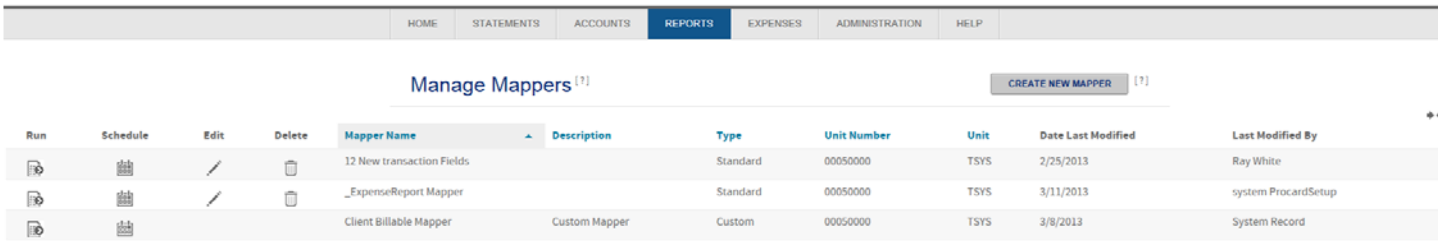
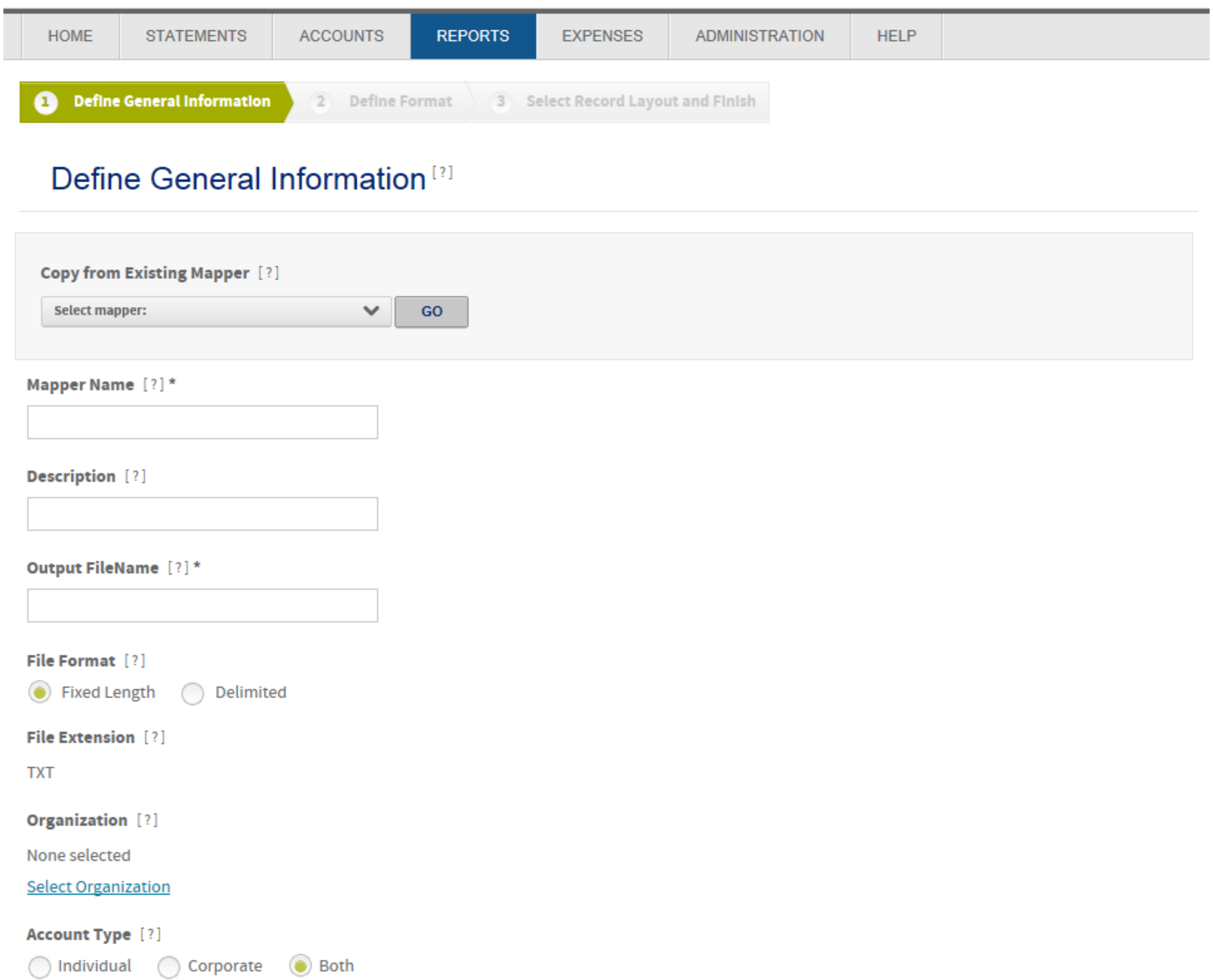
Data Mapping

