erwin Data Intelligence Suite

Reference Data Management Guide

Release v10.0

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Managing Reference Data

This section walks you through reference data and codeset management.

- Reference data management is done via Reference Data Manager. It enables you to create database like structure to maintain all your reference data. You can add reference data in a reference table from a spreadsheet, manually or via a DB scan. These reference tables can be validated using SQL queries for data quality tests. You can also version, publish (to environments like production, development, test etc.), and link the reference tables to relevant mappings.
- Codeset management is done via Codeset Manager. The Codeset Manager enables you to create, manage, and map codesets. It has two sections Enterprise Codesets and Codeset Mappings.
 - The Enterprise Codesets section enables you to import legacy codesets through its upload and database scanning capabilities. In this section, you can categories codesets, define code values, version codesets, and publish codesets to various environments.
 - The Codeset Mappings section enables you to create and manage code crosswalks (mappings). You can categorize code mappings, define code crosswalks, version code crosswalks, and publish code crosswalks to various environments.

Using Reference Data Manager

To access the Reference Data Manager, go to **Application Menu > Data Catalog > Refer**ence Data Manager. The Reference Data Manager dashboard appears:

orkspace	- Valida	tion Rule Grid								,			
Reference Datasets	Ð												
Audit History Validation Rules Environments	#	Validation Name	Validation Description	Created By	Created Date	Modified By	Modified Date	Validation Rule	Edit	Dele			
Reference Folders B EDW													
EON	1	EMPLOYEE MANAGER CHECK	Rule to check for valid manager	Administrator	2018-10-19 09:05:10.51			Ť	1	×			
8 - 2 Erwin 9 - 2 Erwin_Sales 9 - 2 NASDAQ HEALTHCARE 9 - 2 New_Folder	2	EMPLOYEE NAME RULE	checking for valid employee nam	Administrator	2018-10-19 09:05:40.04	Administrator	2019-03-13 22:43:50.60	Ť	1	×			
	3	Incorrect_Object_Id	desc	Administrator	2019-09-11 14:11:59.4	Administrator	2019-11-01 13:19:02.19	Ť	1	×			
	4	INVALID EMP RULE		Administrator	2018-10-19 09:05:57.25			Ť	1	×			
Workspace				Right	: Pane								

UI Section	Function
Workspace	Use this pane to browse and work on validation rules, environments, ref-
Workspace	erence folders, and reference tables.
Published Tables	Expand this pane and browse through it to view and export published ref-
Published Tables	erence tables.
Dight Dana	Use this pane to work on the data based on your selection in the Work-
Right Pane	space pane.
Additional Table	Expand this pane to view or work on additional information of a ref-
Information	erence table selected under the Workspace pane.

Managing reference data involves the following:

- Adding reference data to reference tables
- Assigning users
- Validating reference tables
- Associating codesets with reference tables
- Creating publish environments

- Publishing and versioning reference tables
- Associating reference tables with mappings

Creating Reference Tables

Reference tables store reference data. You can create reference tables in new or existing reference folders. You can also create reference sub-folders and create reference tables under it.

To create reference tables in a new reference folder, follow these steps:

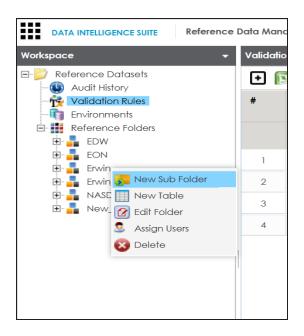
- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, right-click the **Reference Folders** node and click **New Folder**.

The New Folder page appears.

3. Enter Folder Name, Folder Description, and click

The folder is created and saved in the Reference Folders tree.

Note: You can create sub-folders under a reference folder to provide one more level of categorization to reference tables.



4. Right-click the reference folder.

Workspace 👻	Refere	Reference Tables						
Reference Datasets Audit History Validation Rules Environments	#	Table Name	Description					
Reference Folders EDW EON Erwin Frwin NASE New Sub Folder NASE New Table New Color	1	ERWINDIS						

5. Click New Table.

The New Reference Table page appears.

Mew Reference To	ıble		_ = ×
			Save Cancel
Folder Name :	Erwin		
Table Name* :			
Version :	1.00		
Owner* :			
Data Steward :	-Select Data Steward-		•
Description :			
Import Data from Spre	adsheet		
			+ ×
Column Name		Order	

6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description								
Folder Name	Specifies the name of the reference folder. For example, NASDAQ Healthcare. It is autopopulated and cannot be edited.								
Table Name	Specifies the name of the reference table. For example, Data_Classifications_Levels.								
Version	Specifies the version of the reference table. For example, 1.00. It is autopopulated and cannot be edited.								
Owner	Specifies the reference table owner's name. For example, Talon Smith.								
Data Ste- ward	Specifies the name of the data steward responsible for the reference table. For example, Jane Doe.								

Field Name	Description							
	For more information on configuring data stewards, refer to the Con-							
	figuring Data Stewards topic.							
	Specifies the description about the reference table.							
Description	For example: This reference table serves as domain for the data clas-							
	sification column.							

7. Click 💾.

A new reference table is created and saved in the Reference Tables tree.

Once a reference table is created and added to a reference folder, you can add data to it in one of the following ways:

- Adding reference data manually
- Importing reference data from .xlsx files
- Importing reference data through a DB scan

Adding Reference Data Manually

You can add data to a reference table manually. It involves adding reference columns to the reference table and then adding reference column values.

To add reference columns to reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, expand the desired reference folder.
- 3. Expand the **Reference Tables** node, right-click the desired table, and click **Alter Table**.

Workspace 🗸	Reference Columns	
E- Datasets	No Reference Column	is to display
Audit History	Additional Table Inform	ds from 1 to 1 of 1
T_NAME(1.00) T_NAME(1.00) T_NAME(1.00) Alter To	ope	rties User Defined Fields
	ate Validations (: ate Codeset Users	T_NAME 1.00 Janedoe Reference Table for data integration

The Alter Table page appears.

🖉 Alter Table					_
					li ×
Folder Name :	Erwin				
lable Name* :	T_NAME				
/ersion :	1.00				
Owner* :	Samuel				
Data Steward :	janedoe				•
Description :	Reference	Table for da	ta integration proje	ect.	
Created By :	Administra	ator		Created Date :	2019-12-23 17:13:09.15
Aodified By :				Modified Date :	
					_
					€ ×
Column Name	Order	Created By	Created Date	Modified By	Modified Date

4. Click 💽.

A new row is added to the grid.

5. Double-click the cell under the **Column Name** and type the reference column name.

🖉 Alter Table						_ 🗆 🗙				
					Li ×	j				
Folder Name :	Erwin									
Table Name* :	T_NAME									
Version :	1.00	.00								
Owner* :	Samuel									
Data Steward :	janedoe				•					
Description :	Reference	Table for dat	ta integration proje	ect.						
Created By :	Administra	tor		Created Date :	2019-12-23 17:13:09.15					
Modified By :				Modified Date :						
					Ð	×				
Column Name	Order	Created By	Created Date	Modified By	Modified Date					
ID	1									
Nam										

Note: You can add multiple reference columns.

6. click 💾.

The reference columns are added to the reference table.

DATA INTELLIGENCE SUITE Reference	Data Manager						۹.	× 0	88
Workspace 👻	Reference Columns								^
E- 🔁 Reference Datasets	2 🦻								8
🙀 Validation Rules 👘 Environments	ID	NAME	CREATED BY	CREA	ITED DATE	MODIFIED BY	MODIF	ED DATE	
	No Records Found								• •
	Additional Table Information Table Properties	User Defined Fields	Associated Valia	lations Associate	ed Codesets	Assigned Users			× •
	Table Name :	NAME							
	Version :	.00	Owner :	Samuel					
	Data Steward View :	anedoe							
	Description :	Reference Table for data integration	n project.						
	Version Label :								
	Created By :	Administrator	Created Date :	2019-12-23 17:13:09.15					
	Modified By :	Administrator	Modified Date :	2019-12-23 17:23:28.993					
Published Tables									

To add reference column values manually, follow these steps:

- 1. Click 🌌.
- 2. Click 🚳.

The Add Reference Data page appears.

3. Double-click the cells under the reference columns and type the respective reference column values.

Add Reference Da	a	
4		
ID	NAME	
2341		
	Andrew	

4. Click 😡.

The reference column values are added to the reference table.

Importing data from MS Excel Files

You can import reference data from MS Excel files into reference tables. First, you need to add columns to a reference table and then add reference data into these columns from an MS Excel file.

To add columns into reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, expand the desired reference folder.
- 3. Expand the **Reference Tables** node, right-click the desired table, and click **Alter Table**.

Workspace 🗸	Reference Columr	15	
E- Datasets	No Reference Co	lumns to display	
Audit History		ecords from 1 to 1	of 1
T_NAME(1.00)	Additional Table Ir		
Erwin_Sales	able	operties	User Defined Fields
E Now Folder	/ersion	T_NAME	
E Copy		1.00	
Publist		: ianedoe	
	iate Validations		a Tabla far data integration
	iate Codeset	Referenc	e Table for data integration
S Assign			
S Delete	3		

The **Alter Table** page appears.

Alter Table						- - ×		
Folder Name :	Erwin							
Table Name* :	T_NAME	T_NAME						
Version :	1.00							
Owner* :	Samuel	Samuel						
Data Steward :	janedoe	janedoe 🔻						
Description :	Reference	able for do	ita integration proj	ect.				
Created By :	Administro	ator		Created Date :	2019-12-23 17:13:09.15			
Modified By :				Modified Date :				
					Ð	×		
Column Name	Order	Created By	Created Date	Modified By	Modified Date			

- 4. Click 💽.
- Double-click the cell under the Column Name and type a column name.
 Note: You can add as many column names as you want.

						×		
Folder Name :	Erwin							
Table Name* :	T_NAME							
Version :	1.00	1.00						
Owner* :	Samuel	Samuel						
Data Steward :	janedoe	janedoe 🔻						
Description :	Reference	Reference Table for data integration project.						
Created By :	Administro	ator		Created Date :	2019-12-23 17:13:09.15			
Modified By :				Modified Date :				
						•] ≯		
Column Name	Order	Created By	Created Date	Modified By	Modified Date			
ID	1							
Vam								

6. click 💾.

The columns are added to the reference table.

DATA INTELLIGENCE SUITE Reference	ə Data Manager						९ 🗢 🛛 🖻 🖪
Workspace 👻	Reference Columns						^
Reference Datasets Audit History	2 9						2 2
Validation Rules Environments Reference Folders	ID	NAME	CREATED BY	CREAT	IED DATE	MODIFIED BY	MODIFIED DATE
EDW EDW EDN ENN Erwin Erwin Erwin Erwin Erwin							
T_NAME(1.00)	•)
Erwin_Sales ASDAQ HEALTHCARE	- No Records Found						
🗈 🚪 New_Folder	Additional Table Informat	ion					~
	Table Propertie	User Defined Fields	Associated Valid	lations Associated	d Codesets	Assigned Users	,
	Table Name :	T_NAME					
	Version :	1.00	Owner:	Samuel			
	Data Steward View :	janedoe					
	Description :	Reference Table for data integration p	project.				
	Version Label :						
	Created By :	Administrator	Created Date :	2019-12-23 17:13:09.15			
	Modified By :	Administrator	Modified Date :	2019-12-23 17:23:28.993			
Published Tables							

To upload reference data from an MS Excel file into the columns, follow these steps:

1. Click and then click s.

The Import Table Data page appears.

🛐 Import Table Data	_ 🗆 ×
Attach Choose File No file chosen	
۲X (1)	

- 2. Click **Choose File** to browse the .xlsx file and then click
- 3. Double-click the Select Column to Import cell of a desired column.

Note: Column names added by you in the previous steps appear as options.

