

erwin Data Intelligence Suite

Metadata Management Guide

Release v10.2

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Managing Metadata

This section walks you through the metadata management. Metadata management is done via Metadata Manager. It involves scanning metadata from a data source and storing it in a central repository.

You can preview the data, profile it, generate pattern summary report and provide data quality score.

After performing source to target mappings in the Mapping Manager, you can run Forward or Reverse lineages and perform impact analysis in the Metadata Manager.

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

Using Metadata Manager

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

DATA INTELLIGENCE SUITE			Metadata Manager			Search			Q 🗢 🛛 🖓 🛄 😝
System Catalogue	<	Metada	ta Summary						2 •
Sensitive Data	^	۰ D	ata Dictionary	Configure Extended Pro	perties Scheduled	I Jobs			, <u> </u>
🔺 📱 Metadata		#	System		Business Purpos	e	# of Environments	Created By	Created Date
▶ 🖵 erwin DI Suite									
▶		1	erwin DI Suite				1	Administrator	2020-07-29 11:06:40.16
▶									
Informatica		2	erwin DM				3	Administrator	2020-02-26 03:51:36.65
MS Excel									
▶ 🖵 New		3	erwinDISPoC				0	Administrator	2020-03-30 05:38:51.81
Oracl ¹									ŝ
Salesforce		4	Informatica				1	Administrator	2020-02-26 03:53:17.733
> □ SAP		5	MS Excel				1	Administrator	2020-04-02 07:03:30 613
G SOL Sustan		-							
GQL System		6	New				1	Administrator	2020-05-18 12:03:20.743
		7	Oracle				1	Administrator	2020-02-27 05:23:46.217
Tech pubs							Page 1 25 route per	0300	·
↓ □ test_to be deleted					< < Records f	trom 1 to 1/ >>I	25 rows per	haile *	
→ 🖵 XMI	Ŧ	Metada	ta Manager Dashi	board					3

UI Section	Function
1-System Cata-	Use this pane to browse through your metadata that is stored in a hier-
logue	archical manner, System > Environment > Table > Column.
2-Right Pane	Use this pane to view or work on the data based on your selection in the
	System Catalogue.
3-Metadata Man-	Use this pane to view consolidated reports on system overview, system
ager Dashboard	usage in mappings, system summary, and sensitive data indicators.

Managing metadata involves the following:

- Creating and managing systems
- Creating and managing environments
- Scanning metadata from data sources
- Creating new versions of environments
- Downloading and updating data dictionary

- Running impact analysis
- Running lineage analysis
- Previewing and profiling data
- Configuring extended properties
- Creating and managing test cases for tables
- Viewing metadata manager dashboard

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.

Sy	stem Catalogue	<	Ме	tadata Summary	
	🔒 Sensitive Data	•	•	Data Dictionary	Configure Extended Pro
	Metadata	1	#	System	
	🕨 🖵 erwin 🛛 🙀 Configure Expa	nded L	.ogica	I Name	
	erwin [R View Workflow			atica	
	PerwinDISPoC				

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	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.
Conver Diatform	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.
Eilo Managomont	Specifies the file management system (if the system is a file-
	based source).
Турс	For example, MS Excel.
Ownor Namo	Specifies the full name of the system owner.
	For example, Talon Smith.
Talanhana Numbar	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	 Source
(Source/Target)	 Target
	 Both
	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.
Server 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
Empil Address	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 Manager 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	Specifies the total number of tables associated with the system.
of Tables	For example, 300.
Definition of	Specifies the definition of the system at the end of the day.
the day	For example: Extraction of details from the source system is com- plete.
Batch Extract	Specifies the daily batch extract window of the system.
Window	For example: Batch extract from the source system is scheduled at 3:30 P.M. everyday.
Average Llear	Specifies the average number of system users.
Average User	For example, 30.
Average Con-	Specifies the average number of concurrent system users.
current Users	For example, 15.
Sensitive Data	Specifies whether the system is sensitive.
Indicator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to 🔒 to mark the system
Flag	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.
	Specifies the description of the SDI classification.
Sensitive Data	For example: Protected Health Information.
Description	It is enabled when Sensitive Data Indicator (SDI) Flag is switched to
Description	💼. The field autopopulates based on the SDI Classification.
Creation Instance	Specifies any special instructions or comments about the system.
tions	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 the system is created, you can <u>create environments</u> and scan metadata from different database types.

You can enrich the system further by:

- Adding Documents
- Viewing Workflow Logs
- Associating Systems
- Configuring Expanded Logical Name of Tables/Columns

You can manage a system as per your requirements. Managing systems involves:

- Editing or deleting systems
- Exporting systems information

Adding Documents

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

To add documents to systems, follow these steps:

1. In the **System Catalogue** pane, right-click a system.



2. Click New Document.

The Upload Document page appears.

Upload Document				_ 🗆 ×
				± ×
System Document Name*	Tech Docs	System Document Owner		
System Document Object	Drag-n-Drop files here or click to select files for upload.	Document Link		
Intended Use Description	<u>≩ A H</u> B <i>I</i> U			
			Â	
			v	
Approval Required Flag		Document Status	In Progress 🗸	

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

Field Name	Description						
System Document	Specifies the name of the physical document being attached to the system.						
Name	or example, Source System Details.						
System Document Object	Drag and drop document files or use ≐ to select and upload doc- ument files.						
System Document	Specifies the document owner's name.						
Owner	For example, John Doe.						
	Specifies the URL of the document.						
Document Link	For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn- b5YkMBq4ptA7jhg5/view						
Intended Lice	Specifies the intended use of the document.						
Description	For example: The document is to keep a record of system descrip- tion and its data dictionary.						
	Specifies whether the document requires approval.						
Required Flag	Select the Approval Required Flag check box to select the doc- ument status.						
	Specifies the status of the document.						
Document Status	For example, In Progress.						
	Note: This field is available only when the Approval Required Flag check box is selected.						

4. Click 💾.

The document is saved on the System Documents tab.

		Metadata Manager			1 Searc	h			ି ଦ୍ 🌣	0	• •
ľ		Data Dictionary	System Details	Extended Properties	Data Lineage	Mind Map	Associations	System Documen	ts Config	ure Extend	ed Prop
	SNo	Document Name	Document Link	Document Status	Doci Intended Use Own Description	Created By	Created Date	Modified By Mod	ified Date	Options	
	1	Tech Docs	https://erwin.com/book	shelf/10.1D InProgress		Administrator	2020-10-20 13:1	1:04 Administrator 202	0-10-20 13:11:04	4.78 🖻 🖌	/ 💀

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

Preview (💇)

Use this option to preview the document.

Edit 🖍)

Use this option to update the document details.

Delete (🔯)

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

Viewing Workflow Logs

You can view workflow logs and know the current stage of systems. A workflow assigned to a system is applicable to all the environments under it. For more information on managing metadata manager workflows, refer to the <u>Managing Metadata Manager Workflows</u> section.

To view workflow logs of systems, follow these steps:

1. In the **System Catalogue** pane, right-click a system.

f	D	ATA INTELLIGENO	CE SUITE				Metadata Manage	r				
sy	ster	n Catalogue		<	٩	I	Data Dictionary	S	System Details	Extende	ed Properties	Data Linea
	ê	Sensitive Data			s	No	Document Nam	e	Document Link		Document Status	Doci Inte Own De
		Metadata										
	►	🖵 erwin DI Suite	Now E	nuira		. +						
	►	🖵 erwin DM	New E	ocur	nent	n			https://erwin.com/bo	okshelf/10.1	<u>)</u> InProgress	
	Þ	🖵 erwinDISPoC	📝 Edit Sy	/sten	n							
	Þ	🖵 Informatica	Delete	Syst	tem	la fa a						
þ	Þ	🖵 MS Excel	Report - System Infor			ctiona	ary					
	Þ	🖵 New	🕉 Run Te	empla	ate							
	►	🖵 Oracle	Config	ure E	Expan	nded L	_ogical Name					
	Þ	Salesforce	R View V	Vorkf	low							

2. Click View Workflow.

The View Workflow page appears. It displays the current stage of the system.



Use the following options to work on the workflow:

User Comments () 鯅)

Use this option to view users and the comments entered by the users in each stage.

Expand/Hide Users and Roles

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

Collapse/Expand Roles

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

Collapse/Expand Users

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

Export Image

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

Associating Systems

You can associate systems with business assets, systems, environments, tables, and columns. You can view these associations on mind maps and analyze association statistics.

Ensure that:

- Business assets are enabled. You can add new business assets and enable them in the Business Glossary Manager Settings.
- Relationship between system and the asset type is defined. You can define associations and relationships in the Business Glossary Manager Settings.

To associate systems with asset types, follow these steps:

- 1. In the **System Catalogue** pane, click the required system.
- 2. In the central pane, click the **Associations** tab.
- 3. Select the asset type from the drop down.

▲ Data Dictionary	System Details	Associations	Mind Map
Business Term	× •		
Business Term	m Nam	e Desc	intion
DATA DOMAIN		e Desci	pion
Table			

4. Click +.

🗖 Relatio	onship Associations					-	□ ×			
						Save Cano	:el			
Current C	Context:	Erwin_Sales								
Current C	Context Type:	System	System							
Relations	hip Name:	is associate	ed with			-				
Search (p	partial matches):									
	Term Name	Description	Definition	Catalog Name	Catalog Hierarchy	Data Steward				
	3rd Party Preference Option Code		Records the option the Customer has chosen not to be offered products from 3rd Party's e.g. selling	Customer Management	Customers Business → Customers Business As Is → Information → Customer Management	janedoe				
	44900		Incision and drainage of appendiceal abscess; open	DATA ELEMENTS	NASDAQ HEALTHCARE - IMP 1 → DATA ELEMENTS	N/A				
	44900		Incision and drainage of	DATA ELEMENTS	NASDAQ HEALTHCARE - IMP					
1 - 2	3 4 5 →	Records from 1	to 10 of 765							

- 5. Select **Relationship Name**, and the asset type.
- 6. Click Save.

The asset is added to the system.

•	Data Dictionary	System D	Details Association	s Mind Map Sys	stem Documents Extend	ded Properties Conf	igure Extended Properties	Scheduled Jobs
Busi	ness Term	•						
	Actions	Relationshir Name	Term Name	Description	Definition	Catalog Name	Catalog Hierarchy	Data Steward
	/ 1	is associated with	3rd Party Preference Option Code		Records the option the Customer has chosen not to be offered products from 3rd Party's e.g. selling	Customer Management	Customers Business → Customers Business As Is → Information → Customer Management	janedoe

Use the following options under the **Actions** column:

Edit Association (🖍)

Use this option to edit the association.

Delete Association ($\overline{\mathbf{D}}$)

Use this option to delete the association.

To view mind map, click the **Mind Map** tab. For more information on working on mind map, refer to the <u>Viewing Mind Maps</u> topic.

Configuring Expanded Logical Name

You can update the expanded logical name for multiple tables/columns by scheduling a configuration job. The job updates the expanded logical name based on the table/column name, associated business term's name, and the associated business term's definition.

Note: You should configure expanded logical name of tables and columns after scanning metadata.

You can run the job at both, system and environment levels:

- **System level**: The expanded logical name is applied to all the tables and columns under the system. This includes all the environments under the system.
- **Environment level**: The expanded logical name is applied to all the tables and columns under the environment.

For example, consider a scenario where you want to schedule a job to configure the expanded logical name of a table, RM_Resource and a column, Resource_ID. The parameters of the job are a business term catalog that has a business term, Resource, its definition, Sales Representative, and a splitter, Underscore (_). Refer to the following table to understand the parameters and their values:

Entity	Value	Comment
Splitter (spe- cified while scheduling the job)	_(Underscore)	
Table Name	RM_Resource	Here, the part after the underscore (splitter), Resource, matches the Business Term. Therefore, it will be replaced with the business term definition and the part before the under- score, RM, will be retained in the expanded logical name.
Column Name	Resource_ID	Here, the part before the underscore, Resource, matches with the Business Term. Therefore, it will be replaced with the busi- ness term definition and the part after the underscore, ID will be retained in the expanded logical name.
Business	Resource	This should match with a part of the table and column names

Entity	Value	Comment
Term		above.
Business Term Defin- ition	Sales Rep- resentative	 In the updated expanded logical name, this will replace the part of the table/column name that matches the business term name. That is: For the table, RM will be retained and Resource will be replaced with Sales Representative.
		 For the column, ID will be retained and Resource will be replaced with Sales Representative.
Expanded Logical Name	<blank></blank>	Expanded logical name is formed from the business term defin- ition and part of table or column names.

After the job runs successfully, the expanded logical name of the table and column is updated as mentioned in the following table:

Entity	Expanded Logical Name	Comment
Table	RM Sales Rep-	Here, RM retained from the table name and Sales Representative is
	resentative	added from business term definition.
Column	Sales Rep-	Here, ID is retained from the column name and Sales Rep-
Column	resentative ID	resentative is added from business term definition.

To configure expanded logical name, follow these steps:

1. In the **System Catalogue** pane, right-click a system or environment.

The available options appear.

H	D.	ATA INTELLIGENC	CE SUITE			Metadat	a Manage	er				
Sy	ster	n Catalogue		<	•	Data Dio	tionary	Syst	em Details	Extende	d Properties	Data Linea
	â	Sensitive Data		•	Busi	ness Term		•				
		Metadata			A	ctions	Relat	tionship Nam	e	Term Name	Des	cription
	Þ	🖵 erwin DI Suite	New Er	nviro	nment							
	Þ	🖵 erwin DM	E New Do	ocun	nent							
	Þ	🖵 erwinDISPoC	📝 Edit Sy	sten	ı							
	Þ	🖵 Informatica	Delete	Syst - Sy	em stem Info	rmation						
D	۲	🖵 MS Excel	Report	- Da	ta Dictior	nary						
	►	🖵 New	🕉 Run Te	mpla	ate							
	Þ	🖵 Oracle	Configu Configu	ire E 'orkf	xpanded low	Logical Nar	ne					
	b.	Salesforce		_								

2. Click Configure Expanded Logical Name.

The Configure Expanded Logical Name page appears.

Catalogs	
Spiiter	
Spiitter _(underscore)	
Splitter _(underscore) Job Name*	
Splitter(underscore) Job Name* Administrator1580049338831	
Splitter _(underscore) Job Name* Administrator1580049338831 Interval	
Splitter _(underscore) Job Name* Administrator1580049338831 Interval Once	
Splitter(underscore) Job Name* Administrator1580047338831 Interval Once	
Spitter(underscore) Job Name* Administrator1580049338831 Interval Once Schedule Job On* O Local O Server	

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

Field Name	Description
Catalogs	Select the catalog containing the required business term.
Splitter	Select appropriate splitter based on the table name or column name.
Job Name	A default job name is autopopulated. You can modify it and enter a job name.
Interval	Select an interval of the job. Interval sets the frequency of the job. For example: If you set the interval every week then the job will be executed every week.
Local or Server	 Select the machine whose clock decides the time of the scheduled scan. Local: Refers to your local machine. Server: Refers to the machine where erwinDIS has been deployed.
Schedule Job On	Select date and time of the execution of the job.
Notify Me	Turn the Notify Me to ON to receive a notification email about the sched- uled job.
Notification Email	This field is autopopulated with your email ID. You receive email noti- fications about the scheduled job from the Admin Email ID, configured in the Email Settings. For more information on configuring Admin Email ID, refer to the <u>Configuring Email Settings</u> topic.
CC List	Enter a comma-separated list of email IDs that should receive the job notification.

4. Click 💾.

The job is scheduled and added to the Scheduled Jobs list on the **Scheduled Jobs** tab.

↓ Data [Dictionary System Details Associations Mind Map System Documents Extended Properties Configure Extended Properties Scheduled Jobs										
Schedule	d Jobs										f
ь Туре	Environment Name	Scheduled Objects	Previous Fire Time	Next Fire Time	Job State	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
tadata panded gical me	Erwin_Sales	All Environments		01-27-2020 12:04	NORMAL	Administrator	2020-01-27 12:03:11.498	Administrator	2020-01-27 12:03:11.498	1	Ŵ

You can edit the job using \checkmark or delete it using $\widehat{\mathbb{I}}$.

The job is executed at the scheduled time and the expanded logical names of tables and columns are updated.

Columns Table Prope	rties Associations	Mind Map	Data Quality	Documents	Extended Properties	Indexes	Impact Analysis	Forward Lineage
- Technical Properties								
Table Name	dbo.RM_RESOURCE				Environment Name	Integra	tion	
System Name	Erwin_Sales				No of Rows	4		
Synonym Reference					FileType			
					Workflow Status	Draft		
- Business Properties								
Data Steward	janedoe				Logical Table Name	Resource	се	
Table Definition	Tab Def				Expanded Logical Name	e RM Sale	es Representative	
Table Comments	Sales resource 2020				Used In Gap Analysis	\checkmark		
Table Class	Table_Class				Table Alias	SALESR	ESOURCE	
DQ Score	Very High (9-10)							

Column Properties	Associations Mind Ma	p Documents	Impact Analysis	Forward Lineage	Reverse Lineage	Extended Properties V	alid Values
Workflow Status	Draft						
– Business Properties –							
Data Steward	janedoe			Logical Column N	ame Res	ource ID	
Column Definition	represents resource	ID		Expanded Logica	Name	es Representative ID	
Column Comments	Column ID as per 2	020		Used In Gap Analy	/sis		
Sensitive Data Indicator (SDI) Flag							
Sensitive Data Indicator (SDI) Classification	Confidential			Sensitive Data Ind (SDI) Description	cator Sen	sitive Data that if compromised	lc
Column Class	Column_Class			Column Alias	RES	OURCEID	
DQ Score	Very High (9-10)			Business Key Flag			

Note: You can use this job to update the expanded logical name only once. Alternately, you can update expanded logical names under <u>table properties</u> and <u>column</u> <u>properties</u>.

Managing Systems

Managing systems involves:

- Editing or deleting systems
- Exporting systems information

To manage systems, follow these steps:

1. In the System Catalogue pane, right-click a system.

The available options appear.

Sy	ster	n Catalogue		<	4	System Details		Extended Pr	operties	Data Lir	neage
	â	Sensitive Data		•	So	heduled Jobs					
4	ł	Metadata			#	Job Name		Job Type	Environ	ment	Sched
	►	🖵 erwin DI Suite	New Er	vironn	nent				Hume		
	Þ	🖵 erwin DM	B New D	ocume	nt		1				
	Þ	🖵 erwinDISPoC	📝 Edit Sy	stem			1	Metadata 4 Expanded	N/A		All Enviro
	Þ	🖵 Informatica	Delete	Systen - Syste	n em l	nformation	ł	Logical Name			
]	►	🖵 MS Excel	Report	- Data	Dic	tionary					
	►	🖵 New	🕉 Run Te	mplate							
	Þ	🖵 Oracle	Configu	ire Exp orkflov	oano v	led Logical Name					
	Þ										

2. Use the following options:

Edit System

Use this option to edit the system details.

Delete System

Use this option to delete systems that are not required. Ensure that you delete all the environments under a system before deleting it.

Report - System Information

Use this option to view and export system information.

To view system information report, click **Report - System Information**. The System Information Report page appears.

System Information Kep	ort										
			Select System: en	winDIS		▼ Expo	rt: 🔌 🔁 🕙 🖷				
		Syste	em Information Report								
System Details											
System Name:	erwinDIS		Primary Move Type (Source/Target):	Source						
Data Steward:	janedoe		Special Instructions:								
Business Purpose:	Source system for the Data is	itegration project.	Server OS Version:		Ubuntu 18.04.1	Ubuntu 18.04.1					
Server Platform:	Linux		DBMS Version:	DBMS Version: File Location: ESB Q Manager Name: Total Number Of Tables:							
DBMS Platform:	SQL server		File Location:								
File Managerment Type:			ESB Q Manager Nan								
ESB Platform Type:	Mule		Total Number Of Tak								
Release:			End of Day Definition	.:							
Total DB Size:	1100MB		Average Users:								
Batch Extract Window:			Owner Full Name:								
Average Concurrent Users:	2		Email Address:								
Telephone Number:											
System Environment Detai	ils										
# Environment Name	Environment Type	Data Steward	Database Name	Database Type	IP Address	Port	User Name				
1 Data_Migration	Production	jdoe	ErwinDIS931	SqlServer	localhost	1433	88.				
2 erwinDIS	test		ErwinDIS931	SqlServer	localhost	1433	88.				
3 erwinDIS1	test		erwinDG_v9_GA	SqlServer	localhost	1433	83				

From the **Select System** list, select a system to view its report.

Export to HTML (): Use this option to export the report in the HTML format.
Export to PDF (): Use this option to export the report in the PDF format.
Export to Excel (): Use this option to export the report in the XLSX format.
Export to Word (): Use this option to export the report in the DOCX format.
Export to RTF (): Use this option to export the report in the RTF format.

Creating and Managing Environments

Metadata is stored and categorized into systems and environments. Multiple environments are contained in a system. Whereas environments can denote a database, flat file, data models, etc. Environments contain database objects like Tables, Columns, Views, Synonyms, etc.

You can create environments under a system and scan metadata from a data source by providing connection parameters in the environment.

Creating and managing environments involves:

- Creating environments
- Assigning roles and users to environments
- Managing environments
- Updating Sensitivity
- Viewing Sensitive Data Dashboard
- Uploading documents
- Cloning environments
- Viewing ER diagrams
- Viewing workflow logs
- Associating Environments
- Configuring Business Properties
- Configuring Expanded Logical Name of Tables/Columns
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.

ł	D,	ATA INTELLIGENC	E SUI	TE		Metadata Mana	ige	r					Â
System Catalogue <			<	4	System Details		Extended F	Properties	Data I	ineage	Mind Map		
	🔒 Sensitive Data		-	S	cheduled Jobs								
A	Metadata			#	Job Name		Job Type	Environ Name	ment	Sched	uled Objects	Previ Fire 1	
	erwin DI Suite New Envir		ew Enviro	onment									
		erwin_Sale		ew Docur	nent			Motadata					
	Þ	🖵 erwin DM	📝 Eo	📝 Edit System				4 Expanded N/A	N/A	All Envir	All Enviro	onments	
	Þ	🖵 erwinDISPoC		elete Sys	tem	Information		Logical Name					
	►	🖵 Informatica	Report - Data Dictionary										
	Þ	🖵 MS Excel	3 R	🛪 Run Template									
	Þ	🖵 New		Configure Expanded Logical Name									
	►	🖵 Oracle											

3. Click New Environment.

The New Environment page appears.

New Environment Configuration Details	Miscellaneous		
System Environment Name*			
System Environment Type*			
Data Steward	-Select Data Steward-		
Server Platform			
Server OS Version			
File Management Type			Please Select DataBase Type
File Location			
Production System Name	Choose Production System 🔻		
Production Environment Name	¥		
Version	1.00		
Version Label			
Associated Business Term	•	×	
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-
rile Widii-	based source).
agement type	For example, MS Excel.
File Location	Specifies a file path (if the environment is a file-based source).
	For example, C:\Users\Jane Doe\erwin\Mike - Target System
Dreduction Cus	Specifies the system name being associated with the environment as
tom Namo	the production system.
	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 <u>Configuring Sensitivity Classifications</u> 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.
Intondod I Iso	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
	the metadata.
Approval	Specifies any instructions for the environment's approval.
Approva	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

SQL Server

You can create two types of SQL Server environments:

- SQL authentication
- Windows authentication

Both the environments have same:

- Prerequisites
- Privileges
- JDBC driver details
- TLS connection details

There is a small difference between the two modes in JDBC connection parameters.