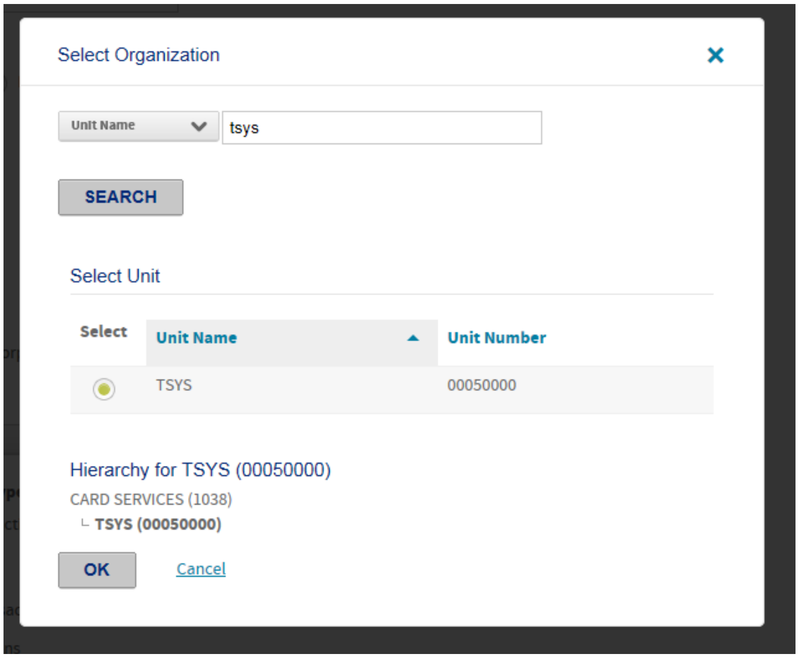
The data mapping tool will work much like it does today. Users will select Reports > Data Mapping to access their list of mappers, if applicable. Users will click on “Create New Mapper” to set up a new file format. Much like Standard Reports, new icons display in the list of existing mappers to Run, Schedule, Edit (if applicable) or Delete (if applicable) an existing mapper. Custom Mappers cannot be edited or deleted which follows current functionality.



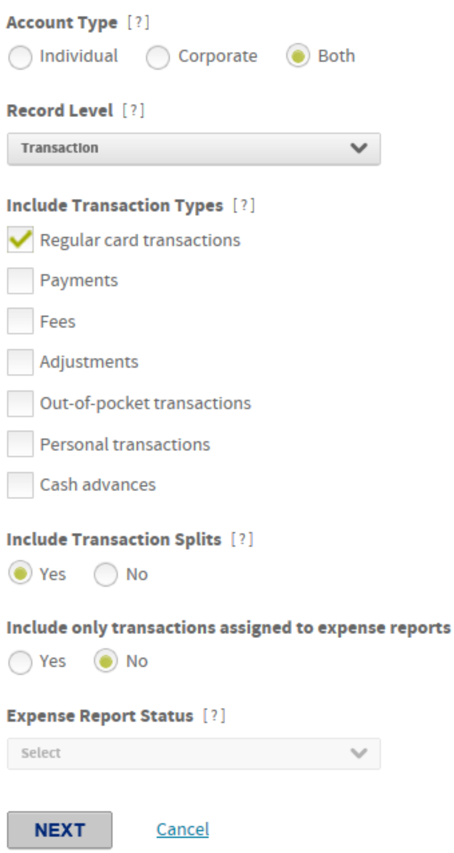
Users will define the General Information first including the mapper name, output file name, etc.