CREATED BY Clear Selection D NAME Clear Selection Administrator Administrator Administrator	CREATED DATE Select Column To Import 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503	MODIFIED BY Select Column To Import Administrator Administrator Administrator Administrator Administrator	MODIFIED DATE Select Column To Import 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543	
Clear Selection ID NAME Clear Selection Administrator Administrator	Select Column To Import 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503	Select Column To Import Administrator Administrator Administrator Administrator	Select Column To Import 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543	A
ID NAME Clear Selection Administrator Administrator	2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503	Administrator Administrator Administrator Administrator	2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543	
NAME Clear Selection Administrator Administrator	2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503 2019-09-11 14:09:18:503	Administrator Administrator Administrator	2019-09-11 14:15:20.543 2019-09-11 14:15:20.543 2019-09-11 14:15:20.543	
Administrator Administrator	2019-09-11 14:09:18.503 2019-09-11 14:09:18.503 2019-09-11 14:09:18.503	Administrator Administrator	2019-09-11 14:15:20.543 2019-09-11 14:15:20.543	_
Administrator	2019-09-11 14:09:18.503 2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503			_
		Administrator	2019-09-11 14:15:20.543	
Administrator	0010 00 11 1 000 10 500			
	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	-
	Administrator Administrator	Administrator 2019-09-1114-09:18.503 Administrator 2019-09-1114-09:18.503	Administrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503AdministratorAdministrator2019-09-1114.09:18.503Administrator	Administrator 2019-09-1114.09:18.503 Administrator 2019-09-1114:15:20.543 Administrator 2019-09-1114:09:18.503 Administrator

4. Select the appropriate <column name>.

Note: You can select multiple columns.

5. Click 1

The reference data is added to the reference table.

Importing Data Through DB Scans

You can import reference data from a database by connecting the database to the application. It involves creating a reference table and adding reference columns to it. Reference column values can be imported from the desired columns in the database.

To add reference columns to reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the Workspace pane, expand the desired reference folder.
- 3. Expand the **Reference Tables** node, right-click the desired table, and click **Alter Table**.

Workspace 👻	Reference Columns
Reference Datasets	No Reference Columns to display
Audit History	
🙀 Validation Rules	
E Reference Folders	
🖶 - 🖶 EDW	
EON	
🚊 📕 Erwin	Records from 1 to 1 of 1
🛓 🦪 Reference Tables	
ERWINDIS(1.00)	Additional Table Information
T_NAME(1.00)	line office and Fields
🗄 📲 Erwin_Sales 🛛 🕜 Alter Ta	able User Defined Fields
🖶 🚽 NASDAQ HEALTHCA 🚹 New Ve	/ersion
🗄 🔒 New_Folder 🛛 🚺 Copy	T_NAME
	1.00
Publish	
🙀 Associa	ate Validations (: janedoe
	ate Codeset Reference Table for data integration
S Assign I	Users
🔞 Delete	

The Alter Table page appears.

					Ľ ⊻		
older Name :	Erwin						
able Name*:	T_NAME						
/ersion :	1.00	1.00					
Owner* :	Samuel	Samuel					
Data Steward :	janedoe	janedoe 🔻					
Description :	Reference	e Table for da	ta integration proje	ect.			
Created By :	Administr	ator		Created Date :	2019-12-23 17:13:09.15		
Vodified By :				Modified Date :			
					+ :		
Column Name	Order	Created By	Created Date	Modified By	Modified Date		

4. Click 🛃.

A new row is added to the grid.

5. Double-click the cell under the **Column Name** and type the reference column name.

Note: You can add multiple reference columns.

🖉 Alter Table					
					Ľ X
Folder Name :	Erwin				
Table Name* :	T_NAME				
Version :	1.00				
Owner* :	Samuel				
Data Steward :	janedoe				•
Description :	Reference	Table for da	ta integration proje	ect.	
Created By :	Administro	itor		Created Date :	2019-12-23 17:13:09.15
Modified By :				Modified Date :	
					•
Column Name	Order	Created By	Created Date	Modified By	Modified Date
ID	1				
Nam					

6. Click 💾.

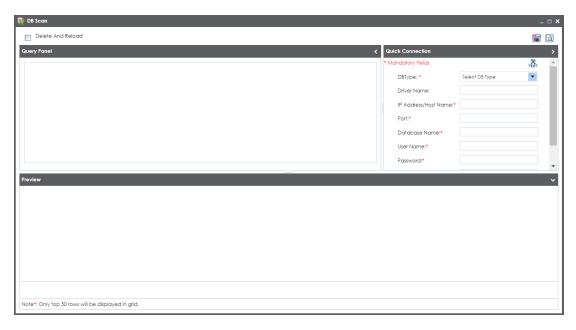
DATA INTELLIGENCE SUITE Reference	Data Manager				Search	Q 🌣 🛛 🖻 🖪
Workspace 🔹	Reference Columns					^
Reference Datasets Audit History	2 🖗					8
Audi History	Additional Table Informat Additional Table Informat Table Name : Version : Data Steward View : Description : Version Label : Created By :		Owner : ion project.	Idions Associated Codesel	Is Assigned Users	MODIFED DATE
	Modified By :	Administrator		2019-12-23 17:23:28.993		
Published Tables						

The reference columns are added to the reference table.

To add reference column values to the reference columns through a DB scan, follow these steps:

- 1. Click 🌌.
- 2. Click 📭.

The DB Scan page appears.



3. Enter appropriate values in the fields in the **Quick Connection** tab to establish a connection with a database. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
	Specifies the database type.
DB Type	For example, Sql Server.
	Specifies the JDBC driver name for connecting to the database.
Driver Name	For example, com.microsoft.sqlserver.jdbc.SQLServerDriver
	The field is autopopulated based on the DB Type.
IP Address/Host	Specifies the IP address or server host name of the database.
Name	For example, localhost.
	Specifies the port to connect with the database.
Port	For example: 1433 is the default port for a Sql Server database
	type.
	Specifies the database name being used to connect to the ref-
Database Name	erence table.
	For example, ErwinDIS931.

Field Name	Description
	Specifies the user name to connect with the database.
User Name	For example, sa.
	Specifies the password to connect with the database.
Password	For example, goerwin@1.

4. Click 🔀 to test the connection.

If the connection is established, the success message appears.

- 5. Write a query in the **Query Panel** to pull the data from the database.
- 6. Click $\overline{\mathbf{M}}$ to validate the query.
- 7. Click 🔯 to preview the data.

The data is previewed.

🥫 DB	Scan						_ 🗆 ×
	Delete And Reload						📓 🗋 î
Quer	Panel		Quick Connection		>		
sele	et * from <u>dbo.Project</u>				* Mandatory Fields		¥ A
					DBType: *	Sql Server	-
			Driver Name:	com.microsoft	.sqlserver.jdbc.SC		
					IP Address/Host Name	e;* localhost	
					Port:*	1433	
					Database Name:*	ErwinDIS931	
					User Name:*	sa	
					Password:*	•••••	_
Previe	w						~
SNo	PROJ_ID	PROJ_NAME	PROJ_DESCR	PROJ_COST_CENTER	PROJ_IT_SPON	SOR_FULL_NAME	PROJ_BUS_SPONSOR
	Select column to import	Select column to import	Select column to import	Select column to import	Select column t	o import	Select column to ir 📤
1	1	ERP					
2	2	EDW					
3	3	Sales Data Mart					
4	4	BFSI Integration					
5	4	Data Lako Miaration					• • •

8. Double-click the Select Column to Import cell under the desired column.

A drop-down option appears displaying the reference columns.

	elete And Reload							
								Ste D
Query	Panel			<	Quick C	Connection		
selec	t * from <u>dbo.Project</u>				* Manda	itory Fields		TEST
					DB	Type: *	Sql Server	-
					Driv	ver Name:	com.microsoft	.sqlserver.jdbc.SC
					IP A	Address/Host Name:*	localhost	
					Por		1433	
						tabase Name:*	ErwinDIS931	
					Da	rabase Name:"		
					Use	er Name:*	sa	
						er Name:* ssword:*	sa	
eviev	w							
-	w PROJ_ID	PROJ_NAME	PROJ_DESCR	PROJ_COST_CENTER			•••••	PROJ_BUS_SPON
-		PROJ_NAME Select column to import	PROJ_DESCR Select column to import	PROJ_COST_CENTER Select column to import		ssword:*	PR_FULL_NAME	PROJ_BUS_SPON Select column to
-	PROJ_ID	Select column to import				ssword:* PROJ_IT_SPONSO	PR_FULL_NAME	
-	PROJ_ID	Select column to import ID NAME Clear selection				ssword:* PROJ_IT_SPONSO	PR_FULL_NAME	
-	PROJ_ID ID 1	Select column to import				ssword:* PROJ_IT_SPONSO	PR_FULL_NAME	
eviev No	PROJ_ID ID 1 2	Select column to import ID NAME Clear selection				ssword:* PROJ_IT_SPONSO	PR_FULL_NAME	

9. Choose an appropriate <Reference_Column_Name> from the drop-down.

Note: You can import multiple columns from the database.

10. Click 🛍.

The column values from the database are uploaded into the selected reference columns.

Assigning Users to Reference Folders

You need to assign users to a reference folder before assigning them to reference tables under it.

To assign users to reference folders, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, right-click the reference folder to be assigned.

Workspace 🗸	Refere	ence Tables		
□·	#	Table Name	Description	Lock Status
Audit History				
Validation Rules Environments				
	1	ERWINDIS		
🔁 📕 EDW	2	T_NAME	Reference Table for data integration	V
EON	2	I_INAME	Reference table for adid integration	¥
Erwin				
NASD New Table				
🗄 📲 New- 🕜 Edit Folder				
Assign Users				
🔞 Delete				
· · · · · · · · · · · · · · · · · · ·				

3. Click Assign Users.

The Assign Users page appears. For more information on creating users and assigning roles, refer to the <u>creating users and assigning roles</u> topic.

Assign Users		_ = ×
User ID	Assigned Users	
ks123 mboggs mread new_user_Id public		~
Note*: Only Non-Administr	ator Ids will be displayed here.	*

- Use (⇒ or ⇒) to move users from User ID list-box to Assigned Users list-box and use (← or ←) to move users from Assigned Users list-box to User ID list-box.
- 5. Click 💾.

Users are assigned to the reference folder.

Note: Assigning users to a reference folder enables you to assign them to the reference tables under it.

Assigning Users to Reference Tables

You can assign users to reference tables enabling them to access the tables. Before, you assign a user to a reference table, you must assign the user to the corresponding reference folder.

To assign users to reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, expand the desired reference folder.
- 3. Expand the **Reference Tables** node, right-click the desired table, and click **Assign Users**.

Workspace 🗸 🗸	Reference Colu	mns	
	👔 🌚 🛐	B	
Validation Rules Environments	ID		NAME
EDW	813		Administrator
Erwin Erwin ERWINDIS(1.00) T_NAME(1.0) Erwin_Sales	le	Pecords from 1 to 5	Administrator 9 of 59
🔁 - 🚦 NASDAQ HEALTHC 🎦 New Ver 🗄 - 📮 New_Folder 🛛 🙀 Copy 📸 Publish	sion	nformation Properties	User Defined Fields
Associate Associate	e Validations e Codeset	T_NAME	
S Assign Us	ers	w: janedoe	
😵 Delete	Beschphort.	Referenc	ce Table for data integration project.

The Assign Users page appears.

		Li 🛛	
User ID	Assigned Users		
ks123 mboggs mread new_use_ld public			
	*	-	

Use (⇒ or ⇒) to move users from User ID list-box to Assigned Users list-box and use (← or ←) to move users from Assigned Users list-box to User ID list-box.

Note: User ID list-box displays the user ID of only those users who are assigned to the corresponding Reference Folder. For more information, on assigning users to

5. Click 💾.

Users are assigned to the reference table.

Note: Assigning users to a reference table provides them read and write access to the reference table.

To view the list of the assigned users, follow these steps:

- 1. Click the reference table.
- 2. Expand the Additional Table Information page and click Assigned Users.

The assigned users to the selected reference table are displayed.

