

erwin Data Intelligence Suite

Mapping Management 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 <u>erwin support</u> 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 <u>erwin Data Intel-</u> <u>ligence Suite (DI Suite)</u>, 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 <u>http://erwin.com/</u>.

Provide Feedback

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

erwin Data Modeler News and Events

Visit <u>www.erwin.com</u> 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	
Contents	
Managing Mappings	
Using Mapping Manager	
Creating and Managing Mapping Specifications	
Creating Projects	15
Adding Documents	
Assigning Users	
Configuring Extended Properties	
Setting Up Collaborations	
Managing Topics	
Creating Subject Areas	
Subject Areas	
Nested Subject Areas	
Managing Subject Areas	
Defining Transformations	
Configuring Transformation Library	
Uploading Transformations	43
Downloading Templates	
Managing Transformations	
Creating Maps	
Drag and Drop	

Creating Mapping Specifications	
Setting Target Update Strategy	54
Graphical	56
Creating Mapping Specifications	
Setting Target Update Strategy	59
Auto-Map	61
Creating Mapping Specifications	61
Setting Target Update Strategy	64
Adding Transformations	65
One to Many and Many to Many Mapping Specifications	68
Creating Mapping Specifications	
Setting Target Update Strategy	69
Adding Transformation and Lookup Details	
Adding Transformation Details	72
Adding Lookup Details	77
Graphical Designer	79
Adding Transformation Details	79
Adding Lookup Details	83
Updating Mapping Specifications Manually	85
Uploading Mapping Specifications in XML	
Specifying XPath in Mapping Specifications	91
Setting Column Order and Visibility	94
Column Order	94

Column Visibility	94
Updating Additional Mapping Information	
Updating Map Spec Overview	
Updating Source Extract SQL	102
Setting Target Update Strategy	104
Updating Testing Notes	
Adding Mapping Specification Documents	
Assigning Mapping Specifications to Users	
Linking Additional Specification Artifacts	113
Recording Level of Effort	115
Viewing Change Logs	117
Viewing Release Information	118
Setting Up Collaborations	119
Configuring Extended Properties	
Branching and Merging Maps	
Branching Maps	125
Merging Changes into Parent Maps	
Deleting Maps	131
Viewing Workflow Logs	
Analyzing Mappings	
Generating Virtual Preview of Targets	
Previewing Data	
Performing Table Gap Analysis	

Performing Column Gap Analysis	
Running Impact Analysis	
Running Lineage Analysis	
System	
Viewing Lineage	
Working on Lineage	
Environment	
Viewing Lineage	
Working on Lineage	
Table	
Viewing Lineage	
Working on Lineage	
Column	
Viewing Lineage	
Working on Lineage	
Running End to End Lineage	
Opening Business View	
Viewing Mapping Statistics	
Associating Mappings	
Associating Code Maps with Data Item Mappings	
Publishing Code Maps	
Associating Code Maps	
Associating Reference Tables with Mappings	

Linking Requirements to Mappings	
Publishing and Creating Versions of Mappings	
Creating Versions of Maps	
Base-lining Projects	
Comparing Two Different Mapping Versions	
Publishing Mappings	217
Publishing Mappings	
Updating Publishing Details	
Restoring Archived Maps As Active	
Exporting Mapping Specifications	
Proprietary XML Format	
ETL Jobs	
Creating and Managing Test Cases for Mappings	
Creating Test Cases	
Creating Project-Level Test Cases	
Creating Map-Level Test Cases	
Adding Validation Steps	
Adding Validation Steps to Project-Level Test Cases	
Adding Validation Steps to Map-Level Test Cases	
Adding Documents	
Adding Documents to Project-Level Test Cases	
Adding Documents to Map-Level Test Cases	
Managing Test Cases	

Managing Project-Level Test Cases	
Managing Map-Level Test Cases	
Viewing Mapping Manager Dashboard	
Statistics	
Mapping Summary	
Mapping Status	
Proactive Impact Analysis - Truncation Impacts	
Project Overview	
Mapping Classification	
Mapping Assignments	
Sources/Targets Not Mapped	
Test Case Status	
Project Test Cases	
User Test Cases	

Managing Mappings

This section walks you through managing source to target mappings in the Mapping Manager.

Mapping Manager is the core of erwin Data Intelligence Suite (DI Suite), where you do the following:

- Source to target mappings using the Metadata Catalogue
- Associate crosswalks to mappings using the Code Mapping Catalogue
- Associate reference data to mappings using the Reference Table Catalogue
- Associate requirements to mappings using the Specification Artifact Catalogue
- Create new mapping versions
- Specify test cases

Once mappings are approved for coding, ETL developers can export them as coding requirements. They can also export the mappings to XML and automatically generate ETL/ELT jobs for ETL tools, such as Informatica PowerCenter, IBM DataStage, Microsoft SQL Server SSIS, and so on.

For further information on accessing and using the Mapping Manager, refer to the <u>Using</u> <u>Mapping Manager</u> topic.

Using Mapping Manager

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

ace Mappings	Projec	t Summary								
appings Transformations Projects	*	Project Name	Project Description	Project Owner	Subjects Count	Mapping Count	Created By	Created Date Time	Last Modified By	Last Moa Time
ABC (2)										
- 🚦 dgfd (0) - 📲 DigitalAdoption (0)	1	Lineage Demo			0	12	Administrator	2020-02-26 04:01:32.913	Administrator	2020-02-26 04:01:32.913
erwinDIS (5)	2	Test Source			0	3	Administrator	2020-02-26 04:02:38.79	Administrator	2020-02-26 04
 Lineage Demo (12) Project (4) 	3	TestData Map			0	30	Administrator	2020-02-26 04:03:32.11	Administrator	2020-02-26 04
project 1 (4)	4	TestMap			0	3	Administrator	2020-02-26 04:04:19.267	Administrator	2020-02-26 04:04:19.267
Tech Pubs Online (6)	5	WhatfixTrial			0	0	Administrator	2020-03-16 05:30:34.073	Administrator	2020-03-16 05:30:34.073
 	6	WhatfixIntegration	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top: -1000px;"></iframe>		0	0	Administrator	2020-03-16 06:12:05.843	Administrator	2020-03-16 06:12:05.843
	7	ABC	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top: -1000px;"></iframe>		0	2	Administrator	2020-03-17 05:34:23.33	Administrator	2020-03-17 05
	8	TechPubs			0	6	Administrator	2020-04-15 09:56:37.803	Administrator	2020-04-15 09:56:37.803
	9	Tech Pubs Online	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top: -1000px;'></iframe>		0	6	Administrator	2020-04-23 07:28:42.863	Administrator	2020-04-23 07:28:42.863
	10	+t	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height:</iframe>		^			2020-04-23		2020-04-23
	Mana	ing Manager Dashbo	and							

UI Section	Function
1-Workspace Mappings	Use this pane to browse and work on projects and mappings.
2-Central Pane	Based on your selection in the browser pane, use this pane to view or work on the data.
3-Mapping Manager Dashboard	Use this pane to view statistics related to mappings and projects.
4-Published Mappings	Use this pane to view and export details of published mappings.

Managing mappings involves the following:

- Creating and managing mapping specifications
- Analyzing mappings
- Associating mappings
- Publishing and creating mapping versions

- Exporting mapping specifications
- Creating and managing test cases for mappings
- Viewing mapping manager dashboard

Creating and Managing Mapping Specifications

After defining systems and uploading metadata in the Metadata Manager, you can create mapping specifications. The Mapping Manager offers multiple ways to create mapping specifications. This section walks you through building metadata driven source to target mapping specifications and enterprise standards to manage them.

Creating and managing mapping specifications involves:

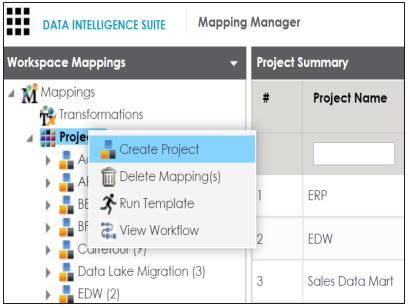
- Creating projects
- Defining transformations
- Creating maps
- Adding transformations and lookup details
- Updating mapping specifications manually
- Uploading mapping specifications in XML format
- Specifying XPath in mapping specifications
- Setting column order and column visibility
- Updating additional mapping information
- Branching and merging maps
- Deleting maps
- Viewing workflow logs

Creating Projects

Projects store and group maps in a hierarchy, Projects > Mappings. You can create an ETL tool-specific project and specify its details, such as project description, project manager, business sponsor, cost center, and IT sponsor.

To create projects, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the **Workspace Mappings** pane, right-click the **Projects** node.



3. Click Create Project.

The Create Project page appears.

Create Project Project Details Project	Documents Project Users	Save &	_ □ X
Project Name*		Cost Center	
Description	<u>ĕ</u> <u>A</u> <u>H</u> B <i>I</i> <u>U</u>	Ĕ Ē Ē Ē Ē Ĕ ¥ ✔	A
Project Manager Name Business Sponsor Name Project ETL	SSIS Pseudocode	IT Sponsor Name Enable display of Transformation wit	thout pseudocode
,			

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
	Specifies the name of the project.
Project Name	For example, Data Lake Migration.
	For more information on naming conventions, refer to the
	Best Practices section.
	Specifies the description of the project.
Description	For example: The project contains the mapping spe-
	cifications for the sales data migration.
Project Manager Name	Specifies the project manager's name.
rioject Manager Name	For example, John Doe.
Business Sponsor Name	Specifies the business sponsor of the project.
Busiliess Spolisor Marile	For example, ABC Consulting Services.
Droject ETI	Specifies the ETL tool assigned to the project.
Project ETL	For example, Informatica Pseudocode.
Cost Center	Specifies the cost center of the project.

Field Name	Description				
	For example, Finance and Accounting.				
IT Cooncor Namo	Specifies the IT sponsor of the project.				
IT Sponsor Name	For example, XYZ IT Services.				
	Specifies whether the transformation is displayed without				
Enable display of Trans-	pseudocode.				
formation without pseudo	Switch Enable display of Transformation without pseudo				
code	code on (() to display transformation without pseudo-				
	code.				

5. Click Save and Exit.

A new project is created and added to the project tree.

Once a project is created, you can enrich it further by:

- Adding supporting project documents
- Assigning users to the project
- Configuring extended properties
- Setting up collaborations
- Creating subject areas
- Creating maps

Adding Documents

You can add supporting documents, such as text files, audio files, video files, document links, and so on to a project.

To add documents to projects, follow these steps:

- 1. In the Workspace Mappings pane, click a project.
- 2. Click the Project Documents tab.

The following page appears.

DATA INTELLIGENCE SUITE Mapping Manager									
Workspace Mappings 🛛 👻	•	Mapping Summary	Project Details	Project Document	Project L	Isers Extended	Properties Collab	ooration Center	•
Mappings	Proj	ect Documents Grid							
Projects	Ð)							
 a Carrefour (9) b a Data Lake Migration (3) 	#	Document Name	Docun	nent Type Docu	ment Link	Document Status	Document Owner	Description	
EDW (3)									
 ERP (2) Erwin_Project (4) 									
Erwin_Sales (0) Exeter (2)									

3. Click 💽.

The Add Project Document page appears.

Add Project Document				_ 🗆	×
				li ×	
Document Name*		Document Owner]	
Document Reference		Document Object	Drag-n-Drop files here or		
Reference Number			click to select files for upload.	≜	
Document Link					
Description	<u>≩ A</u> <u>H</u> B <i>I</i> <u>U</u>	≣ ≣ ≣ ≣ ⊑ ⊑ ≝ ✔			
			*		
			-		
Approval Required Flag					

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

Option	Description						
Document Name	Specifies the name of the physical document being attached to the pro- ject.						
Nume	For example, Project Details.						
Document	Specifies the name of the reference document.						
Reference	For example, Wikipedia pages.						
Reference	Specifies the reference number of the reference document.						
Number	For example, KB_230145.						
Document	Specifies the document owner's name.						
Owner	For example, John Doe.						
Document Object	Drag and drop or use 😑 to browse and select the document.						
Document	Specifies the URL of the document.						
Link	For example, https://drive.google.com/file/I/2sC2_SZIyeFKI7OOn-						
	b5YkMBq4ptA7jhg5/view						
	Specifies the description of the document.						
Description	For example: The document is to keep a record of description and data dictionary of the system.						
Approval	Specifies whether the document requires approval or not.						
Required	Select the Approval Required Flag check box to select the document						
Flag	status.						
	Specifies the status of the document.						
Document	For example, In Progress.						
Status	Select the status of the document from the drop down. This field is avail-						
	able only when the Approval Required Flag check box is selected.						

5. Click 💾.

The project document is saved in the Project Documents Grid.

Workspace Mappings 🗸	4	Mapping Summary	Project Details	Project Documents	Project Users Ex	dended Properties	Collaboration Center	,
Mappings	Pro	oject Documents Grid						
r∰ Transformations ⊿ ∰ Projects	E	Ð						
 Carrefour (9) Data Lake Migration (3) 		Document Type	Document Link	Document Status	Document Owner	Description	Options	
) 📕 EDW (3)		pdf	https://erwin.com/	InProgress	Samuel		0 ± 🗡	×
 ERP (2) Erwin_Project (4) 								
Erwin_Sales (0)								
 Exeter (2) B QVIA (1) 								

Once a supporting document is added, use the following options:

Information (10)

Use this option to view the document information.

Download (📥)

Use this option to download the document.

Edit (🖍)

Use this option to update the document details.

Delete(X)

Use this option to delete the document that is not required.

Assigning Users

You can assign one or more members of your team to a project. Team members assigned to a project have write access to all mappings under it.

To assign users to projects, follow these steps:

- 1. In the Workspace Mappings pane, click a project.
- 2. Click the Project Users tab.

The Project Users page appears.

DATA INTELLIGENCE SUITE Mapping	Manag	er					Ą			
Workspace Mappings 🔹 👻	• *	apping Summary	Project Details	Project Documents	Project Users	Extended Prop	perties Collabora	tion Cen	ter	•
 Mappings Transformations 	Projec	ct Users								
Projects ERP (2)	Ð									
Erwin_Project (4) Erwin_Sales (0)	#	User ID	U	Jser Full Name	Assigned Role	Email ID	Manager Name	View	Edit	Delete
Transformations										
🇞 Test Cases 🌉 Mappings										

3. Click 🛨.

The Assign Project Users page appears.

Assign Project Users	_ ¤ ×
User ID	Assigned Users
abc Administrator janedae jdenver jdoe ks123 mboggs mread new_user_id public	×

 Select user IDs under User ID list-box and move them to Assigned Users list-box using the arrows (➡ or ➡). Similarly, to change existing user assignment, select user IDs under Assigned Users list-box and move them back to User ID list-box using the arrows (4 or 4).

Note: You cannot assign users with Administrator role to projects.

5. Click

The selected users are assigned to the project.

Workspace Mappings	•	۹ Ma	pping Summary	Project Details Pr	oject Documents	Project Users	Extended Properties	s Collaboratio	n Center			•
 Mappings Transformations 	•	Project	Users									
Projects		÷										
 EDW (3) ERP (2) Erwin_Project (4) 		#	User ID		User Full Name		Assigned Role	Email ID	Manager Name	View	Edit	Delete
		1	janedoe		Jane Doe	1	Mapping Designer	jane.doe@edufim	K.Sridhar	0	1	×
Erwin_Sales (0) Transformations		2	public		public - Default Sy	stem User 🛛 p	public	abc@abc.com		0	/	×
Test Cases		3	sojha		Saras Ojha	1	Mapping Admin	saras.ojha@gmail.	K.Sridhar	0	/	×

Use the following options to work on the project users list:

Information (10)

Use this option to view project user details, such as telephone number, company, and the assigned responsibility.

Edit (🖍)

Use this option to update project user details, such as assigned role and assigned responsibility.

Delete (🗙)

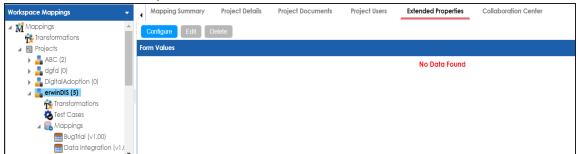
Use this option to remove a user from the project users list.

Configuring Extended Properties

You can configure user-defined project properties under the Extended Properties tab. First, you need to set up a form and then use it to configure the user-defined extended properties.

To configure extended properties of projects, follow these steps:

- 1. In the **Workspace Mappings** pane, click a project.
- 2. Click the Extended Properties tab.



3. Click Configure.

Extended Pro	perties Configu	ration									
Edit Delete											
Field Controls											
Group	Text Box	Combo Box	List	O Radio	Check Box	T Number	Boolean	Date Picker	Category	Rich Editor	
Configure Form											

The Extended Properties Configuration page contains the following sections:

- Field Controls: Use this pane to get the required UI elements.
- Configure Form: Use this pane to design forms using the available UI elements in the Field Controls pane.
- Properties: Use this pane to view the properties of the UI element selected in the Configure Form pane.

- 4. Click **Edit**. Then, double-click or drag and drop the required UI elements from the **Field Controls** pane to the **Configure Form** pane.
- 5. Select UI elements, one at a time, and configure their properties in the **Properties** pane.

Extended Properties Configuration				- □ >
Save Cancel Delete				
Field Controls				
	List O Radio	Check Box Number	Boolean Date Picker	Category Rich Editor
Configure Form			Properties	
	<u>а</u> <u>н</u> в	IU≣≣≣	Property	Value
Rich Editor			Published	ON O
Rich Editor			Field	Rich Editor
		-	Туре	Rich Editor
			Dependencies	Type or click here
			Configure Values	Configure
			Mandatory	OFF
			Regular Expression	
			Description	
			Visible in Extended Properties	ON
			Order	1
			Note [*] : 1. Double click on the field 2. Select the field name to u	

Note: The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description					
Published	Switch Published to ON to publish the field.					
Field	pecifies the field label.					
	o change the field labels, double-click the corresponding Value ell.					
	For example, Project Approved On.					
	Specifies the type of the field.					
Туре	To select field types, double-click the corresponding Value cell.					
	For example, Date Picker.					
Configure Values	Specifies the connectors for the field.					
Configure Values	To enter option values, click Configure Values .					

Property	Description				
	Use the following options:				
	 Default connector: Use this option to enter option values manually. 				
	Reference Data Manager : Use this option to pull option val-				
	ues from reference tables in the Reference Data Manager.				
Mandatory	Specifies whether the field is mandatory.				
	Specifies the field description.				
Description	To enter field descriptions, double-click the corresponding Value				
	cell.				
Visible in Exten-	Switch Visible in Extended Properties to ON to make it visible on				
ded Properties	the Extended Properties tab.				
	Specifies the order of the field on the Extended Properties tab.				
	To enter the order number, double-click the corresponding Value				
Order	cell.				
	You can also drag and move fields in the Configure Form pane to change their order.				

6. Click Save.

The form is saved, and is available on the Extended Properties tab.

Setting Up Collaborations

You can start discussions on mapping projects or a relevant topic with your team using the Collaboration Center. This enables you and your team to work together.

To set up collaborations, follow these steps:

1. In the Workspace Mappings pane, click a project.

The Mapping Summary page appears.

Workspace Mappings 🛛 👻	4 ۸	apping Summary	Project Details	Project Documents P	roject Users	Extended Prope	collaboration Cent	er			
Mappings	Мар	oing Search									
Mappings Transformations Transformations ABC (2) ABC (2) Digital Adoption (0) Digital Adoption (0) Grant Cases Mappings	Map	oing Details							ወ 🗸		
 ABC (2) adgfd (0) 	#	Project Name	Subject Hierarchy	Map Name	Lock Status	Locked By	Locked Date	Mapping State	Mapping Description		
a erwinDIS (5)											
💑 Test Cases	1	erwinDIS		BugTrial	a			In Progress	Testing for a bu logged by QA		
	2	erwinDIS		Data Integration	6	Administrator	05/25/2020 12:05:21	In Progress			
BugTrial (v1.00)	3	erwinDIS		erwinSalesIntegration	a			In Progress			
erwinSalesIntegration	4	erwinDIS		SalesforceIntegration	a			In Progress			
SalesforceIntegration	5	erwinDIS		TechPubsBUgTrial	a			In Progress	TechPubsBUgTri		

2. Click the **Collaboration Center** tab.

•	Mapping Summary	Project Deto	ails Project Do	cuments Project (Users Extended Prope	collaboration Center	_	•	•
Se	arch	•					Search		

3. Click ⁺.

The Add Topic page appears.

Add Topic	_ 🗆 ×
	→ 븝
Topic Name*:]
Description :	
	-

- 4. Enter the **Topic Name** and **Description**.
- 5. Click 💾.

The topic is saved and added to the list of topics on the Collaboration Center tab.

You can manage a topic using the options available under Topic Options (). <u>Managing a</u> topic involves:

- Viewing, editing, or deleting a topic
- Assigning users
- Managing notifications
- Saving topic conversations
- Sharing a topic

Managing Topics

Managing topics involves:

- Viewing, editing, or deleting a topic
- Assigning users
- Managing notifications
- Saving topic conversations
- Sharing a topic

To manage topics, follow these steps:

- 1. Click the Collaboration Center tab.
- 2. In the list of topics, on the topic you want to manage, click

Topic options appear.

		Ę	View Topic Details			ţ	Search
Mapping Summary	Project	Ø	Edit Topic Details	Project Users	Extended Properties	Collaboratio	on Center
Search	+		Assign Users				
Addition of	Aessages: 0	((ب	Disable Notification				
Users: 1 Messages: 0		ľ	Save Conversation as Text	/ Columns in			
Unread: 0		\Join	Send Topic as Email	s: 0, Unread: 0			
		8	Delete Topic				
		Γ					

3. Use the following options:

View Topic Details

Use this option to view topic details, such as creator, the creation date and time, and the modification date and time.

🗖 View Topic	- 0
Topic Name *:	Addition of new Columns in the Target
Description :	New Columns are required in the Target System.
Created By:	Administrator
Created DateTime:	01/02/2020 12:20:44
Modified By:	Administrator
Modified DateTime:	01/02/2020 12:20:44

Edit Topic Details

Use this option to edit the topic name and description to enrich it further.

Assign Users

Use this option to assign multiple users to collaborate with you and contribute to the topic.

To assign users, click Assign Users.

The User Assignment page appears.

User	Assignment		_ 🗆 ×
	public	8	^
	abc	8	- 11
	Administrator	8	- 11
	janedoe	8	
	jdenver	8	- 11
	jdoe	8	
	M.Samuel	8	
	mbogg	\sim	•

Select users and click

The assigned users can chat and collaborate with each other.

Mapping Summary	Project Details	Project Documents	Project Users	Extended Properties	Collaboration Center		•
Search	•					Search	
Addition o Users: 2 Messages: 2 Unread: 0			ew Columns i Iges: 2, Unread:				
						Today 12:42 PM	abc
		Hi Admin!					
		Today 12:42 PM	Administrato	r			
		Hi abc!					
	Туре у	our Message					SEND

Disable Notification

Use this option to choose whether you are notified whenever the topic is updated.

Save Conversation as Text

Use this option to save topic conversations to a text file. This option downloads a text file with the conversation, authors, and time stamp.

Send Topic as Email

Use this option to send the topic and its conversations in an email. Clicking **Send Topic as Email** opens an email recipient list, where you can select one or multiple recipients. Click to send an email to the selected recipients.

Delete Topic

Use this option to delete a topic that is no longer required.

Creating Subject Areas

Subject areas provide one more level of grouping for mapping specifications. You can create a subject area within a project or within another subject area. Ensure that the subject area names are unique under each project.

Subject Areas

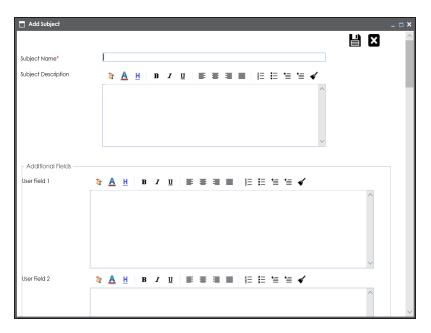
To create subject areas, follow these steps:

1. In the **Workspace Mappings** pane, right-click a project.



2. Click New Subject Area.

The Add Subject page appears.



3. Enter the Subject Name and Subject Description.

For example:

- Subject Name: Members.
- Subject Description: This subject area is created to arrange the mappings logically.

You can use additional fields and define UI labels in Language Settings.

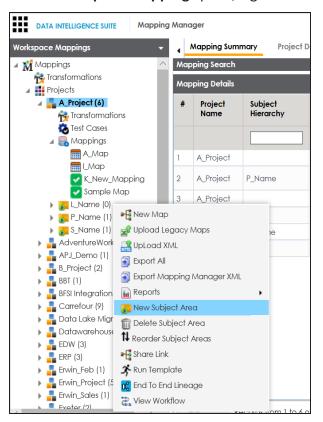
4. Click

The subject area is saved and added to the project.

Nested Subject Areas

You can create subject areas within another subject area. These subject areas are called nested subject areas.

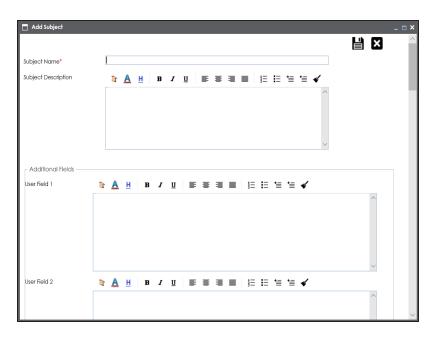
To create nested subject areas, follow these steps:



1. In the **Workspace Mappings** pane, right-click a subject area.

2. Click New Subject Area.

The Add Subject page appears.



3. Enter the Subject Name and Subject Description.

You can use additional fields and define UI labels in Language Settings.

4. Click

A subject area is created under the subject area.

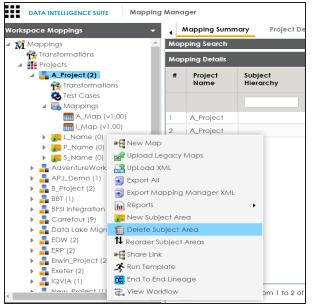
Managing Subject Areas

Managing subject areas involves:

- Deleting
- Reordering

To manage subject areas, follow these steps:

1. In the Workspace Mappings pane, right-click a subject area.



2. Use the following options:

Delete Subject Area

Use this option to delete subject areas that are not required.

Reorder Subject Areas

Use this option to reorder subject areas. To reorder subject areas, click **Reorder Subject Areas**.

The Subject for <Project_Name> page appears.

📘 Subje	Subjects for: A_Project (2)										
0 C	🕐 Order By 🛛 Ascending Order 🔹 Sort Subject By 🛛 Subject Name 📼										
#	Subject Name	Current Order	New Order	Parent Hierarchy	Created By	Created Date	Modified By	Modified Date			
1	L_Name(0)	1	1	A_Project	Administrator	2019-10-30 11:45:11.917	Administrator	2019-10-30 11:45:11.917			
2	P_Name(0)	2	2	A_Project	Administrator	2019-10-30 11:44:51.983	Administrator	2019-10-30 11:44:51.983			
3	S_Name(0)	3	3	A_Project	Administrator	2019-10-30 11:35:42.867	Administrator	2019-10-30 11:35:42.867			

To order subject areas, from the **Order By** list, select one of the following options:

- Ascending Order: Select this option to order in ascending alphabetical order.
- Descending Order: Select this option to order in descending alphabetical order.
- **Custom Order**: Select this option to order in custom order.

To sort subject areas, from the **Sort Subjects By** list, select one of the following options:

- **Subject Name**: Select this option to sort by subject name.
- Created By: Select this option to sort by the users who created subject areas.
- Created Date: Select this option to sort by created date.
- Modified By: Select this option to sort by the users who modified subject areas.
- Modified Date: Select this to sort by the modified date.

Defining Transformations

Transformations specify rules that derive values from source columns to get the required values in target columns. You can define enterprise-level and project-level transformations. These transformations can be used as business rules and extended business rule transformations in mapping specifications. Ensure that you define transformations for the same ETL option as that of your mapping project.

To define transformations, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, click any one of the following:
 - Transformations node: Click this option to define enterprise-level transformations.
 - Transformations node under a project: Click this option to define project-level transformations.

For example, if you click the Transformations node, then the Transformation Details page appears.

Workspace Mappings 🛛 👻		Transformation Details			🏟 🕂 🔶 👚 ौ	
Mappings						
Transformations Projects Project (0)		Transformation Name	SSIS Pseudocode	Informatica Pseudocode	Intended Use	
 AdventureWorks_Migration (8) APJ_Demo (1) 						
BBT (1)	1	1-DataGov(HighDate:12/31/9999)		To_date(mm/dd/yyyy,12/31/9999)	DataGovernance ru	
 Carrefour (9) Data Lake Migration (3) 	2	2-DataGov(LowDate01/01/0001)		To_date(mm/dd/yyyy, 01/01/0001)	DataGovernance ru	
 B EDW (2) ERP (2) 	3	3-DataGov(AverageChurn)		Count(active customers)/(Count of Cancelled Customers for current month)	DataGovernance ru Churn KPIs are used.	

3. Click 🖸.

The Transformation Rule Editor page appears.

🍟 Transformation Rule Editor		_ 🗆 ×
		li ×
Published	OFF	
Transformation Name*		
Scope	All Projects	•
ETL Option	SSIS Pseudocode	•
	Replace Transformation Name with Pseudocode	
Pseudocode	1	
	Note: Press 'Ctrl + Space' to select Transformations	
Intended Use		

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

Field Name	Description
Published	Switch Published on (.) to publish the transformation.
Transformation Name	Specifies a unique name of the transformation.
Industriation Name	For example, ASCII.
	Specifies the projects to which the transformation can be
Scope	applied.
	For example, All Projects.
	Specifies the ETL option.
ETL Option	For example, Informatica Pseudocode.
	You can <u>configure ETL option list</u> and add or remove an ETL
	option from the list.

Field Name	Description
Replace Trans- formation Name with Pseudocode	Switch Replace Transformation Name with Pseudocode on () to replace the transformation name with pseudocode.
Pseudocode	Specifies the pseudocode for the transformation. Enter a pseudocode or use Ctrl + Space keys to select a pseudocode. For example, To_date(mm/dd/yyyy,1231,9999).
Intended Use	Specifies the objective of the transformation. For example: Data governance rule - use on projects.

5. Click 💾.

A new transformation is added on the Transformations Details page.

You can upload transformations in bulk using an MS Excel file.

Once a transformation is defined, you can manage it using the options available on rightclicking the transformation. <u>Managing Transformations</u> involves:

- Editing transformations
- Running impact analysis
- Viewing history

Configuring Transformation Library

You can create transformations for the following ETL options:

- DataStage Pseudocode
- BODS Pseudocode
- SSIS Pseudocode
- Informatica Pseudocode
- ODI Pseudocode
- Talend Pseudocode

This ETL options list forms the Transformation Library and is configurable. You can add or remove an ETL option from the ETL options list.

To configure transformation library, follow these steps:

1. In the Workspace Mappings pane, click the Transformations node.

The Transformation Details page appears.

Tra	fransformation Defails 🔅 🕁 🖶 📥 🗎							
#	Transformation Name	BODS Pseudocode	SSIS Pseudocode	Informatica Pseudocode	ODI Pseudocode	Talend Pseudocode		
1	1-DataGov(HighDate:12/31/9999)			To_date(mm/dd/yyyy,12/31/9999)		*		
2	2-DataGov(LowDate01/01/0001)			To_date(mm/dd/yyyy, 01/01/0001)				
3	3-DataGov(AverageChurn)			Count(active customers)/(Count of Cancelled Customers for current month)				

2. Click ᅇ.

The ETL Settings page appears.

📸 ETL Setti	ngs _ 🗆 🗙
	Save Cancel
Select E	ETL to add to Transformation Library
OFF	DataStage Pseudocode
OFF	BODS Pseudocode
	Talend Pseudocode
	ODI Pseudocode
	SSIS Pseudocode
	Informatica Pseudocode
	ecting an ETL tool will add the ability to define psuedocode specific to the ETL tool in al transformation library

3. Switch an **<ETL_Option>** key to **ON** to add the corresponding ETL option to the Transformation Library.

For example, switch **BODS Pseudocode** to **ON** to add BODS Pseudocode to the Transformation Library.

4. Click Save.

ETL options are added to the ETL Option list.

📸 Transformation Rule Editor		_ 🗆 ×
		ШХ
Published	OFF	
Transformation Name*		
Scope	All Projects	-
ETL Option	BODS Pseudocode	-
	BODS Pseudocode	
Pseudocode	SSIS Pseudocode	
Pseudocode	Informatica Pseudocode	
	ODI Pseudocode	
	Talend Pseudocode	
	Note: Press 'Ctrl + Space' to select Transformations	
Intended Use		

Uploading Transformations

You can upload transformations in bulk using an MS Excel file. You can either use an existing MS Excel file or a template to upload transformations. Ensure that the MS Excel file follows the correct template.

To upload transformations, follow these steps:

1. In the **Workspace Mappings** pane, click the **Transformations** node.

The Transformation Details page appears.

Trai	ansformation Details						
#	# Transformation Name Informatica Pseudocode Intended Use						
1	1-DataGov(HighDate:12/31/9999)	To_date(mm/dd/yyyy,12/31/9999)	DataGovernance rule - use on all projects	All Projects			
2	2-DataGov(LowDate01/01/0001)	To_date(mm/dd/yyyy, 01/01/0001)	DataGovernance rule - use on all projects	All Projects			

2. Click 合.

The Upload Transformations page appears.

Upload Transformations	_ 🗆 🗙
Drag-n-Drop files here or click to select files for upload.	

3. Drag and drop or use 📤 to browse and select the MS Excel file.

You can use a template to upload transformations. For more information on downloading templates, refer to the Downloading Templates section.

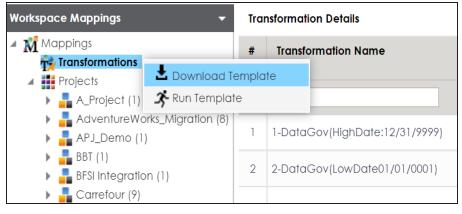
4. Click 1

The file is uploaded, and transformations are added to the Transformation Details page.

Downloading Templates

To download templates, follow these steps:

1. In the **Workspace Mappings** pane, right-click the **Transformations** node.



2. Click Download Template.

The template is downloaded in the XLSX format. You can update the MS Excel file with the required transformations.

Managing Transformations

Managing transformations involves:

- Editing transformations
- Deleting transformations
- Running impact analysis
- Viewing history

To manage transformations, follow these steps:

1. In the **Workspace Mappings** pane, click the **Transformations** node.

The Transformation Details page appears.

Tra	Transformation Details 🗘 💽 🐺 🕇							
*	Transformation Name	BODS Pseudocode	SSIS Pseudocode	Informatica Pseudocode	ODI Pseudocode	Talend Pseudocode		
1	1-DataGov(HighDate:12/31/9999)			To_date(mm/dd/yyyy,12/31/9999)		A.		
2	2-DataGov(LowDate01/01/0001)			To_date(mm/dd/yyyy, 01/01/0001)				
3	3-DataGov(AverageChurn)			Count(active customers)/(Count of Cancelled Customers for current month)				

2. Select the required row and right-click it.

The available options appear.