Prerequisites

Pre-requisite steps for establishing successful connection:

- 1. Creation of dedicated service account for erwin with Metadata Read-only privileges in SQL Server Database
- 2. Firewall connection open between SQL Server and erwin DI Suite application server
- 3. Opening of SQL Server database port to accept connections from erwin DI Suite application server

Privileges

Following are the privileges given to service account for:

- Metadata scanning: Grant view definition on Schema
- Data preview: Db_datareader

JDBC Driver Details

SQL Server JDBC driver is out of box packaged with erwin DI Suite application. Hence, no JDBC driver configuration is required from end user standpoint.

TLS Connection Details

- The SQL Server JDBC driver supports connection via TLS 1.2.
- The TLS protocol parameter needs to be added to JDBC URL string to ensure that the connection is via TLS. Otherwise, the source database will reject any incoming request in non-TLS mode.
- JDBC URL being used to connect via TLS: jdbc:sqlserver://SERVER_NAME:PORT#;databaseName=AdventureWorks;sslProtocol=TLSv1.2
- Additional parameters to configure (if needed): integratedSecurity=true;encrypt=true;trustServerCertificate=true;

JDBC Connection Parameters

To enter SQL Server (SQL authentication) connection parameters, follow these steps:

1. Select the **Database Type** as **SqlServer** while creating the environment.



When you select database type as Sql Server, the following connection parameters appear on the right hand side.

com.microsoft.sqlserver.jdbc.SQLServe
ErwinDIS931
localhost
1433
sa
•••••
Save Password
jdbc:sqlserver://localhost:1433;datab
DBO
HIKARICP 🗸
2
3
5
*

2. Enter appropriate values in the fields (connection parameters). The fields marked with a red asterisk are mandatory.

Field Name	Description
Driver Name	Specifies the JDBC driver name for connecting to the database.
Driver Name	For example, com.microsoft.sqlserver.jdbc.SQLServerDriver
DRMS	Specifies the SQL Server database name being used to connect to the
Name/DSN	environment.
	For example, ErwinDIS931.
IP	Specifies the IP address or server host name of the database.
Address/Host Name	For example, localhost.
	Specifies the port to connect with the database.
Port	1433 is the default port for a Sql Server database type. You can
	change it, if required.
Licor Namo	Specifies the SQL Server (Service Account) user name.
User Marrie	For example, sa.
Password	Specifies the SQL Server (Service Account) password.
Passworu	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.
	Specifies the schema of the database.
DBMS Schema	Use this option to select multiple or narrow down to single schema.
	For example, DBO.
Connection	Specifies the connection pool type being used to connect via JDBC.
Pool Type	For example, HIKARICP and BONECP.
Number of Par-	Specifies the number of partitions of the database.
titions	It is autopopulated with default number of partitions. You can edit

Field Name	Description
	and provide the number of partitions as required. For example, 2.
Minimum Con	Specifies the minimum connections per partitions of the database.
nections Per	It is autopopulated with default minimum connections per partitions.
Partitions	You can edit and provide the minimum connections per partitions as
	required. For example, 3.
Maximum Con	Specifies the maximum connections per partitions of the database.
	It is autopopulated with default maximum connections per partitions.
Partitions	You can edit and provide the maximum connections per partitions as
	required. For example, 5.

To use database options, click 🔍.

The Database Options page appears. It displays the available database options.

Database Options	_ 🗆 ×
	V
Кеу	Value
Transaction Isolation	TRANSACTION_READ_COMMITTED
Read Only	false
Auto Commit	true
Test Connection Query	
Include Synonyms (Only Oracle)	false
Scan Nested Synonyms	false
Query Batch Limit	999
Oracle Enable SSL Connection	false
Oracle Wallet Location	
Oracle PKI Provider Position	3
Oracle SSL Server DN Match	false

Select keys and double-click the cells under the **Value** column to set the values of the keys. Use \checkmark to save the database options.

To enter SQL Server (Window authentication) connection parameters, follow these steps:

1. Select the Database Type as Sql Server (Windows Authentication).



When you select database type as **Sql Server (Windows Authentication)**, the following connection parameters appear on the right hand side.

Driver Name*	net.sourceforge.jtds.jdbc.Driver	
DBMS Name/DSN*	ErwinDIS931	
P Address/Host Name*	localhost	
Domain		
lser Name*	sa	
assword*	•••••	
	Save Password	
lrl*	jdbc:jtds:sqlserver://localhost/ErwinDl!	
DBMS Instance Schema	DBO	
Connection Pool Type*	HIKARICP ~	
Number of Partitions*	2	
Ainimum Connections Per Partitions*	3	
Maximum Connections Per Partitions	5	
Options		ŝ

2. Enter appropriate values in the fields (connection parameters). The fields marked with a red asterisk are mandatory.

Field Name	Description
Driver	Specifies the JDBC driver name for connecting to the database.
Name	For example, com.microsoft.sqlserver.jdbc.SQLServerDriver
DBMS Name/DSN	Specifies the SQL Server database name being used to connect to the environment. For example, FrwinDIS931
IP Address/H- ost Name	Specifies the IP address or server host name of the database. For example, localhost.
Domain	Specifies the network domain name on which database resides. For example, U-DOM1.
Port	Specifies the port to connect with the database. 1433 is the default port for a Sql Server database type. You can change it, if required.
User Name	Specifies the SQL Server (Service Account) user name. For example, sa.
Password	Specifies the SQL Server (Service Account) password. For example, goerwin@1.
URL	Specifies the full JDBC URL that is used to establish a connection to the database. It is autopopulated based on the other parameters. jdbc:jtds:sqlserver://SERVER_NAME:PORT#;data- baseName=DatabaseName;domain=DomainName;useNTLMv2=true;
DBMS Schema Con-	Specifies the schema for the database. Use this option to select multiple or narrow down to single schema. For example, DBO. Specifies the connection pool type being used to connect via IDBC

Field Name	Description
nection Pool Type	For example, HIKARICP and BONECP.
Number of Partitions	Specifies the number of partitions for the database. It is autopopulated with default number of partitions. You can edit and provide the number of partitions as required. For example, 2.
Minimum Con- nections Per Par- titions	Specifies the minimum connections per partitions for the database. It is autopopulated with default minimum connections per partitions. You can edit and provide the minimum connections per partitions as required. For example, 3.
Maximum Con- nections Per Par- titions	Specifies the maximum connections per partitions for the database. It is autopopulated with default maximum connections per partitions. You can edit and provide the maximum connections per partitions as required. For example, 5.

To use database options, click 🔯.

The Database Options page appears. It displays the available database options.

Database Options	_ _ ×
	Solution
Кеу	Value
Transaction Isolation	TRANSACTION_READ_COMMITTED
Read Only	false
Auto Commit	true
Test Connection Query	
Include Synonyms (Only Oracle)	false
Scan Nested Synonyms	false
Query Batch Limit	999
Oracle Enable SSL Connection	false
Oracle Wallet Location	
Oracle PKI Provider Position	3
Oracle SSL Server DN Match	false

Select keys and double-click the cells under the **Value** column to set the values of the keys. Use **V** to save the database options.

Oracle

You can create Oracle environments and can also enable RAC/Service to:

- Use Oracle cluster database
- Capture Oracle Service name in DSN field

Before creating an Oracle environment, you should take a note of the following:

- Prerequisites
- JDBC driver details
- TLS connection details
- JDBC connection parameters

Prerequisites

Prerequisite steps for establishing successful connection:

- Creation of dedicated service account for erwin with Metadata read-only privileges in Oracle database
- Firewall connection open between Oracle and erwin DI Suite application server
- Oracle Database port opened to accept connections from erwin DI Suite application server

JDBC Driver Details

Oracle JDBC driver is out of box packaged with erwin DI Suite application. Hence, no JDBC driver configuration is required from end user standpoint.

TLS Connection Details

 Oracle JDBC 8 driver provides native TLS 1.2 support and upgrading the driver to JDBC 8 will provide the necessary resolution. Once the product is upgraded to the oracle JDBC 8 driver, TLS connectivity can be ensured by setting a few system parameters and also adding TLS parameters to the JDBC URL string to support connectivity using TLS 1.2

URL Format: jdbc:oracle:thin:@<Ip Address>:<Port>/< service name>+TLS params

JDBC Connection Parameters

To enter Oracle connection parameters, follow these steps:

1. Select Database Type as Oracle while creating the environment.

Configuration Details	Miscellaneous
Status	
System Environment Name*	Integration
System Environment Type*	Production
Data Steward	MS Excel File
Server Platform	CSV (Flat File) XMI MS Access File
Server OS Version	ERwin ERwin 9
File Management Type	CWM XMI (v1.1) XSD
File Location	Db2
Production System Name	MySql IBM Netezza
Production Environment Name	Oracle Greenplum Popyative
Version	SAP
Version Label	SqlServer Sql Server (Windows Authentication) Sybase
DQ Score	Salesforce Snowflake
Database Type*	Teradata Amazon Redshift HP Vertica
Note : If you change database type yo changed database type.	e Big Data - Cloudera Big Data - Hortonworks
RAC / Service Name	Big Data - MapR Other

Note: You can select the RAC/Service check box to :

- Use Oracle cluster database
- Capture Oracle Service name in DSN field

The following connection parameters appear on the right hand side.

Driver Name*		
	oracle.jdbc.driver.OracleDriver	
DBMS Name/DSN*	EnvinDI\$931	
ID A state of (Look Manage *	LIWIND 5751	
IF Address/Host Name	localhost	
Port	1501	
	1321	
User Name*	sa	
Password*		
	••••••	
	🟹 Save Password	
Url*		
	acle:thin:@localhost:1521/ErwinDIS931	
DBMS Instance Schema	DBO	2
		-
Connection Pool Type*	HIKARICP ~	
Number of Partitions*	2	
Minimum Connections Per Partitions*	-	
Winning Connections For Formations	3	
Maximum Connections Per Partitions*	5	
Orthur	5	
Options		Ô
		-

2. Enter appropriate values in the fields (connection parameters). The fields marked with a red asterisk are mandatory.

Field Name	Description
	Specifies the JDBC driver name for connecting to the database.
Driver Name	For example, oracle.jdbc.driver.OracleDriver
DBMS	Name of the Oracle Service – SID or TNS Service Name.
Name/DSN	For example, ErwinDIS931.
IP Address/Host Name	Enter the IP address or server host name. For example, 10.32.445.21
Port	Specifies the port to connect with the database. 1521 is the default port for the Oracle database. User can change it, if required.
User Name	Enter the Oracle (Service account) user name. For example, erwinuser.
Password	Enter the Oracle (Service account) password. For example, goerwin@1.

Field Name	Description
	It is autopopulated based on the other parameters.
URL	For example, jdbc:oracle:thin:@ <ip address="">:<port>/< service</port></ip>
	name>
DDMC lasts at	Specifies the name of the database schema.
Schema	For example, DBO.
Seriema	Use this option to select multiple or narrow down to single schema.
Connection	Specifies the connection pool type being used to connect via JDBC.
Pool Type	For example, HIKARICP and BONECP.
roorrype	Select the appropriate connection pool type.
Number of Par-	Specifies the number of partitions of the database.
titions	It is autopopulated with default number of partitions. You can edit
	and provide the number of partitions as required. For example, 2.
Minimum Con-	Specifies the minimum connections per partitions of the database.
nections Per	It is autopopulated with default minimum connections per partitions.
Partitions	You can edit and provide the minimum connections per partitions as
	required. For example, 3.
Maximum Con	Specifies the maximum connections per partitions of the database.
nections Per	It is autopopulated with default maximum connections per partitions.
Partitions	You can edit and provide the maximum connections per partitions as
	required. For example, 5.

3. Click to use database options.

The Database Options page appears. It displays the available database options.

Database Options	_ _ ×
	Solution
Кеу	Value
Transaction Isolation	TRANSACTION_READ_COMMITTED
Read Only	false
Auto Commit	true
Test Connection Query	
Include Synonyms (Only Oracle)	false
Scan Nested Synonyms	false
Query Batch Limit	999
Oracle Enable SSL Connection	false
Oracle Wallet Location	
Oracle PKI Provider Position	3
Oracle SSL Server DN Match	false

To use the database options, select keys and double-click the cells under the **Value** column to set the values of the keys. Use **V** to save the database options.

MySQL

You can create MySQL environments by providing the necessary connection parameters. Before creating a MySQL environment, you should take a note of the following:

- Prerequisites
- JDBC driver details
- TLS connection details
- JDBC connection parameters

Prerequisites

Prerequisite steps for establishing successful connection:

- Creation of dedicated service account for erwin with Metadata read-only privileges in MySQL database
- Firewall connection open between MySQL and erwin DI Suite application server
- MySQL Database port opened to accept connections from erwin DI Suite application server

JDBC Driver Details

MySQL JDBC driver is out of box packaged with erwin DI Suite application. Hence, no JDBC driver configuration is required from end user standpoint.

TLS Connection Details

- The MySQL JDBC driver supports connection via TLS 1.2. The TLS protocol parameter needs to be added to JDBC URL string to ensure that the connection is via TLS.
- JDBC URL being used to connect via TLS: jdbc:mysql://IPADDRESS:3306/DATABASENAME ?useSSL=true &enabledTLSProtocols=TLSv1.2

JDBC Connection Parameters

To enter MySQL connection parameters, follow these steps:

1. Select Database Type as MySQL while creating the environment.

Configuration Debails Missellen aus		
Configuration Defails	Miscelianeous	
Status		
System Environment Name*	Integration	
System Environment Type*		
system Environment type	Production	
Data Steward	MS Excel File	
	CSV (Flat File)	
	XMI	
Server Platform	MS Access File	
	ERwin	
Server OS Version	ERwin 9	
	CWM XMI (v1.1)	
File Management Type	XSD	
	JSON	
File Location	Db2	
	MySql	
Production System Name	IBM Netezza	
	Oracle	
Production Environment Name	Greenplum	
	Pervasive	
Version	SAP	
	SqlServer	
Version Label	Sql Server (Windows Authentication)	
	Sybase	
DQ Score	Salesforce	
	Snowflake	
Database Type*	Teradata	
	Amazon Redshift	
	HP Vertica	
Note : If you change database type yo	Big Data - Cloudera	
changed database type.	Big Data - Hortonworks	
	Big Data - MapR	
	Other	

The following connection parameters appear on the right hand side.

Driver Name*	com.mysql.jdbc.Driver
DBMS Name/DSN*	ErwinDIS931
IP Address/Host Name*	localhost
Port	3306
User Name*	sa
Password*	•••••
	Save Password
Url*	jdbc:mysql://localhost/ErwinDIS931
Connection Pool Type*	HIKARICP 🗸
Number of Partitions*	1
Minimum Connections Per Partitions*	3
Maximum Connections Per Partitions*	5
Options	
Options	

2. Enter appropriate values in the fields (connection parameters). The fields marked with a red asterisk are mandatory.

Field Name	Description	
	Specifies the JDBC driver name for connecting to the database.	
Driver Name	For example, com.mysql.jdbc.Driver	
DBMS	Enter the MySQL database name.	
Name/DSN	For example, ErwinDIS931.	
IP	Enter the IP address or server host name.	
Address/Host Name	For example, 10.32.445.21	
	Specifies the port to connect with the database.	
Port	3306 is the default port for the MySQL database. You can change it, if required.	
Liss Nisses	Enter the MySQL (Service account) user name.	
User Name	For example, erwinuser.	
Password	Enter the MySQL (Service account) password.	

Field Name	Description	
	For example, goerwin@1.	
	Specifies the full JDBC URL that is used to establish a connection with	
URL	the database.	
_	It is autopopulated based on the other parameters.	
	For example, jdbc:mysql://IPADDRESS:3306/DATABASENAME	
Connection	Specifies the connection pool type being used to connect via JDBC.	
Pool Type	For example, HIKARICP and BONECP.	
Number of Par-	Specifies the number of partitions of the database.	
titions	It is autopopulated with default number of partitions. You can edit	
	and provide the number of partitions as required. For example, 1.	
Minimum Con-	Specifies the minimum connections per partitions of the database.	
nections Per	It is autopopulated with default minimum connections per partitions.	
Partitions	You can edit and provide the minimum connections per partitions as	
	required. For example, 3.	
Maximum Con-	Specifies the maximum connections per partitions of the database.	
nections Per	It is autopopulated with default maximum connections per partitions.	
Partitions	You can edit and provide the maximum connections per partitions as	
	required. For example, 5.	

To use the database options, click 🔯.

The Database Options page appears. It displays the available database options.

Database Options	_ _ ×
	Solution
Кеу	Value
Transaction Isolation	TRANSACTION_READ_COMMITTED
Read Only	false
Auto Commit	true
Test Connection Query	
Include Synonyms (Only Oracle)	false
Scan Nested Synonyms	false
Query Batch Limit	999
Oracle Enable SSL Connection	false
Oracle Wallet Location	
Oracle PKI Provider Position	3
Oracle SSL Server DN Match	false

Select keys and double-click the cells under the **Value** column to set the values of the keys. Use **V** to save the database options.

Snowflake

You can create Snowflake environment by providing the necessary connection parameters. Before creating a Snowflake environment, you should take a note of the following:

- Prerequisites
- JDBC driver details
- TLS connection details
- JDBC connection parameters

Prerequisites

Prerequisite steps for establishing successful connection:

- Creation of dedicated service account for erwin with Metadata read-only privileges in Snowflake database
- Snowflake Database ports 443 and 80 should be opened via firewall to accept connections from erwin DI Suite application server

JDBC Driver Details

Currently Snowflake JDBC driver is not packaged with erwin DI Suite application. Hence, Snowflake JDBC driver should be downloaded from the below mentioned URL.

Download URL: <u>https://docs.snowflake.net/manuals/user-guide/jdbc-down-load.html#downloading-the-driver</u>

Location to configure the JDBC driver: Once downloaded, the snowflake drivers should be placed in the following path in erwin DI Suite application server. \Apache Software Found-ation\<Tomcat X.X>\webapps\erwinDISuite\WEB-INF\lib

TLS Connection Details

 The Snowflake packaged JDBC driver version 3.1.X and above implement TLS v1.2 providing the latest security patches on the protocol. So, you will not need to set any additional properties. The connection will use TLS 1.2 encryption by default.

 Add SSL Parameter in Connection String (if required): jdbc:snowflake://<accountname>.snowflakecomputing.com/ ?warehouse=DataWarehouseName&db=DatabaseName&schema= SchemaName&ssl=on

JDBC Connection Parameters

To enter Snowflake connection parameters, follow these steps:

1. Select Database Type as Snowflake while creating the environment.

Configuration Details	Miscellaneous	
SIGIUS		
System Environment Name*	Integration	
System Environment Type*	Production	
Data Steward		
	MS Excel File	
Cara van Diattér van	CSV (Flat File)	
server hattorm	XMI	
0	MS Access File	
server us version	EKWIN ERusia O	
File Management Tures		
nie wanagement type		
File Logation	ISON	
File Location	Db2	
Production System Mana	MySal	
Froduction system Name	IBM Netezza	
Production Fourierenant Name	Oracle	
Froquetion Environment Name	Greenplum	
Version	Pervasive	
4613011	SAP	
Vertien Label	SqlServer	
Version Laber	Sql Server (Windows Authentication)	
DO Seere	Sybase	
DQ SCOLE	Salesforce	
Detek we Taret	Snowflake	
Database Type*	Teradata	
	Amazon Redshift	
Note : If you change database type y	HP Vertica	
changed database type.	Big Data - Cloudera	
	Big Data - Hortonworks	
	Big Data - MapR	
	Other	

The following connection parameters appear on the right hand side.

Driver Name*	net.snowflake.client.jdbc.SnowflakeD]
DBMS Name/DSN*	ErwinDIS931]
IP Address/Host Name*	localhost]
Port	443]
User Name*	sa	
Password*	•••••	
	Save Password	
Url*	jdbc:snowflake://localhost:null/?db=E]
DBMS Instance Schema	DBO	
Connection Pool Type*	HIKARICP \lor	
Number of Partitions*	1	
Minimum Connections Per Partitions*	3	
Maximum Connections Per Partitions*	5	
Options		ŵ
		-

2. Enter appropriate values in the fields (connection parameters). The fields marked with a red asterisk are mandatory.

Field Name	Description	
Driver Name	Specifies the JDBC driver name for connecting to the database.	
	For example, com.snowflake.client.jdbc.SnowflakeDriver	
DBMS	Enter the Snowflake database name.	
Name/DSN	For example, AW2012_DV.	
IP	Enter <accountname> snowflakecomputing com</accountname>	
Address/Hos-		
t Name	For example, analytixds.us-east-1.snowflakecomputing.com	
	Specifies the port to connect with the database.	
Port	443 is the default port for the Snowflake database. You can change it, if	
	required.	
Lloor Namo	Enter the Snowflake (Service account) user name.	
User Name	For example, shawn.	
Deceword	Enter the Snowflake (Service account) password.	
Password	For example, goerwin@1.	

Field Name	Description
	Specifies the full JDBC URL that is used to establish a connection with the database.
	It is autopopulated based on the other parameters.
	For example,
URL	jdb-
	c:snowflake:// <accountname>.snowflakecomputing.com/</accountname>
	?warehouse=DataWarehouseName&db=DatabaseName&
	schema=SchemaName
DBMS Specifies the schema of the database.	
Instance	Use this option to select multiple or narrow down to single schema.
Schema	
Connection	Specifies the connection pool type being used to connect via JDBC.
Pool Type	For example, HIKARICP and BONECP.
Number of	Specifies the number of partitions of the database.
Partitions	It is autopopulated with default number of partitions. You can edit and
	provide the number of partitions as required. For example, 1.
Minimum	Specifies the minimum connections per partitions of the database.
Connections	It is autopopulated with default minimum connections per partitions.
Per Par-	You can edit and provide the minimum connections per partitions as
titions required. For example, 3.	
Maximum	Specifies the maximum connections per partitions of the database.
Connections	It is autopopulated with default maximum connections per partitions.
Per Par-	You can edit and provide the maximum connections per partitions as
titions	required. For example, 5.

To use the database options, click 🔯.

The Database Options page appears. It displays the available database options.

Database Options _ C		
Кеу	Value	
Transaction Isolation	TRANSACTION_READ_COMMITTED	
Read Only	false	
Auto Commit	true	
Test Connection Query		
Include Synonyms (Only Oracle)	false	
Scan Nested Synonyms	false	
Query Batch Limit	999	
Oracle Enable SSL Connection	false	
Oracle Wallet Location		
Oracle PKI Provider Position	3	
Oracle SSL Server DN Match	false	

Select keys and double-click the cells under the **Value** column to set the values of the keys. Use **V** to save the database options.

MS Dynamics CRM

You can create MS Dynamics CRM environment by providing the necessary connection parameters.

Before creating a MS Dynamics CRM environment, you should take a note of the following:

- Prerequisites
- JDBC driver details
- TLS connection details
- JDBC connection parameters

Prerequisites

Prerequisite steps for establishing successful connection:

- Creation of dedicated service account for erwin with Metadata read-only privileges in MS Dynamics CRM database
- CRM Server IP Address should be mapped with Host Names in the file called "Hosts" which is available in the location - C:\Windows\System32\drivers\etc
- Generate CRM Domain trusted Certificate in erwin application server using InstallCert.java and place the generated "jssecacerts" file in the location - C:\Program Files\AdoptOpenJDK\jdk-XXX\jre\lib\security

Reference: <u>https://www.mkyong.com/webservices/jax-ws/sun</u>certpathbuilderexception-unable-to-find-valid-certification-path-to-requested-target/

JDBC Driver Details

The MS Dynamics CRM JDBC driver is not packaged with erwin DI Suite application. Hence, customers needs to use the jdbc driver available at their end for MS Dynamics CRM (CDATA, Progress etc.)