DATA INTELLIGENCE SUITE Referen	ce Data Manager				Search	० ¢	08				
Workspace	✓ Reference Col	umns					^				
Reference Datasets Audit History	<u>a</u> 🚳 🛐	🕺 🔮 🗟 🛤 🛛 💀 🗙 🗟									
	ID		NAME	CREATED BY	CREATED DATE	MODIFIED BY	M				
EDW	813		Administrator	Administrator	2019-12-23 17:59:02.443	Administrator	4				
Erwin Gradie Contraction Erwin Erwin Erwin ErwinDis(1.00)	813 813		Administrator Administrator	Administrator Administrator	2019-12-23 17:59:02.443	Administrator Administrator					
	813		Administrator	Administrator	2019-12-23 17:59:02.443	Administrator					
Image: Solid Stress Image: Solid	A13	- Records from 1 to	Administrator	Administrator	<u>9019-19-93 17-50-09 ∡⊿3</u>	Administrator	••••				
	Additional Tab	le Information					~				
	↓ Tab	le Properties	User Defined Fields	Associated Validations	Associated Codesets	Assigned Users	•				
	*	User Id									
	2	Cyrus ks123					Î				
	3	mboggs									
Published Tables	▲ 4	mread					*				

Creating Publish Environments

Reference tables can be published to various environments like development, production, test etc. You can also specify the schema of the environment, for example, DBO.

To create publish environments, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, right-click **Environments**.

DA	TA INTELLIGENCE SUITE Reference	Data Mai	nager						ৎ 🌣	Ø	8		
Workspac	e 👻	Validat	ion Rule Grid								^		
	eference Datasets Audit History	Ð	• 🗈 🔹										
Ť	Validation Rules Environments	*	Validation Name	Validation Description	Created By	Created Date	Modified By	Modified Date	Validation Rule	Edi	Dele		
		1	EMPLOYEE MANAGER CHECK	Rule to check for valid manag	Administrator	2018-10-19 09:05:10.			Ť	1	×		
		2	EMPLOYEE NAME RULE	checking for valid employee r	Administrator	2018-10-19 09:05:40.	Administrator	2019-03-13 22:43:50	Ť	1	×		
		3	Incorrect_Object_Id	desc	Administrator	2019-09-11 14:11:59.	Administrator	2019-11-01 13:19:02	Ť	/	×		
		4	INVALID EMP RULE		Administrator	2018-10-19 09:05:57.			Ť	1	×		
			Records from 1 to 4 of	4									
Published	Tables 🔺	Additio	nal Table Information								^		

3. Click New Environment.

The New Environment page appears.

	- x
Ľ ×	

4. Enter Environment Name and Schema Name.

For example:

- Environment Name Production
- Schema Name DBO
- 5. Click 💾.

The publish environment is created and saved in Publish Environments page.

Adding Validation Rules

You can define a validation rule and validate a reference table using it.

To add validation rules, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the Workspace pane, click the Validation Rules node.

The Validation Rule grid appears.

		and mu	nager						९ 🏚	0	2
Workspace	•	Valida	tion Rule Grid								^
Reference Datasets Generation		٠I									
Validation Rules Environments Reference Folders		#	Validation Name	Validation Description	Created By	Created Date	Modified By	Modified Date	Validation Rule	Edi	Dele
		1	EMPLOYEE MANAGER CHECK	Rule to check for valid manag	Administrator	2018-10-19 09:05:10.			Ť	/	×
		2	EMPLOYEE NAME RULE	checking for valid employee r	Administrator	2018-10-19 09:05:40.	Administrator	2019-03-13 22:43:50	Ť	1	×
		3	Incorrect_Object_Id	desc	Administrator	2019-09-11 14:11:59			ŤŻ	1	×
		4	INVALID EMP RULE		Administrator	2018-10-19 09:05:57			ŤŻ	/	×
Published Tables			Records from 1 to 4 of	4							~

3. Click 💽.

The New Validation Rule page appears.

New Validation Rule		_ 🗆 ×
	Ľ ×	
Validation Name * :		
Validation Description :		
Validation Rule * :		
Note* : Validation query sho	ould be in the following format for successful execution	
Or	ION ERROR MESSAGE' from ION ERROR MESSAGE' ERROR MSG from	
	e the first column and the validation error message should be the	

4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Validation Name	Specifies the name of the validation rule.
	For example, Incorrect_Object_ID.
Validation Descrip	Specifies the description about the validation rule.
Validation Descrip- tion	For example: This validation rule validates the ERWIN_SALES ref-
	erence table.
Validation Rule	Specifies the SQL query of the validation rule.
	For example: select * from ERWIN_SALES where ID = 1000000.

5. Click 💾.

The validation rule is created and saved in the Validation Rule Grid.

Validation Rule Grid									
# Validation N									×
	ame Valie	idation Description	Created By	Created Date	Modified By		Validation Rule	Edit	De
1 EMPLOYEE MA	ANAGER CHECK Rule	to check for valid manager	Administrator	2018-10-19 09:05:10.51			Ť	1	×
2 EMPLOYEE NA	AME RULE chec	cking for valid employee nam .	Administrator	2018-10-19 09:05:40.04	Administrator	2019-03-13 22:43:50.60	Ť	1	×
3 Incorrect_Obj	ject_ld desc	;	Administrator	2019-09-11 14:11:59.4			Ť	1	×
4 INVALID EMP I	RULE		Administrator	2018-10-19 09:05:57.25			Ť	1	,
					-			Records from 1 to 4 of 4	

6. Use the following options:

Validation Rule (1)

To view validation rule queries, click 🔂

Edit (🖍)

To edit validation rules, click 🖍.

Delete (👗)

To delete validation rules, click X.

Associating Validation Rules with Reference Tables

After creating a validation rule, you need to associate the validation rule with a reference table.

This allows you to execute the validation rule to validate data in the reference table.

To associate validation rules with reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, expand the desired reference folder.

3. Expand the **Reference Tables** node, right-click the desired table, and click **Associate Validations**.

Workspace 👻	Reference Co	olumns		
Reference Datasets Audit History	<u>i</u> 🚳 👔	ā 📭		
Validation Rules Environments EDW EON EON EV ECON Erwin ERWINDIS(1.00)	ID 813 4	813 Administrate 813 Administrate		NAME Administrator Administrator
	odeset	view :	T_NAME 1.00 janedoe	User Defined Fields

The Associate Validation page appears.

1 ×	ssociate Validations				_ 🗆 ×
					∐ ×
Avail	able Validations	<	Assoc	iated Validations	>
#	Validation Rule Name	Validation Rule Description	#	Validation Rule Name	Validation Rule Description
1	EMPLOYEE MANAGER CHECK	Rule to check for valid manc			
2	EMPLOYEE NAME RULE	checking for valid employee			
3	INVALID EMP RULE				
4	Incorrect_Object_Id	desc			

4. Drag and drop the validation rule from **Available Validation** tab to **Associated Validation** tab.

For more information on adding validation rules, refer to the <u>Adding Validation Rules</u> topic.

📸 A	ssociate Validations				_ 🗆 ×
					Li 🗙
Avail	able Validations	<	Assoc	iated Validations	>
#	Validation Rule Name	Validation Rule Description	#	Validation Rule Name	Validation Rule Description
1	EMPLOYEE MANAGER CHECK	Rule to check for valid manc			
2	EMPLOYEE NAME RULE	checking for valid employee			
3	INVALID EMP RULE			4	
4	Incorrect_Object_Id	desc			

5. Click 💾.

The associated validation rules appear under the Associated Validations tab.

Reference Dotosels Image: Created BY Created BY Created BY Modified DATe Modified DATe Modified DATe Validation Nues Image: Created BY Created BY Created BY Modified DATe	
Validation Rules ID CREATED BY CREATED DATE MODIFIED BY MODIFIED D Environments Reference Folders Image: State	
Reference Foldes Image: Constraint of the second seco	-43-51 143
EON 813 Administrator 2019-11-01 11:43:51.143 Administrator 2019-11-01 11 Etwin 813 Administrator 2019-11-01 11:43:51.143 Administrator 2019-11-01 11 Etwin_Sales 813 Administrator 2019-11-01 11:43:51.143 Administrator 2019-11-01 11 Reference Tobles 813 Administrator 2019-11-01 11:43:51.143 Administrator 2019-11-01 11 Image: Reference Tobles 813 Administrator 2019-11-01 11:43:51.143 Admini	:43:51 143
win spaces 813 Administrator 2019-11-01 11:43:51.143 Administrator 2019-11-01 11: 813 Iseference Tobles 813 Administrator 2019-11-01 11:43:51.143 Administrator 2019-11-01 11:43:51.143 Image: Brown SALESLILOD 813 Administrator 2019-11-01 11:43:51.143 Administrator 2019-11-01 11:43:51.143	11010111110
rence Tables 813 Administrator 2019-11-01 11:43:51.143 Administrator<	:43:51.143
	:43:51.143
	:43:51.143
Additional Table Information Table Properties User Defined Fields Associated Validations Associated Codesets Assigned Users	
Validation Rule Name Validation Rule	
1 Incorrect_Object_Id	

Running Validations Against Reference Tables

You can run a validation rule query against a reference table after associating the table with the validation rule. Executing validation rule validates the data in the reference table.

To run validation rules against reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the Workspaces pane, expand the Reference Folders node.
- 3. Expand the **Reference Tables** node and click the reference table to be validated.

The following page appears.

DATA INTELLIGENCE SUITE Reference	ce Data Mar	lager				९ 🌣 🛛 🖪				
Workspace •	- Referen	ice Columns				^				
Reference Datasets Audit History	2	%				2 2				
🙀 Validation Rules 晴 Environments	ID		CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE				
E- Reference Folders										
🗄 📕 EON 🗄 📕 Erwin	813		Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43				
🗄 📲 Erwin_Sales	813		Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:40				
ERWIN_SALES(1.00)	813		Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:40				
🗉 🚽 NASDAQ HEALTHCARE	813		Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43				
E- Polder	L_ 1 -	Records from 1 to 59 of 59								
	Addition	nal Table Information				v				
	4	Table Properties	User Defined Fields	Associated Validations	Associated Codesets	Assigned Users				
	#	Validation Rule	Name		Validation Rule Description					
	1	Incorrect_Objec	t_ld		desc					

Note: Ensure that you are not in edit mode. If you are in edit mode, click **1** to cancel edit.

4. To validate the reference table, click $\widehat{\mathbb{W}}$.

The Validate Table page appears.

Select Enviro	onment:* DEV	-	
Select	Validation Name		
\checkmark	Incorrect_Object_Id		

5. Select an Environment and a Validation rule.

For more information on creating environments, refer to the <u>Creating Publish Envir</u>onments topic.

6. Click 💾.

Validation is successfully executed.

Note: The error rows returned by executing the validations are highlighted in red color.

-			search	९ 🗢 🛛 E
✓ Reference Columns				
2 🤣				
ID	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:
9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:
9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:
9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
Records fro	om 1 to 59 of 59			
Additional Table Informatio	n			
	Reference Columns ID ID 813 813 813 813 813 813 813 813 813 813 813 813 813 814 815 817 9 <	Reference Columns ID CREATED BY ID CREATED BY E E B13 Administrator 9 Administrator	Reference Columns ID CREATED BY CREATED DATE ID CREATED BY CREATED DATE III Image: Creating and the second and the secon	ID CREATED BY CREATED DATE MODIFIED BY ID Administrator 2019-11-01 11:43:51.143 Administrator B13 Administrator 2019-11-01 11:43:51.143 Administrator 9 Adm

Associating Codesets With Reference Tables

You can associate codesets with columns of a reference table. Codesets can be used as configurable pick lists so that data can be selected from the drop-down.

To associate codesets with columns of reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, expand the desired reference folder.
- 3. Expand the Reference Tables node and right-click the reference table to be associated.

Workspace 👻	Reference (Columns					
Reference Datasets Audit History	<u>í</u>	🔋 📑					
Validation Rules	ID			NAME		CREATED BY	
Reference Folders						L	
EDW	1			ERP		Administrator	
EON	1					Administrator	
🖨 📲 Erwin	2			EDW		Administrator	
ERWINDIS(1.00)	•					:	
T MANAGER OF	1 1		from 1 to 19	of 19			
E Sub_Folder Alter Table							
🗈 📕 Erwin_Sales 🎽 New Version		ble Informat	ion				
🗈 🚦 NASDAQ HEAL 🌇 Copy					12.11		
🗈 🚦 New_Folder 🛛 📸 Publish		ıble Properti	es	User Defined	d Helds	Associated Vali	dations As:
💏 Associate Vo	lidations		T_NAME				
📲 Associate Co	odeset		1.00			Owner:	Samuel
Assign Users							
🔀 Delete		l View :	janedoe				
•	Description		Reference	e Table for data inte	egration project.		
	Version Lab	əl :					

4. Click Associate Codesets.

The Associate Codeset page appears.