Tra	Transformation Details							
#	Transformation Na	me	BODS Pseudocode		SSIS Pseudocode			
51								
32	FIRST							
33	FLOOR	Edit Transfor	rmation Details					
34	FV	impact And	alysis Report					
35	GET_DATE_PART							

3. Use the following options:

Edit Transformation Details

Use this option to edit transformation details, such as transformation name and its scope.

Delete

Use this option to delete the selected transformation.

Note: If a transformation is already used in a Mapping Specification, it is still visible under it. However, it is not available for future use.

Impact Analysis Report

Hover over **Impact Analysis Report** and use the following options to view impact analysis of transformations:

Default Search: Use this option to view the impact analysis report of the selected transformation.

Advanced Search: Use this option to select multiple transformations and view their impact analysis report.

For example, the following image displays the impact analysis of a transformation.

I & .	Advanced Search				_ 🗆 🗙
В	usiness Rule:	LOWER]		×
Imp	act Analysis Repor	1			
#	Project Name	Mapping Name	Map Specificati Version	ion Business Rule	
1	<u>TestData Map</u>	<u>HeteroMultiSrc Lookup BR</u>	<u>Не</u> 1.0	LOWER(#1)	
2	<u>TestData Map</u>	HeteroMultiSrc Lookup BR	<u>Hc</u> 1.0	LOWER(#1)	
3	<u>TestData Map</u>	HomoMultiSrc Lookup BR	<u>Hei</u> 1.0	LOWER(#1)	
4	<u>TestData Map</u>	HomoMultiSrc Lookup BR	<u>Hor</u> 1.0	LOWER(#1)	
5	<u>TestData Map</u>	MultiSource Lookup BusRu	<u>e S</u> 1.0	LOWER(#1)	
6	<u>TestData Map</u>	SingleSource Lookup BusR	<u>le</u> 1.0	LOWER(#1)	

History

Use this option to view activity logs of a transformation.

For example, the following image displays the history of a transformation.

••• His #	Transformation Name	Pseudocode	Intended Use	Created By	Created	Last	Last
					Date Time	Modified By	Modified Date Time
1	FLOOR		ETL Buill-In Transformation: Record handling and processing rule for all projects. Returns the largest integer less than or equal to the numeric value you pass to this function. For example, R. Whe function returns 3. If you pass 3.98 to FLOOR, the function returns 3. Ukewske, if you pass -3.17 to FLOOR, the function returns -4.	Administrator	2018-09-14 10:39:48.937	Administrator	2020-01-13 16:23:56.38
<							>

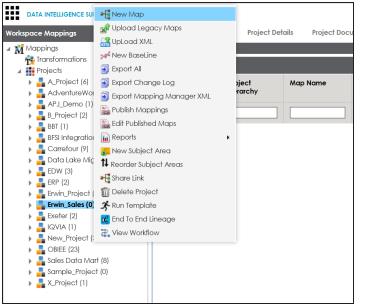
Creating Maps

You can create maps under a project or subject area. You can perform source to target mappings and create mapping specifications in maps. These mapping specifications facilitate your data integration project.

To create maps, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the **Workspace Mappings** pane, right-click a project or subject area.

For example, when you right-click a project the available options appear.



3. Click New Map.

The New Mapping Wizard page appears.

New Mapping Wizard	_ 8 X
1. Create a New Mapping	
Mapping Name*	□.00 □.00 □.0FF □.0FF
Job Name XRef	
Mapping Description	
	Proceed with Auto Map Finish Cancel

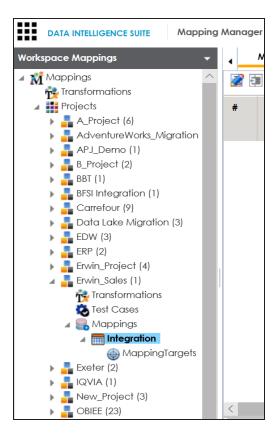
4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
	Specifies the mapping specification name.
Mapping	For example, EDW_PROD_IDS_Benefits_Detail.
Name	For more information on naming conventions, refer to the Best
	Practices section.
	Specifies the version of the mapping specification.
Manning Vor	This field is autopopulated.
Mapping Ver- sion	For example, 1.00.
	For more information on configuring version display of maps, refer to
	the <u>Configuring Version Display</u> topic.
Sync Source	Specifies whether source metadata syncs with the mapping.
Metadata	Switch Sync Source Metadata to ON to sync source metadata with the
	mapping.
Sync Target	Specifies whether target metadata syncs with the mapping.
Metadata	Switch Sync Target Metadata to ON to sync target metadata with the

Field Name	Description
	mapping.
Manning	Specifies the description of the mapping.
Mapping Description	For example: This is a map between EDW source and IDS target sys-
Description	tems.
	Specifies the mail comments, which can be sent to the project users
	through an email notification.
Mail Com-	For example: Source and target have identical columns, hence they
ments	can be mapped using auto-map technique.
	For more information on configuring notifications, refer to the Con-
	figuring Notifications topic.

5. Click Finish or Proceed with Auto Map.

When you click Finish, a map is created and saved in the mappings tree. You can create a mapping specification under the map using <u>drag and drop method</u> or <u>graphical</u> <u>design</u>.



When you click Proceed with Auto Map, you can <u>create mapping specification using</u> auto-map technique.

Create New Mapping Wize	ard								_ @ X
	2	. Auto Map Sou	rce & Targ	et Objects					
Mapping Groups	Add Group	Delete Group							Metadata
View All			Target Obje	ect(s)				Source Object(
Group 1	4	4			* *	S	Ţ	4	 ▲ System ▲ A System ▲ A System ▲ A System ▲ AdventureWorks ▲ AdventureWorks<!--</th-->
	Auto Mapping	Proviow Grid						8 🗞 💉 🛱	a 🗐 BI
	# Target System	Target Environmen	Target Object	Target Attribute	Source Attribute	Source Object	Source Environmen	53 🚴 🛹 🔂	 ▶ ■ Microstrategy ▲ ■ BO Reports ▶ ■ BO Reports ▶ ■ Customer Excellence Report
									 Customer Order Entry
	Total Rows: 0	Target Tables: 0	Source Table	s: 0 Targets	Not Mapped: 0	Sources No	t Mapped: 0		→ Table DM_DW ▼
Create a distinct Map	ping for every G	roup							Back Finish Cancel

Drag and Drop

You can map source metadata with target metadata and create mapping specifications using the drag and drop method. This method is useful even when source column names are different from target column names. After mapping source to target, you can set the target update strategy and enter a description about the strategy.

Creating Mapping Specifications

To create mapping specifications using drag and drop method, follow these steps:

1. In the **Workspace Mappings** pane, click a map.

By default, the Mapping Specification tab opens.

•	Mapping Specific	ation Grap	hical Designer	Test Specification	Workfle	ow Log			•
	i 🔯 🔳 🍣 [Ir	ntegration]			Profiles:	Profile_	ABC	💌 🏟 🗟 😫	3 < D
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Colu Data Type		ſarget Column Length	Target Column Precision	Target Colur Scale

2. Click 🜌.

You can now edit the Mapping Specification grid.

3. Drag source table or column from the **Metadata Catalogue** pane and drop in the **Mapping Specification** grid.

Ensure that you drop source tables or columns under the respective columns.

Note: You cannot drop source systems or environments in the Mapping Specification grid.

•	Mapping Specifica	tion Grap	hical Designer	Test Specification	Workflow Lo	g			୍
<u>í</u>	APPEND 077	👌 👔 [Integratio	n]	Profiles: Defau	t 🔽	\$ 💫 🏟 🕸	3 6 6 8 < 2	Metadata	
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule		
			dbo.RM_RESC	DURCE				 ✓ ■ Integration (v1.00) ▶ ■ dbo.RM_RESOURCE 	
								Fintegration_Target (v1.00) Fintegration_Target (v1.00) Fintegration_Target N_Environment (v1.00) Fintegration_Target	
								emilian inclusion in the intervention of the interventintervention of the intervention of the intervention of the interve	

 Drag target table or column from the Metadata Catalogue pane and drop in the Mapping Specification grid.

Ensure that you drop target tables or columns under the respective columns.

Note: You cannot drop target systems or environments in the Mapping Specification grid.

5. Click 😡

The mapping specification is saved.

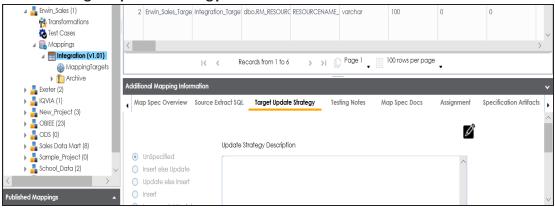
Setting Target Update Strategy

To set the target update strategy, follow these steps:

1. Expand the Additional Mapping Information pane.

This pane is available at bottom of the central pane when you click a map in the Workspace Mappings pane.

2. Click the Target Update Strategy tab.



- 3. Click 🖉.
- 4. Click the required strategy, enter **Update Strategy Description**, and click

The target update strategy is set.

You can enrich a mapping specification by:

- Adding transformation and lookup details
- Associating code cross walks (code mappings)
- Associating reference tables
- Linking requirements

After creating a mapping specification, you can analyze a mapping specification. <u>Analyzing</u> mapping specifications involves:

- Generating virtual preview of target
- Previewing data
- Performing table gap analysis
- Performing column gap analysis
- Running impact analysis
- Running lineage analysis
- Running end to end lineage
- Opening business view
- Viewing mapping statistics

Graphical

You can use the Graphical Designer tab to map source metadata with target metadata and create mapping specifications. This method is useful even when source column names are different from target column names.

After mapping source to target, you can set the target update strategy and enter a description about the strategy.

Creating Mapping Specifications

To create mapping specifications graphically, follow these steps:

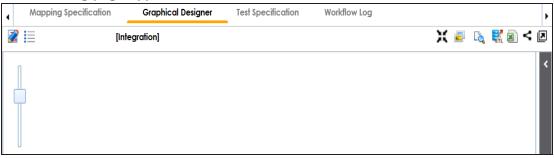
1. In the Workspace Mappings pane, click a map.

By default, the Mapping Specification tab opens.

· —	Mapping Specifico	ation Grap	nical Designer	Test Specification	Workflow	Log		Þ
	🗏 🔯 🔳 🍣 (In	tegration]			Profiles: Pro	ofile_ABC	💌 🏟 🗟	< 🖂 🗲 🖾
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Colur Scale

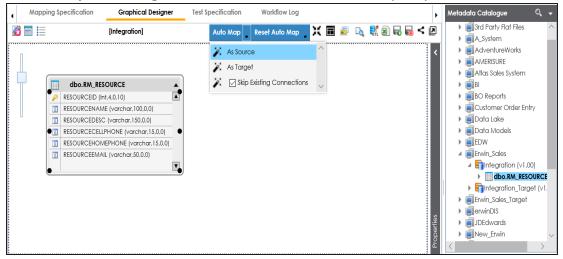
2. Click the Graphical Designer tab.

The following page appears.



3. Click 🜌.

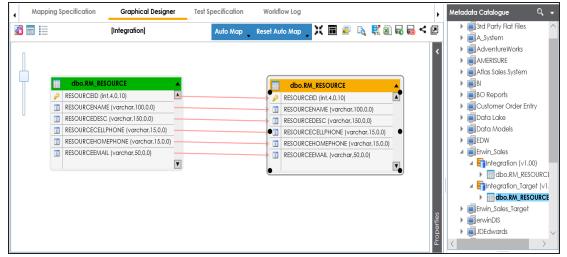
- 4. Drag source table from the **Metadata Catalogue** pane and drop on the **Graphical Designer** tab.
- 5. On the Graphical Designer tab, click the source table and specify it As Source.



- 6. Drag target table from the **Metadata Catalogue** pane and drop on the **Graphical Designer** tab.
- 7. On the Graphical Designer tab, click the target table and specify it As Target.

4	Map	ping S	pecification	Graphical Designe	er	Test Specific	ation	Workflo	w Log					•	Me	etadata Catalogue	Q,	
1	3 🗖 🗄			[Integration]		Auto	Map	Reset Auto	Map	ΧĒ	a b	. 🔣 🗟	n 💀 •	< 🗷		Image: State of the state of		^
		-										• -en -=				A_System		
	0					ž.	As Sourc	ce		^				<		AdventureWorks		
						***	As Targe	ot.								AMERISURE		
	Щ.	_			_											🕨 🗐 Atlas Sales System		
			dbo.RM_RES	OURCE		<i>P</i> ×	🖂 Skip	Existing Cor	nections	\sim						BI		
		P	RESOURCEID (int	t,4,0,10)				_								BO Reports		
			RESOURCENAM	E (varchar,100,0,0)	-				dbo.R	M_RESOUR	CE					🕨 🗐 Customer Order Er	ntry	
	U		RESOURCEDESC	(varchar,150,0,0)	-			1	RESOURC	EID (int,4,0	,10)					🕨 🗐 Data Lake		
			RESOURCECELLF	HONE (varchar, 15, 0, 0)	-				RESOURC	ENAME (vo	archar,100),0,0)				🕨 🗐 Data Models		
			RESOURCEHOM	EPHONE (varchar, 15, 0, 0)	-				RESOURC	EDESC (va	rchar,150	.0,0)				EDW		
			RESOURCEEMAIL	L (varchar,50,0,0)	-				RESOURC	ECELLPHO	NE (varch	ar,15,0,0)				▲		
					▼				RESOURC	EHOMEPH	ONE (vara	har, 15, 0, 0)				🔺 📑 Integration (v1	.00)	
		_							RESOURC	EEMAIL (vo	archar,50,	0,0)				🕨 🔝 dbo.RM_RE	SOURCI	
													V			🔺 🛐 Integration_Tar	get (v1.	
								_					_		1	dbo.RM_RE	SOURCE	
																Erwin_Sales_Target	t	
														ties		erwinDIS		
														Properties		JDEdwards		\sim
														Pro	<		\rightarrow	

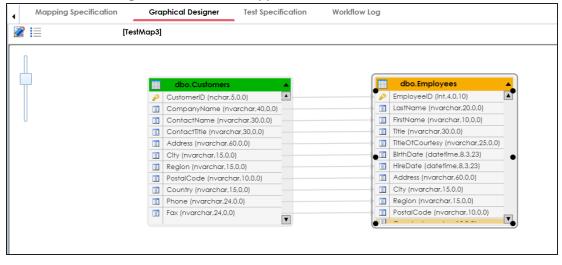
- 8. Use the following options to map source with target:
 - If the source and target have same column names, click Auto Map.



The source and target columns are mapped.

If the source and target have different column names, then drag your mouse from a source column to the required target column.

The source and target columns are mapped.



9. Click 😡

The mapping specification is saved.

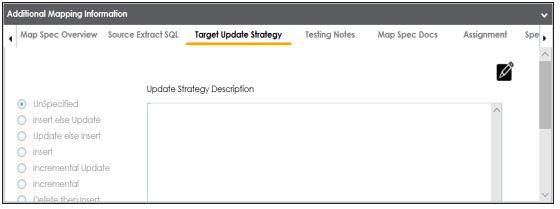
Setting Target Update Strategy

To set the target update strategy, follow these steps:

1. Expand the Additional Mapping Information pane.

This pane is available at bottom of the central pane when you click a map in the Workspace Mappings pane.

2. Click the Target Update Strategy tab.



- 3. Click 🖉.
- 4. Click the required strategy, enter **Update Strategy Description**, and click

The target update strategy is set for the mapping specification.

You can enrich a mapping specification by:

- Adding transformation and lookup details
- Associating code cross walks (code mappings)
- Associating reference tables
- Linking requirements

After creating a mapping specification, you can analyze a mapping specification. <u>Analyzing</u> mapping specifications involves:

- Generating virtual preview of target
- Previewing data

- Performing table gap analysis
- Performing column gap analysis
- Running impact analysis
- Running lineage analysis
- Running end to end lineage
- Opening business view
- Viewing mapping statistics

Auto-Map

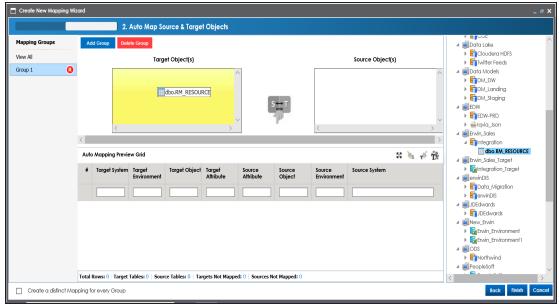
You can create a map and proceed with auto-map to create a mapping specification when source column names and target column names are same. For more information about creating maps, refer to the <u>Creating Maps</u> topic.

After creating a mapping specification, you can set the target update strategy and enter a description about the strategy.

Creating Mapping Specifications

To create mapping specifications using auto-map, follow these steps:

1. On the **Creating New Mapping Wizard** page, drag the target table from the **Metadata** pane and drop it in the **Target Object(s)** box.



2. Drag source table from the Metadata pane and drop it in the Source Object(s) box.

Create New Mapping W	fizard		_ @ :
	2. Auto Map Source & Target Objects		
Mapping Groups	Add Group Delete Group Target Object(s)	Source Object(s)	Data Lake Cloudera HDFS
RM_RESOURCE	• • • • •	dbo.RM_RESOURCE	Twitter Feeds Data Models BDM_DW BDM_Landing B_DM_Staging BDM_Staging
	Auto Mapping Preview Grid	× > × > × > × > × > × > × + * * * * * * * * * * * * * * * * * *	FieDW-PRD Add and a set of the set
	Target System Target Target Object Target Attribute Source Obje	ce Source Source System	
	Total Rows: 0 Target Tables: 0 Source Tables: 0 Targets Not Mapped: 0 Sources Not Mapp	ped: 0	
Create a distinct Ma	apping for every Group		Back Finish Cance

3. Click 👎.

The source columns are mapped with the target columns under a mapping group with the target table name. The mappings can be previewed in the Auto Mapping Preview Grid, which gives information about the target and source tables.

		2	2. Auto Map S	ource & Targ	et Objects						
apping Groups	A	dd Group Dr	elete Group								Data Lake
iew All			Tar	get Object(s)					Source Object(s)		Ficloudera HDFS FigTwitter Feeds
M_RESOURCE	B	dbo	.RM_RESOURCE			^		dbo.RM_R	FSOURCE	^	🔺 🗐 Data Models
		400									 EDM_DW EDM Landing
										DM_Landing EDM_Staging	
	<						S T				⊿ i EDW
							4			~	EDW-PRD
								<		\rightarrow	🕨 📥 lqvia_Json
										>	∡ ■Erwin_Sales
										,	Integration dbo.RM RESOURCE
	Au	o Mapping Prev	view Grid						53	🌭 🎻 🙀 📗	Erwin_Sales_Target
	#	Target	Target	Target Object	Taraet	Source	Source	Source	Source System		Baintegration_Target
		System	Environment		Attribute	Attribute	Object				4 🗐 erwinDIS
											EgiData_Migration
											EgerwinDIS
	1	Erwin_Sales	Integration	dbo.RM_RESOU	RESOURCEHON	RESOURCEHON	dbo.RM_RESOU	Integration	Erwin_Sales	^	 JDEdwards IDEdwards
	2	Erwin_Sales	Integration	dbo.RM_RESOU	RESOURCEDES	RESOURCEDESC	dbo.RM_RESO	Integration	Erwin_Sales		 New_Erwin
	3	Erwin_Sales	Integration	dbo.RM_RESOU	RESOURCECELL	RESOURCECELL	dbo.RM_RESOU	Integration	Erwin_Sales		Erwin_Environment
	4	Erwin_Sales	Integration	dbo.RM_RESOU	RESOURCENAN	RESOURCENAN	dbo.RM_RESOL	Integration	Erwin_Sales		Erwin_Environment1
	5	Erwin_Sales	Integration	dbo RM RESOL	RESOURCEEMA	RESOURCEEMA	dbo RM_RESOL	Integration	Erwin Sales		 Image: Construction of the second seco
								-	-	~	✓ ■ PeopleSoft
	6	Frwin Sales		dbo.RM_RESOL				Integration	Enwin Sales		

Use the following options to manage the auto-map:

Maximize (😫)

Use this option to maximize or minimize the Auto Mapping Preview Grid.

Delete Orphan Sources (🍡)

Use this option to delete source attributes that are not mapped.

Delete Orphan Targets (👘)

Use this option to delete target attributes that are not mapped.

Add Transformations (11)

Use this option to <u>add transformations</u> for the auto map. You can add business rule, extended business rule transformation, look up reference column, lookup on, and trans look up condition.

Add Group

Use this option to add a mapping group to perform other mappings.

Rename Mapping Group (

Use this option to rename a mapping group.

Delete Group

Use this option to delete a mapping group. To delete a mapping group, click the mapping group and then click **Delete Group**.

Create a distinct Mapping for every Group

Use this option to create distinct mapping for every group.

4. Click Finish.

A new map is created and saved under the Mappings tree. All the auto-maps in the multiple mapping groups appear in the same sequence in the Mapping Specification grid.

Workspace Mappings 🗸 👻		Mapping Specifica	tion Graph	ical Designer	Test Specificati	ion W	orkflow Log		,
Mappings	1	APPEND ON	[Integration]	1	Profiles: D	efault	- Q	lo, 👯 🗟 🗖	nd 😣 < 🗵
Indisionmations Image: Projects A_Project (6) A_Project (6) A_rotect (6)	#	Source System Name	Source Environment Name	Source Table Name	Source Colum	n Name	Source Column Data Type	Source Column Length	Business Rule
 APJ_Demo (1) B_Project (2) BBT (1) 	1	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAN	IE_New	varchar	100	TRUNC
BFSI Integration (1) Carrefour (9) Data Lake Migration (3) EDW (3)	2	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEID_N	θW	int	4	TRUNC
 ERP (2) Erwin_Project (4) Erwin_Sales (1) 	3	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEEMA	IL_New	varchar	50	TRUNC
 Iransformations ist Cases ✓ Same Mappings ✓ Integration 	4	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCECELL	PHONE_Ne\	varchar	15	TRUNC
A term and appingTargets AppingTargets AppingTargets AppingTargets AppingTargets AppingTargets AppingTargets AppingTargets	5	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEDESC	C_New	varchar	150	TRUNC
 New_Project (3) OBIEE (23) 	<	- • • • •							

Setting Target Update Strategy

To specify target update strategy, follow these steps:

1. Expand the Additional Mapping Information pane.

This pane is available at bottom of the central pane when you click a map in the Workspace Mappings pane.

2. Click the Target Update Strategy tab.

🔺 🔓 Erwin_Sales (1)	2	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	100	0	0	
💏 Transformations										
🍋 Test Cases										\sim
🔺 🔜 Mappings	<								>	
Integration (v1.01)			1.0 .0 P	ecords from 1 to 6	<i>.</i>	Page 1 🖃	100 rows per page			
MappingTargets			< < R	ecolds norm no o	> > _	· • •	100 rows per page	•		
Archive	Addition	onal Mapping Inforr	walion			_				
	Additio	onal Mapping Inforr	nation							*
	4 Ma	p Spec Overview	Source Extract SQ	L Target Update	e Strategy Tes	ting Notes M	ap Spec Docs	Assignment	Specification Artifacts	
New_Project (3)	1									~
OBIEE (23)										
DS (0)								6		
🕨 🚦 Sales Data Mart (8)			Update	Strategy Description	on					
🕨 🚦 Sample_Project (0)	۲	UnSpecified						~		
🕨 🚦 School_Data (2) 🛛 🗸 🗸	0	Insert else Update								
<	0	Update else Insert								
Published Mappings	0	Insert								\sim

3. Click 🖉.

4. Click the required strategy, enter **Update Strategy Description**, and click . The target update strategy is set.

Adding Transformations

You can add transformations to an auto-map and specify whether it is applicable to exact match, orphan source, orphan target, or all the rows.

To add transformations in auto-maps, follow these steps:

1. Under the Auto Mapping Preview Grid section, click 🔂.

A	uto Map Transformations					_ 🗆 ×
÷						Li 🗙
#	Кеу	Value	Exact Match	Orphan Source	Orphan Target	All

The Auto Map Transformation page appears.

2. Click 💽.

A row is added to the grid.

- 3. Double-click the cell under the **Key** column and select the required transformation.
- 4. Double-click the cell under the **Value** column and select the value.

Note: You can use transformations created under the Transformations node only for Business Rule. For other transformations, enter the required value.

A	uto Map Transformations					_ 🗆 ×
Ð	3 %					li ×
#	Кеу	Value	Exact Match	Orphan Source	Orphan Target	Ali
1	Business Rule					
		TO_FLOAT ^ TO_INTEGER TRUNC UPPER VARIANCE /				

5. Use the following options:

Exact Match

Use this option to apply the transformation on the exactly matched rows in the Auto Mapping Preview Grid.

Orphan Source

Use this option to apply the transformation on the orphan source rows in the Auto Mapping Preview Grid.

Orphan Target

Use this option to apply the transformation on the orphan target rows in the Auto Mapping Preview Grid.

All

Use this option to apply the transformation on every row in the Auto Mapping Preview Grid.

6. Click

The transformations are added to the auto map.

You can enrich a mapping specification by:

- Adding transformation and lookup details
- Associating code cross walks (code mappings)
- Associating reference tables
- Linking requirements

After creating a mapping specification, you can analyze a mapping specification. <u>Analyzing</u> <u>mapping specifications</u> involves:

- Generating virtual preview of target
- Previewing data
- Performing table gap analysis
- Performing column gap analysis
- Running impact analysis
- Running lineage analysis

- Running end to end lineage
- Opening business view
- Viewing mapping statistics

One to Many and Many to Many Mapping Specifications

You can map multiple source columns to a single or multiple target columns to create a mapping specification. After creating the mapping specification, you can set the target update strategy and enter a description about the strategy.

Creating Mapping Specifications

To create one to many or many to many mapping specifications, follow these steps:

1. In the **Workspace Mappings** pane, click a map.

By default, the Mapping Specification tab opens.

•	Mapping Specifico	tion Grap	nical Designer	Test Specification	Workflow Lo	g	۱.					
20	I 🔯 🔳 🍣 (In	ile_ABC	🔻 🔅 🗟 🛃	3 < 0								
#	Target System Name	Target Target Table Environment Name		Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Colur Scale				

- 2. Click 🜌.
- 3. Switch APPEND OF to ON.

The append mode is enabled. You can now drop multiple columns from the Metadata Catalogue pane in one row of the Mapping Specification grid.

4. Drag one or multiple source columns from the **Metadata Catalogue** pane in the **Mapping Specification** grid under the **Source Columns Name** column.

You can use Ctrl key to select multiple columns in the Metadata Catalogue pane.

<u></u>	APPEND ON	💱 [Integratio	n]	Profiles:	Default	- Ø	à 👯 🖻 🖬 🖬 🛛 🗸 🖉	Data Lake
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	Data Models EDW Erwin_Sales
1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEID	int	4		Fintegration (v1.00) doo.RM_RESOURCE RESOURCEID RESOURCENAME
				RESOUR				RESOURCEDESC RESOURCECELLPHONE RESOURCECHOMEPHONI RESOURCEHOMEPHONI

- 5. Drag single or multiple target columns from **Metadata Catalogue** in **Mapping Specification** under the **Target Columns Name**.
- 6. Click 🔜.

The mapping specification is saved.

You can view the mapping specification on the **Graphical Designer** tab to view the graphical representation of the many to one mappings.

•	Mapping Specification	Graphical Designer	Test Specification	Workflow Log)
2	[in	tegration]			X 🗟 🐚 👯 🗟 <
	dbo.RM_RESOURCE			Π	dbo.RM_RESOURCE_New
P	RESOURCEID (int,4,0,10)	A		<i>p</i>	RESOURCEID_New (int,4,0,10)
Ī	RESOURCENAME (varchar,100	,0,0)	A		RESOURCENAME_New (varchar,100,0,0)
1	RESOURCEDESC (varchar,150,	0,0)	·	Ξ	RESOURCEDESC_New (varchar, 150,0,0)
Ħ	RESOURCECELLPHONE (varch	ar,15,0,0)			RESOURCECELLPHONE_New (varchar, 15, 0, 0)
I	RESOURCEHOMEPHONE (varc	har,15,0,0)	A	Ξ	RESOURCEHOMEPHONE_New (varchar, 15, 0, 0)
E	RESOURCEEMAIL (varchar,50,0),0)			RESOURCEEMAIL_New (varchar,50,0,0)
		V			T

Setting Target Update Strategy

To set target update strategy, follow these steps:

- 1. Expand the Additional Mapping Information pane and click the Target Update Strategy tab.
- 2. On the Target Update Strategy tab, click 🖉.

A Map S	pec Overview	Source Extract SQL		Target Update Strategy		1	Testing Notes		Map Spec Docs		S	Assignm		nt				
		Up	date Sti	ategy	Descrip	otion												×
-	Specified ert else Update		<u>A</u>	H	В	I	U	≣	≣	≣		ŧΞ	E	*≣	*≣	*		
	date else Insert																~	
🔘 Inse	ert																	
🔵 Inc	remental Updat	te																
🔵 Inc	remental																	
🔵 De	lete then Insert																	
🔵 De	lete																	
🔵 Bul	k Load																\sim	
O Oth	ner																	

- 3. Click the required strategy, enter **Update Strategy Description**, and click
- 4. Click 😡.

The source to target mapping is saved.

You can enrich a mapping specification by:

- Adding transformation and lookup details
- Associating code cross walks (code mappings)
- Associating reference tables
- Linking requirements

After creating a mapping specification, you can analyze a mapping specification. <u>Analyzing</u> mapping specifications involves:

- Generating virtual preview of target
- Previewing data
- Performing table gap analysis
- Performing column gap analysis
- Running impact analysis

- Running lineage analysis
- Running end to end lineage
- Opening business view
- Viewing mapping statistics

Adding Transformation and Lookup Details

You can add transformation and lookup details to a mapping specification in the Mapping Specification grid.

Adding transformation details involves setting up:

- Business rule
- Extended business rule transformation

Ensure that you define business rules under the Transformations node for the same ETL Option as the Project ETL. For more information on defining business rules, refer to the Defining Transformations section.

Adding lookup details involves setting up:

- Trans lookup condition
- Lookup reference column
- Lookup on

Ensure that you scan the required table in the Metadata Manager to set trans lookup condition.

Adding Transformation Details

To add business rules to mapping specifications, follow these steps:

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

By default, it opens the Mapping Specification tab.

rkspace Mappings	•	<u>ا</u>	Mapping Specifica	tion Graph	ical Designer	Test Specification	Workflow Lo	g		,
Mappings	^	2	🗉 🔯 🔳 🍣 (Ini	legration]			Profiles: Profi	le_ABC	🔹 🏟 🗟	a < D
Projects Projects Data Lake Migration (3) EDW (3)		#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Col Scale
 ERP (2) Erwin_Project (4) Erwin_Sales (1) Transformations 		1	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEID_New	int	4	10	0
 Test Cases Mappings Integration MappingTargets 		2	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	100	0	0
 Exeter (2) IQVIA (1) New_Project (3) 		3	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEDESC_N	varchar	150	0	0

3. Right-click the header menu of the **Mapping Specification** grid.

	Mapping Specifico	ation Grap	hical Designer	Test Specificatio	n Workflow Lo	og		×
2	🗉 🔯 🔳 🍣 (Ir	itegration]		Profiles: Def	ault	🔹 🕸 🗟	🕻 🗟 < 🗵	
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type Source Table Name	Source Column Length	Business Rule	
1	Erwin_Sales	Integration	dbo.RM_RESOURC		Source Column Name Source Column Data T Source Column Length			^
2	Erwin_Sales	Integration	dbo.RM_RESOURC		Business Rule Extended Business Ru Farget System Name	le Transformatic		
3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDESC	varchar	150		

4. Select the **Business Rule** check box.

The Business Rule column is now available in the Mapping Specification grid.

5. Click 🜌.

You can now edit the Mapping Specification grid.

Double-click the cell under the Business rule column for the required source column.
 The available transformations appear.

<u>۸</u>	apping Specificatio	n Graphico	I Designer To	est Specification	Workflow Log	•
<u>i</u>		lintegration]		Profiles:	Default 🔽 🔯 🗟	👯 🗟 🖬 📾 😣 < 🗵
; 1ment	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	Extended Business Rule Transformation
tion	dbo.RM_RESOURC	RESOURCEID	int	4	1	^
tion	dbo.RM_RESOURC	RESOURCENAME	varchar	100	1-DataGov(HighDate:12/31/9999) ^ 2-DataGov(LowDate01/01/0001) 3-DataGov(AverageChurn) ABORT	
tion	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	ABS ADD_TO_DATE	
tion	dbo.RM_RESOURC	RESOURCECELLPH	varchar	15		

7. Select a business rule.

You can add business rules for multiple source columns.

8. Click 😡.

The business rules are added to the mapping specification.

To add extended business rule transformations, follow these steps:

1. Right-click the header menu of the Mapping Specification grid.

	Mapping Specific	ation Grap	hical Designer	Test Specifica	lion Workfl	ow Log		•
2	🗏 🔯 🔳 🍣 [Ir	ntegration]			Profiles:	Default	🔽 🏟 🗞 👯 🛛 <	
#	Source System Name	Source Environment Name	Source Table Name	Source Colur Name	Source Colu Data Type Source Table Nar	Length	Business Rule	
1	Erwin_Sales	Integration	dbo.RM_RESOURC		3 Source Column N 3 Source Column D 3 Source Column L 7	Data Type		~
2	Erwin_Sales	Integration	dbo.RM_RESOURC		Business Rule Extended Busines Target System Na 7	ss Rule Transformatic		
3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDES	C varchar	150		

2. Select the Extended Business Rule Transformation check box.

The Extended Business Rule Transformation column is now available in the Mapping Specification grid.

3. Click **2**.

You can now edit the Mapping Specification grid.

4. Click 📃

The available options appear.

Workspace Mappings	Mapping Specification Graphical Designer
B_Project (2)	APPEND 077 😪 [Integration]
BBT (1) BFSI Integration Carrefour (9)	Business Rule et ionment ie Target Table Name
Data Lake Mic Data La	Trans Lookup Condition
 Mappings mintegration MappingTarg 	ets 2 Erwin_Sales_Targe Integration_Targe dbo.RM_RESOUR

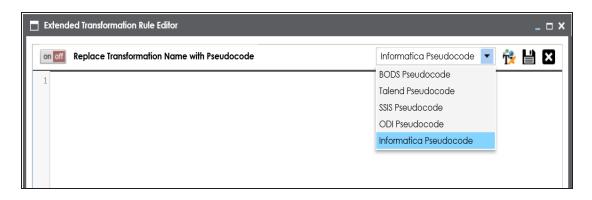
- 5. Select the Extended Business Rule check box.
- 6. In the **Mapping Specification** grid, double-click the cell under the **Extended Business rule Transformation** column for the required source column.

The Extended Transformation Rule Editor page appears.