You can download CDATA driver from the URL mentioned below.

Download URL: https://www.cdata.com/drivers/dynamicscrm/download/

Location to configure the JDBC driver: Once downloaded, the MS Dynamics CRM drivers should be placed in the following path in erwin application server: \Apache Software Found-ation\<Tomcat X.X>\webapps\erwinDISuite\WEB-INF\lib and restart the Tomcat.

TLS Connection Details

The CDATA MS Dynamics CRM driver uses SSL by default, so you will not need to set any additional properties. The connection will use TLS 1.2 encryption.

JDBC Connection Parameters

To enter MS Dynamics CRM connection parameters, follow these steps:



1. Select Database Type as Other while creating the environment.

The following connection parameters appear on the right hand side.

Driver Name-	edata.idbe.dvnamicserm.DvnamicsC	
DBMS Name/DSN*	Northwind	
IP Address/Host Name*	10.1.50.225	
Port	1433	
User Name*	lgadde@erwin123.onmicrosoft.com	
Password*	••••••	
	Save Password	
Url*	jdbc:dynamicscrm:user=lgadde@erw	i
DBMS Instance Schema	DynamicsCRM	9
Connection Pool Type*	HIKARICP •	
Number of Partitions*	1	
Minimum Connections Per Partitions*	3	
Maximum Connections Per Partitions*	5	
Options		Ô
		1

2. Enter appropriate values in the fields (connection parameters). The fields marked with a red asterisk are mandatory.

Field Name	Description	
	Specifies the JDBC driver name for connecting to the database.	
Driver Name	For example, cdata.jdbc.dynamicscrm.DynamicsCRMDriver	
DBMS	Enter the MS Dynamics CRM Database Name.	
Name/DSN	For example, CRM.	
IP	Enter the IP Address or Host Names of MS Dynamics CRM server.	
Address/Host Name For example, 10.45.21.123		
Port	443 is the default port for MS Dynamics CRM. You can change it, if	
	required.	
	Enter the MS Dynamics CRM (Service account) user name.	
User Name	For example, domain) or winus or	
	ror example, domain\erwinuser.	
Password	Enter the MS Dynamics CRM (Service account) password.	

Field Name	Description
	For example, goerwin@1.
	Specifies the full JDBC URL that is used to establish a connection with the database.
	It is autopopulated based on the other parameters.
URL	For example, jdb- c:dynamicscrm:User=UserName;Password=XXX;URL= <ms dynamics<br="">CRM URL>;</ms>
	Note : If user trying to connect CRM online version, then append the following value to above mentioned connection string
	CRM Version=CRM Online;
DBMS Instance	Specifies the schema of the database.
Schema	For example, DynamicsCRM.
Connection	Specifies the connection pool type being used to connect via JDBC.
Pool Type	For example, HIKARICP and BONECP.
Number of Dar	Specifies the number of partitions of the database.
titions	It is autopopulated with default number of partitions. You can edit
	and provide the number of partitions as required. For example, 1.
Minimum Con-	Specifies the minimum connections per partitions of the database.
nections Per	It is autopopulated with default minimum connections per partitions.
Partitions	You can edit and provide the minimum connections per partitions as
	required. For example, 3.
Maximum Con-	Specifies the maximum connections per partitions of the database.
nections Per	It is autopopulated with default maximum connections per partitions.
Partitions	You can edit and provide the maximum connections per partitions as
	required. For example, 5.

To use database options, click 💇.

The Database Options page appears displaying the different options available.

Database Options		
		Solution
	Кеу	Value
	Transaction Isolation	TRANSACTION_READ_COMMITTED
	Read Only	false
	Auto Commit	true
	Test Connection Query	
	Include Synonyms (Only Oracle)	false
	Scan Nested Synonyms	false
	Query Batch Limit	999
	Oracle Enable SSL Connection	false
	Oracle Wallet Location	
	Oracle PKI Provider Position	3
	Oracle SSL Server DN Match	false

Select keys and double-click the cells under the **Value** column to set the values of the keys. Use **V** to save the database options.

SAP

You can create SAP environments by providing the necessary connection parameters.

Before creating a SAP environment, you should take a note of the following:

- Privileges
- Prerequisites
- JDBC driver details
- TLS connection details
- JDBC connection parameters

Privileges

Privileges given to service account:

- User type = System
- User group = SUPER
- Authorization profile = S_DDIC

Prerequisites

Prerequisite steps for establishing successful connection:

- Creation of dedicated service account for erwin with Metadata read-only privileges in SAP system
- Open Firewall connection between SAP and erwin DI Suite application server
- Get the SAP System Number and Client details

JDBC Driver Details

The SAP JCO driver is not packaged with erwin DI Suite application. Hence, customer must get the JCO driver from their respective SAP team and deploy the same in erwin application server.

The following sapjco files are required:

- Sapjco.jar
- Sapjco3.dll

Location to place these files

- Copy sapjco.jar into webinf/lib folder
- Copy sapjco3.dll copy into windows/system32 folder

Note: The tool connects to the SAP system directly using SAP JCO drivers and not to SAP backend database.

TLS Connection Details

In order to use SSL with the JCO, we will need to:

- Set up the SAP system for SSL (SNC setup)
- Create a certificate (X509) for the user
- Pass the user as \$X509CERT\$ (check JCO doc)
- Pass some key from the cert as passwd in the JCO

JCO Connection Parameters

To enter SAP connection parameters, follow these steps:
1. Select Database Type as SAP while creating the environment.

Configuration Details	Miscellaneous
Status	
System Environment Name*	Integration
System Environment Type*	Production
Data Steward	MS Excel File
Server Platform	XMI MS Access File
Server OS Version	ERwin 9
File Management Type	CWM XMI (v1.1) XSD
File Location	JSON Db2
Production System Name	Mysqi IBM Netezza
Production Environment Name	Greenplum Reprosive
Version	SAP
Version Label	SqlServer Sql Server (Windows Authentication)
DQ Score	Salesforce Snowflake
Database Type*	Teradata Amazon Redshift
Note : If you change database type yo changed database type.	HP Vertica Big Data - Cloudera Big Data - Hortonworks Big Data - MapR Other

The following connection parameters appear on the right-hand side.

system Nomber		24
Client*		800
IP Address/Host Na	me*	10.1.50.59
Field Delimiter*		, [Comma]
User Name*		sapuser
Password*		•••••
		Save Password
Delete and Reload	I	
Existing CSV File		
CSV File	Drag-n-I click to s	Drop files here or select files for upload.

2. Enter appropriate values in the fields (connection parameters). The fields marked with a red asterisk are mandatory.

Field Name	Description
Suctor Number	Specifies the SAP System Instance Number (range 0-99).
System Number	For example, 24.
Client	Specifies the SAP Client number (range 000-999).
Client	For example, 800.
IP Address/Host	Specifies the IP address or server host name of the database.
Name	For example, 192.168.100.200
Licor Namo	Specifies the SAP (Service account) username.
User Name	For example, sapuser.
Descured	Specifies the SAP (Service account) password.
Passworu	For example, goerwin@1.
CSV File Upload	Browse the CSV file which contains name of SAP tables to be har-
	vested.
Field Delimiter	Select the required delimiter.
	For example: , [Comma].

Assigning Roles and Users

Users can get the write access to an environment in the following two ways:

- Assign roles to the environment and the users assigned to these roles get write access to the environment
- Assign users directly to an environment

Ensure that you provide necessary permissions to the roles assigned to the users.

Assigning Roles

To assign roles, follow these steps:

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

The available options appear.



3. Click Assign Users or Roles.

The Assign/Unassign Users or Roles page appears. By default, the Roles tab opens.

You can click View to view users assigned to a role.

F	Roles Users			
	Select Role	Role Name	Role Description	Role Users
4		Data Owner_UK	their functional areas for UK. A Data Owner may decide to review and authorize each access request individually or may define a set of rules that determine who is eligible for access based on business function, support role, etc.	View
5		Data Steward_GER	This role is responsible for utilizing Germany'sÅ dataÅ governance processes to ensure fitness ofÅ dataÅ elements - both the content and metadata.	View
6		Data Steward_Hung	This role is responsible for utilizing Hungary's data governance processes to ensure fitness of data elements - both the content and metadata.	View
,		Data Steward_RO	This role is responsible for utilizing Romania'sÅ dataÅ governance processes to ensure fitness ofÅ dataÅ elements - both the content and metadata.	View
1		Data Steward_UK	This role is responsible for utilizing UK'sÅ dataÅ governance processes to ensure fitness ofÅ dataÅ elements - both the content and metadata.	View
9		ETL Developer	Create, edit or delete any mapping defined in a project to which he is assigned (Role is currently identical to Mapping Designer role). This role is	View

4. Select the required roles.

5. Click 💾.

The selected roles are assigned to the environment.

Assigning Users

To assign users, on the Assign/Unassign Users or Roles page, click the Users tab.

Ass	sign/Unassign Us	ers or Roles		-	□ × □
•	Roles User	s			•
					ወ
#	Select User	User ID	User Full Name	Assigned Roles	
1		jadams	Joey Adams	Tech Data Steward_GER	•
2		John Doe	John Doe	Old_DataSteward	
3		mjones	Mike Jones	Data Owner_UK	

Select the required users and click 💾.

The users are assigned to the environment.

Managing Environments

Managing Environments involves:

- Editing or deleting environments
- Importing metadata from different environments

Editing and Deleting Environments

To edit or delete environments, follow these steps:

1. In the **System Catalogue** pane, right-click an environment.

The options available appear.

	D	ATA INTELLIGENCE SUITE	🙀 Scan Metadata				<u>^</u>
			Schedule Metadata Scan				-
Sv	ster	n Catalogue	📊 Validate Data	•			
, ,	5101	n outurogue	Import Environment				
	8	Sensitive Data	Export Environment		0	12	0/12
		Metadata	Time Version		With Expanded	Total Columns	Columns With Expo
		Meladala	Add Table				
	►	🖵 erwin DI Suite	Data Dictionary	•	onment Details	Extended Properties	Data Lineage
	►	🖵 erwin DM	🗾 Data Option	•			
			💽 View Options	,		Column Namo	Logics
			Edit Environment		le	Column Name	Colum
		🖵 Informatica	Clone Environment				Name
6		Informatica (v1.00)	Delete Environment				
			Generate DDL				
		WIG EXCEN	E New Document		M CUSTCARD.	<u>COD ACCT NO</u>	

2. Use the following options:

Edit Environment

Use this option to update the environment details. **Note**: The status of an environment is displayed according to the workflow assigned to the environment. For more information on assigning workflow to environments, refer to the Managing Metadata Manager Workflows section.

Delete Environment

Use this option to delete the environment.

Importing Metadata from an Environment

To import metadata from an environment, follow these steps:

1. In the **System Catalogue** pane, right-click an environment.



2. Click Import Environment.

The Import Environment page appears.



- 3. Drag and drop or use ≐ to browse the exported AMP file.
- 4. Click 🛍.

🧱 Import Environment	_ □ ×
	⇒ ×
Database Schema(s)	MetaData Content >
✓ ☑ ∰ Select All ☑ ∰ dbo	Import Metadata Options: Add New Update Existing + Add New Update Existing + Add New + Invalidate Delete & Reload Import Comments Table(s) View(s) Synonym(s)
Version Environment	

5. Select Schemas and appropriate import metadada options.

Note: Select the **Version Environment** check box to create a version of the environment.

- 6. Click **>**.
- 7. Select the tables and click

The environment is imported.

Updating Sensitivity

Marking your technical and business assets as sensitive is an important aspect of metadata management. It is possible to update sensitivity of technical and business assets in bulk.

You can select multiple columns or tables in the Data Dictionary grid and update their sensitivity. For more information on updating sensitivity in bulk at column or table level, refer to the <u>Data Dictionary</u> topic.

Sometimes a column and its associated assets are required to be marked sensitive. You can update sensitivity of the column and its associated assets in a mind map. For more information on updating sensitivity of assets in a mind map, refer to the <u>Mind Map</u> topic.

You can also update sensitivity of columns in a lineage report. For more information on updating sensitivity of columns in a lineage report, refer to the <u>Lineage</u> topic.

Data Dictionary

You can update the sensitivity of tables and columns in an environment in bulk. You can also update the sensitivity of the system and environment containing these tables and columns. Updating sensitivity involves marking, tables and columns as sensitive with an appropriate sensitive data indicator (SDI) classification.

You can configure email notifications to be sent whenever sensitivity is updated in bulk. For more information on configuring email notifications, refer to the <u>Configuring Sensitivity</u> <u>Update Notifications</u> topic.

Bulk Asset Update

You can update the sensitivity in bulk at table and column level.

Table Level

To update sensitivity of tables in bulk, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- In the System Catalogue pane, click an environment.
 By default, the Data Dictionary tab opens.
- On the Data Dictionary tab, select the required rows.
 You can use the check box at top to select all the rows.
- 4. Hover over **Update Sensitivity**.

•	Data	Dictionary	Environment Details Extended Pro	operties Associations M	ind Map Data Quality	Documents	Impact as Sourc	e Impact as Target
#		Options	Table Name	Column Name	Sensitive Data Ser Indicator (Y/N) Ind Cla	ensitive Data dicator (SDI) assification	Sensitive Dat Indicator (SD Description	Update Sensitivity Selected Table(s) Selected Column(s)
1		₽ <	dbo.ADS ASSOCIATIONS	ID	a			bigint Hars
2		• <	dbo.ADS ASSOCIATIONS	SOURCE OBJECT ID	a			bigint
3		₽ <	dbo.ADS ASSOCIATIONS	SOURCE OBJECT TYP	a			bigint

5. Click Selected Table(s).

The Update Sensitivity For Table(s) page appears.

Update Senstivity For Table(s)			_ 🗆 ×
		Update	Cancel
Sensitive Data Indicator (SDI) Flag	YES		
Sensitive Data Indicator (SDI) Classification	select		
Sensitive Data Indicator (SDI) Description			
Update Sensitivity For :			
Column(s)	YES		
Environment	YES		
System	YES		
Metadata Update Options :			
 Unclassified Only 			
All Classified Only			
All Classified And Unclassified			

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

Field Name	Description
Sensitive Data	Specifies whether the selected tables are sensitive.
Indicator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to YES to mark the tables
Flag	as sensitive.
	Specifies the SDI classification of the selected tables.
Sensitive Data	For example, PHI.
Indicator (SDI)	This list is enabled when Sensitive Data Indicator (SDI) Flag is
Classification	switched to YES. For more information on configuring SDI clas-
	sifications, refer to the <u>Configuring Sensitivity Classifications</u> topic.
Consitivo Doto	Specifies the description of the SDI classification.
Indicator (SDI)	For example: Protected Health Information.
Description	It is enabled when Sensitive Data Indicator (SDI) Flag is switched to
Description	YES. The field autopopulates based on the SDI classification.
	Specifies whether sensitivity is applicable to:
	Column(s): Switch Column(s) to YES to apply the sensitivity to
Luciata Cara	all the columns in the selected tables.
Update Sens-	Environment: Switch Environment to YES to apply sensitivity to
	the environment containing the tables.
	System: Switch System to Yes to apply sensitivity to the system
	containing the tables.
	Specifies whether sensitivity is applicable to:
	Unclassified only: Click Unclassified Only to apply sensitivity to
	assets that are not marked sensitive.
Metadata	All Classified Only: Click All Classified Only to apply sensitivity
Update	to assets that are marked sensitive.
Options	All Classified And Unclassified: Click All Classified And Unclass
	sified to apply sensitivity to both the types of assets sensitive
	or not sensitive.

7. Click Update.

The sensitivity of the metadata is updated based on the options you selected.

Column Level

To update sensitivity of columns in bulk, follow these steps:

1. On the **Data Dictionary** tab, select the required rows.

You can use the check box at top to select all the rows.

2. Hover over Update Sensitivity.

•	Dat	a Dictionary	Environment Details Extended	Properties Associations	Mind Map Data Quali	ity Documents	Impact as Sourc	e Impact as Target	•
								Update Sensitivity	1
#		Options	Table Name	Column Name	Sensitive Data Indicator (Y/N)	Sensitive Data Indicator (SDI) Classification	Sensitive Da Indicator (SD Description	Selected Table(s) Selected Column(s)	e
									delp
9		₽ <	dbo.ADS_FORM	DESCRIPTION	8			varchar	Self
10		₽ <	dbo.ADS_FORM	BASE FORM ID	a			int	
11		₽ <	dbo.ADS_FORM	SYSTEM_BASED	a			tinyint	
12		• <	dbo.ADS KEY VALUE	<u>KV ID</u>	a			bigint	

3. Click Selected Column(s).

The Update Sensitivity For Column(s) page appears.

Update Senstivity For Column(s)			_ □ ×
		Update	Cancel
Sensitive Data Indicator (SDI) Flag	YES		
Sensitive Data Indicator (SDI) Classification	select		
Sensitive Data Indicator (SDI) Description			
Update Sensitivity For :			
Table(s)	YES		
Environment	YES		
System	VES		
Metadata Update Options :			
 Unclassified Only 			
All Classified Only			
All Classified And Unclassified			

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

Field Name	Description
Sensitive Data	Specifies whether the selected columns are sensitive.
Indicator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to YES to mark the columns
Flag	as sensitive.
	Specifies the SDI classification of the selected columns.
Sensitive Data	For example, PHI.
Indicator (SDI)	This list is enabled when Sensitive Data Indicator (SDI) Flag is
Classification	switched to YES . For more information on configuring SDI clas-
	sifications, refer to the <u>Configuring Sensitivity Classifications</u> topic.
	Specifies the description of the SDI classification.
Sensitive Data	For example: Protected Health Information.
Description	It is enabled when Sensitive Data Indicator (SDI) Flag is switched to
Description	YES. The field autopopulates based on the SDI classification.

Field Name	Description
	Specifies whether sensitivity is applicable to:
Lindate Sens-	 Table(s): Switch Table(s) to YES to apply sensitivity to the tables containing the columns.
itivity For	 Environment: Switch Environment to YES to apply sensitivity to the environment containing the columns.
	 System: Switch System to Yes to apply sensitivity to the system containing the columns.
	Specifies whether sensitivity is applicable to:
Motodata	 Unclassified only: Click Unclassified Only to apply sensitivity to assets that are not marked sensitive.
Update Options	 All Classified Only: Click All Classified Only to apply sensitivity to assets that are marked sensitive.
	 All Classified And Unclassified: Click All Classified And Unclas- sified to apply sensitivity to both the types of assets, sensitive or not sensitive.

5. Click Update.

The sensitivity of the metadata is updated based on the options you selected.

Individual Asset Update

You can view and update the sensitivity of technical assets (systems, environments, tables, and columns) individually.

To view and update the sensitivity of technical assets individually, follow these steps:

Table and Column:

In the Data Dictionary tab, you can click <Column_Name> and <Table_Name> to view and edit the sensitivity of the column and table respectively.

Environment:

Sensitivity of an environment can be viewed under the Environment Details tab. You

Data Dictionary Environment Details E	xtended Properties Associations	Mind Map Data Quality Documents Number of Partitions*	Impact as Source Impact as Target
Database Type*	SqlServer	Minimum Connections Per Partitions*	3
Version	1.00	Maximum Connections Per Partitions*	5
Version Label		Options	elf Help
Sensitive Data Indicator (SDI) Flag	a	Sensitive Data Indicator (SDI) Classification	Confidential
Sensitive Data Indicator (SDI) Description	Sensitive Data that if compromis	ed could negatively affect operations	

can edit an environment, and update its sensitivity under the Miscellaneous tab.

System:

The sensitivity of the system can be viewed under the System Details tab. You can <u>edit</u> <u>a system</u>, and update its sensitivity.

Data Dictionary System D	etails Extended Properties	Associations Mind M	ap System Documents	Configure Extended Properties	Scheduled Jobs
сэр гішногіп туре		ESD	а манаден магне		A
Total DBSize		Tot	I Number Of Tables	0	
Definition Of The Day		Bat	ch Extract Window		
Average User		Ave	rage Concurrent Users		
Sensitive Data Indicator (SDI) Flaa	a	Ser (SD	sitive Data Indicator) Classification	Confidential	
Sensitive Data Indicator (SDI) Description	Sensitive Data that if compre	omised could negatively affe	ct operations		

Lineage

You can update the sensitivity of columns in a lineage report. You can also update the sensitivity of tables, environments, and systems containing these columns.

You can configure email notifications to be sent whenever sensitivity is updated in bulk. For more information on configuring email notifications, refer to the <u>Configuring Sensitivity</u> <u>Update Notifications</u> topic.

To update sensitivity of columns in lineage reports, follow these steps:

1. In the **System Catalogue** pane, click an environment.

By default, the Data Dictionary tab opens.

2. On the **Data Dictionary** tab, click **S** for the required column.

The Lineage Report - Dual Combined View page appears.

Lineage Report - Dual Combined View			
Lineage For: erwin DM → DM Landing → Employee		Logical Name Expanded Logical Nam	e Sensitivity Indicator
Antipation Barrier State	erwin DM → DM Landing	erwin DM → DM	anding
	Employees	Citizens	-
	₽ EmployeeName	CitizenID	A
		CitizenName	
		> P EmployeeID	
		T	V

3. In the lineage report, right-click the column.



4. Use the following options:

Selected Asset Only

Use this option to update sensitivity of the column. You can also update sensitivity of the table, environment, and system containing the column.

All Associated Assets

Use this option to update sensitivity of multiple columns in the lineage report. You can also update sensitivity of the tables, environments, and systems containing these columns.

Refer to the following table for field descriptions when you use above options.

Field Name	Description
Sensitive Data	Specifies whether the selected columns are sensitive.
Indicator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to YES to mark the selected
Flag	assets as sensitive.
	Specifies the SDI classification of the selected columns.
Sensitive Data	For example, PHI.
Indicator (SDI) Classification	This list is enabled when Sensitive Data Indicator (SDI) Flag is switched to YES . For more information on configuring SDI clas-sifications, refer to the <u>Configuring Sensitivity Classifications</u> topic.
Sensitive Data Indicator (SDI) Description	Specifies the description of the SDI classification. For example: Protected Health Information.

Field Name	Description
	It is enabled when Sensitive Data Indicator (SDI) Flag is switched to
	YES. The field autopopulates based on the SDI classification.
	Specifies whether the sensitivity is applicable to:
Lindata Sanc	 System(s): Switch System(s) to Yes to apply sensitivity to all the systems containing the columns.
itivity For	 Environment(s): Switch Environment(s) to YES to apply sens- itivity to all the environments containing the columns.
	 Table(s): Switch Table(s) to YES to apply sensitivity to the tables containing the columns.

5. Click Update.

The sensitivity of the assets is updated based on the options you selected.

To update sensitivity of multiple columns in lineage reports, follow these steps:

- 1. In the lineage report, right-click the column.
- 2. Click All Associated Assets.

The Sensitive Data Classification - Lineage page appears.

	_ # X									
All /	Il Associated Assets									
4 2 Columns Environm			ments	2 Systems		4 Tables	Í			
								Next Cancel		
#	Se	elec System Name	Environment Name	Table Name	Column Name	Sensitive Da Indicator (Y/I	ta Sensitive Data Indicator Classification	Sensitive Data Column Name Expanded Logical Column Comments Column Indicator Description Logical Column Name		
	0									
1		erwinDISPoC	erwinDISDocPoC	dbo.ADS_ASSO		8	Internal Only	Internal Data not meant f		
2		WhatfixUseCase	WhatfixUseCase	dbo.ADS_ASSO	DCIA ID	a	Internal Only	Internal Data not meant f		
3		WhatfixUseCase	WhatfixUseCase	dbo.ADS_FORM	M <u>F_ID</u>	â	Internal Only	Internal Data not meant fi		
4		WhatfixUseCase	WhatfixUseCase	dbo.ADS_MOD	ULE MODULE_ID	â	Internal Only	Internal Data not meant fi		

3. Select the required rows and click Next.

You can filter the rows using the filter box.

