erwin Data Intelligence Suite

AIMatch Guide

Release v10.1

Legal Notices

This Documentation, which includes embedded help systems and electronically distributed materials (hereinafter referred to as the "Documentation"), is for your informational purposes only and is subject to change or withdrawal by erwin Inc. at any time. This Documentation is proprietary information of erwin Inc. and may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of erwin Inc.

If you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all erwin Inc. copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to erwin Inc. that all copies and partial copies of the Documentation have been returned to erwin Inc. or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, ERWIN INC. PROVIDES THIS DOCUMENTATION "AS IS" WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL ERWIN INC. BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF ERWIN INC. IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is erwin Inc.

Provided with “Restricted Rights.” Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19 (c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2020 erwin Inc. All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

Contact erwin

Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

Access the erwin support site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for erwin Data Intelligence Suite (DI Suite), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit http://erwin.com/.

Provide Feedback

If you have comments or questions, or feedback about erwin product documentation, you can send a message to distechpubs@erwin.com.

erwin Data Modeler News and Events

Visit www.erwin.com to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

Contents

Legal Notices **2**

Contents **5**

AIMatch **6**

Associating Metadata for AI Matching 7

Configuring AIMatch Job 9

Associating Table Matches 10

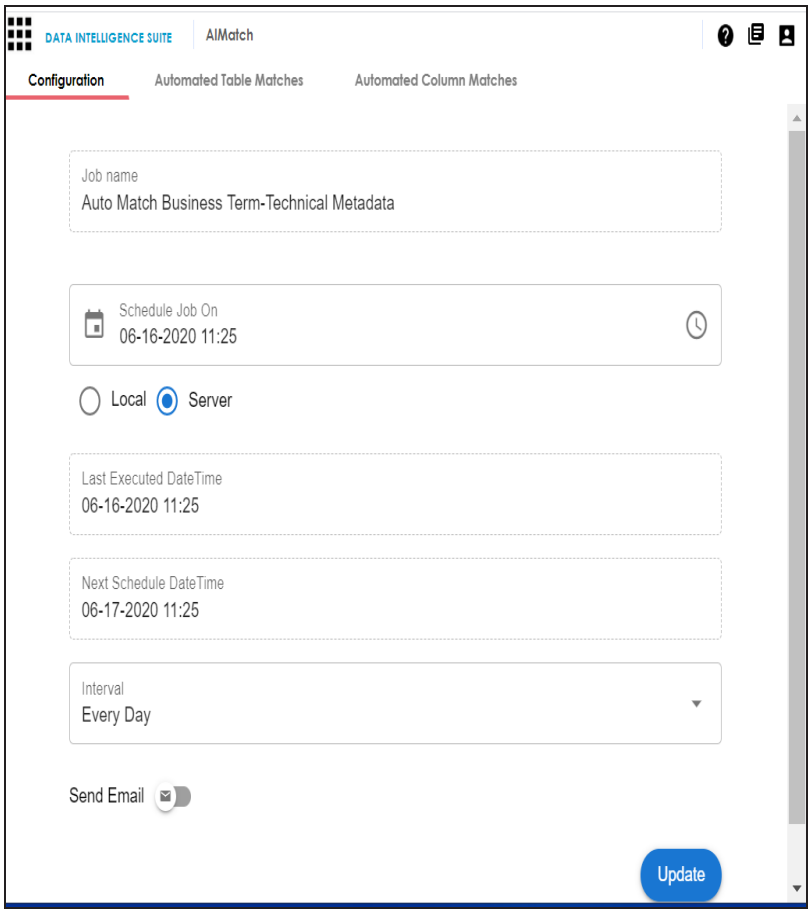
Associating Column Matches 13

AIMatch

The AIMatch engine automatically finds and suggests best possible table and column matches scores for business terms. These suggestions are scored based on their relevancy against business terms. Based on the match scores, you can then select and associate tables and columns with business terms.

To access AIMatch, go to **Application Menu** > **Data Literacy** > **AIMatch**.

The AIMatch page appears. By default, the Configuration tab opens.



Using the AIMatch engine involves:

1. Associating metadata for AI matching
2. Configuring AIMatch job
3. Associating table and column matches

Associating Metadata for AI Matching

Before scheduling an AIMatch job, you need to associate metadata to business term catalogs in the Business Glossary Manager. When the AIMatch job runs, the AIMatch engine finds matches between the associated metadata and business terms in the catalogs.

