

# erwin Data Intelligence Suite

# **User Guide**

Release v10.1

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## Introduction

erwin Data Intelligence Suite (DI Suite) is a unified platform for data professionals that offers metadata-driven framework to:

- Discover data: Identify metadata from isolated data management sources
- Harvest data: Automate metadata collection from the isolated data management sources, and consolidate it into a single source
- Structure and deploy data sources: Connect physical metadata to specific data models, business terms, definitions, and reusable design standards
- Analyze metadata: Analyze the harvested data to understand its attributes and relation to business
- Map data flows: Identify data integration possibilities, and track its flows and transformations
- Govern data: Develop a governance model to manage standards, policies, and best practices, and associate them with physical assets.
- Socialize data: Empower stakeholders with role-based data availability in one place

This section introduces you to <u>erwin DI Suite architecture</u>, its <u>user interface (UI)</u>, and the tasks that you can accomplish using it.

## Architecture

To get you started with erwin Data Intelligence Suite (DI Suite), this topic gives you an overview of erwin DI Suite architecture and its modules. The following diagram shows a highlevel architecture and data flow.



The following sequence gives a high-level understanding of how the modules interact in a typical data integration project:

- 1. Scan metadata from data sources.
- 2. Create business assets and associate them with technical assets.
- 3. Create source data to target data maps, and track data flow and transformations.
- 4. Capture functional requirements.
- 5. Associate requirements with mappings.
- 6. Define codesets and perform code crosswalks (mappings).
- 7. Associate code crosswalks with mappings.

- 8. Validate and manage reference data.
- 9. Associate reference data with Mappings.
- 10. Generate code for:
  - ETL jobs
  - SQL scripts
  - Python code
  - Spark code
  - DDL scripts
  - Stored procedures

erwin DI Suite consists of 11 modules that are categorized as core and add-on modules.

- Core modules perform the major functions of erwin DI Suite offering.
- Add-on modules offer additional functions on top of the core functions. The availability of add-on modules is subject to licensing.

5 5	The following table gives an overview of modules and their functions.
-----	---

Module	Туре	Function
Resource	Core	Use the Resource Manager to add application users and create roles
Manager	CUIE	for them here. You can also manage access-level permissions.
Metadata Manager	Core	Use the Metadata Manager to harvest source or target metadata from a data source. You can run impact and lineage analysis to have better control on a data integration project.
Mapping Man- ager	Core	Use the Mapping Manager to perform source to target mappings. You can also link code mapping objects, reference data objects, and requirements to the mappings.
Codeset Man-	Add-	Use the Codeset Manager to manage your enterprise and legacy code-
ager	On	sets. You can perform code mappings (crosswalks) and manage them.
Reference Data Man- ager	Add- On	Use the Reference Data Manager to manage your reference data (tables). You can run validation rules on the reference data and per- form data quality checks. Further, you can associate codesets with the reference data.

Module	Туре	Function
		Use the Business Glossary Manager to create, manage, and col-
Business Gloss	Add-	laborate on common business vocabulary across the organization. You
ary Manager	On	can also view lineage maps to understand how semantic definitions are
		related to physical data dictionaries, data mappings, and data lineages.
Poquiromonto	۸dd	Use the Requirements Manager to standardize functional require-
Managor	Auu-	ments documentation. Further, you can link requirements with data
wanager	On	mappings.
Test Manager	Add-	Use the Test Manager to manage test specifications created under
	On	Metadata Manager and Mapping Manager.
Release Man-	Add-	Use the Release Manager to release data mappings, database objects,
ager	On	and release notes to standardize the release process.
Reports Man-	Add-	Use the Reports Manager to create statistical reports and evaluate
ager	On	your team's productivity.
	Add- On	Use the Workflow Manager to manage Business Glossary Manager,
Managar		Metadata Manager, and Mapping Manager workflows. You can also
Ividiager		create custom workflows and monitor their execution.

For more information on erwin DI Suite's user interface, refer to the <u>User Interface</u> topic.

### **User Interface**

To get you started with using erwin Data Intelligence Suite (DI Suite), this topic walks you through the erwin DI Suite UI, its components, and their functions.

Once you have installed erwin DI Suite, follow these steps to access and use it:

1. Start erwin DI Suite.

The Login page appears. It displays your license information at the top-right corner of the page.

- 2. Enter your credentials.
- 3. Select the I accept & agree to the terms of the EULA check box.
- 4. Click Sign In.

After a successful log in, the following page appears.

**Note**: By default the landing module is set to the Mapping Manager. You can change this under your <u>account settings</u>.

space Mappings	2 Pro	ject Summary						
Mappings	#	Project Name	Project Description	Project Owner	Subjects Count	Mapping Count	Created By	Created Date Time
ABC (2)								
<ul> <li>adgfd (0)</li> <li>adgitalAdoption (0)</li> </ul>	1	Lineage Demo			0	12	Administrator	2020-02-26 04:01:32.913
🕨 📲 erwinDIS (5)	2	Test Source			0	3	Administrator	2020-02-26 04:02:38.7
Lineage Demo (12)	3	TestData Map			0	30	Administrator	2020-02-26 04:03:32.1
<ul> <li>Froject (4)</li> <li>project 1 (4)</li> <li>project 1 (4)</li> <li>project Tech Pubs (7)</li> <li>Tech Pubs Online (6)</li> <li>Tech Pubs (6)</li> <li>Test 4(4)</li> <li>Test Source (3)</li> <li>TestMap (3)</li> <li>TestMap (3)</li> <li>Whatfixthial (0)</li> </ul>	4	TestMap			0	3	Administrator	2020-02-26 04:04:19.267
	5	WhatfixTrial			0	0	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;"&gt;</iframe>		o	0	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;"&gt;</iframe>		o	2	Administrator	2020-03-17 05:34:23.3
	8	TechPubs			0	6	Administrator	2020-04-15 09:56:37.803
	9	Tech Pubs Online	<pre>«iframe id="editorembed" tabindex="-1" style="position: absolute: width: 0px; height: 0px; border; none; left: -1000px; top: </pre>		0	6	Administrator	2020-04-23 07:28:42.863
							_	•
	Mo	pping Manager Dashbo	ard					

UI Section	Function
1-Navigation	<b>Application Menu</b> : Click this icon to access modules of erwin DI Suite.

UI Section	Function
	For more information, refer to the Application Menu section.
	A Messaging Center: Click this icon to view notifications and messages.
	${f Q}$ Search: Use this feature to search for a keyword based on the module
	that you are working in.
	Search Options: Click this icon to set the search criteria.
	Help: Click this icon to access the context sensitive help.
	Bookshelf: Click this icon to access the erwin DI Suite bookshelf.
_	<b>Options</b> : Click this icon to manage your profile options.
Pane	<ul> <li>Suggestions: Send an enhancement request to our team through an</li> </ul>
	email.
	Change Password: Change your password.
	<ul> <li>My Dashboard: View your activity report and mapping assign- ments.</li> </ul>
	My Profiles: View your profiles.
	My Workflow: View and update your workflow queues.
	Logout: Log out of the application.
2-Workspace Mappings	Use this pane to browse and work on different projects and mappings.
3-Published Map-	Use this pane to browse through published mappings and export them, if
pings	needed.
4-Central Pane	Based on your selection in the Workspace Mappings pane, use this pane
	to view or work on the data.
5-Mapping Man-	Use this pane to view statistics related to mappings and projects in the
ager Dashboard	Mapping Manager.

## **Application Menu**

To access the Application Menu, click

Data Catalog	Met	adata Manager	nent	Reference Da	ata Management
Data Literacy	Resource Manager	Metadata Manager	Mapping Manager	Codeset Manager	Reference Data Manager
Left Pane			Right Pa	ine	
	Life	cycle Managen	nent		
Miscellaneous	Requirements Manager	Release Manager	Test Manager		

The Application Menu has two sections, left and right panes. The left pane displays categories of modules. Hovering over a category displays its modules in the right pane.

Category	Modules			
Data Catalog	<ul> <li>Resource Manager</li> </ul>			
	<ul> <li>Metadata Manager</li> </ul>			
	<ul> <li>Mapping Manager</li> </ul>			
	<ul> <li>Codeset Manager</li> </ul>			
	<ul> <li>Reference Data Manager</li> </ul>			
	<ul> <li>Requirements Manager</li> </ul>			
	<ul> <li>Release Manager</li> </ul>			
	<ul> <li>Test Manager</li> </ul>			
	<ul> <li>Business Glossary Manager</li> </ul>			
Data Literacy	<ul> <li>Business User Portal (BUP) instance integrated with the erwin</li> </ul>			
	DI Suite			
	<ul> <li>AIMatch</li> </ul>			
Automation	Automation Framework			
Miscellaneous	<ul> <li>Reporting Manager</li> </ul>			

Category	Modules			
	<ul> <li>Workflow Manager</li> </ul>			
	<ul> <li>Download Template</li> </ul>			
	<ul> <li>Plugins</li> </ul>			
	<ul> <li>Settings</li> </ul>			

## **Quick Start**

This section gives a quick hands-on experience of erwin Data Intelligence Suite (DI Suite). It walks you through the operations that you would perform regularly and helps you understand Metadata Management, Mapping Management, Data Literacy, Data Governance, and Life Cycle Management.

The following are the tasks that you would be performing regularly in a data integration project.

#### **Resource Management**

Creating Roles

Creating Users and Assigning Roles

### Metadata Management

<u>Creating Systems</u> <u>Creating Environments</u> <u>Scanning Metadata</u> <u>Performing Lineage Analysis</u> Performing Impact Analysis

### **Data Literacy**

<u>Creating Business Terms</u> Defining Associations for Business Terms

### **Reference Data Management**

Categorizing Codesets and Defining Code Values
Publishing Codesets
Creating Code Crosswalks (Mappings)

### Life Cycle Management

Documenting Requirements Creating Test Cases

### **Mapping Management**

Creating Projects and Maps Defining Transformations Mapping Source and Target Associating Code Crosswalks with Data Item Mappings Linking Requirements to Mappings Exporting Mapping Specifications to ETL Tools

## **Creating Roles**

Roles are used to assign access-level permissions to users. While a few roles are available by default in erwin DI Suite, you can create your own roles using the Resource Manager.

To create roles, follow these steps:

- 1. Go to Application Menu > Data Catalog > Resource Manager.
- 2. Click Roles.
- 3. Right-click the Roles node.



4. Click New Role.

The New Role page appears.

DATA INTELLIGENCE SUITE	esource Manager		0	8
Users Roles Profiles				•
Roles Tree 🗸	New Role			>
Roles     Color       Image: Solution of the second	New Role Role Name* Role Description Permissions Tree	Note: Role Name once created cannot be edited    Permissions  Permissions Permissions Permissions  Permissions Permissions Permissions Permissions Permissions Permissions Permissions Permissions Permissions Permissions Perm		> 
	4	Comparison of the compari		<b>.</b> →

5. Enter Role Name and Role Description.

For example:

- Role Name Mapping Admin
- Role Description The role has access to Resource Manager, Metadata Manager, and Mapping Manager.
- 6. Under the **Permissions Tree**, select the check box against the modules or the permission object to which you want to grant access to the role.
- 7. Click 💾.