The Selected Records page appears. It displays the selected rows for verification. You can clear the check box to remove a row from the selected records.

	_ Sensitive Data Classification - Lineage _ 🖉 X													
Ali	All Associated Assets													
		С	2 olumns	2 Environi	ments	2 Systems		4 Tables						A
Se	electe	ed Rec	ords										Previous	ext Cancel
#		Selec	System Name	Environment Name	Table Name	Column Name	Sensitive Data Indicator (Y/N	a Sensitive Data Indicator Classification	ŝ	Sensitive Data ndicator Description	Logical Column Name	Expanded Logical Name	Column Comments	Column Definition
	1	V	erwinDISPoC	erwinDISDocPoC	dbo.ADS_ASSC	ICIA ID	â	Internal Only	In	iternal Data not meant fi				If Hel
1	2	V	WhatfixUseCase	WhatfixUseCase	dbo.ADS_ASSC	ICIA ID	۵	Internal Only	In	iternal Data not meant fi				S

4. Click Next.

The following page appears.

Sensitive Data Classification - Lineage		-
All Associated Assets		
		Previous Update Ca
Sensitive Data Indicator (SDI)	YES (
Sensitive Data Indicator (SDI) Classification	colorit	
()	>=18001	
Sensitive Data Indicator (SDI) Description		
Asset Update Options :		
 Unclassified Only 		
All Classified Only		
All Classified And Unclassified		
Auto Update Sensitivity For:		
System(s)	YES	
System(s) Environment(s)	τες τες	

- 5. Enter or select appropriate values in the fields. Refer to the table above for field descriptions.
- 6. Click Update.

The sensitivity of the metadata is updated based on the options you selected.

Mind Map

You can update the sensitivity of an asset and its associated technical and business assets through a mind map.

Business assets refer to business terms, business policies, business rules, and other business assets defined in the Business Glossary Manager Settings. Technical assets refer to columns, tables, environments, and systems. A column can be associated with business and technical assets. For more information on associating columns, refer to the <u>Associating Columns</u> topic.

You can configure email notifications to be sent whenever sensitivity is updated in bulk. For more information on configuring email notifications, refer to the <u>Configuring Sensitivity</u> <u>Update Notifications</u> topic.

Selected Asset

You can update sensitivity of an asset individually through a mind map.

To update sensitivity of assets individually through mind maps, follow these steps:

- In the System Catalogue pane, click an environment.
 By default, the Data Dictionary tab opens.
- 2. On the **Data Dictionary** tab, click **P** for the required column.

The Mind Map page appears.

Mind Map	
ID	
	NASDAQ HEALTHCARE - IMP 1

3. On the mind map, right-click the required asset.

The options available for the asset appear.



4. Click Selected Asset Only.

The Sensitive Data Classification - Mind Map page appears.

Note: The Auto Update Sensitivity For field does not appear for business assets.

Sensitive Data Classification - Mind Map	p	_ □ ×
		Update Cancel
Sensitive Data Indicator (SDI)	YES	
Sensitive Data Indicator (SDI) Classification	PHI	
Sensitive Data Indicator (SDI) Description		
Auto Update Sensitivity For:		
System(s)	YES	
Environment(s)	YES	
Table(s)	YES	

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

Field Name	Description						
Sensitive Data	Specifies whether the selected asset is sensitive.						
Indicator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to YES to mark the selected						
Flag	asset as sensitive.						
	Specifies the SDI classification of the selected asset.						
Sensitive Data	For example, PHI.						
Indicator (SDI)	This list is enabled when Sensitive Data Indicator (SDI) Flag is						
Classification	switched to YES . 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 Sensitive Data Indicator (SDI) Flag is switched to						
Description	YES. The field autopopulates based on the SDI classification.						
	Specifies whether sensitivity is applicable to:						
	 System(s): Switch System(s) to Yes to apply sensitivity to all the 						
	systems containing the assets.						
Auto Update	Environment(s): Switch Environment(s) to YES to apply sens-						
Sensitivity FOI	itivity to all the environments containing the assets.						
	 Table(s): Switch Table(s) to YES to apply sensitivity to the tables containing the assets. 						

6. Click Update.

The sensitivity of the asset and metadata is updated based on the options you selected.

Associated Assets

You can update sensitivity of associated assets in bulk through a mind map.

To update sensitivity of associated assets through mind maps, follow these steps:

1. On the mind map, right-click an asset.

The options available for the asset appear.



2. Click any one of the following:

All Associated Business Assets:

Click this option to update sensitivity of associated business assets.

All Associated Technical Assets:

Click this option to update sensitivity of associated technical assets.

All Associated Assets:

Click this option to update sensitivity of associated business and technical assets.

For example, if you click All Associated Business Assets then a list of all associated business assets appear. You can filter the assets by entering text in the filter box.

All Asso	ciated Busin	ess Assets									*
	35 Business Te	erm	7 Business Rule	7 Business	Policy						*
											Next Cancel
#	Select	Object Type	Object Path	Object Name	Sensitive Data Indicator (Y/N)	Sensitive Data Indicator Classification	Sensitive Data Indicator Description	Logical Name	Expanded Logical Name	Business Comments	Business Definition
1		Business Term	Business and Manage	Accessibility	a						lf Hei
2		Business Term	Business and Manage	Accretion	a						S
3		Business Term	Business and Manage	Actuals	a						
4		Business Term	Business and Manage	Amortize	a						
5		Business Term	Business and Manage	Capital	a						

3. Select the required assets and click Next.

The Selected Records page appears. You can verify the selected assets and clear the check box if required.

Selected Re	lected Records Previous Next Cancel											
#	Select	Object Type	Object Path	Object Name	Sensitive Data Indicator (Y/N)	Sensitive Data Indicator Classification		Sensitive Data Indicator Description	Logical Name	Expanded Logical Name	Business Comments	Business Definition
												<u>e</u>
1		Business Term	Business and Manage	e Accessibility	8							If He
2		Business Term	Business and Manage	e Accretion	a							Š
3		Business Term	Business and Manage	e Actuals	۵							

4. Click Next.

The following page appears.

Note: The Auto Update Sensitivity For field does not appear if you are updating sensitivity of associated business assets.

Sensitive Data Classification - Mind Ma	p	_ □ ×
		Update Cancel
Sensitive Data Indicator (SDI)	YES	
Sensitive Data Indicator (SDI) Classification	PHI	
Sensitive Data Indicator (SDI) Description	[
Auto Update Sensitivity For:		
System(s)	YES	
Environment(s)	YES	
Table(s)	YES	

- 5. Enter or select appropriate values in the fields. Refer to the <u>table above</u> for field descriptions.
- 6. Click Update.

The sensitivity of the selected assets and metadata is updated based on the options you selected.

Viewing Sensitive Data Dashboard

Sensitive data dashboard is the primary window to gain insights about distribution of sensitive columns across systems and environments. The dashboard helps to rediscover sensitive columns with their Sensitive Data Indicator (SDI) classifications. It displays sensitive data in several formats including a statistics board, pie chart, bar graph, and summary grid.

To access sensitive data dashboard, follow these steps:

2. In the System Catalogue pane, click Sensitive Data.

1. Go to Application Menu > Data Catalog > Metadata Manager.



The sensitive data dashboard appears.

UI Section	on Function						
1-Statistics	It displays total number of tables, columns, sensitive tables, and sens-						
Board	itive columns.						
2 Die Chart	It displays distribution of sensitive columns based on SDI classifications						
2- <u>Ple Chart</u>	across all the systems.						
3- <u>Bar Graph</u>	It displays number of sensitive columns and their SDI classifications in						

UI Section	Function
	each system.
4- <u>Summary</u> Grid	It displays list of all the sensitive columns with their SDI classifications.

Statistics Board

By default, It shows number of sensitive tables and columns across all the systems. For example, in the following image there is one sensitive table and eight sensitive columns across all the systems.



You can use System Name to view number of sensitive columns and tables in a system. If a system has multiple environments, then use Environment Name to view number of sensitive columns and tables in an environment.

Pie Chart

By default, it displays distribution of sensitive columns based on SDI classifications across all the systems. For example, the following image displays a pie chart, in which three columns are classified as Confidential, two columns as No Classification, one column as PII, and two columns as S2.



You can use System Name to view distribution of sensitive columns based on SDI classifications in a system. If a system has multiple environments, then use Environment Name to view distribution of sensitive columns based on SDI classifications in an environment.

Bar Graph

By default, it displays the number of sensitive columns and their SDI classifications in each system. For example, the following image displays a bar graph where, the number of sensitive columns and their SDI classifications is shown in the two systems, erwin DM and SQL System.



You can use System Name to view distribution of sensitive columns based on SDI classifications by environments in a system. If a system has multiple environments, then you can use Environment Name to view distribution of sensitive columns based on SDI classifications in an environment.

Summary Grid

By default, it displays a list of all the sensitive columns with their SDI classifications across all the systems. You can click the required <System Name>, <Environment Name>, <Table Name>, or <Column Name> in the grid to view their details.

For example, the following image displays all the sensitive columns across all the systems in the grid.

Summo	mmary of Sensitive Columns 🔋 👘									
#	System Name	Environment Name	Table Name	Column Name	SDI Class Name	SDI Class Description				
1	erwin DM	DM Landing	Employees	EmployeeName	S2	sd				
2	erwin DM	DM Landing	Employees	EmployeeID	S2	sd				
3	SQL System	Northwind	dbo.Categories	CategoryID	Confidential	Confidential				
4	SQL System	SQL Env	dbo.DimAccount	<u>Operator</u>	Confidential	Confidential				
		< < R	ecords from 1 to 8 🔹 🔉 👔	Page 1 😱 25 rows p	erpage 🖕					

You can use System Name and Environment Name to filter the sensitive columns in the grid. You can also click the pie chart and bar graph to display relevant sensitive columns in the grid.

Use **System Name** and **Environment Name** to filter the statistics and summary of the sensitive columns.

You can also click on pie chart and bar graph to filter summary of the sensitive columns.

Use the following options to work on the Summary of Sensitive Columns grid.

Filtering Rows

Use this option to filter the required rows by entering the required text in one of the five filters.

Reset (🔳)

Use this option to reset the Summary of Sensitive Columns grid.

Export to excel (

Use this option to download the required summary of the sensitive columns.

Adding Documents

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

To add documents to environments, follow these steps:

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



3. Click New document.

The Environment Documents page appears.

Environment Documents	Lú	
Document Name*		^
Document Owner Document Object	Drag-n-Drop files here or click to select files for upload.	
Document Link		
Description		*
		Ŧ
American Describer of Classe		

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 physical document being attached to the					
Document Name	environment.					
	For example, Source Environment Details.					
Document	Drag and drop document files or use ≐ to select and upload doc-					
Object	ument files.					
Document	Specifies the document owner's name.					
Owner	For example, John Doe.					
	Specifies the URL of the document.					
Document Link	For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-					
	b5YkMBq4ptA7jhg5/view					
	Specifies the description about the document.					
Description	For example: The document has information about the envir-					
	onment details.					
Approval	Specifies whether the document requires approval.					
Required Flag	Select the Approval Required Flag check box to select the doc-					
	ument status.					

Field Name	Description
	Specifies the status of the document.
Document Status	For example, In Progress.
Document Status	This field is available only when the Approval Required Flag check
	box is selected.

5. Click 💾.

The document is saved in the Environment Documents grid.

Statistics						^
0 Total Tables	0 Tables With Expanded Logical Names	0 Total Columns	0/0 Columns With Expanded Logical Names	0/0 Total Primary Key Columns	0/0 Total Foreign Key Columns	DQ Score
ded Properties Dat	ta Lineage Impact as	Source Impact a	as Target Mind M	lap Associations	Workflow Log Docum	Data Quality Configu
Environment Documer	nts					
Document Link	Document Status	Document Owner	r Intended Use Description	Created By	Created Date Modified By	Modified Date Options
https://erwin.com/book	<u>kshelf/10</u> In Progress			Administrator	2020-10-20 16:02:17 Administrator	2020-10-20 16:02:17 📑 🖌 🗶

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

Preview (

Use this option to preview the document for your information.

Edit (🖍)

Use this option to update the document details.

Delete (🗙)

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

You can clone an environment under a system and use the same or different connection parameters in the cloned environment. The cloned environment is saved under the system.

To clone environments, follow these steps:

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

	D	ATA INTELLIGENCE SUITE	E 🙀 Scan Metadata						
			0	Schedule Metadata Scan					-
Sv	ster	m Cataloque		Validate Data	•				
-,		eatalogue		Import Environment					
	8	Sensitive Data	Ð	Export Environment		0	0		0/0
		Metadata	+	New Version		lith Expanded cal Names	Total Colu	mns	Columns With Expan
_		Metadata	Ð	Add Table					Ŭ
		🖵 erwin DI Suite		Data Dictionary	,				
		erwin_Sales (v1.00)	*	Data Option	•	e Impact a	as Source	Impact	as Target I
			e,	View Options	•				
	r		2	Edit Environment					
	►	🖵 erwinDISPoC	-	Clone Environment		ocument Statu	s Docum	nent Owne	r Intended U
þ	►	🖵 Informatica	Ŵ	Delete Environment					
				Generate DDL					

3. Click Clone Environment.

The New Environment Cloning page appears.

New Environment Cloning		
Configuration Details	Miscellaneous	
System Environment Name*	erwin_Sales1	
System Environment Type		
Data Steward	-Select Data Steward-	~
Server Platform	Apply To All Tables & Columns	3
Server OS Version		
File Management Type		
File Location		
Production System Name	Choose Production System	~
Production Environment Name		~
Version	1.00	
Version Label		
DQ Score	Select DQ Score	~
Database Type*	MS Excel File	~

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							
System Envir	Specifies the unique name of the environment.							
onment	For example, EDW-Test.							
Name	For more information on naming conventions, refer to the <u>Best</u>							
	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 <u>Con</u> -							
	figuring Data Stewards topic.							
Server Plat-	Specifies the server platform of the environment.							
form	For example, Windows.							
Server OS	Specifies the OS version of the environment's server.							

Field Name	Description
Version	
File Man-	Specifies the file management system (if the environment is a file-
agement	based source).
Туре	For example, MS Excel.
File Location	Specifies a file path (if the environment is a file-based source).
	For example, C:\Users\Jane Doe\erwin\Mike - Target System
Production	Specifies the system name being associated with the environment as
System Name	the production system.
System Name	For example, Enterprise Data Warehouse.
	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 Con-
	figuring Version Display of the Environments topic.
	Specifies the overall data quality score of the environment.
DO Score	For example, High (7-8).
	For more information on configuring DQ scores, refer to the Con-
	figuring Data Profiling and DQ Scores topic.
	Specifies the database type.
	For example, Sql Server.
Databaso	Select the type of database from where you wish to scan metadata.
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 environment is cloned and the cloned environment is saved under the system.

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

Viewing ER Diagram

You can view Entity Relationship (ER) diagram after scanning or importing metadata in an environment. You can view ER diagrams at environment level and export it in the JPG format.

To view entity relationship diagram, follow these steps:

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

Informatica	Clone Environment	Document Link	Document Status
MS Excel	Delete Environment		
▶ 🖵 New	Cenerate DDL		
	New Document		
Oracle	Co Advanced Business Properties		
 Salesforce 	Hide Environment		
Salesforce (v1.00)	🛠 Run Template		
	m Delete Table(s)		
Salesforce1 (v1.00)	C ER Diagram		
 TechPubs (v1.00) 	Onfigure Expanded Logical Name		
	Ciew Workflow		
	Assign Users or Roles		
Snowflake			

3. Click **ER Diagram**.



You can download the ER diagram. To download the ER diagram, click Export Image.

Viewing Workflow Logs

You can create your own workflow and assign it to a system. A workflow assigned to a system is applicable to all the environments under it. For more information on assigning workflows to environments, refer to the <u>Managing Metadata Manager Workflows</u> section. You can view workflow logs of environments to know the current stage of environments.

To view workflow logs of environments, follow these steps:

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

System Catalogue	\$	Statistics										^
Sensitive Data Metadata Metadata		50 Total Tables	Table: Expa	0 s With Logical nded Names	390 Total Columr	15	Columi Expai	0/390 ns With Logical nded Names	55/390 Total Primary I Columns	(ey		^ •
		e nents Impact	as Source	Impact as Target	Extended Proper	rties	Scheduled	Jobs Config	gure Extended Prop	erlies	Workflow Lo	g 🕨
		# Table Name	Table Type	Logical Table Name	Table Expanded Logical Name	Table Associ	ated Term	Table Workflow Status	Column Name	Data Type	Length	Precision
		1 dbo.ADS_ASS	TABLE					Draft	D	bigint	8	19
		2 dbo.ADS_ASS	TABLE					Draft	SOURCE OBJE	bigint	8	19

3. Click the Workflow Log tab.

The workflow log of the environment appears. You can observe that the current workflow stage of the environment blinks in the diagram.



Use the following options:

User Comments ())

Use this option to view users and the comments entered by the users in each stage.

Expand/Hide Users and Roles

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

Collapse/Expand Roles

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

Collapse/Expand Users

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

Export Image

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

Associating Environments

You can associate environments with business assets, systems, environments, tables, and columns. You can also view mind map and association statistics.

Ensure that:

- Business assets are enabled. You can add new business assets and enable them in Business Glossary Manager Settings.
- Relationship between environment and the asset type is defined. You can define associations and relationships in Business Glossary Manager Settings.

To associate environments with asset types, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, click an environment.
- 3. Click the **Associations** tab.
- 4. Select an asset type from the drop down.

↓ Data Dictionary	Environment Details	Associations	Mind Map
Business Term	× •		
Business Term	m Nam	e De	ecription
Environment	in Num		scription
Table			
	_		

5. Click +.

🗖 Relatio	onship Associations					-	- ×				
						Save Can	cel				
Current C	Context:	Data_Migrati	ion								
Current C	Context Type:	Environment	Invironment								
Relations	hip Name:	is associate	is associated with								
Search (p	l partial matches):										
	Term Name	Description	Definition	Catalog Name	Catalog Hierarchy	Data Steward					
	3rd Party Preference Option Code		Records the option the Customer has chosen not to be offered products from 3rd Party's e.g. selling	Customer Management	Customers Business → Customers Business As Is → Information → Customer Management	janedoe	~				
	44900		Incision and drainage of appendiceal abscess; open	DATA ELEMENTS	NASDAQ HEALTHCARE - IMP 1 → DATA ELEMENTS	N/A					
	44900		Incision and drainage of	DATA ELEMENTS	NASDAQ HEALTHCARE - IMP		~				
1-2	3 4 5 →	Records from 1	to 10 of 766								

- 6. Select Relationship Name, and the asset.
- 7. Click Save.

The asset is added to the environment.

•	Data Dictionary	Environment	t Details Associations	Mind Map Do	ata Quality Docume	ents Impact as So	ource Impact as Target	Extended Properties
Busi	ness Term	•	·					<u> </u>
	Actions	Relationshir Name	Term Name	Description	Definition	Catalog Name	Catalog Hierarchy	Data Steward
	í	is associated with	3rd Party Preference Option Code		Records the option the Customer has chosen not to be offered products from 3rd Party's e.g. selling	Customer Management	Customers Business → Customers Business As Is → Information → Customer Management	janedoe

Use the following options under the Actions column:

Edit Association (🖍)

Use this option to edit the association.

Delete Association ($\mathbf{\overline{D}}$)

Use this option to delete the association.

To view mind map, click the **Mind Map** tab. For more information on working on mind map, refer to the <u>Viewing Mind Maps</u> topic.

Configuring Business Properties

You can configure business properties of all the tables and columns under an environment.

You can also configure business properties at table level and update business properties of a table and business properties of its columns.

Note: You can configure business properties only after importing/scanning metadata into an environment.

To configure business properties at environment level, follow these steps:

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



3. Click Advanced Business Properties.

The Advanced Business Properties page appears.

Advand	ced Business Properties								- 🗆 ×
									×
Select All	System / Environment / Table / Column Name	System Description	Business Purpose	Intended Use	Table Definition	Table Comments	Logical Table Name	Table Class	
									
	✓ ➡Informatica (1.00)								
	▲ 🔂dbo.BD_CM_CUSTCARD_/								
	COD_ACCT_NO								
	FLG_DEFAULT								
	DAT_LINKED								

- 4. Double-click cells to enter business properties of tables and columns.
- 5. Click 💾 to apply changes.
- 6. Click

The business properties of all the tables and columns under the environment are updated.

To configure business properties at table level, follow these steps:

1. Under the **System Catalogue** pane, right-click a table.

	D	ATA INTELLIGENCE SUITE		[Metadata Manager	
Sys	ster	n Catalogue	<	:	Statistics	
A	8	Sensitive Data Metadata			1 Total Tables	Table
	4	 erwin DI Suite erwin_Sales (v1.00) 			Data Dictionary	E
		dbo.RM_RESOURCE_N	Ð	A	dd Column	N
		▶ 📄 erwinHR (v1.00)		D	ata Dictionary	•
2	Þ	🖵 erwin DM	I	С	olumn Ordering	•
		🖵 erwinDISPoC	€.	Vi G	íew Options Senerate DDL	•
	Þ	🖵 erwinHR	Co.	A	dvanced Business Properties	V
	►	🖵 Informatica	ż	E	xecute Connector	-
	Þ	🖵 MS Excel	Î	D Vi	elete Table(s) íew Workflow	M
	►	🖵 New	VD-B			
	Þ	🖵 Oracle			3 □ € < <u>d</u>	bo.RM
	⊧	Salesforce				
	Þ	SAP SAP			4 □ • < <u>d</u>	bo.RM

2. Click Advanced Business Properties.

The Advanced Business Properties page appears.

Advan	ced Business Properties								- 🗆 X
								₽`₽	×
Select All	System / Environment / Table / Column Name	System Description	Business Purpose	Intended Use	Table Definition	Table Comments	Logical Table Name	Table Class	
									^
	▲ Salaritatica (1.00)								
	4 adbo.BD_CM_CUSTCARD_								
	COD_ACCT_NO								
	EFLG_DEFAULT								
	DAT_LINKED								

- 3. Double-click cells to enter table and column properties.
- 4. Click 💾 to apply changes.
- 5. Click 💾.

The business properties of the table and its columns are updated.

Configuring Expanded Logical Name

You can update the expanded logical name for multiple tables/columns by scheduling a configuration job. The job updates the expanded logical name based on the table/column name, associated business term's name, and the associated business term's definition.

Note: You should configure expanded logical name of tables and columns after scanning metadata.

You can run the job at both, system and environment levels:

- **System level**: The expanded logical name is applied to all the tables and columns under the system. This includes all the environments under the system.
- **Environment level**: The expanded logical name is applied to all the tables and columns under the environment.