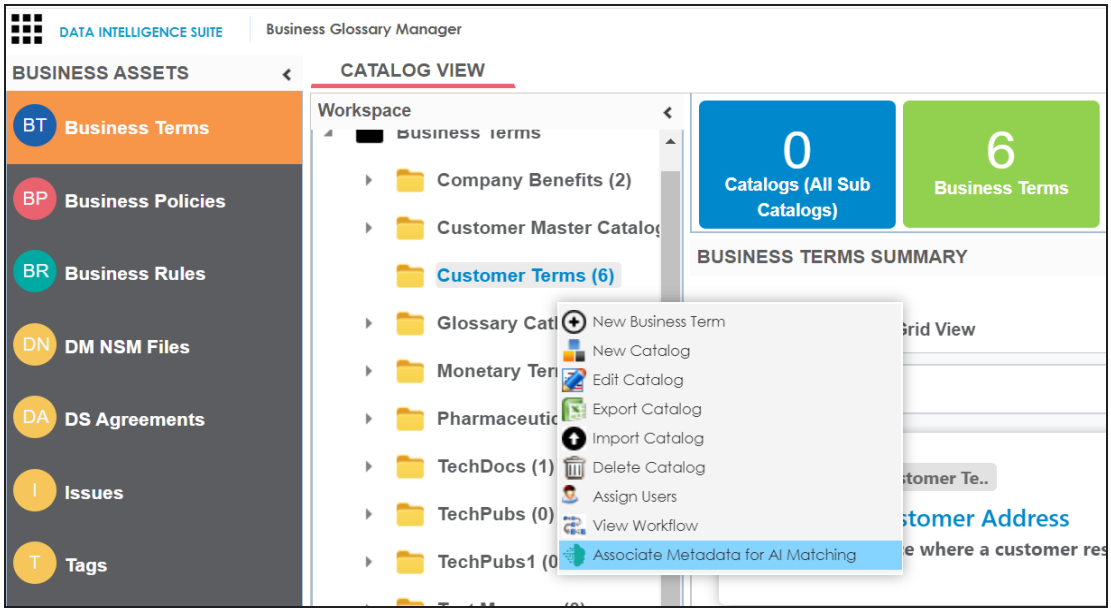
To associate metadata for AI matching, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.

   By default, the business terms view is displayed in the Workspace pane.

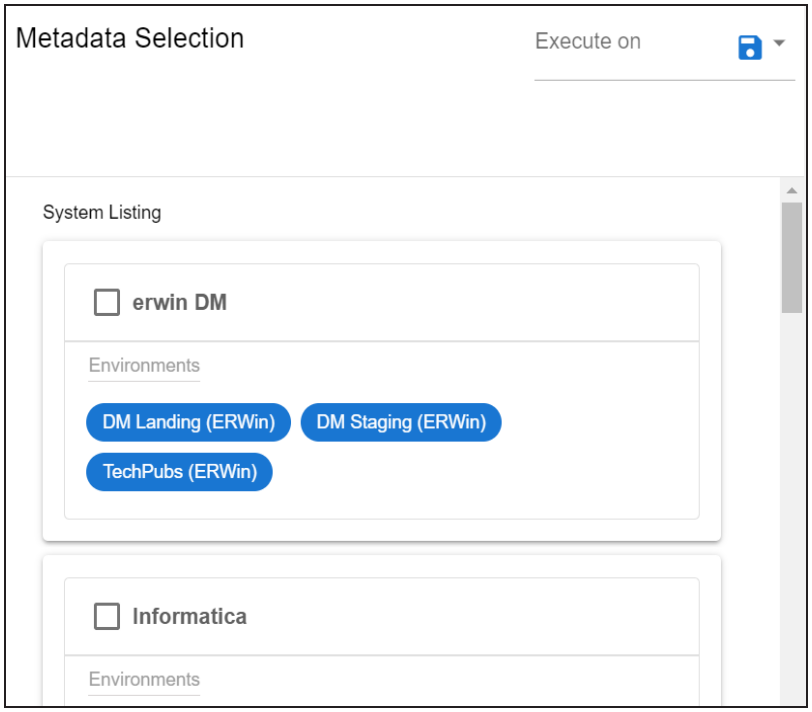
2. In the **Workspace** pane, right click the required catalog.