A role is created and added to the Roles tree.

DATA INTELLIGENCE SUITE Re	source Manager		0	8	1
Users Roles Profiles					•
Roles Tree <	View Role			>	
Construction Cons	Role Name Role Description	R_Name			-
public     IR Name     System Admin     Tester     Transformation Admin	Permissions Tree	Image: Permissions         Image: Permissions			

Once roles are created, you can create users and assign roles to them. For more information on managing resources, refer to the <u>Managing Resources</u> section.

## **Creating Users and Assigning Roles**

Users are used to grant members of your team access to erwin DI Suite and your projects. While a few users are available by default, you can create as many users as you need using the Resource Manager. While you create users, you also assign them roles to define their access-level permissions.

Note: The Administrator user is system-generated and cannot be edited or deleted.

To create a user, follow these steps:

- 1. Go to Application Menu > Data Catalog > Resource Manager.
- 2. Right-click the **Users** node.

	source Manager	
Users Roles Profiles		
Users Tree 🗸	User Details User Acc	ount Activities User Assignments
😰 Settings		
Users		
a 🚵 New User	User Type	Database
	UserID	abo
	05el ID	
idenver	User Full Name	qwerty
🧕 jdoe	Paraword	•••••
🧕 ks123		
🧕 M.Samuel	Mobile	
🧕 mboggs	Company Title	
🔍 mread	Company lille	

3. Click New User.

The New User page appears.

DATA INTELLIGENCE SUITE Ru Users Roles Profiles s Tree <	New User					0 E
Serings     User     Serings     Serings     Serings     Serings     Serings     Sering     Sering	UserType UserID* UserFul Nome* Postword* Mobile Company Tifle Default Role Landina Module	Dotoboxe	Telephone Number Email D <sup>**</sup> Altenate felephone Number Monoger Nome Compony Send Email Theme Langaoge Perference			
	Use Roler" Available Roles Administrator EL: Developer Mosping Deligner Methol AR, READ Prover User Project Admin public System Admin Tester Tenteformation Admin	Asigned Roles	Uter Image	Drag n Drop files here or click to select files for upload.	ŧ	

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
User Type	Specifies whether the user type is Database, LDAP, or SAML.
	For example, Database.
User ID	Specifies the user name of the user to log on to erwin DI Suite.
	For example, janedoe.
User Full	Specifies the user's full name.
Name	For example, Jane Doe.
	Specifies the password to log on to erwin DI Suite.
Password	For example, Janedoe@1.
1 435 101 4	The Administrator provides a default password, which can be changed
	later.
Mobile	Specifies the user's valid mobile number.
	For example, +658374414288.
Company	Specifies the user's company title or designation.

Field Name	Description	
Title	For example, Data Administrator.	
Default	Specifies the default role of the user.	
Role	For example, Mapping Admin.	
!	Specifies the landing module for the user.	
Landing	For example, Mapping Manager.	
would	The Landing Module is the first page displayed on logging on.	
	Select roles under Available Roles and move them to Assigned Roles using	
	the arrows (🔿 🐡). Similarly, to change existing role assignment, select	
Lisor Polos	roles under Assigned Roles and move them back to Available Roles using	
USEI NOIES	the arrows (🚧 🗰).	
	For more information on adding a new role under the Available Roles list-	
	box, refer to the <u>Creating Roles</u> topic.	
Telephone	Specifies the valid telephone number of the user.	
Number	For example, 1-800-783-7946.	
Email ID	Specifies the user's email address.	
	For example, jane.doe@mauris.edu	
Alternate	Specifies the user's valid alternate telephone number.	
Number	For example, 1-802-456-7946.	
Manager	Specifies the name of the user's reporting manager.	
Name	For example, John Doe.	
Company	Specifies the name of the user's company.	
Company	For example, ABC Consulting Services.	
Send Email	Specifies whether to send email to the user's email ID.	
	Select the Send Email check box to send an email notification to the	
	user's email ID. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.	

Field Name	Description
Thoma	Specifies the theme for the user to set the appearance of erwin DI Suite.
meme	By default, it is set to erwin (Web Blue).
	Specifies the language preferred by the user.
Language	For example, English.
Preference	For more information on language settings, refer to the Configuring Lan- guage Settings topic.
Lleen	Specifies the physical image file being attached to the user.
User Image	Drag and drop a user's image or click 😑 to browse and upload a picture.

## 5. Click 💾.

A new user is created and added to the Users tree.

For more information on managing resources, refer to the <u>Managing Resources</u> section.

## **Creating Systems**

You can harvest (scan) metadata from data sources in the Metadata Manager. The scanned metadata is stored in a hierarchical manner (System > Environment > Table > Column) in the System Catalogue.

A System can contain multiple environments and in a typical data integration project a system can be a source or target type. You can create a system and specify data steward, system owner, and its business purpose etc.

To create systems, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the System Catalogue pane, right-click the Metadata node.



#### 3. Click New System.

The New System page appears.

ቯ New System					>
↓ System Details Miscellaneo	us			Next	Save & Exit Cancel
System Name*			Primary Move Type(Source/Target)		
Data Steward	-Select Data Steward-		DQ Score	Select	¥
Business Purpose	🕅 <u>А</u> <u>Н</u> В <i>I</i> <u>U</u>	E = 3	≣ 1≣ 1≣ 1≣ 1		
					*
Server Platform			Server OS Version		
DBMS Platform			DBMS Version		
File Management Type			File Location		
Owner Name			Release		
Telephone Number			Email Address		

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	lame Description	
	Specifies the physical name of the system.	
System Name	For example, Enterprise Data Warehouse.	
System Name	For more information on naming conventions, refer to the <u>Best</u>	
	Practices section.	
	Specifies the name of the data steward responsible for the sys-	
	tem.	
Data Steward	For example, Jane Doe.	
	For more information on configuring list of data stewards, refer	
	to the <u>Configuring Data Stewards</u> topic.	
	Specifies the business objective of the system.	
Business Purpose	For example: This is a source system to store Sales metadata of	
	the organization for a data integration project.	
Sonver Blatform	Specifies the server platform of the system.	
	For example, Windows.	

Field Name	Description
	Specifies the DBMS platform of the system (if the system is an
DBMS Platform	RDBMS source).
	For example, SQL Server.
File Management	Specifies the file management system (if the system is a file-
	based source).
Туре	For example, MS Excel.
Owner Name	Specifies the full name of the system owner.
Owner Name	For example, Talon Smith.
	Specifies the telephone number of the system owner.
	For example, 1-800-783-7946.
	Specifies whether the system is source, target, or both.
	Valid values are:
Primary Move Type	<ul> <li>Source</li> </ul>
(Source/Target)	<ul> <li>Target</li> </ul>
	<ul> <li>Both</li> </ul>
	Specifies the overall data quality score of the system.
DO Score	For example, High (7-8).
	For more information on configuring DQ scores, refer to the
	Configuring Data Profiling and DQ Scores topic.
Sorver OS version	Specifies the OS version of the system's server.
	For example, Windows Server 2012 R2.
	Specifies the DBMS version of the system (if the system is an
DBMS Version	RDBMS source).
	For example, SQL Server 2017.
File Location	Specifies a file path (if the system is a file-based source).
	For example, C:\Users\Talon Smith\erwin\Mike - Target System
	Specifies the system release including the point release num-
Release	ber.
	For example, Oracle 18c.

Field Name	Description
	Specifies the system owner's email address.
Email Address	For example, talon.smith@mauris.edu

5. Click the **Miscellaneous** tab and 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
ESB Platform	Specifies the enterprise platform bus type (if the system is an ESB source).
туре	For example, Mule.
ESB Q Man- ager Name	Specifies the ESB queue manager's name of the system (if the source is an ESB). For example, John Doe.
Total DBSize	Specifies the total physical size of the database. For example, 198 GB.
Total Number of Tables	Specifies the total number of tables associated with the system. For example, 300.
Definition of the day	Specifies the definition of the system at the end of the day. For example: Extraction of details from the source system is com- plete.
Batch Extract Window	Specifies the daily batch extract window of the system. For example: Batch extract from the source system is scheduled at 3:30 P.M. everyday.
Average User	Specifies the average number of system users. For example, 30.
Average Con- current Users	Specifies the average number of concurrent system users. For example, 15.
Sensitive Data Indicator (SDI) Flag	Specifies whether the system is sensitive. Switch <b>Sensitive Data Indicator (SDI) Flag</b> to 🔒 to mark the system sensitive.
Sensitive Data	Specifies the SDI classification of the system.

Field Name	Description
	For example, PHI.
Indicator (SDI)	This list is enabled when Sensitive Data Indicator (SDI) Flag is
Classification	switched to 🔒. For more information on configuring SDI clas-
	sifications, refer to the Configuring Sensitivity Classifications topic.
Sensitive Data Indicator (SDI) Description	Specifies the description of the SDI classification.
	For example: Protected Health Information.
	It is enabled when Sensitive Data Indicator (SDI) Flag is switched to
	💼. The field autopopulates based on the SDI Classification.
Special Instruc- tions	Specifies any special instructions or comments about the system.
	For example: The system acts as a source for creating the mapping
	specification.

#### 6. Click Save and Exit.

A new system is created and added under the system tree.

Once a system is created, you can create environments under it and scan metadata from different database types. For more information on managing metadata, refer to the <u>Managing</u> <u>Metadata</u> section.

## **Creating Environments**

After creating a system in the Metadata Manager, you can create environments under the system. An environment can be created for different database types and flat files by ful-filling prerequisites and providing the connection parameters.

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the System Catalogue pane, right-click a system.

The available options appear.

	DATA INTELLIGENCE SUITE Metadata /	Manage	r		
Syste	m Catalogue 💦 🔍 🗸	- L	Data Dictionary §	ystem Details Asso	ciations Mind Map
Þ	B_System	Enviro	nment Listing		
►	EI BI				
►	BO Reports	#	Environment Name	Environment Type	DBMS Name
►	Customer Order Entry				
►	🗐 Data Lake				
►	🔲 Data Models	1	Data Miaration	Production	ErwinDIS931
►	EDW .	2	enwinDIS	test	EnvinDIS931
►	erwinDIS	2		1031	
►	🗐 JDEdwar 🌉 New Environment			Test	erwinDG_V9_GA
►	MANTA 😑 New Document				
►	🗐 Nasdaq 📝 Edit System				
►	New_Erw Delete System				
►	• New_Sys				
►	ODS Report - System Information				
►	🗐 PeopleSt 📊 Report - Data Dictionary				
►	🗐 Salesforc 🛠 Run Template				
►	SAP Configure Expanded Logical Name				
Þ	Scotia 2. View Workflow				
►	T_New	_			
b.	Teradata				

3. Click New Environment.

The New Environment page appears.