7. Select a pseudocode based on the Project ETL.

For example, if the Project ETL is Informatica then select Informatica Pseudocode.



8. Press Ctrl + Space keys.

The available transformations appear.

Extended Transformation Rule Editor			- x
on off Replace Transformation Name wi	th Pseudocode	Informatica Pseudocode 💌 🙀 💾	×
1 1 1 2-DataGov(HighDate:12/31/9999) 2-DataGov(LowDate01/01/0001) 3-DataGov(AverageChurn) ABORT ABS ADD_TO_DATE AES_DECRYPT ASCII AVG CEIL CHOOSE CHR CHRCODE COMPRESS CONCAT CONVERT_BASE COS	1-DataGov(HighDate:12/31/9999) Pseudocode: To_date(mm/dd/yyyy,12/31/9999) Intended Use Description: DataGovernance rule - on all projects	use	

If the required transformation is not available in the list, use $\mathbf{\hat{r}}$ to create and update the transformations list.

9. Double-click the required transformation.

You can use mu to replace the transformation name with the pseudocode.

10. Click 💾.

The extended business rule transformation is added to the source column. You can add extended business rule transformation to multiple source columns. You can also

configure UI labels for user defined fields. For more information on configuring UI labels, refer to the <u>Configuring Language Settings</u> topic.

Adding Lookup Details

To add lookup details in mapping specifications, follow these steps:

- 1. Right-click the header menu of the mapping specification grid.
- 2. Select Lookup Reference Column, Lookup On, and Trans Lookup Condition.

• Map	pping Specification	Graphical	Designer Te	st Specification Workflow Log Profiles: Default	, :: @ .
e Column e	Source Column Data Type	Source Column Length	Business Rule	Extended Business Rule	Target System Targe Name Enviro Name
JRCEID	int	4	FLOOR	Lookup Reference Column Lookup On Trans Lookup Condition	Erwin_Sales_Targe Integr
JRCENAME	varchar	100	REVERSE	Source Column Precision Source Column Scale Source Column DB Default Value	Erwin_Sales_Targe Integr
JRCEDESC	varchar	150			Erwin_Sales_Targe Integr

3. Drag the required table from the **Metadata Catalogue** pane and drop it under the **Trans Lookup Condition** column for the required source column.

	Mapping Spec	i fication Gr	aphical Designer Te	est Specification Workflow L	og		•	Metadata Catalogue 🔍
Ó	APPEND	ा 🧞 [Integro	tion]	Profiles: Default	🔽 🏟 🔤	🖹 🖬 🖬 😕	< 🛛	AdventureWorks AMERISURE
ı	Created By	Created Date	Lookup Reference Column	Lookup On	Trans Lookup Condition	Last Modified By	Last M Date T	 BI BO Reports
	Administrator	2020-01-12 20:40:27.5			dbo.ADS_AS	SOCIATIONS	2020 12:2	
	Administrator	2020-01-12 20:40:27.5				Administrator	2020 12:2	
	Administrator	2020-01-12 20:40:27.5				Administrator	2020 20:4	Data_Migration (v1.01 dbo.ADS_ASSOCIA dbo.ADS_FORM dbo.ADS KEY VAL
	Administrator	2020-01-12 20:40:27.5				Administrator	2020 12:2	dbo.ADS_KEY_VAL

A SQL query populates.

Once trans lookup condition is set for the source column, you can add lookup reference column and lookup on.

To add lookup reference column, double-click the cell under the **Lookup Reference Column** column and select the required option.

•	Mapping Speci	ification Gr	aphical Designer Test S	opecification Workflow Log			Þ
×.	APPEND	ा 🥹 (Integra	tion]	Profiles: Default	- 🌣 🗟 🛱	🛛 🖬 📾 😣	< D
۱n	Created By	Created Date	Lookup Reference Column	Lookup On	Trans Lookup Condition	Last Modified By	Last M Date
	Administrator	2020-01-12 20:40:27.5	1		SELECT ID, SOURCE_OBJECT_ SOURCE_OBJECT_ TARGET_OBJECT_I TARGET_OBJECT_I RELATIONSHIP_DET FROM dbo.ADS_ASSOCI,	Administrator	2020 12:2
	Administrator	2020-01-12 20:40:27.5	ID ^ SOURCE_OBJECT_ID SOURCE_OBJECT_TYPE_I TARGET_OBJECT_ID			Administrator	2020 12:2
	Administrator	2020-01-12 20:40:27.5	TARGET_OBJECT_TYPE_IE RELATIONSHIP_DETAIL_ID <			Administrator	2020 20:4

To add lookup on, double-click the cell under the **Lookup On** column and select the required option.

• 2	B 🛃 🗛 Append	ा 🥹 [Integro	ation]	Profiles: Default	🔽 🕸 🗟 😫	🛛 🖬 🖬 😢	< 🖸
n	Created By	Created Date	Lookup Reference Column	Lookup On	Trans Lookup Condition	Last Modified By	Last Date
	Administrator	2020-01-12 20:40:27.5	D		SELECT ID, SOURCE_OBJECT_ SOURCE_OBJECT_ TARGET_OBJECT_I TARGET_OBJECT_I RELATIONSHIP_DET FROM dbo.ADS_ASSOCI,	Administrator	2020 12:2
	Administrator	2020-01-12 20:40:27.5		ID SOURCE_OBJECT_ID SOURCE_OBJECT_IYPE_ID TARGET_OBJECT_ID		Administrator	2020 12:2
	Administrator	2020-01-12 20:40:27.5		TARGET_OBJECT_TYPE_ID RELATIONSHIP_DETAIL_ID		Administrator	2020 20:4

4. Click 😡.

The lookup details are added in the Mapping Specification. You can add lookup details for multiple source columns.

Alternately, you can add transformation and lookup details to a mapping specification graphically. For more information about adding transformation and lookup details graphically, refer to the <u>Graphical Designer</u> topic.

Graphical Designer

You can add transformation and lookup details to a mapping specification on the Graphical Designer tab.

Adding transformation details involves setting up:

- Business rule
- Extended business rule transformation

Ensure that you define business rules under the Transformations node for the same ETL Option as the Project ETL. For more information on defining business rules, refer to the Defining Transformations section.

Adding lookup details involves setting up:

- Trans lookup condition
- Lookup reference column
- Lookup on

Ensure that you scan the required table in the Metadata Manager to set trans lookup condition.

Adding Transformation Details

To add business rules graphically, follow these steps:

- 1. Click the Graphical Designer tab.
- 2. Click 🜌.

You can now edit the mapping specification graphically.

- 3. Click the mapping link of the required column and expand the Properties pane.
- 4. Expand the Transformation Details pane.

4	Mappi	ng Specification	Graphical Designer	Test Specification	Workflo	ow Log		•
Z	3 🗖 🗐		[Integration]	Auto Map	Reset Aut	to Map 🚬 💥 📰 🗐 [à 式 🛛 🖉 🚽 🗸	< 🖻
	n					Properties	8	⊾ >
	Щ					Source Details		•
		dbo.RM RESOUR	CE		dbo.RA	Target Details		•
	<i>*</i>	RESOURCEID (Int,4,0		<u>م</u>	RESOURC	Transformation Details		-
		RESOURCENAME (vo RESOURCEDESC (va			RESOURC	Properties	Value	
		RESOURCECELLPHO			RESOURC RESOURC	Business Rule		
		RESOURCEHOMEPHO RESOURCEEMAIL (VG			RESOURC	Extended Business Rule Transformation		
		RESOURCEEIVIAL (VC	▼.		RESOURC			
						Lookup Details		
						User Defined Details		_
								_
						Miscellaneous Details		^

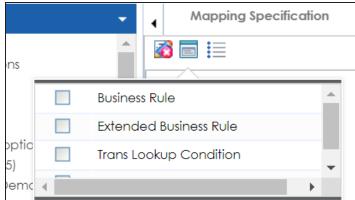
- 5. Double-click the Value cell for Business Rule and select the required value.
- 6. Click 🔜.

The business rule is added to the mapping link. You can add business rules for multiple mapping links.

To add extended business rule transformations graphically, follow these steps:

1. On the Graphical Designer tab, Click 🥅.

The available options appear.



2. Select the Extended Business Rule check box.

3. Click the mapping link of the required column and expand the **Transformation Details** pane.

•	Mappi	ng Specification	Graphical Designer	Test Specification	Workfle	ow Log		•
			[Integration]	Auto Map	Reset Au	to Map 🚬 💥 🖬 🗐	• 👦 👦 🐩 📓 د	< 🖸
	N					Properties	2	± >
	Ц					Source Details		•
						Target Details		•
		dbo.RM_RESOUR RESOURCEID (int,4,0,			dbo.RA RESOURC	Transformation Details		
		RESOURCENAME (vo			RESOURC			
		RESOURCEDESC (va	rchar, 150, 0, 0)	_	RESOURC	Properties	Value	
		RESOURCECELLPHO	NE (varchar,15,0,0)	I	RESOURC	Business Rule		
		RESOURCEHOMEPHO		> 🔳	RESOURC	Extended Business Rule Transformation		
		RESOURCEEMAIL (vo	· · · · · ·	> 🔳	RESOURC	Industormation		
						-		
						Lookup Details		
						LOORUP Details		<u> </u>
						User Defined Details		•
						Miscellaneous Details		•

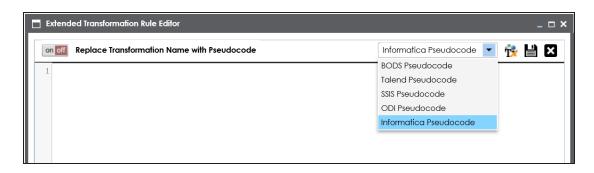
4. Double-click the Value cell for Extended Business Rule Transformation.

The Extended Transformation Rule Editor page appears.

	Extend	ed Transformation Rule Editor	_ _ ×
[on off	Replace Transformation Name with Pseudocode	Informatica Pseudocode 🔽 🉀 💾 🗙
	1		

5. Select the pseudocode based on the Project ETL.

For example, if the Project ETL is Informatica then select Informatica Pseudocode.



6. Press Ctrl + Space keys.

The available transformations appear.

Extended Transformation Rule Editor			_ 🗆 ×
on off Replace Transformation Name wi	th Pseudocode	nformatica Pseudocode 💌 🙀	ĽI X
1 1 1 1 2-DataGov(LighDate:12/31/9999) 2-DataGov(AverageChurn) ABORT ABS ADD_TO_DATE AES_DECRYPT ASCII AVG CEIL CHOOSE CHR CHRCODE COMPRESS CONCAT CONVERT_BASE COS V	1-DataGov(HighDate:12/31/9999) Pseudocode: To_date(mm/dd/yyyy,12/31/9999) Intended Use Description: DataGovernance rule - u on all projects	se	

Note: If the required transformation is not available in the list, use $\mathbf{\hat{r}}$ to create and update the transformations list.

7. Double-click the required transformation.

You can use and to replace transformation name with pseudocode.

8. Click 💾.

The extended business rule transformation is added to the mapping link. You can add extended business rule transformations to multiple mapping links.

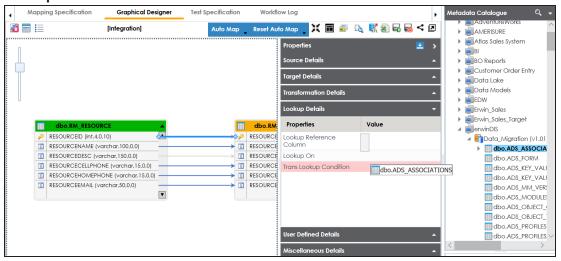
Adding Lookup Details

To add lookup details graphically, follow these steps:

- 1. On the **Graphical Designer** tab, click the mapping link of the required column and expand the **Properties** pane.
- 2. Expand the Lookup Details pane.

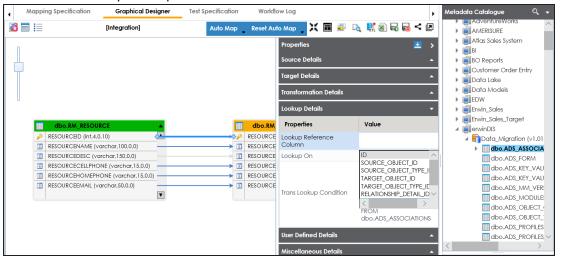
Mapping Specification Graphical Designer	Test Specification Workfle	ow Log	Metadata Catalogue 🔍
👔 🗐 🗎 [Integration]	Auto Map Reset Aut	to Map 🚬 💥 🖬 🗐 🗞 👯 🗟 😡 👦 < 🗵	Files A_System
		Properties 👱 ; Source Details	AMERISURE Atlas Sales System
RESOURCE RESOURCE	dbo.R	Target Details	BI BO Reports Customer Order Entry
RESOURCEID (III, 40, 10) RESOURCENAME (varchar, 100, 0, 0) RESOURCEDESC (varchar, 150, 0, 0)	RESOURC	Lookup Details	Data Lake Data Models
RESOURCECELLPHONE (varchar, 15.0.0) RESOURCEHOMEPHONE (varchar, 15.0.0) RESOURCEEMAIL (varchar, 50.0.0)	RESOURC	Lookup Reference	 ↓ ■ EDW ▲ ■ Erwin_Sales ▲ ■ Integration (v1.00) ▶ ■ dbo.RM_RESOURCI
		Lookup On Trans Lookup Condition	Fintegration_Target (v1 Erwin_Sales_Target
			A Fintegration_Target (v1 B
		User Defined Details	New_Erwin
		Miscellaneous Derails	Metadata Properties 🛛 📙 🛒

3. Drag the required table from the **Metadata Catalogue** pane and drop it for **Trans Lookup Condition**.



Once trans lookup condition is set, you can add lookup reference column and lookup on.

To add lookup reference column, double-click the cell for **Lookup Reference Column** and select the required option.



To add lookup on, double-click the cell against **Lookup On** and select the required option.

4. Click 🔜.

The lookup details are added to the mapping specification. You can add lookup details for multiple mapping links.

Updating Mapping Specifications Manually

After creating a mapping specification, you can update the mapping specification manually. However, we recommend that you use the manual method case by case on exception basis.

To update mapping specifications manually, follow these steps:

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

By default, it opens the Mapping Specification tab.

Workspace Mappings 🗸 🗸	۱.	Mapping Specifica	tion Graph	nical Designer	Test Specification	Workflow L	og		•
Mappings		🗏 🔯 🔳 🍣 (In	egration]			Profiles: Pro	file_ABC	🔻 🕸 🗟 🖡	3 < 0
 Projects Carrefour (9) Data Lake Migration (3) 	#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Colur Scale
 EDW (3) ERP (2) Erwin_Project (4) Erwin_Soles (1) 	1	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEID_New	int	4	10	0
integrations integrations integration integration integration	2	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	100	0	0
 MappingTargets Txeter (2) IQVIA (1) 	3	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEDESC_N	varchar	150	0	0

3. Click 🜌.

You can now edit the Mapping Specification grid.

4. Select a row (use Ctrl key to select multiple rows) and right-click the cell.

	-		[Integration]]	Profi	les: Profile_ABC		• Ô	Da 👫 🗟 🗖	l 💀 😣 🤜	Z
#		arget System ame	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Co Length	olumn	Target Column Precision	Target Colu Scale	mn
1	l Ervi	vin_Sales_Targe	Integration_Target	dbo.RM_RESOURC	RESOURCEID_New	int	4	🛃 Ch	10 neck All Rows	0	
1	2 Erw	vin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	100	📝 Cle	check All Rows ear Source Details ear Target Details		ł
3	3 Erw	vin_Sales_Targe	Integration_Targe:	dbo.RM_RESOURC	RESOURCEDESC_N	varchar	150	📝 Cle	ear Source & Targi ear Cell ilete Row(s)	et Details	
<			IC C R	ecords from 1 to 7	<u>ک</u> ا	Page 1	100 rows per	-E She	tended Properties are Link		`

5. Use the following options:

Check All Rows

Use this option to select the check boxes under the Status column for the selected rows.

Note: Right-click the header menu of the mapping specification grid and select the **Status** check box, to make Status column visible in the mapping specification grid.

Uncheck All Rows

Use this option to unselect the check boxes under the Status column for the selected rows.

Clear Source Details

Use this option to clear source details in the mapping specification grid.

Clear Target Details

Use this option to clear target details in the mapping specification grid.

Clear Source & Target Details

Use this option to clear source and target details in the mapping specification grid.

Clear Cell

Use this option to clear the cell.

Delete Row(s)

Use this option to delete the selected rows.

Extended Properties

Use this option to configure Extended Properties.

Share Link

Use this option to copy or share the URL of the mapping specification.

To update cell values, double-click a cell and update its values.

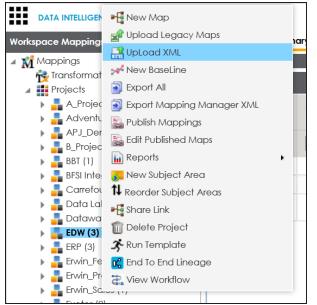
•	Mapping Specifica	ition Graph	nical Designer	Test Specification	Workflow Lo	og		•
		🛛 🎅 [Integration	1]	Profiles:	Profile_ABC	- 🔅 [à 🔣 🛛 🖉	8 < 🗵
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Colu Scale
1	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEID_New	int	4	10	0
2	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	4		
3	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEDESC_M	varchar			

Uploading Mapping Specifications in XML

You can upload a mapping specification to a project in the XML format. You can either use an existing XML file or export it from a suitable project. Ensure that the XML file follows the correct template. For more information on exporting a mapping specification in XML, refer to the Proprietary XML Format topic.

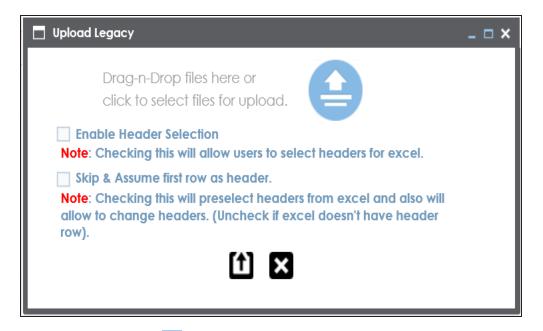
To upload mapping specifications in the XML format, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a project.



3. Click Upload XML.

The Upload Legacy page appears.



4. Drag and drop or use \triangleq to browse and select the XML file.

The Upload Mapping Manager XML page appears.

🔲 Upload Mapping Ma	nager XML	_ _ ×	\$
		1 ×	
Erwin_Project_En	vin_Map_1.07.xml (100% 😣	
Mail Comments			
	Enter Mail Comments.		
Note: Uploading XML to initial stage	will reset workflow st	atus of Mapping	

5. Enter Mail Comments and click 1.

The Mapping Specification is uploaded successfully.

If you have enabled notifications, project users receive notification emails and mail comments from the administrator's email ID. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.

Specifying XPath in Mapping Specifications

Xpath is a potential path expression in XML documents. Hence, if you have imported source or target metadata from XSD files then it is important to specify Xpath. You can specify Xpath in a mapping specification for source and target columns.

To specify Xpath in mapping specifications, follow these steps:

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

Mapping Specification Test Specification Graphical Designer Workflow Log orkspace Mappings 4 📝 🗐 🔯 🔳 🎅 [School] 🏟 🔖 👯 🗟 < 🗵 Profiles: Default • 🖌 🚺 Projects New_Project (3) Target Table Target Environment Target Column Name Target Column Data Type Target Column Length rget System Created By Created Date Las OBIEE (23) Name ıme 🕨 🚦 Sales Data Mart (8) Name Sample_Project (0) School_Data (1) 2020-01-30 ool Integration Integration Projec class section NCName Administrator Adm Transformations 19:43:18.087 🐞 Test Cases 🖌 🔜 Mappings 2020-01-30 🖌 🔚 School NCName ool_Integration Integration_Projec class name Administrator Adm 19:43:18.087

By default, it opens the Mapping Specification tab.

3. Right-click the header menu and select the **Target XPath** and **Source XPath** check boxes.

Mapping Specification Graphical Designer Test Specification					Workflow Log					
📝 🗐 🔯 🗐 🥪 [School]					Profiles: Default 💽 🕸 🗟 <					
rget System 1me	Target Environment Name	Target Table Name	Target Column Name	Data Type	Target Logical Column		Created Date	Targ		
ool_Integratio	Integration_Projec	class	section	NCName	☐ Target SDI Hag ☐ Target SDI Description ☑ Target XPath ☐ Target Table Class	Target SDI Description Target XPath				
ool_Integration	Integration_Projec	class	name	NCName [Target Table Alias	~	2020-01-30 19:43:18.087	./clas		
ool_Integration	Integration_Projec	student	name	string		Administrator	2020-01-30 19:44:33.49	./stuc		
ool_Integration	Integration_Projec	student	age	integer		Administrator	2020-01-30 19:44:33.49	./stuo		

The Target XPath and Source XPath columns are now visible in the Mapping Specification grid.

- 4. Click 🜌.
- 5. Double-click cells under the **Target XPath** and **Source XPath** columns to enter the required XPath.
- 6. Click 😡.

The Xpath is specified in the Mapping Specification.

Mapping Spe	cification	Graphical Designe	r Test Specifi	cation Work	flow Log		,
2 💷 🐼 🔳 🧔	🦻 [School]			Profiles:	Default	🔽 🏟 🗟	👯 🔊 < D
Target Column Length	Created By	Created Date	Target XPath	Source XPath	Last Modified By	Last Modified Date Time	Reference Table
	Administrator	2020-01-30 19:43:18.087	./class/section	./class/section	Administrator	2020-01-30 19:57:40.59	
	Administrator	2020-01-30 19:43:18.087	./class/@name	./class/@name	Administrator	2020-01-30 19:44:33.49	
	Administrator	2020-01-30 19:44:33.49	./student/name	./student/name	Administrator	2020-01-30 19:44:33.49	
	Administrator	2020-01-30 19:44:33.49	./student/age	./student/age	Administrator	2020-01-30 19:57:40.59	

Setting Column Order and Visibility

You can set the column order and visibility in Mapping Specifications and personalize the Mapping Specification grid. This helps you work efficiently.

Column Order

To set the column order in mapping specifications, follow these steps:

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

By default, the Mapping Specification tab opens.

Workspace Mappings 🔹 👻	۰.	Mapping Specifico	tion Graph	ical Designer	Test Specification	Workflow Lo	g	•
Mappings	2	🗉 🔯 🔳 🍣 (Er	win_Map]		Profiles:	Default	- 🌣 🛛	ò, 👯 🔊 < 🖸
Projects Garrefour (9) Garda Lake Migration (3)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
 BOW 200 High (6) BEP (2) Frvin_Project (2) 	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	ID	bigint	8	ABS
 Iransformations Test Cases ▲ Mappings 	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	bigint	8	ABS
Erwin_Map (v1.00) MappingTargets K_New_Mapping (v1.	3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_	bigint	8	ABS

3. Click the required column header, drag and drop the column at the required place.

The Mapping Specifications can be exported with the new column order.

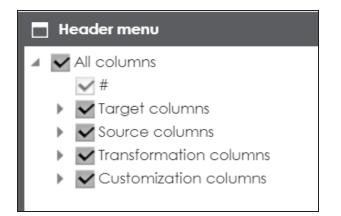
Note: Column ordering in Mapping Specifications are not saved and gets reset.

Column Visibility

To set the column visibility, follow these steps:

1. In the **Mapping Specification** grid, click

The Header Menu page appears.



- 2. Expand the respective nodes.
- 3. Select the required columns.



4. Close the **Header Menu** page.

The selected columns are visible in the Mapping Specification grid.

To reset column ordering and visibility click 🐼.

Updating Additional Mapping Information

You can update additional mapping information in the Additional Mapping Information pane with respect to the following tabs:

Tab	Description
	Under this, you can update the following for a mapping specification:
	 Specification name
Map Spec	 Version label
Overview	State name and sub-state name
	 Source and target metadata sync
	 Job Name XRef
	Under this, you can update:
Source Extract	 SQL Query relevant to a mapping specification
SQL	 SQL Query Description
Target Update	Under this, you can set your target update strategy as per your data integ-
<u>Strategy</u>	ration requirements.
Testing Notes	Under this, you can add relevant testing notes with respect to a mapping spe- cification.
Map Specs	Under this, you can upload relevant documents.
Docs Assignment	Under this you can assign a manning specification to multiple users
Assignment	Under this, you can assign a mapping specification to multiple users.
Specification	Under this, you can link additional specification artifacts relevant to a map-
<u>Artifacts</u>	ping specification.
Level of Effort	Under this, you can record planned level of effort and actual level of effort in creating mapping and ETL process.
	This tab can be enabled in Mapping Manager Settings. Under this, you can
Change Log	capture change logs of a mapping specification.
Release	
Information	Under this, you can view release information of a mapping.
Collaboration	Under this, you can collaborate with other users on a topic.

Tab	Description
<u>Center</u>	
User Defined	There are five user defined tabs that can be used by you with your own UI
Tabs (1-5)	labels.
Extended Prop	Under this, you can extend properties of a mapping specification by creating
<u>erties</u>	custom forms.

To access the Additional Mapping Information pane, follow these steps:

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

The central pane displays the Mapping Specification grid. The Additional Mapping Information pane is available at the bottom of the central pane.

•	Mapping Specifico	ation Grap	hical Designer	Test Specification	Workflow Lo	g	
20	I 🔯 🔳 🍣 (B	rwin_Map]			Profiles: Defe	ault	🔽 🌣 🔖 👯 🗟 < 🗵
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT_I	bigint	8	ABS
•		1					•
		< <	Records from 1 to 6	> > (Page 1	100 rows per page	•
dditio	nal Mapping Infor	mation					
Ma	o Spec Overview	Source Extract S	QL Target Update	e Strategy Tes	ting Notes Ma	ap Spec Docs	Assignment Specification
							Ø

3. Click the Additional Mapping Information pane.

You can use *d* or **b** to navigate across the pane.

Mapping Specification	Graphical Designer	Test Specification	Workflov	w Log		•
📝 🗐 🐼 🔳 🍣 [Erwin_Map]			Profiles: [Default	- 🌣 🗟	式 🗢 🖻
# Source System Source	Source Table	Source Column	Source Colum		Rusiness Pula	
< <	Records from 1 to 6	> >	Page 1	100 rows per page	•	
Additional Mapping Information						~
Map Spec Overview Source Extra	ict SQL Target Update	Strategy Test	ing Notes	Map Spec Docs	Assignment	Specification
						^
Map Id	237	Wo	rkflow Status	Draft	6	
Specification Name	Erwin_Map					
Map Specification Version	1.05					
Version Label	Data_Migration					
State Name	In Progress	S. J.	State Name			
Sync Source Metadata	OFF	Syr	c Target Metao	data OFF		
Job Name XRef						
Mapping Description	mapping description				A	
						-

Updating Map Spec Overview

You can update the Map Spec Overview tab and update various aspects of a mapping specification that includes:

- Specification name and its description
- Version label
- Mapping states and sub-states
- Syncing metadata with a mapping specification
- Job name XRef

To update the Map Spec Overview tab, follow these steps:

1. In the Additional Mapping Information pane, on the Map Spec Overview tab, click

Additional Mapping Information					
Map Spec Overview Source I	Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	Assignment
					≟ ×
Map Id	72		Workflow Status	Preliminary Draft	
Specification Name	erwinSa	esIntegration			
Map Specification Version	1.00				
Version Label					
State Name	In Progr	ess 🗸	Sub State Name	Select	~
Sync Source Metadata			Sync Target Metc	adata 💽	
Job Name XRef					
Mapping Description	<u>a</u>	<u>А</u> <u>н</u> в <u>г</u>	FEEE		'≣ ∢
					-
Assigned To					

2. Select or 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 mapping specification name.
Specification	For example, EDW_PROD_IDS_Benefits_Detail.
Name	For more information on naming conventions, refer to the <u>Best</u>
	Practices section.
	Specifies the version label of the mapping specification.
Version Label	For example, EDW_PROD_IDS_Benefits_Detail (Alpha).
	For more information on configuring version display of maps, refer to
	the Configuring Version Display topic.
	Specifies the mapping state of the mapping specification.
State Name	For example, In Progress.
	For more information on configuring mapping states, refer to the Con-
	figuring Mapping State Settings topic.
	Specifies the sub-state of the mapping specification.
Sub State	For example, Needs Approval.
Name	For more information on configuring mapping sub-states, refer to the <u>Configuring Mapping State Settings</u> topic.
Sync Source	Switch Sync Source Metadata to ON to sync source metadata with the
Metadata	mapping specification.
Sync Target	Switch Sync Target Metadata to ON to sync target metadata with the
Metadata	mapping specification.
Job Name	Specifies the equivalent ETL mapping name.
XRef	For example, ErwinDIS931.
	Specifies the description for the mapping specification.
Description	For example: This is a map between EDW source and IDS target sys- tems.

Note: You cannot edit Map Id, Workflow Status, and Map Specification Version.

For more information on workflow status, refer to the <u>Managing Mapping Manager</u> <u>Workflows</u> topic.

3. Click 💾.

The fields on the Map Spec Overview tab are updated.

Updating Source Extract SQL

You can keep a record of multiple source extract SQL and its description. You can also update it as per your requirements.

To update source extract SQL, follow these steps:

1. In the Additional Mapping Information pane, click the Source Extract SQL tab.

The Source Extract SQL tab appears.

Mapping Specifica	ation Grap	hical Designer	Test Specific	ation Workf	low Log	
	< <	Records from 1 to	6 > >	I 🜔 Page I 🖕	100 rows per page	-
Additional Mapping Infor	mation					
Map Spec Overview	Source Extract S	QL Target Upda	ite Strategy	Testing Notes	Map Spec Docs	Assignment
						Ø
SQL Query						•
						-
SQL Query Description						
						-

2. click 🖉.

Source	Extra	ct SQL	To	Irget	Update	e Strate	gy	Tes	ting N	lotes	1	Nap S	pec l	Docs	A	Assignmen
														=		×
1	<u>A</u>	H	в	I	U	≣	≣	3		4 25	E	*≣	•≣	*		
I															•	
															-	
1	<u>A</u>	H	В	I	U	≣	≣	3		4 3 3	I≡	*≣	*≣	*		
															•	
	2	Source Extra	Source Extract SQL	Source Extract SQL	Source Extract SQL Target	Source Extract SQL Target Update	Source Extract SQL Target Update Strate	Source Extract SQL Target Update Strategy	Source Extract SQL Target Update Strategy Tes	Source Extract SQL Target Update Strategy Testing N	Source Extract SQL Target Update Strategy Testing Notes	Source Extract SQL Target Update Strategy Testing Notes	Source Extract SQL Target Update Strategy Testing Notes Map S	Source Extract SQL Target Update Strategy Testing Notes Map Spec I	Source Extract SQL Target Update Strategy Testing Notes Map Spec Docs	Source Extract SQL Target Update Strategy Testing Notes Map Spec Docs A

3. Enter SQL Query and SQL Query Description.

For example:

- SQL Query: Select * from dbo.RM_Resource
- SQL Query Description: The query extracts the data from dbo.RM_Resource table.
- 4. Click

The Source Extract SQL is updated.

Setting Target Update Strategy

You can set the way target metadata is updated when you map source to target. You can update the strategy any time as per your requirement.

To set target update strategy, follow these steps:

1. In the Additional Mapping Information pane, click the Target Update Strategy tab.

Ad	ditional Mapping Infor	mation				
•	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	Assignment
						d B
		Update St	rategy Description			_
(UnSpecified					
(🔵 Insert else Update					
(Update else Insert					
(🔵 Insert					
(🔵 Incremental Upda	te				
(Incremental					
(Delete then Insert					
(Delete					
(🔵 Bulk Load					•
(Other					

2. Click 🖉.

Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	Assignment
	Update Str	ategy Description			Ľ ×
O UnSpecified					
🔘 Insert else Update	à 🛓	<u>H</u> B <i>I</i> <u>U</u>		<u></u> ≣* ≣* ⊒	*
🔘 Update else Insert					~
 Insert 					
🔘 Incremental Updat	e				
Incremental					
 Delete then Insert 					
🔘 Delete					
🔘 Bulk Load					\sim
Other					

3. Click the appropriate update strategy from the options and enter **Update Strategy Description**.

For example:

- Update strategy: Insert else Update
- **Update Strategy Description**: Insert the source column value to a blank target column else update the target column value with the source column value.
- 4. Click 💾.

The Target Update Strategy is set.

Updating Testing Notes

You can keep a record of testing notes related to a mapping specification and specify test results as:

- Un-specified
- Pass
- Fail
- Needs analysis

To update testing notes, follow these steps:

1. In the Additional Mapping Information pane, click the Testing Notes tab.

Ac	Iditional Mapping Inform	mation				
•	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	Assignment
		Testing No.				Ø
	 UnSpecified 	Testing Not	les			
	- onopooliiou					
	Pass					
	🔵 Fail					
	 Needs Analysis 					
						-

2. Click 🖉.

Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	Assignment
	Testing Not	es			Ľ ×
 UnSpecified 	۵ 🗗	<u>H</u> B <i>I</i> <u>U</u>	≣ ≣ ≣ ≣	j≘ i ≘ t≊ t≊	*
Pass					
🔵 Fail					
Needs Analysis					-

3. Click the appropriate option for test results and enter **Testing Notes**.

For example:

- Test results: Pass
- Testing Notes: The mapping specification passed the testing and it is ready for the ETL process.
- 4. Click 💾.

The Testing Notes are updated.

Adding Mapping Specification Documents

You can add supporting documents, such as text files, audio files, video files, document links, and so on to a mapping specification.

To upload mapping specification documents, follow these steps:

1. In the Additional Mapping Information pane, click the Map Spec Docs tab.

A	dditional Mapping Infor	mation					
4	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	Assignment	Specification Artifacts
		n			B		
							÷

2. Click 💽.

Mup spec Overview	Source Extract SQL Tar	get Update Strategy	Testing Notes	Map Spec Docs	Assignment	Specification Artifac
Document Name	Document Link	Document Status	Intended Use	Description		Options
						×
Document Name*			Document	Owner		
Document Object	Drag-n-Drop files he click to select files f		Document	Link		
Intended Use Description	ъ <u>А</u> н	B <i>I</i> <u>U</u> ≣		j≘ i ≘ t≊ t≊		
					•	
					•	

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
Document Name	Specifies the name of the physical document being attached to the map- ping specification. For example, Mapping Details.
Document Object	Drag and drop document files or use ≐ to select and upload document files.
Document	Specifies the document owner's name.
Owner	For example, John Doe.
Document	Specifies the URL of the document.
Link	For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn- b5YkMBq4ptA7jhg5/view
Description	Specifies the description of the document.
Description	For example: The document has information about the mapping details.
Approval	Specifies whether the document requires approval.
Required Flag	Select the Approval Required Flag check box to select the document status.
	Specifies the status of the document.
Document	For example, In Progress.
Status	Select the status of the document from the drop down. This field is avail- able only when the Approval Required Flag check box is selected.

4. Click 💾.

The mapping specification document is added.