   The options available for the catalog appear.



3. Click **Associate Metadata for AI Matching**.

   The Metadata Selection page appears. It displays a list of systems available in your erwin Data Intelligence Suite (DI Suite) ecosystem.



4. Under **System Listing**, select the required systems and environments.
5. From the **Execute on** list, select one of the following options:
    - Both: Use this option to use both, table and column names under the selected systems and environments to find matches.
    - Table Name: Use this option to use table names under the selected systems and environments to find matches.
    - Column Name: Use this option to use column names under the selected systems and environments to find matches.
6. Click .

    The selected metadata is associated with the catalog.

Once metadata is associated with catalogs, you can schedule an AIMatch job to find matches between the associated metadata and business terms in the catalogs. For more information on scheduling AIMatch job, refer to the Configuring AIMatch Job topic.

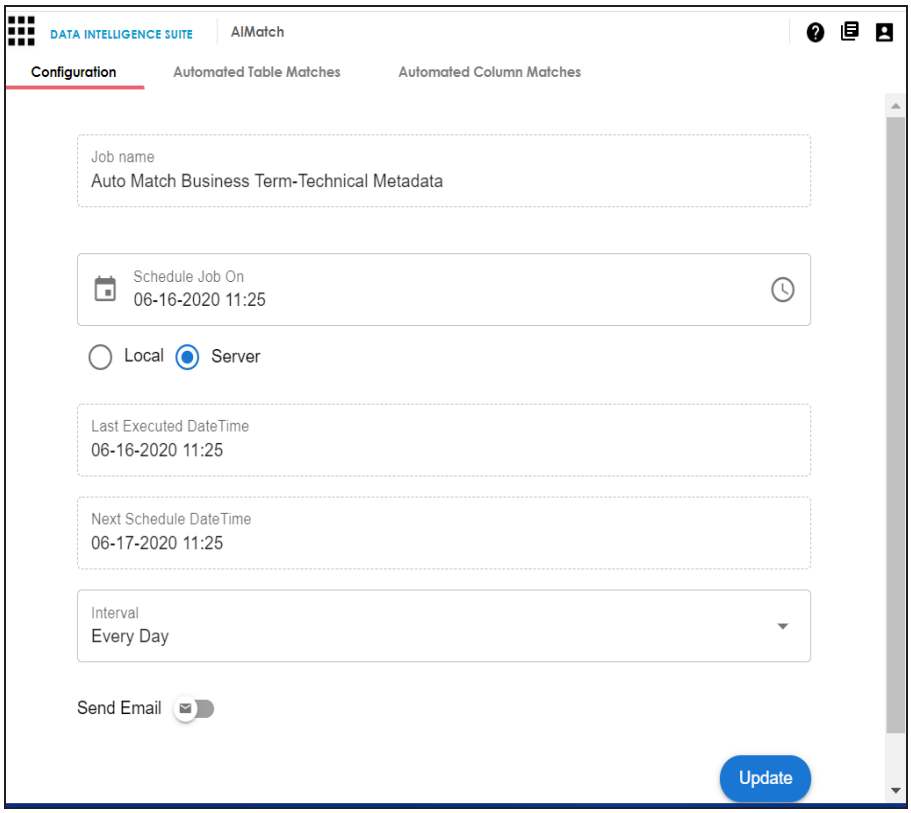
Configuring AIMatch Job

After associating metadata to business term catalogs, you can schedule an AIMatch job to find matches between the associated metadata and business terms. The job also scores the matches based on their relevancy.

To schedule AIMatch job, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **AIMatch**.

   The AIMatch page appears. By default, the Configuration tab opens.



2. Enter or select appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Job Name	Specifies the job name. For example, Auto Match Business Term-Technical Metadata.