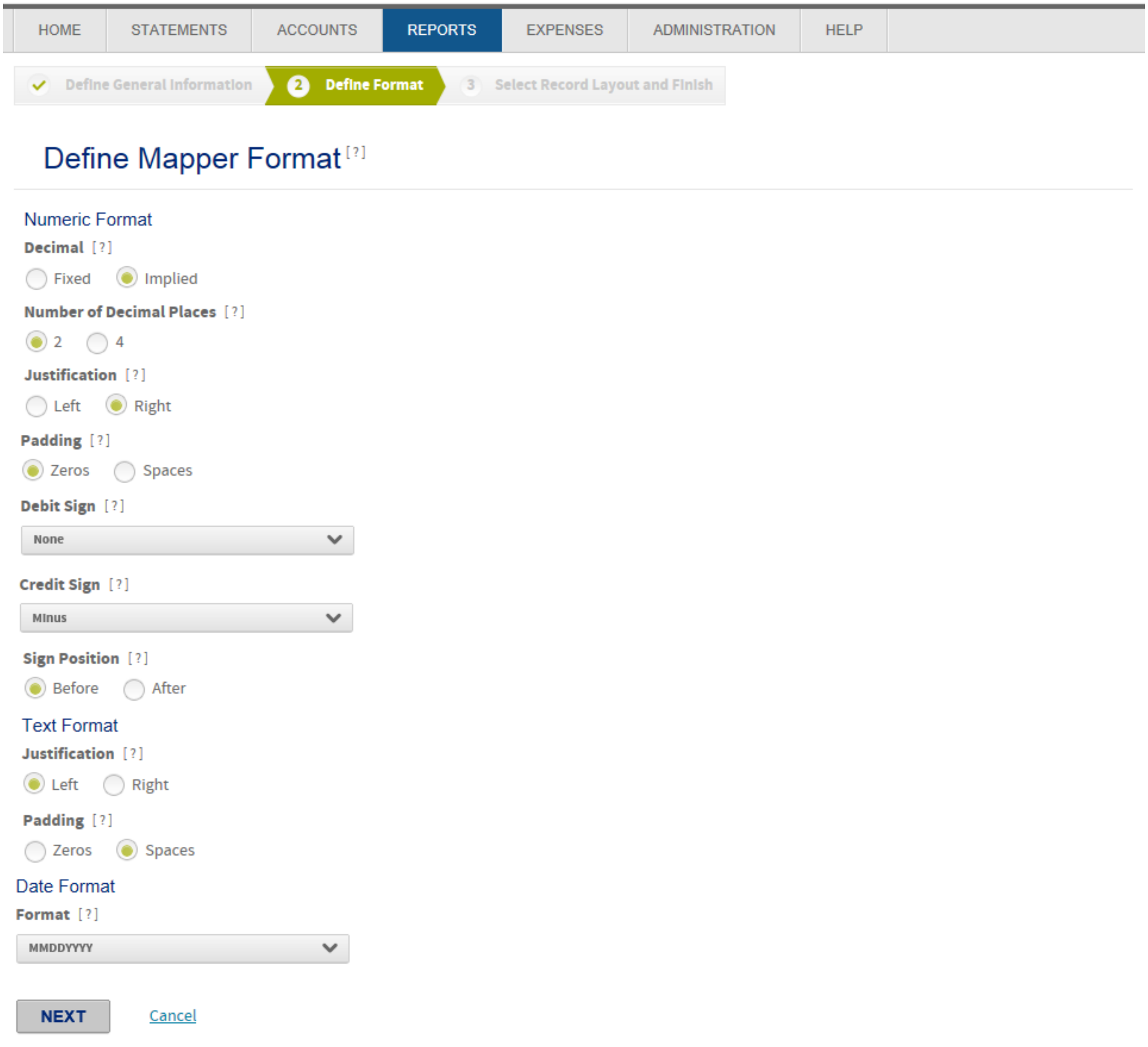
Click on the Select Organization link to select the unit the mapper will be run against. A popup will display for the user to search for and select the organization:



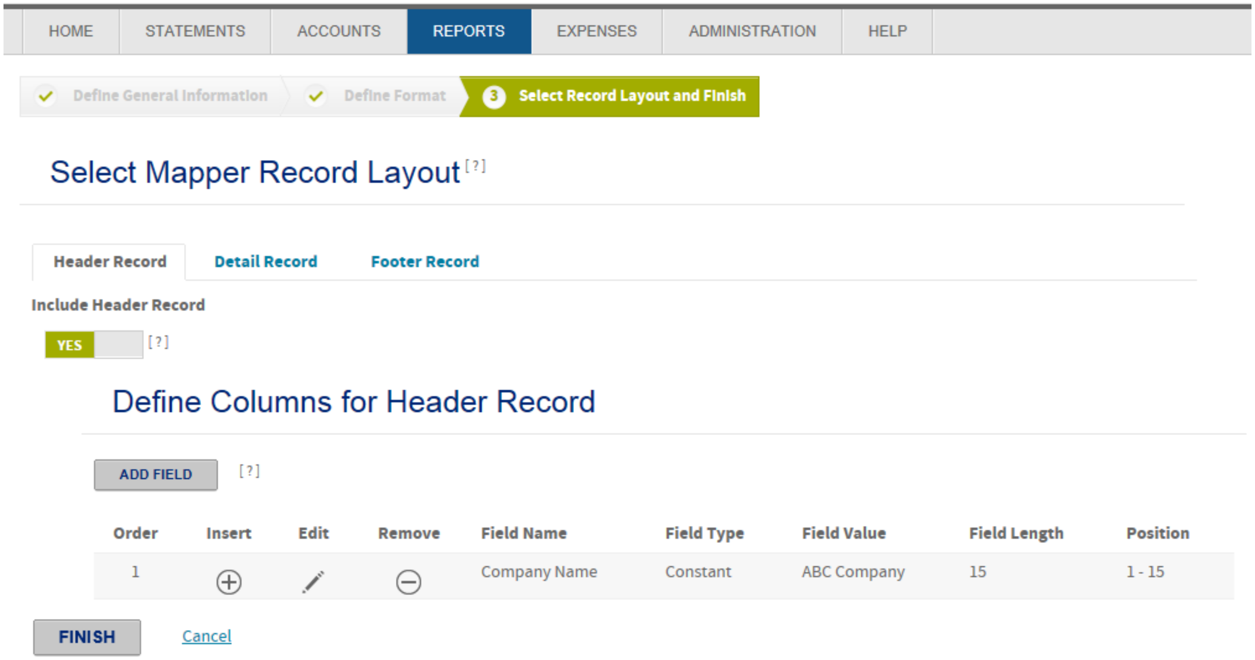
Users can then continue to select the record level, transaction types and, if using Expense Reports, expense report status options.



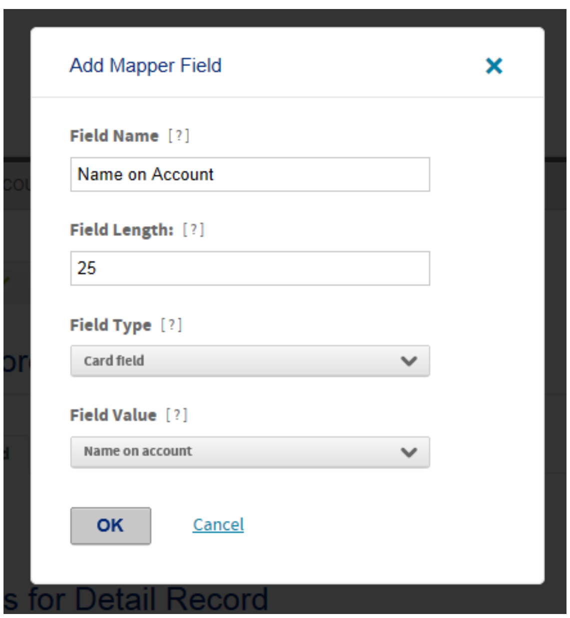
Click Next to continue to the second step to define numeric and date format options.