5. Double-click the cell against the column to be associated and select the appropriate codeset.

For more information on codesets, refer to the <u>Maintaining Enterprise Codesets</u> section.

		>
Column Name	Associated Codeset	
)	N/A	
JAME		
	EDW.Marital Status EDW.Country Codes erwin DIS.Project_System ICD 10.Certain zoonotic bacterial diseases ICD 10.Malignant neoplasm of ovary ICD 10.Tuberculosis	

6. Click

The codeset is associated with the column of the reference table.

The corresponding column in the reference table is now configured as a drop-down and populated with values from the selected codeset.

Workspace 👻	Reference Columns					^		
Reference Datasets Audit History	📓 🍓 🖪 🖶	26 🗙 💀 💀 💀						
	ID	NAME	CREATED BY	CREATED DATE	MODIFIED BY	M		
Reference Folders								
🕀 📕 EON	1	ERP	Administrator	2019-12-24 15:12:28.273	Administrator	: ^		
Erwin	2	EDW	Administrator	2019-12-24 15:12:28.273	Administrator	4		
ERWINDIS(1.00)	3	Sales Data Mar	Administrator	2019-12-24 15:12:28.273	Administrator	1		
🕀 💦 Sub_Folder	4	Admin(1) Joe Villers(4)	Administrator	2019-12-24 15:12:28.273	Administrator			
Erwin_Sales Image: Solution of the second	6	Kartik Sridhar(2) Resource_Name(3)	Administrator	2019-12-24 15:12:28.273	Administrator			
🗄 🚦 New_Folder	4	Clear Value Sales Data Mart	∆dministrator	2010-12-24 15-12-28 273	∆dministrator),* 		
	Records from 1 to 1	19 of 19						

Note: Ensure that you are in edit mode.

Versioning Reference Tables

You can create versions of reference tables and track the legacy of reference tables. The old version is archived and new version is added to the Reference Table tree in the Workspace pane.

To create versions of the reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the **Workspace** pane, right-click a reference table.

Note: Ensure that the reference table is not in edit mode (locked condition). If it is in edit mode, click 🚳 to cancel edit.

Workspace 👻	Reference Co	olumns	
Reference Datasets Audit History	🚳 🚳 🛙	3 B	
Validation Rules Environments Reference Folders U			NAME
EON ■ I Erwin	2		ERP
ERWINDIS (1.00)	3		Sales Data Mart
LNAM Inter Table Sub_Folde Mew Version New Version			BFSI Integration Data Lake Migration
Associate Val		— Records from 1 to 19	of 19
Associate Co Assign Users		ble Information	
😵 Delete		ible Properties	User Defined Fields
	Table Name :	T_NAME	

3. Click New Version.

The New Version page appears.

🎦 New Version	×
Table Name*	T_NAME
Version	1.01
Description	Reference Table for data integration project.
Version Label	
Changed Description*	

4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Table Name	Specifies the name of the reference table.
	For example, Data_Classifications_Levels.
Version	Specifies the new version of the reference table.
Version	For example, 1.02.
	Specifies the description about the reference table.
Description	For example: This reference table serves as domain for the data clas-
	sification column.
Version Label	Specifies the version label of the reference table.
	For example, Beta.
Changed	Specifies the description of the changes made in the reference table.
Description	For example: A new column, Object_ID was added in the reference
	table.

5. Click 💾.

The new version of the reference table is created and saved under the Reference Table tree.

Workspace 🗸	Archi	ve Tables		
Reference Datasets	#	Table Name	Description	Lock Status
Validation Rules				
Reference Folders	1	T_NAME	Reference Table for data integration	
EON				
Erwin				
ERWINDIS(1.00)				
È- îii Archive └── Îii T_NAME(1.00)				
🕀 🌄 Sub_Folder				
🗐 🚦 NASDAQ HEALTHCARE				

Publishing Reference Tables

You can publish a reference table to a publish environment. Before publishing a reference table, you must ensure that the table has passed all validations successfully.

To publish reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. Under the Workspace pane, expand the required reference folder.
- 3. Expand the **Reference Tables** node and right-click the required reference table.

Workspace 👻	Reference C	olumns	
Reference Datasets Audit History	2 🦻		
🙀 Validation Rules 	ID		NAME
EDW EON	1		ERP
Erwin	2		EDW
	3	1	Sales Data Mart BFSI Integration
Erwin_Sales New Version ASDAQ HEAL Copy			Data Lake Migration
🖻 🔒 New_Folder 📄 Publish		— Records from 1 to 1	
Associate Cc Assign Users	deset	ble Information ble Properties	User Defined Fields
	Table Name		

4. Click Publish.

A warning message appears.

5. Click Yes.

The Publish Table page appears.

💦 Publish Table		_
* Publishing the table will cre	eate a new version.	Li ×
Table Name	T_NAME	
Version	1.01	
Version Label		
Change Description*		
Publish Environment*	DEV Production	
		-

6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description		
	Specifies the name of the reference table.		
Table Name	For example, Data_Classifications_Levels.		
	It is autopopulated and cannot be edited.		
	Specifies the current version of the reference table.		
Version	For example, 1.00.		
	It is autopopulated and cannot be edited.		
Version Label	Specifies the version label of the reference table.		
	For example, Beta.		
	Specifies the description about the changes made in the reference		
Change	table.		
Description	For example: A new column, Object_ID was added in the reference		
	table.		
	Specifies the environment to which the reference table would be pub-		
Publish Envir-	lished.		
onment	For example, Production.		
	For more information on creating publish environment, refer to the		
Creating Publish Environments topic.			

7. Click 💾.

The reference table is published and the published version is archived. A new version of the reference table is also created.

Workspace 🗸	✓ Archive Tables			
Reference Datasets Audit History	#	Table Name	Description	Lock Status
Validation Rules				
Reference Folders	1	T_NAME	Reference Table for data integration	
Ē. ∎ EDW Ē. ∎ EON	2	T_NAME	Reference Table for data integration	
Erwin Erwin Feference Tables ERWINDIS(1.00) FINAME(1.02) FINAME(1.02) FINAME(1.01) TINAME(1.01) FINAME(1.00) Erwin_Sales NASDAQ HEALTHCARE New_Folder				



DATA INTELLIGENCE SUITE Reference Data Manager				
Workspace	Reference Colum	nns		
Published Tables	-			
E- I Environments	ID	NAME		
■ ■ NEW_TABLE(1.00) ■ ■ ■ T_NAME(1.01)	1	ERP		
	2	EDW Sales Data Mart		
	4	BFSI Integration		
	6	Data Lake Migration		
	8	OBIEE		
	9	AdventureWorks_Migration		
	12	Carrefour		

Associating Reference Tables with Mappings

The reference table must be published before you plan to link it with mappings.

To associate reference tables with Mappings, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. Under the Workspace Mappings pane, the desired project.
- 3. Expand the Mappings node and click the desired mappings.

The Mapping Specification grid appears.

rmations 📋 📓	🔄 🛃 🛛 APPEND 077	👌 (Integrati	on]	Profiles:	Default	- 🌣 🕻	, 👯 🗟 🖬 🐻 😣 < 🗵	Metadata Matadata Marty Flat Files
ject (6) ntureWorks_Migration (Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	A_System AdventureWorks AMERISURE
no (1) t (2)	1 Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEID	int	4	FLOOR	Atlas Sales System
tion (1) ?) Vigration (3)	2 Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCENAME	varchar	100	REVERSE	Customer Order Ent Data Lake Data Models EDW
	3 Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	dbo.RM_Resource	
S	4 Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCECELLPH	varchar	15	ISNULL	
rgets	5 Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEHOMEP	varchar	15	ISNULL	Salesforce SAP SAP
4							•	Code Mappings Catalogue

- 4. Click 🜌.
- 5. Right-click the **Header Menu** and select the **Reference Table** check box.

ppings 🔺			🞅 [Integratio	- ul	Profiles:	Default	v 🗘 🛛	, 👯 🗟 🖬 🖬 😡 < 🖸	🔺 🏭 Metadata
Transformations	80			onj	Profiles:	Default	• • •	, n a n n n v	Files
Projects A_Project (6) AdventureWorks_Migration (*	Source System Name	Source Environment Name	Name Us	source Column er Defined-46 er Defined-47	Source Column	Source Column Length	Business Rule	A_System AdventureWorks AMERISURE
APJ_Demo (1) B_Project (2) BBT (1)	1	Erwin_Sales	Integration	dbo.RM_RE	er Defined-48 er Defined-49 er Defined-50		4	FLOOR	Atlas Sales System Atlas BI BI BO Reports
BFSI Integration (1) Carrefour (9) Data Lake Migration (3) EDW (3)	2	Erwin_Sales	Integration	dbo.RM_RE 🔲 Ro	apping Spec Row Con w Order eference Table	nments v	100	REVERSE	
ERP (3) Erwin_Feb (1) Erwin_Project (5) Erwin_Sales (1)	3	Erwin_Sales	Integration	dbo.RM_RESOUR	RESOURCEDESC	varchar	150	dbo.RM_Resource	
Crim_sales (1) Cransformations Crast Cases Company	4	Erwin_Sales	Integration	dbo.RM_RESOUR	RESOURCECELLPH	varchar	15	ISNULL	
MappingTargets	5	Erwin_Sales	Integration	dbo.RM_RESOUR	RESOURCEHOMEP	varchar	15	ISNULL	Salesforce SAP T_New
IQVIA (1) New_Project (3)								•	▶ ∎Teradata
OBIEE (23) Sales Data Mart (8)	-		14 - 4	Records from 1 to 7		Dama 1	100 rows per page		Code Mappings Catalogue

The Reference Table column becomes visible in Mapping Specification grid.

6. Drag and drop the reference table from **Reference Table Catalogue** to the required row under the **Reference Table** column.

Note: You can associate multiple source columns with the reference tables.

appings 🛛		PEND OT 🎘 🔝	ntegration]		Profiles: Default	•	🌣 🐚 👯 🗃 🖬 🖬 🖉 < 🗵	Code Mappings Catalogue
Transformations Projects	Target Column	Target Column	Created By	Created Date	Last Modified By	Last Modified	Reference Table	Specification Artifact Catalogue
A_Project (6) AdventureWorks_Migration (Data Type	Length				Date Time		Reference Table Catalogue
Adventionerworks_rvigration (APJ_Demo (1) B_Project (2) BBT (1) BFSI Integration (1)	nt	4	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-14 17:55:08.487	▼T_NAME (1.01)	Ewin
Carrefour (9) Data Lake Migration (3) EDW (3)	/archar	100	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-14 15:02:42.913		E TLAAME (101) B T Sub_Folder B T Fwin_Sales B New_Folder
ERP (3) Erwin_Feb (1) Erwin_Project (5) Erwin_Sales (1)	/archar	150	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-14 15:08:24.523		
rransformations ॐTest Cases ∡ S Mappings	/archar	15	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-13 12:26:07.163		
Integration MappingTargets Exeter (2)	/archar	15	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-13 12:26:07.163		
QVIA (1) New_Project (3) OBIEE (23) Sales Data Mart (8)	4	14	Pacorda	rom 1 to 7	>1 D Page 1	100 rows p	er page	

7. Click 🐻.

The Mapping Specification is saved and the reference table is associated with the mappings.