Field Name	Description
	This field autopopulates with a job name and cannot be edited.
Schedule Job On	Set the date and time of the job using and . For example, 03-24-2020 11:45.
Local or Server	Select whether the job uses local or server time. ▪ Local: Refers to your local machine. ▪ Server: Refers to the machine where your application is deployed.
Last Executed Date Time	Specifies the date and time when the job was run last. For example, 06-15-2020 09:13
Next Sched-uled Date Time	Specifies the date and time when the job will run next. For example, 06-16-2020 09:13
Interval	Specifies the frequency of the job. You can run the AIMatch job daily, weekly, or monthly.
Send Email	Switch **Send Email** on ( ) to enable email notifications about the job. **Email Id**: It is autopopulated with your email ID. **CC Email Id(s)**: Enter email IDs that should receive email notifications about the job. For example, talon.smith@mauris.edu.

3. Click **Update**.

The job is scheduled, and is executed at the scheduled date and time. The resultant matches for tables and columns are available on the Automated Table Matches and Automated Column Matches tabs.

You can select and associate tables and columns with business terms based on the match scores.

Associating Table Matches

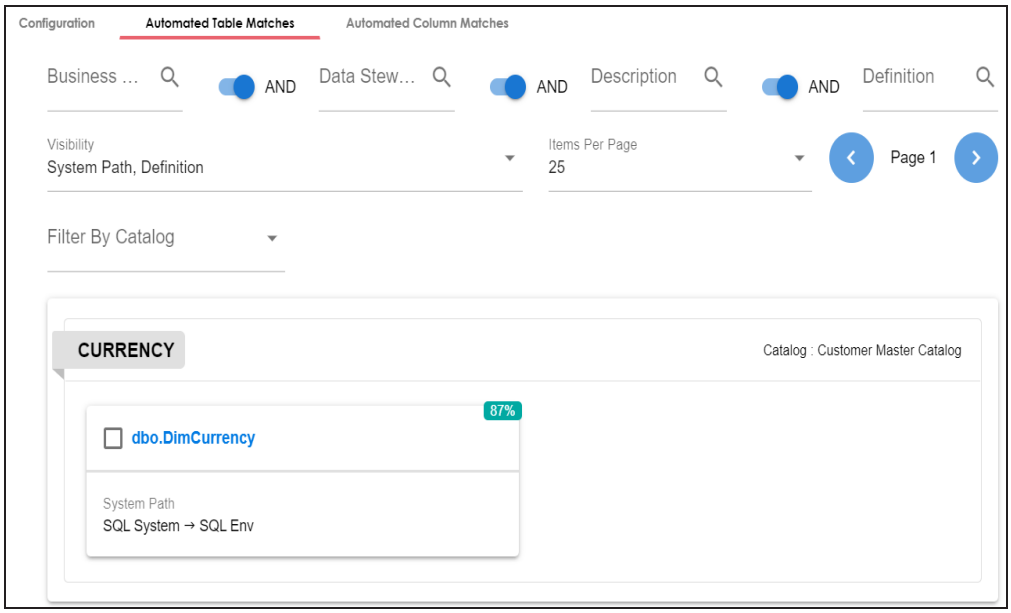
After the AIMatch job runs, the resultant matches for tables are available on the Automated Table Matches tab in the card format. Each match card displays a match score in

percentage based on the relevancy between tables and business terms.

To associate tables with business terms using the automated table matches, follow these steps:

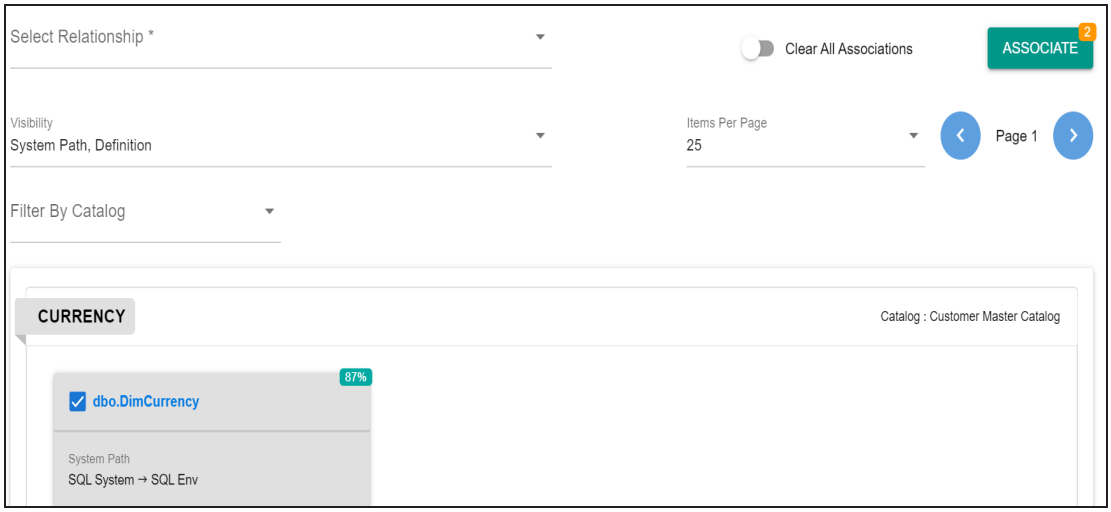
1. Go to **Application Menu** > **Data Literacy** > **AIMatch** > **Automated Table Matches** tab.