System Environment Name*   System Environment Type*   Data Steward   Server Platform   Server Platform   Server OS Version   File Management Type   File Location   Production System Name   Choose Production System   Production System Name   Version   100   Version Label   Associated Business Term   DataSose Type*	New Environment     Configuration Details	Miscellaneous		
System Environment Type* Data Steward Apply To All Table: & Column: Server Platform Server OS Version File Management Type File Location Production System Name Choose Production System Production System Name Choose Production System Version Location Locat	System Environment Name*			
Data Steward -Select Data Steward-   Apply To All Tables & Columns   Server Platform   Server OS Version   File Ivanagement Type   File Location   Production System Name   Choese Production System   Production Environment Name   Version   1.00   Version Lobel   Associated Business Term   DQ Score   -Select DQ Score-   DataBase Type*	System Environment Type*			
Server Plotform   Server OS Version   File Management Type   File Location   Production System Name   Production System Name   Version   100   Version Label   Associated Business Term   DQ Score   Select DataBase   DataBase Type*	Data Steward	-Select Data Steward-  Apply To All Tables & Columns		
Server OS Version   File Management Type   File Location   Production System Name   Choose Production System   Production System Name   Ochoose Production System   Version   1.00   Version Label   Associated Business Term   DQ Score   Select DQ Score-   DataBase Type*	Server Platform			
File Management Type	Server OS Version			
File Location   Production System Name   Production System Name   Production Environment Name   Version   1.00   Version Label   Associated Business Term   DQ Score   -Select DQ Score-   DateBase Type*   -Select DataBase-	File Management Type		Please Select DataBase Type	
Production System Name     Choose Production System       Production Environment Name     •       Version     1.00       Version Label     •       Associated Business Term     ••••••••••••••••••••••••••••••••••••	File Location			
Production Environment Name        Version     1.00       Version Label        Associated Business Term        DQ Score     -Select DQ Score-       DataBase Type*     -Select DataBase-	Production System Name	Choose Production System 🔹		
Version     1.00       Version Label	Production Environment Name	Ψ.		
Verion Label Associated Business Term DQ Score -Select DQ Score- DataBase Type* -Select DataBase-	Version	1.00		
Associated Business Term DQ Score Select DQ Score  DataBase Type* Select DataBase	Version Label			
DQ Score	Associated Business Term	<b>•€ ×</b>		
DataBase Type*	DQ Score	-Select DQ Score-		
	DataBase Type*	-Select DataBase-		
•				

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 unique name of the environment.
System Envir-	For example, EDW-Test.
onment Name	For more information on naming conventions, refer to the Best
	Practices section.
System Envir-	Specifies the type of the environment.
onment Type	For example, development, test, or production.
	Specifies the name of the data steward responsible for the envir-
	onment.
Data Steward	For example, Jane Doe.
	For more information on configuring data steward list, refer to the
	Configuring Data Stewards topic.
Server Plat-	Specifies the server platform of the environment.
form	For example, Windows.
Server OS Ver-	Specifies the OS version of the environment's server.

Field Name	Description
sion	For example, Windows Server 2012 R2.
	Specifies the file management system (if the environment is a file-
File Ivian-	based source).
agement type	For example, MS Excel.
File Leastion	Specifies a file path (if the environment is a file-based source).
	For example, C:\Users\Jane Doe\erwin\Mike - Target System
	Specifies the system name being associated with the environment as
Production Sys-	the production system.
tem Name	For example, Enterprise Data Warehouse.
Production	Specifies the environment name being associated with the envir-
Environment	onment as the production environment.
Name	For example, EDW-PRD.
	Specifies the version label of the environment to track change history.
Version Label	For example, Alpha.
	For more information on configuring version display, refer to the <u>Con</u> -
	figuring Version Display of the Environments topic.
	Specifies the overall data quality score of the environment.
DO Scoro	For example, High (7-8).
DQ SCOLE	For more information on configuring DQ scores, refer to the <u>Con</u> -
	figuring Data Profiling and DQ Scores topic.
	Specifies the database type.
	For example, Sql Server.
	Select the type of database from where you wish to scan metadata.
Database Type	Depending upon your choice of database type you need to provide additional fields (connection parameters) appearing on the right hand side.
	Note: There are no additional fields for MS Excel File, and XSD.

5. Click 🕅 to test the connection.

If the connection with database is established successfully then a success message pops up.

6. Click the **Miscellaneous** tab and 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
Sensitive Data	
Indicator (SDI)	Specifies whether the environment is sensitive.
Flag	
	Specifies the SDI classification of the environment.
Sensitive Data	For example, PHI.
Indicator (SDI)	This list is enabled when the Sensitive Data Indicator (SDI) Flag is
Classification	switched to 🔒. For more information on configuring SDI clas-
	sifications, refer to the Configuring Sensitivity Classifications topic.
	Specifies the description of the SDI Classification.
Sensitive Data	For example: Protected Health Information.
Description	It is enabled when the Sensitive Data Indicator (SDI) Flag is switched
	to 🔒. The field autopopulates based on the SDI Classification.
Intended Lice	Specifies the description about the objective of the environment.
Description	For example: The environment contains the source metadata for the
	data integration project.
Environments	Specifies relevant notes about the environment.
Notes	For example: The environment uses Sql Server as database to scan
Notes	the metadata.
Approval	Specifies any instructions for the environment's approval.
Instructions	For example: The environment must contain 50 tables from erwinDIS
	database.

#### 7. Click Save and Exit.

A new environment is created and stored in the environment tree.

Once an environment is created, you can scan source or target metadata from the database type.

Different database types have different prerequisites and connection parameters:

- SQL Server via SQL or Window authentication mode
- Oracle and Oracle RAC
- MySQL
- Snowflake
- MS Dynamics CRM
- SAP ECC R/3 and IS-U Metadata via JCO Driver

### **Scanning Metadata**

After creating systems and environments, the next logical step is to scan source and target metadata. Ensure that the environment database type and connection parameters are correct and the environment is able to establish connection with the database.

To scan source or target metadata, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the System Catalogue pane, right-click the required environment.



3. Click Scan Metadata.

The <Data\_Base> Metadata Scan-Step1 page appears. For example, if it is the SQL Server environment, then the SqlServer Metadata Scan - Step1 page appears.

💀 SqlServer Metadata Scan - Step1 _ 🗆 >	
	Ð X
Database Schema(s)	∧ MetaData Content >
<ul> <li>Select All</li> <li>BBO</li> </ul>	Import Metadata Options:

4. In the **Database Schema(s)** pane, select the database schemas.

#### 5. In the Metadata Content pane, select the appropriate Import Metadata Options.

Refer to the following table for the descriptions of the metadata import options.

Import Metadata Options	Description
Add New	This option adds new objects to the existing object list. The exist- ing metadata is not updated.
Update Existing + Add New	This option adds new objects to the existing list and at the same time the existing metadata is also updated.
Update Existing + Add New + Inval- idate	This option adds new objects to the existing list, updates existing and invalidates table/column during the scanning process.
Delete & Reload	This option deletes all existing metadata and scans only the new objects that have been selected.
Import Comments	Select the check box to import comments.
Table(s)	Select the check box to import Tables.
View(s)	Select the check box to import Views.
Synonym(s)	Select the check box to import Synonyms.

### 6. Click **D**.

The <Database\_Name> Metadata Scan Step-2 page appears. It pulls up the objects selected in Metadata Scan Step-1, such as Tables, Views and Synonyms.



- 7. Select the required objects.
- 8. Click 💾.

The metadata is scanned successfully and saved under the environment node.

For more information on managing metadata, refer to the Managing Metadata section.

You can also import metadata from:

- MS Excel File
- JSON
- CSV (Flat File)
- XMI
- MS Access File
- XSD
# **Creating Maps**

Maps are categorized under projects and a project can have multiple maps. The maps are stored in a hierarchical manner, Projects > Mappings. Source to target mappings are performed in maps. You can create maps under a new or existing projects.

To create maps under a new project, follow these steps:

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

DATA INTELLIGENCE SUITE Mapping	Manage	er		A S	earch		९ <b>¢</b>	08
Workspace Mappings 🗸 👻	Project	Summary						•
Mappings	#	Project Name	Project Description	Project Owner	Subjects Count	Mapping Count	Created By	Created
A Create Project								
BE 🛠 Run Template	1	ERP			0	2	Administrator	2018-0 *
Bf 🚉 View Workflow     Gunenou (7)	2	EDW			0	2	Administrator	2018-1 10:15:1
<ul> <li>a Data Lake Migration (3)</li> <li>B DW (2)</li> </ul>	3	Sales Data Mart			0	8	Administrator	2018-1 10:15:2
<ul> <li>ERP (2)</li> <li>Erwin Project (2)</li> </ul>	4	BFSI Integration			0	1	Administrator	2018-1 10:15:3
<ul> <li>Exeter (2)</li> <li>QVIA (1)</li> </ul>	5	Data Lake Migration			3	3	Administrator	2018-1 10:16:2
<ul> <li>New_Project (1)</li> <li>OBIEE (23)</li> <li>Sales Data Mart (8)</li> </ul>	6	OBIEE			3	23	Administrator	2018-1 12:44:1
	7	AdventureWorks_/			0	8	Administrator	2018-1
	8	Carrefour			12	9	Administrator	2018-1 01:00:2
	9	IQVIA			0	1	Administrator	2018-1 -
				,				
Published Mappings	Mappir	<del>ng Manager</del> Dashboo						

3. Click Create Project.

The Create Project page appears.

🗖 Create Project			_ 🗆 ×
Project Details     Project Details	ocuments Project Users	Save &	Continue Save & Exit Cancel
Project Name*		Cost Center	
Description	<u>а́А́</u> <u>Н</u> В <u>У</u> <u></u> Ш	▶ ≓ ≡ ≡ ≡ ≡ ₹	· · · · · · · · · · · · · · · · · · ·
Project Manager Name Business Sponsor Name		IT Sponsor Name	
Project ETL	SSIS Pseudocode	Enable display of Transformation wit	hout 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.
	For example, John Doe.
Rusinoss Sponsor Namo	Specifies the business sponsor of the project.
Business sponsor Marine	For example, ABC Consulting Services.
Droject ETI	Specifies the ETL tool assigned to the project.
	For example, Informatica Pseudocode.
Cost Center	Specifies the cost center of the project.

Field Name	Description
	For example, Finance and Accounting.
	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
code	pseudocode to Yes to display transformation without
	pseudocode.

### 5. Click Save and Exit.

A new project is created and stored in the project tree.