Assigning Mapping Specifications to Users

You can assign a mapping specification to your team members in the following capacities:

- Mapping Designer
- Mapping Approver
- Mapping ETL Developer
- Mapping Tester

By default, the user that creates the mapping specification is the Mapping Designer. You can re-assign another user as the Mapping Designer.

To assign mapping specifications to users, follow these steps:

1. In the Additional Mapping Information pane, click the Assignment tab.

Ac	Iditional Mapping Information					
4	Target Update Strategy	Testing Notes	Map Spec Docs	Assignment	Specification Artifacts	Level of Effort
		Assigned To			Status	
	Mapping Designer	Administrator - D	efault System User(Ad	dministrat	In Progress	
	Mapping Approver					
	Mapping ETL Developer					
	Mapping Tester					
	Distribution / CC List					
	Custom Notes					
						*

2. Click 🖉.

Additional Mapping Information			*
Map Spec Overview Source	Extract SQL Target Update Strategy	Testing Notes Map Spec Docs	Assignment Specification Artifacts
	Assigned To	Status	Email
Mapping Designer	Administrator - Default System User(Admin	 In Progress 	•
Mapping Approver	Select	▼ Select	
Mapping ETL Developer	Select	▼ Select	
Mapping Tester	Select	▼ Select	×
Distribution / CC List			
Custom Notes			
			ease Indent
		Inco	
			•

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					
Mapping	Specifies the User Full Name and User ID of the Mapping Designer.					
Designer	For example, Jane Doe(janedoe).					
Mapping	Specifies the User Full Name and User ID of the Mapping Approver.					
Approver	For example, John Doe(jdoe).					
Manning [T]	Specifies the User Full Name and User ID of the Mapping ETL					
Mapping ETL Developer	Developer.					
Developei	For example, John Denver(jdenver).					
Mapping	Specifies the User Full Name and User ID of the Mapping Tester.					
Tester	For example, Michael Samuel(M.Samuel).					
Status	Specifies the status of the user's task.					
Status	For example, Pending Review.					
	The Email check boxes populate as you select corresponding users.					
Email	Select the check boxes to send email notifications to the cor-					
	responding users about the mapping assignment and change in map-					

Field Name	Description
	ping status.
	For more information on configuring email notifications, refer to the
	Configuring Notifications topic.
	Enter a comma-separated list of email IDs that should receive the
Distribution/CC	email notification about the assignment.
List	For example, ab.dav@xyz.com, cal.kai@xyz.com
	The email notification is sent from the <u>administrator's email ID</u> .
	Specifies custom notes about the mapping assignment.
Custom Notes	For example: John Denver is the Mapping ETL Developer of the map-
	ping specification.
	Specifies the changes in the mapping assignment. The information in
Assignment	this field is system-generated.
Changes	For example: User Administrator - Default System User(Admin-
changes	istrator) has been assigned to the mapping on 2020-01-12
	19:58:15.815.

4. Click 💾.

The mapping specification is assigned to the users.

Linking Additional Specification Artifacts

The Requirements Manager captures functional requirements of a data integration project using Specification Artifacts. You can link these specification artifacts with mapping specifications.

To link specification artifacts with mapping specifications, follow these steps:

1. In the Additional Information pane, click the Specification Artifacts tab.

Ade	ditional Mapping Ir	nformation					
•	Testing Notes	Map Spec Docs	Assignment	Specification Artifacts	Level of Effort	Change Log	Release Information
							67

2. Click 🖉.

Add	itional Mapping Information						
•	Target Update Strategy	Testing Notes	Map Spec Docs	Assignment	Specification Artifacts	Level of Effort	Release Information
						Ľ Ľ	

3. In the right pane, expand the **Specification Artifact Catalogue** pane and drag and drop the required specification under the **Specification Artifacts** tab.

	Mapping Specific	ation Graph	hical Designer	Test Specification	Workflow Lo	g	•	Metadata Catalogue	୍	•
	ji 🐼 🗐 🍣 (E	rwin_Map]		Profiles:	: Profile_ABC	- ¢	🐧 👯 🛛 < 🖸	Code Mappings Catalogue		•
Addit	Carget System Target Update Stree	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Specification Artifact Catalogue Specification Templates Catalogue > EDW (1) > APJ (1) > Ary (1) > APJ (1) > Provide and		•
								Reference Table Catalogue		

4. Click 💾.

The specification artifact is linked.

Recording Level of Effort

2.

You can record and compare planned level of effort with the actual level effort spent on creating and managing mapping specifications.

To record the level of effort, follow these steps:

1. In the Additional Mapping Information pane, click the Level of Effort tab.

Testing Notes	Map Spec Docs	Assignment	Specification Artifacts	Level of Effort	Change Log	Release Information	Collaboration Center	User Defined1
ned Level of Effort	ł				Actual Level of Effort			Ø
ping Effort 0.	.0 Days				Mapping Effort	0.0 Days		-
ffort 0.	.0 Days				ETL Effort	0.0 Days		
es					Notes			
				W				

Planned Level of E	iffort	Actual Level of Effort		li ×	
Mapping Effort	0.0 Days	Mapping Effort	0.0	Days	
ETL Effort	0.0 Days	ETL Effort	0.0	Days	
Notes		Notes			
ъ <u>А</u> н	B <i>I</i> <u>U</u> ≡ ≡ ≡ ≡ ≒ ≒ ≒ ≰ ≼	ĩar <u>A</u> <u>H</u> ∎	: <u>I</u>	! ■ ≡ ≡ ■ = = '= ≰ ✔	
					*
	Ψ				∇

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	Sub- Fields	Description
	Mapping Effort	Specifies the planned mapping effort in days. For example, 11.5 days.
Planned Level of Effort	ETL Effort	Specifies the planned ETL effort in days. For example, 10.5 days.
	Notes	Specifies notes about the planned level of effort. For example: Planned level of effort took all the project requirements into account.
	Mapping Effort	Specifies the actual mapping effort in days. For example, 11.0 days.
Actual Level of	ETL Effort	Enter the actual ETL effort in days. For example, 9.5 days.
Effort	Notes	Specifies the notes about the actual level. For example: Actual level of effort were lesser than the planned level of effort.

4. Click 💾.

The level of effort tab is recorded.

Viewing Change Logs

A change log is a record of changes made in a Mapping Specification grid. You can view these changes on the Change Log tab. By default, this tab is disabled. You can enable it under Change Log Settings. For more information, refer to the <u>Configuring Change Log Settings</u> topic.

To view the change logs of the mapping specifications, in the **Additional Information** pane, click the **Change Log** tab.

Workspace Mappings 🔹 👻	<u>، ۱</u>	Napping S	pecification Graphical Designer Test Specification Workflow Log			
Mappings Transformations	20	🔯 🗉	😌 [Erwin_Map]	Profiles:	Default	\$ 🐧 👯 🛛 < 🛛
Projects			K < Records from 1 to 6 >> K Page 1 🖉 100 rows per page			
🕨 🚦 Data Lake Migration (3)			· · · · ·			
) 🚦 EDW (3)	Addition	nal Mappi	ng Information			`
) 🔒 ERP (2)	, c Doc	:s A:	signment Specification Artifacts Level of Effort Change Log Release Information Collabo	ation Center User Defin	ed1 User Defined2	User Defined3
🛛 📲 Erwin_Project (2)	1					
ransformations	#	Log Id	Changed Log Description	Map Version	Last Modified By	Last Modified Date Time
🍓 Test Cases	1	20	Version Label Modified.	1.05	Administrator	2019-11-21 19:28:03.0
🖌 🔜 Mappings	2	21	Changed the Version Label	1.05	Administrator	2019-11-21 18:10:06.0
Erwin_Map MappingTargets	3	22	Sync Source Metadata was made ON	1.05	Administrator	2019-11-21 16:45:37.0
Archive		23	Edited Mapping Specification Name.	1.05	Administrator	2019-11-21 15:59:27.0
K_New_Mapping		24	Edited Specification Name.	1.05	Administrator	2019-11-21 15:58:11.0
Exeter (2)	-	24		1.05	Administrator	2017-11-21 15:01:42.0
) 🚦 IQVIA (1)	0	20	Business rule was updated.	1.05	Administrator	2019-11-21 13:01:42:0

The change logs of the mapping specification appears.

Viewing Release Information

The release, migration, and audit-related information of a mapping specification are available on the Release Information tab. For more information on releases, refer to the <u>Release</u> <u>Manager</u> section.

To view release information of mapping specifications, in the **Additional Mapping Inform**ation pane, click the **Release Information** tab.

Additional M	apping Informat	ion					
C Docs	Assignment	Specification Artifacts	Level of Effort	Change Log	Release Information	Collaboration Center	User Defined1
Release	Details						
Release	R	elease_Name			Project	Project_Name	
Status	F	ENDING APPROVAL			Owner		
Migratio	n Details						
From	E	DEV			То	TEST	
Live Dat	e 1	1/29/2019 HH:MM AM/PM			Migration Date	11/29/2019 HH:MM AM/	PM
Audit De	etails						
Created	By A	Administrator			Created Date	11/29/2019	
Last Mo	dified By 🛛 🗚	Administrator			Last Modified Date	11/29/2019	

The release information of the mapping specification appears.

Setting Up Collaborations

You can start discussions on mapping projects or a relevant topic with your team using the Collaboration Center. This enables you and your team to work together.

To set up collaborations, follow these steps:

1. In the Additional Mapping Information pane, click the Collaboration Center tab.

,	ping Specification 🗸 🗸 🗸 🗸 🗸 🗸	Mapping
•	tional Mapping Information	Additiona
•	Target Update Strategy Testing Notes Map Spec Docs Assignment Specification Artifacts Level of Effort Release Information Collaboration Center	↓ QL
	arch Search Search	Search

2. Click +

The Add Topic page appears.

🔄 Add Topic	_ 🗆 X
	→ 븝
Topic Name*:	
Description :	

- 3. Enter the **Topic Name** and **Description**.
- 4. Click 💾.

The new topic is saved and added to the list of topics on the Collaboration Center tab.

You can manage a topic using the options available under Topic Options (). <u>Managing a</u> topic involves:

- Viewing, editing, or deleting a topic
- Assigning users
- Managing notifications
- Saving topic conversations
- Sharing a topic

Configuring Extended Properties

You can configure user-defined properties of a mapping specification under the **Extended Properties** tab.

First, you need to set up a form and then use it to configure the user-defined extended properties.

To configure extended properties of mapping specifications, follow these steps:

1. In the Additional Mapping Information pane, click the Extended Properties tab.

The Extended Properties tab appears.

Ade	Additional Mapping Information										
4	Change Log	Release Information Collaboration Center	User Defined1	User Defined2	User Defined3	User Defined4	User Defined5	Extended Properties	•		
	Configure Edit	Delete					Import Fro	om Excel Export To Ex	cel		
For	m Values										
				No Data Found							

2. Click Configure.

Extended Pro	Extended Properties Configuration										
Edit Delete											
Field Controls											
Group	Text Box	Combo Box	List	O Radio	Check Box	Number	Boolean	Date Picker	Category	Rich Editor	
Configure Form											

The Extended Properties Configuration page contains the following sections:

- Field Controls: Use this pane to get the required UI elements.
- Configure Form: Use this pane to design forms using the available UI elements in the Field Controls pane.
- Properties: Use this pane to view the properties of the UI element selected in the Configure Form pane.

- 3. Click Edit. Then, double-click or drag and drop the required UI elements from the **Field Controls** pane to the **Configure Form** pane.
- 4. Select UI elements, one at a time, and configure their properties in the **Properties** pane.

Extended Properties Configuration				- 1	o x
Save Cancel Delete					
Field Controls					
Group Text Box Combo Box		k Box Number	Boolean Date Picker	Category Rich Editor	
Configure Form			Properties		i.
	<u>а н</u> в <i>г</i> ц		Property	Value	
Rich Editor			Published	ON	
			Field	Rich Editor	
		*	Туре	Rich Editor	
			Dependencies	Type or click here	-
			Configure Values	Configure	
			Mandatory	OFF	
			Regular Expression		
			Description		
			Visible in Extended Properties		
			Order	1	
			Note [*] : 1. Double click on the field c 2. Select the field name to up		

Note: The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description
Published	Switch Published to ON to publish the field.
	Specifies the field label.
Field	To change the field labels, double-click the corresponding Value cell.
	For example, Mapping Specification Approved On.
	Specifies the type of the field.
Туре	To select field types, double-click the corresponding Value cell.
	For example, Date Picker.
Configure Values	Specifies the connectors for the field.
Configure Values	To enter option values, click Configure Values .

Property	Description
	Use the following options:
	 Default connector: Use this option to enter option values manually.
	Reference Data Manager : Use this option to pull option val-
	ues from reference tables in the Reference Data Manager.
Mandatory	Specifies whether the field is mandatory.
	Specifies the field description.
Description	To enter field descriptions, double-click the corresponding Value
	cell.
Visible in Exten-	Switch Visible in Extended Properties to ON to make it visible on
ded Properties	the Extended Properties tab.
	Specifies the order of the field on the Extended Properties tab.
	To enter the order number, double-click the corresponding Value
Order	cell.
	You can also drag and move fields in the Configure Form pane to change its order.

5. Click Save.

The form is saved, and is available on the Extended Properties tab.

Branching and Merging Maps

Branching a map enables multiple users to work on a mapping specification. You can create multiple branches of a parent map depending on the number of users. Different users can work on these branches and make changes in the mapping specification. These branches can then be merged into the parent map.

Branching and merging maps involves:

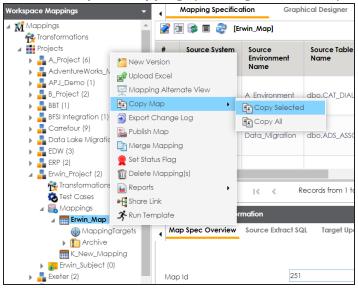
- Branching maps
- Merging changes into parent maps

Branching Maps

Branching a map means copying the map and pasting it in another subject area or a project. The copied map acts as a child map and the original map is called the parent map.

To branch maps, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a map and hover over the Copy Map.



- 3. Click Copy Selected.
- 4. Right-click the Mappings node under the required project or subject area.

Workspace Mappings			•		Mapping Specifico	ition
 BBT (1) BFSI Integration (1))	•		ŧ	🗏 🔯 🔳 🍣 (Er	win_N
 Arrefour (9) Data Lake Migrati EDW (3) 	on (3)		#		Source System Name	Sou Env Nai
ERP (2)	15	l		1	A_System	A_Er
Test Cases A State of the set of t				2	erwinDIS	Date
⊕ Mappin ▶ 🎦 Archive K_New_Ma ▲ 💦 Erwin_Subject	pping		•			
 Mapping: Exeter (2) IQVIA (1) 	⊷¶ New M				ping Infor	≥] natio
 New_Map (0) New_Project (3) OBIEE (23) Sales Data Mart X_Project (1) 	Paste Map Verview Run Template End To End Lineage					Soui

5. Click Paste.

The mail comments page appears.

Mail Comments	_ 🗆 🗙

6. Enter Mail Comments and click

The map is copied successfully into the subject area or the project. You can rename the child map and modify as needed. For example, you can change the reference

table, business rule, or add or remove columns. For more information on renaming mappings, refer to the <u>Updating Map Spec Overview</u> topic.

If you enable notifications in Mapping Manager Settings, project users receive an email notification when the map is copied to a project. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.

Merging Changes into Parent Maps

After making the required changes in a child map you can merge it with a parent map. You can also notify project users about the merge through email notifications.

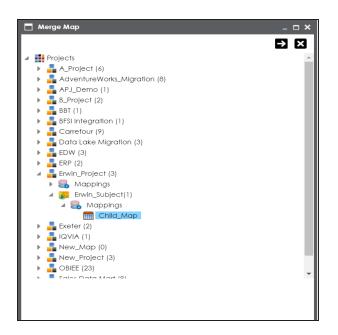
To merge child maps with parent maps, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a parent map.



3. Click Merge Mapping.

The Merge Map page appears.



- 4. Select a child map.
- 5. Click 🔁.

The Merge Map page shows the changed data with respect to the parent map.

⊙ 0v	erwrite existing version 👩 Create New version					
Select	Title/Map Name	Target System Name	Target Environment Name	Target Table Name	Target Column Name	
•	🖃 📄 Changed Data					
	Erwin_Map(1.07) [Erwin_Project]					
•	Child_Map(1.00) [Erwin_Project/ Erwin_Su					
	Erwin_Map(1.07) [Erwin_Project]	erwinDIS	Data_Migration	dbo.ADS_New_ASSOCIATIONS	ID_New	
•	Child_Map(1.00) [Erwin_Project/ Erwin_Su	erwinDIS	Data_Migration	dbo.ADS_New_ASSOCIATIONS	ID_New	
•	= 🗋 Unchanged Data					
•	Erwin_Map(1.07) [Erwin_Project]					
•	Erwin_Map(1.07) [Erwin_Project]					
•	Erwin_Map(1.07) [Erwin_Project]					
•	Erwin_Map(1.07) [Erwin_Project]					
-1-	Records from 1 to 18 of 18				•	
ail Cor	nments					
Nail Co	mments Overwriting the existing Erwin_Map.					

6. Use the following options:

Overwrite existing version

Use this option to overwrite the existing version.

Create New Version

Use this option to create new version of the parent map.

7. Enter relevant Mail Comments.

8. Click 💾.

The child map is merged with the parent map.

If you enable notifications in the Mapping Manager Settings the project users receive mail comments through an email notification. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.

Deleting Maps

You can delete maps that are not required in a project. You can also opt to delete all the versions of a map.

To delete maps, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, select a map or multiple maps.

You can use shift key to select multiple maps.

3. Right-click the selection.

Wor	kspace Mappings	•	•	Mapping Specifico	ation
•	BFSI Integration (1)	•	2 0	I 🔯 🔳 🍣 [4	L_Custom
•	Carrefour (9)				
►	Lata Lake Migration (3)		#	Source System Name	Source Environr
►	📲 EDW (2)			Nume	Name
►	📲 ERP (2)				
►	Erwin_Project (2)	_			
►	Exeter (2)				
►	📲 IQVIA (1)				
►	New_Project (1)				
►			2		
- 4	📲 Sales Data Mart (8)				
	🙀 Transformations				
	🔁 Test Cases		3		
	🔺 🔜 Mappings				
	2-L_Customer_Dim (v6.	.00)			
	3-L_Customer (v6.00)	Compc	ino To		
	4_L_Customer_dim (v6	_			
	MappingTargets	Copy N	1ap	•	
	Archive	🛅 Delete	Mapping	g(S)	
	4_Load_customer_dim	A ROTTION	nplate		
	L_Customer_Dim (v6.0				
	L_Suppliers (v6.00)				

4. Click Delete Mapping(s).

The Delete Mappings-Selected Mappings List page appears.

Delet	le Mappings - Selected Mappings List				
	X				
#	Project Hierarchy	Map Name	Current Version	All Versions	
1	Sales Data Mart	4_L_Customer_dim			3
2	Sales Data Mart	3-L_Customer			

5. Use the following options:

Remove Mapping from Current Selection (🗮)

Use this option to remove mappings from the current selection.

Delete all Versions

Use this option to delete all versions of the mappings.

Delete Current Version

Use this option to delete current version of the maps.

Viewing Workflow Logs

A default workflow, Mapping_Manager_Default_Workflow is assigned to all projects in the Mapping Manager. You can also create a workflow and assign it to your project. For more information on assigning workflow to projects, refer to the <u>Managing Mapping Manager</u> Workflows section.

You can view the flow of actions of the workflow assigned to a map. Along with other information, the workflow displays the current state of the map in the workflow.

To view workflow logs, follow these steps:

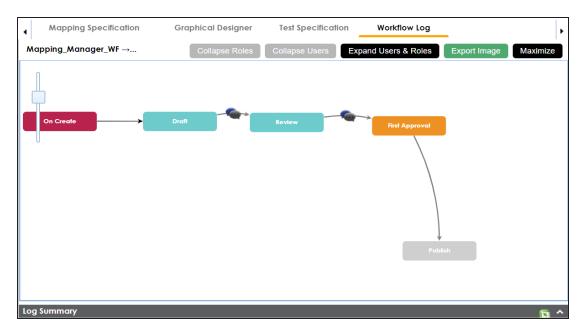
- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, click a map.

By default, the Mapping Specification tab opens.

Workspace Mappings 🔹 👻	•	Mapping Specifico	ition Graph	nical Designer	Test Specification	Workflow Lo	g	•
Mappings Transformations	2	🗏 🔯 🔳 🍣 (Er	win_Map]		Profiles: D	efault	🔽 🗘 🐚	🕺 🗟 < 🛛
Projects Fivin_Project (1)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
 Test Cases Mappings Erwin_Map (v1.01) 	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	ID	bigint	8	ABS
 MappingTargets Trchive 	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	SOURCE_OBJECT_	. bigint	8	ABS

3. Click the Workflow Log tab.

The workflow log of the map appears. The current workflow stage blinks in the diagram.



Use the following options:

User Comments () ()

Use this option to view users and their comments in each stage.

Expand/Hide Users and Roles

Use this option to view or hide users and roles assigned to workflow stages.

Collapse/Expand Roles

Use this option to switch between the collapsed and expanded roles view. This option is enabled when you are in the Expand Users and Roles view.

Collapse/Expand Users

Use this option to switch between the collapsed and expanded users view. This option is enabled when you are in the Expand Users and Roles view.

Export Image

Use this option to download the workflow in the JPG format.

Analyzing Mappings

This section walks you through the multiple ways of analyzing source to target mappings. Analyzing mappings involves:

- Data preview
 - Generating virtual preview of target
 - Previewing data through Metadata Catalogue
- Gap analysis
 - Performing table gap analysis
 - Performing column gap analysis
- Impact analysis
 - Running impact analysis for tables and columns
- Lineage analysis
 - Running dual, forward, or reverse lineage analysis
 - Running end to end lineage
- Business view
- Mapping statistics

Generating Virtual Preview of Targets

When you create a mapping specification, source column values undergo modifications based on the applied transformations. These modified values are updated in target columns based on the target update strategy. You can generate a virtual preview of targets to view the updated target columns.

Note: Mapping specifications involving multiple source or target systems do not support virtual preview of targets.

To generate a virtual preview of targets, follow these steps:

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

The Mapping Specification grid appears.

orkspace Mappings 🛛 👻		Mapping Specifico	ation Grap	hical Designer	Test Specification	Workflow Lo	g	
Mappings ^			2 [Integratio	n]	Profil	es: Default	Ţ Ø	: 🗟 🔣 🗟 🖶 🔂 < (
 Projects Data Lake Migration (3) EDW (3) 	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
 ERP (3) Erwin_Project (5) Erwin_Sales (1) Transformations Test Cases Mappings 	1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEID	int	4	FLOOR
	2	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCENAME	varchar	100	REVERSE
 New_Project (3) OBIEE (23) 	3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	

3. Click 🔦.

Mapping Preview page appears, displaying the virtual preview of the target based on the source and transformations.

Note: Mapping preview is currently supported for RDBMS only. Here is the list of transformation supported in Mapping Preview:

CONCAT, LTRIM, RTRIM, TRIM, CEIL, FLOOR, RPAD, LPAD, ROUND, SQRT, SUBSTR, UPPER, LOWER, TRUNC, SIN, COS, TAN, SINH, TANH, REVERSE, IS_DATE, IS_NUMBER, IS_SPACES, ISNULL, IIF, ISEMPTY, NVL, DECODE.

Mapping Preview					_ 🗆 X
					10 🔍 🍇
RESOURCEID_New	RESOURCENAME_New	RESOURCEDESC_New	RESOURCECELLPHONE_New	RESOURCEHOMEPHONE_New	RESOURCEEMAIL_New
1	nimdA				
2	rahdirS kitraK				
3	emaN_ecruoseR	desc			
4	srelliV eoJ				

You can download the mapping preview details in the XLSX format. To download the mapping preview details, click 🔊 .

Previewing Data

You can preview data in a table using the Metadata Catalogue pane. You can also enter SQL queries to preview the required data in the database.

To preview data from databases, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, click a project.

The Metadata Catalogue pane appears on the right.

Workspace Mappings	•	. '	Mapping Sun	nmary F	Project Details	Project Doo	cuments	Project Users	Extended Properties	Colla 🖡	Metadata Catalogue	୍
🔺 👖 Mappings		Мар	ping Search							*	🔺 🏭 Metadata	
rransformations ▲ I Projects		Map	ping Details							U v	 i 3rd Party Flat Files i A_System 	
A_Project (2) R Transformations Test Cases		#	Project Name	Subject Hierarchy	Map Name	Lock Status		Locked Date	Mapping State	Mapping Descriptior	AdventureWorks AdventureWorks AMERISURE Atlas Sales System	
 Mappings L_Name (0) 		1	A_Project		A_Map	a			In Progress		BI BO Reports	
 P_Name (0) S_Name (0) 		2	A_Project		I_Map	a	Administrator	10/29/2019 18:55:	21 In Progress		 Customer Order Entry Data Lake 	/

3. In the Metadata Catalogue pane, right-click a table and hover over Preview Data.

Pro	ject Doc	ument	s I	Project Users	Extend	led Properties	Colla 🕨	Metado	ıta C	atalogue	୍	•
		1					× ب ()	▶ [_	data d Party Flat Files System		
	Lock Status	Locke	ed By	Locked Date	N	Napping State	Mapping Descriptior			A_Environment	IALOG_F	_
						Column (•	dbo.CAT_D	ABS	1
	6		Co Pre	eview 100 Records		Ca Preview D			•	dbo.CAT_T		
		Admi	Co Pre	eview 1000 Record		Lineage / Generate	e DDL p Analysis Gap Analysis ed Business Prop	perties	•	dbo.CAT_TE dbo.CAT_TE dbo.CATFX dbo.CATFX dbo.CATFX dbo.CATFX dbo.CATFX dbo.CATFX dbo.CATFX	EMPLATE: _CAT_CO _DIALOG _PROFILE _SCRIPT _WORKFI	S D S_ E_ L(

4. Click any one of the following:

Preview 100 Records

Click this option to preview the first 100 records.

Preview 1000 Records

Click this option to preview the first 1000 records.

Advanced Preview

Click this option to preview data based on a SQL query.

For example, if you click **Preview 100 Records**, then the User Credentials page appears.

🔲 User Credent	ials		_ 🗆 ×
Note:Validate Use	er credentials to proceed	→	×
User Name* :			
Password* :			

5. Enter User Name and Password to connect with the database.

You can preview the data based on the options you selected.

			Preview D	lata		
y	stem Name:A_System	ı				
Ξn	vironment Name:A_E	Invironment				
Tal	ble Name:dbo.CAT_D	IALOG_TAB				
#	CAT_DIALOG_TAB_ID	CAT_DIALOG_PROFILE_ID	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROPERTIES	CREATED_BY	CREATED_DATE_TIME
1	1	1	DefaultTab		Administrator	2018-09-14 10:39:46.02
2	2	2	DefaultTab		Administrator	2018-09-14 10:39:46.02
3	3	3	DefaultTab		Administrator	2018-09-14 10:39:46.02
4	4	4	DefaultTab		Administrator	2018-09-14 10:39:46.02
5	5	5	DefaultTab		Administrator	2018-09-14 10:39:46.023
6	6	6	DefaultTab		Administrator	2018-09-14 10:39:46.023
7	7	7	DefaultTab		Administrator	2018-09-14 10:39:46.027
8	8	8	DefaultTab		Administrator	2018-09-14 10:39:46.027
9	9	9	DefaultTab		Administrator	2018-09-14 10:39:46.027
10	10	10	DefaultTab		Administrator	2018-09-14 10:39:46.027
11	11	11	DefaultTab		Administrator	2018-09-14 10:39:46.03
12	12	12	DefaultTab		Administrator	2018-09-14 10:39:46.03
13	13	13	DefaultTab		Administrator	2018-09-14 10:39:46.03
14	14	14	DefaultTab		Administrator	2018-09-14 10:39:46.03
15	15	15	DefaultTab		Administrator	2018-09-14 10:39:46.03
16	16	16	DefaultTab		Administrator	2018-09-14 10:39:46.03
17	17	17	DefaultTab		Administrator	2018-09-14 10:39:46.033
18	18	18	DefaultTab		Administrator	2018-09-14 10:39:46.4
19	19	19	DefaultTab		Administrator	2018-09-14 10:39:46.423

Note: If you use Advanced Preview then you need to enter a SQL query in the space provided and click **(D)** to preview the data.

			Preview D	ata			
/s	tem Name:A_System	n					
nv	ironment Name:A_E	Environment					
	CAT_DIALOG_TAB_ID	CAT_DIALOG_PROFILE_ID	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROPERTIES	CREATED_BY	CREATED_DATE_TIME	1
	1	1	DefaultTab		Administrator	2018-09-14 10:39:46.02	t
	2	2	DefaultTab		Administrator	2018-09-14 10:39:46.02	t
	3	3	DefaultTab		Administrator	2018-09-14 10:39:46.02	T
	4	4	DefaultTab		Administrator	2018-09-14 10:39:46.02	T
	5	5	DefaultTab		Administrator	2018-09-14 10:39:46.023	T
	6	6	DefaultTab		Administrator	2018-09-14 10:39:46.023	T
	7	7	DefaultTab		Administrator	2018-09-14 10:39:46.027	T
	8	8	DefaultTab		Administrator	2018-09-14 10:39:46.027	T
	9	9	DefaultTab		Administrator	2018-09-14 10:39:46.027	T
)	10	10	DefaultTab		Administrator	2018-09-14 10:39:46.027	Т
T	11	11	DefaultTab		Administrator	2018-09-14 10:39:46.03	T
	12	12	DefaultTab		Administrator	2018-09-14 10:39:46.03	T
	13	13	DefaultTab		Administrator	2018-09-14 10:39:46.03	T
			.				1

Performing Table Gap Analysis

You can perform a table gap analysis and find:

- Tables not being used in mappings
- Tables existing on mapping without valid source or target

You can perform table gap analysis at the following levels:

- System
- Environment
- Table

To perform table gap analysis, follow these steps:

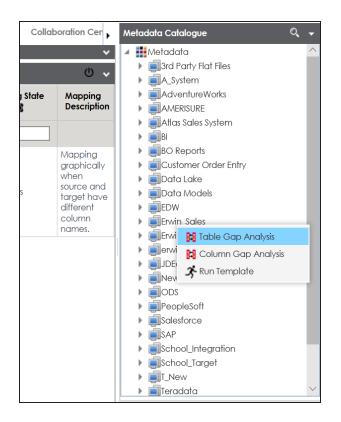
- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the **Workspace Mappings** pane, click a project.

The Metadata Catalogue pane appears on the right.

Workspace Mappings	•	۸ ۱	Napping Sum	nmary	Project Details	Project Do	cuments	Project Users I	extended Properties	^{Colla} ▶	Metadata Catalogue	୍
🔺 🕺 Mappings		Map	ping Search							~	🔺 🏭 Metadata	
ransformations		Map	ping Details							U v	 A_System 	
A_Project (2) Transformations Test Cases		#	Project Name	Subject Hierarchy	Map Name	Lock Statu	/	Locked Date	Mapping State	Mapping Descriptior	AdventureWorks AdventureWorks AMERISURE Atlas Sales System	
 Mappings L_Name (0) L P_Name (0) L S_Name (0) L S_Name (0) 			A_Project A_Project		A_Map	 	Administrator	10/29/2019 18:55:2	In Progress 21 In Progress		 BI BO Reports Customer Order Entry Data Lake 	γ

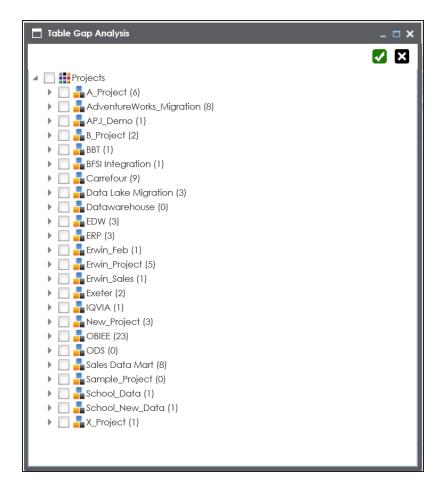
- 3. In the Metadata Catalogue pane, you can right-click a:
 - System: Use this option to run the analysis on all the tables under a system.
 - Environment: Use this option to run the analysis on all the tables under an environment.
 - Table: Use this option to run the analysis on a table.

For example, the following image displays the available options when you right-click a system.



4. Click Table Gap Analysis.

The Table Gap Analysis page appears.



- 5. Select projects and mappings.
- 6. Click 🔽.

The Table Gap Analysis Report for the selected projects and mappings appears.

Table	Gap Analysis					-
						Export: 🕥 🔂 🐿 🖷
Develo	pment Team					
	-		T-11- C A-	- Justa Dan aut		
Table	Can Analysis Pasult Fr	or PROJECT(S) : AdventureWe		nalysis Report		
	es not being used on any		orks_wigration			
#	System Name		Environment Name	e	Table Name	
1	Erwin_Sales		Integration		dbo.RM_RESOURCE	
2	Erwin_Sales		Integration_Target		dbo.RM_RESOURCE	
3	Erwin_Sales		N_Environment		dbo.RM_PROJECT	
4	Erwin_Sales		N_Environment		dbo.RM_RESOURCE	
Table	es existing on Mapping v	vithout valid Source (or) Target				
#	System Name	System Env Name	Table Name	Project Name	Map Name	Usage
			No Recor	rds Found		

Performing Column Gap Analysis

A column gap analysis enables you to find:

- Columns not existing in mappings
- Source columns existing on mappings without valid target
- Target columns listed on mappings without business rule and source column

You can perform column gap analysis at the following levels:

- System
- Environment
- Table

To perform column gap analysis, follow these steps:

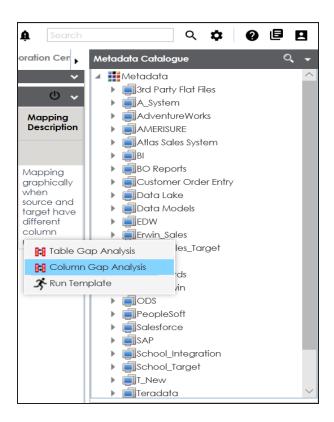
- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, click a project.

The Metadata Catalogue pane appears on the right.

Workspace Mappings	•	۸ ۱	Napping Surr	n mary Pro	ject Details	Project Doc	uments	Project Users E	Extended Properties	Colla 🖡	Metadata Catalogue	O,
🔺 👬 Mappings	^	Map	ping Search							*	🔺 🏭 Metadata	
rransformations		Map	ping Details							U v	 If an array of the second secon	
A_Project (2)		#	Project Name	Subject Hierarchy	Map Name	Lock Status	Locked By	Locked Date	Mapping State	Mapping Descriptior	AdventureWorks AMERISURE Atlas Sales System	
🗞 Test Cases) 📑 Mappings											▶ ∎BI	
) 🗾 L_Name (0)		1	A_Project		A_Map	a			In Progress		BO Reports	
 F_Name (0) S_Name (0) 		2	A_Project		I_Map	ê	Administrator	10/29/2019 18:55:2	21 In Progress		 Customer Order Entr Data Lake 	у

- 3. In the Metadata Catalogue pane, you can right-click a:
 - System: Use this option to run the analysis on all the columns under a system.
 - Environment: Use this option to run the analysis on all the columns under an environment.
 - Table: Use this option to run the analysis on all the columns under a table.

