types Lookup Table. You'll need to go to the main menu, select "Lookup Tables", and then select "Work Types" in order to add, edit or delete items in this master list. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3t: Work Types Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	Default Item — **Definition** Fertilize — Tree was fertilized Inspect — Tree was inspected Plant — Tree was planted Prune — Tree was pruned Removal — Tree was removed Spray — Tree was sprayed Stake — Tree was staked Water — Tree was watered
Crew	Choose the crew code of the crew who performed the work from the drop-down box. • The master list of crew codes is maintained in the Crew Codes Lookup Table. You must go to the main menu, select "Lookup Tables", and then select "Crew Codes" in order to add, edit or delete staff initials. • Go to section 5.2: Adding, Editing, and Deleting Items in a Lookup Table to learn more about how to add, edit and delete items in a lookup table. • Go to section 5.3u: Crew Codes Lookup Table to learn more about this lookup table.
	Default Values That Come With Tree Tracker
	No default items come in this lookup table with Tree Tracker.
Man Hours	Enter the number of man hours it took to complete the work.
Cost	Enter the cost of the work completed.
Work ID	This is a system-generated unique identifier for each work history. It is automatically created by Tree Tracker and is not entered by the user.