Reports Mapping to Internet ID or Groups

Within the Enterprise Financial System (EFS), ChartField strings can be given descriptions and mapped to Internet IDs or groups. This feature makes it easier to locate, navigate, and run reports in the Reporting Center. Principal Investigators (PI) will automatically be mapped to a sponsored ChartField string. All other individuals or defined groups of individuals must be mapped to specific sponsored or non-sponsored ChartField strings. This job aid explains how to add descriptions and map ChartField strings in EFS.

Mapping ChartField Strings in EFS by Internet ID

Log in to MyU (myu.umn.edu). Navigate to: Key Links > PeopleSoft > EFS/Finance.

Navigate in EFS Finance: SUFSC Common Definitions > UM Chartfield Mapping by ID.

1. Enter the Internet ID or Empl ID of the individual that ChartField strings will be mapped to.
2. Click <Search>.

EDIT/DELETE/ADD CHARTFIELD STRINGS

3. Edit existing mapped ChartField strings by editing the Description or ChartField values displayed on a row. Note: Description is limited to 30 characters and will display on the PI/Internet ID mapped reports for the individual.
4. Delete a ChartField string by clicking <->.
5. Add a new ChartField string by clicking <+>. Note: Populate the newly added ChartField string by following the tips and tricks section of this job aid.
6. Click <Save>. 
Reports Mapping to Internet ID or Groups (cont.)

Mapping ChartField Strings in EFS by Group ID

Log in to MyU (myu.umn.edu). Navigate to: Key Links > PeopleSoft > EFS/Finance.

Navigate in EFS Finance: SUFSC Common Definitions > UM Chartfield Mapping by Group.

1. Click the Add a New Value tab.
2. Enter a short group name in Group ID.
3. Click <Add>.

4. Enter a long group name in Description.

5. Using Copy From Group in the Internet ID mapping allows for copying of an established set of ChartField string values and individuals from one Group ID to another Group ID. All values will be copied.

EDIT/DELETE/ADD CHARTFIELD STRINGS

6. Edit existing mapped ChartField strings by editing the Description or ChartField values displayed on a row. Note: Description is limited to 30 characters and will display on the PI/Internet ID mapped reports for the individual.

7. Delete a ChartField string by clicking <->.
8. Add a new ChartField string by clicking <++. Note: Populate the newly added ChartField string by following the tips and tricks section of this job aid.
9. In the Associate Internet ID section, add or delete group individuals.
10. Click <+> to add additional individuals to the group. For each added row, enter an Internet ID of the additional individual.
11. Click <-> to delete individuals from the group.
12. Click <Save>.

Tips and Tricks for Mapping

- To view mapped reports, see PI/Internet ID Mapped reports within the Reporting Center.
- Sponsored ChartField strings omit PCBU and Activity as they are inferred given the use of Project.
- Mapping Nuances to Fin EmplID/CF1, CF2
  - Enter Actual Value - Financial reports will display exact values:

```
<table>
<thead>
<tr>
<th>Description</th>
<th>*Fund Code</th>
<th>*DeptID</th>
<th>Program Code</th>
<th>Project</th>
<th>Fin EmplID</th>
<th>ChartField 1</th>
<th>ChartField 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fin Train - Administration</td>
<td>1000</td>
<td>100054</td>
<td>20004</td>
<td>1000000066</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

- Empty Fields - Financial reports will display ALL transactions regardless of the value entered or lack of value entered:

```
<table>
<thead>
<tr>
<th>Description</th>
<th>*Fund Code</th>
<th>*DeptID</th>
<th>Program Code</th>
<th>Project</th>
<th>Fin EmplID</th>
<th>ChartField 1</th>
<th>ChartField 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fin Train - Gen Ops</td>
<td>1000</td>
<td>100054</td>
<td>20004</td>
<td>1000000066</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

- Entry of the word (BLANK) - Financial reports will display transactions missing entry into the optional/conditional fields:

```
<table>
<thead>
<tr>
<th>Description</th>
<th>*Fund Code</th>
<th>*DeptID</th>
<th>Program Code</th>
<th>Project</th>
<th>Fin EmplID</th>
<th>ChartField 1</th>
<th>ChartField 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fin Train</td>
<td>1000</td>
<td>100054</td>
<td>20004</td>
<td>1000000066</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```