For example, the following image displays the available options when you click a system.



4. Click Column Gap Analysis.

The Column Gap Analysis page appears.

Column Gap Analysis	_ 🗆 ×
	X X
Projects	
A_Project (6)	
🕨 🔲 📕 AdventureWorks_Migration (8)	
APJ_Demo (1)	
🕨 🔲 🌄 B_Project (2)	
🕨 🔲 🏪 BBT (1)	
🕨 🔲 📲 BFSI Integration (1)	
🕨 🔲 📲 Carrefour (9)	
🕨 🔲 量 Data Lake Migration (3)	
🕨 🔲 量 Datawarehouse (0)	
🕨 📃 📲 EDW (3)	
🕨 🔲 📲 ERP (3)	
🕨 📄 📲 Erwin_Feb (1)	
🕨 🔲 📲 Erwin_Project (5)	
🕨 🔲 📲 Erwin_Sales (1)	
🕨 🔲 📲 Exeter (2)	
🕨 📃 📲 IQVIA (1)	
🕨 🔲 📲 New_Project (3)	
DBIEE (23)	
🕨 📃 📲 ODS (0)	
🕨 📃 📲 Sales Data Mart (8)	
🕨 📄 📲 Sample_Project (0)	
🕨 🔲 📲 School_Data (1)	
🕨 📄 📲 School_New_Data (1)	
🕨 🔲 📲 X_Project (1)	
L	

- 5. Select projects and mappings.
- 6. Click 🗸.

The Column Gap Analysis Report for the selected projects and mappings appears.

			Column Gap Ana	Inch Demonst		
			•	lysis Report		
		esult For PROJECT(S) : Erv	vin_Sales			
	mns not existing on					
	System Name	Environment Name	Table Name		Column Name	
	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCEID	
	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCENAME	
	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCEDESC	
	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCECELLPHONE	
	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCEHOMEPHONE	
	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCEEMAIL	
	Erwin_Sales	N_Environment	dbo.RM_PROJECT		PROJECTID	
	Erwin_Sales	N_Environment	dbo.RM_PROJECT		RESOURCEID	
	Erwin_Sales	N_Environment	dbo.RM_PROJECT		PROJECTNAME	
0	Erwin_Sales	N_Environment	dbo.RM_PROJECT		PROJECTDESC	
1	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCE_ID	
2	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCENAME	
3	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCEDESC	
1	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCECELLPHONE	
5	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCEHOMEPHONE	
5	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCEEMAIL	
	Source Columns	existing on Mapping withou	t valid Target (with or without BR)	(or) Target Columns liste	d on Mapping without BR (With	out Source Col)
#	System Name E	nvironment Table Name	Column Name	Project Name	Map Name	Usage

Running Impact Analysis

A technical asset may act as a source, target, or both in mappings. You can run impact analysis on a table or column using the Mapping Specification grid. The impact analysis displays the impact of the table or column as source or target. It includes information about indirect impact (upstream and downstream) and impacts of the table or column on business rules, source extract SQL, and lookups.

To run impact analysis, follow these steps:

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

The Mapping Specification grid appears.

Workspace Mappings 🔹 👻		Mapping Specifico	tion Graph	nical Designer	Test Specification	Workflow Lo	g	•
Mappings A Transformations	8	APPEND 077	🌏 [Integration	1]	Profi	les: Default	Ţ Į	: 🗟 👫 🗟 🖬 🖬 🐼 < 🖸
 Projects Data Lake Migration (3) EDW (3) 	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
 ERP (3) Ervin_Project (5) Ervin_Sales (1) Transformations Test Cases Mappings 	1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEID	int	4	FLOOR
	2	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCENAME	varchar	100	REVERSE
 New_Project (3) OBIEE (23) 	3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	

- 3. Select a row.
- 4. Right-click a table or column.

For example, the following image displays the options available when you right-click a table.

		🛛 💞 [Integratio	on]	Profiles:	Default	- 🌣 🕻	, 👫 🖻 🖬 📾 😣 < 🛛
ŧ	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	Erwin_Sales	Integration	dbo.RM_RESOU	IRC RESOURCEID	int	4	FLOOR
2	Erwin_Sales	Integration	-	IRC RESOLIRCENAME Check All Rows	varebar	100	REVERSE
3	Erwin_Sales	Integration	dbo.RM_RE	Uncheck All Rows Clear Source Details Clear Target Details		150	dbo.RM_Resource
4	Erwin_Sales	Integration	dbo.RM_RE	Clear Source & Targ Clear Cell Delete Row(s)	et Details	15	ISNULL
		I< <	Records from) Impact Analysis Rep) Lineage Analyzer	ort 🕨	C Default Search	

5. Hover over Impact Analysis Report.

The available options appear.

6. Use the following options:

Default Search

Use this option to view the default report. The default report includes all the mappings in the impact analysis.

Advanced Search

Use this option to customize the impact analysis report by including the required mappings.

For example, if you click Advance Search, then the Impact Analysis Report page appears.

Impact Analysis Report	_ D :
Impact An	alysis Report
Load Passive Mappings Load All Mappings Active Mappings Acroscet (6) Acroscet (7) Active Mappings Active Mappings	Impact Analysis Criteria System Name : Environment Name : Integration Table Name : Impact Analysis Usage In Source In Target In Trans Lookup Condition & Lookup Column In Business Rule In Source Extract Sql

You can use the following options to select the required mappings:

- Load Passive Mappings/Load Active Mappings: Use this option to load passive or active mappings.
- Load All Mappings: Use this option to load all the mappings.

Select the mappings to include them in the impact analysis and click \checkmark .

For example, the following image displays the Impact Analysis Report, if you click the Default Search.

By default, the Direct Impact tab opens. It displays the impact of the technical asset as a source and as a target.

	dbo.RM_RESOURCE							
abl	eName: dbo.RM_RESOURC	E					2	1
umr	nary - Direct Impact	< Su	mmary - Indirect Impact		<	Audit Information		
			4		Upstream Impact	Audit	Information	
			4		Downstream Impact	Created By	Administrator	
		As Source	3		In Business Rule	Created Time	01/10/2020 18:28:16	
		As Target	2	1 1	In Source Extract SQL	Modified By	Administrator	
					In Lookups	Modified Time	01/10/2020 18:28:16	
	,		Indirect Im	act	In Lookups	<		>
1						×		/
	Direct Impact Indi	irect Impact Other Impac	:15					
s Sc	urce							
#	Project Name	Mapping Name	Target Information				Business Rule	
			Table	Environment	System			
1	ERP	Integration	dbo.RM_RESOURCE_New	Integration_Target	Erwin_Sales_Target			
2	Erwin_Project	Integration	dbo.RM RESOURCE New	Integration_Target	Erwin_Sales_Target			
3	Erwin_Project	Integration	dbo.RM_RESOURCE_New	Integration_Target	Erwin_Sales_Target		FLOOR	
				· · ·				
ls To	rget							
#	Project Name	Mapping Name	Source Information				Business Rule	
			Table	Environment	System			
1	Erwin_Feb	Integration_Feb	dbo.ADS_ASSOCIATIONS	Data_Migration	erwinDIS			
				-				

To view the indirect impact, click the **Indirect** tab.

It displays the upstream and downstream impact of the technical asset.

m	mary - Direct Impact	۶ >	ummary - Indirect Impact		<	Audit Information	
			4	Up	stream Impact	Audit	Information
			4		wnstream Impact	Created By	Administrator
		As Source	2	In 8	lusiness Rule	Created Time	01/10/2020 18:28:16
		As Target			iource Extract SQL	Modified By Modified Time	Administrator 01/10/2020 18:28:16
	9		Indirect Imp		ookups	1	
ī	Direct Impact Indi	ect Impact Other Imp					
pst	ream Impact						
#	Project Name	Mapping Name	Source Table	Source Environment/System	Target Table	Target Envir	onment/System
	ERP	Integration	dbo.RM_RESOURCE dbo.RM_RESOURCE	Integration Integration/Erwin_Sales Erwin_Sales	dbo.RM_RESOURCE_I	New Integration_T	arget/Erwin_Sales_Target
	Erwin_Project	Integration	dbo.RM_RESOURCE	Integration/Erwin_Sales	dbo.RM_RESOURCE_I	New Integration_T	arget/Erwin_Sales_Target
3	ERP	Integration	dbo.RM RESOURCE	Integration/Erwin_Sales	dbo.RM RESOURCE I	New Integration_1	arget/Erwin_Sales_Target
	Envin Salar	Integration	dha PM RESOLIRCE	Integration/Envir Salar	dho PM PESOUPOE I	New Integration T	araot/Envin Salor Taraot
Dow	nstream Impact						
	Project Name	Mapping Name	Source Table	Source Environment/System	Target Table	Target Er	vironment/System
#		Integration Feb	dbo.ADS ASSOCIATIONS	Data Migration/erwinDIS	dbo.RM RESOURCE	r Internette	n/Erwin Sales

To view other impacts, click the **Other Impacts** tab.

It displays the impact of the technical asset on:

- Business rules
- Source Extract SQL
- Lookups

	dbo.RM_RESO	URCE									
abl	leName: dbo.RM_RES	SOURCE								1	1
ımn	mary - Direct Impact		< Su	ummary - Indirec	t Impact				Audit Information		
								Upstream Impact	Audit	Information	
			As Source	4				Downstream Impac	t Created By	Administrator	
	N		As Target	2	1	1 1	1	📒 In Business Rule	Created Time	01/10/2020 18:28:16	
			/ u laigui					In Source Extract SG	L Modified By	Administrator	
		9			Indire	ct Impact		n Lookups	Modified Time	01/10/2020 18:28:16	
	Direct Impact	Indirect Impact	Other Impa	cts							
Bu	siness Rules										
	Project Name	Mapping Name	Source Sys	stem	Source Env	ironment	Source Ta	ble	Business Rule	Extended Business Rule	
	Erwin_Sales	Integration	Erwin_Sales		Integration		dbo.RM_RE	SOURCE	lbo.RM_Resource		
											>
So	ource Extract SQL										
ŧ	Project Name		Mapping Na	me	Source	ce Extract SQL					
	Erwin_Sales		Integration		Select	* from dbo.RM	RESOURCE				
Lo	okups										
,	Project Name	Mapping Name	Source Syst	lem	Source Envir	onment	Source Tabl	e Lo	okup Condition	Lookup On	Lo
								RE	ECT RESOURCEID, GOURCENAME, GOURCEDESC, GOURCECELLPHONE,		

To export the report in the XLSX format, click $^{\textcircled{M}}$.

To export the report in the PDF format, click ${\ensuremath{\overline{ extsf{D}}}}$.

Running Lineage Analysis

After mapping source metadata with target metadata, you can run the lineage analyzer on the mapping through the Mapping Specification grid. The generated data lineage report helps you trace the data's origin, its transformations, and its destination after source to target mappings.

You can run the lineage at the following levels:

- System
- Environment
- Table
- Column

System

You can run forward and reverse lineage analysis to trace metadata at the system level. Forward lineage analysis generates lineage with the system as source. And, reverse lineage analysis generates lineage with the system as target. The Dual-Combined View lineage analysis generates a lineage, which includes both forward and reverse lineage.

Viewing Lineage

To run lineage analyzer at the system level, follow these steps:

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

The Mapping Specification grid appears.

•	Mapping Specifico	tion Graph	ical Designer	Test Specification	Workflow Lo	g		•		
20	I 🔯 🗏 🍣 (D	ata Integration]		Profiles:		▲ Ô	🔽 🕸 💫 👯 🛛 < 🗷			
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	T S		
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	•		
2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	nvarchar	40	0			
3	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	n∨archar	30	0			
4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	n∨archar	30	0			

- 3. Select a row.
- 4. Right-click a system and hover over Lineage Analyzer.

The options available for Lineage Analyzer appear.

#	Target Sy Name	System Target Environment Name			get Table me	Target Column Name	Target Column Data Type
1	SQLTechPubs		SQLTechPubs	dbo.Customers		CustomerID	nchar
2	SQLTechF		SQLTechPubs	dbo	.Customers	CompanyName	n∨archar
3	SQLTech	Background Color		•	Customers	ContactName	n∨archar
4	SQLTech	Line	ar Formatting eage Analyzer	•	Customers	ContactTitle	nvarchar •
5	SQLTech	Exte	ended Properties Ire Link		📊 Reverse 📊 Dual - C	Combined View	archar

- 5. Hover over any one of the following:
 - Forward: Use this option to view forward lineage.
 - **Reverse**: Use this option to view reverse lineage.
 - Dual Combined View: Use this option to view combined forward and reverse lineage.

For example, when you hover over Forward, All Projects and By Project appear as options.

#	Target System Target Name Environment Name		Environment	Target Table Name		Target Column Name	Target Column Data Type	Targ Leng
1	SQLTec	hPubs	SQLTechPubs c		oo.Customers	CustomerID	nchar	5
2	SQLTec	hPubs	SQLTechPubs Color	dk	oo.Customers	CompanyName	nvarchar	40
3	SQLTec	A Font Styles		•	o.Customers	ContactName	n∨archar	30
4	SQLTec	Clea	r Formatting age Analyzer aded Properties	•	Forward	ContactTitle	pyarchar	30
5	SQLTec				📊 Reverse 📊 Dual - Ca	mbined View	By Project varchar	60

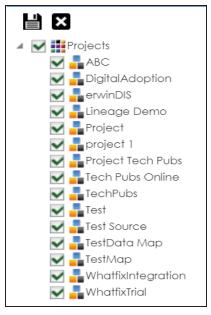
6. Use the following options:

All Projects

Use this option to include all the projects in lineage analysis.

By Project

Use this option to select projects for lineage analysis.



By default, all projects are selected. Clear the check boxes for the projects that are not required. Then, click

The system's lineage is generated based on the options you selected.

Lineage	For : SQLTechPubs			
	C SQLTechPubs	🖵 Oracle	Salesforce	
		V	•	•

Working on Lineage

Lineage of a system shows how metadata moves through systems. It provides a summary of environments used as source and target. Also, it gives you information about the systems and environments involved in the lineage.

For example, the following image displays a system's lineage.

Lineage For : SQLTechPubs	Overview Lineage) 🔀 🛛 🖊 🖾
	System Details	
	Property	Value
	System Name	SQLTechPubs
	Primary Move Type	Both
	Business Purpose	It contains sales source
	Data Steward	It contains sales source
	LTechPubs inSales	Ű
	TechPubs Environment Details	
x x	▼ # Environme	nt
	1 erwinSa	es
	2 SQLTect	Pubs
	Extended Properties	
(Summary	

Use the following options:

Overview Lineage (

Use this option to switch between detailed and overview lineage view.

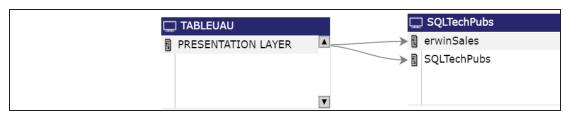
Detailed lineage view: This view is helpful to technical users like ETL developers. When you reverse engineer ETL jobs or SQL scripts, the lineage might contain temporary tables, ETL components (filters, joiners, routers etc.). This view includes systems and environments, that do not exist in the Metadata Manager.

For example, the following lineage displays the erwinDOC system and erwinDOC environment. These do not exist in the Metadata Manager.



Overview lineage view: This view is helpful to business users. It excludes systems and environments that do not exist in the Metadata Manager.

For example, the following lineage does not display erwinDOC system and erwinDOC environment. These do not exist in the Metadata Manager.



Collapse/Expand ()

Use this option to switch between collapsed and expanded view. The expanded view includes environments involved in the lineage and the collapsed view excludes environments in the lineage.

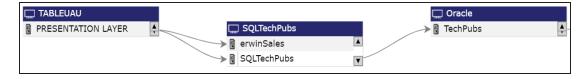
For example, in the following lineage the collapsed view does not display environments involved in the lineage.



Auto Expand/Autofit (23)

This switch is enabled when you use the expanded view (). Use this option to switch between the Auto Expand view and Auto Fit view. The Auto Expand view shrinks the space for the list of environments and the Autofit view expands the space to fit the list of environments.

For example, the following lineage displays the Auto Expand view.



Export to Image (🖾)

Use this option to download the lineage in the JPG format.

Export to PDF (

Use this option to download the lineage in the PDF format.

Export to Excel

Use this option to download the lineage in the XLSX format.

Highlighting Lineage Path of an Environment

To highlight an environment's lineage path, click the environment. The environment is highlighted in orange color, its forward lineage path appears in red, and its reverse lineage path appears in blue.

_	🖵 erwinDoc	🛄 TABLEUAU		SQLTechPubs	Coracle
	erwinDOC			SQLTechPubs	
		Y	V		

Systems that are not part of a lineage path disappear. For example, in the following lineage, the Oracle system disappears in the lineage path with respect to the erwinSales environment.

C erwinDoc	TABLEUAU	SQLTechPubs	▲ → B TechPubs	
	Y	V	Y	V

System Details

By default, this pane displays properties of a system for which, you ran lineage analysis. You can click a system in the lineage to view its properties in this pane.

Environment Details

By default, this pane displays a list of environments under the system for which, you ran lineage analysis.

You can click a system in the lineage to view list of environments under the system. You can then click <Environment_Name> to view lineage of the environment.

Note: Environments that are not involved in lineage, are not included in the list.

Extended Properties

By default, this pane displays the extended properties of a system for which, you ran lineage analysis. You can click a system in the lineage to view its extended properties in this pane.

For more information, on configuring extended properties of a system, refer to the Extending System Properties topic.

Summary

This pane displays a summary of the lineage report. It gives information about number of environments acting as source, target, or both in the lineage.

Environment

You can run forward and reverse lineage analysis to trace metadata at the environment level. Forward lineage analysis generates lineage with the environment as source. And, reverse lineage analysis generates lineage with the environment as target. The Dual-Combined View lineage analysis generates a lineage, which includes both forward and reverse lineage.

Viewing Lineage

To run lineage analyzer at the environment level, follow these steps:

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

The Mapping Specification grid appears.

_ ۱	Mapping Specification		ohical Designer	Test Specification	Workflow Lo	g	
20	🚀 💷 🔯 🔳 🍣 [erwinSales]		on]	Profiles:		■ Qi	ra 👯 🔊 < 🖪
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision
1	Oracle	TechPubs	APPQOSSYS.WLM_	OPER	NUMBER		
2	Oracle	TechPubs	APPQOSSYS.WLM_	NCLSRS	NUMBER		
3	Oracle	TechPubs	APPQOSSYS.WLM_	CLPCSTR	VARCHAR2	4000	
4	Oracle	TechPubs	APPQOSSYS.WLM_	ACTIVE	CHAR	1	
5	Oracle	TechPubs	APPQOSSYS.WLM_	SEQNO	NUMBER		
•							Þ

- 3. Select a row.
- 4. Right-click an environment and hover over Lineage Analyzer.

The options available for Lineage Analyzer appear.

۰	Mapping Specifico	ation	Graph	ical Designer	Test	Specification	Workflow Lo	ow Log	
20	🗉 🔯 🔳 🍣 [ei	rwinSalesIn	Integration]			Profiles:		Ţ Ţ	
#	Target System Name	Target Environm Name	nent	Target Table ent Name		jet Column ne	Target Column Data Type	Target Column Length	
1	Oracle	TechPubs		APPQOSSYS.WLM_	OPER	2	NUMBER		
2	Oracle	TechPubs		APPQOSSYS.WLM_ ht Color	NCLS	RS	NUMBER		
3	Oracle	TechPubs		nt Styles ckground Color nt Size	•	STR	VARCHAR2	4000	
4	Oracle	TechPubs	Line	ear Formatting eage Analyzer ended Properties	•	Forward		•	
5	Oracle	TechPubs		are Link		📊 Reverse	e Combined View	•	

- 5. Hover over any one of the following:
 - Forward: Use this option to view forward lineage.
 - **Reverse**: Use this option to view reverse lineage.
 - Dual Combined View: Use this option to view combined forward and reverse lineage.

For example, when you hover over Reverse, All Projects and By Project appear as options.

#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision
1	Oracle	TechPubs	APPQOSSYS.WLM_	OPER	NUMBER		
2	Oracle		APPOOSSYS WIM	NOL SRS	NUMBER		
3	Oracle	TechPubs	ont Styles ackground Color ont Size) STR	VARCHAR2	4000	
4	Oracle	TechPubs	Clear Formatting ineage Analyzer ixtended Properties	Forwar			ota
5	Oracle		hare Link APPQOSSYS.WLM_	Dual -	Combined View	All proje	

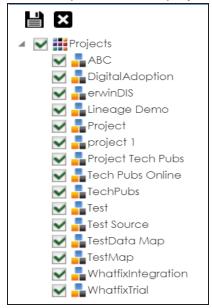
6. Use the following options:

All Projects

Use this option to include all the projects in lineage analysis.

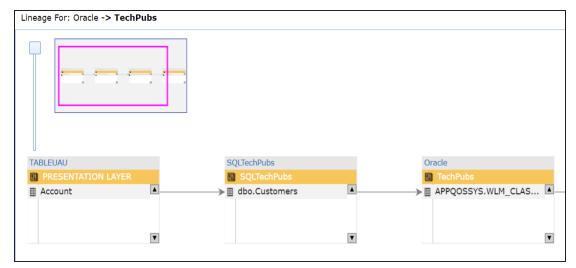
By Project

Use this option to select projects for lineage analysis.



By default, all projects are selected. Clear the check boxes for the projects that are not required. Then, click

The environment's lineage is generated based on the options you selected.



Working on Lineage

Lineage of an environment shows how metadata moves through environments. It provides a summary of tables used as source and target. Also, it gives information about the environments and tables involved in the lineage.

For example, the following image displays an environment's lineage.

Lineage For: SQLTechPubs -> SQLTechPub	s			Overview	Lineage	X 🛛 🔺	×
					Environment Details		
					Property	Value	
					System Name	SQLTechPubs	
					Environment Name	SQLTechPubs	
					Environment Type	SqlServer	
					Indended Use Descriptio	n	
erwinDoc	TABLEUAU	SQLTech	Juba	Oracle			
erwinDoc				Techi			elf Hel
E CustDetails	→ III Account	▲ dbo.C					Self
		→ III dbo.C	Customers		Table Details		
_		T	T		# Table Name		
T							
					1 dbo.Catego	ries	
					2 dbo.Custom		
							*
					Extended Properties		-
•				•	Summary		

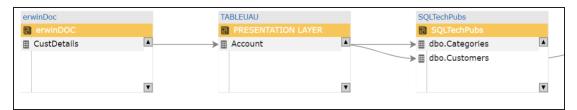
Use the following options:

Overview Lineage (

Use this option to switch between detailed and overview lineage view.

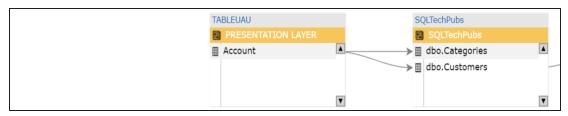
Detailed lineage view: This view is helpful to technical users like ETL developers. When you reverse engineer ETL jobs or SQL scripts, the lineage might contain temporary tables, ETL components (filters, joiners, routers etc.). This view includes environments and tables that do not exist in Metadata Manager.

For example, the following lineage displays the erwinDOC environment and CustDetails table. These, do not exist in the Metadata Manager.



Overview lineage view: This view is helpful to business users. It excludes environments and tables that do not exist in the Metadata Manager.

For example, the following lineage does not display erwinDOC environment and CustDetails table. These, do not exist in the Metadata Manager.



Collapse/Expand ()

Use this option to switch between collapsed and expanded view. The expanded view includes tables involved in the lineage and the collapsed view excludes tables in the lineage.

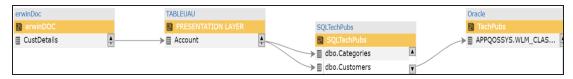
For example, in the following lineage the collapsed view does not display tables involved in the lineage.

erwinDoc	TABLEUAU	SQLTechPubs	Oracle
erwinDOC	PRESENTATION LAYER	SQLTechPubs	TechPubs

Auto Expand/Autofit (23)

This switch is enabled when you use the expanded view (). Use this option to switch between the Auto Expand view and Auto Fit view. The Auto Expand view shrinks the space for the list of tables and the Autofit view expands the space to fit the list of tables.

For example, the following lineage displays the Auto Expand view.



Export to Image (🖾)

Use this option to download the lineage in the JPG format.

Export to PDF (

Use this option to download the lineage in the PDF format.

Export to Excel

Use this option to download the lineage in the XLSX format.

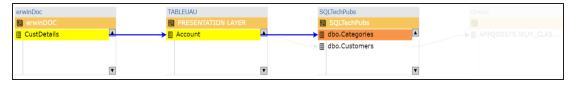
Highlighting Lineage Path of a Table

To highlight a table's lineage path, click the table. The table is highlighted in orange color, its forward lineage path appears in red, and its reverse lineage path appears in blue.

en	winDoc	Т	ABLEUAU	5	SQLTechPubs		Oracle
			PRESENTATION LAYER		SQLTechPubs		TechPubs
	CustDetails	> <mark></mark>	Account		dbo.Categories	\rightarrow	APPQOSSYS.WLM_CLAS
					dbo.Customers		
	T		V				

Environments that are not part of a lineage path disappear.

For example, in the following lineage, the TechPubs environment disappears in the lineage path with respect to the dbo.Categories table.



Environment Details

By default, this pane displays properties of an environment for which, you ran lineage analysis. You can click an environment in the lineage to view its properties in this pane.

Table Details

By default, this pane displays a list of tables under the environment for which, you ran lineage analysis.

You can click an environment in the lineage to view list of tables under the environment. You can then click <Table_Name> to view lineage of the table.

Note: Tables that are not involved in lineage, are not included in the list.

Extended Properties

By default, this pane displays the extended properties of an environment for which, you ran lineage analysis. You can click an environment in the lineage to view its extended properties in this pane.

For more information, on configuring extended properties of an environment, refer to the Extending Environment Properties topic.

Summary

This pane displays a summary of the lineage report. It gives information about number of tables acting as source, target, or both in the lineage.

Table

You can run forward and reverse lineage analysis to trace metadata at the table level. Forward lineage analysis generates lineage with the table as source. And, reverse lineage analysis generates lineage with the table as target. The Dual-Combined View lineage analysis generates a lineage, which includes both forward and reverse lineage.

Viewing Lineage

To run lineage analyzer at the table level, follow these steps:

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

The Mapping Specification grid appears.

•	Mapping Specifico	tion Graph	ical Designer	Test Specification	Workflow Log			
	🗉 🔯 🔳 🍣 (De	ata Integration]		Profiles:		- Ô	G, 👫 🗐 < 🛛	2
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	T S
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	•
2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	nvarchar	40	0	
3	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	n∨archar	30	0	
4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	n∨archar	30	0	

- 3. Select a row.
- 4. Right-click a table and hover over Lineage Analyzer.

The options available for Lineage Analyzer appear.

#	Target System Name	Target Environment Name	Targ Nam	et Table ne	Target Column Name	Target Co Data Type		Target Column Length	Target Column Precision	T S
1	SQLTechPubs	SQLTechPubs	dbo.(Customers	CustomerID : All Rows	nchar		5	0	•
2	SQLTechPubs	SQLTechPubs	dbo.	abo. Clear Source Details				40	0	
3	SQLTechPubs	SQLTechPubs	dbo.	Clear Source & Target Details				30	0	
4	SQLTechPubs	SQLTechPubs	dbo.	Lineag	t Analysis Report ge Analyzer led Properties	•		prward everse	•	
5	SQLTechPubs	SQLTechPubs	dbo	• 🗗 Share I				ual - Combined Vie		

- 5. Hover over any of the following:
 - Forward: Use this option to view forward lineage.
 - **Reverse**: Use this option to view reverse lineage.
 - Dual Combined View: Use this option to view combined forward and reverse lineage.

For example, when you hover over Reverse, All Projects and By Project appear as options.

#	Target System Name	Target Environment Name		rget Table Ime	Target Column Name	Target C Data Typ		Target Column Length	Target Column Precision		Target Column Scale
1	SQLTechPubs	SQLTechPubs	dbo	Customers Check A		nchar		5	0		0
2	SQLTechPubs	SQLTechPubs	dbo	🙀 Uncheck All Rows 💕 Clear Source Details 💕 Clear Target Details				40	0		0
3	SQLTechPubs	SQLTechPubs	dbo	 Clear Source & Target Details Clear Cell Delete Row(s) 				30	0		0
4	SQLTechPubs	SQLTechPubs	dba			•	For		,		0
5	SQLTechPubs	SQLTechPubs	dbo	Share Lir		nvarchar	Rev Due	verse al - Combined Viev	• ~ •	📊 All p	

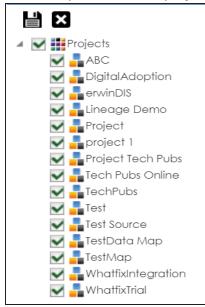
6. Use the following options:

All Projects

Use this option to include all the projects in lineage analysis.

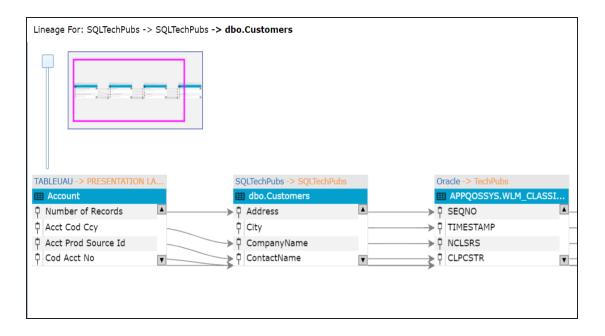
By Project

Use this option to select projects for lineage analysis.



By default, all projects are selected. Clear the check boxes for the projects that are not required. Then, click

The table's lineage is generated based on the options you selected.



Working on Lineage

Lineage of a table shows how metadata moves through tables. It provides a summary of columns used as source and target. Also, it gives you information about the technical and business properties of columns involved in the lineage.

For example, the following image displays a table's lineage.

Lineage For: SQLTechPub	os -> SQLTechPubs	-> dbo.Customers					Overview	Lineage	• 🛑 🖪 🛛	2	×
								Summ	ary		•
								Colum	n Details		
								#	Column		
								1	Address		
								2	City		
erwinDoc -> erwinDOC		TABLEUAU -> PRESENTATION	NIA	SOLTE	echPubs -> SQLTechPubs		Oracle ->	3	CompanyName		9
CustDetails		Account			po.Customers			4	ContactName		Self Help
CustName	A	Number of Records	A		ldress	A		5	ContactTitle		Self
CustCity		Acct Cod Ccy		¢ Cit	ty		→ 🗘 TIME	6	CustomerID		Ű
		Acct Prod Source Id		→ † Co	mpanyName		→ ¢ NCLS	/	Region		
	V	Cod Acct No	V	¢ Co	ntactName	V	CLPC				
				<i>,</i>			, ,				
								Techni	cal		
								Busine	\$\$		•
•							۱.	Extend	led Properties		

Use the following options:

Overview Lineage (

Use this option to switch between detailed and overview lineage view.

Detailed lineage view: This view is helpful to technical users like ETL developers. When you reverse engineer ETL jobs or SQL scripts, the lineage might contain temporary tables, ETL components (filters, joiners, routers etc.). This view includes tables and columns that do not exist in the Metadata Manager.

For example, the following lineage displays the CustDetails table that does not exist in the Metadata Manager.

erwinDoc -> erwinDOC		TABLEUAU -> PRESENTATIO	DN LA	5	SQLTechPubs -> SQLT	echPubs	0	racle -> TechPubs	
III CustDetails		III Account		E	dbo.Customers			APPQOSSYS.W	LM_CLASSI
🖞 CustName		Number of Records	A		Address	A _		SEQNO	A
CustCity	\rightarrow	🖞 Acct Cod Ccy	_		City	_	> †	TIMESTAMP	
	\rightarrow	Acct Prod Source Id	_	\rightarrow	CompanyName	-	→ †	NCLSRS	
	V	🕆 Cod Acct No	V		ContactName	V	≥ Ŷ	CLPCSTR	V
				/					

Overview lineage view: This view is helpful to business users. It excludes tables and columns that do not exist in the Metadata Manager.

For example, the following lineage does not display CustDetails table that does not exist in the Metadata Manager.

TABLEUAU -> PRESENTATION LA	SQLTechPubs -> SQLTechPubs	Oracle -> TechPubs
III Account	III dbo.Customers	APPQOSSYS.WLM_CLASSI
🖣 Number of Records 🛛 🔺	Address	▲> 🖡 SEQNO 🔹 🔺
Acct Cod Ccy	0 City	TIMESTAMP
Acct Prod Source Id	→ 🖞 CompanyName	→ P NCLSRS
Cod Acct No	ContactName	

Collapse/Expand ()

Use this option to switch between collapsed and expanded view. The expanded view includes columns involved in the lineage and the collapsed view excludes columns in the lineage.

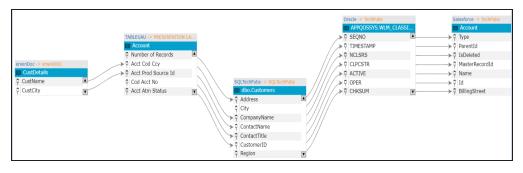
For example, in the following lineage the collapsed view does not display columns involved in the lineage.

erwinDoc -> erwinDOC	TABLEUAU -> PRESENTATION LA	SQLTechPubs -> SQLTechPubs	Oracle -> TechPubs
III CustDetails	III Account	🗰 dbo.Customers	APPQOSSYS.WLM_CLASSI

Auto Expand/Autofit (23)

This switch is enabled when you use the expanded view (). Use this option to switch between the Auto Expand view and Auto Fit view. The Auto Expand view shrinks the space for the list of columns and the Autofit view expands the space to fit the list of columns.

For example, the following lineage displays the Auto Expand view.



Export to Image (🖾)

Use this option to download the lineage in the JPG format.

Export to PDF (

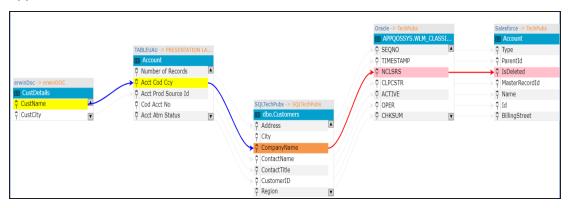
Use this option to download the lineage in the PDF format.

Export to Excel

Use this option to download the lineage in the XLSX format.

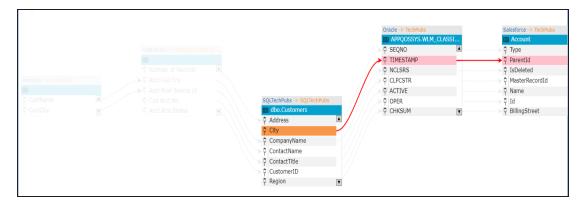
Highlighting Lineage Path of a Column

To highlight a column's lineage path, click the column. The column is highlighted in orange color, its forward lineage path appears in red, and its reverse lineage path appears in blue.