6. Right-click the project.

DATA INTELLIGENCE SUI	New Map		
Workspace Mappings	📽 Upload Legacy Maps	Project Det	ails Project Docu
<ul> <li>Mappings</li> <li>Mappings</li> <li>Transformations</li> <li>Projects</li> <li>AProject (6)</li> <li>AProject (2)</li> <li>BBT Integration</li> <li>Carrefour (9)</li> <li>Carrefour (9)</li> <li>Carte Law (Ng)</li> <li>Etwin Sales (0)</li> <li>Exeter (2)</li> <li>Ref (2)</li> <li>Ever (2)</li> <li>Sales Data Mar</li> <li>Sample-Project (1)</li> </ul>	UpLoad XML     Ver BaseLine     Export All     Export Change Log     Export Mapping Manager XML     Publish Mappings     Edit Published Maps     Reports     New Subject Area     New Subject Areas     Share Link     Delete Project     Run Template     End To End Lineage     View Workflow	oject rarchy	Map Name

7. Click New Map.

The New Mapping Wizard appears.

New Mapping Wizard	_ 8 X
1. Create a New Mapping	
Mapping Name* Mapping Version Version Label Sync Source Metadata Sync Target Metadata	■
Job Name XRef Mapping Description	A H B Z U E E E E E E E
	Proceed with Auto Map Finish Cancel

8. 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.
	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 of the mapping specification.
Manning Vor	For example, 1.00.
sion	It is autopopulated.
	For more information on configuring version display of maps, refer to
	the Configuring Version Display topic.
Sync Source	Switch Sync Source Metadata to ON to sync source metadata with the
Metadata	mapping.
Sync Target	Switch Sync Target Metadata to ON to sync target metadata with the
Metadata	mapping.
Mapping	Specifies the description about the manning
Description	specifies the description about the mapping.

Field Name	Description
	For example: This is a map between EDW source and IDS target sys-
	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 <u>Con</u> -
	figuring Notifications topic.

#### 9. Click Finish.

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

For more information on performing source to target mappings, refer to the <u>Creating and</u> <u>Managing Mapping Specifications</u> section.

# **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 🔹 👻	Trai	nsformation Details		ţ	) 🕂 🔶 🔶 🗃
Mappings					
<ul> <li>Projects</li> <li>A_Project (0)</li> </ul>	#	Transformation Name	SSIS Pseudocode	Informatica Pseudocode	Intended Use
<ul> <li>AdventureWorks_Migration (8)</li> <li>APJ_Demo (1)</li> </ul>					
<ul> <li>BBT (1)</li> <li>BFSI Integration (1)</li> </ul>	1	1-DataGov(HighDate:12/31/9999)		To_date(mm/dd/yyyy,12/31/9999)	DataGovernance ru
Carrefour (9)	2	2-DataGov(LowDate01/01/0001)		To_date(mm/dd/yyyy, 01/01/0001)	DataGovernance ru
<ul> <li>EDW (2)</li> <li>ERP (2)</li> </ul>	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	1	_ 🗆 ×
		lii ×
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 Lise		

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 <b>Published</b> on ( ( ) to publish the transformation.
Transformation Name	Specifies a unique name of the transformation.
Transformation 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 <b>Replace Transformation Name with Pseudocode</b> 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.

For more information on transformations, refer to the <u>Defining Transformations</u> section.

# **Mapping Source and Target**

You can create mapping specifications using drag and drop method, 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.

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

1. Under the **Workspace Mappings** pane, click the required map.

By default, it opens the Mapping Specification tab.

•	Mapping Specific	ation Grap	hical Designer	Test Specification	Workf	low Lo	g		•
	🧊 🐼 🔳 🍣 (Ir	ntegration]			Profiles:	Prof	ile_ABC	🔽 🕸 🗟	<b>X</b> < D
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Colu Data Type	JMN	Target Column Length	Target Column Precision	Target Colur Scale

2. Click 🜌.

You can now, edit the Mapping Specification tab.

3. Drag source table or column from **Metadata Catalogue** and drop in **Mapping Spe**cification.

You cannot drop source system or source environment in Mapping Specification. Ensure that you drop source table or column under the respective column.

•	Mapping Specifica	tion Graph	hical Designer	Test Specification	Workflow Lo	g		)	Metadata Catalogue	Q, ,	•
	APPEND Off	Regration	1]	Profiles: Defaul	† •	Ø 🐧 👯	3 🖬 🖬 😢 <	7	Metadata	,	٨
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule		<ul> <li>Data Lake</li> <li>Data Models</li> <li>EDW</li> <li>Enviro Salas</li> </ul>		
			dbo.RM_RESO	URCE							

4. Drag target table or column from **Metadata Catalogue** and drop in **Mapping Specification**.

You cannot drop target system or target environment in Mapping Specification. Ensure that you drop target table or column under the respective column.

5. Click 😡.

The mapping specification is saved.

To set the target update strategy, follow these steps:

1. Expand the Additional Mapping Information pane.

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

2. Click the Target Update Strategy tab.

Erwin_Sales (1)     Transformations     Test Cases	2 Erwin_Sales_Targe Integration_Targe dbo.RM_RESOURC_RESOURCENAME_ varchar 100 0	0
🖌 🔜 Mappings		>
Integration (v1.01) MappingTargets	I< < Records from 1 to 6 → >I □ Page 1 . □ 100 rows per page	
<ul> <li>Image: Provide the second secon</li></ul>	Additional Mapping Information	*
IQVIA (1) New_Project (3)	Map Spec Overview Source Extract SQL Target Update Strategy Testing Notes Map Spec Docs Assignment S	Specification Artifacts
OBIEE (23)     ODS (0)     Salas Data Mart (9)		
Sample Project (0)	UnSpecified	
School_Data (2)	Insert else Update     Update else insert	
Published Mappings	O Insert	~

- 3. In the Target Update Strategy tab, click **2**.
- 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 specification 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

### **Categorizing Codesets and Defining Code Values**

You can create and manage codesets in Codesets Manager. Its workspace has two sections, Enterprise Codesets and Codeset Mappings. You can categorize and define codesets in the Enterprise Codesets section, while you can create codeset crosswalks (mappings) in the Codeset Mappings section.

Before defining codesets, you need to create categories to hold the codesets.

To create categories, follow these steps:

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



3. Click New Category.

The New Category page appears.

🚦 New Category		_ 🗆 ×
	Li 🗙	
Category Name*		
Category Description		

4. Enter Category Name and Category Description.

For example:

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

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

After creating a category, you can define codesets, which are stored inside the category.

To define codesets, follow these steps:

1	Right-click the	category nod	created by	vou in the	ahove sten
т.	Night-Chek the	category nou	E CIEALEU DY	you in the	above step.

DATA INTELLIGENCE SUITE Codeset Mo	anager					Search	५ <b>¢</b>	08
Enterprise Codesets Codeset Mappings								•
Codesets Workspace 🗸	Codeset Grid							
	Codeset Name	Lock Status	Locked By	Codeset Description	Category Name	Created By	Created Date Time	Last Mo
Published Codesets	<	nd	> >I 🜔 Pagel .	25 rows per page	•			•
Refired Codesets								

### 2. Click New Codeset.

The New Codeset page appears.

- New Codeset	- <b>- x</b>
Codeset Name*	
Codeset Description	

3. Enter Codeset Name and Codeset Description.

For example:

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

A codeset is created and stored in the codesets tree.

We can populate code values in codesets by scanning the database.

To populate code values in codesets via DB scan, follow these steps:

1. Click the codeset created by you.

DATA INTELLIGENCE SUITE Codeset M	lanager				Se
Enterprise Codesets Codeset Mappings					
Codesets Workspace 🗸	Category Details				
🖃 📕 Enterprise Codesets	Code Value Grid				
<ul> <li>Environments</li> <li>Codesets</li> </ul>	2				Pro
<ul> <li>Gradient State St</li></ul>	Code Name	Code Value	Code Description	Codeset Name	Syste
SAP					

- 2. In Code Value Grid, click 🜌.
- 3. Click s and expand the Quick Connection pane.

<	Quick Connection	
	*Mandatory Fields	<b>X</b> TEST
	DBType: *	Select DB Type
	Driver Name:	
	IP Address/Host Name:*	
	Port:*	
	Database Name:*	
	System Name:*	
	Metadata Browser	·

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

Field Name	Description
	Specifies the database type.
DBType	For example, Sql Server.
	Select the database type from which you wish to scan codes.
	Specifies the JDBC driver name for connecting to the database.
Driver Name	For example, com.microsoft.sqlserver.jdbc.SQLServerDriver
Driver Marine	It is autopopulated depending on the DB type. You can also
	update the driver name.
IP Address/Host	Specifies the IP address or server host name of the database.
Name	For example, localhost.
	Specifies the port to connect with the database.
Port	For example: 1433 is the default port for a Sql Server database
	type.
Database Name	Specifies the database name being used to connect to the code-
	set.

Field Name	Description
	For example, ErwinDIS931.
	Specifies the name of the system related with the codeset.
System Name	For example, EDW.
	The name of the system should be same as provided in Metadata
	Manager.
	Specifies the name of the environment related with the codeset.
System Envir-	For example, EDW-DEV.
onment Name	The name of the environment should be same as provided in
	Metadata Manager.
Lloor Nomo	Specifies the user name to connect with database.
User Name	For example, sa.
Descured	Specifies the password to connect with database.
Password	For example, goerwin@1.
	Specifies the full JDBC URL that is used to establish a connection
	with the database.
URL	For example, jdbc:sqlserver://SERVER_NAME:PORT#;data-
	baseName=DatabaseName
	It is autopopulated based on the other parameters.

5. Click 🕅 to test the connection.

If connection is established then a success message pops up.

- 6. Write a query in the **Query Panel** and click **Solution** to validate the query.
- 7. Click  $\bigcirc$  to preview the query result.
- 8. Double-click the **Select CSMHeader Template** cell of the required column.