   Table matches with their match score in percentage appear in the card format.



2. Select the required table matches.

   This enables the Select Relationship list and the Association button.



3. From the **Select Relationship** list, select the relationship between tables and business terms.
4. Click **Associate**.

   The selected tables are associated with the business terms.

You can also refine the available matches using the filters and visibility options.

Filter

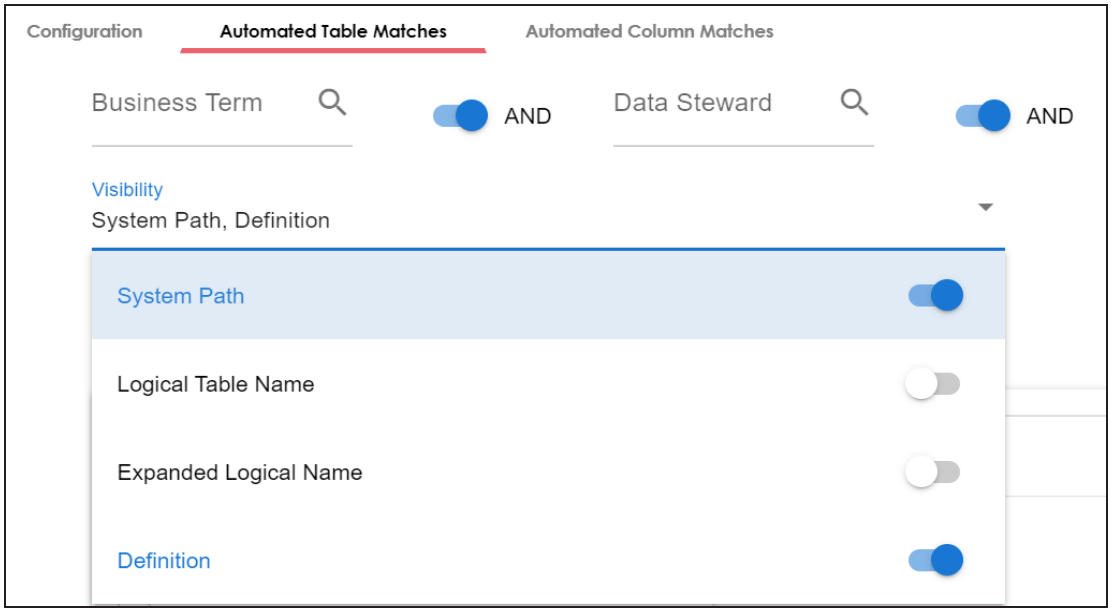
You can filter the table match cards based on AND or OR combinations of Business Term, Data Steward, and Description. You can also filter the table match cards based on Catalog.

Visibility

You can control the visibility of information on the table match cards.

To control the visibility of information on table match cards, use the drop down options under **Visibility**.

For example, in the following image, it is opted to view System Path and Definition on the table match cards.



You can also clear the associations between tables and business terms. To clear the associations, switch **Clear All Associations** on ( ).