Using Codeset Manager

To access the Codeset Manager, go to **Application Menu** > **Data Catalog** > **Codeset Manager**. The Codeset Manager dashboard appears:

lesets Workspace	- Summa	ıry							
Enterprise Codesets Invironments	#	Category Name	Category Hierarchy	Codeset Name	# of Active Codes	Created By	Created Date	Modified By	Modified Date
Codesets 3rd Party Flat Files	1	SAP	SAP	Material Number	2	Administrator	2018-09-14 11:04:4	Administrator	2018-09-14 11:04
APJ Demo	2	EDW	EDW	Gender	3	Administrator	2018-10-05 10:47:1	Administrator	2018-10-05 10:47
🗄 📲 EDW 🗄 📲 erwin DIS	3	EDW	EDW	Marital Status	5	Administrator	2018-10-15 10:27:3	Administrator	2018-10-15 10:22
E ICD 10	4	EDW	EDW	Country Codes	5	Administrator	2019-07-16 11:32:5	Administrator	2019-07-16 11:3
 ICD 9 New_Cat New_Category SAP 	5	ICD 10	ICD 10	Certain zoonotic bacterial	18	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:4
	6	ICD 10	ICD 10	Malignant neoplasm of ove	4	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:4
Workspace	7	ICD 10	ICD 10	Tuberculosis Right	t ⁱ Pane	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:4
1. Sec.	8	ICD 10	ICD 10	Intestinal infectious disease	10	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:4
	9	ICD 10	ICD 10	Multiple myeloma	10	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:4
	10	ICD 9	ICD 9	Ovary	1	Administrator	2018-10-15 09:42:4	Administrator	2018-10-15 09:4
	- 11	ICD 9	ICD 9	Tuberculosis	9	Administrator	2018-10-15 09:42:4	Administrator	2018-10-15 09:4
	12	ICD 9	ICD 9	Intestinal infectious disease	, tion Bar	Administrator	2018-10-15 09:42:4	Administrator	2018-10-15 09:4
	13	ICD 9	ICD 9	Multiple myeloma	tion Bar 1º	Administrator	2018-10-15 09:42:4	Administrator	2018-10-15 09:4

UI Section	lcon	Function
		Use this
		pane to
		browse
		through
Markenses		Codesets
Workspace		Workspace
		and Code
		Mappings
		Workspace
		panes.

UI Section	lcon	Function
		Codesets
		Workspace
		enables
		you to cre-
		ate and
		categorize
		codesets.
		Code Map-
		pings
		Workspace
		enables
		you to cre-
		ate and
		categorize
		code map-
		pings.
		Expand
		this pane
		and
		browse
Published Codesets		through it
		to view
		and export
		published
		codesets.
		Use this
		pane to
		work on
		the data
Right Pane		based on
		your selec-
		tion in the
		Workspace

UI Section	lcon	Function
		pane.
		Use this
		bar to nav-
	> >I K K	igate
		through
Pagination Bar	20 rows per page 🖕	the code-
ragination bar		sets data
	Page 1 🖕	displayed
		on the
		Right
		Pane.

Managing codesets involves the following:

- Maintaining enterprise codesets
- Maintaining code mappings

Maintaining Enterprise Codesets

The Enterprise section of the Codeset Manager allows you to create and maintain codesets from various source / systems / environments. You can create codesets, add code name and code value pairs, and version them. You can also publish the codesets to various environments such as development, test, or production and can be used to create code cross-walks (mappings).

Creating Categories

Codes are stored in an hierarchical manner, Categories > Codesets > Codes . You can add codesets to an existing or a new category. You can also create sub-categories under a category to provide one more level of categorization to codesets.

To create a new category, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the Codesets Workspace pane, right-click the Codesets node.

DATA INTELLIGE	NCE SUITE Codeset M	anager	
Enterprise Codes	Codeset Mappings		
Codesets Workspac	e 👻	Summo	ary
Enterprise Co	ents	#	Category Name
🗄 🚺 Codesets	New Category	1	SAP
	Export All	2	EDW
		3	EDW
		4	EDW
		5	ICD 10
		6	ICD 10

3. Click New Category.

The New Category page appears.

🚪 New Category	_ 🗆 🗙
Category Name*	
Category Description	

4. Enter Category Name and Category Description.

For example:

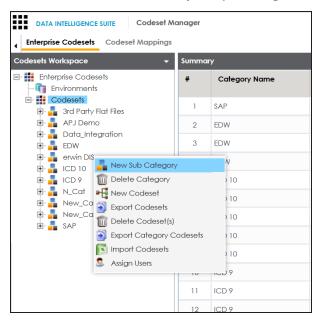
- Category Name EDW
- Category Description This category contains three codesets, Country Codes, Gender, and Marital Status.
- 5. Click 💾.

A new category is created and saved in the category tree.

You can create sub-categories under a category.

To create sub-categories under categories, follow these steps:

1. Under the **Codesets Workspace** pane, right-click the required category.



2. Click New Sub Category.

The New Sub Category page appears.

🚪 New Sub Category	_ = ×
	⊨ ×
Category Name*	
Category Description	

3. Enter Category Name and Category Description.

For example:

- Category Name EDW-HR
- Category Description This is a sub-category under EDW.

4. Click

A sub-category is created and saved in the sub-category tree.

Once a category is created, you can:

- Assign users to the category
- Add codesets to the category

You can manage categories by updating or deleting it.

Managing Categories

Managing categories involves:

- Updating categories
- Deleting categories

To update categories, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the **Codesets Workspace** pane, click the category to be updated.

The Category Details page appears.

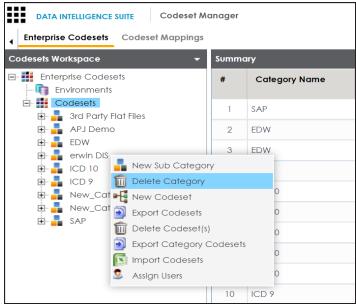
DATA INTELLIGENCE SUITE Codeset Manage	er	Search Q 🗘 🖉 🖪
Enterprise Codesets Codeset Mappings		•
Codesets Workspace 👻 Cate	legory Details	
	Category Description Category Description Created By Created Date Time Last Modified By	erwin DIS Metadata Management Administrator 2019-11-02 12:02:36:473 Administrator
Published Codesets		
Refired Codesets		

- 3. Click 🖉.
- 4. Edit the category details.
- 5. Click

The category is updated.

To delete categories, follow these steps:

1. Right-click the category to be deleted.



2. Click Delete Category.

A warning message appears.

3. Click Yes.

The category is deleted.

Assigning Users to Categories

You can assign users to a category and assigning users to the category will give them write access to all sub-folders and codesets within the category.

To assign users to categories, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the **Codesets Workspace** pane, right-click the category to be assigned.

DATA INTELLIGENCE	SUITE Codeset Manager	
Enterprise Codesets	Codeset Mappings	
Codesets Workspace		
Enterprise Codes Environments Codesets APJ Demo EDW EDW CD10 EDW ICD10 ICD9 ICD9 New_Cat	Flat Files o New Sub Category Delete Category	Category Name Category Description
🖶 📲 New_Cat	 Export Codesets Delete Codeset(s) Export Category Codesets Import Codesets Assign Users 	Created By Created Date Time Last Modified By
		Last Modified Date

3. Click Assign Users.

			_	×
Jser ID		Assigned Users		
ks123 mboggs mread new_user_id public	•	+ + + +		
	-			-

- 4. Use (⇒ or ⇒) to move users from User ID box to Assigned Users box and use (← or ↔) to move users from Assigned Users box to User ID box.
- 5. Click 💾.

The users are assigned to the category.

Note: Follow the same procedure to add/remove users to/from the category.

Adding New Codesets

After creating a category, you can add codesets to enter codes.

Codesets store codes in a code value grid.

To add new codesets, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the **Codesets Workspace** pane, right-click the desired category.

DATA IN	ITELLIGENCE SUITE	Codeset M	anager
▲ Enterprise	Codesets Cod	deset Mappings	
Codesets Wo	rkspace	-	Category Details
	ICD 9 ICD 9 New_Cat New_Cat SAP ID D E ICD 10 ICD 9 ICD 10 ICD 9 ICD 10 ICD 10 ICD 10 ICD 9 ICD 9 I	lew Sub Categor Pelete Category	

3. Click New Codeset.

The New Codeset page appears.

• 🗄 New Codeset	_ 🗆 🗙
Codeset Name*	
Codeset Description	

4. Enter Codeset Name and Codeset Description.

For example:

- Codeset Name Country Codes
- Codeset Description This codeset has code names and code values for four countries.

5. Click

A new codeset is created and saved under the Codesets tree.

Once a codeset is created you can add codes to the code value grid in the following ways:

- Entering codes manually
- Importing codes from a MS Excel file
- Importing codes through a DB scan

Entering Codes Manually

After creating codesets, you can add codes manually in the code value grid.

To enter codes into code value grid manually, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the **Codesets Workspace** pane, click the required codesets.

The Code Value Grid appears.

DATA INTELLIGENCE SUITE Codeset Mo	anager					Search		٥	•		0	
Enterprise Codesets Codeset Mappings												•
Codesets Workspace 🗸	Category Details											*
E- 🗱 Enterprise Codesets	Code Value Grid											<
- 🕅 Environments E 🏭 Codesets	2					Profiles :	Default		•	53	×	
GOUGERS G	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Creat	ed By		Crec	:
EDW 												
B Billes_Codeset(1.00) B LCD 10 B Rew_Cat B New_Category B SAP												Associated Code Mapping Values
Published Codesets	4		25 rour	DOLD GOO							•	socia
Retired Codesets	IK K No Rei	cords Found	> >I 25 rows	hei haðe 🔺								NSS I

- 3. Click 🌌.
- 4. Click 🚳.

The New Code page appears.

🖓 New Code			_ _ ×
			≚ X
Code Name*		User Defined Field 3	
Code Value*			
Code Description		User Defined Field 4	
		User Defined Field 5	
System/Environment Name	Please select System/Environment	User Defined Field 6	
Start Date			
End Date		User Defined Field 7	
Activate User Defined Fields	ON	User Defined Field 8	
User Defined Field 1			
		User Defined Field 9	
User Defined Field 2			
		User Defined Field 10	
Note* : Date Format = MM/DD/Y	ΫΫΫ		

5. Enter appropriate values in the fields. Fields marked a with red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description					
Code Name	Specifies the code name.					
Code Marile	For example, Admin.					
Code Value	Specifies the code value of the code name.					
Code value	For example, 1.					
Code Description	Specifies the description about the code.					
Code Description	For example: The code value for Admin is 1.					
Custom / Emin	Specifies the system and environment related with the code.					
System/Envir- onment Name	For example, EDW.EDW-DEV.					
onment Name	Select the System/Environment name.					
	Specifies the start date of the code validity.					
Start Date	For example, 02/24/2020.					
	Enter the start date using 🔜.					
	Specifies the end date of the code validity.					
End Date	For example, 03/22/2021.					
	Enter the end date using 🛄.					
Activate User	Turn Activate User Defined Fields to ON to use the user defined					
Defined Fields	fields in the Code Value Grid.					
User Defined	You can use your own UI labels for user defined fields. For more					
Field 1-10	information on using UI labels for user defined fields, refer to the					
	Configuring Language Settings topic.					

6. Click 💾.

The codes are entered into the Code Value Grid.

Workspace 👻	Category Details										
erprise Codesets	Code Value Grid										
Environments Codesets	2						Р	rofiles : Profile_ABC		- 8	Ę
3rd Party Flat Files APJ Demo Data_Integration	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Extended Properties	Start Date		
EDW erwin DIS											
🖬 erwin bis 🗄 🚳 Codesets	Admin	1		Sales_Codeset	Project_System			View			
Project_System(1.00) Gles_Codeset(1.00)	Joe Villers	4		Sales_Codeset	Project_System			View			
L ICD 10	Kartik Sridhar	2		Sales_Codeset	Project_System			View			
ICD 9	Resource_Name	3		Sales_Codeset	Project_System	V		View			
ICD 9 N_Cat New_Cat New_Category SAP											

7. Use the following options:

Maximize

To maximise the Code Value Grid view, click

Export to Excel

To download the codeset, click a.

Managing codesets involves the following:

- Editing Codesets
- Copying Codesets
- Editing Code Value Grid
- Retiring Codesets

Importing Codes using MS Excel Files

You can import codes into Code Value Grid using .xlsx files. The .xlsx file template must be compatible with the Code Value Grid. Hence, you should download the template file, enter

the codes into it and then upload it into the Code Value Grid.

To import codes into Code Value Grid using MS Excel Files, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the Codesets Workspace pane, click the required codeset.