For example, consider a scenario where you want to schedule a job to configure the expanded logical name of a table, RM_Resource and a column, Resource_ID. The parameters of the job are a business term catalog that has a business term, Resource, its definition, Sales Representative, and a splitter, Underscore (_). Refer to the following table to understand the parameters and their values:

Entity	Value	Comment
Splitter (spe-		
cified while	_(Underscore)	
scheduling		
the job)		
	RM_Resource	Here, the part after the underscore (splitter), Resource,
Tablo Namo		matches the Business Term. Therefore, it will be replaced with
		the business term definition and the part before the under-
		score, RM, will be retained in the expanded logical name.
		Here, the part before the underscore, Resource, matches with
Column	Resource_ID	the Business Term. Therefore, it will be replaced with the busi-
Name		ness term definition and the part after the underscore, ID will
		be retained in the expanded logical name.
Business	Resource	This should match with a part of the table and column names

Entity	Value	Comment
Term		above.
Business Term Defin- ition	Sales Rep- resentative	 In the updated expanded logical name, this will replace the part of the table/column name that matches the business term name. That is: For the table, RM will be retained and Resource will be replaced with Sales Representative.
		 For the column, ID will be retained and Resource will be replaced with Sales Representative.
Expanded Logical Name	<blank></blank>	Expanded logical name is formed from the business term defin- ition and part of table or column names.

After the job runs successfully, the expanded logical name of the table and column is updated as mentioned in the following table:

Entity	Expanded Logical Name	Comment
Table	RM Sales Rep-	Here, RM retained from the table name and Sales Representative is
	resentative	added from business term definition.
Column	Sales Rep-	Here, ID is retained from the column name and Sales Rep-
Column	resentative ID	resentative is added from business term definition.

To configure expanded logical name, follow these steps:

1. In the **System Catalogue** pane, right-click a system or environment.

The available options appear.

F	D.	ATA INTELLIGENO	CE SUITE			Metadat	a Manage	er			
Sy	ster	n Catalogue		<	•	Data Dio	tionary	System	n Details	Extended Propertie	es Data Linea
	8	Sensitive Data		•	Bu	siness Term		•			
		Metadata				Actions	Relat	tionship Name	Terr	m Name	Description
	Þ	🖵 erwin DI Suite	New E	nviro	nment						
	Þ	🖵 erwin DM	E New D	ocur	nent						
	Þ	🖵 erwinDISPoC	📝 Edit Sy	ster	ı						
	Þ	🖵 Informatica	Delete	Sys	em stem In	formation					
þ	►	🖵 MS Excel	Report	- Da	ita Dicti	onary					
	Þ	🖵 New	🕉 Run Te	mpla	ate						
	Þ	🖵 Oracle	Config Config Config	ure E Vorkt	Expande low	ed Logical Na	me				
	Þ	Salesforce									

2. Click Configure Expanded Logical Name.

The Configure Expanded Logical Name page appears.

Configure Expanded Logical Name	_ 🗆 :
	li ×
Catalogs	
Business Terms Catalog_Name (2) Catalog_Name (2) ELN (1) ELN (1) NASDAG HEALTH-CARE - IMP 1 (19) NASDAG HEALTH-CARE - IMP 2 (19) NASDAG OF LAG (3) NSDG OPT 3 (2)	
Splitter (underscore)	
_(ondescore)	•
Job Name*	
Administrator1580049338831	
Interval	
Once	•
Interval Once Schedule Job On* O Local O Server	
Interval Once Schedule Job On* O Local Server D1-24-0000.0005	

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

Field Name	Description					
Catalogs	Select the catalog containing the required business term.					
Splitter	select appropriate splitter based on the table name or column name.					
Job Name	A default job name is autopopulated. You can modify it and enter a job name.					
Interval	Select an interval of the job. Interval sets the frequency of the job. For example: If you set the interval every week then the job will be executed every week.					
Local or Server	 Select the machine whose clock decides the time of the scheduled scan. Local: Refers to your local machine. Server: Refers to the machine where erwinDIS has been deployed. 					
Schedule Job On	Select date and time of the execution of the job.					
Notify Me	Turn the Notify Me to ON to receive a notification email about the sched- uled job.					
Notification Email	This field is autopopulated with your email ID. You receive email noti- fications about the scheduled job from the Admin Email ID, configured in the Email Settings. For more information on configuring Admin Email ID, refer to the <u>Configuring Email Settings</u> topic.					
CC List	Enter a comma-separated list of email IDs that should receive the job notification.					

4. Click 💾.

The job is scheduled and added to the Scheduled Jobs list on the **Scheduled Jobs** tab.

↓ Data I	Dictionary Syste	em Details Assoc	ciations M	ind Map	System Docume	nts Extended	Properties Confi	gure Extended	Properties Sch	eduled Jo	bs 🕨
Schedule	d Jobs										f
ь Туре	Environment Name	Scheduled Objects	Previous Fire Time	Next Fire Time	Job State	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
tadata panded gical me	Erwin_Sales	All Environments		01-27-2020 12:04	NORMAL	Administrator	2020-01-27 12:03:11.498	Administrator	2020-01-27 12:03:11.498	1	Û

You can edit the job using \checkmark or delete it using $\overline{\mathbb{I}}$.

The job is executed at the scheduled time and the expanded logical names of tables and columns are updated.

Columns Table Prope	rties Associations	Mind Map	Data Quality	Documents	Extended Properties	Indexes	Impact Analysis	Forward Lineage
								1
- Technical Properties								
Table Name	dbo.RM_RESOURCE				Environment Name	Integro	tion	
System Name	Erwin_Sales				No of Rows	4		
Synonym Reference	onym Reference				FileType			
					Workflow Status	Draft		
- Business Properties								
Data Steward	janedoe				Logical Table Name	Resour	се	
Table Definition	Tab Def				Expanded Logical Name	e RM Sal	es Representative	
Table Comments	Sales resource 2020				Used In Gap Analysis	\checkmark		
Table Class	Table_Class				Table Alias	SALESR	esource	
DQ Score	Very High (9-10)							

Column Properties	Associations Mind Ma	p Documents	Impact Analysis	Forward Lineage	Reverse Lineage	Extended Properties V	alid Values
Workflow Status	Draft						
– Business Properties –							
Data Steward	janedoe			Logical Column N	ame Res	source ID	
Column Definition	represents resource	ID		Expanded Logica	Name Sale	es Representative ID	
Column Comments	Column ID as per 20)20		Used In Gap Analy	ysis 🗹		
Sensitive Data Indicator (SDI) Flag							
Sensitive Data Indicator (SDI) Classification	Confidential			Sensitive Data Ind (SDI) Description	icator Ser	nsitive Data that if compromised	l c
Column Class	Column_Class			Column Alias	RES	OURCEID	
DQ Score	Very High (9-10)			Business Key Flag	\checkmark		

Note: You can use this job to update the expanded logical name only once. Alternately, you can update expanded logical names under <u>table properties</u> and <u>column</u> <u>properties</u>.

Scanning and Managing Metadata

You can scan source and target metadata from different databases, data models, or flat files etc. Ensure that you create an appropriate environment depending on the database type. For example, if you want to scan metadata from SQL Server, then you should create the SQL Server environment.

The metadata scan adds data dictionary, table properties, and column properties that can be validated and updated. You can enrich your metadata by assigning codesets to columns as valid values. Tables and columns can be associated with business and technical assets and these associations can be viewed on a mind map. You can also assign workflows to tables and columns using the Workflow Manager and view workflow logs.

Scanning and managing metadata involves:

- Scanning metadata from data sources
- Adding tables
- Adding Columns
- Deleting tables and columns
- Scheduling metadata scans
- Updating table properties
- Updating column properties
- Validating data
- Assigning codesets to columns
- Viewing workflow logs of tables
- Viewing workflow logs of columns
- Associating tables
- Associating columns

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	_ _ x
Database Schema(s)	∧ MetaData Content >
▲ 📄 🏭 Select All	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.

Import Metadata Options	Description			
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 **>**.

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.

🔯 SqlServer Metadata Scan - Step2		_ 🗆 ×
	←	
A_Environment		^
A D D dbo		
Tables (175)		
▶ □ □ □ □ □ □ □ □ □ □		
▶ [51 - 100]		
▶ [] [101 - 150]		
▶ □ □ □ □ □ □ □ 1 1 □ 1 1 1 1 1 1 1 1 1 1		
Views (31)		
ACTIVE_SYS_CON_ENVIRONMENTS		
ADS_WORKFLOW_ASSIGNMENT_V		
ADS_WORKFLOW_NODE_ROLE_V		
ADS_WORKFLOW_NODE_V		
ADS_WORKFLOW_STATUS_V		
APPENDED_MAP_SPEC_RCRDS_V		
MPACT_ANALYSIS_DETAILS_V		
MPACT_ANALYSIS_SUMMARY_V		
		•

7. Select the required objects.

8. Click 💾.

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

You can also import metadata from:

- MS Excel File
- JSON
- CSV (Flat File)
- XMI

- MS Access File
- XSD

MS Excel

You can import metadata from MS Excel files into an MS Excel environment.

To import metadata from MS Excel files, follow these steps:

	DATA INTELLIGENCE SUITE	🙀 Scan Metadata	
		Schedule Metadata Scan	
Svs	stem Catalogue	📊 Validate Data	•
-,-	Com Catalogue	Import Environment	
	🔒 Sensitive Data	Export Environment	
	■■ Metadata	1 New Version	Т
_		Add Table	
	 Perwin DI Suite 	Data Dictionary	•
	erwin_Sales (v1.00)	🛃 Data Option	• =
	erwinHR (v1 00)	💽 View Options	•
		Edit Environment	ble
	▶ 🖵 erwin DM	Clone Environment	
	🖵 erwinDISPoC	m Delete Environment	
		Renerate DDL	
		New Document	o F
	Informatica	Co Advanced Business Properties	0.1
	MS Excel	Hide Environment	
		🛠 Execute Connector	<u>o.</u> F
		Delete Table(s)	
	Oracle	🚠 ER Diagram	
	Salesforce	Onfigure Expanded Logical Name	<u>o.</u> F
	SAP	Ciew Workflow	
		S Assign Users or Roles	
	Snowflake		0.r

1. In the **System Catalogue** pane, right-click an MS Excel environment.

2. Click Scan Metadata.

The Excel Metadata Scan - Step1 page appears.



- 3. Drag and drop or use \triangleq to browse and select the MS Excel file.
- 4. Use the following options to import metadata.

Default Template Import

Use this option to import metadata from the standard Excel template. To download the standard excel template, click .

Enable header selection

Use this option to allow header selection for the Excel file. Click **Enable header** selection and click .

The Excel Metadata Scan - Step2 page appears.

	🛃 Excel Metadata Scan - Step2 📃 🗆						_ = ×	
								←→×
M	etaData Content							
Exe	Excel Metadata Preview Screen Please use first row (double click on NOT IN USE Cell) to set each column's identity!							
	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE
1	TABLE_NAME	TABLE_DEF	TABLE_COMMENTS	LOGICAL_TABLE_NAM	COLUMN_NAME	COL_DEF	COLUMN_COMMENTS	LOGICAL_COLUMN
2	dbo.RM_RESOURCE_N				RESOURCEID_New			
3	dbo.RM_RESOURCE_N				RESOURCENAME_Nev			
4	dbo.RM_RESOURCE_N				RESOURCEDESC_New			
5	dbo.RM_RESOURCE_N				RESOURCECELLPHONE			
6	dbo.RM_RESOURCE_N				RESOURCEHOMEPHO			
7	dbo.RM_RESOURCE_N				RESOURCEEMAIL_New			

To select headers, on the Excel Metadata Scan - Step2 page, double-click the NOT IN USE cell.

Skip & Assume first row as header

You can use this option only when you click Enable header selection. Use this option to select the first row in the Excel file as headers.

Select the **Skip & Assume first row as header** check box and click **D**. The Excel Metadata Scan - Step2 page appears. The first row in the Excel file appears as headers.

•	Excel Metadata Scan - Step2 _ D						_ 🗆 🗙	
								←→×
N	MetaData Content							
E	xcel Metadata Preview Screen Please use first row (double click on NOT IN USE Cell) to set each column's identity!							
	Table Name	Table Definition	Table Comments	Logical Table Name	Column Name	Column Definition	Column Comments	Logical Column Nar
1	dbo.RM_RESOURCE_1				RESOURCEID_New			
2	dbo.RM_RESOURCE_1	×			RESOURCENAME_Nev			
3	dbo.RM_RESOURCE_1				RESOURCEDESC_New			
4	dbo.RM_RESOURCE_1				RESOURCECELLPHON			
5	dbo.RM_RESOURCE_1				RESOURCEHOMEPHO			
6	dbo.RM_RESOURCE_N				RESOURCEEMAIL_New			

To select alternate headers, double-click the header cell.

Advance Template Import

Use this option to import metadata from an advanced template. You can use the following import options with the advance template:

Import Extended Properties:

Use this option to import the extended properties into tables and columns.

Import Valid Values:

Use this option to import valid values into columns. **Import Indexes**:

Use this option to import the indexes into columns.

5. Use the following update options.

Add New

Use this option to insert new metadata.

Update Existing + Add New

Use this option to update the existing metadata based on tables and columns in the Excel file.

Update Existing + Add New + Invalidate

Use this option to update the existing metadata without deleting it.

Delete & Reload

Use this option to delete all the business properties and data dictionary stored as metadata for this environment.

6. Click **>**.

The Excel Metadata Scan - Step2 page appears.



7. Select the required schema and tables.

8. Click 💾.

The metadata is imported and saved in the environment.

JSON

You can import metadata from JSON files into a JSON environment.

To import metadata from JSON files, follow these steps:



1. In the System Catalogue pane, right-click a JSON environment.

2. Click Scan Metadata.

The JSON Metadata Scan - Step1 page appears.

JSON Schema : *	Drag-n-Drop files here or click to select files for upload.	
Data File (JSON) :	Drag-n-Drop files here or click to select files for upload.	
Scan Options Add New Update Existing Update Existing Delete & Reloc Note: Checking this	i + Add New + Add New + Invalidate d s will Delete All Business Properties and Data Dictionary values stored as metadata for this Envi	ronment
Import Model Type		

- 3. Under the **JSON Schema** section, drag and drop or use $\stackrel{\frown}{=}$ to browse and select the JSON schema file.
- 4. Under the **Data File [JSON]** section, drag and drop or use $\stackrel{\frown}{=}$ to browse and select the JSON data file.
- 5. Use the following scan options:

Add New

Use this option to insert new metadata into the environment.

Update Existing + Add New

Use this option to update the existing metadata based on tables and columns in the JSON file.

Update Existing + Add New + Invalidate

Use this option to update the existing metadata without deleting it.

Delete & Reload

Use this option to delete all the business properties and data dictionary stored as metadata for this environment.

- 6. Click the appropriate Import Model Type.
- 7. Click 🔁.
The JSON Metadata Scan - Step2 page appears.

👼 JSON Metadata Scan - Step2	_ ¤ ×
<u>ç</u>	< ≝ ≥
🔺 📃 🛐 Data_Integration	
odb 📑 🗌 4	
🕨 🔄 🗐 Sales	
🕨 🔲 🗐 Person	
Production	
HumanResources	
🕨 🔲 🗐 Purchasing	

8. Select the required schema and tables.

9. Click 💾.

The metadata is imported and saved in the environment.

CSV

You can import metadata from CSV files into a CSV environment.

To import metadata from CSV files, follow these steps:

	DATA INTELLIGENCE SUITE	Scan Metadata	
		Schedule Metadata Scan	
Sys	stem Catalogue	Validate Data	•
		Import Environment	
	🔒 Sensitive Data	Export Environment	
	Metadata	to New Version	Т
	-	Add Table	
	erwin DI Suite	III Data Dictionary	•
	erwin_Sales (v1.00)	🛃 Data Option	• =
		View Options	•
		Edit Environment	ble
	🕨 🖵 erwin DM	Clone Environment	
	🖵 erwinDISPoC	Delete Environment	
	▶ □ erwinHR	🖣 Generate DDL	
		Rew Document	O F
	Informatica	Co Advanced Business Properties	0.1
	MS Excel	Hide Environment	
	New	3 Execute Connector	<u>o.</u> F
		Delete Table(s)	
	Oracle	🕂 ER Diagram	
	Salesforce	Onfigure Expanded Logical Name	<u>o.</u> F
	SAP	Ciew Workflow	-
		S Assign Users or Roles	
	Snowflake		0.F

1. In the **System Catalogue** pane, right-click a CSV environment.

2. Click Scan Metadata.

The CSV Metadata Scan - Step1 page appears.

对 CSV Metadata	ı Scan - Step1	_ 🗆 ×
		→×
MetaData Conte	nt	
Delimiter File :	Drag-n-Drop files here or click to select files for upload.	
File Path(s):		
Scan Opt Add Ne Update Update Delete Note: Chec	ions W Existing + Add New Existing + Add New + Invalidate & Reload :king this will Delete All Business Properties and Data Dictionary values stored as metadata for this Enviro	nment

- 3. Drag and drop or use 😑 to browse and select the delimiter file.
- 4. In the File Path(s) box, enter the file path.
- 5. Use the following scan options:

Add New

Use this option to insert new metadata into the environment.

Update Existing + Add New

Use this option to update the existing metadata based on table and columns in the CSV file.

Update Existing + Add New + Invalidate

Use this option to update the existing metadata without deleting it.

Delete & Reload

Use this option to delete all the business properties and data dictionary stored as metadata for this environment.

6. Click **>**.

The CSV Metadata Scan - Step2 page appears.



7. Select the required tables.

8. Click 💾.

The metadata is imported and saved in the environment.

XMI

You can import metadata from XMI files into a XMI environment.

To import metadata from XMI files, follow these steps:

1. In the System Catalogue pane, right-click a XMI environment.



2. Click Scan Metadata.

The XMI Metadata Scan - Step1 page appears.

XMI Metadata Scan - Step1	⊐ ×
€ 8	3
etaData Content	
Al File : * Drag-n-Drop files here or click to select files for upload.	
Scan Options	-
 Add New 	
Update Existing + Add New	
Update Existing + Add New + Invalidate	
O Delete & Reload	
Note: Checking this will Delete All Business Properties and Data Dictionary values stored as metadata for this Environment	

- 3. Drag and drop or use 😑 to browse and select the XMI file.
- 4. Use the following scan options:

Add New

Use this option to insert new metadata into the environment.

Update Existing + Add New

Use this option to update the existing metadata based on tables and columns in the XMI file.

Update Existing + Add New + Invalidate

Use this option to update the existing metadata without deleting it.

Delete & Reload

Use this option to delete all the business properties and data dictionary stored as metadata for this environment.

5. Click

The XMI Metadata Scan - Step2 page appears.



6. Select the required tables.

7. Click

The metadata is imported and saved in the environment.

MS Access File

You can import metadata from MS Access files into a MS Access environment.

To import metadata from MS Access files, follow these steps:

1. In the System Catalogue pane, right-click a MS Access environment.

	DATA INTELLIGENCE SUITE	🕞 Scan Metadata
		🕔 Schedule Metadata Scan
Sve	tem Catalogue	📊 Validate Data 🔹 🖡
Uy 3		Import Environment
	🔒 Sensitive Data	Export Environment
	Metadata	New Version
		Add Table
	Image: Provide the matrix of the second s	Data Dictionary
	erwin DM	🛃 Data Option 🔹 🖡
	•	🕘 View Options
	 Perwin_MS Access Con 	Z Edit Environment
	MS Access Con 1 (v1.00)	Clone Environment
	erwinHR	Delete Environment
	•	Senerate DDL
]	Informatica	Rew Document
	MS Excel	Ca Advanced Business Properties
		Hide Environment
	▶ L New	🛠 Execute Connector
	 	Delete Table(s)
	Salesforce	ER Diagram
	-	Onfigure Expanded Logical Name
	▶ Lu SAP	Rev Workflow
	Snowflake	Assign Users or Roles

2. Click Scan Metadata.

The MS Access Metadata Scan - Step1 page appears.

MS Access Metadata Scan - Step1 –	n ×
E) (×
MetaData Content	
Drag-n-Drop files here or click to select files for upload.	
- Scan Options	
Add New	
Update Existing + Add New	
Update Existing + Add New + Invalidate	
O Delete & Reload	
Note: Checking this will Delete All Business Properties and Data Dictionary values stored as metadata for this Environment	

- 3. Drag and drop or use 😑 to browse and select the MS Access file.
- 4. Use the following scan options:

Add New

Use this option to insert new metadata into the environment.

Update Existing + Add New

Use this option to update the existing metadata based on tables and columns in the MS Access file.

Update Existing + Add New + Invalidate

Use this option to update the existing metadata without deleting it.

Delete & Reload

Use this option to delete all the business properties and data dictionary stored as metadata for this environment.

5. Click \rightarrow .

The MS Access Metadata Scan - Step2 page appears.



6. Select the required tables.

7. Click 💾.

The metadata is imported and saved in the environment.

XSD

You can import metadata from XSD files into XSD environments.

To import metadata from XSD files, follow these steps:

	DATA INTELLIGENCE SUITE	Scan Metadata	
Sys	stem Catalogue		,
		Import Environment	
	🔒 Sensitive Data	Export Environment	
	Metadata	Mew Version	Т
		Add Table	
	erwin DI Suite	III Data Dictionary	•
	erwin_Sales (v1.00)	🛃 Data Option	• -
		View Options	•
		Edit Environment	ble
	▶ 🖵 erwin DM	Clone Environment	
	🖵 erwinDISPoC	Delete Environment	
	erwinHR	Renerate DDL	
		Rew Document	O F
	Informatica	Co Advanced Business Properties	0.1
	MS Excel	Hide Environment	
	New	3 Execute Connector	<u>o.</u> F
		Delete Table(s)	
	Qracle	🕂 ER Diagram	
	Salesforce	Onfigure Expanded Logical Name	<u>o.</u> F
		Ciew Workflow	
		Assign Users or Roles	
	Snowflake		0.F

1. In the **System Catalogue** pane, right-click a XSD environment.

2. Click Scan Metadata.

The XSD Metadata Scan - Step1 page appears.

XSD Metadata Scan - St	ep1	_ 0
Metadata File (XSD) : *	Drag-n-Drop files here or click to select files for upload.	
Data File (XML) :	Drag-n-Drop files here or click to select files for upload.	
Scan Options Add New Update Existing Update Existing Delete & Reload Note: Checking this	+ Add New + Add New + Invalidate will Delete All Business Properties and Data D	Dictionary values stored as metadata for this Environment

- 3. Under the **Metadata File [XSD]** section, use to browse or drag and drop the metadata file with .xsd extension.
- 4. Under the **Data File [XML]** section, use \triangleq to browse or drag and drop the data file with .xml extension.
- 5. Use the following scan options:

Add New

Use this option to insert new metadata into the environment.

Update Existing + Add New

Use this option to update the existing metadata based on tables and columns in the XSD file.

Update Existing + Add New + Invalidate

Use this option to update the existing metadata without deleting it.

Delete & Reload

Use this option to delete all the business properties and data dictionary stored as metadata for this environment.

6. Click **D**.

The XSD Metadata Scan - Step2 page appears.



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

The metadata is imported and saved in the environment.

Adding Tables

You can add tables in an environment manually and define their technical and business properties. You can also use User-Defined Fields to define additional properties of a table. UI labels of the User-Defined fields can be configured in Language Settings.

To add tables, follow these steps:

1. Go to Application Menu > Data Catalog > Metadata Manager.





3. Click Add Table.

The Add New Table page appears.

