Create File Mapping

Purpose: Use this document as a reference to create a file mapping in PeopleSoft.

Audience: Campus Solutions Staff

⊘ The Create File Mapping and Edit File Mapping links are found on many process pages. No particular security roles grant access to these links across all pages; security access will vary depending on the user's access to the process page they are using.
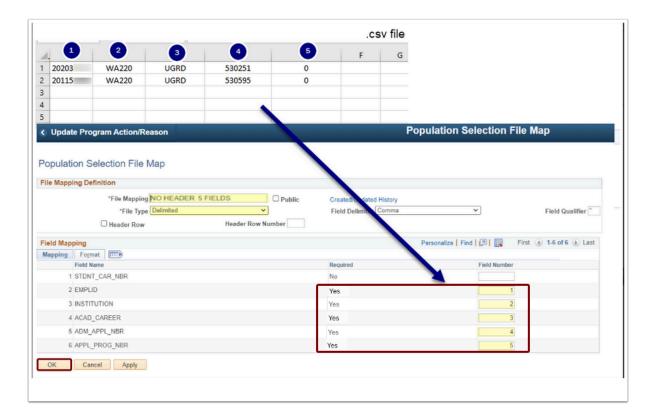
Please contact your local college supervisor or IT Admin to request role access if you need assistance with the above security roles.

ℹ • File mapping enables staff to set up a field-to-field mapping to load data from a Microsoft Excel file in .csv format.
  • To view existing File Mappings, select the File Mapping looking glass. There is no need to create a new file mapping if one exists that matches your file.

1. Format your Microsoft Excel file in .csv format. To Create a File Mapping, you **must include the process-specific required fields.** Identify required fields by taking the following steps:
   a. **Selection Tool**: External File
   b. Click the **Upload File** button and upload your saved Microsoft Excel file in .csv format (you may need to reformat your file if you do not have the required fields included in it).
   c. The **Attached File** displays.

2. After the Excel .csv file is uploaded, click the **Create File Mapping**link to create a new option.
   a. The **Population Selection File Map** page displays.

3. Enter a name in the **File Mapping** field (you can reuse this next time you run the process).
4. Verify that the **File Type** is **Delimited**.
5. Verify the **Field Delimiter** is **Comma**.
6. In the Field Mapping area, enter the **Field Number** that corresponds to the column number of your .csv file for the required fields (image below).
7. "Yes" displays in the Required column if the field name is required in your .csv file.
8. Click **Ok.**
9. Select **Preview Selection Results** to review the formatting of the upload file, ensuring no blank rows exist.
10. Select **Return** after viewing results.

11. Select the **Run** button at the top of the page to complete the desired process.