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

						Sút)
ery Panel			<	Quick Connection		
elect*from CAT_DIALO	)G_TAB			*Mandatory Fields		TEST
				DBType: *	Sql Server	۲
				Driver Name:	com.microsoft.sqlserver	.jdbc.SC
				IP Address/Host Name:*	localhost	
				Port:*	1433	
				Database Name:*	ErwinDIS931	
				Sustan Nama*	A System	
				system nume.	/ <u>Coloren</u>	
				Metadata Browser		
ry Result						
ry Result	CAT_DIALOG_TAB_ID	CAT_DIALOG_PROFILE_ID	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROF	PERTIES CREATED_B	γ
y Result	CAT_DIALOG_TAB_ID Select CSMHeader Template	CAT_DIALOG_PROFILE_ID Code Value	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROP Select CSMHeader Temp	PERTIES CREATED_B	<b>iY</b> IHeader Ten
y Result	CAT_DIALOG_TAB_ID Select CSMHeader Template	CAT_DIALOG_PROFILE_ID Code Value Code Value	CAT_DIALOG_TAB_NAME Select CSMHeader Template DefaultTab	CAT_DIALOG_TAB_PROF Select CSMHeader Temp	PERTIES CREATED_B plate Select CSM Administrat	<b>iY</b> IHeader Ten or
y Result	CAT_DIALOG_TAB_ID Select CSMHeader Template	CAT_DIALOG_PROFILE_ID Code Value Code Name Code Value Code Description	CAT_DIALOG_TAB_NAME Select CSMHeader Template DefaultTab DefaultTab	CAT_DIALOG_TA8_PROP Select CSMHeader Temy	PERTIES CREATED_B olate Select CSM Administrat Administrat	<b>Y</b> Header Ten or or
ry Result	CAT_DIALOG_TAB_ID Select CSMHeader Template	CAT_DIALOG_PROFILE_ID Code Value Code Value Code Value Code Description System Environment Name Start Date	CAT_DIALOG_TAB_NAME Select CSMHeader Template DefaultTab DefaultTab DefaultTab	CAT_DIALOG_TAB_PROF	PERTIES CREATED_B plate Select CSM Administrat Administrat	PY Header Ten or or or
ry Result	CAT_DIALOG_TAB_ID Select CSMHeader Template	CAT_DIALOG_PROFILE_JD Code Value Code Value Code Value Code Description System Environment Name Start Date End Date	CAT_DIALOG_TAB_NAME Select CSMHeader Template DefaultTab DefaultTab DefaultTab DefaultTab	CAT_DIALOG_TAB_PROF	PERTIES CREATED_B plate Select CSM Administrat Administrat Administrat	NY Header Ten or or or or
ry Result	CAT_DIALOG_TAB_ID Select CSMHeader Template	CAT_DIALOG_PROFILE_ID Code Value Code Value Code Value Code Description System Environment Name Start Date End Date	CAT_DIALOG_TAB_NAME Select CSMHeader Template DefaultTab DefaultTab DefaultTab DefaultTab DefaultTab DefaultTab	CAT_DIALOG_TAB_PROF Select CSMHeader Temp	PERTIES CREATED_B plate Select CSM Administrat Administrat Administrat Administrat	Y Header Ten or or or or or

9. Select the required Code Value Grid column.

**Note**: You can select multiple columns from the data base.

10. Click to import the selected columns in the **Code Value Grid**.

The selected columns are imported in the Code Value Grid.

You can also enter codes in the Code Value Grid:

- Manually
- Using MS Excel files

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

# **Publishing Codesets**

You can publish your codesets to an environment. To publish the codesets, ensure that you have created and setup an environment.

To create publish environments, follow these steps:

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



3. Click New Environment.

The New Environment page appears.

🎼 New Environment	_ = ×
	li ×
Environment Name* :	

4. Enter Environment Name.

# 5. Click 💾.

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

To publish codesets, follow these steps:

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



3. Click Publish.

The Publish Codesets page appears.

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

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

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

Field Name	Description
	being published.
	For example, Production.

# 5. Click 💾.

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



# **Creating Code Crosswalks (Mappings)**

You can create code crosswalks (mappings) for the source and target codesets in Codeset Manager. These codesets can have the same or different code values. Using the Auto-Map functionality, you can map codesets having same code values. Codesets having different code values can be mapped using the drag and drop method.

A category can hold multiple code maps. Code maps are stored in a hierarchical manner, Category > Mappings. You can also create sub-categories under a category to provide one more level of categorization to mappings.

To create a category, follow these steps:

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



3. Click New Category.

The New Category page appears.

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

4. Enter Category Name and Category Description.

For example:

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

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

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

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



2. Click New Sub Category.

The New Category page appears.

🚦 New Category		. 🗆 X
	<b>Ľ</b> ×	
Category Name * :		
Category Desc :		

3. Enter Category Name and Category Description.

For example:

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

4. Click 💾.

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

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

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

1. Right-click the required category.

	TE Codeset /	Manager			
Enterprise Codesets	odeset Mapping	s			
Code Mappings Workspace	• •	Codeset	Mapping Grid		
Code Mappings					
EDW		#	Source Category	Source Codeset	Source Codeset Version
Integrated_Data	<sub> New</sub> Sub Ca	tegory			
🗄 🚦 New_Category	🖉 Edit Categor	у	in DIS	Sales_Codeset	1.00
	Delete Cate	gory	in DIS	Sales_Codeset	1.00
	🛐 Import Legad	cy Maps	in DIS	Sales_Codeset	1.00
	Assign Users		in DIS	Sales_Codeset	1.00

### 2. Click New Map.

The New Codeset Map page appears.

			_ 🗆 ×
			li ×
Codeset Map Name*			
Codeset Map Version	1.00		
Codeset Map Description			
Source Codeset		Source	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	les	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	·
Target Codeset		Target	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	les 🔺	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	·
Auto Map Auto r	mappina occur	s for source and taraet codes having the same v	values.

#### 3. Enter Codeset Map Name and Codeset Map Description.

For example:

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

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

DATA INTELLIGENCE SUITE Codeset	Manager						Search		0	¢ (	08	8
Enterprise Codesets Codeset Mapping	15											•
Code Mappings Workspace 🗸	Codese	et Mapping Grid						^ Co	odeset T	iree		>
Code Mappings		ð					🥖 🗟 🍪 🕯	•	Co	odeSets 3rd Party Fl	nt Filos	
C_Name C_Name C_Name C_Name C_Name C_Name	*	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID	:		APJ Demo Data_Integ	ration ts	
<ul> <li>Integrated_Data</li> <li>Mappings</li> </ul>								[		Integ	grated_C 1	odese
Integrated_Map(1.00)	1	erwin DIS	Sales_Codeset	1.00	Project_System		710	Α		- 🚺 2	2	
Maprilion	2	erwin DIS	Sales_Codeset	1.00	Project_System		711	Je		- 1	4	
	3	erwin DIS	Sales_Codeset	1.00	Project_System		712	К		EDW opuin DIS		
	4	erwin DIS	Sales_Codeset	1.00	Project_System		713	R	1	Codese	ts	
	<							>		Proje     Sale:     S	s_Codese	n Jt
	I < ≪ Records from 1 to 4 >> >  ■ 25 rows per page .								•	ICD 10		
	1 <u>CS</u>	M MapSpec Overview	•			Ø		•		ICD 9 N_Cat New_Cat New_Cate SAP	gory	
Published Code Mappings	Code Code	eset Map Name eset Map Version	Inte 1.0	egrated_Map 0				~ <				>

6. Click  $\bigotimes$  to validate the code mapping.

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

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

1. Right-click the category.

	re Codeset /	Nanager			
Enterprise Codesets	odeset Mapping	5			
Code Mappings Workspace	• •	Codese	Mapping Grid		
Code Mappings     APJ DEmo					
C_Name EDW		#	Source Category	Source Codeset	Source Codeset Version
🖃 🚦 Integrated_Datc 🗄 🛞 Mappings	💦 New Sub Cat	tegory			
🗄 🚦 New_Category	🖉 Edit Categor	у	in DIS	Sales_Codeset	1.00
	Delete Cate	gory	in DIS	Sales_Codeset	1.00
	Import Legac	cy Maps	in DIS	Sales_Codeset	1.00
	Assign Users		in DIS	Sales_Codeset	1.00

#### 2. Click New Map.

The New Codeset Map page appears.

🕂 New Codeset Map			_ 🗆 🗙
			×
Codeset Map Name*			
Codeset Map Version	1.00		
Codeset Map Description			
Source Codeset		Source	
3rd Party Flat Files.Misc Marital Status Codes 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes		3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	~
Target Codeset		Target	
3rd Party Flat Files.Misc Marital Status Coo 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	des 🔺	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	•
Auto Map 📄 *Auto	mapping occu	rs for source and target codes having the same value	əs.

3. Enter Codeset Map Name and Codeset Map Description.

For example:

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

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

DATA INTELLIGENCE SUITE Codeset	Manager	r					Search		c	¢ (	00	8
Enterprise Codesets Codeset Mapping	ļs											•
Code Mappings Workspace 👻	Codese	et Mapping Grid						^ C	odeset 1	iree		>
Code Mappings	2	Z)					🧳 🗟 婱 💈	₽	Co	odeSets 3rd Party Flo	rt Files	
C_Name C_Name C_Name C_Name C_Name C_Name	*	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID	:		APJ Demo Data_Integr	ration	
E 📕 Integrated_Data E 🚳 Mappings								[		integ	rated_C 1	odese
Integrated_Map(1.00)	1	erwin DIS	Sales_Codeset	1.00	Project_System		710	Α		- 1 2	2	
E New_Category	2	erwin DIS	Sales_Codeset	1.00	Project_System		711	Je		- 1 4	4	
	3	erwin DIS	Sales_Codeset	1.00	Project_System		712	К		EDW envin DIS		
	4	erwin DIS	Sales_Codeset	1.00	Project_System		713	R	Ē	Codese	ts	
	<	Records from	1 to 4 🔉 :	25 rows per	baĝe •			>		Proje     Sciles      2      3     I	ct_Syster	n it
	Code	M MapSpec Overview	Inte	egrated_Map		Ď		•		ICD 9 N_Cat New_Cat New_Categ SAP	jory	
Published Code Mappings	Code	eset Map Version	1.0	0				~ <				>

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

DATA INTELLIGENCE SUITE Codeset	Manag	er						Search			ې <b>¢</b> (	06	
Enterprise Codesets Codeset Mapping	gs												÷
Code Mappings Workspace 👻	Code	eset Mapping Grid							^	Codeset	Tree		>
Code Mappings  APJ DEmo  C_Name  C_Name  DEDW  C_Corresuvalits	2 2 2							2 🖶 🎲 🕄		CodeSets	at Files		
	me	Source Code Value	Target Code Value	Target Code Name	Target Code ID	Target Code Descriptic	Target System/Environment	Target Codeset	Targe Versi		APJ Demo Data_Integ	ration ts	
🖻 🚦 Integrated_Data		1	Integrated	Codeset						±- Integrater	prated_C	odese	
Mappings     Integrated Map(1.00)		4	_								erwin DIS		
		2									ICD 10		
New_Category		3								÷.	ICD 9		
	<								>		New_Cat New_Cate( , SAP	gory	
	•	SM MapSpec Overview	-				Ø		• ^				
Published Code Mappings	Co	deset Map Version	1	00 Indigrad_wgb					~	<			>

10. Click 📕.

The code mappings are successfully saved.

11. Click 💱 to validate the code mapping.

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

Use the following options:

#### Export

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

### **Extend Mapping Grid**

To extend the Codeset Mapping Grid, click

### Associating Code Mappings 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.					
Codecat Man	Specifies the description about the code map.					
Codeset Map	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.					
Publish Envir-	Specifies the environment where the code map is being published.					
	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.