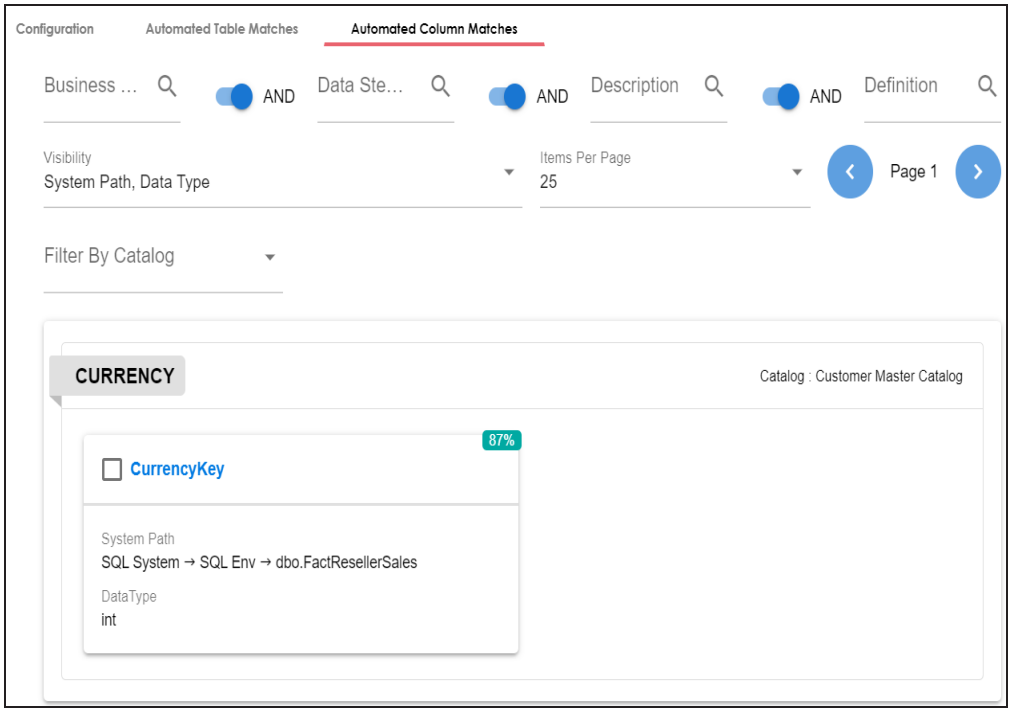
Associating Column Matches

After the AIMatch job runs, the resultant matches for columns are available on the Automated Column Matches tab in the card format. Each match card displays a match score in percentage based on the relevancy between columns and business terms.

To associate columns with business terms using the automated column matches, follow these steps:

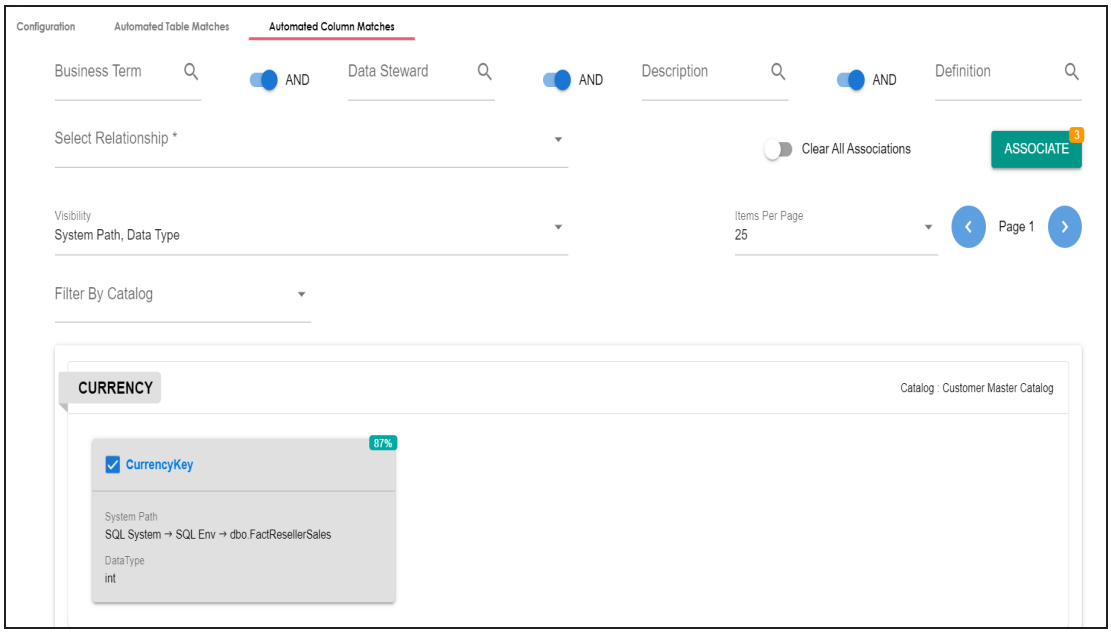
1. Go to **Application Menu** > **Data Literacy** > **AIMatch** > **Automated Column Matches** tab.