The Code Value Grid appears.

3. Click 🛋 to download the template file.

The template in .xlsx format is downloaded.

4. Enter the data in the template.

Note: Set the ACTIVE_FLAG column values to Y, and set the DELETE_FLAG column values to N.

You can use your own UI labels for user defined fields. For more information on using UI labels for user defined fields, refer to the Configuring Language Settings topic.

DATA INTELLIGENCE SUITE Codeset Mo	anager					Search		۹	۵	0	9
Enterprise Codesets Codeset Mappings											•
Codesets Workspace 👻	Category Details										*
E- Enterprise Codesets	Code Value Grid									1	: <
Environments Codesets	2					Profiles : [Default		- 5	: 🔊	
Grant Party Flat Files APJ Demo	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Create	d By	Cr	ec
 B = B = B = B = B = B = B = B = B = B =][1
Image: Solid Scoles and Sco											Associated Code Mapping Values
Published Codesets	•										ocia (
Retired Codesets	IK K No Rei	cords Found	> >I 25 rows	perpage 🖕							Ass

- 5. Click 🜌.
- 6. Click 💽.

The Import Excel page appears.



- 7. Browse the updated .xlsx file using Choose File.
- 8. Click 🛍.

The codes are uploaded into the Code Value Grid.

Once you upload the codes in the Code Value Grid, you can manage codesets and <u>managing</u> codesets involves the following:

- Editing Codesets
- Copying Codesets
- Editing Code Value Grid
- Retiring Codesets

Importing Codes into Code Value Grid using DB Scan

You can import codes into Code Value Grid by scanning a database. You need to enter connection parameters and establish a connection between the database and erwin DI Suite. Once the connection is established, write an SQL query to preview the desired data. You can select the desired columns and import them as codes into the Code Value Grid.

To import codes into Code Value Grid using DB scan, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the Codesets Workspace pane, click the required codeset.

The Code Value Grid page appears.

DATA INTELLIGENCE SUITE Codeset M	anager Search Q 🗘 🖉 🖪							
Enterprise Codesets Codeset Mappings								•
Codesets Workspace 🗸	Category Details							~
🖃 🏭 Enterprise Codesets	Code Value Grid							< <
- 👘 Environments - 🏭 Codesets	2				Profiles : Default	•	8 📓	
Srd Party Flat Files APJ Demo	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicato	ər 🛛
EDW E ICD 10 E ICD 9								
□ ■ New_Cat □ ■ Codesets								
A_Codeset(1.00)								lues
🔃 📲 SAP								 Associated Code Mapping Values
								de Map
								ted Cot
Published Codesets	•							• ociat
Retired Codesets	IK K No Re	cords Found	> >I 25 rows	per page 🖕				Ass

- 3. Click 🌌.
- 4. Click 📚 .

The Following page appears.

<	Quick Connection
	Metadata Browser Metadata Metadata A_System A_Environment AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks Bd Atlas Sales System Bd Bl Bl AdventureWorks AdventureWorks AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks AdventureWorks AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks AdventureWorks Bd AdventureWorks AdventureWorks
	Microstrateav

5. Expand the **Quick Connection** pane.

Quick Connection *Mandatary Fields DBType: * Select DB Type Driver Name: IP Address/Host Name:* Part:* Database Name:* System Name:* System Name:* Metadata Browser			
*Mandatory Fields *** DBType: * Select DB Type Driver Name:			
DBType: * Select DB Type Driver Name:	<	Quick Connection	
Driver Name: Driver Name: Port:* Database Name:* System Name:* Metadata Browser		*Mandatory Fields	* TEST
IP Address/Host Name:* Port:* Database Name:* System Name:*		DBType: *	Select DB Type
Port:* Database Name:* System Name:*		Driver Name:	
Database Name:* System Name:*		IP Address/Host Name:*	
System Name:*		Port.*	
Metadata Browser		Database Name:*	
Metadata Browser		System Name:*	
Meradata browser		Motedata Provincer	
	→	meradara Browser	

6. Enter appropriate values in the fields (connecting parameters). Fields marked with a red asterisk are mandatory. Refer to the following table for field description.

Field Name	Description
	Specifies the database type.
DBType	For example, Sql Server.
выуре	Select the database type from which you wish
	to scan codes.
	Specifies the JDBC driver name for connecting
	to the database.
Driver Name	For example, com
Driver Name	microsoft.sqlserver.jdbc.SQLServerDriver
	It is autopopulated depending on the DB type.
	You can also update the driver name.
	Specifies the IP address or server host name of
IP Address/Host Name	the database.
	For example, localhost.
Port	Specifies the port to connect with the database.

Field Name	Description
	For example: 1433 is the default port for a Sql Server database type.
Database Name	Specifies the database name being used to con- nect to the codeset.
	For example, ErwinDIS931.
System Name	Specifies the name of the system related with the codeset.
	For example, EDW.
	The name of the system should be same as provided in Metadata Manager.
Custom Environment	Specifies the name of the environment related with the codeset.
System Environment	For example, EDW-DEV.
Name	The name of the environment should be same as provided in Metadata Manager.
User Name	Specifies the user name to connect with data- base.
	For example, sa.
Password	Specifies the password to connect with data- base.
	For example, goerwin@1.
	Specifies the full JDBC URL that is used to estab- lish a connection with the database.
URL	For example, jdbc:sqlserver://SERVER_ NAME:PORT#;databaseName=DatabaseName
	It is autopopulated based on the other para- meters.

7. Click 🕅 to test the connection.

If connection is established then a success message pops up.

- 8. Write an SQL query in the **Query Panel** to fetch the required data from the database.
- 9. Click 🐭 to validate the query.
- 10. Click \Box to preview the data.
- 11. Double-click the Select CSMHeader Template cell of the desired column.

The columns of the Code Value Grid appears as an option list.

	DB Scan							- 🗆 ×
							Sat	
Q	very Panel			<	Quick Connection			•
	Select*from CAT_DIALOG_TAB				*Mandatory Fields		X TEST	
					DBType: *	Sql Server	Ţ	
					Driver Name:	com.micro	soft.sqlserver.jdbc.SC	
					IP Address/Host Name:*	localhost		
					Port:*	1433		
					Database Name:*	ErwinDIS93	1	
					System Name:*	A_System		
								•
					Metadata Browser			-
Q	uery Result							~
4	# CA	T_DIALOG_TAB_ID	CAT_DIALOG_PROFILE_ID	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROP	ERTIES	CREATED_BY	
	Sele		Code Value	Select CSMHeader Template	Select CSMHeader Tem	olate	Select CSMHeader T	emplat 🔺
1	1		Code Name 🔺	DefaultTab			Administrator	
2	2		Code Description System Environment Name	DefaultTab			Administrator	
3	3		Start Date	DefaultTab			Administrator	
4	4	l	ena Dale 🔹	DefaultTab			Administrator	
5	5		5	DefaultTab			Administrator	-
4								•
Ν	ote*: Only top 50 rows will be displayed in	in grid.						

12. Select the desired Code Value Grid column.

Note: You can select multiple columns from the database.

13. Click to import the selected columns into the **Code Value Grid**.

The selected columns are imported in the Code Value Grid.

Once you import the codes in the Code Value Grid, you can manage codesets and <u>managing</u> <u>codesets</u> involves the following:

- Editing Codesets
- Copying Codesets
- Editing Code Value Grid
- Retiring Codesets

Managing Codesets

Managing Codesets involves the following:

- Editing Codesets
- Copying Codesets
- Editing Code Value Grid
- Retiring Codesets

You can edit a codeset and update its name and description.

To edit codesets, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the Codesets Workspace pane, expand the required category.
- 3. Expand the **Codesets** node.
- 4. Right-click the desired codeset.

	Codeset M	anager		
Enterprise Codesets Cod	eset Mappings			
Codesets Workspace	-	Category	Details	
Enterprise Codesets		Code Val	ue Grid	
Environments		2		
	vstem(1.00) Coset(1.00) Code: Code	deset	a me	Code Value
B SAP	Publish			

5. Click Edit Codeset.

The Edit Codeset page appears.

Edit Codeset		_ 🗆 ×
		E ×
Codeset Name*	New_Codeset	
Codeset Description	desc	

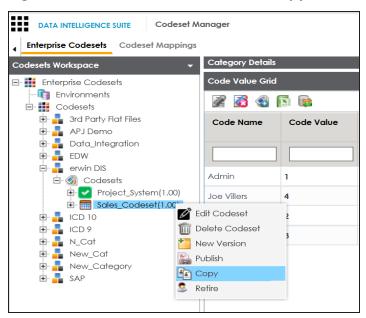
- 6. Edit the fields.
- 7. Click 💾.

The codeset is edited.

You can copy a codeset and paste it in another category.

To copy codesets and paste it in another category, follow these steps:

1. Right-click the desired codeset and click **Copy**.



2. Right-click the another category and click Paste.



The codeset is copied in the category.

You can edit codes in the Code Value Grid.

To edit codes in the Code Value Grid, follow these steps:

- 1. Click the desired codeset.
- 2. The Code Value Grid appears.

desets Workspace 🗸 🗸	Category Details										
Enterprise Codesets	Code Value Grid										<
Environments Codesets	2						F	rofiles : Profile_ABC	•	8	
3rd Party Flat Files APJ Demo Data_Integration	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Extended Properties	Start Date		
E EDW erwin DIS											
E 📫 erwin DIS E 🥘 Codesets	Admin	1		Sales_Codeset	Project_System			View			
Project_System(1.00)	Joe Villers	4		Sales_Codeset	Project_System			View			
E - 10	Kartik Sridhar	2		Sales_Codeset	Project_System			View			
E ICD 9	Resource_Name	3		Sales_Codeset	Project_System	\checkmark		View			
B New_Cat New_Category B SAP											

3. Click 🜌.

The codeset is locked.

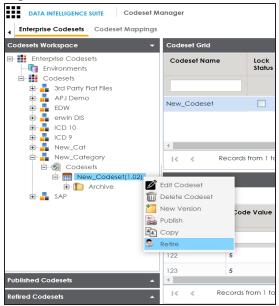
4. Double-click a cell in the Code Value Grid to edit the codes.

Note: When a user is editing the code value grid, it cannot be edited by other users.

You can also retire codesets which you do not need anymore. A retired codeset moves into the Retired Codesets pane and cannot be rolled back into Codesets Workspace.

To retire a codeset, follow these steps:

1. Right-click the desired codeset.



2. Click Retire.

A warning message appears.

3. Click Yes.

The codeset is retired and moves into the Retired Codesets pane.

DATA INTELLIGENCE SUITE Codeset Man	nager					Sec	arch	Q	¢ 0 8
Enterprise Codesets Codeset Mappings									•
Codesets Workspace	Summa	ıry							^
Published Codesets	#	Category Name	Category Hierarchy	Codeset Name	# of Active Codes	Created By	Created Date	Modified By	Modified Date
Retired Codesets ⇒	I	New_Category	New_Category	New_Codeset	erpage •	Administrator	2019-11-02 15:5	Administrator	2019-11-02 15:5¢

You can also publish codesets or create a new version of the codesets.

Versioning Codesets

You can version codesets and maintain legacy of codesets with a record of codeset changed description.

To create new versions of codesets, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the Codesets Workspace pane, right-click the required codeset.

Note: Ensure that the codeset is not in a locked state. A locked state means the codeset is in edit mode. Click to cancel edit mode.

	Codeset Mo	anager	
Enterprise Codesets Codes	et Mappings		
Codesets Workspace	-	Summai	r y
Enterprise Codesets		#	Category Name
Codesets Side Party Flat Files		1	SAP
APJ Demo		2	EDW
EDW		3	EDW
Codesets	em(1.00)	4	EDW
E Glass_Codes	Edit Cod		10 10
🗈 🔒 N_Cat	New Ver	sion	0 10
Image: Provide the second	B Publish		> 10
🗄 - 📲 SAP	Copy Retire		> 10
		10	ICD 9
		11	ICD 9

3. Click New Version.

The New Codeset Version page appears.