Tables that are not part of a lineage path disappear.

For example, in the following lineage, the CustDetails and Account table disappear in the lineage path with respect to the City column.



Summary

This pane displays a summary of the lineage report. It gives information about number of columns acting as source, target, or both in the lineage.

Column Details

By default, this pane displays a list of columns under the table for which, you ran lineage analysis.

You can click a table in the lineage to view list of columns under the table. You can then click <Column_Name> to view lineage of the column.

Note: Columns that are not involved in lineage, are not included in the list.

Technical

This pane displays technical properties of a table. By default, it displays the technical properties of the table for which, you ran lineage analysis. You can click a table in the lineage and view its technical properties. The technical properties of a table include System Name, Environment Name, Table Name, and so on. For more information on updating table properties, refer to the <u>Updating Table Properties</u> topic.

Business

This pane displays business properties of a table. By default, it displays the business properties of the table for which, you ran lineage analysis. You can click a table in the lineage and view its business properties. The business properties of a table include Logical Table Name, Table Definition, Expanded Logical Name, and so on. For more information on updating table properties, refer to the <u>Updating Table Properties</u> topic.

Extended Properties

By default, this pane displays the extended properties of a table for which, you ran the lineage analysis. You can click a table in the lineage to view its extended properties in this pane. For more information on configuring extended properties of tables, refer to the <u>Extending Table Properties</u> topic.

Column

You can run forward and reverse lineage analysis to trace metadata at the column level. Forward lineage analysis generates a lineage with the column as source. And, reverse lineage analysis generates a lineage with the column as target. The Dual-Combined View lineage analysis generates a lineage, which includes both forward and reverse lineage.

Viewing Lineage

To run lineage analyzer at the column level, follow these steps:

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

The Mapping Specification grid appears.

•	Mapping Specifico	tion Graph	ical Designer	Test Specification	Workflow Lo	g		×
20	I 🔯 🔳 🍣 (D	ata Integration]		Profiles:		▲ Ô	G, 👫 🗐 < 🛛	2
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	T S
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	•
2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	n∨archar	40	0	
3	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	nvarchar	30	0	
4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	nvarchar	30	0	

- 3. Select a row.
- 4. Right-click a column and hover over Lineage Analyzer.

The options available for Linear Analyzer appear.

	Mapping Specific	ation Grap	bhical Designer	Test Specificat	on Workflow Lo	g				
		🛛 🎅 [Data Inte	gration]		Profiles:			🗕 🗘 🛛	, 👯 🗟 🖬 🐻	
#	Target System Name			Target Colum Name	n Target Column Data Type			Target Column Precision	Target Column Scale	
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar heck All Rows	5	0)	0	
2	SQLTechPubs	SQLTechPubs	dbo.Customers	Compa 📝 C	The second secon			0	0	
3	SQLTechPubs	SQLTechPubs	dbo.Customers	Contac 📝 C	lear Source & Target (lear Cell elete Row(s)	Details	0)	0	
4	SQLTechPubs	SQLTechPubs	dbo.Customers	Contac	npact Analysis Report neage Analyzer tended Properties	•	_	orward	•	
5	SQLTechPubs	SQLTechPubs	dbo.Customers		nare Link			everse ual - Combined V	view •	

- 5. Hover over any one of the following:
 - Forward: Use this option to view forward lineage.
 - **Reverse**: Use this option to view reverse lineage.
 - Dual Combined View: Use this option to view forward and reverse lineage of the column combined together.
 - Dual Split View: Use this option to view combined forward and reverse lineage.

For example, when you hover over the Reverse, All Projects and By Project appear as options.

#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Co Length	lumn	Target Column Precision	Target Co Scale	olumn	Target Colu Nullable Flo
1	SQLTechPubs	SQLTechPubs	dbo.Customers		c All Rows	5		0	0		
2	SQLTechPubs	SQLTechPubs	dbo.Customers	Comp 📝 Clear	eck All Rows Source Details Target Details			0	0		
3	SQLTechPubs	SQLTechPubs	dbo.Customers	Clear Contc Clear Opelete		ətails		0	0		
4	SQLTechPubs	SQLTechPubs	dbo.Customers	Conto	et Analysis Report ge Analyzer ded Properties	•		Forward Reverse	,		
5	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	Link Invarchar	00		Dual - Combined V	iew 🕨		projects Project

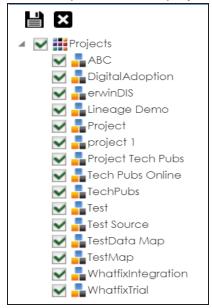
6. Use the following options:

All Projects

Use this option to include all the projects in lineage analysis.

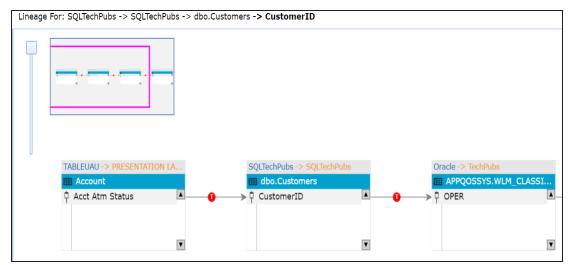
By Project

Use this option to select projects for lineage analysis.



By default, all the projects are selected. Clear the check boxes for the projects that are not required. Then, click

The column's lineage is generated based on the options you selected.



Working on Lineage

Lineage of a column shows how metadata moves through columns. It provides a summary of columns used as source and target. Also, it gives information about technical and business properties of columns involved in the lineage.

For example, the following image displays a column's lineage.

Lineage For: SQLTechPubs -> SQLTechPubs -> dbo.Customers -> CompanyName	Overview	Lineage	X 🛛 🔺	×II
		Summary		•
		Technical		-
		Property	Value	
		System Name	SQLTechPubs	
		Environment Name	SQLTechPubs	
		Table Name	dbo.Customers	
		Column Name	CompanyName	
erwinDoc -> erwinDOC TABLEUAU -> PRESENTATION LA SQLTechPubs -> SQLTechPubs	Oracle ->	Column Data Type	nvarchar	<u>e</u>
III CustDetails III Account III dbo.Customers		Column Precision	0	Ë
CustName CompanyName Acct Cod Ccy Acct Cod Ccy CompanyName Acct Cod Ccy	> D NCLS	Column Length	40	Self Help
		Column Scale	0	"
		Xpath		
• • •		Primary Key Flag	N	
		Column Identity Flag	N	
		Column Nullable Flag	N	
		Natural Key Flag	Ν	•
		•		•
		Business		•
		Transformations		•
		Valid Values		•
	•	Extended Properties		

Use the following options:

Overview Lineage (

Use this option to switch between detailed and overview lineage view.

Detailed lineage view: This view is helpful to technical users like ETL developers. When you reverse engineer ETL jobs or SQL scripts, the lineage might contain temporary tables, ETL components (filters, joiners, routers etc.). This view includes tables and columns that do not exist in the Metadata Manager.

For example, the following lineage displays the CustDetails table that does not exist in the Metadata Manager.

erwinDoc -> erwinDOC		TABLEUAU -> PRESENTATION L	A	SQLTechPubs -> SQLTechPubs	
III CustDetails		III Account		III dbo.Customers	
🖞 CustName	A () ;	Acct Cod Ccy		CompanyName	A 0
	V		V		V

Overview lineage view: This view is helpful to business users. It excludes tables and columns that do not exist in the Metadata Manager.

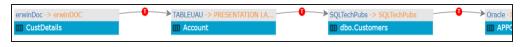
For example, the following lineage does not display CustDetails table that does not exist in the Metadata Manager.

TABLEUAU -> PRESENTA	ΠΟΝ LA	SQLTechPubs -> SQLTechP	Pubs
III Account		dbo.Customers	
🖗 Acct Cod Ccy	A 0	→ 🗘 CompanyName	
	T		V

Collapse/Expand ()

Use this option to switch between collapsed and expanded view. The expanded view includes columns involved in the lineage and the collapsed view excludes columns in the lineage.

For example, in the following lineage the collapsed view does not display columns involved in the lineage.



Auto Expand/Autofit (23)

This switch is enabled when you use the expanded view (). Use this option to switch between the Auto Expand view and Auto Fit view. The Auto Expand view shrinks the space for the list of columns and the Autofit view expands the space to fit the list of columns.

For example, the following lineage displays the Auto Expand view.

erwinDoc -> erwinDOC			TABLEUAU -> PRESENTATION	N LA		Oracle -> TechPubs	
III CustDetails			III Account			APPQOSSYS.WLM_CLA	SSI
CustCity	A	0	→ 🕴 Acct Prod Source Id		SQLTechPubs -> SQLTechPubs	NCLSRS	
CustName	Y	0	→ 🗘 Acct Cod Ccy		dbo.Customers	g → [†] SRSLCN	V
				•	CompanyName	4	
					P - company nume	T	

Export to Image (🖾)

Use this option to download the lineage in the JPG format.

Export to PDF (

Use this option to download the lineage in the PDF format.

Export to Excel

Use this option to download the lineage in the XLSX format.

Highlighting Lineage Path of a Column

To highlight a column's lineage path, click the column. The column is highlighted in orange color, its forward lineage path appears in red, and its reverse lineage path appears in blue.

erwinDoc -> erwinDOC	TABLEUAU -> PRESENTATION LA	SQLTechPubs -> SQLTechPubs	Oracle -> TechPubs	Salesforce -> TechPubs
E CustDetails	III Account	i dbo.Customers	APPQOSSYS.WLM_CLASSI	III Account
CustCity CustCity	🕴 Acct Prod Source Id	🕴 CompanyName 🔤 🚽 🕕	🗘 NCLSRS 🔼 🕹 👔	🖡 IsDeleted 🚺
	🕴 Acct Cod Ccy		C SRSLCN	
×		×	۲	T

Tables that are not part of a lineage path disappear.

For example, in the following lineage, the Account table disappears in the lineage path with respect to the SRSLCN column.

erwinDoc -> erwinDOC	TABLEUAU -> PRESENTATION LA	A	SQLTechPubs -> SQLTechPubs		Oracle -> TechPubs		
III CustDetails	III Account		dbo.Customers		APPQOSSYS.WLM_CLASSI		
CustCity	Acct Prod Source Id		CompanyName		VCLSRS		A
CustName	Acct Cod Ccy				SRSLCN		
X		T	T	1	V		V

Summary

This pane displays a summary of the lineage report. It gives information about number of columns acting as source, target, or both in the lineage.

Technical

By default, this pane displays technical properties of the column for which, you ran lineage analysis. You can click a column in the lineage and view its technical properties. The technical properties of a column include Column Data Type, Column Precision, Column Length, and so on. For more information on updating column properties, refer to the <u>Updating Column Properties</u> topic.

Business

By default, this pane displays business properties of the column for which, you ran the lineage analysis. You can click a column in the lineage and view its business properties. The business properties of a column include Column Definition, Logical Column Name, Column Class, and so on. For more information on updating column properties,

refer to the Updating Column Properties topic.

Transformations

To view transformations between two columns, click the link between the columns. The Transformations pane expands and displays the transformations.

 SQLTechPubs
 Oracle -> TechPubs

 Image: dbo.Customers
 Image: dbo.Customers

 Image: dbo.Customers</td

You can expand the transformation node to view the transformation details that includes Business Rule, Extended Business Rule, Trans lookup Condition, and Lookup On.

Transformations	
Property	Value
Target Column Scale	
Business Rule	UPPER
Extended Business Rule	
Trans lookup Condition	SELECT CompanyName FROM db dbo.Customers.CompanyName
Lookup On	CompanyName

Valid Values

To view valid values for a column, Click a column in the lineage, expand the Valid Values pane, and click the **Click Here** hyperlink. For more information on assigning valid values using codesets, refer to the Assigning Codesets to Columns topic.

Extended Properties

By default, this pane displays the extended properties of the column for which, you ran the lineage analysis. You can click a column in the lineage to view its extended

properties in this pane. For more information on configuring extended properties of columns, refer to the Extending Column Properties topic.

Running End to End Lineage

You can run end to end lineage analysis at project level and trace the data between any two mapping projects. The end to end lineage report can be drilled down further to trace intermediate stages of data.

To run end to end lineage at project level, follow these steps:

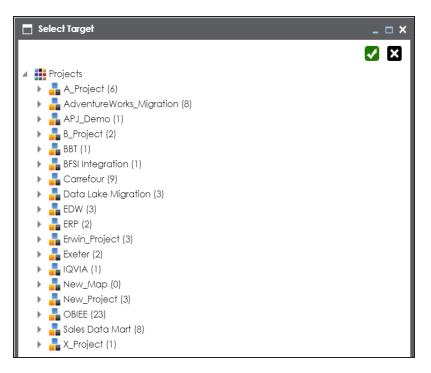
- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click the required source project.

The available options appear.

DATA INTELLIGENCE SUITE	New Map
Workspace Mappings	ៅ Upload Legacy Maps
	📑 UpLoad XML
 Mappings Transformations 	📌 New BaseLine
	Export All
A_Project (6)	🛐 Export Change Log
🕨 🔒 AdventureWorks	🛐 Export Mapping Manager XML
🕨 🔒 APJ_Demo (1)	
B_Project (2)	Edit Published Maps
 BBT (1) BFSI Integration (Reports
Carrefour (9)	New Subject Area
Data Lake Migra	Reorder Subject Areas
EDW (3)	Share Link
ERP (2)	
🔺 <mark></mark> Erwin_Project (3)	Delete Project
💏 Transformatic	🕉 Run Template
🇞 Test Cases	💦 End To End Lineage
🕨 🔜 Mappings	🔐 View Workflow
🕨 🌄 Erwin_Subject	(1)

3. Click End to End Lineage.

The Select Target page appears.



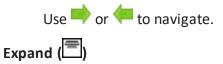
- 4. Select a target subject or a target project.
- 5. Click 🔽.

The End to End Lineage Summary page appears. You can drag and arrange column positions on the page for better visibility.

												📥 (!	¥ (
#		Source Project	Source Subject	Source System	Source Environment	Source Table	Source Column	Source XPath	Source User Defined-1	Source User Defined-2	Source Valid Values	Target Column	Targ
1	=	Erwin_Project		3rd Party Flat Files	3rd Party Flat Files	dbo.ADS_ASSOCIATION	TARGET_OBJECT_ID				Click Here		
2	=	Erwin_Project		3rd Party Flat Files	3rd Party Flat Files	dbo.ADS_ASSOCIATION	TARGET_OBJECT_TYPE_I				Click Here		
3	=	Erwin_Project		3rd Party Flat Files	3rd Party Flat Files	dbo.ADS_ASSOCIATION	RELATIONSHIP				Click Here		
4	۲	Erwin_Project		3rd Party Flat Files	3rd Party Flat Files	dbo.ADS_ASSOCIATION	ID				Click Here		
5	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	ID				Click Here	F_ID_New	
6	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	ID				Click Here	F_ID_New	
7	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	RELATIONSHIP				Click Here	F_ID_New	
8	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	RELATIONSHIP				Click Here	N_RELATIONSHIP_New	
9	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_New_ASSOCI	TARGET_OBJECT_ID_Nev				Click Here		
10	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_ID				Click Here	S_SOURCE_OBJECT_ID_	
11	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_New_ASSOCI	TARGET_OBJECT_TYPE_I				Click Here		
12	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_ID				Click Here		
13	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_New_ASSOCI	RELATIONSHIP_New				Click Here		
14	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	ID				Click Here		
15	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_TYPE_				Click Here	F_ID_New	
16	=	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_ID				Click Here		
17	目	Erwin_Project		New_Erwin	Erwin_Environmen	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_TYPE				Click Here	K_SOURCE_OBJECT_TYP	

Use the following options to work on the End to End Lineage Summary page:

Navigate



To expand the lineage summary, use \square . The expanded summary shows the intermediate stages of data.

													(り 🕷
ł	Project Name	Map Id	Map Name	Source System	Source Environment	Source Table	Source Column	Source XPath	Source Valid Values	Business Rule	Extended Business Rule	Target Valid Values	Target XPath	Targ
	Erwin_Project	233	Erwin_Map	3rd Party Flat	3rd Party Flat F	dbo.ADS_ASSOCIATION	TARGET_OBJECT_ID		Click Here	ABS		Click Here		TAR
	A_Project	248	K_New_Mapp	3rd Party Flat	3rd Party Flat F	dbo.ADS_New_ASSOCI	TARGET_OBJECT_ID_Nev		Click Here			Click Here		UT/

Reset Column Ordering (🔱)

Use this option to reset the column order on the page.

Export (🕙)

Use this option to export the lineage summary in the XLSX format.

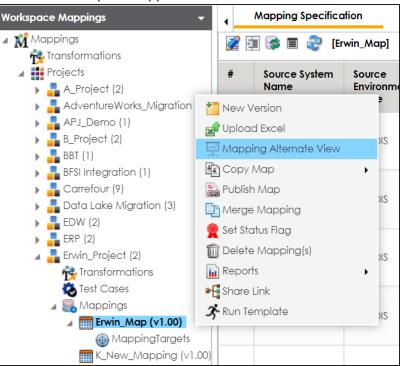
Opening Business View

You can open a concise view of mappings with an ability to instantly generate lineage and impact analysis. It is an alternate view for both workspace and published maps and more suitable for business users.

To open business view of mappings, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a map.

The available options appear.



3. Click Mapping Alternate View.

The Mapping Summary page appears. It has two sections, Mapping Details and Mapping Specifications.

Mo	ipping S	ummary									_ 1	
Nappi	ng Deta	ils									B <	4
pecifi	cation M	lame	Erwin_Map				Map Id					
ersio	ı		1.00					abel				
Nappi	ng Desc	ription	mapping descrip	tion								
arget	Tables		dbo.ADS New A	<u>SSOCIATIONS</u>			Source To	ables	dbo.ADS ASSOCIA	<u>TIONS</u>		
QL Q	Query et Update Strategy phical View View					SQL Query Description						
arget	tupdale Strategy View View						Map Spe	c Docs	View			
Fraph	blical View View Defined1						Extended	l Properties	View			
Jser D	efined1						User Defi	ned2				
Jser D	efined3						User Defi	ned4				
Jser D	efined5						View all L	Iser Defined Details				_
Nappi	ng Spec	ification										
				Target Det	ails				Tran	sformations		
#	Target Details Info System Environment Table Column Da					Data Type	(L/P/S)	Business Rule		Extended Business Rule	System	ľ
	=			bigint(8,19,	.0)	ABS			erwinDIS	\$		
	=	New_Erwin	Erwin_Environmer	dbo.ADS New ASSOC	ID_New bigint(8 SOURCE_OBJECT_ID_New bigint(8		.0)	ABS			erwinDIS	5
	=	New_Erwin	Erwin_Environmer	dbo.ADS New ASSOC	SOURCE OBJECT TYPE ID	bigint(8,19,	.0)	ABS			erwinDIS	;
	=	New_Erwin	Erwin_Environmer	dbo.ADS New ASSOC	TARGET OBJECT ID New	bigint(8,19,	.0)	ABS			erwinDIS	5
	=	New_Erwin	Erwin_Environmer	dbo.ADS New ASSOC	TARGET OBJECT TYPE ID	bigint(8,19,	.0)	ABS			erwinDIS	3
)

Mapping Details

It displays mapping details that includes mapping specification name, version, target update strategy, and lists of target and source tables.

Mapping Specification

It displays the Mapping Specification grid with source and target details.

Under the Mapping Details and Mapping Specification sections, you can click a <Table_Name> or <Column_Name> to view their respective details.

Table Details

To view table details, on the Mapping Summary page, click <Table_Name>.

The Table Details page appears. By default, the Impact Analysis tab opens. You can view direct, indirect, and other impacts of the table.

For more information on impact analysis, refer to the <u>Running Impact Analysis</u> topic.

_ To	ble Details							- 0
•	dbo.ADS_ASSOCIATIONS(
•	Columns Table Pro	operties Extended Properties	Data Lineage Impact Analysis	Workflow Log Data Que	lity Documents	Test Specification		
								🔊 🕇
Sumr	nary - Direct Impact	< Sum	mary - Indirect Impact		<	Audit Information		
		As Source	0 0		pstream Impact	Audit	Information	
		As Target			ownstream Impact	Created By	Administrator	
		- Voltaiger	Indirect Impact	📒 Ir	Business Rule	Created Time	01/01/2020 11:43:01	
	Direct Impact Indi	irect Impact Other Impacts						
As 50	urce							
-					_			
#	Project Name	Mapping Name	Target Information				Business Rule	
			Table	Environment	System			
1	A_Project	Erwin_Map	dbo.ADS New ASSOCIATIONS	Data_Migration	erwinDIS		ABS	
2	Erwin_Feb	Integration_Feb	dbo.RM_RESOURCE	Integration	Erwin_Sales			
3	Erwin_Project	Child_Map	dbo.ADS New ASSOCIATIONS	Data_Migration	erwinDIS			
As To	rget							
#	Project Name	Mapping Name	Source Information				Business Rule	
			Table	Environment	System			
				No Records Found				

You can click the following tabs to work on the Table Details page:

- Data Lineage: This tab displays the forward and reverse lineage of the table. For more information on lineage of tables, refer to the <u>Table</u> topic.
- Extended Properties: This tab displays the extended properties configured for the table. For more information on configuring extended properties, refer to the Extending Table Properties topic.
- Table Properties: On this tab, you can view the table properties. For more information on table properties, refer to the <u>Updating Table Prop</u>erties topic.
- Columns: This tab displays a list of columns in the table.
- Workflow Log: This tab displays the workflow log of the table. For more information on configuring workflows, refer to the <u>Using Workflow Man-</u> ager section.
- Data Quality: On this tab, you can preview and profile the data in the table. For more information on previewing and profiling data, refer to the <u>Previewing Data</u> topic.

- Documents: On this tab, you can view or add documents related to the table.
- Test Specifications: On this tab, you can view the test cases related to the table. For more information on test cases, refer to the <u>Creating Test</u> Cases topic.

Column Details

To view column details, on the Mapping Summary page, click <Column_ Name>.

The Column Details page appears. By default, the Impact Analysis tab opens. You can view direct, indirect, and other impacts of the column.

For more information on impact analysis, refer to the <u>Running Impact</u> <u>Analysis</u> topic.

	olumn Details	ATIONS.Data_Migration	n erwinDIS) 🔽					_ 0	
	-	_							
Co	olumn Properties Exte	ended Properties Dat	a Lineage Impact Analy	sis Workflow Log Valid Value	s Documents				
								X.	
Jmu	nary - Direct Impact		🕻 Summary - Indir	ect Impact		< Audit Information	on		
			ource 7	0 100 1	Upstream Impac	t Audit	Information		
			arget		Downstream Imp	Created By	Administrator		
		AST	arger	Indirect Impact	In Business Rule	Created Time	01/01/2020 11:43:02		
	Direct Impact	Indirect Impact	Other Impacts						
		indire en inip del							
s Sc	ource								
ŧ	Project Name	Mapping Name	Target Information				Business Rule		
			Column	Table	Environment	System			
1	A_Project	Erwin_Map	ID New	dbo.ADS_New_ASSOCIATIONS	Data_Migration	erwinDIS	ABS		
2	Erwin_Feb	Integration_Feb	RESOURCEID	dbo.RM_RESOURCE	Integration	Erwin_Sales			
3	Erwin_Project	Child_Map	ID New	dbo.ADS_New_ASSOCIATIONS	Data_Migration	erwinDIS			
s Ta	rget								
¥	Project Name	Mapping Name	Source Information				Business Rule		
			Column	Table	Environment	System			
				No Records Found					
								-	

You can click the following tabs to work on the Column Details page.

 Data Lineage: This tab displays the forward and reverse lineage of the column. For more information on lineage of columns, refer to the <u>Column</u> topic.

- Extended Properties: This tab displays the extended properties configured for the column. For more information on configuring extended properties, refer to the Extending Column Properties topic.
- Column Properties: This tab displays the column properties. For more information on column properties, refer to the <u>Updating</u> <u>Column Properties topic</u>.
- Workflow Log: This tab displays the workflow log of the column.
 For more information on configuring workflows, refer to the <u>Using</u> Workflow Manager section.
- Valid Values: This tab displays the codesets assigned to the column as valid values. For more information on assigning codesets to columns, refer to the Assigning Codesets to Columns topic.
- **Documents**: This tab displays the uploaded documents related to the column.

Viewing Mapping Statistics

You can view mapping statistics and view the following information about mapping specifications:

- Total rows
- Number of target tables
- Targets not mapped
- Sources not mapped
- Business rules
- Lookups

To view mapping statistics, follow these steps:

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

The Mapping Specification grid appears.

Workspace Mappings 🔹 👻		Mapping Specifico	tion Graph	ical Designer	Test Specification	Workflow Lo	g	•
Mappings	20	I 🔯 🔳 🍣 (Er	win_Map]		Profiles:	Default	- Ø	ò, 👫 🔊 < 🗵
Projects Garrefour (9) Gartefour (9) Gata Lake Migration (3)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
 EDW (2) ERP (2) Erwin_Project (2) 	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI/	ID	bigint	8	ABS
rransformations ঊ Test Cases ⊿ 🕞 Mappings	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI/	SOURCE_OBJECT_	bigint	8	ABS
Erwin_Map (v1.00) MappingTargets K_New_Mapping (v1.	3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI/	SOURCE_OBJECT_	bigint	8	ABS

3. click 🌣.

The mapping statistics are shown with hyperlinks.

Test Specification	Workflow	Log		×
Profiles:	Default	🗖 🗴 🗗	:	< 🛛
Source Column Name	Source Colum Data Type	Total Rows:	6	lule
Nume	Dala type	Target Tables:	1	
		Source Tables:	1	
ID	bigint	Targets Not Mapped:	ed: 0	
		Sources Not Mapped:	<u>0</u>	
SOURCE_OBJECT_	bigint	Business Rules:		
	Ŭ.	Possible Truncations:	<u>0</u>	
		Look Ups:	<u>0</u>	

You can click the required hyperlinks to get the detailed information.

Associating Mappings

This section walks you through the process of associating mappings with the following:

- Code Mappings or Code Crosswalks
- Reference Tables
- Requirements

It involves:

- Associating code maps with data item mappings
- Associating reference tables with mappings
- Linking requirements with mappings

Associating Code Maps with Data Item Mappings

A code map can be associated with a data item mapping to standardize data across the organization. These code maps are maintained in Codesets Manager. For more information on codesets and code mappings, refer to the <u>Using Codesets Manager</u> section.

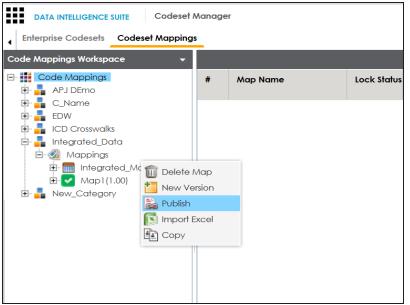
Before associating a code map with data item mappings, ensure that you publish the code map.

Publishing Code Maps

To publish code maps, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager > Codeset Mappings.
- 2. In the Code Mappings Workspace pane, right-click a code map.

The available options appear.



3. Click Publish.

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 ~

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

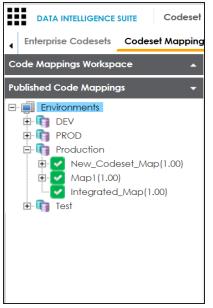
Field Name	Description						
Codeset Map	Specifies the name of the code map.						
Name	For example, Gender Crosswalk.						
Codeset Map	Specifies the new version of the code map.						
Version	For example, 1.02.						
Codeset Man	Specifies the description about the code map.						
Codeset Map Description	For example: The codeset map is the code mappings between the						
Description	two codesets, Misc Gender Codes and Gender.						
Map Version	Specifies the version label of the code map.						
Label	For example, Beta.						
Map Changed	Specifies the description about the changes made in the code map.						
Description	For example: Code values were updated.						
	Specifies the environment where the code map is being published.						
Publish Envir- onment	For example, test.						
onment	You can create publish environments in Enterprise Codesets.						

Field Name	Description
	For more information on creating publish environments, refer to the
	Publishing Codesets topic.

5. Click

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

A new version of the code 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.

Associating Code Maps

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

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

The Mapping Specification grid appears.

orkspace Mappings 🔹 👻	_ ۱	Mapping Specific	ation Grap	hical Designer	Test Specification	Workflow Lo	g		,
Mappings ^	20	i 🔯 🔳 🍣 (B	rwin_Map]			Profiles: Defaul	t 🔽	\$ La 🕺 🔊 < [7
 Projects Data Lake Migration (3) EDW (3) 	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	
 ERP (2) Erwin_Project (4) Transformations 	1	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	int	5	TRUNC	^
 Test Cases ✓ State Cases ✓ Mappings ✓ m Erwin_Map ((2	erwinDIS	Data_Migration	dbo.ADS_ASSOCI,	ID	bigint	80	TRUNC	
 Mappingragers ▶ ↑ Archive ■ K_New_Mapping ■ Trial_Map 	3	erwinDIS	Data_Migration	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	bigint	8	ABS	
Erwin_Subject (1)	4	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_PRO	int	4		

3. Click 🌌.

4. In the **Mapping Specification** grid, right-click the header menu.

۰.	Mapping Specifica	ation Graph	nical Designer	Test Specifi	cation Work	flow Log	l		•
20	I 🐼 II 🍣 (Fi	•	- 🕸 🗟 👫 🗟 < (7					
#	Source System Name	Source Environment Name	Source Table Name	Source Co Name	Jumn Source Co Data Type		Source Column Lenath	Business Rule	
1	A_System	A_Environment	dbo.CAT_DIALOG		Target Column A			TRUNC	^
2	erwinDIS	Data_Migration	dbo.ADS_ASSOCI,	ID	Specification Arti Lookup Reference Lookup On		n 🗸	TRUNC	
3	erwinDIS	Data_Migration	dbo.ADS_ASSOCI	SOURCE_O	SJECT_ bigint	8	3	ABS	

5. Select the **CSM Mapping** check box.

The CSM Mapping Column appears in the Mapping Specification grid.

- 6. In the right pane, expand **Code Mapping Catalogue**.
- Drag the code map into the Mapping Specification grid and drop it under the CSM Mapping column for the required row.

4 Mapping	g Specification	Graphical Desi	gner Test Spe	ecification W	orkflow Log	•	Metadata Catalogue 🔍
💰 🖬 🛃 🛛		[Erwin_Map]	Profiles:	Default	- ©	🐧 👯 🗟 🖬 📾 😣 < 🗵	Code Mappings Catalogue
arget Column ength	Created By	Created Date	CSM Mapping	Last Modified By	Last Modified Date Time	Reference Table	Code Mappings
		2019-10-21 14:36	5:15.057				▶ <mark>∎</mark> EDW
	Administrator	2019-10-21 14:36:15.057	Integrated_Map(1	1.00) ^{hinistrator}	2019-12-10 14:49:07.187		 CD Crosswalks Integrated_Data Mappings
	Administrator	2019-10-21 14:36:15.057		Administrator	2019-12-10 14:49:07.187		Map1 (1.00)

8. Click 🐻.

The code map is associated with the data item mappings.

Associating Reference Tables with Mappings

Reference data sets the permissible values for other data fields. To standardize your data, you can associate a reference table with mappings. Ensure that you publish the required reference table before associating it with mappings.

To associate reference tables with Mappings, follow these steps:

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

The Mapping Specification grid appears.

Workspace Mappings 🔹 👻		Mapping Specifico	tion Graph	nical Designer	Test Specification	Workflow Lo	g	•
Mappings		APPEND 077	🛛 😂 [Integration	1]	Profiles:	Default	🔽 🏟 🛛	, 👫 🔊 🖬 🐻 😣 < 🔎
 Projects ERP (3) Erwin_Feb (1) 	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
 Erwin_Project (5) Erwin_Sales (1) Transformations 	1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEID	int	4	FLOOR
Kongeneration	2	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCENAME	varchar	100	REVERSE
	3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	dbo.RM_Resource

- 3. Click 🜌.
- 4. Right-click the header menu.

•	Mapping Specifica	tion Grap	hical Designer	Test Specification	Workflow L	og
<u>i</u>		🛛 😂 [Integratio	n]	Profiles:	Default	- 🌻 La
#	Source System Name	Source Environment Name	Source Tah Name	User Defined-45	Source Column	Source Column Length
1	Erwin_Sales	Integration	dbo.RM_RE	User Defined-47 User Defined-48 User Defined-49 User Defined-50		4
2	Erwin_Sales	Integration		Mapping Spec Row Cor Row Order Reference Table	mments	100

5. Select the Reference Table check box.

The Reference Table column appears in the Mapping Specification grid.

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

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

4 Mapping	g Specification	Graphical Desi	gner Test Spe	cification W	orkflow Log		÷	Metadata Catalogue 🔍 🎝
📓 🖬 🛃 🛛	APPEND 077 🐯	[Erwin_Map]	Profiles:	Default	■ Ô:	lo, 👫 🗟 🖬 🐻 🐼 <		Code Mappings Catalogue
arget Column	Created By	Created Date	CSM Mapping	Last Modified By	Last Modified Date Time	Reference Table		 Code Mappings C_Name
.ength		2019-10-21 14:36	5:15.057		Dale lime			EDW
	Administrator	2019-10-21 14:36:15.057	Integrated_Map(1	.00) ^{ninistrator}	2019-12-10 14:49:07.187		^	 ICD Crosswalks Integrated_Data Mappings Integrated_Map(1.00)
	Administrator	2019-10-21 14:36:15.057		Administrator	2019-12-10 14:49:07.187			Map1(1.00)

7. Click 🔜.

The reference table is associated with the mappings.

Linking Requirements to Mappings

To ensure enterprise-wide traceability, you can link your functional requirements to data mappings.

To link functional requirements to mappings, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. Click a mapping.

The mapping opens in the detailed view.

mations	APPEND OF	🛛 🎅 [A_Map]		Profiles: Default	-	🌣 🗟 🔣 🖉) 🖬 🐻 😣 < 🗷	A Metadata Matadata Matadata Matadata
oject (1) ransformations	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
est Cases tappings A_Map (v1.00) MappingTargets	1 A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	int	4		 Atlas Sales System BI BO Reports Customer Order Entry
entureWorks_Migration (8) Demo (1) 1)	2 A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_PRC	int	4		Data Lake Data Models EDW
ntegration (1) four (9) Lake Migration (3) (2)	3 A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	50		
2) _Project (2) r (2)	4 A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	4000		PeopleSoft Salesforce SAP
(1) Project (1) (23) Data Mart (8)	5 A_System	A_Environment	dbo.CAT_DIALOG	CREATED_BY	varchar	50		
	6 A_System	A_Environment	dbo.CAT_DIALOG	CREATED_DATE_TI	datetime	8		Code Mappings Catalogue

3. On the Mapping Specification tab, right click the grid header.

A list of header columns appears.