Add New Table			_ 🗆 X
Table Details			•
			X
Table Name *			
Table Name		Environment Name Integration	
System Name	Erwin_Sales	No of Rows	
Synonym Reference		FileType	
– Business Properties —— Data Steward	-Select Data Steward-	Logical Table Name	=
Table Definition		Expanded Logical Name	
Table Comments		Table Alias	
Table Class	Select 🔻	Used in Gap Analysis	
DQ Score	Select 🔻		
User Defined Fields			
User Defined-1		User Defined-6	
ъ 🗛 н в	/π = = = = = = = = = = = = = = = = = = =	╘┹ ⋗Анклинттена	,

4. Enter or select appropriate values in the fields. Refer to the following table for field description.

Field Name	Sub-Field	Description
Technical Properties	Table Name	Specifies the physical name of the table. For example, Account or Currency.
	System Name	Specifies the physical name of the system under which the table exists. For example, Enterprise Data Warehouse. You cannot edit this field.
	Synonym Reference	Specifies the synonym reference of the table. For example, Sales_Rep_Information. This field is autopopulated during the metadadata scan. You cannot enter it manually.
	Environment Name	Specifies the physical name of the environment under which the table exists. For example, EDW-Test.

Field Name	Sub-Field	Description
		You cannot edit this field.
		Specifies the total number of rows in the table.
	NO OI ROWS	For example, 100.
		Specifies the workflow status of the table.
		For example, draft.
		By default, Metadata_Manager_Default_Workflow_1 is
	Workflow	assigned to all the tables in the Metadata Manager. You can
	Status	create and re-assign a workflow to all the tables in an envir-
		onment.
		For more information on workflow status, refer to the
		Assigning Workflows to Tables topic.
		Specifies the name of the data steward responsible for the
	Data Ste- ward	table.
		For example, Jane Doe.
Business		For more information on configuring list of data stewards,
Properties		refer to the <u>Configuring Data Stewards</u> topic.
	Table Defin- ition	Specifies the definition of the table.
		For example: The table contains five columns with emp ID
		column as the primary key.
	Table Com-	Specifies comments about the table.
	ments	For example: The table contains details of the employees.
	Table Class	Specifies the table class property.
		For more information on configuring table class, refer to <u>Con</u>
		figuring Table and Column Class topic.
		Specifies the overall data quality score of the table.
	DQ Score	For example, High (7-8).
		For more information on configuring DQ scores, refer to the
		Configuring Data Profiling and DQ Scores topic.
	Logical Table	Specifies the logical name of the table.

Field Name	Sub-Field	Description
	Name	For example, if the physical name of a table is DIM_Cus- tomer, then the logical name of the table is Customer Dimen- sion.
		Specifies the expanded logical name of the table.
	Expanded Logical Name	For example, if the physical name of a table is RM_Resource, then the expanded logical name of the table is RM Sales Rep- resentative.
		You can configure expanded logical name of tables in bulk at <u>system</u> and <u>environment</u> level.
	Licod in Con	Specifies whether the table is being used as part of a gap analysis to check table usage in mappings.
	Analysis	Select the check box if the table is used in gap analysis.
	Analysis	For more information on performing table gap analysis, refer to the <u>Performing Table Gap Analysis</u> topic.
	Sensitive	Specifies whether the table is sensitive.
	Data Indic- ator (SDI) Flag	Switch Sensitive Data Indicator (SDI) Flag to 🔒 to mark the table sensitive.
		Specifies the SDI classification of the table.
	Sensitive	For example, PHI.
	Data Indic-	This list is enabled when Sensitive Data Indicator (SDI) Flag
	ator (SDI) Classification	is switched to . For more information on configuring SDI classifications, refer to the <u>Configuring Sensitive Data Indic</u> -
		ator Classifications topic.
Soncit	Sonsitivo	Specifies the description of the SDI classification.
	Data Indic- ator (SDI) Description	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.

Field Name	Sub-Field	Description
	Table Alias	Specifies the alias name of the table.
		For example, Sales_Representative_Table.

5. Click 💾.

The table is added to the environment.

Adding Columns

You can add columns in a table manually and enter technical and business properties of a column. You can also use user defined fields to enter additional properties of the column. UI labels of user defined fields can be configured in <u>Language Settings</u>.

To add columns in tables manually, follow these steps:

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

The available options appear.



3. Click Add Column.

The Add New Column page appears.

Add New Column					_ 0
Column Details					
To obside I Dress ortics				Ľ ×	
rechnical Propenies					
Column Name *			Data Type		
Data Domain			Storage Type		
Precision			Length		
DB Default Value			Scale		
Nullable Flag			Identity Flag		- 1
Natural Key Flag			Percent Null Value		
Foreign Key Flag			Primary Key Flag		
Foreian Key Column Name			Foreign Key Table Name		
Minimum Value			ETL Default Value		
File Starting Position			Maximum Value		
Business Properties					
Data Steward	-Select Data Steward-	~	Logical Column Name		
Column Definition			Expanded Logical Name		

4. Enter or select appropriate values in the fields. Refer to the following table for field description.

Field Name	Sub-Field	Description					
	Column	Specifies the physical name of the column.					
	Name	For example, Object_ID.					
	Data Domain	Specifies the data domain values for the column.					
		For example, data domain of a Gender column is M and F.					
		Specifies the precision of the column.					
Tachnical	Precision	For example: 5, the number 123.45 has a precision of 5 and					
Properties		a scale of 2.					
Toperties	DB Default	Specifies the default value of the column in the database.					
	Value	For example, True.					
		Specifies whether the column allows null values.					
	Nullable Flag	Select the check box if the column allows null values.					
	Natural Key	Specifies whether the column is a natural key.					
	Flag	Select the check box if the column is a natural key.					

Field Name	Sub-Field	Description
	Foreign Key	Specifies whether the column is a foreign key.
	Flag	Select the check box if the column is a foreign key.
	Foreign Key	Specifies the actual column name where the column is listed
	Column	as a PK (in case the current column being an FK).
	Name	For example, ID.
	Minimum	Specifies the minimum value of the column.
	Value	For example, minimum value of ID column can be 424.
	File Starting Position	Specifies the starting position in the file.
		Specifies the workflow status of the column.
		For example, draft.
	Workflow Status	By default, Metadata_Manager_Default_Workflow is assigned to all the columns in the Metadata Manager. You can create and re-assign a workflow to all the columns in a table. For more information on the workflow status, refer to
		the Assigning Workflows to the Columns topic.
		Specifies the physical data type of the column.
	Data Type	For example, varchar.
		Specifies the storage type of the column.
	Storage Type	For example, row store/column store in the case of SAP systems.
		Specifies the physical length of the column.
	Length	For example, if the column datatype is char(5), then its phys- ical length is 5.
		Specifies the physical scale of the column.
	Scale	For example: The number 123.45 has a precision of 5 and a scale of 2.
	lala atta - Ela	Specifies whether the column is used as an identity flag.
	Identity Flag	Select the check box if the column is used as an identity flag.

Field Name	Sub-Field	Description					
	Percent Null	Specifies the percentage of null values in the column.					
	Value	For example, 10%.					
	Drimory Koy	Specifies whether the column is a primary key.					
	Flag	Select the check box if the column is used as the primary key.					
	Foreign Key	Specifies the actual table name where the column is listed as					
	Table Name	a PK (in case of the current column being an FK).					
	ETL Default	Specifies the default ETL value of the column during the load					
	Value	process.					
	Maximum	Specifies the maximum value of the column.					
	Value	For example, maximum value of ID column can be 1503.					
		Specifies the data steward responsible for the column.					
	Data Ste- ward	For example, Jane Doe.					
		For more information on configuring list of data stewards,					
		refer to the <u>Configuring Data Stewards</u> topic.					
	Column Definition	Specifies the definition of the column.					
		For example: The column is a primary key that allows 5					
		alpha-numeric characters.					
	Column Com- ments	Specifies the comments about the column.					
Business		For example: The column provides unique identification of					
Properties		employee in the employee table.					
	Sensitive Data Indic-	Specifies whether the column is sensitive.					
	ator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to 📫 to mark the					
	Flag	column sensitive.					
	Sensitive	Specifies the SDI classification of the column.					
	Data Indic-	For example, PHI.					
	ator (SDI)	This list is enabled when Sensitive Data Indicator (SDI) Flag					
	Classification	is switched to 🔒. For more information on configuring SDI					

Field Name	Sub-Field	Description
		classifications, refer to the Configuring Sensitive Data Indic-
		ator Classifications topic.
		Specifies the description of the SDI classification.
	Sensitive	For example: Protected Health Information.
	ator (SDI)	It is enabled when Sensitive Data Indicator (SDI) Flag is
	Description	switched to 🔒. The field autopopulates based on the SDI classification.
		Specifies the column class property.
	Column Class	Select a column class. For more information on configuring column class, refer to the <u>Configuring Table and Column</u> <u>Class</u> topic.
		Specifies the overall data quality score of the column.
	DO Scoro	For example, High (7-8).
		For more information on configuring DQ scores, refer to the Configuring Data Profiling and DQ Scores topic.
		Specifies the logical name of the column.
	Logical Column Name	For example, if the physical name of the table is CUST_ID_ NUM, then the logical name of the table is Customer Iden- tification Number.
		Specifies the expanded logical name of the column.
	Expanded	For example, if the physical name of the column is Resource_ID, then the logical name of the .
		You can also configure expanded logical name of columns in bulk at <u>system</u> and <u>environment</u> level.
	Llood in Corr	Specifies whether the column is being used in a gap analysis for usage in mappings.
	usea in Gap Analysis	Select the check box if the column is used in the gap ana- lysis.
		For more information on performing column gap analysis,

Field Name	Sub-Field	Description
		refer to the <u>Performing Column Gap Analysis</u> topic.
	Column Alias	Specifies the alias name of the column.
	Column Allas	For example, Resource_ID.
	Business Key	Specifies whether the column is a business key.
	Flag	Select the check box if the column is a business key.

5. Click 💾.

The column is added to the table.

Deleting Tables and Columns

You can delete tables and columns that are not required.

Tables

To delete tables from environments, follow these steps:

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

The available options appear.



3. Click **Delete Table(s)**.

The Delete Tables page appears.



- 4. Select the required tables.
- 5. Click 🛗.

The selected tables are deleted from the environment.

Columns

To delete columns from tables, follow these steps:

1. In the System Catalogue, right-click a column.

The available options appear.



2. Click Delete Column(s).

The column is deleted.

Scheduling Metadata Scans

You can schedule a metadata scan for an environment whose schema was selected or it was scanned at least once.

To schedule a metadata scan, follow these steps:

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



3. Click Schedule Metadata Scan.

The Job Scheduler page appears.

Iob Scheduler		_ 🗆 X
	Schedule	Cancel
Job Name* :	Administrator157189	7953959
Interval :	Once	-
Schedule Job On* :	10-24-2019 11:49	
 Import Metadata Add New Update Existing + Delete & Reload Import Comments Table(s) View(s) Synonym(s) Version 	O Local O Serve Options Add New	r
Notify Me : Notification Email : CC List :	ON O	
Note* : Please provide	e CC List with comma	(,) separated values

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
Job Name	Specifies the job name.
	For example, Administrator1585030550001.
	This field autopopulates with a job name. You can edit it and enter a dif-
	ferent job name.

Field Name	Description						
Intorval	Specifies the frequency of the job.						
Interval	For example, Every Week.						
Schedule	Set the date and time of the job using 🛄.						
Job On	For example, 03-24-2020 11:45.						
	Select whether the job uses local or server time.						
Local or Server	 Local: Refers to your local machine. 						
	 Server: Refers to the machine where your application is deployed. 						
	 Add New: This option adds new objects to the existing object list. Existing 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. 						
Import Metadata	 Delete & Reload: This option deletes all the existing metadata and scans only the new objects that have been selected. 						
Options	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. 						
	 Version: Select the check box to create a new version of the envir- 						
	onment. To enter version label and change description, click $^{ m cm}$.						
	Switch Notify Me to ON to receive a job notification.						
Notify Me	For more information on configuring notifications, refer to the Con-						
	figuring Notifications on Scanning Metadata topic.						
	This field is autopopulated with your email ID. You receive email noti-						
Notification	fications about the scheduled job from the administrator's email ID. For						
Email	more information on configuring the administrator's email ID, refer to						
	the <u>Configuring Email Settings</u> topic.						
CC List	Enter a comma-separated list of email IDs that should receive email noti-						

Field Name	Description							
	fications about the scheduled job.							
	For example, ab.dav@xyz.com, cal.kai@xyz.com							

5. Click Schedule.

The metadata scan is scheduled and the scheduled job is listed on the **Scheduled Jobs** tab.

DATA INTELLIGENCE SUITE Metadata	Manager							Ą	Search	۹ 🗘	0	8 8
System Catalogue 🗸	Statistics											^
Sensitive Data Metadata Sensitive Action A and Party Rat Files A System	215 Total Tables	0 Tables With I Expanded M	Logical Names	2410 Total Columns	0/24 Columns Wi Expanded	10 h Logical Names	182/2410 Total Primary Ke Columns	163/24 y Total Foreig Colum	110 In Key Ins	- DQ Score		*
	Mind Map	Data Quality	Documents	Impact as Source	Impact as To	rget Exter	nded Properties So	heduled Jobs C	onfigure Extende	ed Properties W	orkflow Loj	,
B_System BI BO Reports	o Name	Job Type Sched	luled Objects	Previous Fire Time	Next Fire Time	Job State	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
Customer Order Entry												
A models A models A models	ninistrator157786047	Metadata Scan DBO			01-01-2020 12:10	NORMAL	Administrator	2020-01-01 12:05:37.286	Administrator	2020-01-01 12:05:37.286	1	Û

The metadata is scanned at the scheduled time and the environment is updated.

Note: If you have opted to create new version of the environment, then a new version is created and the old version is archived.

Use the following options to work on the scheduled job list:

Edit (🖍)

Use this option to update the scheduled job.

Delete (🔟)

Use this option to delete the scheduled job.

Updating Table Properties

Table properties are classified as technical and business properties. You can update these properties for a table and use user defined fields to enter additional properties of a table.

To update Table Properties, follow these steps:

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

By default, the Column tab opens.

Sys	rstem Catalogue 🗸	4	Columns	Table	e Propertie	Assoc	iations Mind	Map D	ata Quality	
	Sensitive Data	Sto	atistics							
4	Metadata			_			0.40			
	 Image: Starty Flat Files 		8				0/8			
	A_System		Total Columns			Colum	Columns With Logical Expanded Names			
	AdventureWorks									
	AMERISURE									
	 Atlas Sales System 	Data Dictionary								
	B_System	4	Column Nam		olumn	Column	Logical Column	Column	Column Stor	
	BI	#	Column Nam		lias	Class	Name	Datatype	Colonni sion	
	BO Reports			~		01035	Truine .	Dalatype		
	 Customer Order Entry 									
	Data Lake									
	Data Models	1	NEW_NAME					varchar		
	▶ ∎EDW	2	CHANGE_US	E				varchar		
	 erwinDIS 									
	▲ = Data_Migration (∨1.00)	3	OLD_NAME					varcnar		
	dbo.PROJECT_DOCUMEN	4	CREATED_BY					varchar		
		5	CREATED_DA	TE				dateti		
	dbo.QA STATUS CODE	6	MODIFIED_B	(varchar		
	dbo.RDM_CATEGORY	-	-							
	dbo.RDM CHANGE HISTC	/	MODIFIED_D	AIE				dateti		
	dbo.RDM_COLUMN_COD	8	FOLDER_HIER	A				varchar		

3. Click the Table Properties tab.

Columns Table Prop	erties Associations Mind N	ap Data Quality	Documents	Extended Properties	Indexes	Impact Analysis	Forward Lineage
– Technical Properties –							Ø
Table Name	dbo.RDM_CHANGE_HISTORY			Environment Name	Data_M	Nigration	
System Name	erwinDIS			No of Rows			
Synonym Reference				FileType			
				Workflow Status	Draft		
Pueinoss Proportios							
Data Steward	idoe			Logical Table Name			
Table Definition	,			Expanded Logical Nar	me		
Table Comments				Used In Gap Analysis	V		
Table Class				Table Alias			
DQ Score							
User Defined Fields							
User Defined-1			User Defin	ed-6			
							•

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

Field Name	Sub-Field	Description				
		Specifies the physical name of the table.				
	Table Name	For example, Account or Currency.				
	System Name	Specifies the physical name of the system under which the				
		table exists.				
		For example, Enterprise Data Warehouse.				
Technical		You cannot edit this field.				
Properties		Specifies the synonym reference for the table.				
	Synonym Reference	For example, Sales_Rep_Information.				
		This field is autopopulated during the metadata scan. You				
		cannot enter it manually.				
	Environment	Specifies the physical name of the environment under which				
	Name	the table exists.				
Field Name	Sub-Field	Description				
---------------	-----------------------	--	--	--	--	--
		For example, EDW-Test.				
		You cannot edit this field.				
		Specifies the total number of rows in the table.				
		For example, 100.				
		Specifies the workflow status of the table.				
		For example, draft.				
	Workflow Status	By default, Metadata_Manager_Default_Workflow_1 is assigned to all the tables in the Metadata Manager. You can create and re-assign a workflow to all the tables in an envir- onment.				
		For more information on workflow status, refer to the				
	Data Ste- ward	Specifies the name of the data steward responsible for the table.				
Rusiness		For example, Jane Doe.				
Properties		For more information on configuring list of data stewards, refer to the <u>Configuring Data Stewards</u> topic.				
	Table Defin- ition	Specifies the definition of the table.				
		For example: The table contains five columns with emp ID column as the primary key.				
	Table Com-	Specifies comments about the table.				
	ments	For example: The table contains details of the employees.				
		Specifies the table class property.				
	Table Class	For more information on configuring table class, refer to <u>Con-</u> <u>figuring Table and Column Class</u> topic.				
		Specifies the overall data quality score of the table.				
		For example, High (7-8).				
	DQ Score	For more information on configuring DQ scores, refer to the <u>Configuring Data Profiling and DQ Scores</u> topic.				

Field Name	Sub-Field	Description
		Specifies the logical name of the table.
	Logical Table	For example, if the physical name of a table is DIM_Cus-
	Name	tomer, then the logical name of the table is Customer Dimen
		sion.
		Specifies the expanded logical name of the table.
		For example, if the physical name of a table is RM_Resource,
	Expanded	then the expanded logical name of the table is RM Sales Rep-
	Logical Name	resentative.
		You can configure expanded logical name of tables in bulk at system and environment level.
		Specifies whether the table is being used as part of a gap analysis to check table usage in mappings.
	Used in Gap Analysis	Select the check box if the table is used in gap analysis.
		For more information on performing table gap analysis, refer to the <u>Performing Table Gap Analysis</u> topic.
	Sensitive	Specifies whether the table is sensitive.
	Data Indic- ator (SDI) Flag	Switch Sensitive Data Indicator (SDI) Flag to 🖴 to mark the table sensitive.
		Specifies the SDI classification of the table.
	Sensitive	For example, PHI.
	Data Indic-	This list is enabled when Sensitive Data Indicator (SDI) Flag
	ator (SDI)	is switched to 💼. For more information on configuring SDI
	Classification	classifications refer to the Configuring Sensitive Data Indic-
		ator Classifications topic.
	Sensitive	Specifies the description of the SDI classification.
	Data Indic-	For example: Protected Health Information.
	ator (SDI)	It is enabled when Sensitive Data Indicator (SDI) Flag is
	Description	switched to 🛑. The field autopopulates based on the SDI

Field Name	Sub-Field	Description
		classification.
	Table Alias	Specifies the alias name of the table.
		For example, Sales_Representative_Table.

6. Click

The table properties are updated.

You can use user defined fields with different UI labels. For more information on using UI labels for user defined fields, refer to the <u>Configuring Language Settings</u> topic.

You can also hide user defined fields. For more information on hiding user defined fields, refer to the <u>Displaying User Defined Fields</u> topic.

Updating Column Properties

Column properties are classified as technical and business properties. You can update these properties for a column and use user defined fields to enter additional properties of a column.

To update Column Properties, follow these steps:

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

By default, the Column Properties tab opens.

Column Properties As	sociations	Mind Map	Documents	Impact Analysis	Forward Lineage	Reverse Lineage	Extended Properties	Valid Values
– Technical Properties –								Ø
Column Name	RDM_CATE	GORY_ID			Data Type	bigin	t	
Data Domain					Storage Type			
Precision	19				Length	8		
DB Default Value					Scale	0		
Nullable Flag					Identity Flag			
Natural Key Flag					Percent Null Value			
Foreign Key Flag					Primary Key Flag			
Foreign Key Column Name					Foreign Key Table	Name		
Minimum Value					ETL Default Value			
File Starting Position					Maximum Value			
Workflow Status	Draft							
Business Properties —— Data Steward	jdoe				Logical Column N	ame		

3. Click 🖉.

The Edit Column Properties page appears.

dit Column Properties				-
Technical Properties —			E	≝ ×
Column Name *	RDM_CATEGORY_ID	Data Type	bigint	
Data Domain		Storage Type		
recision	19	Length	8	
08 Default Value		Scale	0	
Vullable Flag		Identity Flag		
Natural Key Flag		Percent Null Value		
oreign Key Flag		Primary Key Flag		
oreian Key Column Name		Foreign Key Table Name		
/inimum Value		ETL Default Value		
ile Starting Position		Maximum Value		
Vorkflow Status	Draft			
Business Properties				
Data Steward	jdoe 🔻	Logical Column Name		
Column Definition		Expanded Logical Name		

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	Sub-Field	Description
	Column	Specifies the physical name of the column.
	Name	For example, Object_ID.
	Data Domain	Specifies the data domain values for the column.
		For example, data domain of a Gender column is M and F.
	Precision	Specifies the precision of the column.
Technical		For example: 5, the number 123.45 has a precision of 5 and
Properties		a scale of 2.
	DB Default	Specifies the default value of the column in the database.
	Value	For example, True.
	Nullable Elag	Specifies whether the column allows null values.
	Nullable Llag	Select the check box if the column allows null values.
	Natural Key	Specifies whether the column is a natural key. Select the
	Flag	check box if the column is a natural key.

Field Name	Sub-Field	Description
	Foreign Key	Specifies whether the column is a foreign key.
	Flag	Select the check box if the column is a foreign key.
	Foreign Key	Specifies the actual column name where the column is listed
	Column	as a PK (in case the current column being an FK).
	Name	For example, ID.
	Minimum	Specifies the minimum value of the column.
	Value	For example, minimum value of ID column can be 424.
	File Starting Position	Specifies the starting position in the file.
		Specifies the workflow status of the column.
		For example, draft.
	Workflow Status	By default, Metadata_Manager_Default_Workflow is assigned to all the columns in the Metadata Manager. You can create and re-assign a workflow to all the columns in a table. For more information on the workflow status, refer to
		the Assigning Workflows to the Columns topic.
		Specifies the physical data type of the column.
	Data Type	For example, varchar.
		Specifies the storage type of the column.
	Storage Type	For example, row store/column store in the case of SAP systems.
		Specifies the physical length of the column.
	Length	For example, if the column datatype is char(5), then its phys- ical length is 5.
		Specifies the physical scale of the column.
	Scale	For example: The number 123.45 has a precision of 5 and a scale of 2.
	lala atta - Ela	Specifies whether the column is used as an identity flag.
	Identity Flag	Select the check box if the column is used as an identity flag.