🎽 New Codeset Version	_ = ×
Codeset Name	New_Codeset
Codeset Version	1.02
Codeset Description	desc
Codeset Version Label	
Codeset Changed Description *	Metadata management
1	

4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field description.

Field Name	Description
	Specifies the name of the codeset whose version is being cre-
	ated.
Codeset Name Codeset Version	For example, Country Codes.
	It is autopopulated with the codeset name and cannot be
	edited.
	Specifies the new version of the codeset.
Codeset version	For example, 1.03.
	Specifies the description about the codeset.
	For example: This codeset has code names and code values
Codeset Description	for four countries.
	It is autopopulated with the codeset description and cannot
	be edited.
Codeset Version Label	Specifies the version label of the codeset.
	For example, Beta.
Codeset Changed	Specifies the description about the changes in the codeset.
Description	For example: Code Value for CANADA was changed to CAN.

5. Click 💾.

The new version is created and the older version is archived.

Deleting Codes and Codesets

You can logically delete codes and restore them back. You can also permanently delete codesets.

To logically delete codesets, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the **Codesets Workspace** pane, expand the required category.
- 3. Expand the Codesets node.
- 4. Click the codeset to be soft deleted.

The Code Value Grid appears

DATA INTELLIGENCE SUITE Codeset Ma	inager								Q	¢	08	
·	Category Details											•
	Code Value Grid											< <
Environments Codesets	Z 💰 🚳 (s 🖡					Profile	s: Profile_ABC	•	53	a 🛛	1
🗄 📲 3rd Party Flat Files 🗄 📲 APJ Demo	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Extended Properties	Start Do	ate		
E BUW												
Codesets	Admin	1		Sales_Codeset	Project_System			View				
Codeset(1.00) ICD 10	Joe Villers	4		Sales_Codeset	Project_System			View				
庄 🔒 ICD 9	Kartik Sridhar	2		Sales_Codeset	Project_System			View				
⊡- 📲 N_Cat ⊡- 🚳 Codesets	Resource_Name	3		Sales_Codeset	Project_System			View				
B Code_Set(1.00) B New_Cat B SAP Published Codesets	<	acords from 1 to 4	>>1 50 rows	Der Dage •								Associated Code Mapping Values

5. Select the **Delete Indicator** check box of a code to be logically deleted.

A warning message appears.

6. Click Yes.

The code is logically deleted and can be restored or purged.

To restore or purge logically deleted codes, follow these steps:

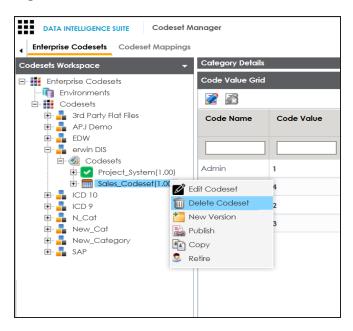
- 1. Click 鼳.
- 2. The Logically Deleted Codes page appears.

	leted Codes							- 5
5 🖳								
elect Rows	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Start Date	End Date
	Admin	1		Sales_Codeset	Project_System			
	Joe Villers	4		Sales_Codeset	Project_System			
	Kartik Sridhar	2		Sales_Codeset	Project_System			

- 3. Select the rows.
- 4. To delete the selected rows, click $\overline{\mathbf{s}}$.
- 5. To restore the selected rows, click $\overline{\mathbf{s}}$.

To permanently delete codesets, follow these steps:

1. Right-click the codeset to be deleted.



Note: You cannot delete a codeset which is in lock status. Lock status refers to a codeset which is in edit mode. To cancel edit, click 20.

2. Click Delete Codesets.

A warning message appears.

3. Click Yes.

The codeset is deleted.

Publishing Codesets

You can publish your codesets to an environment, hence it is important that you create the required publishing environments such as test, development, or production.

To create publish environments, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. Under the Codesets Workspace pane, right-click the Environments node.

lanage	٩r						
Codesets Workspace Publish Environments							
#	Environment Name						
nt	DEV						
2	PROD						
3	Production						
4	Test						
	# nt 2 3						

3. Click New Environment.

The New Environment page appears.

🎼 New Environment	_ 🗆 🗙
	li ×
Environment Name* :	

- 4. Enter Environment Name.
- 5. Click 💾.

A new publish environment is created and saved in the Publish Environments pane.

To publish codesets, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager>.
- 2. Under the **Codesets Workspace** pane, right-click the required codeset.

DATA INTELLIGENCE SUITE Codeset M	\anager	
Enterprise Codesets Codeset Mappings		
Codesets Workspace -	Sumn	nary
Enterprise Codesets	#	Category Name
 Codesets 3rd Party Flat Files 	1	SAP
APJ Demo	2	EDW
EDW 	3	EDW
	4	EDW
🖻 📲 New_Cat 🖻 🞯 Codesets	5	ICD 10
A Columnar		ICD 10
 Bernard Bernard Bernard	et	ICD 10
New Version		ICD 10
Publish		ICD 10
Сору		ICD 9
S Retire	11	

3. Click Publish.

The	Publish	Codesets	page	appears.	
					Ē

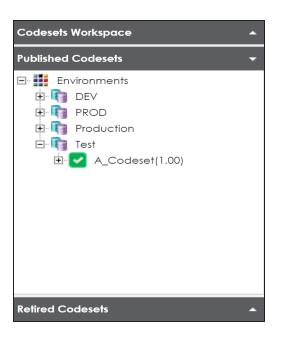
Publish Codeset		-	×
* Publishing the Codeset will create	a new version.		×
Codeset Name	A_Codeset		
Codeset Version	1.01		
Codeset Version Label			
Codeset Changed Description*			
Publish Environment*	DEV PROD Production Test		•

4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field description.

Field Name	Description				
	Specifies the name of the codeset which is being published.				
Codeset Name	For example, Country Codes.				
	It autopopulates with the codeset name and cannot be				
	edited.				
	Specifies the new version of the codeset.				
Codeset Version	For example, 1.03.				
	It autopopulates with the new version and cannot be edited.				
Codeset Version Label	Specifies the version label of the codeset.				
	For example, Beta.				
Codeset Changed	Specifies the description about the changes in the codeset.				
Description	For example: Code Value for CANADA was changed to CAN.				
	Specifies the publish environment to which the codeset is				
Publish Environment	being published.				
	For example, Production.				

5. Click 💾.

The codeset is published successfully and the published codesets move under Published Codesets pane.



Once the source and target codesets are published, you can create code mappings.

Note: You can create code mappings without publishing source or target codesets, but it is recommended that you create code mappings after publishing the codesets.

Maintaining Code Mappings

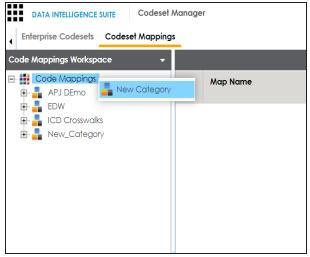
The Codeset Mappings section in Codeset Manager allows you to define and categorize code mappings. The process is standardized with ability to version and publish code mappings to various environments. Further, these published code mappings can be associated with data item mappings in the Mapping Manager.

Creating Code Crosswalks (Mappings)

You can create code crosswalks (mappings) of the source and target codesets in Codeset Manager. The codesets can have same or different code values. Auto-Map functionality enables you to map codesets having same code values. Codesets having different code values can be mapped using drag and drop method. A category can hold multiple code maps. Code maps are stored in a hierarchical manner, Category > Mappings. You can also create sub-categories under a category to provide one more level of categorization to mappings.

To create a category, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager > Codeset Mappings.
- 2. Under the **Code Mappings Workspace** pane, right-click the **Code Mappings** node.



3. Click New Category.

The New Category page appears.

🚪 New Category	_ 🗆 X
	₩ ×
Category Name * :	
Category Desc :	

Enter Category Name and Category Description.
 For example:

- Category Name EDW
- Category Description This category contains two code mappings, Gender Crosswalk and Marital Status Crosswalk.
- 5. Click 💾.

A new category is created and saved under the category tree.

To create sub-categories under a category, follow these steps:

1. Under the Code Mappings Workspace pane, right-click the required category.



2. Click New Sub Category.

The New Category page appears.

🚦 New Category		_ 🗆 X
	li ×	
Category Name * :		
Category Desc :		

3. Enter Category Name and Category Description.

For example:

- Category Name EDW-Finance
- Category Description This sub-category contains two code mappings, Gender Crosswalk and Marital Status Crosswalk.
- 4. Click 💾.

A new sub-category is created and saved under the sub-category tree.

You can use Auto-Map functionality to map source and target codesets having same code values.

To create code mappings when source and target codesets have same code values, follow these steps:

1. Right-click the desired category.

ode Mappings Workspace	↓ C	odeset N	apping Grid		
Code Mappings APJ DEmo C_Name C_Name C_Name C_Name C_Name		#	Source Category	Source Codeset	Source Codeset Version
- Integrated_Datc	🗩 New Sub Categ	jory	1		
• New_Category	 Edit Category Delete Categor 		in DIS	Sales_Codeset	1.00
	New Map	у	in DIS	Sales_Codeset	1.00
l	Import Legacy /	Maps	in DIS	Sales_Codeset	1.00
2	Assign Users		in DIS	Sales_Codeset	1.00

2. Click New Map.

The **New Codeset** Map page appears.

📲 New Codeset Map			_ 🗆 ×
		=	≝ ×
Codeset Map Name*			
Codeset Map Version	1.00		
Codeset Map Description			
Source Codeset		Source	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	les	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	•
Target Codeset		Target	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	es 🔺	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	•
Auto Map 🗌 *Auto n	napping occurs	for source and target codes having the same vo	lues.

3. Enter Codeset Map Name and Codeset Map Description.

For example:

- Codeset Map Name Gender Crosswalk
- Codeset Map Description The codeset map is the code mappings between the two codesets, Misc Gender Codes and Gender.
- 4. Select the Source Codeset/System and Target Codeset/System.
- 5. Select the Auto Map check box and click

A new code mapping is created and source and target codesets are mapped in the Codeset Mapping Grid.

ace 👻	Codes	et Mapping Grid						^	Codeset Tree
	2	2					9 🗟 🚱 🕯	ß	CodeSets Grant Files
	*	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID	:	APJ Demo APJ Demo Data_Integration G Odesets
								[E- 📰 Integrated_Co
1.00)	1	erwin DIS	Sales_Codeset	1.00	Project_System		710	A	1 22
	2	erwin DIS	Sales_Codeset	1.00	Project_System		711	J	- 1 44
	3	erwin DIS	Sales_Codeset	1.00	Project_System		712	К	🗉 🔒 EDW 🖃 🍶 erwin DIS
	4	erwin DIS	Sales_Codeset	1.00	Project_System		713	R	E- Ø Codesets
	<		1 to 4 🔉 🔅	25 rows per	page •			>	Gdes_Codeset Gdes_Codeset Gdes_Codeset Gdes_Codeset Gdes_Codeset Gdes_Codeset Gdeset Gde
			_					•	 N_Cat New_Cat New_Category
	·	M MapSpec Overview		egrated_Map		Ø			E- La SAP

6. Click \bigotimes to validate the code mapping.

You need to use drag and drop method to map codesets having different code values.

To create code mappings when source codesets and target codesets have different code values, follow these steps:

1. Right-click the category.

DATA INTELLIGENCE SUITE	Codeset A	Nanager			
Enterprise Codesets Co	deset Mappings				
Code Mappings Workspace	•	Codese	Mapping Grid		
Code Mappings APJ DEmo APJ DEmo C_Name D C_Name D C_NAME		#	Source Category	Source Codeset	Source Codeset Version
🖃 🚦 Integrated_Datc 🗄 藰 Mappings 💈	New Sub Cat	egory			
🗄 🔒 New_Category	-		in DIS	Sales_Codeset	1.00
	Delete Cateç	gory	in DIS	Sales_Codeset	1.00
	New Map	v Mans	in DIS	Sales_Codeset	1.00
5	Assign Users	,	in DIS	Sales_Codeset	1.00

2. Click New Map.

The New Codeset Map page appears.