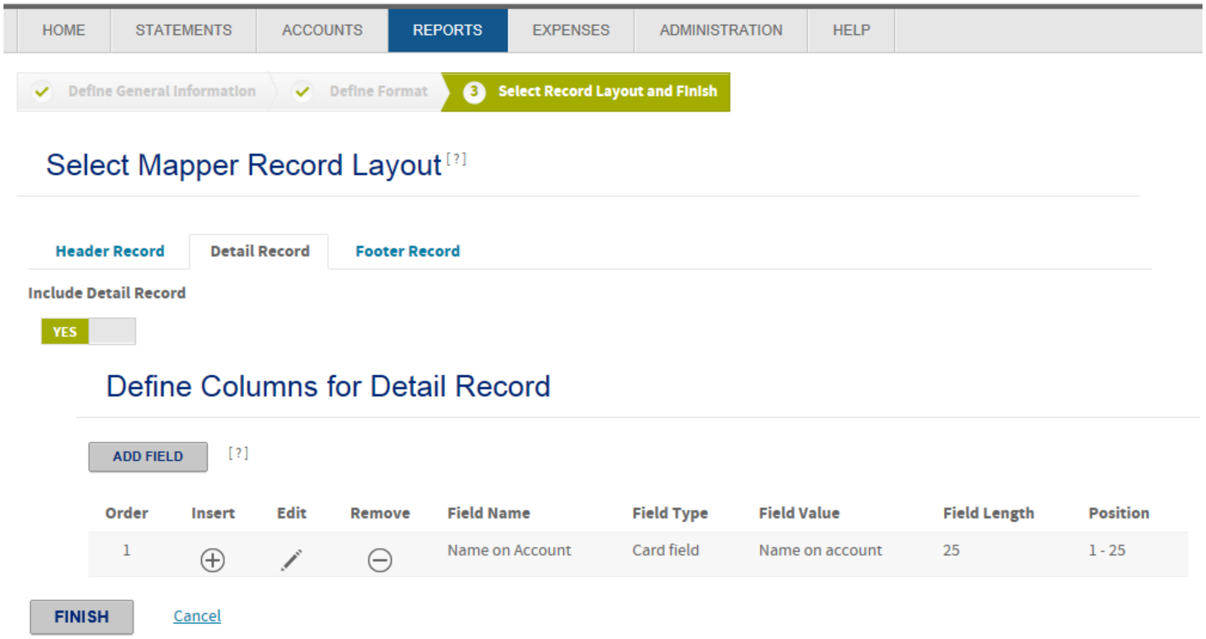
Click on Next to select and define each record layout including Header, Detail and Footer records. Each of these options will now display on separate tabs with the option to include the record layout or not. As shown below, the first option on the tab will allow the user to click on Yes to include the record layout. Once the record layout is enabled, users can begin adding in columns for the record.