Workspace Mappings 🔹 👻	۱.	Mapping Specific	ation Grap	hical Designer	Test Specification	Workflow Lo	g		•	
Mappings		🔏 🗐 📚 🗐 😍 [Erwin_Map] Profiles: D					iefault 💽 🔯 🗟 🧲 🗖			
<ul> <li>Projects</li> <li>Data Lake Migration (3)</li> <li>EDW (3)</li> </ul>	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule		
<ul> <li>ERP (2)</li> <li>Ervin_Project (4)</li> <li>Transformations</li> </ul>	1	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	int	5	TRUNC	^	
<ul> <li>Test Cases</li> <li>Mappings</li> <li>Envin Map</li> <li>Mapping Francis</li> </ul>	:	erwinDIS	Data_Migration	dbo.ADS_ASSOCI.	ID	bigint	80	TRUNC		
₩appingraigers ▶ 1 Archive	;	8 erwinDIS	Data_Migration	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	bigint	8	ABS		
▶ <b>Fr</b> win_Subject (1)		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.

•	Mapping Specific	ation Grap	nical Designer	Test Specification Workflow Log		Log		۲.
28	I 🐼 🔳 🍣 (E	rwin_Map]			Profiles: Defe	ault	•	🔅 🗟 👯 🗟 < 🖸
#	Source System Name	Source Environment Name	Source Table Name	Source Co Name	Numn Source Colum Data Type	n Source Co Lenath	lumn	Business Rule
1	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALC	□ Target Column Alias □ Target Business Key □ CSM Mapping	Flag		TRUNC
2	erwinDIS	Data_Migration	dbo.AD\$_A\$\$OCI	ID	Specification Artifacts Lookup Reference Co	s blumn	~	TRUNC
3	erwinDIS	Data_Migration	dbo.ADS_ASSOCI	SOURCE_O	SJECT_ bigint	8		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**.
- 7. 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                | ۱.              | Metadata Catalogue 🔍 ,  |
|--------------|-----------------|----------------------------|-----------------|------------------------------|----------------------------|-----------------|---|
| 👔 🚍 🛃 🛛      | APPEND 077 🐯    | [Erwin_Map]                | Profiles:       | Default                      | ▼ Ô;                       | 🐚 👫 🖻 🖬 🐻 😣 < 🛛 | Code Mappings Catalogue   |
| arget Column | Created By      | Created Date               | CSM Mapping     | Last Modified By             | Last Modified              | Reference Table | Code Mappings   |
| .engin       |                 | 2019-10-21 14:36           | :15.057         |                              | Dale lille                 |                 | ▶ <b>E</b> DW   |
|              | Administrator   | 2019-10-21<br>14:36:15.057 | Integrated_Map( | L.00) <sup>hinistrator</sup> | 2019-12-10<br>14:49:07.187 | ^               | <ul> <li>ICD Crosswalks</li> <li>Integrated_Data</li> <li>Mappings</li> </ul> |
|              | Administrator   | 2019-10-21<br>14:36:15.057 |                 | Administrator                | 2019-12-10<br>14:49:07.187 |                 | Map1(1.00)  |

# 8. Click 🐻.

The code map is associated with the data item mappings.

#### **Creating Business Terms**

Business terms are globally defined terms that represent your business terminology usage. Using business terms, you can maintain a common business vocabulary across your organization. You can create business terms in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

To create business terms, follow these steps:

- 1. Go to Application Menu > Data Literacy > Business Glossary Manager.
- In the browser pane, click Business Terms.
   The Workspace switches to the business terms view.
- 3. In the Workspace pane, under the Business Terms node, right-click a catalog node.



#### 4. Click New Business Term.

The New Business Term Definition page appears.

New Business Term Definition	_ 🗆 ×
Business Term *	^
	- 1
Definition	- 1
	^
	~
Description	_
	_
	^
	$\sim$
Notes	
▲ H B I U ■ ■ ■ 目 ⊟ ⊟ ⊟ ■ ↓	~

5. Enter appropriate values to 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 business term.
Business Term	
	For example, Account.
	Specifies the definition of the business term.
Definition	
	For example: An Account contains data for a party.
	Specifies the description about the business term.
Description	For example: Account contains data for posting, payments, debt recov-
	ery, and taxes.
	Specifies the reference notes, if any.
Notes	For example: The data for posting, payments, debt recovery, and

Field Name	Description
	taxes was imported from the Account.xlsx file.
Sensitive Data	Specifies whether the business term is sensitive.
Indicator (SDI)	Switch <b>Sensitive Data Indicator (SDI)</b> to <b>Yes</b> to mark the business term as sensitive.
	Specifies the SDI classification of the business term.
Sensitive Data	For example, PHI.
Classification	This list is enabled when Sensitive Data Indicator (SDI) is switched to
classification	Yes. For more information on configuring SDI classifications, refer to
	the Configuring Sensitive Data Indicator Classifications topic.
	Specifies the description of the SDI classification.
Sensitive Data	For example: Protected Health Information.
Description	It is enabled when Sensitive Data Indicator(SDI) is switched to Yes. The field autopopulates based on the SDI classification.
Business Term Image	Drag and drop a picture of business term or click 📤 to browse and upload a picture.
Acronym	Specifies whether the business term is an acronym.
	Specifies the name of the data steward responsible for the business term.
Data Steward	For example, Jane Doe.
	For more information on configuring list of data stewards, refer to the <u>Configuring Data Stewards</u> topic.

**Note**: By default, sensitivity fields (Sensitive Data Indicator (SDI), Sensitive Data Indicator (SDI) Classification, and Sensitive Data Indicator (SDI) Description) are enabled for business terms. For more information on enabling sensitivity fields, refer to the <u>Configuring Asset Details</u> topic.

# 6. Click 💾.

A business term is created and added to the catalog.

Based on your workflow assignment settings, the business term may need further

action for review or approval. For more information, refer to the <u>Managing Business</u> <u>Glossary Workflows</u> topic.

Once, a business term is created you can set up associations for business terms.

You can also create Business Policies, Business Rules, and other business assets in the Business Glossary Manager. For more information on creating business assets, refer to the Managing Business Glossary section.

### **Setting Up Associations for Business Terms**

By default, you can associate business terms with business assets (business policies and other business terms) and technical assets (columns, environments, and tables). You can control the asset types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

To set up associations for business terms, follow these steps:

 On the Grid View tab, under the Options column, click S. The business term opens in edit mode.

Edit Business Term-Business_T	erm					
Business Term Details	Associations	Additional Details	Rich Media Library	Collaboration Center	History	Workflow Log
Abc Business_Terr	n					
Business Term *						
Business_Term						
Classification						
Select Value						•
Definition						
≌ <u>A</u> <u>H</u> B <i>I</i>	⊻ ≣≣	≡ ■   E IE *	i ti 🖌			
						*
						~

2. Click the Associations tab.

E	dit Busine	ss Term-Busine	ss_Term						-	□ ×
4	Busines	s Term Details	Associations	Additional Details	Rich Media Library	Collaboration	i Center Histo	workflow	Log	•
Bu	siness Poli	cy	•						Ō	+
Acti	ions	Relationship Name	Policy Name	Definition	Description	Catalog Name	Catalog Hierarchy	Data Steward		
					No Records Found					
	1	Records from	n 1 to 1 of 1							

3. In the asset type (business policies, business terms, columns, environments, and tables) list, select an asset type to associate with the business term.

Business Term Details	Associations
Business Policy	<b>•</b>
Business Policy	Name
Business Rule	tunic .
Business Term	
Column	
Environment	
System	
Table	
Tags	

4. Click +.

The Relationship Associations page appears. Based on the asset type that you select, it

#### displays a list of available assets.

Relation	nship Associations						_ 🗆 ×
						Save	Cancel
Current C	Context:	Business_Term					
Current C	Context Type:	Business Term					
Relations	ship Name:	is associated with	١			-	
Search (p	partial matches):						
	Policy Name	Description	Definition	Catalog Name	Catalog Hierarchy	Data Steward	
	Gender Policy			Customer Gender D	Q Po Customer Gender DQ Po	olic 🎽	•
						N/A	
	Ledger Policy	The GL is at the heart	t of C	HV	HV		-
1-2	Records from	n 11 to 16 of 16					

- From the list, select assets to associate with your business term.
   If you know the asset name, use the Search (partial matches) field to look up for it.
- 6. Click Save.

The selected assets are associated with the business term and added to the list of associations.

You can define as many associations as required.

## **Creating Test Cases**

You can create multiple test cases at project level and, record expected and actual results. Using these test cases, you can test data mappings and ETL process. You can also manage test cases as per your requirements.

To create test cases, follow these steps:

- 1. In the Workspace Mappings pane, expand a project.
- 2. Click the Test Cases node.

The Test Case Summary pane appears.

DATA INTELLIGENCE SUITE Mapping	Manag	ler				
Workspace Mappings 🔹 👻	Test C	ase Summary				
Mappings	٠	⊕ ⊕				
<ul> <li>Projects</li> <li>A_Project (1)</li> <li>AdventureWorks_Migration (8)</li> <li>APJ_Demo (1)</li> <li>Ervin_Project (2)</li> <li>Transformations</li> <li>Test Cases</li> <li>Mappings</li> <li>Ervin_Map (v1.00)</li> <li>K_New_Mapping (v1.00)</li> </ul>	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Des

3. Click •.

The Add New Test Case page appears.



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
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.
Tosting Com	Specifies the testing comments about the test case.
ments	For example: The source metadata was scanned from a Sql Server data
inches	base.

#### 5. Click Save and Exit.

The test case is created and saved under the **Test Cases** node.

For more information on test cases, refer to the <u>Creating and Managing Test Cases</u> topic.

### **Documenting Requirements**

You can document functional requirements in a standardized manner in Requirements Manager. It is an agile and collaborative platform to create customized requirements templates.

To document your requirements in standard templates, follow these steps:

- 1. Go to Application Menu > Data Catalog > Requirements Manager > Requirements Workspace.
  - DATA INTELLIGENCE SUITE Requirements Manager Â 08 ents Workspace A Projects Summer Specification Templates Catc 
     Subjects
     Specification
     Specification
     Created By
     Created Date

     Count
     Count
     Artifacts Count
     Created By
     Created Date
     **Project Description** Modified Date Edit Dele Histor Modified By ame 🕨 🔒 APJ (1) 🕨 🔒 Nasdaq PDLC (1) 🕨 🔒 ARCBS (1) 1 <u>APJ</u> 2 Administrato 03/13/2019 23:0 Administrato 03/13/2019 23:01 🖌 × Ð 0 P\_Name (1) 2 ARCBS 0 62 Administrato 04/02/2019 14:3: Administrato 04/02/2019 14:3: 🖍 × Ð 0 Administrato 03/20/2019 09:5- Administrato 03/20/2019 09:5-Ð 3 Nasdaa PDLC Ð P Name 0 0 Administrato 10/17/2019 16:3: Administrato 10/17/2019 16:3: 🖍 🗶 > >| C Page 1 • 25 rows per page • Records from 1 to 4 |< <
- 2. Right-click the Specification Templates Catalogue node.