Workspace Mappings 🛛 👻 👻	_ ۱	Mapping Specific	ation Gra	phical Designer	Test Spe	cification	Workflow Lo	g
Mappings			🛛 🎅 [A_Map]		Profiles:	Default	-	¢
🔺 🏭 Projects	#	Source System Name	Source Environment	Source Table	Source	Column	Source Column	Sourc
A_Project (1) Transformations		Name	Name	CSM Mapping	, 0	-	Data Type	Lengt
Image: State Sta	1	A_System	A_Environment	 Specification Artif Lookup Reference Lookup On Trans Lookup Col 	e Column		nt	4
 MappingTargets AdventureWorks_Migration (8) APJ_Demo (1) BBT (1) 	2	A_System	A_Environment	Source Column P Source Column S	recision		. nt	4
BFSI Integration (1) Carrefour (9) Data Lake Migration (3)	3	A_System	A_Environment	dbo.CAT_DIALC	G CAT_DIA	ALOG_TAB	varchar	50

4. Scroll down the list and select the sSpecification Artifact check box.

The specification Artifact column becomes visible on the Mapping Specification tab.

- 5. In the right pane, click **Specification Artifact Catalogue**.
- 6. Expand the project that contains the required specification.
- 7. Drag and drop the specification on the **Specification Artifacts** column in the required row.

Nanager						â Sec	arch 🔍 🗘 🖉 🖪
4 Map	ping Specification	Graphical	Designer Test	Specification Workflow Log		•	Metadata Catalogue 🔍 🔺
1		A_Map]	Profil	es: Default 🔽 🚺	: 🔥 🔣 🛛 🗖	d 🔁 😣 😡	Code Mappings Catalogue
et Column	Target Column	Created By	Created Date	Specification Artifacts	Last Modified By	Last Modified Date Time	Specification Artifact Catalogue 🗸
Туре	Length					Date time	Specification Templates Catalogue EDW (0)
	4	Administrator	2019-10-16 15:44:32.383	Sp_Name (v1.00)	Administrator	2019-10-17 11:56:07.883	 APJ (1) ARCBS (1)
	4	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353	 P_Name (1) Image: Specifications Image: Sp_Name (v1.00)
ar	50	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353	

8. Click 🐻.

Requirements are linked to the selected mapping.

Publishing and Creating Versions of Mappings

This section walks you through the process of publishing mappings to corresponding source or target production environments. Production environments of the source and the target are defined in the Metadata Manager. You can also create new versions of the mappings while archiving the older versions.

It involves:

- Creating versions of maps
- Base-lining Projects
- Comparing two different mapping versions
- Publishing mappings
- Restoring archived maps as active

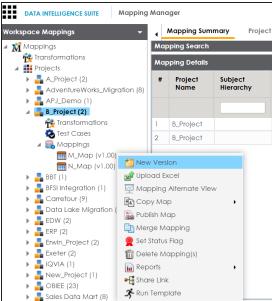
Creating Versions of Maps

You can create new version of maps and track history of changes made in the mapping specification. You can also notify and send mail comments to all the project users about the creation of new version. For more information on notifying project users, refer to the Configuring Notifications topic.

To create versions of maps, follow these steps:

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

The available options appear.



3. Click New Version.

The New Version page appears.

New Version	Li C	× □ _
Mapping Name*	M_Map	
Mapping Version	1.01	
Mapping Description		Ť
Version Label		
Changed Description*		•
		Ŧ
Mail Comments		-

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

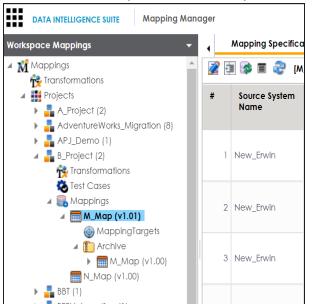
Field Name	Description							
Mapping	Specifies the mapping specification name.							
Name	For example, EDW_PROD_IDS_Benefits_Detail.							
Mapping	Specifies the new version of the mapping specification.							
Version	For example, 1.02.							
MappingSpecifies the description about the mapping.DescriptionFor example: This is a map between EDW source and IDS target system								
Description	For example: This is a map between EDW source and IDS target systems.							
	Specifies the version label of the mapping specification.							
Version	For example, Beta.							
Label	For more information on configuring version display of mapping spe-							
	cifications, refer to the Configuring Version Display topic.							
Changed	Specifies the description of the changes made in the mapping spe-							
Description	cification.							
	For example: A business rule for a source column was added.							
Mail Com-	Specifies the mail comments, which can be sent to the project users							
ments	through an email notification.							
	For example: Target update strategy is not updated.							

Field Name	Description
	For more information on configuring notifications, refer to the Con-
	figuring Notifications topic.

5. Click 💾.

A new version of the map is created and the previously active version moves under the archive folder.

Note: Archived maps are in read-only mode and cannot be edited.



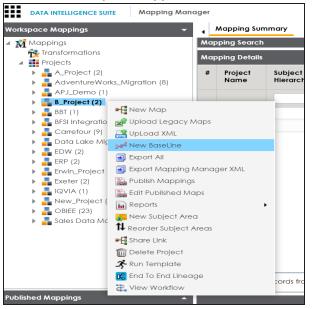
Base-lining Projects

Base-lining a project brings all maps in the project to the same version. You can base-line all the maps in a project and record change description and notify all the project users and send mail comments to them.

To base-line projects, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a project.

The available options appear.



3. Click New Baseline.

The New Baseline page appears.

New Baseline	 Lii X
Version Label	
Change Description*	* = *
Mail Comments	Y

4. Enter Version Label, Change Description, and Mail Comments.

For example:

Version Label - Beta.

For more information on version display, refer to the <u>Configuring Version Display</u> topic.

- Change Description Business rule for all the source column was changed to ASCII.
- Mail Comments The target update strategy needs to be updated.

For more information on notifying project users, refer to the <u>Configuring Noti-</u><u>fications</u> topic.

5. Click 💾.

The project is base-lined and all the maps in the project now have the same version. Project users receive email notifications about the base-lining and mail comments, if you enable notifications for it. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.

Comparing Two Different Mapping Versions

You can use the advanced mapping comparison ability to quickly and efficiently compare any

two mapping versions. You can view the changes on a row by row basis and improve your debugging ability.

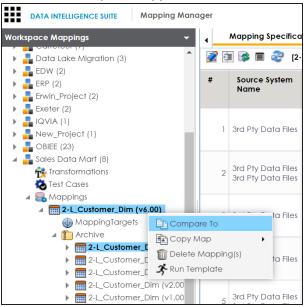
To compare two different mapping versions, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, select two mapping versions.

Note: Use shift keys to select the two mapping versions.

3. Right-click the selection.

The available options appear.



4. Click Compare To.

The Compare To page appears. All the changes are highlighted in red color in the comparison report.

										Exclude Commo	on Rows Export: 🔊 🔂	
											in Rows Export.	
Development Te	am											
											i i	
	2-L_Customer_Dim (V6.00											
Map2 Name:	2-L_Customer_Dim (V5.00	/VLv4x)										
								irce Details				_
Version	System	Environment	Table	Column	Data Type	Length	Precision		Definition	Comments	Logical Column Name	
6.00 5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber CustNumber	Varchar(10)	10.0			Customr Number Customr Number			
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0		6	Customr Number			
							Sor	rce Details				
Vertion	System	Environment	Table	Column	Data Type	Length	Precision		Definition	Comments	Logical Column Name	
5.00	3rd Ptv Data Files	3rd Ptv Data Files	Customers	CustNumber	Varchar(10)	10.0	Treasure		Customr Number	comments	Logical Coldina - Mart	
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0			Custom Number			
	510110 54011005	Junity Data Lines	Comment	Cours Tamora	(action(10)	10.0						
							Sou	rce Details				
Version	System	Environment	Table	Column	Data Type	Length	Precision	Scale I	Definition	Comments	Logical Column Name	
6.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0		1	First Name			
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0		1	First Name			
							Sou	arce Details				
Version	System	Environment	Table	Column	Data Type	Length	Precision		Definition	Comments	Logical Column Name	
6.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0			First Name			
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0		1	First Name			
							Sor	urce Details				
	Syntem	Environment	Table	Column	Data Type	Leagth			Definition	Comments	Logical Column Name	
Version 5.00	3rd Ptv Data Files	2 3rd Ptv Data Files	Customers	Full Address	Varchar(50)	50.0	Precision		Definition	Comments	Logical Column Name	

To exclude exporting common rows in the report, select **Exclude Common Rows Export**.

Use the following options to export the comparison report:

- To export the report in the PDF format, click 1/10.
- To export the report in the XLSX format, click 🕙.
- To export the report in the HTML format, click

Publishing Mappings

You can publish a map on an effective date and enter publishing notes for a record. Before publishing mappings, ensure that the source and the target environments have their corresponding production environments.

Publishing Mappings

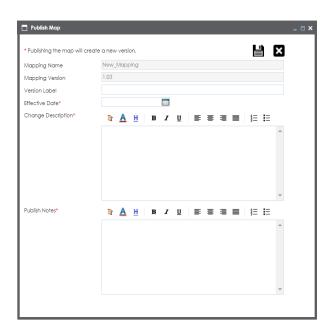
To publish mappings, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a map.



3. Click Publish Map.

The Publish Map page appears.



Field Name	Description						
	Specifies the mapping specification name.						
Mapping Name	For example, EDW_PROD_IDS_Benefits_Detail.						
Nume	It is autopopulated and you cannot edit this field.						
	Specifies the version of the mapping specification.						
Manning	or example, 1.00.						
Mapping Version	It is autopopulated.						
Version	For more information on configuring version display of maps, refer to						
	the <u>Configuring Version Display</u> topic.						
	Specifies the version label of the mapping specification.						
Version	For example, EDW_PROD_IDS_Benefits_Detail (Alpha).						
Label	For more information on configuring version display of maps, refer to						
	the <u>Configuring Version Display</u> topic.						
Effective	Use 🥅 to enter the effective date of publishing.						
Date	For example, 04/02/2020.						

Field Name	Description
Change	Specifies the description for changes made in the mapping specification.
Change Description	For example: Business rule was modified from ABORT to ASCII for the
Description	source column ID.
Publish	Specifies the publish notes about the mapping specification.
Notes	For example: The mapping specification is approved for publishing on 1
NULES	Feb 2020.

5. Click 💾.

The mapping is published on the effective date and saved in the **Published Mappings** pane. The source and the target environments in the published mapping are updated to their corresponding production environments. All previously published versions of the same mapping are stored in the History folder. A published mapping cannot be edited.

A new version of the mapping is automatically created in **Workspace Mappings** that can be edited.

To view published map details, in the **Published Mappings** pane, click the <Mapping_ Name>.

The business view of the mapping appears which can be used to run impact analysis, lineage analysis, and data quality etc. For more information on business view, refer to the Opening Business View topic.

space Mappings	🔺 Map	ping D	etails									R	<
shed Mappings	Spec	ificatio	n Name	New_Mappin	g		Map Id	ł	219				T
Projects	Versi	on		1.03			Versio	n Label					
A_Project	Map	ping D	escription										
AdventureWorks_Migration BFSI Integration EDW Erwin_Project	Targe	Target Tables		dbo.ADS_ASS dbo.ADS_FOF dbo.ADS_KEY dbo.ADS_KEY	RM		Source	dbo./ dbo./		IATIONS <u>NUE</u> NUE_OBJECTS			
New_Project	SQL (Query					SQL Q	uery Description					
🖌 🌉 Mappings	Targe	et Upda	ate Strategy					pec Docs	View				
New_Mapping(v1.03) History		14 A.		1.0					14				
	Map	ping Sp	ecification	_	_	_	_			l			
					Target De	tails		Transformations					
	*	Info	System	Environment	Table	Column	Data Type (L/P/S)	Business Rule		Extended Business Rule	e	Syste	m
	1	=	New_System	New_Environn	dbo.ADS KEY VA	OBJECT PARENT TYP	varchar(500,0,0)	UPPER				New_	Sy:
	2	=	New_System	New_Environn	dbo.ADS_KEY_VA	OBJECT_PARENT_CO	varchar(500,0,0)					New_	Sy:
	3	-	New_System	New_Environn	dbo.ADS KEY VA	MODULE KEY	varchar(255,0,0)					New_	Sy:
	4	-	New_System	New_Environn	dbo.ADS_KEY_VA	OBJECT_TITLE	varchar(255,0,0)					New_	Sys
	5	=	New_System	New_Environn	dbo.ADS KEY VA	OBJECT TYPE ID	bigint(8,19,0)					New_	Sys
	6	=			dbo.ADS_KEY_VA		varchar(500,0,0)					New_	Sys
	7	-	New_System	New_Environn	dbo.ADS KEY VA	OBJECT TABLE COLL	varchar(500,0,0)					New_	Sys
													5

Updating Publishing Details

To update publishing details of published maps, follow these steps:

1. In the Workspace Mappings pane, right-click the required project.

	SUITE Mapping Manager
Workspace Mappings	New Map
Mappings Transformation Projects A_Project (a A_Project (a A_Project (a A_Project (a) A_PJ_Demo	UpLoad XML Sy Vew BaseLine So Export All So Export Mapping Manager XML
 B_Project (2 BBT (1) BFSI Integra 	fi Edit Published Maps
 Carrefour (\$ Data Lake I EDW (3) 	_
 ERP (3) Erwin_Feb (Erwin_Project Erwin_Sales 	ci 🛅 Delete Project
 Exeter (2) IQVIA (1) New_Project OBIFE (23) 	End To End Lineage

The available options appear.

2. Click Edit Published Maps.

The Edit Publish Mappings page appears. You can use **Filter by Effective Date** to filter the mappings based on the effective publishing date.

Edit Publish Mappings													_ 🗆 ×
							Filter	r By Effe	ctive Date*	02/07	/20 12:36:	00 PM	-
Publish Tree <	Mapping Effective	Date											
 ✓ III Projects ✓ III New_Project 												X	
A Reprings New_Mapping	Publish Notes*	1	<u>A</u>	H	в	I	U	≣		1 3	1 = 1	≣ *≣	*
													~
	Effective Date*												

3. In the **Publish Tree** pane, select the required published map.

Now, you can update Publish Notes and Effective Date.

4. Click 💾.

The publishing details of the map is updated.

Restoring Archived Maps As Active

When you create a new version of a map, the older version is archived. The archived map is in read-only mode and cannot be edited. You can restore an archived map as an active map and work on the map.

To restore archived maps as active, follow these steps:

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



The Restoring Archived Mapping as Active page appears.

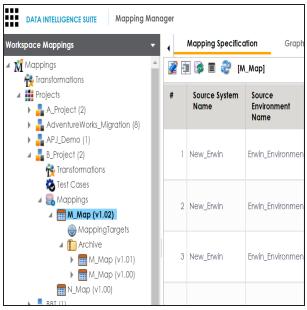
Restoring Archived Mapping	as Active	ĽX	_ 🗆 X
Mapping Name*	M_Map		- 11
Mapping Version	1.02		- 11
Mapping Description		▲ ▼	
Version Label			- 1
Changed Description*	<u>▼ ▲ ⊬</u> в <i>х</i> ⊻ ≡ ≡ ≡ ≡ !⊟ !⊟ !≡ !≡	*= 💉	
		•	
Mail Comments			-

Field Name	Description
Mapping	Specifies the mapping specification name.
Name	For example, EDW_PROD_IDS_Benefits_Detail.
Mapping	Specifies the new version of the mapping specification.
Version	For example, 1.02.
Mapping	Specifies the description of the mapping.
Description	For example: This is a map between EDW source and IDS target systems.
	Specifies the version label of the mapping specification.
Version	For example, Beta.
Label	For more information on configuring version display of mapping spe-
	cifications, refer to the Configuring Version Display topic.
Changed	Specifies the description of the changes made in the mapping spe-
Description	cification.
Description	For example: A business rule for a source column was added.
Mail Com-	Specifies the mail comments which can be sent to the project users

Field Name	Description
	through an email notification.
ments	For example: Target update strategy is not updated.
	For more information on configuring notifications, refer to the <u>Con</u> -
	figuring Notifications topic.

4. Click 💾.

The archived map is restored as a new version and the existing active map is archived.



Exporting Mapping Specifications

This section walks you through the process of exporting mapping specifications. Once the mappings are approved for coding requirements like ETL Jobs, SQL Scripts, Python Code, Spark Code, DDL Scripts, or Stored Procedures then you can export them.

You can export mapping specifications to:

- the proprietary XML format
- generate ETL jobs

Proprietary XML Format

Once the mappings are approved for coding, you can export the mappings as coding requirements in the XML format.

To export mapping specifications into proprietary XML format, follow these steps:

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

The Mapping Specification grid appears.

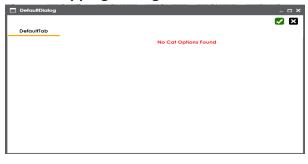
DATA INTELLIGENCE SUITE Mapping	Manag	ger							A Search
Workspace Mappings 🔹 👻	•	Mapping Specifico	ation Grap	hical Designer	Test Specification	Workflow Lo	g		•
Mappings	2	🗐 😵 🗏 🍣 (Ei	win_Map]				Profiles:	Default 🔽 🕸 [à 👫 🛛 < 🛛
Projects	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	Extended Business Transformation
Transformations	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	D	bigint	8	ABS	
 Erwin_Map (v1.03) MappingTargets Archive 	2	2 erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	_ bigint	8	ABS	
m K_New_Mapping (v1 ▶	3	8 erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	_ bigint	8	ABS	

3. Click 👯.

The Export Window page appears.

Export Window										
ETL Integration Library: To	extend the library, conta	ct support - 🔀								
A Mapping Manager	Testing Automatic	on ETL Engineering	Data Vault 2.0							
Nasdaq Data Asset Form										
	Type : CAT									
	Created By [Time]: Last Updated By [Time]:									
Mapping Manager XML	Mapping Manager XML									
Group> Group> Group> Group> Group> Glement> Glement> Glement> Glement>	Mapping Manager XML									
<pre></pre>	Type : CAT		/							
		AnalytiX Data Services [09/14, AnalytiX Data Services [09/14/	-							

4. Select Mapping Manager XML and click



- 5. Click 🗹.
- 6. Select the required mappings and click 🛍.

The following notification appears.

			Learch	५ 🌣 🛛 🖪
Profiles:	Default	Normal Provest 298 B Cont B Cont B Cont	ownload File	Catalogue 🔍 🗸
Column	Business Rule		Extended Business Transformation	A_System AdventureWorks AMERISURE
	ABS			 Atlas Sales System BI BO Reports
				Customer Order Entry

7. Click the **Download file** hyperlink.

A ZIP file is downloaded. Unzip this file to use the mapping specification in the XML format.

ETL Jobs

Once the mappings are considered 'approved for coding', you can export the mappings as coding requirements to automatically generate ETL/ELT jobs. The ETL jobs can be generated for tools, such as Informatica PowerCenter, IBM DataStage, Microsoft SQL Server SSIS, and Talend.

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

Workspace Mappings 🛛 👻		Mapping Specific	ation Grap	hical Designer	Test Specification	Workflow Lo	og	,
 Mappings Transformations 		I 🔯 II 💸 (B	rwin_Map]		Profile	es: Default	• Ø	la 👯 🗟 < 🗵
 Projects Data Lake Migration (3) EDW (2) 	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
ERP (2)	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	ID	bigint	8	ABS
 ★ Test Cases ✓ Cases ✓ Mappings → Envin_Map (v1.00) → Envin_K_New_Mapping (v1.00) 	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	bigint	8	ABS
Exeter (2) GVIA (1)	3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	bigint	8	ABS

The Mapping Specification grid appears.

3. Click **K**.

The Export Window page appears.

Export Window						_ 🗆 ×					
ETL Integration Library: To	extend the library, contac	ct support - 🔀		Filter :	ALL 🔻	ί					
Mapping Manager	Testing Automatio	on ETL Engineering	Data Vault 2.0	Big Data	ARCBS Reports	Care 🕨					
	Nasdaq Data Asset Form										
	Type : CAT										
	Created By [Time]: Last Updated By [Time]:	Administrator [12/18/2018 04: Administrator [12/18/2018 04:									
Mapping Manager XML	Mapping Manager XML Mapping Manager XML Type : CAT Created By [Time]: Last Updated By [Time]:	AnalytiX Data Services [09/14/ AnalytiX Data Services [09/14/									
	Generate JSON Schema Generate JSON Schema										

4. Click the ETL Engineering tab.

	Export Window						_ _ ×						
		extend the library, contac	et support - 🔽		Filter :	ALL							
			_		/ NLL								
•	Mapping Manager	Testing Automatic	ETL Engineering	Data Vault 2.0	Big Data	ARCBS Reports	Care 🕨						
	INFOR- MATICA	Informatica 9x This template creates a simple ETL job for the selected Mappings											
	ЧСАТ	Type : CAT											
		Created By [Time]: Last Updated By [Time]:	AnalytiX Data Services [09 AnalytiX Data Services [09		Click an option to Export								
	SSIS	SSIS Forward 2012 This template creates a sim	ple ETL job for the selected	Mappings									
	Y CAI	Type : CAT											
		Created By [Time]: Last Updated By [Time]:	AnalytiX Data Services [09 AnalytiX Data Services [09										
		Import Microsoft SSIS D Import SSIS DTSX Package		2 & 2014 Versions of Microsof	't SQL Server								

5. Select the required ETL tool and click 🛍.

The Multi Mapping page appears.

Multi Mapping	_ — ×
Load Active Mappings Load ALL Mappings	① 🛛
Projects A_Project (1) AdventureWorks_Migration (8) APJ_Demo (1) BBST (1) BFSI Integration (1) Carrefour (9) Data Lake Migration (3) EDW (2) ERP (2) ERP (2) Ervin_Project (2) Frvin_Project (2) Exeter (2) Exeter (2) IQVIA (1) New_Project (1)	1
 OBJEE (23) Sales Data Mart (8) 	

6. Select the mapping and click 🛍.

The following notification appears.

			La Search	Task D		
Workflow Log Profiles		CAT	Download File		, X 2 < D	Metad Q V
Source Column Data Type	Source Colui= Length				nded Busine Transformation	A_Syst Adver AMERI
bigint	8	AB	S		*	 Atlas S BI BO Re

7. Click the **Download File** hyperlink.

The mapping specification is exported.

Creating and Managing Test Cases for Mappings

You can create test cases for testing data mappings and ETL processes in the Mapping Manager for:

- Projects
- Mappings

The test cases created at project-level apply to all the mappings created under the project. Whereas, map-level test cases apply to particular map.

Creating and managing test cases involves:

- Creating test cases
- Adding validation steps
- Adding documents
- Managing test cases

Creating Test Cases

In the Mapping Manager, you can define test cases at:

- Project-level
- Map-level

At the project-level, you can create multiple test cases. Whereas, at the map-level, you can create a single test case.

Creating Project-Level Test Cases

To create project-level test cases, follow these steps.

- 1. Go to Application Menu > Data Catalog > Mapping Manager > Workspace Mappings.
- 2. Expand a project and click the **Test Case** node.

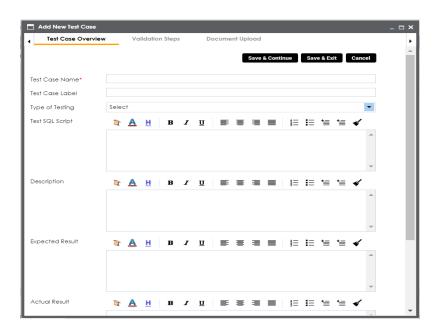
The Test Case Summary page appears.

DATA INTELLIGENCE SUITE Mapping	g Manag	ler				
Workspace Mappings 🛛 👻	Test C	ase Summary				
 Mappings Transformations 	€	⊕ ⊕				
 Projects A_Project (1) AdventureWorks_Migration (8) APJ_Demo (1) Erwin_Project (2) Transformations Test Cases Mappings Erwin_Map (v1.00) K_New_Mapping (v1.00) 	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Dese

3. Click •

The Add New Test Case page appears.

Note: Test cases created for a project are also applicable to the mappings under a project.



Field Name	Description
Test Case	Specifies the name of the test case.
Name	For example, Verifying the Completeness of Source Metadata.
Test Case	Specifies the unique label for the test case.
Label	For example, Source Metadata.
Type of Test-	Specifies the type of testing.
ing	For example, Metadata Testing.
Test SQL	Specifies the SQL script required in the test execution.
Script	For example, select * from dbo.ADS_ASSOCIATIONS.
	Specifies the test objective in brief.
Description	For example: The objective of the test case is to verify the com-
	pleteness of source metadata.
Expected Res-	Specifies the expected result of the test case in detail.
ult	For example: The source table should have 50 columns.
Actual Result	Specifies the actual test result after the execution of the test.

Field Name	Description
	For example: The source table has 39 columns.
Testing Com-	Specifies the testing comments about the test case.
ments	For example: The source metadata was scanned from a Sql Server data
	base.

5. Click Save and Exit.

The test case is created and added to the **Test Cases** node.

Creating Map-Level Test Cases

To create map-level test cases, follow these steps.

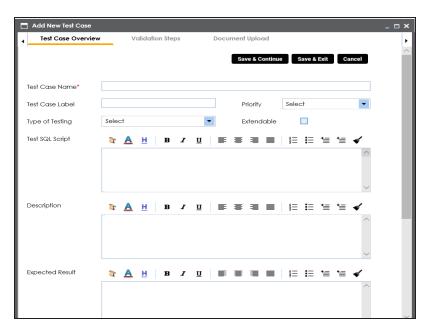
- 1. Go to Application Menu > Data Catalog > Mapping Manager > Workspace Mappings.
- 2. Click a mapping and click the **Test Specification** tab.

It displays the existing project-level test cases.

DATA INTELLIGENCE SUITE Mapping	g Manager							A Search		Q	\$ 0 B
Workspace Mappings 🗸 👻	۰ N	apping Specific	ation Grap	hical Designer	Test Specificat	on Work	flow Log			•	Metadata 🔍 👻
Mappings	€ (• • •							۵ 🖉 🕸	×	✓ Metadatc ^ ▶ 3rd Pa
 Projects A_Project (2) 	# T	est Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approved	Map	 A_System Adven
 AdventureWorks_Migration (APJ_Demo (1) 											 AMERI: Atlas S
 B_Project (2) BBT (1) 	19		T_Name								 ■BI ■BO Rep
 BFSI Integration (1) Carrefour (9) 											 Custor Data L
 Data Lake Migration (3) EDW (2) 	•									Þ	Data N EDW
 ERP (2) Enwin_Project (2) Transformations 			< -≺	Records from 1 to		Page 1	25 rov	vs per page			 erwinD JDEdw New_E
Test Cases	<u>ا</u>	est Case Overvi	ew Valida	tion Steps	Document Uplo	ad Ext	ended Prope	erties		Þ	
Mappings Frwin_Map (v1.04) MappingTargets											Salesfc
K_New_Mapping (v1.	Test C	ase Id	9		Extern	al Test Case Id					• • • • • • • • • • • • • • • • • • •
Exeter (2)	Test C	ase Name*	T_Name								Code Mappin 🔺
▶ 🔒 IQVIA (1) 👻	Test C	ase Label									Specification / 🔺
Published Mappings										•	Reference Tab 🔺

3. Click 🕑.

The Add New Test Case page appears.



Field Name	Description						
Test Case	Specifies the name of the test case.						
Name	For example, Verifying the Completeness of Source Metadata.						
Test Case	Specifies the unique label for the test case.						
Label	For example, Source Metadata.						
	Specifies the priority of the test case.						
Priority	For example, High. Priority for business rules and functional test cases						
	can be medium or higher.						
Type of Test-	Specifies the type of testing.						
ing	For example, Metadata Testing.						
	Specifies whether the test case is visible even when this map is						
Extendable	archived.						
	A map is archived whenever you create a new version of the map.						
Test SQL	Specifies the SQL script required in the test execution.						
Script	For example, select * from dbo.ADS_ASSOCIATIONS.						

Field Name	Description
	Specifies the test objective in brief.
Description	For example: The objective of the test case is to verify the com-
	pleteness of source metadata.
Expected Res-	Specifies the expected result of the test case in detail.
ult	For example: The source table should have 50 columns.
Actual Result	Specifies the actual test result after the execution of the test.
Actual Result	For example: The source table has 39 columns.
Tosting Com	Specifies the testing comments about the test case.
Testing Com- ments	For example: The source metadata was scanned from a Sql Server data-
ments	base.
Test Case	Specifies the status of the test case.
Status	For example, Passed.
Approved	Specifies whether the test case is approved.

5. Click Save and Exit.

The test case is added under the Test Specification tab.

Once a test case is created, you can enrich it by:

- Adding validation steps
- Adding documents

Managing test cases involves:

- Updating test case status
- Approving test cases
- Exporting test cases
- Deleting test cases

Adding Validation Steps

You can add multiple validation steps to the test cases at:

- Project-level
- Map-level

You can also specify actual and expected results for each validation step.

Adding Validation Steps to Project-Level Test Cases

To add validations to project-level test cases, follow these steps.

1. In the **Workspace Mappings** pane, expand a project and click the **Test Case** node. The Test Case Summary pane appears.

DATA INTELLIGENCE SUITE Mappi	ng Mana	ger			A S		९ 🗘 (08
Workspace Mappings	- Test (Case Summary						^
 Mappings Transformations 	÷	⊕ ⊎					×	×
🖌 🏭 Projects	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Created By	
 A_Project (2) AdventureWorks_Migration (
APJ_Demo (1)	1	9	T_Name				Administrator	· •
 B_Project (2) BBT (1) 								18
BFSI Integration (1)								
 Carrefour (9) Data Lake Migration (3) EDW (2) 			K K Records fro	om Ito I 🔉 👌 🕻	Page 1 🚬 🛛 25 rows pe	er page		,
ERP (2)		Test Case Overview	Validation Steps Do	cument Upload				ŀ
Transformations					Save	el		
▲ <table-of-contents> Mappings mathematical Amplitude Amplitud</table-of-contents>	Test	Case Id	9					
K_New_Mapping (v1.	Test	Case Label						18
Exeter (2)	▼ Test	Case Name*	T_Name					Ţ
	•							•
Published Mappings	•							

2. In the bottom pane, click the Validation Steps tab.

DATA INTELLIGENCE SUITE Mapping	Manage	er.				Ą	Search		Q 🗘 (08
Workspace Mappings 🛛 👻	Test Co	ase Summary								^
A_Project (2)	€	♠ �							×	×
 AdventureWorks_Migration (APJ_Demo (1) B_Project (2) 	#	Test Case Id	Test Case Name	Test Case Labe	і Тур	e of Testing	Descript	ion	Created By	
 BBT (1) BFSI Integration (1) 	1	9	T_Name						Administrator	r 🔺
 Carrefour (9) Data Lake Migration (3) EDW (2) 	•		IK K Re	cords from 1 to 1	> 🗅 Pag	e 1 _ 25 rov	/s per page			• •
ERP (2) Erwin_Project (2) Regramma framework (2)	1	Test Case Overview	Validation Steps	Document Upload		•	•			•
i Test Cases ⊿ ■ Mappings ■ Erwin_Map (v1.04)	Valida	tion Steps								٦
K_New_Mapping (v1.	#	Step Name	Step Type	Description	Created By	Created Date	Modified By	Modified Date		
QVIA (1) New_Project (1) OBIEE (23)						2019_10_18		2019-10-18		\$
Published Mappings			K K Re	cords from 1 to 2	> > () Pag	e 1 _ 25 rov	vs per page			

3. Click •

The Add Validation Steps page appears.

Add Validation steps															- 0	×
											Sa	ve	Canc	el		^
Validation Step Type	Selec	:†												•		
Step Name*																
Description	a	<u>A</u>	H	в	I	Ū	Ē	≣	≡	100	I≡	*≣	•≣			
														^		
														*		
Expected Result	<u>T</u>	<u>A</u>	H	В	I	Ū	≣	≣	1	άΞ	E	*≣	*≣			
														•		
														-		
Actual Result	T	<u>A</u>	H	в	I	Ū	≣	≣	≡	<u>ا</u>	I≡	*≣	*≣			
														-		-

Field Name	Description								
Validation Step	Specifies the type of validation step.								
Туре	For example, Data Check.								
Chain Nama	pecifies the unique name of the step.								
Step Name	For example, Validating Number of Columns.								
	Specifies the description of the validation step.								
Description	or example: This step validates the number of columns in the								
	ource metadata.								
	Specifies the expected result in detail.								
Expected Result	For example: The source table, dbo.ADS_ASSOCIATIONS should								
	have 50 columns.								
Actual Result	Specifies the actual test result after the execution of the test.								
	For example: The source table contains 50 columns.								
Test Step Com-	Specifies the comments about the step.								
ments	For example: The source metadata was scanned from a Sql Server								
	database.								

5. Click Save.

The validation step is added to the test case.

Adding Validation Steps to Map-Level Test Cases

To add validations to map-level test cases, follow these steps.

- 1. In the Workspace Mappings pane, expand a project and click a mapping.
- 2. Click the Test Specification tab.
- Double-click a map-level test case.
 The Test Case Summary pane appears.

DATA INTELLIGENCE SUITE Mapping Manager														
Workspace Mappings 🛛 👻	4	Mapping Spe	cification	Graphical Des	igner Tes	t Specification	Wo	rkflow Log		•	Metadata Catalogue 🔍 👻			
Mappings	€	• • •)						🕸 🤡 🕸	×	Metadata Matadata Matadata Matadata			
 Projects A_Project (2) 	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approved	Mat	AdventureWorks			
 AdventureWorks_Migration (APJ_Demo (1) 											AMERISURE Atlas Sales System			
B_Project (2)	1	9	T_Name							-	▶ 🗐 ВІ			
 BBT (1) BFSI Integration (1) 	2	11	Erwin_Test								BO Reports Gustomer Order Entry			
Carrefour (9)	3	12	New_Association	r Association	Source to Tar	ge Data Migra	t in the second s				 Data Lake 			
Data Lake Migration (3)	•									+	Data Models			
 EDW (2) ERP (2) 			EDW erwinDIS											
Erwin_Project (2)	L						•	5 rows per page	•		JDEdwards			
Transformations	 -	Test Case Ov	erview	Validation Step:	5 Doc	ument Upload	E	xtended Proper	lies	•	New_Erwin			
🍋 Test Cases 🖌 🖳 Mappings									Ø		ODS PeopleSoft			
Erwin_Map (v1.04)									Ø		Salesforce			
 	Te	est Case Id	11			External 1	iest Case I	d			 ▶ ■SAP ▶ ■T_New ▼ 			
K_New_Mapping (v1.	Te	est Case Name*	Erwin_Tes	t							Os da Umaria es Ostala eus			
 Exeter (2) IQVIA (1) 											Code Mappings Catalogue 🔺			
	Te	est Case Label				Priority					Specification Artifact Catalogue 🔺			
Published Mappings	Ty	pe of Testing				Extendat	ole 🗌				Reference Table Catalogue			

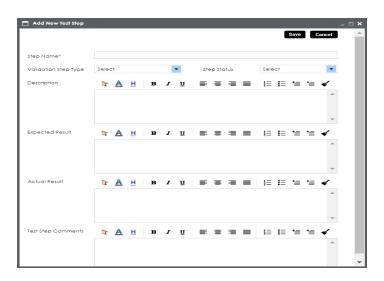
4. In the bottom pane, click the Validation Steps tab.