   Column matches with their match score in percentage appear in the card format.



2. Select the required column matches.

   This enables the Select Relationship list and the Association button.



3. From the **Select Relationship** list, select the relationship between columns and business terms.
4. Click **Associate**.

   The selected columns are associated with the business terms.

You can also refine the available matches using the filters and visibility options.

Filter

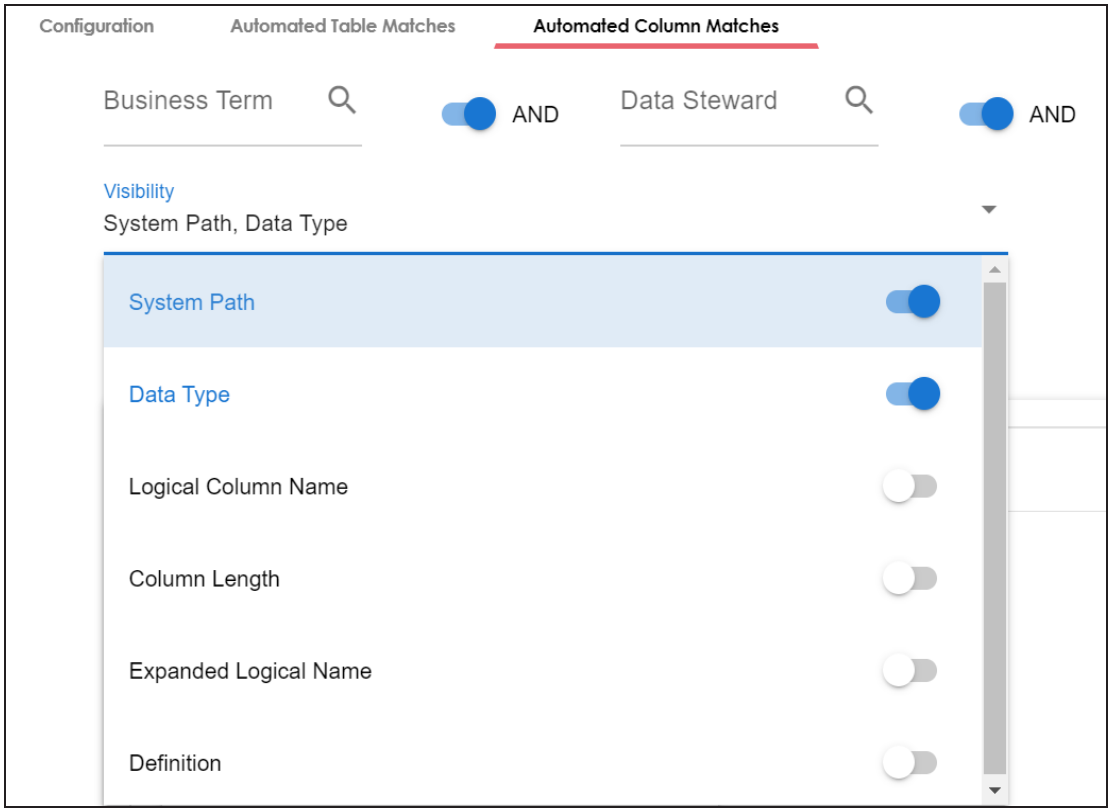
You can filter the column match cards based on AND or OR combinations of Business Term, Data Steward, and Description. You can also filter the column match cards based on Catalog.

Visibility

You can control the visibility of information on the column match cards.

To control the visibility of information on column match cards, use the drop down options under **Visibility**.

For example, in the following image, it is opted to view System Path and Data Type on the column match cards.



You can also clear the associations between columns and business terms. To clear the associations, switch **Clear All Associations** on ( ).