3. Click Create Project.

Create Project page appears.

					 Li X
Project Name*					
Project Descriptio	'n				
а <u>н</u>	BZ	<u>u</u> ≡	= = =	\$ <u></u>	*≣ *≣
					<b>^</b>
					<u> </u>

4. Enter Project Name and Project Description.

For example:

- Project Name Nasdaq PDLC
- Project Description This project captures functional and business requirements of the data migration project.

# 5. Click 💾.

A new project is created and stored in the project tree.

6. Right-click the project node.

DATA INTELLIGENCE SUITE Requirements	Manager										<b>ģ</b>	08
Requirements Workspace	•	Specifications D	etails	_	Project Details		Proje	ect Users				,
🔺 🇱 Specification Templates Catalogue	Specificatio	ons Listing										
<ul> <li>EDW (0)</li> <li>AP1 (1)</li> </ul>	# Spec	cifica Specification	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
Nasdag PDLC (1)												
ARCBS (1)												
4 🚦 P_Name (0)												
Create Specificat	tion											
Import specificati	ion											
Summary 🗸												
Pending Review												
Pending Approval												
Approved												
Published												
Rejected												
-				No Recor	ds Found	5.51.0	Page 1 🖕 📄 25	rows per page				
			I.		as 1 o o 1 d	e el 🕞	- • = -					

7. Click Create Specifications.

Create Specifications page appears.

Create Specification				_ 🗆 ×
			Ľ	×
Specification Template Type		Specification Description		
Default	-	<b>ĩ</b> <u>A</u> <u>H</u> B <i>I</i> <u>U</u> ≡ ≡ ≡ ≡ ∷ ∷	: ta ta	3
Specification Template Description				-
Default Template	*			
	-			-
Specification Name*		Specification Owner		
		-Select Owner-		•
Specification Version		Status		
1.00		Pending Review		•
Version Label		Mail Comments		

8. 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 template of the specification.						
Specification	For example, Health Migration Template.						
Template Type	You can create templates and add artifacts to templates in the						
	Requirements Manager Settings.						
Specification	Specifies the description about the specification template.						
Template	For example: The Health Migration Template is to capture functional						
Description	and business requirements of the data migration project.						
Specification	Specifies the name of the specification.						
Name	For example, OrganMatch.						
	Specifies the version of the specification.						
Specification	For example, 1.01.						
Version	The specification version is autopopulated. For more information on						
	configuring version display of specifications, refer to the Configuring						
	Version Display topic.						

Field Name	Description
	Specifies the version label of the specification.
Version Label	For example, Beta.
	For more information on configuring version display of specifications,
	refer to the Configuring Version Display topic.
	Specifies the description about the specification.
Specification	For example: The specification uses the Health Migration Template to
Description	capture functional and business requirements of the data migration
	project.
Specification	Specifies the specification owner's name.
Owner	For example, Jane Doe.
Chatura	Specifies the status of the specification.
Status	For example, Pending Review.
	Specifies the mail comments, which are sent to the project users.
Mail Com-	For example: The specification uses the Health Migration Template.
ments	For more information on configuring email notifications, refer to the
	Configuring Email Settings topic.

# 9. Click 💾 .

A new specification is created and stored in the specifications tree. The specifications tree is nested under the project node.

10. Document your requirements in the **Specification Overview** page.

DATA INTELLIGENCE SUITE Requiremen	ts Manager				<b>a 0 E</b>
Requirements Workspace	Specification Overview	Specification Details	Supporting Documents	Collaboration Center	His
<ul> <li>Specification Templates Catalogue</li> <li>EDW (0)</li> <li>ADV (0)</li> </ul>	Specification - Sp_Name				
<ul> <li>APJ (1)</li> <li>Nasdaq PDLC (1)</li> <li>ARCBS (1)</li> <li>P_Name (1)</li> </ul>	Project: P_Name Owner: Status: Pending Review				
Specifications     Sp.Name (v1.00)     Context Diagram     Business Requirements	General Context Context Diagram				Edit
Brunctional Requirements Dugations for the Contro Appendix	Business Requirements Functional Requirements				
	Obligations for the Contract	tor			
	Appendix				
Summary	4				~

**Note**: Specification Overview page depends on the **Specification Template Type** selected while creating the specification.

11. Click 🗐.

The artifact is saved.

For more information on creating specifications and documenting requirements, refer to the Using Requirements Manager section.

## **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.

DATA INTELLIGENCE SUITE Mapping	Manag	er						Ą		rch 🤍 🗘 🖉 🖪	
Workspace Mappings 🛛 👻	· _	Mapping Specifica	ation Grap	hical Designer	Test Specification	Workflow Lo	g		•	Metadata Catalogue 🔍 ,	
Mappings	<b>1</b>	APPEND 017	🞅 [A_Map]		Profiles: Default	-	🏟 🗟 🔣 🖻	) 🖬 🐻 😣 <		Metadata     Marty Flat Files	
<ul> <li>Projects</li> <li>A_Project (1)</li> <li>Transformations</li> </ul>	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule		A_system     A_dventureWorks     AdventureWorks     AdventureWorks	
Test Cases  Mappings  Mapp	1	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	int	4		^	<ul> <li>Atlas Sales System</li> <li>BI</li> <li>BO Reports</li> </ul>	
AdventureWorks_Migration (8)     APJ_Demo (1)     BBT (1)	2	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_PRC	int	4				
BFSI Integration (1)     Carrefour (9)     Data Lake Migration (3)     EDW (2)	3	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	50			erwinDIS     JDEdwards     Mew_Erwin	
ERP (2)     Ervin_Project (2)     Evter (2)	4	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	4000			PeopleSoft     Salesforce     Salesforce	
<ul> <li>QVIA (1)</li> <li>New_Project (1)</li> <li>BIEE (23)</li> </ul>	5	A_System	A_Environment	dbo.CAT_DIALOG	CREATED_BY	varchar	50		l	T_New     Teradata     TestCOMM	
Sales Data Mart (8)	6	A_System	A_Environment	dbo.CAT_DIALOG	CREATED_DATE_TI	datetime	8				
	4		i					1	)	Code Mappings Catalogue	
<			< <	Records from 1 to 9	> > [	Page 1 🖕 🗐	100 rows per page	•		Specification Artifact Catalogue	
Published Mappings	Additi	onal Mapping Infor	mation						^	Reference Table Catalogue	

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

A list of header columns appears.

DATA INTELLIGENCE SUITE Mapping	Manage	er						
Workspace Mappings 🛛 👻		Mapping Specific	ation Gro	phical Designer	Test Spe	cification	Workflow Lo	g
Mappings	<u>i</u>		👌 [A_Map]		Profiles:	Default	•	¢.
<ul> <li>Projects</li> <li>A.Project (1)</li> <li>Transformations</li> </ul>	#	Source System Name	Source Environment Name	Source Table	Source	Column	Source Column Data Type	Source Length
Karat Cases ✓ State Cases ✓ Mappings ✓ Map (v1.00)	1	A_System	A_Environment	Specification Artif Lookup Reference Lookup On Trans Lookup On	acts e Column		nt	4
MappingTargets AdventureWorks_Migration (8) APJ_Demo (1) BBT (1)	2	A_System	A_Environment	Source Column P	recision cale		nt	4
<ul> <li>BFSI Integration (1)</li> <li>Carrefour (9)</li> <li>Data Lake Migration (3)</li> </ul>	3	A_System	A_Environment	dbo.CAT_DIALO	G CAT_DIA	LOG_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.

Manager						ê Sec	arch Q 🔅 🛛
∢ Ma	oping Specification	Graphical	Designer Tes	t Specification Workflow Log		•	Metadata Catalogue 🔍 🔺
<u>i</u>		] [A_Map]	Prof	iles: Default	) 🗟 👫 🗟 🗖	🐻 😣 < 🗵	Code Mappings Catalogue
et Column	Target Column	Created By	Created Date	Specification Artifacts	Last Modified By	Last Modified	Specification Artifact Catalogue 👻
iype	Length					Date lime	Specification Templates Catalogue
	4	Administrator	2019-10-16 15:44:32.383	<b>Sp_Name</b> (v1.00	) Administrator	2019-10-17 11:56:07.883	<ul> <li>APJ (1)</li> <li>Arsdaq PDLC (1)</li> <li>ARCBS (1)</li> </ul>
	4	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353	<ul> <li>P_Name (1)</li> <li>Image: Specifications</li> <li>Sp_Name (v1.00)</li> </ul>
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.

## **Running Lineage Analysis**

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 lineage analysis generates a lineage, which includes both forward and reverse lineage.

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

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, click the required table.
- 3. In the right pane, click the **Data Lineage** tab.

By default, dual lineage of the table appears.



To view forward lineage of the table, click the Forward tab.

Columns Table Properties Extended	Properties Associations	Mind Map Data Qu	ality Documents	Indexes	Impact Analysis	Data Lineage	Test S
Dual Forward Reverse							
Lineage For: SQLTechPubs -> SQLTechPubs	-> dbo.Customers		0	verview Lineag	e 🌒 🔼	5	<u>ل</u> ا
				Summ	ary		•
				Colum	nn Details		•
				#	Column		
							_
				1	Address		Hel
SOLTechPubs -> SOLTechPubs	Oracle -> TechPubs		Salesforce ->	2 TechPub	City		Self
dbo.Customers	APPQOSSYS.V	VLM_CLASSI	III Account	3	CompanyNar	ne	
Address	→	<b>A</b>	→ † Type	4	ContactName	,	
CompanyName	→ ♥ NCLSRS		→ ♀ Parentid → ♀ IsDeleted	6	CustomerID		
ContactName		T	MasterRe	cordId 7	Region		
				Techn	ical		•
				Busine	222		
4				Extend	ded Properties		•

To view reverse lineage of the table, click the **Reverse** tab.

Columns Table Properties Extended Properties	Associations Mind Map	Data Quality	Documents	Indexes	Impact Analysis	Data Lineag	ge Test S
Dual Forward Reverse							
Lineage For: SQLTechPubs -> SQLTechPubs -> dbo.(	Customers		Ove	erview Lineage		23 B	<u>ل</u> م
				Summ	ary		
				Colum	n Details		•
				#	Column		
				1	Address		f Hel
erwinDoc -> erwinDOC	Account	A	SQLIechPubs - dbo.Custo	SQL 2	CompanyNan	ne	Se l
CustCity	Number of Records	<b>A</b>	→ 🗘 Address	4	ContactName		_
U CustName	Acct Prod Source Id Acct Cod Ccy		→ ♀ ComapnyN → ♀ CompanyN	lame 5	ContactTitle		
Y	Cod Acct No	7	ContactNa	me <sup>6</sup>	CustomerID		
				Techni	cal		-
				Busine	ss		
4				Extend	led Properties		•

You can also run the lineage at the following levels:

- System
- Environment

Column

For more information on performing lineage analysis in Metadata Manager, refer to the <u>Running Lineage Analysis</u> section.