The Validation Steps tab appears.

DATA INTELLIGENCE SUITE Mapping	Mana	iger							A Search		९ ३ थि छ
Workspace Mappings 🗸 🗸	•	Mapping Spe	cification	Graphical Des	igner Te	st Specification	Wo	orkflow Log		•	Metadata Catalogue 🔍 👻
Mappings	€	• • •)						🕸 📀 🕸	×	Metadata Matadata Matadata Matadata
Projects A_Project (2)	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approved	Mat	AdventureWorks
 AdventureWorks_Migration (APJ_Demo (1) 											AMERISURE Atlas Sales System
B_Project (2)	1	9	T_Name								BI
 BBT (1) BFSI Integration (1) 	2	11	Erwin_Test								BO Reports Gustomer Order Entry
Carrefour (9)	3	12	New_Association	or Association	Source to Ta	rge Data Migrat					Data Lake
 Data Lake Migration (3) EDW (2) ERP (2) 	•		∢ ∢ R∈	ecords from 1 to	3 > >	I D Page 1	• 🗏 ²	15 rows per pag	•	•	Data Models EDW ErwinDIS
 Erwin_Project (2) Transformations Test Cases Mappings 	€	Test Case Ov	erview	Validation Step	s Dod	cument Upload	E	ixtended Prope	rties	•	
The project of t	#	Step Name	Step Type	Step Status	Description	Expected Res	ult A	ctual Result	Created By	Creat	Salesforce
K_New_Mapping (v1. ► Leter (2)										*	Code Mappings Catalogue 🔺
IQVIA (1)										.	Specification Artifact Catalogue 🔺
Published Mappings	•									•	Reference Table Catalogue

5. Click •.

The Add New Step page appears.



Field Name	Description								
Stop Namo	Specifies the unique name of the step.								
Step Name	For example, Validating Number of Columns.								
Validation Step	Specifies the type of the validation step.								
Туре	For example, Data Check.								
Stop Status	Specifies the status of the step.								
Step Status	For example, Passed.								
	Specifies the description about the validation step.								
Description	For example: This step validates the number of columns in the source								
	metadata.								
Expected Res-	Specifies the expected result in detail.								
ult	For example: The source table, dbo.ADS_ASSOCIATIONS should have								
	50 columns.								
Actual Result	Specifies the actual test result after the execution of the test.								
Actual Result	For example: The source table contains 50 columns.								
Expected Res-	Enter the expected result in detail, including the error-message that								
ult	is displayed on screen.								

Field Name	Description
Test Step Com- ments	Specifies the comments about the step.
	For example: The source metadata was scanned from a Sql Server
	database.

7. Click Save.

The validation step is added to the test case.

Adding Documents

You can add supporting documents such as text files, audio files, video files, and so on to a test case at:

Project-level

EDW (2)
 ERP (2)

Erwin_Project (2)

Test Cases

Exeter (2)

Erwin_Map (v1.04)

K_New_Mapping (v1.

Map-level

Adding Documents to Project-Level Test Cases

To add documents to project-level test cases, follow these steps.

1. In the Workspace Mappings pane, click the Test Cases node of a project.

Q 🗢 🛛 🛛

Created By

,

Administrator

DATA INTELLIGENCE SUITE Mappin	g Manag	ger			¢	Search
Workspace Mappings 🗸 🗸	Test C	Case Summary				
Mappings Transformations	€	۰				
Projects A_Project (2) A_Project (2) AdventureWorks_Migration (#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Descriptio
APJ_Demo (1)	1	9	T_Name			
 B_Project (2) BBT (1) BFSI Integration (1) 						
 Carrefour (9) Lata Lake Migration (3) 	•		K Kecords	s from 1 to 1 🔹 🔊 אן	Page 1 25 rows	per page

Validation Steps

T Name

Document Upload

Save

The Test Case Summary pane appears.

2. In the bottom pane, click **Document Upload** and click \bigcirc .

Test Case Overview

Test Case Id

Test Case Label

Test Case Name

The Add Test Case Document page appears.

Add Test Case Document	_ □ ×
	Save Cancel
Document Name*	Document Owner
Document Object	Drag-n-Drop files here or click to select files for upload.
Intended Use Description	
Approval Required Flag	

Field Name	Description								
Document Name	Specifies the name of the added document to the test case.								
	For example, Source Metadata Details.								
Document Object	ag and drop document files or use 😑 to select and upload doc-								
	uments.								
Document Owner	Specifies the document owner's name.								
Document Owner	For example, John Doe.								
	Specifies the URL of the document.								
Document Link	For example, https://drive.google.com/file/I/2sC2_SZIyeFKI7OOn-								
	b5YkMBq4ptA7jhg5/view								
Intended Use	Specifies the intended use of the document.								
Description	For example: The document has information about the source								
Description	metadata.								
Approval	Specifies whether the document requires approval.								
Required Flag	Select the Approval Required Flag check box to select the doc-								

Field Name	Description								
	ument status.								
	Specifies the status of the document.								
Document Status	For example, In Progress.								
Document status	This field is available only when the Approval Required Flag								
	check box is selected.								

4. Click Save.

The document is added to the test case and saved under the **Document Upload** tab.

DATA INTELLIGENCE SUITE Map	ping	Manage	er					ê Search	۹	۵	0 🗉
Workspace Mappings	•	Test Co	ase Summary								^
 Mappings Transformations 	^	€	⊕ ⊕								街 🗙
🔺 💶 Projects			Test Case Id	Test Case No	ame	Test Case Label	Type of Testing	Description	Created By		Created Do
ABC (2)											
🔁 Test Cases	L	1	5	Techpubs				1	Administrator		2020-09-1 -
▲ S Mappings Tech Pubs 2 (v1.00) TechPubs (v1.00) A Gfd (0)											•
🕂 Transformations		4									
🏷 Test Cases 🔜 Mappings					< <	Records from 1 to 1	>I D Page 1 .	25 rows per page			
 BigitalAdoption (0) B erwinDIS (5) 		4	Test Case Overview	Validation Ste	ps D	Occument Upload					•
Lineage Demo (12)		€									
 Project (4) project 1 (4) Project Tech Pubs (7) 		*	Document Name	1	Document Li	nk	Document Status	Intende	ed Use Description	Option	ns
Transformations		1	doc1				In Progress			B ,	/ x
Test Cases Mappings											

Once a supporting document is added, use the following options:

Preview(1)

Use this option to preview the document.

Edit (🖊)

Use this option to update the document details.

Delete(X)

Use this option to delete the document that is not required.

Adding Documents to Map-Level Test Cases

To add documents to map-level test cases, follow these steps.

- 1. In the **Workspace Mappings** pane, click a mapping and click the **Test Cases** node of a project.
- 2. Double-click a map-level test case.

The Test Overview page appears.

DATA INTELLIGENCE SUITE Mapping	Mana	ger							A Search		९ 🌣 🛛 🖪			
Workspace Mappings 🔹 👻	4	Mapping Spe	cification	Graphical Des	igner Te	t Specification	Wo	rkflow Log		•	Metadata Catalogue 🔍 👻			
Mappings		Test Case Id	Test Case	Test Case	T	Description	Del selle :	Test Case	o 100 🕹	×	Metadata Matadata Maradata Maradatata Maradatatatatatatatatatatatatatatatatatat			
 Projects A_Project (2) 	*	Test Case la	Name	Label	Type of Testing	Description	Priority	Status	Approved	Map	AdventureWorks			
AdventureWorks_Migration (AMERISURE Atlas Sales System			
 APJ_Demo (1) B_Project (2) 	1	9	T_Name								▶ ∰BI			
▶ BBT (1)	2	11	Erwin_Test								BO Reports			
 BFSI Integration (1) Carretour (9) 	3	12	New_Associatio	r Association	Source to Ta	ge Data Migrat					Customer Order Entry Data Lake			
 Data Lake Migration (3) EDW (2) ERP (2) 	•		< < Re	• •										
 Erwin_Project (2) Transformations Test Cases Mappings Image Trwin_Map (v1.04) 	•	Test Case Overview Validation Steps Document Upload Extended Properties												
MappingTargets	Te	st Case Id	11			External T	est Case le	d			▶ ■SAP ▶ ■T_New -			
K_New_Mapping (v1.	Te	Test Case Name* Erwin_Test									Code Mappings Catalogue			
▶ 📲 IQVIA (1) 👻	Te	st Case Label				Priority					Specification Artifact Catalogue			
Published Mappings	Ту	pe of Testing				Extendab	le 🗌				Reference Table Catalogue			

3. Click the **Document Upload** tab.

DATA INTELLIGENCE SUITE Mapping J	Manag	ler							Ą	Search	९ 🗘 🕻	98
Workspace Mappings 🛛 👻	4	Mapping Sp	ecification	Graphical D	Designer	Test Specificat	tion	Workflow Log		,	Metadata Catalogue	୍କ
Mappings	€	• • •	9						¢ 🥑	X	 Metadata 3rd Party Flat Files 	^
Projects A_Project (2) AdventureWorks_Migration (#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approved	Map/To		
APJ_Demo (1) B_Project (2) BBT (1)	1		T_Name							A	Atlas Sales System BI BI BO Reports	
 BFSI Integration (1) Carrefour (9) 	2		Erwin_Test	Records from 1 to	3	> D Page	1 =	25 rows per po		v →		
 Data Lake Migration (3) EDW (2) ERP (2) 	•	Test Case Or	• •	Validation Ste		Document Uple		Extended Pro	•	•	EDW erwinDIS	
 Erwin_Project (2) Transformations Test Cases 	€	-									JDEdwards JNew_Erwin ODS	
Mappings	#	Document	Name	Document Link		Document Stat	US	Intended Use Description	Ор	lions	PeopleSoft Salesforce	
 											 ▶ ■SAP ▶ ■T_New 	•
Exeter (2) GVIA (1)											Code Mappings Catalogue	•
• • • • • • • • • • • • • • • • • • •		ional Mapping								~	Specification Artifact Catalogue	•
Published Mappings	4 ^M	ap Spec Over	view Source	e Extract SQL	Target Upda	te Strategy	Testing N	lotes Map	Spec Docs	Assig 🖡	Reference Table Catalogue	-

4. Click •.

Add Test Case Document		_ 🗆 ×
	Save	ancel
Document Name*	Document Owner	
Document Object	Drag-n-Drop files here or click to select files for upload.	
Intended Use Description	👔 🛕 H 🛛 B J 😐 🗐 🦉 🗃 🗮 🗐 🗄 🗄 🖆 📽	
		•
Approval Required Flag		

The Add Test Case Document page appears.

Field Name	Description
	Specifies the name of the physical document being attached to the
Document Name	test case.
	For example, Source Metadata Details.
Decument Object	Drag and drop document files or use 📤 to select and upload doc-
Document Object	ument files.
Decument Owner	Specifies the document owner's name.
Document Owner	For example, John Doe.
	Specifies the URL of the document.
Document Link	For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-
	b5YkMBq4ptA7jhg5/view
Intended Use	Specifies the intended use of the document.
Description	For example: The document has information about the source
Description	metadata.

Field Name	Description
Approval	Specifies whether the document requires approval.
Approval Required Flag	Select the Approval Required Flag check box to select the doc-
Required ridg	ument status.
	Specifies the status of the document.
Document Status	For example, In Progress.
Document status	This field is available only when the Approval Required Flag
	check box is selected.

6. Click Save.

The document is added to the test case.

Once a supporting document is added, use the following options:

Preview(🕑)

Use this option to preview the document.

Edit (🖍)

Use this option to update the document details.

Delete(🗙)

Use this option to delete the document that is not required.

Managing Test Cases

Managing project-level or map-level test cases involve:

- Updating test cases
- Exporting test cases
- Deleting test cases

Managing Project-Level Test Cases

To update project-level test cases, follow these steps

To update test cases, follow these steps:

1. In the **Workspace Mappings** pane, click the **Test Cases** node.

DATA INTELLIGENCE SUITE Mapping	g Manager				🛕 Search	० 🗘	08
Workspace Mappings 🗸 🗸	Test Case Summary						^
		Test Case Name T_Name I< < Validation Steps	Test Case Label erwin Records from 1 to 1 Document Uplood	Type of Testing Production Validation Testing >>1 Page 1	Description Data integration projects for Erwin Sales. 25 rows per page	Created By Administrator	
Mappings Mappings KNew_Mapping KNew_Mapping Tidl_Map Finin_Subject {1} Evvin_Subject {1} Evvin_Subje	Test Case Id Test Case Label Test Case Name* Type of Testing Test SQL Script	26 erwin [_Name Production Validation T select * from dbo.ADS_	-				×

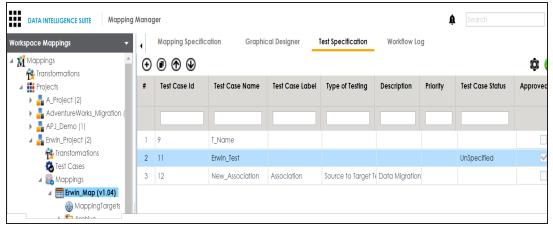
- 2. In the Test Case Summary pane, click the required test case.
- 3. In the Test Case Overview tab, click 🖉.
- Update the necessary information.
 For more information n fields, refer to Creating Test Cases topic.

To export a test case, click the test case in the **Test Case Summary** pane, and click **S**. To delete a test case, click the test case in the **Test Case Summary** pane, and click **S**.

Managing Map-Level Test Cases

To update map-level test case, follow these steps:

1. In the Workspace Mappings pane, click a map and click the Test Specification tab.



2. Click 🥑.

The Map and Test Cases Status page appears. You can update test case status in the Test Cases Grid and Map Test Status in the bottom pane.

J ^	Map and Test Case									
										¢ 💾 🛛
est	Cases Grid									
#	Test Case Label	Test Case Name	Test Case Status	Type of Testing	Description	Priority	Created By	Created On	Modified By	Modified On
		Erwin_Test	UnSpecified				Administrator	2019-11-11 12:52:19	Administrator	2019-11-12 17:10:
) Toet Statue									
ap) Test Status	_				_			_	
ap) Test Status	_								
ap				_				-		_
ap	D Test Status Map Tes	t Status : New	d Analysis			_	_		_	_
ap		t Status : New	d Analysis	•						
ар			,			- * = * = «		_		
ap	Map Tes		,		₹ ■ 1:: ::	= 1≘ 1≘ ◀	1	_	_	_
ap	Map Tes		,			= 1≡ 1≡ ◀	{	_		
ар	Map Tes		,		₩ ₩ 15 1	= 1≘ 1≘ ◀	/ 			_

To approve map-level test cases, follow these steps:

1. In the **Workspace Mappings** pane, click a mapping, and click the **Test Specification** tab.

orkspace Mappings 🛛 👻	4	Mapping Specifi	cation Graphi	cal Designer	Test Specification	Workflow Lo	9		
Mappings	€	• • •							¢
	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approve
A_Project (2)									
🕨 🚦 AdventureWorks_Migration (
🕨 📲 APJ_Demo (1)									
🔺 🖶 Erwin_Project (2)	1	9	T_Name						
💏 Transformations	2	11	Erwin Test					UnSpecified	
🇞 Test Cases			-						
🔺 🔜 Mappings	3	12	New_Association	Association	Source to Target T	Data Migration			

2. Click 🔯.

The Approved Test Cases page appears.

Test Cases Grid # Test Case Label Test Case		_		_			≝⊠
# Test Case Label Test Case							
	Name Test Case Status	Approved	Type of Testing	Description	Priority	Created By	Create
1 Erwin_Test						Administrator	2019-11

- 3. Select the check box against the test case under the **Approved** column.
- 4. Click Save.

To export a test case, click the test case in the **Test Case Summary** pane, and click **S**. To delete a test case, click the test case in the **Test Case Summary** pane, and click **S**.

Viewing Mapping Manager Dashboard

The Mapping Manager Dashboard displays metrics that help you analyze and track your projects and mappings. It presents this information using charts and graphs.

To access Mapping Manager Dashboard, follow these steps:

1. Go to Application Menu > Data Catalog > Mapping Manager.

Projec	t Summary		-
#	Project Name	Project Description	Project Ow
6	WhatfixIntegration	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top: -1000px;"></iframe>	^
7	ABC	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top: -1000px;"></iframe>	
8	TechPubs		
9	Tech Pubs Online	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top:</iframe>	-
•			•
Mappi	ing Manager Dashbo	ard	•

2. Click the Mapping Manager Dashboard pane.

The Mapping Manager Dashboard appears.

	Napping Manager Dashboard								•
	Statistics	Σ Projects: <u>16</u>	Σ Subjects: <u>0</u>	∑ Mappings: <u>86</u>	Σ Source Tables: <u>44</u>	Σ Target Tables: <u>46</u>	Σ Possible Truncations: <u>84</u>	Σ Users: <u>4</u>	ወ
	Mapping Summary	Mapping :	Status			Proactive Impact And	lysis - Truncation Impacts		^
		•••			-	•••			
	355 355 355 355 355 355 355			100%					
									_
25	20.						30		
20									
	12								
		4	7	6		43	3		.

It displays the following panes:

- Statistics: It displays a snapshot of statistics related to mapping projects.
- Mapping Summary: It displays the number of mappings in each project.
- Mapping Status: It displays the number of mappings in each mapping state.
- Proactive Impact Analysis Truncation Impacts: It displays the number of instances of source truncation in each project.
- <u>Project Overview</u>: It displays the number of subjects, mappings, and assigned users in each project.
- <u>Mapping Classification</u>: It displays the number of active, archived, and published mappings in each project.
- Mapping Assignments: It displays the number of designers, approvers, developers, and testers assigned to mappings
- <u>Sources/Targets Not Mapped</u>: It displays the number of sources and targets not mapped in each project.
- Test Case Status: It displays the number of test cases under a test case status.
- Project Test Cases: It displays the number of test cases in each project.
- User Test Cases: It displays the number of test cases created by each user.

Statistics

The Statistics pane displays the total number of projects, subjects, mappings, source tables, target tables, possible truncations, and users. For example, in the following image there are sixteen projects, eighty-six mappings, forty-four source tables, forty-six target tables, eighty-four possible truncations, and four users.

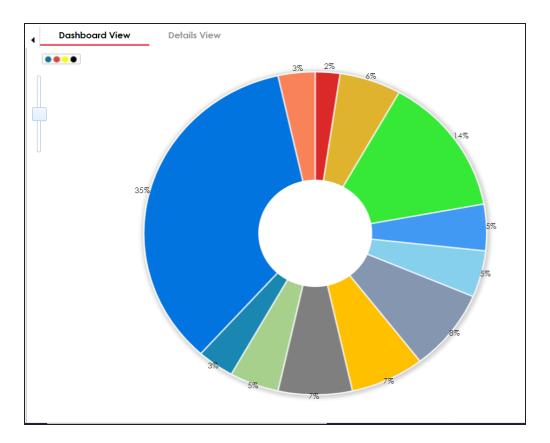
Statistics Σ Projects: 16 Σ Subjects: 0 Σ Mappings: 86 Σ Source Tables: 44 Σ Target Tables: 46 Σ Possible Truncations: 84 Σ Users: 4

You can click the hyperlink to view further details. For example, if you click the hyperlink for the Target Tables. The Target Table Details page appears.

📘 Targ	et Tables Details		
#	Table Name	Environment Name	System Name
1	Account	erwinSales	SQLTechPubs
2	Account	Presentation Layer	TABLEAU
3	Account	Presentation Layer	TABLEAU
4	Account	PRESENTATION LAYER	TABLEUAU
5	Account	TechPubs	PRESENTATION LAYER
6	Account	TechPubs	Salesforce
7	APPQOSSYS.WLM_CLASSIFIER_PLAN	TechPubs	Oracle
8	APPQOSSYS.WLM_CLASSIFIER_PLAN	TechPubs	Oracle

Mapping Summary

The Mapping Summary pane displays the number of mappings in each project in a pie chart. To open the chart in the Dashboard View, click the pie-chart.



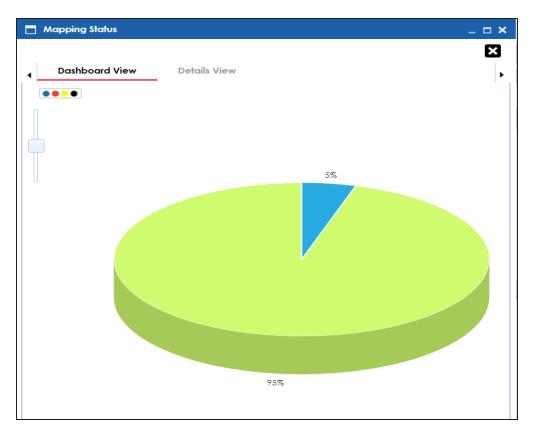
Each slice of the pie chart corresponds to a project. You can drill down and view detailed information in the list format. To view detailed information about mappings in a project, click a slice. The Details View tab opens. It displays project name, subject name, map name, and map version.

	Napping Summary			_ □ ×
4	Dashboard View	Details View		×
#	Project Name	Subject Name	Map Name	Map Version
1	<u>Lineage Demo</u>		Informatica m CBDR BDM CASA	1.00
2	<u>Lineage Demo</u>		Talend staging	1.00
3	<u>Lineage Demo</u>		<u>test</u>	1.00
4	<u>Lineage Demo</u>		<u>TestDataMap1</u>	1.00
5	<u>Lineage Demo</u>		<u>TestMap2</u>	1.00
6	Lineage Demo		<u>TestMap3</u>	1.00
7	Lineage Demo		Tech Pubs	1.00
8	Lineage Demo		Create a New Map	1.00
9	Lineage Demo		how	1.00
10	Lineage Demo		Account Tableau Report	1.02
11	<u>Lineage Demo</u>		Line Mapping	1.00
12	Lineage Demo		map map	1.00

Mapping Status

The Mapping Status pane displays the number of mappings under each mapping state in a pie chart. By default there are two mapping states, In Progress and Approved. You can create your own mapping states depending on your requirements. For more information on creating mapping states, refer to the <u>Configuring Mapping State Settings</u> topic.

To open the chart in the Dashboard View, click the pie chart.

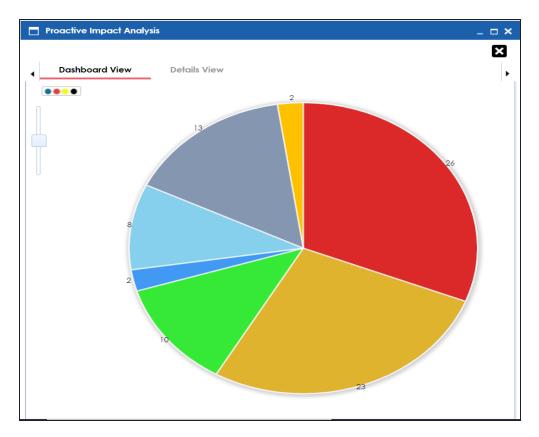


Each slice corresponds to a mapping state. You can drill down and view detailed information in the list format. To view detailed information about maps in a mapping state, click a slice of the pie-chart.

	Mapping Status				_ 🗆 ×
•	Dashboard View	Details View	_		×
#	Project Name	Subject Name	Map Name	Map Version	State Name
1	<u>erwinDIS</u>		Data Integration	1.00	Approved
2	<u>erwinDIS</u>		SalesforceIntegratic	1.00	Approved
3	<u>erwinDIS</u>		<u>BugTrial</u>	1.00	Approved
4	<u>erwinDIS</u>		erwinSalesIntegratic	1.01	Approved

Proactive Impact Analysis - Truncation Impacts

The Proactive Impact Analysis - Truncation Impacts pane displays the number of instances where the target column length is smaller than the source column length in each project in a pie-chart. To open the chart in the Dashboard View, click the pie chart.



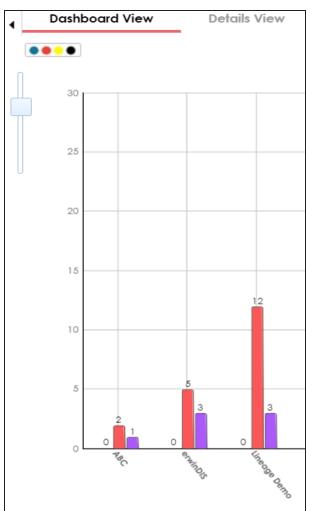
Each slice of the pie chart corresponds to a project. You can drill down and view detailed information in the list format.

To view detailed information about truncated sources in a project, click a slice of the pie chart. The Details View tab opens. It displays project name, subject name, map name, source and target column names.

4	Dashboard View	Details View										
#	Project Name	Subject Name	Map Name	Source Table Name	Target Table Name	Source Column Name	Target Column Name	Source Column Length	Source Column Precision	Target Column Length	Target Column Precision	Map Versior
1	Test Source		mp STGTPCH SF10000	TPCH_SF10000.LINEITEN	stg.STG_LINEITEM	L_LINENUMBER	UNEITEM_HSH	38		16		1.00
2	Test Source		mp STGTPCH SF10000	TPCH_SF10000.LINEITEN	stg.STG_LINEITEM	L_LINENUMBER	UNEITEM_HSH_DIFF	38		16		1.00
3	Test Source		mp STGTPCH SF10000	TPCH_SF10000.LINEITEN	stg.STG_LINEITEM	L_ORDERKEY	TPCH_SF10000.ORDER:	38		16		1.00
4	Test Source		mp STGTPCH SF10000	TPCH_SF10000.LINEITEN	stg.STG_LINEITEM	L_PARTKEY	TPCH_SF10000.PART_H	38		16		1.00

Project Overview

The Project Overview pane displays the number of subjects, mappings, and assigned users in each project in a bar graph. To open bar graph in the Dashboard View, click the bar graph.



Each set of three bars corresponds to a project. You can view detailed information in the list format. To view the Detailed information about mappings, subjects, or assigned users of a project click the corresponding bar. For example, if you click the mappings bar then the Mappings tab opens.

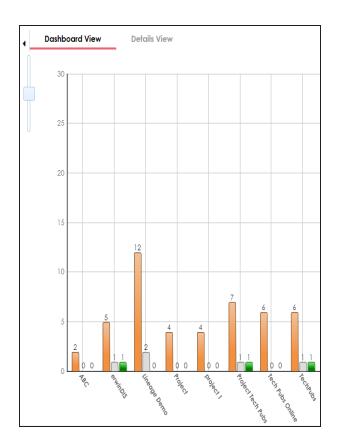
4	D	ashboard View	Details Viev	N		
•	N	\appings	Subjects A	Assigned Users		
	#	Project Name		Subject Name	Map Name	Map Version
	1	<u>erwinDIS</u>			Data Integration	1.00
	2	<u>erwinDIS</u>			SalesforceIntegration	1.00
	3	<u>erwinDIS</u>			<u>BugTrial</u>	1.00
	4	<u>erwinDIS</u>			TechPubsBUgTrial	1.00
	5	<u>erwinDIS</u>			<u>erwinSalesIntegration</u>	1.01

To view a list of subjects, click the **Subjects** tab.

To view a list of the assigned users, click the Assigned Users tab.

Mapping Classification

The Mapping Classification pane displays the number of active, archived, and published mappings in each project in a bar graph. To open the bar graph in the Dashboard View, click the bar graph.



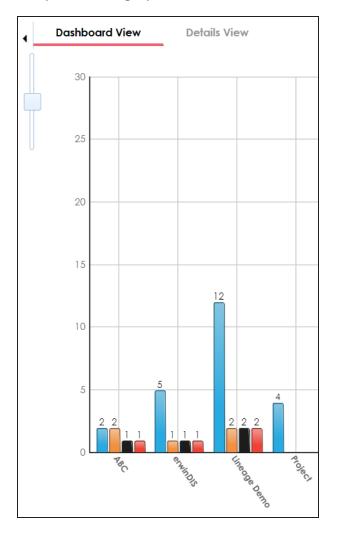
Each set of three bars corresponds to a project. You can drill down and view detailed information. To view detailed information about status of mappings in a project, click a bar. The Details View tab opens. It displays project name, subject name, map name, map version, and status.

€ Da	shboard View Details View					
#	Project Name	Subject Name	Map Name	Map Version	Status	Map Published
1	erwinDIS		BugTrial	1.00	Active	
2	erwinDIS		Data Integration	1.00	Active	
3	erwinDIS		erwinSalesIntegration	1.00	Passive	
4	<u>erwinDIS</u>		<u>erwinSalesIntegration</u>	1.01	Active	
5	erwinDIS		SalesforceIntegration	1.00	Active	
6	erwinDIS		TechPubsBUgTrial	1.00	Active	

Mapping Assignments

The Mapping Assignments pane displays the number of designers, approvers, developers, and testers assigned to mappings in each project in a bar graph. For more information on mapping assignments, refer to the <u>Assigning Mapping Specifications to Users</u> topic.

To open the bar graph in the Dashboard View, click the bar graph.

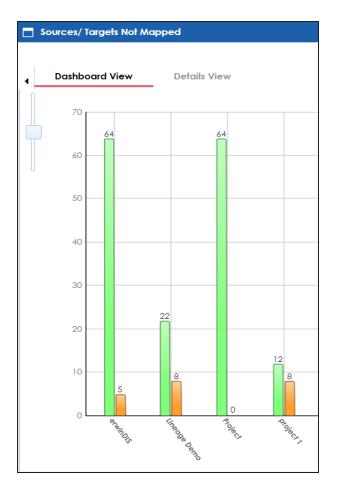


Each set of three bars corresponds to a project. You can drill down and view detailed information in the list format. To view detailed information about mapping assignments in a project, click a bar. The Detail View tab opens. It displays project name, subject name, map name, assigned user's full name, and assignment status.

•	Dashboar	d View	Details View	/				
#	Project Name	Subject Name	Map Name	Map Descriptio	Assigne Full Name	Responsib	Assignme Status	Last Modified By
1	<u>erwinDIS</u>		Data Integ		Administrat	Mapping D	In Progress	Administrator
2	<u>erwinDIS</u>		<u>Salesforcel</u>		Administrat	Mapping D	In Progress	Administrator
3	<u>erwinDIS</u>		<u>BugTrial</u>	Testing for (Saras Ojha	Mapping A	Not Startec	Administrator
4	<u>erwinDIS</u>		<u>BugTrial</u>	Testing for (Administrat	Mapping D	In Progress	Administrator
5	<u>erwinDIS</u>		BugTrial	Testing for (Jane Doe	Mapping E	Not Startec	Administrator
6	<u>erwinDIS</u>		<u>BugTrial</u>	Testing for (public - De	Mapping Te	Not Startec	Administrator
7	erwinDIS		TechPubsBI	TechPubsBl	Administrat	Mapping D	In Progress	Administrator
8	<u>erwinDIS</u>		<u>erwinSalesl</u>		Administrat	Mapping D	In Progress	Administrator

Sources/Targets Not Mapped

The Sources/Targets Not Mapped pane displays the number of sources and targets not mapped in each project in a bar graph. To open the bar graph in the Dashboard View, click the bar graph.

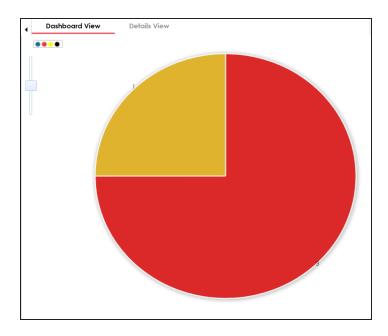


Each set of two bars corresponds to a project. You can drill down and view detailed information in the list format. To view the detailed information about sources and target not mapped in a project, click a bar. The Details View tab opens. It displays project name, map name, and target and source details.

•	Dashboard View	Details View						•
•	Targets Not Mapped	Sources	Not Mapped					•
#	Project Name	Subject Name	Map Name	Target System Name	Target Environment Name	Target Table Name	Target Colur Name	mn
1	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	SQN_NUM	
2	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	LOAD_DTS	
3	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	REC_SRC	
4	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	MLTID	
5	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	BKCC	
6	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	BWSC	
7	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	SQN_NUM	
8	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	LOAD_DTS	
9	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	REC_SRC	
10	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	MLTID	
11	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	вксс	
12	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	BWSC	
13	Lineage Demo		<u>map map(1.00)</u>	erwin DM	DM Landing	Citizens	CitizenID	

Test Case Status

The Test Case Status pane displays the number of test cases under a test case status in a pie chart. To open the chart in the Dashboard View, click the pie chart.

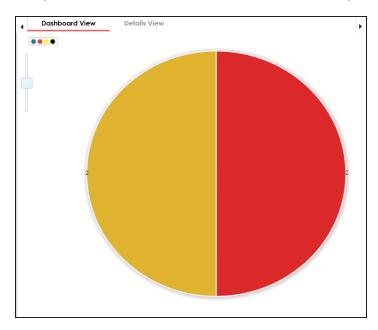


Each slice of the pie chart corresponds to a test case status. You can drill down and view detailed information in the list format. To open the detailed information about test cases, click a slice. The Details View tab opens. It displays project name, map name, and test case names.

4	Dashboard Viev	w Details V	liew			•
#	Project Name	Subject Name	Map Name	Test Case Id	Test Case Name	Test Ca Label
1	<u>Lineage Demo</u>			3	ETL Testing	Alpha
2	<u>Lineage Demo</u>		Account Tableau	4	Account_Tak	
3	<u>erwinDIS</u>			1	Validating sc	Alpha

Project Test Cases

The Project Test Cases pane displays the number of test cases in each project in a pie-chart. To open the chart in the Dashboard View, click the pie chart.



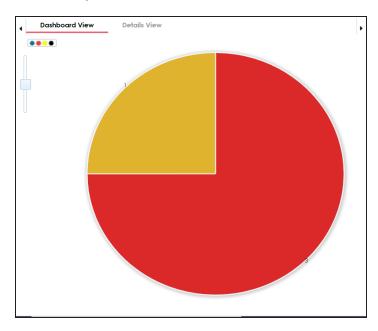
Each slice in the pie chart corresponds to a project. You can drill down and view detailed information in the list format.

To view the detailed information about test cases in a project, click a slice of the pie chart. The Details View tab opens. It displays project name, subject name, map name, test case ID, test case name, and test case label.

4	Dashboard View	Details View	_			•
#	Project Name	Subject Name	Map Name	Test Case Id	Test Case Name	Test Case Label
1	<u>erwinDIS</u>			1	Validating sour	Alpha
2	erwinDIS		Data Integration	2	Customer-Acc	Alpha

User Test Cases

The User Test Cases pane displays the number of test cases created by each user in a piechart. To open the chart in the Dashboard View, click the pie chart.



Each slice of the pie chart corresponds to a user. You can drill down to view detailed information in the list format.

To view the detailed information about test cases created by a user, click a slice of the piechart. The Details View tab opens. It displays project name, subject name, map name, test case ID, test case name, and test case label.

•	Dashboard View	Details View				•
#	Project Name	Subject Name	Map Name	Test Case Id	Test Case Name	Test Case Label
1	<u>Lineage Demo</u>			3	ETL Testing	Alpha
2	erwinDIS			1	Validating sour	Alpha
3	erwinDIS		Data Integration	2	Customer-Acco	Alpha