Field Name	Sub-Field	Description
	Percent Null	Specifies the percentage of null values in the column.
	Value	For example, 10%.
	Drimory Koy	Specifies whether the column is a primary key.
	Flag	Select the check box if the column is used as the primary key.
	Foreign Key	Specifies the actual table name where the column is listed as
	Table Name	a PK (in case of the current column being an FK).
	ETL Default	Specifies the default ETL value of the column during the load
	Value	process.
	Maximum	Specifies the maximum value of the column.
	Value	For example, maximum value of ID column can be 1503.
		Specifies the data steward responsible for the column.
	Data Ste- ward	For example, Jane Doe.
		For more information on configuring list of data stewards,
		refer to the <u>Configuring Data Stewards</u> topic.
	Column Definition	Specifies the definition of the column.
		For example: The column is a primary key that allows 5
		alpha-numeric characters.
	Column Com-	Specifies the comments about the column.
Business	ments	For example: The column provides unique identification of
Properties		employee in the employee table.
	Sensitive	Specifies whether the column is sensitive.
	ator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to 뤝 to mark the
	Flag	column sensitive.
	Sensitive	Specifies the SDI classification of the column.
	Data Indic-	For example, PHI.
	ator (SDI)	This list is enabled when Sensitive Data Indicator (SDI) Flag
	Classification	is switched to 🔒. For more information on configuring SDI

Field Name	Sub-Field	Description
		classifications, refer to the Configuring Sensitive Data Indic-
		ator Classifications topic.
	a	Specifies the description of the SDI classification.
	Sensitive	For example: Protected Health Information.
	ator (SDI)	It is enabled when Sensitive Data Indicator (SDI) Flag is
	Description	switched to 💼. The field autopopulates based on the SDI classification.
		Specifies the column class property.
	Column Class	Select a column class. For more information on configuring column class, refer to the <u>Configuring Table and Column</u> <u>Class</u> topic.
		Specifies the overall data quality score of the column.
	DO Scoro	For example, High (7-8).
		For more information on configuring DQ scores, refer to the <u>Configuring Data Profiling and DQ Scores</u> topic.
		Specifies the logical name of the column.
	Logical Column Name	For example, if the physical name of the table is CUST_ID_ NUM, then the logical name of the table is Customer Iden- tification Number.
		Specifies the expanded logical name of the column.
	Expanded	For example, if the physical name of the column is Resource_ID, then the logical name of the .
		You can also configure expanded logical name of columns in bulk at <u>system</u> and <u>environment</u> level.
	Llood in Corr	Specifies whether the column is being used in a gap analysis for usage in mappings.
	Used in Gap Analysis	Select the check box if the column is used in the gap ana- lysis.
		For more information on performing column gap analysis,

Field Name	Sub-Field	Description
		refer to the <u>Performing Column Gap Analysis</u> topic.
	Column Alias	Specifies the alias name of the column.
		For example, Resource_ID.
	Business Key	Specifies whether the column is a business key.
	Flag	Select the check box if the column is a business key.

5. Click 💾.

The column properties are updated.

You can use user defined fields with different UI labels. For more information on using UI labels for user defined fields, refer to the <u>Configuring Language Settings</u> topic.

You can also hide user defined fields on the Column Properties tab. For more information on hiding user defined fields, refer to the <u>Displaying User Defined Fields</u> topic.

Validating Data

You can validate the data in the environment at table and column levels. The data is validated against the forms (Table Properties or Column Properties) associated with the environment. The forms can be created, configured, and associated with environments in the Form Validation Settings.

To validate data, follow these steps:

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



- 3. Hover over Validate Data.
- 4. Use the following options:

Table

To validate tables in the environment, click **Table**.

Column

To validate columns in the environment, click Column.

Both

To validate tables and columns both, click **Both**.

The data is validated.

The columns or tables that fail mandatory field criterion are marked with red.

The columns or tables that fail regular expression criterion are marked with orange.

🗖 Val	🗆 Validate Data - Column (3rd Party Rat Files/Sample) _ 🗆 X							
● Ma	Andatory Regular Expression Failed Export to Excel Cancel							
	Columns			•				
#	Entities	Attributes	Column Alias					
1	dbo.PROJECT_DOCUMENT_TEMPLATES	PROJ DOC ID	•					
2	dbo.PROJECT_DOCUMENT_TEMPLATES	PROJ DOC NAME	•					
3	dbo.PROJECT_DOCUMENT_TEMPLATES	PROJ DOC INTEDED USE DESCR	•					
4	dbo.PROJECT_DOCUMENT_TEMPLATES	PROJ DOC TYPE	•					
5	dbo.PROJECT_DOCUMENT_TEMPLATES	REQD FLAG	•					
6	dbo.PROJECT_DOCUMENT_TEMPLATES	PROJ DOC REF NUMBER	•					
7	dbo.PROJECT_DOCUMENT_TEMPLATES	PROJ DOC OWNER	•					

You can download the validation report in the XLSX format. To download the validation reports, click **Export to Excel**.

Assigning Codesets to Columns

You can create codesets in the Codeset Manager and assign them to a source or target column as valid values. You can also export the valid values in the XLSX format.

To assign codesets to columns, follow these steps:

- 1. In the System Catalogue pane, click a column.
- 2. Click the Valid Values tab.

Assoc	iations Mind /	Map Docum	ents Impact Analysis	Forward Lineage	Reverse Lineage	Extended Properties	Valid Values	Workflow Log	,
						Ass	ign/Remove Codesets	Export to Excel	
#	Code Name	Code Value	Code Description	System Name/Environment	Codeset Name	Version	Published Flag	Category Hierarchy	
]
	No Records Found								

3. On the Valid Values tab, click Assign/Remove Codesets.

The Codesets page appears.

Codesets	_ 🗆 X
Save	Cancel
- VI COOBBIS	<u>^</u>
Gender Codes(1.00)	~
a - La Data_Integration	
Codesets	
▶ Integrated_Codeset(1.00)	
a - <mark></mark> EDW	
Country Codes[1.02]	
• = = = = = = = = = = = = = = = = =	
Marital Status(1.01)	
🖌 📲 erwin DIS	
Sales_Codeset(1.00)	
4 - <mark></mark> ICD 10	
Certain zoonotic bacterial diseases(1.00)	
Image: International infectious diseases (1.00)	
Malignant neoplasm of ovary(1.00)	
Multiple myeloma(1.00)	
▶ Improvements [1.00]	
4 - 🚂 ICD 9	
A-G Codesets	
▶ 🔄 mintestinal infectious diseases(1.00)	
Multiple myeloma(1.00)	
▶	
s	~
Note: Assiging/Removing codeset will reset workflow status of column(s) to initial stage	

4. Select the required codesets and click **Save**.

The codesets are saved on the Valid Values tab.

 Assoc 	iations Mind	Map Docume	nts Impact Analysis	Forward Lineage	Reverse Lineage	Extended Properties	s Valid Values	Workflow Log		
	Assign/Remove Codesets									
#	Code Name	Code Value	Code Description	System Name/Environment	Codeset Name	Version	Published Flag	Category Hierarchy		
1	Admin	1		Project_System	Sales_Codeset	1.00	Ν	erwin DIS		
2	Joe Villers	4		Project_System	Sales_Codeset	1.00	Ν	erwin DIS		
3	Kartik Sridhar	2		Project_System	Sales_Codeset	1.00	Ν	erwin DIS		
4	Resource_Name	3		Project_System	Sales_Codeset	1.00	N	erwin DIS		

You can download the assigned codesets in the XLSX format. To download the assigned codesets, click **Export to Excel**.

For more information on managing codesets, refer to the <u>Maintaining Enterprise Code</u>-<u>sets</u> section.

Viewing Workflow Logs of Tables

You can view workflow logs of a table in the Metadata Manager. It displays the current state of the table in the workflow. By default, the Metadata_Manager_Default_Workflow_1 is assigned to all the tables. You can create your own workflow and assign it to tables. For more information, creating and assigning workflows to tables, refer to the <u>Managing</u> <u>Metadata Manager Workflows</u> section.

To view workflow log of tables, follow these steps:

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

 Image Data Quality Documents Extended Properties Indexes Impact Analysis Forward Lineage Reverse Lineage Test Specification Workflow Log

 Metodata_Manager_WF -- Table_Workflow

 Collegese Roles
 Collegese Roles

 On Create
 Datt

 Review
 Rel Approval

 Publish
 Publish

The current workflow stage blinks in the diagram.

Use the following options:

User Comments

To view users and the comments entered by the users in each stage, hover over

Expand/Hide Users and Roles

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

Collapse/Expand Roles

This option is enabled when you are in the Expand Users and Roles view. Use this option to collapse or expand roles.

Collapse/Expand Users

This option is enabled when you are in the Expand Users and Roles view. Use this option to collapse or expand users.

Export Image

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

Viewing Workflow Logs of Columns

You can view workflow logs of a column in the Metadata Manager. It displays the current state of the column in the workflow. By default, the Metadata_Manager_Default_Workflow is assigned to all the columns. You can create your own workflow and assign it to columns. For more information, creating and assigning workflows to columns, refer to the <u>Managing</u> <u>Metadata Manager Workflows</u> section.

To view workflow log of columns, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, click a column.
- 3. In the central pane, click the Workflow Log tab.

The current workflow stage blinks in the diagram.



Use the following options:

User Comments

To view users and the comments entered by the users in each stage, hover over

Expand/Hide Users and Roles

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

Collapse/Expand Roles

This option is enabled when you are in the Expand Users and Roles view. Use this option to collapse or expand roles.

Collapse/Expand Users

This option is enabled when you are in the Expand Users and Roles view. Use this option to collapse or expand users.

Export Image

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

Associating Tables

You can associate tables with business assets, systems, environments, tables, and columns. You can also view mind map and association statistics.

Ensure that:

- Business assets are enabled. You can add new business assets and enable them in Business Glossary Manager Settings.
- Relationship between table and the asset type is defined. You can define associations and relationships in <u>Business Glossary Manager Settings</u>.

To associate tables with asset types, follow these steps:

- 1. In the **System Catalogue** pane, click the required table.
- 2. In the central pane, click the **Associations** tab.
- 3. Select an asset type from the drop down.

4	Columns	Table Properties	Associatio	ns Mind Map
В	usiness Term	× •		
В	usiness Term		rm Name	Description
E	nvironment		IIII Nullie	Description
S	/stem			
-			-	

4. Click +.

The Relationship Associations page appears.

🗖 Relatio	onship Associations					-	- x				
						Save Can	cel				
Current C	Context:	dbo.ADS_AS	SOCIATIONS								
Current C	Context Type:	Table	able								
Relations	hip Name:	is associate	ed with			-					
Search (p	partial matches):										
	Term Name	Description	Definition	Catalog Name	Catalog Hierarchy	Data Steward					
	3rd Party Preference Option Code		Records the option the Customer has chosen not to be offered products from 3rd Party's e.g. selling	Customer Management	Customers Business → Customers Business As Is → Information → Customer Management	janedoe	^				
	44900		Incision and drainage of appendiceal abscess; open	DATA ELEMENTS	NASDAQ HEALTHCARE - IMP 1 → DATA ELEMENTS	N/A					
	44900		Incision and drainage of	DATA ELEMENTS	NASDAQ HEALTHCARE - IMP		~				
1-2	3 4 5 →		to 10 of 766								

- 5. Select **Relationship Name** and the asset type.
- 6. Click Save.

The asset is added to the table.

4	Columns	Table Properties	Associations	Mind Map Data Qu	ality Documents Ex	tended Properties	ndexes Impact Anal	ysis Forward Lineage
Busi	ness Term	-						î +
	Actions Relation		Relationshir Term Name Description		Definition Catalog Name		Catalog Hierarchy	Data Steward
	1	is associated with	3rd Party Preference Option Code		Records the option the Customer has chosen not to be offered products from 3rd Party's e.g. selling	Customer Management	Customers Business → Customers Business As Is → Information → Customer Management	janedoe

Use the following options under the **Actions** column:

Edit Association (

Use this option to edit the association.

Delete Association ($\mathbf{\overline{D}}$)

Use this option to delete the association.

To view mind map, click the **Mind Map** tab. For more information on working on mind maps, refer to the <u>Viewing Mind Maps</u> topic.

Associating Columns

You can associate columns with business assets, systems, environments, tables, and columns. You can also view mind map and association statistics.

Ensure that:

- Business assets are enabled. You can add new business assets and enable them in Business Glossary Manager Settings.
- Relationship between column and the asset type is defined. You can define associations and relationships in Business Glossary Manager Settings.

To associate columns with asset types, follow these steps:

- 1. In the **System Catalogue** pane, click the required column.
- 2. In the central pane, click the **Associations** tab.
- 3. Select an asset type from the drop down.

4	Column Properties	Associatio	ons Mind Map
1	Business Policy	× •	
B	Susiness Policy		icy Name
B	Susiness Term		icy Nume
S	ystem		
1			

4. Click +.

🗖 Relatio	onship Associations					-	□ ×
						Save Cano	el
Current C	Context:	RESOURCEID					
Current C	Context Type:	Column					
Relations	hip Name:	is associate	d with			-	
Search (p	partial matches):						
	Policy Name	Description	Definition	Catalog Name	Catalog Hierarchy	Data Steward	
	Employee Identification Code Format		Coae is 10 characters long of format aannnnnaaaa where the first two characters are	Internal Org Policies	Internal Org Policies	N/A	^
	Employee moves international location		The employee will receive a new Identification Code if they move country	Internal Org Policies	Internal Org Policies	N/A	ł
	Fiscal Policy		fiscal policy is the use of government revenue collection	HV	HV	•	~
- 1-2	Records from	n 1 to 10 of 15					

- 5. Select **Relationship Name**, and asset type.
- 6. Click Save.

The asset is added to the column.

DATA INTELLIGENCE SUITE Metadata A	Manage	r					A Searc	sh	९ ‡ 🛛 🖻 🖪
System Catalogue 🗸	۰ c	olumn Properties	Associat	ons Mind Map	Documents Impo	act Analysis Forward	Lineage Reverse Lir	eage Extended Prop	erties Valid Values
Sensitive Data	Busi	ness Policy	•						î +
Imeradual		Actions	Relationship Name	Policy Name	Description	Definition	Catalog Name	Catalog Hierarchy	Data Steward
AdventureWorks AMERISURE									
 Aflas Sales System B_System BI BO Reports 		î	is associated with	Employee Identification Code Format		The Employee ID Code is 10 characters long of format aannnnnaaaa where the first two characters are	Internal Org Policies	Internal Org Policies	N/A
Customer Crider Entry Customer Customer Entry Customer Customer Entry Customer Customer Entry Customer Entry									

Use the following options under the **Actions** column:

Edit Association (🖍)

Use this option to edit the association.

Delete Association ($\mathbf{\overline{D}}$)

Use this option to delete the association.

To view mind map, click the **Mind Map** tab. For more information on working on mind maps, refer to the <u>Viewing Mind Maps</u> topic.

Versioning Environments

You can create versions of an environment and keep a legacy of old metadata. You can also track changes by comparing the two versions of the environment.

To create new versions of environments, follow these steps:

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



3. Click New Version.

The New Version page appears.

New Version		_ 🗆 ×
		li ×
Environment Name*	A_Environment	
Version	1.01	
Version Label		
Change Description*		E 12 12 🖌
		
		-

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
Environment	Specifies the name of the environment.
Name	For example, EDW-Test.
Varsian	Specifies the new version of the environment.
VEISION	For example, 1.02.
	Specifies the version label of the environment.
Version	For example, Beta.
Label	For more information on configuring version display of environments,
	refer to the <u>Configuring Version Display</u> topic.
Change	Specifies the description of the changes made in the environment.
Description	For example: A new table, EMP_Details was added in the environment.

5. Click

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

The old version of the environment is archived. You can also <u>compare the two ver</u>sions of the environment.

Comparing Environments

You can compare two environments and trace the table and column level changes. Comparing two environments enables you to debug scanned metadata and makes your data integration project efficient.

To compare environments, follow these steps:

1. In the System Catalogue pane, select any two environments.



You can use CTRL or Shift Key to select two environments.

2. Click Compare Environments.

The Compare Environments page appears. By default, it opens the Table Level Changes tab.

1		Compare Environments								_ 🗆 X
l										*
l	•	Table Level Changes Colum	nn Level Changes							•
	#	Change Description	System Name	Environment	Table	Definition	Logical Name	Expanded Logical Name	Associated Business Term	Comments
	1	Table Logical Name , Table Comments	AdventureWorks	AdentureWorks_Sto	dbo.DatabaseLog					
	2	Table Logical Name , Table Comments	AdventureWorks	AdventureWorks	dbo.DatabaseLog		hhhh			IJ
	3	Table Logical Name	AdventureWorks	AdentureWorks_Sto	dbo.DimAccount					
	4	Table Logical Name	AdventureWorks	AdventureWorks	dbo.DimAccount		Account Dimension			

To view column level changes, on the **Compare Environments** page, click the **Column Level Changes** tab.

Column level changes are displayed.

To download the comparison report, click 🕙.

The comparison report is downloaded in the XLSX format.

Downloading Data Dictionaries

Once the metadata is scanned and stored in the repository, you can instantly view and export data dictionary at the environment and table levels.

A data dictionary at environment level includes definitions of all the tables and columns available in the environment. Whereas, a data dictionary at table level includes the definitions of the table and its columns.

Environment Level

To download data dictionaries at environment level, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, right-click an environment.
- 3. Hover over **Data Dictionary**.



4. Click Download.

The Data Dictionary-Download Options page appears.



5. Use the following options:

Default Template Download

Use this option to download the data dictionary in a default template. The default template includes technical and business properties of tables and columns.

Advanced Template Download

Use this option to download the data dictionary in an advanced template. You can customize an advanced template to include additional information, such as Indexes Summary, Extended Properties for Tables, Valid Values, and Extended Properties for columns.

6. Click 🛃 .

Data dictionary is downloaded in the XLSX format.

Table Level

To download data dictionaries at table level, follow these steps:

- 1. In the System Catalogue pane, right-click a table.
- 2. Hover over Data Dictionary.



3. Click Download.

The data dictionary of the selected table is downloaded in the XLSX format.

You can also <u>view data dictionary report</u> at system level and <u>update data dictionary</u> at environment level.

Uploading Data Dictionary

You can update and upload a data dictionary at environment level in the XLSX format. To update data dictionary, you can either use an existing XLSX file or download a data dictionary file from a suitable environment. Ensure that the XLSX file follows the correct template. For more information on downloading a data dictionary in XLSX, refer to the Downloading Data Dictionary topic.

To upload data dictionaries at environment level, follow these steps:

- 1. In the **System Catalogue** pane, right-click an environment.
- 2. Hover over **Data Dictionary**.



3. Click **Upload**.

The Upload Metadata page appears.



4. Drag and drop the updated data dictionary file or use 😑 to upload the file.

You can use the following options to select headers for the XLSX file:

Enable Header Selection

Use this option to select headers for the XLSX file. Select the check box and click

The Upload Metadata page appears.

E	🗖 Upload Metadata 📃 🗖 🗙										
Ех	Excel Metadata Preview Screen Please use first row (double click on NOT IN USE Cell) to set each column's identity!										
	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE	NOT IN USE			
1	TABLE_NAME	TABLE_DEF	TABLE_SDI_FLAG	TABLE_SDI_CLASSIFIC/	TABLE_SDI_DESCRIPTIC	TABLE_COMMENTS	LOGICAL_TABLE_NAM	COLUMN_NAME (
2	Citizens						Citizens	CitizenID			
3	Citizens						Citizens	CitizenName			
4	Citizens						Citizens	EmployeeID			
5	Employees						Employees	EmployeeName			
6	Employees						Employees	EmployeeID			

To select headers, double-click the **NOT IN USE** cell.

Skip & Assume first row as header

You can use this option only when the Enable Header Selection check box is selected. Use this check box to use the first row as header.

Select the check box and click 1.

The Upload Metadata page appears. The first row in the XLSX file appears as the header.

🗖 Upload Metadata 📃 🗆 🗙								
Excel Metadata Preview Screen Please use first row (double click on NOT IN USE Cell) to set each column's identity!								
	Table Name	Table Definition	Table SDI Flag	Table SDI Classificatio	Table SDI Description	Table Comments	Logical Table Name	Column Name
1	Citizens						Cifizens	CitizenID
2	Citizens						Citizens	CitizenName
3	Citizens						Cifizens	EmployeeID
4	Employees						Employees	EmployeeName
5	Employees						Employees	EmployeeID

To select alternate headers, double-click the header cell.

5. Click 1

The data dictionary is updated at the environment level.

Viewing Data Dictionary Report

You can view a data dictionary report at the system level. The data dictionary report includes all the environments in the system and it can be exported in various formats, such as HTML, PDF, and MS Excel.

Note: It is meaningful to view data dictionary report after scanning metadata into an environment.

To view data dictionary at system level, follow these steps:

1. In the **System Catalogue** pane, right-click a system.



2. Click Report - Data Dictionary.

The Data Dictionary Report appears. You can use Select System to view the data dictionary reports of any system.



Use the following options to export the data dictionary report:

HTML (🔊)

Use this option to export the report in the HTML format.

PDF (🔼)

Use this option to export the report in the PDF format.

MS Excel (🕙)

Use this option to export the report in the XLSX format.

MS Word (🕋)

Use this option to export the report in the DOCX format.

RTF (🕮)

Use this option to export the report in the RTF format.

Running Impact Analysis

After mapping source metadata with target metadata, you can run impact analysis on the technical assets. The 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.

You can run impact analysis at the following levels:

- Environment
- Column
- Table
Environment

You can perform impact analysis on an environment and analyze its impact as source and target.

To perform impact analysis at environment level, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, click an environment.
- 3. In the central pane, click any one of the following tabs:
 - Impact as Source: Click this tab to analyze the impact of the environment as a source.

The Impact as Source tab shows a list of mappings where the environment is a source.

System Catalogue 🗸	Statisti	cs						^
A_System AdventureWorks AdventureWorks AdventsURE Ads Soles System		6 Total Tables	0 Tables With Logical Expanded Names	30 Total Columns	0/30 Columns With Logical Expanded Names	0/30 Total Primary Key Columns	0/30 Total Foreign Key Columns	* *
 B_System BI 	•	Data Dictionary E	nvironment Details Data (Quality Documents	Impact as Source	Impact as Target Extend	ed Properties Scheduled	Jobs Config
BO Reports								
 Customer Order Entry Data Lake 		Project Name		Mapping Name		Target Details		
Cloudera HDFS (v1.00)						Environment Name		
Data Models								
erwinDIS	1	AdventureWorks_	Migration	DimProduct		AdventureWorks		
▶ jDEdwards	2	Data Lake Migrat	ion	Load_Customers		EDW-PRD		

 Impact as Target: Click this tab to analyze the impact of the environment as target.

The Impact as Target tab shows a list of mappings where the environment is a target.

System Catalogue	< Si	tatistics							^
	^	Te	6 Dtal Tables	0 Tables With Logical Expanded Names	30 Total Columns	0/30 Columns With Logical Expanded Names	0/30 Total Primary Key Columns	0/30 Total Foreign Key Columns	•
B_System	4	Dat	a Dictionary E	nvironment Details Data (Quality Documents	Impact as Source	Impact as Target Extend	ed Properties Scheduled	Jobs Config
BO Reports									
 Customer Order Entry Data Lake 		*	Project Name		Mapping Name		Source Details		
Cloudera HDFS (v1.00) Twitter Feeds (v1.00)							Environment Name		
Data Models									
erwinDIS		1	Data Lake Migrat	ion	Load_Customers		COE		
JDEdwards		2	ERP		Test		COE		

You can download the impact analysis in the XLSX format. To download the impact analysis, click 2.

You can also perform impact analysis at the following levels:

- Table
- Column

Table

A table can be a source, target, or both in a mapping specification. It can also be used for transformations, such as business rules and lookups in a mapping project. The impact analysis on a table helps you identify these impacts of the table on mapping projects.