#### **Running Impact Analysis**

After mapping source metadata with target metadata, you can run impact analysis on the technical assets that form the mappings. Impact analysis helps you understand upstream and downstream dependencies of technical assets. It helps you assess the impact of transformations and source or target-level changes.

To run impact analysis at table level, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, click a table.
- 3. Click the Impact Analysis tab.

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

•	Columns	Table Properties	Data Quality	Documents Ex	xtended Properties	Indexes	Impact Analysis	Forward Lineage	Reverse Lineage	Test Specific
Sumr	nary - Direct Impo	<del>;</del> †	∢ Summ	ary - Indirect Impact				ζ Audit Information		× 1
	1						_	Audit	Information	
				4			Upstream Impact	Created By	Administrator	^
			As Source	3			Downstream Impact	Created Time	01/10/2020 18	:28:16
			As Target	2		,	In Business Rule	Modified By	Administrator	_
							In Source Extract SQL	Modified Time	01/10/2020 18	:28:16
		9					In Lookups			~
					Indirect Impact			<		>
4	Direct Impact	Indirect Impact	Other Impacts							•
As So	urce									^
#	Project Name	Марр	ing Name	Target Information	on				Business Rule	
				Table	Enviro	nment	System			
1	ERP	Integra	ition	dbc.RM_RESOUR	<u>CE_New</u> Integra	tion_Target	Erwin_Sales_Targe	)†		~
2	Erwin_Project	Integra	ition	dbc.RM RESOUR	CE New Integra	tion_Target	Erwin_Sales_Targe	et .		
3	Erwin_Projoct	Intogra	ition	dbc.RM_RESOUR	<u>CE_Now</u> Intogra	tion_Targot	Erwin_Salos_Targo	d .	FLOOR	
		l	e		~~··					~
As To	rget									~
+	Project Name	Mapp	oing Name	Source Informe	ation				Business Rule	
				Table	Envi	onment	System			
1	Erwin_Fob	Integra	ation_Fob	dbo.ADS_ASSO	CIATIONS Data	Migration	orwinDIS			~
1										× ×
<										$\rightarrow$

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

It displays the upstream and downstream impact of the table.

•	Columns	Table Properties	Data Quality	Documents E	extended Properties	Indexes	mpact Analysis	Forward Lin	ieage	Reverse Lineage	Test Specific
											🔊 🔁
Sum	nary - Direct Impa	ct	😮 Sumn	nary - Indirect Impact				ζ Audit Info	rmation		>
	1					-		Audit		Information	1
				4			Upstream impact	Created E	Зу	Administrate	n n
			As Source	3			Downstream impact	Created 1	lime	01/10/2020	18:28:16
			As Target	2	1 1		In Business Rule	Modified	By	Administrate	or 📃
							In Source Extract SQL	Modified	Time	01/10/2020	18:28:16
		9			indirect Impact	-	In Lookups	1			`
	Disc of Just and	In all a shift and the second	Othersteinerste								
4	Direct impact	Indirect Impact	Other Impacts								•
Upst	eam Impact										^
+	Project Name	Mapp	ing Name	Source Table	Source	e Environment/System	Target Table		Target Er	nvironment/System	
1	ERP	Integra	tion	dbo.RM_RESOU	RCE Integra RCE Erwin_S	tion tion/Erwin_Sales ales	dbo.RM RESOURC	CE New	Integratio	n_Target/Erwin_Sales_T	arget
2	Erwin_Project	Integra	tion	dbo.RM_RESOU	RCE Integra	tion/Erwin_Sales	dbo.RM_RESOURC	CE_New	Integratio	n_Target/Erwin_Sales_T	arget
3	ERP	Integra	tion	dbo.RM RESOU	RCE Integra	tion/Erwin_Sales	dbo.RM RESOURC	E New	Integratio	n_Target/Erwin_Sales_T	arget
A	Envin Salar	Intogra	tion	dbo PLL PESOU	PCE Intogra	tion/Envin Salos	dbo PM PESOUP	New	Integratio	n Taraot/Envin Salar T	araot
Dow	nstream Impact										*
#	Project Name	Mapp	ing Name	Source Table	Sour	ce Environment/Syste	m Target Table		Targe	t Environment/System	
1	Erwin_Feb	Integro	ation_Feb	dbo.ADS_ASSC	Data_	Migration/erwinDIS	dbo.RM RESOU	RCE	Integro	tion/Erwin_Sales	

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

It displays the impact of the table on:

- Business rules
- Source Extract SQL
- Lookups

•	Columns	Table Properties	Data Quality	Documents	Extended Properties	Indexes	Impact Analysis	Forward Lineage	Reverse Lineage	Test Specific
Sumr	nary - Direct Impac		< Summe	ary - Indirect Impo	ct			Audit Information		*
							Upstream Impact	Audit	Information	
			Ar Source				Downstream Impact	Created By	Administrator	~
			As Toroat	2		1	🛑 in Eusiness Rule	Created Time	01/10/2020 18:2	8:16
			0101261				📕 in Source Extract SQL	Modified By	Administrator	
		9			Indirect Impact		📕 in Lookups	Modified Time	01/10/2020 18:2	8:16 🗸
	Direct Impact	Indirect Impact	Other Impacts							
•				_						_
in Bu	siness Rules					_	_			^
#	Project Name	Mapping Name	Source System	5	Source Environment	Source Tab	ble Bu	siness Rule	Extended Business	Rule Tai
1	Erwin_Sales	Integration	Erwin_Sales	In	tegration	dbo.RM_RE	SOURCE dbc	RVLResource		(^
<										$\rightarrow$
le Ce		_	_	_		_	_			
10.20	nice Exiliaci 201			_	_	_				^
#	Project Name		Mapping Name		Source Extract SQL					
1	Erwin_Sales		Integration		Select * from dbo.RM_	RESOURCE				<u></u>
in lo	nk me									
	i i i i i i i i i i i i i i i i i i i		-	_	_	_		_		
#	Project Name	Mapping Name	Source System	Sc	ource Environment	Source Table	Look	up Condition	Lookup On	Looku
1	Erwin_Soles	Integration	Erwin_Sales	Inte	egration	dbc.RM_RESC	SELEC RESOU RESOU RESOU RESOU RESOU	T RESOURCEID, JRCENAME, JRCEDESC, JRCECELLPHONE, JRCECHOMEPHONE,	RESOURCENAME	
<	1		1			1	RENCI	REFERRE ROM		>

For more information on performing lineage and impact analysis in the Metadata Manager, refer to the <u>Running Impact</u> and <u>Lineage Analysis</u> section.

You can also run impact analysis in the Mapping Manager on:

- Any source/target table
- Any source/target column

### **Exporting Mapping Specifications to ETL Tools**

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.

The	Mapping	<b>Specification</b>	grid appears.
-----	---------	----------------------	---------------

Workspace Mappings 🔹 👻		Mapping Specifica	tion Graph	ical Designer	Test Specification	Workflow Lo	g	•
Mappings		📝 🗐 🔯 🗏 🍣 [Erwin_Map]			Profiles: Default 💽 🔯 🔩 👯			🐧 👯 🔊 < 🛛
<ul> <li>Projects</li> <li>Data Lake Migration (3)</li> <li>EDW (2)</li> </ul>	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>ERP (2)</li> <li>Ervin_Project (2)</li> <li>Transformations</li> </ul>	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
<ul> <li>Test Cases</li> <li>Mappings</li> <li>Envin_Map (v1.00)</li> <li>New Mapping (v1.00)</li> </ul>	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	SOURCE_OBJECT_	bigint	8	ABS
<ul> <li>Exeter (2)</li> <li>IQVIA (1)</li> </ul>	3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	SOURCE_OBJECT_	bigint	8	ABS

3. Click 👯.

The Export Window page appears.

Export Window										
ETL Integration Library: To	ETL Integration Library: To extend the library, contact support - 🔀 Filter : 🛛 ALL 💽									
Mapping Manager	Testing Automatic	on ETL Engineering	Data Vault 2.0	Big Data	ARCBS Reports	Care				
	Nasdaq Data Asset Form	n				•				
	Type : CAT									
	Created By [Time]: Last Updated By [Time]:	Administrator [12/18/2018 0 Administrator [12/18/2018 0	)4:04:16]  4:29:15]							
Mapping Manager XML Composition Clearab	Mapping Manager XML Mapping Manager XML Type : CAT Created By [Time]: Last Updated By [Time]:	AnalytiX Data Services [09/1 AnalytiX Data Services [09/1	.4/2018 10:39:44] .4/2018 10:39:44]							
	Generate JSON Schema Generate JSON Schema									

4. Click the ETL Engineering tab.

	Export Window _ D X										
ETL	Integration Library: To	extend the library, conta	ct support - 🔀		Filter :	Filter : ALL					
•	Mapping Manager	Testing Automatic	on ETL Engineer	ring Data Vault 2.	D Big Data	ARCBS Reports	ports Care				
	INFOR- MATICA	Informatica 9x This template creates a simple ETL job for the selected Mappings									
	CAT	Type : CAT									
		Created By [Time]: Last Updated By [Time]:	AnalytiX Data Services AnalytiX Data Services	Click an option t	Click an option to Export						
		SSIS Forward 2012 This template creates a sin	nple ETL job for the selec	ted Mappings							
	<b>V</b> AI	Type : CAT									
		Created By [Time]: Last Updated By [Time]:	AnalytiX Data Services AnalytiX Data Services	[09/14/2018 10:39:48] [09/14/2018 10:39:48]							
Import Microsoft SSIS DTSX Import SSIS DTSX Packages for 2005, 2008, 2010, 2012 & 2014 Versions of Microsoft SQL Server											

5. Select the required ETL tool and click 🛍.

The Multi Mapping page appears.

Multi Mapping	_ 🗆 ×
Load Active Mappings Load ALL Mappings	(†) 🗙
Projects	
A_Project (1)	
AdventureWorks_Migration (8)	
APJ_Demo (1)	
BBT (1)	
BFSI Integration (1)	
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🕨 🔲 🏪 Data Lake Migration (3)	
EDW (2)	
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🔺 🗹 🔜 Mappings	
💽 🧰 Erwin_Map (v1.00)	
🔲 📻 K_New_Mapping (v1.00)	
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▶ 🔄 📲 IQVIA (1)	
🕨 🔲 📲 New_Project (1)	
DIEE (23)	
🕨 🔲 📲 Sales Data Mart (8)	

6. Select the mapping and click 🛍.

The following notification appears.

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Workflow Lo	Profiles	MATICA CAT	Download File	3	, 1 1	Metad Q -
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7. Click the **Download File** hyperlink.

The mapping specification is exported.