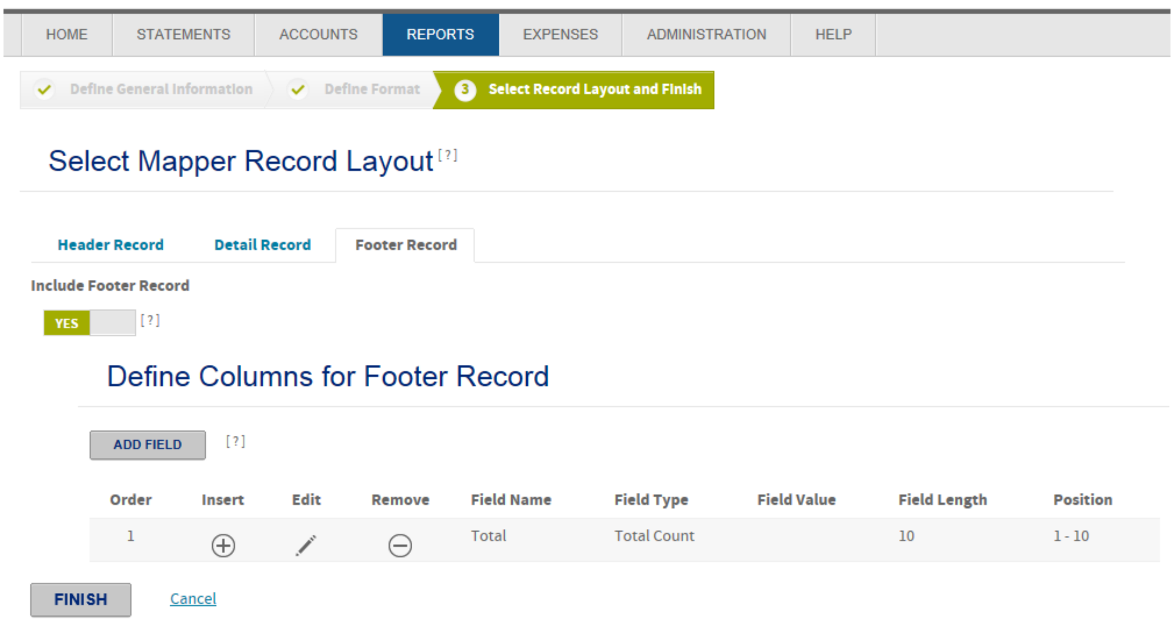


When users click on Add Field, a popup will display to define the column being added. Below is an example from the Detail Record:



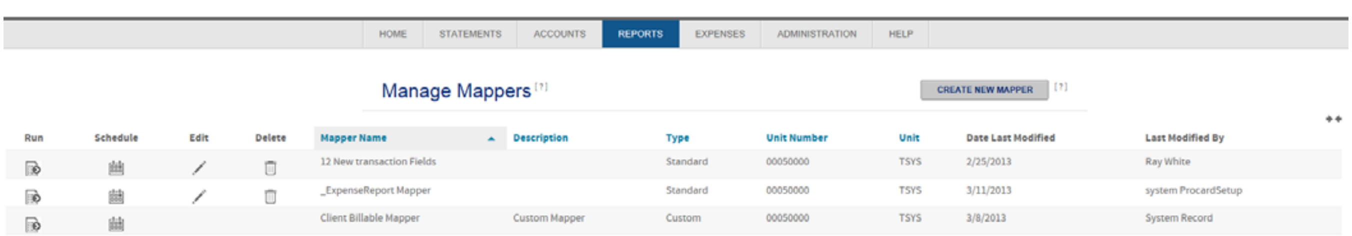
Users will click on each tab to define each record layout and the columns to be displayed. Once complete, users will click on Finish at the bottom of the screen to complete the process and save the new mapper. Below is a sample of a detail record and footer record:



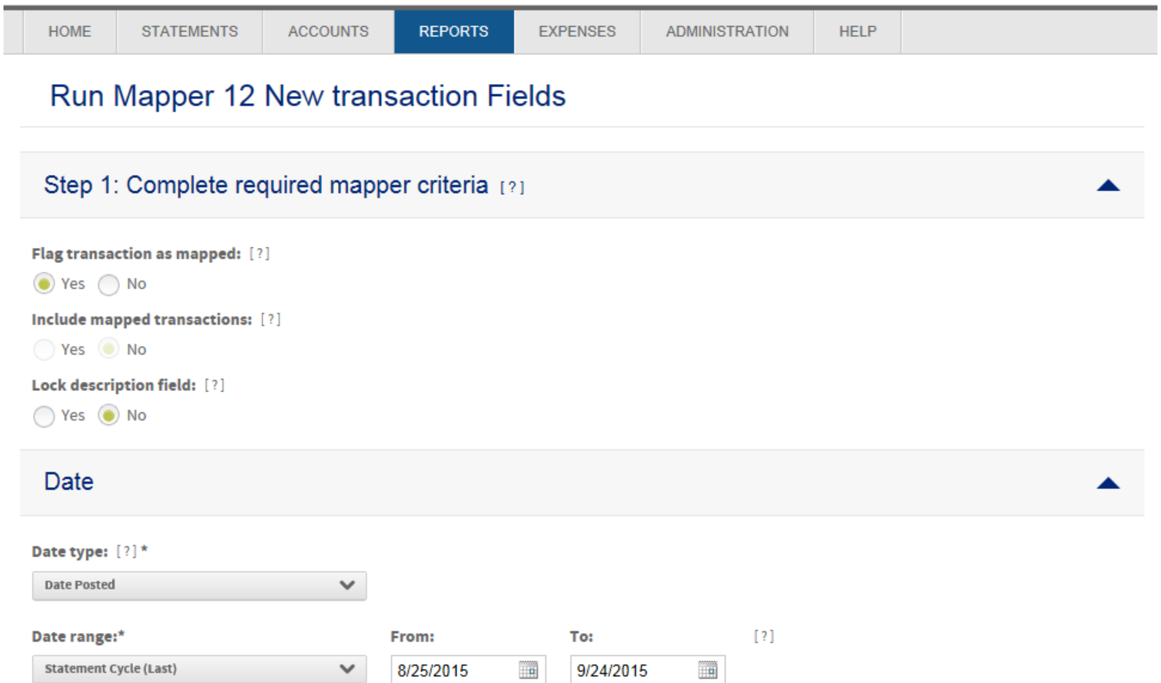


Run Mapper

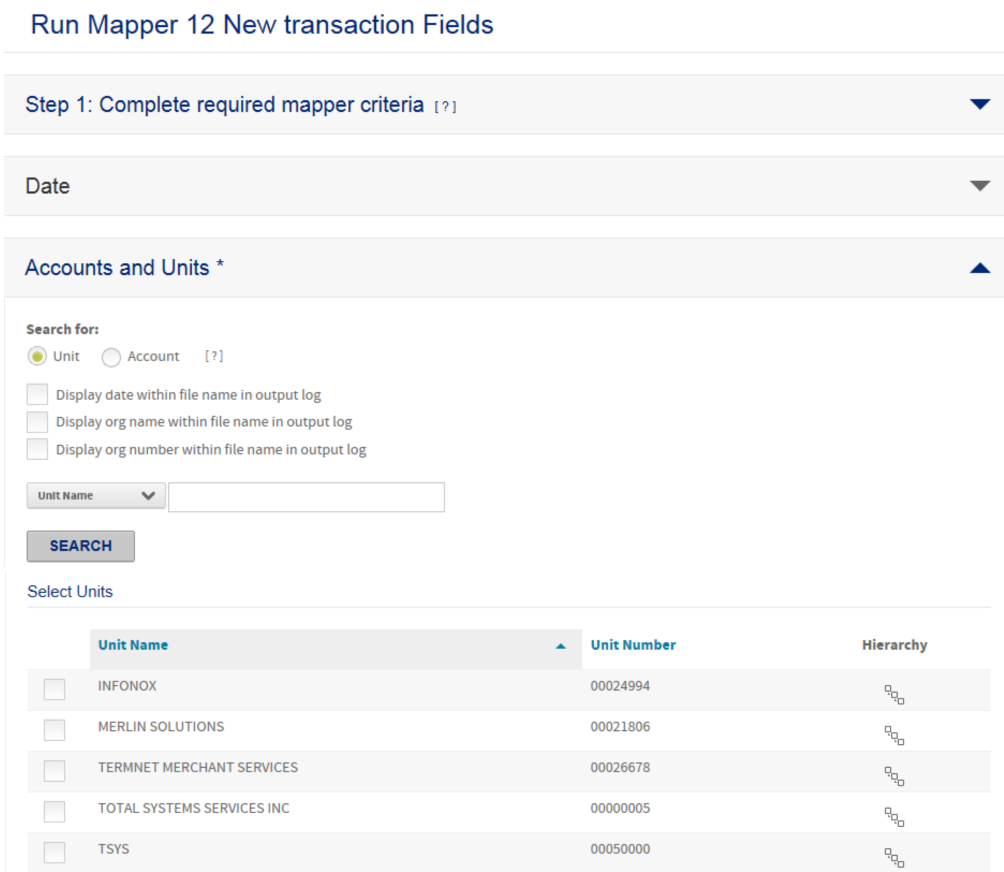
From the Manage Mappers screen, click on the Run icon to create the mapper output on demand:



The process will remain the same as it is today with users defining the mapper criteria and the date range:



Users will then select the accounts and/or units to be included:



Finally, users can set their file destination options and then click on Run to generate the file.