📲 New Codeset Map			_ 🗆 🗙
			×
Codeset Map Name*			
Codeset Map Version	1.00		
Codeset Map Description			
Source Codeset		Source	
3rd Party Flat Files.Misc Marital Status Coo 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	des	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	-
Target Codeset		Target	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	des	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	<u>_</u>
	mapping occur	s for source and target codes having the same valu	ies.

3. Enter Codeset Map Name and Codeset Map Description.

For example:

- Codeset Map Name Gender Crosswalk
- Codeset Map Description The codeset map is the code mappings between the two codesets, Misc Gender Codes and Gender.
- 4. Select the Source Codeset/System.
- 5. Click

The source codesets details are updated in the Codeset Mapping Grid.

space 👻 Codes	et Mapping Grid						^	Codeset Tree
2	6					/ 🔊 🦻	ß	CodeSets 3rd Party Flat Files
*	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID	:	APJ Demo APJ Data_Integration E- G Codesets
							[E- 📰 Integrated_Co
1 (00	erwin DIS	Sales_Codeset	1.00	Project_System		710	A	- 1 22
2	erwin DIS	Sales_Codeset	1.00	Project_System		711	J	44
3	erwin DIS	Sales_Codeset	1.00	Project_System		712	к	EDW
4	erwin DIS	Sales_Codeset	1.00	Project_System		713	R	E 🕢 Codesets
	Records from	1 fo 4 🔉 :	25 rows per	page •			>	Gramma Codeset Gramma C
× <	Kocolus IIOIII							E 🚦 ICD 9

- 6. Click 🌌.
- 7. Scroll to right of the Codeset Mapping Grid to see the Target Code Value column.
- 8. In the Codeset Tree, expand the target category and the Codesets node.
- 9. Drag and drop the target codeset into the Code Set Mapping Grid under the Target Code Value column.

erprise Codesets Codeset Mappin	-												
Mappings Workspace 👻	Code	eset Mapping Grid							^	Codese			
Code Mappings APJ DEmo		<u>20</u>					<i>i</i>	2 🗟 🏹 🕄			CodeSet	s arty Flat File	es es
C_Name EDW ICD Crosswalks	me	Source Code Value	Target Code Value	Target Code Name	Target Code ID	Target Code Descriptic	Target System/Environment	Target Codeset	Targe Versi	÷	🔒 APJ D	lemo Integration	
🚦 Integrated_Data		1	Integrated_0	Codeset							÷- 🚃	Integrate	d_
Mappings Integrated_Map(1.00)		4									EDW	DIS	
🗄 🛃 Map1(1.00)		2								.	ICD 1	0	
New_Category										<u>ا</u>	ICD 9		
		3									N_Ca	Cat	
ren_oongar)		3									New_	t Cat Category	
ren_oorger)	<	3							>		New_	Cat	
(ren_ounger)	<	3 ISM MapSpec Overview							>		New_	Cat	
- no _onogory	<		-	_			Ø		>		New_	Cat	

10. Click 📕.

The code mappings are successfully saved.

11. Click 🥙 to validate the code mapping.

The code map is validated. Ensure that all the desired codes are mapped.

Use the following options:

Export

To download the code map details in .xlsx format, click 🗐.

Extend Mapping Grid

To extend the Codeset Mapping Grid, click

Once the code map is created, you can:

- Edit Code Mappings
- Create new version of the code map
- Publish and associate the code map with data item mappings

Managing Categories

Managing categories involves:

- Updating categories
- Deleting categories

You can update category name and its description as per your requirements.

To update categories, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager > Codeset Mappings.
- 2. Under the **Code Mappings Workspace** pane, right-click the desired category.

DATA INTELLIGENCE	SUITE Codeset /	Manage	ər					Search		Q 🗢 🛛 🖪
Enterprise Codesets	Codeset Mapping									•
Code Mappings Workspo	ice 👻									~ <
Code Mappings APJ DEmo		#	Map Name	Lock Status	Locked By	Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time
EDW	2									
- New_Categor	y 💦 New Sub Cat									
	Edit Category									_
	📲 New Map									_
	Minport Legac	y waps								_
		4								Codeset Tree
										odese
Published Code Mapping	js 🔺									^ ⁽⁾

3. Click Edit Category.

The Edit Category page appears.

Edit Category		_ ¤ ×
		li ×
Category Name* :	New_Category	
Description :	desc	

- 4. Edit the fields.
- 5. Click

The category is updated.

To delete categories, follow these steps:

1. Right-click the category to be deleted.

DATA INTELLIGENCE SU	UITE Codeset	Manag	er					Search		২ 🗘	0	2
Enterprise Codesets	Codeset Mapping	s										•
Code Mappings Workspac	:e -										^	<
Code Mappings APJ DEmo		#	Map Name	Lock Status	Locked By	Description	Created By	Created Date Time	Last Modified By	Last Modi Date Time		
B C_Name B EDW B EDW B F CD Crosswalks P New_Category B Ø Mappings		y gory	5									
		4									÷	Tree
												Codeset Tree
Published Code Mappings	· •										^	Ŭ

2. Click Delete Category.

A warning message appears.

3. Click Yes.

The category is deleted.

Note: You cannot delete a category if it contains Code Maps or Sub-Categories.

Editing Code Mappings

You can update source codesets and target codesets in the Codeset Mapping Grid.

To update source codesets in the Codeset Mapping Grid, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager > Codeset Mappings.
- 2. Under the Code Mappings Workspace pane, expand the desired category.
- 3. Expand the Mappings node.
- 4. Click the desired code map.

The Codeset Mapping Grid and CSMMapSpec Overview pane appears.

Aappings Workspace	- Codes	et Mapping Grid						^ C	odeset Tree
Code Mappings APJ DEmo		<i>2</i> 3					/ 🔊 🦻	53 E	- <mark># CodeSets</mark> :
C_Name EDW ICD Crosswalks Integrated_Data	*	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID	S	APJ Demo APJ Demo Data_Integratio EDW erwin DIS
- Mappings	1	erwin DIS	Sales_Codeset	1.00	Project_System		710	Ac	 ICD 10 ICD 9 N_Cat
New_Category	2	erwin DIS	Sales_Codeset	1.00	Project_System		711	oL	🗉 🔒 New_Cat
	3	erwin DIS	Sales_Codeset	1.00	Project_System		712	Kc	New_Category SAP
	4	erwin DIS	Sales_Codeset	1.00	Project_System		713	Re	E
		Records from M MapSpec Overview eset Map Name	1 to 4 > ;	> 25 rows per	page •	Ľ		>	

5. In CSM Mapping Overview, click 🖉.

You can update Codeset Map Name and Codeset Map Description.

Note: You cannot edit Codeset Map Version.

- 6. Select the new Source Codeset and Source System/Environment.
- 7. Select the Target Codeset and Target System/Environment.
- 8. Click 💾.

The Codeset Mapping Grid is updated with the new source codeset. But, the target codeset doesn't update in the Codeset Mapping Grid. You need to drag and drop target codeset from the Codeset Tree to Codeset Mapping Grid.

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	Codeset Ma	p Version	1.00								
	Codeset Ma	o Description	Code map when so	ource and target h	ave different code value	3 \$.					
Published Code Mappings								~			

To update target codeset in the Codeset Mapping Grid, follow these steps:

1. In the Codeset Mapping Grid, click 🧖.

Note: The Codeset is locked and other users cannot make changes.

- 2. In the Codeset Tree, expand the target category and the **Codesets** node.
- 3. Drag and drop the target codeset into the Code Set Mapping Grid under the Target Code Value column.
- 4. Click 💾.

The target codeset is updated in the Codeset Mapping Grid.

To update target code values in the Codeset Mapping Grid, follow these steps:

- 1. In the Codeset Mapping Grid, click 🜌.
- 2. Double-click a cell under the Target Code Value column and update it with the one of the options available.

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3. Click 💾.

The target code values are updated.

Versioning Code Mappings

You can create versions of code mappings and track legacy of a code map.

The new version is available in the Code Mappings Workspace under the Mappings tree.

To create new versions of code mappings, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager > Codeset Mappings.
- 2. Under the Code Mappings Workspace pane, right-click the required codeset map.

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Code Mappings APJ DEmo C_Name	# Map Name	Lock Status	Locked By	Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	ر 🗄 🗄 ا	ard Party I		
B ■ EDW B ■ CD Crosswalks D ■ New_Category B ⊕ Mappings B ■ New_Codeset_Map(1,01)	Delete Map New Version								 	erwin DIS CD 10	egory	
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Published Code Mappings								^				

- 3. Click New Version.
- 4. The New Codeset Map Version page appears.

🎽 New Codeset Map Version		_ 🗆 🗙
	li ×	
Codeset Map Name*	New_Codeset_Map	
Codeset Map Version	1.02	
Codeset Map Description		
Map Version Label		
Map Changed Description*		

5. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Codeset Map	Specifies the name of the codeset map.
Name	specifies the name of the codeset map.

Field Name	Description
	For example, Gender Crosswalk.
Codeset Map	Specifies the new version of the codeset map.
Version	For example, 1.02.
Codecat Mar	Specifies the description about the codeset map.
Codeset Map Description	For example: The codeset map is the code mappings between the two
Description	codesets, Misc Gender Codes and Gender.
Map Version	Specifies the version label of the codeset map.
Label	For example, Beta.

6. Click

The new version is created and saved in the Mappings tree while the older version is archived.

Associating Code Maps with Data Item Mappings

Before associating a code mapping with a data item mapping, you need to publish the code map.

Associating code mappings with data item mappings involves:

- Publishing code maps in the Codeset Manager
- Associating code maps with data item mappings in the Mapping Manager

To publish code maps, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager > Codeset Mappings.
- 2. Under the **Code Mappings Workspace** pane, right-click the required map.

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The Publish Codeset Map page appears.

🖹 Publish Codeset Map	_ = ×
	⊨ ×
Codeset Map Name*	Integrated_Map
Codeset Map Version	1.01
Codeset Map Description	Code map when source and target have different code values.
Map Version Label	
Map Changed Description*	Updated Code Values.
Publish Environment*	DEV PROD Production Test

3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

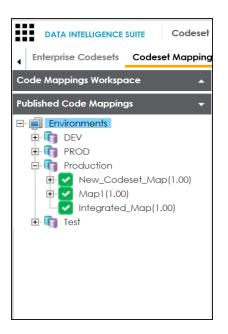
Field Name	Description				
Codeset	Specifies the name of the code map.				

Field Name	Description
Map Name	For example, Gender Crosswalk.
Codeset	Specifies the new version of the code map.
Map Version	For example, 1.02.
Codeset	Specifies the description about the code map.
	For example: The codeset map is the code mappings between the two codesets, Misc Gender Codes and Gender.
	Specifies the version label of the code map. For example, Beta.
Map Changed Description	Specifies the description about the changes made in the code map. For example: Code values were updated.
Publish Envir onment	Specifies the environment where the code map is being published. For example, test. You can create publish environments in Enterprise Codesets. For more information on creating publish environments, refer to the <u>Publishing</u> <u>Codesets</u> topic.

4. Click

The codeset map is published and it can be found in the Published Code Mappings pane under the selected Publish Environment.

A new version of the codeset map is created under the Mappings tree.



A published code map can be associated with a mapping in the Mapping Manager. The published code map is available under the Code Mappings Catalogue.

To associate published code maps with data item mappings, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. Under the **Workspace Mappings** pane, click the required map.

The center pane shows the mapping specification.

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- 3. In Mapping Specification, click **2**.
- 4. Right-click Header Menu and select the CSM Mapping check box.

The CSM Mapping Column appears in the Mapping Specification.

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5. On right pane, expand **Code Mapping Catalogue**.

- 6. Expand the required category, which contains the code crosswalks to be associated with the data item mapping.
- 7. Drag the code map into **Mapping Specification** and drop it under the **CSM Mapping** column in the required row.

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 APJ_Demo (1) B_Project (2) B8T (1) 	Administrator	2019-10-21 14:36:15.057	Integrated_Map(1	1.00) ^{hinistrator}	2019-12-10 14:49:07.187	^	 ICD Crosswalks Integrated_Data Mappings 	Map(1.00)
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8. In Mapping Specification, Click 🔜.

The code map is associated with the data item mappings.