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	Extended Properties	Indexes	mpact Analysis	Forward Lineage	Reverse Lineage	Test Specific
Sumn	nary - Direct Impact		Summary - Indirect Imp	act		<	Audit Information		~ ~
							Audit	Information	
1			4 4		_ _	/pstream Impact	Created By	Administrator	^
1		As Source	e 3			Jownstream Impact	Created Time	01/10/2020 18:	28:16
1		As Targer	1 2		Ir	n Business Rule	Modified By	Administrator	
1					U	n Source Extract SQL	Modified Time	01/10/2020 18:	28:16
1		9			ir 📒 ir	n Lookups			~
L .				Indirect Impact			<		\rightarrow
4	Direct Impact	Indirect Impact Othe	er Impacts						•
As So	urce								~
#	Project Name	Mapping Name	e Targel Infor	mation				Business Rule	
			Table	Enviro	nment	System			
1	ERP	Integration	dbc.RM_RES	OURCE_New Integration	tion_Target	Erwin_Sales_Target			~
2	Erwin_Project	Integration	dbc.RM RES	OURCE New Integrat	tion_Target	Erwin_Sales_Target			
3	Erwin_Projoct	Intogration	dbc.RM_RES	OURCE_Now Integrat	tion_Targot	Erwin_Salos_Targot		FLOOR	
		lan e			p = 1				× I
As Ta	rget								~
#	Project Name	Mapping Nam	ne Source Inf	ormation				Business Rule	
			Table	Envir	onment	System			
1	Erwin_Fob	Integration_Feb	dbo.ADS A	SSOCIATIONS Data	Migration	orwinDIS			~
4									24

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 state weat	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 ASSO	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
										髱 🔁
Sumn	nary - Direct Impa		< Summe	ary - Indirect Impa	ct			 Audit Information 		
							Upstream Impact	Audit	Information	
			As Source				Downstream Impact	Created By	Administrator	~
			As Target	2		_	📄 in Business Rule	Created Time	01/10/2020 18:2	8:16
			ro rolgor				📕 in Source Extract SQL	Modified By	Administrator	
		9			Indirect Impact		n Lookups	Modified Time	01/10/2020 18:2	8:16 🗸 🗸
	Direct Impact	Indirect Impact	Other Impacts							
la Du	innen Dulen			-						
ШВО	NINESS KOIES	_	_		_		_	_	_	^
#	Project Name	Mapping Name	Source System	:	Source Environment	Source Tal	ble B	usiness Rule	Extended Business	Rule Tai
1	Erwin_Sales	Integration	Erwin_Sales	In	tegration	dbo.RM_RE	SOURCE db	o.RVI_Resource		<u>(</u>
<										> ×
in So	rce Extract SQL									^
#	Project Name		Mapping Name		Source Extract SQL					
1	Erwin Sales		Integration		Select * from dbo.RM	RESOURCE				~
	-		0							×
In Lo	okups									*
#	Project Name	Mapping Name	Source System	Se	ource Environment	Source Table	e Loo	kup Condition	Lookup On	Looku
1	Erwin_Soles	Integration	Erwin_Sales	Inte	egration	dbc.RM_RESC	SELEC RESC RESC DURCE RESC DURCE RESC	CT RESOURCEID, IURCENAME, IURCEDESC, IURCECELLPHONE, IURCEHOMEPHONE, IURCEMAIL FROM	RESOURCENAME	RES(

You can also perform impact analysis at the following levels:

- Environment
- Column

Column

A column can be a source, target, or both in a mapping specification. It can also be used for transformations, such as business rules and lookups in a mapping project. The impact analysis on a column helps you identify these impacts of the column on mapping projects.

To perform impact analysis on columns, follow these steps:

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

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

•	Column Properties I	Extended Properties	Data Lineage Imp	oact Analysis Mind Ma	ip Associo	ations V	Norkflow Log Va	id Values I	Documents	•
Sum	mary - Direct Impact		Summary - Indi	irect Impact				Audit Information	n	>
								Audit	Information	
			7				Upstream Impact	Created By	Administrator	
	,	As S	ource 4	4			Downstream Impact	Created Time	02/26/2020 04:01:10	
		As T	arget 3 2	2			In Source Extract SQL	Modified By	Administrator	
					0		In Lookups	Modified Time	02/26/2020 04:01:10	
				Indirect Impo	act					
	Direct Impact	Indirect Impact	Other Impacts							eb
As S	ource									Self H
#	Project Name	Mapping Name	Target Information						Business Rule	
			Column	Table	E	nvironment	System			
1	Lineage Demo	Informatica_m_CBDR_	COD_ACCT_NO	SQ_BD_MIS_CH_AC	CCT_MAST So	ource Qualifier	Informatic	а		
As To	arget									~
#	Project Name	Mapping Name	Source Information						Business Rule	
	-		Column	Table	E	nvironment	System			
1	Lineage Demo	Talend_staging	COD_ACCT_NO	tFilterRow_1	tF	ilterRow_1	TALEND			

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

It displays the upstream and downstream impact of the column.

•	Column Properties	Extended Properties	Data Line	age	Impact Analysis	Mind Map	Associations	Workflow Log	Vali	d Values	Documents		•
Sun	nmary - Direct Impac	et	<	Summary -	Indirect Impact				<	Audit Informat	ion		>
										Audit		Information	
				7	7			Upstream In	pact	Created By		Administrator	
		As	Source	5	4			Downstream	n Impact	Created Time		02/26/2020 04:01:1	0
	1	1 As	Target	3		2		In Business R	ule	Modified By		Administrator	
				1			0 0	In Source Ex	tract SQL	Modified Time		02/26/2020 04:01:1	0
				U 🗖									
L						Indirect Impact							
4	Direct Impact	Indirect Impact	Other Imp	pacts									de p
Ups	tream Impact												self I
#	Project Name	Mapping Name	Source Co	lumn	Source T	able	Source En	vironment/System	Business R	ule	Target Co	lumn	т
1	Lineage Demo	Informatica_m_CBDR		NO	dbo.BD_M	IS_CH_ACCT_MAS	ST STAGING/TA	ALEND			COD_ACCT	<u>T_NO</u>	SQ_ ^
2	Lineage Demo	Informatica_m_CBDR		NO	SQ_BD_M	IS_CH_ACCT_MAS	ST Source Qual	ifier/Informatica			COD_ACC1	T_NO	EXP
3	Lineage Demo	Informatica_m_CBDR		NO	SQ_BD_M	IS_CH_ACCT_MAS	ST Source Qual	ifier/Informatica			INP_COD_/	ACCT_NO	LKP.
4													· · · · ·
Dov	vostream Impact												~
#	Project Name	Mapping Name	Source Co	olumn	Source	Table	Source E	nvironment/System	Business	Rule	Target	Column	Tarı
1	Lineage Demo	Talend staging	COD ACCT	T NO	tFilterRov	v 1	tFilterRow	1/TALEND			COD AC	OCT NO	d ^
2	Lineage Demo	Talend staging	COD ACCT	 Г NO	tMap 1	-	tMap 1/TA	LEND	Relational.I	SNULL(row2.CO	D ACCOD AC	CT NO	ť
3	Lineage Demo	Talend staging	COD ACCT	 Г NO	tLogRow	1	tLogRow 1	1/TALEND		,	COD AC	CT NO	ť
						-				_			•
-										_			•

To view other impacts, click the Other Impacts tab.

It displays the impact of the column on:

- Business rules
- Source extract SQL
- Lookups



Running Lineage Analysis

After mapping source metadata with target metadata, you can run lineage analyzer in Metadata Manager. The generated lineage report helps you trace the data's origin, its transformations, and its destination after source to target mappings.

You can run the lineage at the following levels:

- System
- Environment
- Table
- Column

System

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

Viewing Lineage

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

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

By default, the dual lineage of the system appears.



To view forward lineage, click the Forward tab.

Data Dictionary System Details	Extended Properties Data Lineage	Mind Map Associations	System D	ocuments Configure Extended Pro
Dual Forward Reverse				
Lineage For : SQLTechPubs	Logical Name Expanded	Logical Name Sensitivity Indicator	Overvie	ew Lineage 🔼 🄀 🖊 🛛
				System Details
				Property Value
				System Name SQLTechPubs
SQLTechPubs	💭 SQL System 🤌 📓 TechPubs			Primary Move Type Both
•		¥		Business Purpose It contains sales sou
	\			Environment Details
	Oracle TechPubs	☐ Salesforce → 🚦 TechPubs		# Environment
	¥		×	1 SQLTechPubs
				Extended Properties
1			•	Summary

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

Data Dictionary System Details	Extended Properties Data Lineage	Mind Map Associations	System Documents	Configure Extended Pro
Dual Forward Reverse		_		
Lineage For : SQLTechPubs	Logical Name Expande	d Logical Name Sensitivity Indicato	r Overview Lineage	N X 🛛 🖊 🚥
			System Details	
			Property	Value
			System Name	SQLTechPubs
			Primary Move Type	Both Here
erwinDoc	SQL System SQL Env	SQLTechPubs	Business Purpose	It contains sales source
	∮ i TechPubs	SQLTechPubs	Environment Deta	ils 🗸
	TABLEUAU		# Environme	nt
	PRESENTATION LAYER			
	×		1 erwinSal	es 🕌
			Extended Propert	ies 🔶
•			Summary	-

Working on Lineage

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

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

Lineage For : SQLTechPubs	Logical Name Expanded Logical Name Sensitivity In	dicator Overview	w Lineage 🚺 🏅	S 🛛 🖊 🖾
			System Details	
			Property	Value
			System Name	SQLTechPubs
			Primary Move Type	Both Jes
C TABLEUAU C TABLEUAU	SQLTechPubs SQL System SqL System		Business Purpose	It contains sales s
×		۲	Environment Deta	ails •
	Grade	R.	# Environmer	ıt
		•		
			1 erwinSale	es 🗸
			Extended Propert	ties 🔺
		•	Summary	*

Use the following options:

Sensitivity Indicator

Use this option to view sensitivity of the environments in the lineage.

For example, in the following lineage, SQLTechPubs and SQL Env environments are sensitive.



Overview Lineage

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

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



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

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



Collapse/Expand ()

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

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



Auto Expand/Autofit (23)

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

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



Export to Image (🖂)

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

Export to PDF (

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

Export to Excel

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

Highlighting Lineage Path of an Environment

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

	 SQLTechPubs	🖵 Oracle
🛄 erwinDoc	erwinSales	TechPubs
erwinDOC	▲ → SQLTechPubs	
	_	
		T T
	V	_

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



System Details

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

Environment Details

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

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

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

Extended Properties

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

For more information, on configuring extended properties of a system, refer to the <u>System</u> topic.

Summary

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

Environment

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

Viewing Lineage

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

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

By default, dual lineage of the environment appears.



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

Data Dictionary Environment Details Dual Forward Reverse	Extended Properties Data Lineage Impact as Source Impact as Target	t Mind Map	Associations	Workflow Log	Docur
Lineage For: SQLTechPubs \rightarrow SQLTechPubs	Logical Name Expanded Logical Name Se	nsitivity Indicator	Overview Lineage		
		*	Environment Deta	ils	Help
			Property	Value	Self
			System Name	SQLTechPubs	
SQLTechPubs	Oracle Salestore Salestore TechPubs	bs	Environment Name	SQLTechPubs	
> ⊞ dbo.Categories	APPQOSSYS.WLM_CLASSIFIER_PLAN				
dbo.Customers			Environment Type	SqlServer	•
	Y		Table Details		•
	SQL System TechPubs		Extended Properti	es	•
•	→ dpo.Categories	• •	Summary		•

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

Data Dictionary Environment Details Exter Dual Forward Reverse	nded Properties Data Lineage Impact	as Source Impact as Target	Mind Map	Associations Wo	orkflow Log Docur
Lineage For: SQLTechPubs → SQLTechPubs	Logical Name	Expanded Logical Name Sensitiv	rity Indicator	Overview Lineage	X 🛛 🔺 💷
			A	Environment Details	r Help
				Property	Value
erwinDoc	TARI FILALI	SQLTechPubs		System Name	SQLICHIPUDS
erwinDOC	PRESENTATION LAYER Account	SQLTechPubs		Environment Name	SQLTechPubs
T				Environment Type	SqlServer
				Table Details	•
			•	Summary	•

Working on Lineage

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

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

Lineage For: SQLTechPubs \rightarrow SQLTechPubs	Logical Name	Expanded Logical Name Sensitivity Indicator		Overview Lineage	٨	80	4	×
			*	Environment D	etails			Help
				Property		Value		Self
				System Name		SQLTechPut	bs	
				Environment Nam	ne	SQLTechPut	bs	
erwinDoc	TABLEUAU	SQLTechPubs						
erwinDOC	PRESENTATION LAYER	SQLTechPubs		Environment Type	e	SalServer		
CustDetails	→	🔺 🛶 🚽 🖩 dbo.Categories						۳
		→ III dbo.Customers		Table Details				•
×		Y		Extended Prope	erties			•
4			•	Summary				•

Use the following options:

Logical Name

Use this option to view logical names of the tables in the lineage.

For example, in the following lineage, the table names are replaced with their logical names.



Expanded Logical Name

Use this option to view expanded logical names of the tables in the lineage.

For example, in the following lineage, the table names are replaced with their expanded logical names.



Sensitive Data Indicator

Use this option to view sensitivity of tables in the lineage.

For example, the following lineage, displays the sensitivity of the tables.

	Logical Name	Expanded Logical Name	Sensitivity Indica	tor Overview Lineage
			^	Environment Details
TABLEUAU		SQLTechPubs		Broporty
PRESENTATION LAYER		SQLTechPubs		Property
──> 🖩 鱼 Account	PHI A	> 🆩 鱼 dbo.Categories	Restricted	
		→ 🖩 ● dbo.Customers	Secret	System Name
	·			Environment Name

Overview Lineage

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

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

erwinDoc		TABLEUAU		SQLTechPubs	
erwinDOC		PRESENTATION	N LAYER	SQLTechPubs	
CustDetails	A	Account		bo.Categories	
				bo.Customers	
	•		V		V

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

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



Collapse/Expand ()

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

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



Auto Expand/Autofit (23)

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

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

erwinDoc	TABLEUAU		Oracle
erwinDOC	PRESENTATION LAYER	SQLTechPubs	🐻 TechPubs
🗏 CustDetails 🐥	Account	SQLTechPubs	APPQOSSYS.WLM_CLAS
		→ dbo.Categories	
		🔶 🖩 dbo.Customers	

Export to Image (

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

Export to PDF (

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

Export to Excel

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

Highlighting Lineage Path of a Table

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

erwinDoc	TABLEUAU	SQLTechPubs	Oracle
erwinDOC	PRESENTATION LAYER	SQLTechPubs	📵 TechPubs
🔲 CustDetails		be dbo.Categories	APPQOSSYS.WLM_CLAS
		dbo.Customers	
T	T	T	

Environments that are not part of a lineage path disappear.

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

erwinDoc	TABLEUAU	SQLTechPubs	Oracle
erwinDOC	PRESENTATION LAYER	SQLTechPubs	
🗒 CustDetails	Account	→ III dbo.Categories	
		bo.Customers	
Y		T	

Environment Details

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

Table Details

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

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

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

Extended Properties

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

For more information, on configuring extended properties of an environment, refer to the <u>Environment</u> topic.

Summary

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

Table

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

Viewing Lineage

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

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

By default, dual lineage of the table appears.

 Columns 	Table Properties Ext	ended Properties	Data Lineage	Impact Analysis	Mind Map	Associations	Workflo	w Log Dat	a Quality	Docum,
Dual Forward	Reverse									
Lineage For: SQLTech	$Pubs \to SQLTechPubs \to$		Logical Name	Expanded Logica	I Name Sen	sitivity Indicator	Overview	Lineage	23 🛛	人
							Sumn	nary		•
							Colun	nn Details		•
	_						#	Column		_
										ę
erwinDoc → erwinDOC		TABL	EUAU → PRESENTATION L	AYER	SQLT	echPubs → SQLTechPu	b: 1	Address		self H
III CustDetails		ш А	ccount		III d	bo.Customers				"
CustCity	A	Ω Nu	umber of Records	A	→ 🗘 Ac	ldress	2	City		
- CustName	-		cct Prod Source Id			ty		,		
	۷	¢ Co	od Acct No	V		ompanyName	3	ComapnyN	ame	_
							Techn	ical		•
							Busin	ess		•
							Trans	formations		•
4						,	Exten	ded Properties		•

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

Columns Table Properties Extended Properties Data Lineage Impact Analysis Mind Map Associations	Workflow L	Log Data Quality	Docum .
Dual Forward Reverse			
Lineage For: SQLTechPubs → SQLTechPubs → □ Logical Name □ Expanded Logical Name □ Sensitivity Indicator □	Overview Lin	neage 🖪 🔀 🕻	X 📕 📾
	Summar	гу	•
	Column	Details	•
	# 0	Column	
			<u>e</u>
		A status as	H H
SQLTechPubs SQLTechPubs SqLtechPubs Salesforce TechPubs Salesforce TechPubs M APPQOSSYS.WLM_CLASSIFIER_PLAN Account	1	Address	ő
Address Address Address Type	2	City	
		,	
ContactName SRSLCN MasterRecordId	3	CompanyName	_
			•
	lechnica	ai	
	Busines	s	•
	Transfor	rmations	
	Tanatol		
	Extende	d Properties	•

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

Columns Table Properties Extended Properties Data Lineage Impact Analysis Mind Map	Associations Workflow Log Data Quality Doc	cum 🖡
Dual Forward Reverse		
Lineage For: SQLTechPubs → SQLTechPubs → Logical Name Expanded Logical Name Sen	sitivity Indicator 🗌 Overview Lineage 💽 🔀 🛃	
	Summary	•
	Column Details	•
	# Column	
		Help
U erwinDoc erwinDoC TABLEUAU PRESENTATION LAYER SQLTechPubs SQLTechPubs	1 Address	Self
CustDetails CustDetails QustCity QustCi	2 ComapnyName	
	3 CompanyName	-
	Technical	•
	Business	•
	Transformations	•
۲	Extended Properties	•

Columns Table Properties Extended Properties Data Lineage Impact Analysis Mind Map Dual Forward Reverse	Associations Workflow Log Data Quality Doc	cum ,
Lineage For: SQLTechPubs → SQLTechPubs → Logical Name Expanded Logical Name Sens	itivity Indicator 🗌 Overview Lineage 💽 💥 🛃 📕	
	Summary	1
	Column Details # Column	
		Help
eminDDc eminDDC TABLEUAU - PRESENTATION LAYER SQLTechPubs - SQLTechPubs	1 Address	Self
CustCity p Number of Records ▶ p Address Ç CustCity > p Acct Prod Source 1d > p Company Name Q CustCity > p Acct Prod Source 1d > p Company Name	2 ComapnyName	
Cod Acct No Cod Acct No Cod Acct No Cod Acct No	3 CompanyName	+
	Technical	•
	Business	^
	Transformations	
()	Extended Properties	

Working on Lineage

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

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



Use the following options:

Logical Name

Use this option to view logical names of columns in the lineage.

For example, in the following lineage, column names are replaced with their logical names.

Lineage For: SQLTechPubs \rightarrow SQLTechPubs \rightarrow	Logical Name Expanded Logical Nam	e Sensitivity Indicator
erwinDoc→ erwinDOC	TABLEUAU → PRESENTATION LAYER	SQLTechP
III CustDetails	III Account	💷 dbo.C
CustCity	Noof_Records_Account	▲ → Addres
CustName	Account_Production_Source_ID	City
	Account_Cash_On_Delivery_Currency	→ Coma
V	Cash_On_Delivery_Account	Compa

Expanded Logical Name

Use this option to view expanded logical names of the columns in the lineage.

For example, in the following lineage, column names are replaced with their expanded logical names.

Lineage For: SQLTechPubs \rightarrow SQLTechPubs \rightarrow	Logical Name 📝 Expanded Logical Name) Sensitivity Indicator
$erwinDoc \rightarrow erwinDOC$	TABLEUAU → PRESENTATION LAYER	SQLTec
III CustDetails	III Account	🖽 dbo
CustCity	Noof_Records_Account_Team	→ 🖞 Add
🗘 CustName	Account_Production_Source_Identity	¢ City
	Account_Cash_On_Delivery_Currency	De Con
×	Cash_On_Delivery_Account_Number	Con

Sensitive Data Indicator

Use this option to view sensitivity of columns in the lineage.

For example, the following lineage displays the sensitivity of columns.



Overview Lineage

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

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

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

erwinDoc -> erwinDOC	TABLEUAU -> PRESENTATION LA	SQLTechPubs -> SQLTechPubs	Oracle -> TechPubs
III CustDetails	III Account	III dbo.Customers	APPQOSSYS.WLM_CLASSI
CustName	🗘 🗘 Number of Records	Address	↓ \$ SEQNO
CustCity	Acct Cod Ccy	City	→ TIMESTAMP
	Acct Prod Source Id	CompanyName	→ NCLSRS
Y	Cod Acct No	ContactName	
Y			

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

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

TABLEUAU -> PRESENTATION LA	. SQLTechPubs -> SQLTechPubs	Oracle -> TechPubs
III Account	🗰 dbo.Customers	APPQOSSYS.WLM_CLASSI
Number of Records	Address	▲> ¢ seqno
🕆 Acct Cod Ccy	City	→
P Acct Prod Source Id	> CompanyName	> P NCLSRS
Cod Acct No	ContactName	

Collapse/Expand ()

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

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

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

Auto Expand/Autofit (23)

This switch is enabled when you use the expanded view (). Use this option to switch between the Auto Expand view and Auto Fit view. The Auto Expand view

shrinks the space for the list of columns and the Autofit view expands the space to fit the list of columns.

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



Export to Image (🖾)

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

Export to PDF (

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

Export to Excel

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

Highlighting Lineage Path of a Column

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



Tables that are not part of a lineage path disappear.

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

			Oracle -> TechPubs		Salesforce -> TechPubs
			APPQOSSYS.WLM_C	CLASSI	Account
			P SEQNO		🗘 🕴 Type
			TIMESTAMP	_	→ 🌵 ParentId
			> 0 NCLSRS		🕴 IsDeleted
			> 0 CLPCSTR		MasterRecordId
			¢ ACTIVE		> 🗘 Name
		SQLTechPubs -> SQLTechPubs	> OPER		> 🗘 Id
		dbo.Customers	CHKSUM	T	🕴 🛱 BillingStreet
		🔺 🖣 Address			
		¢ City			
		CompanyName			
		> 🗘 ContactName			
		ContactTitle			
		CustomerID			
		🕈 Region 💌			

Summary

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

Column Details

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

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

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

Technical

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

Business

This pane displays business properties of a table. By default, it displays the business properties of the table for which, you ran lineage analysis. You can click a table in the lineage and view its business properties. The business properties of a table include

Logical Table Name, Table Definition, Expanded Logical Name, and so on. For more information on updating table properties, refer to the <u>Updating Table Properties</u> topic.

Extended Properties

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

Column

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

Viewing Lineage

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

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

By default, dual lineage of the column appears.



To view forward lineage, click the **Forward** tab.



To view reverse lineage of the column, click the Reverse tab.



Working on Lineage

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



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

Use the following options:

Overview Lineage (

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

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

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



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

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

TABLE	EUAU -> PRESENTATION LA		SQLTechPubs -> SQLTechPubs	
III Ad	ccount		dbo.Customers	
† Ac	ct Cod Ccy	─ ○ →	🖞 CompanyName	A 0
				V

Collapse/Expand ()

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

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



Auto Expand/Autofit (23)

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

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



Export to Image (

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

Export to PDF (

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

Export to Excel

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

Highlighting Lineage Path of a Column

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

erwinDoc -> erwinDOC	TABLEUAU -> PRESENTATION LA	SQLTechPubs -> SQLTechPubs	Oracle -> TechPubs	Salesforce -> TechPubs
III CustDetails	Account	dbo.Customers	APPQOSSYS.WLM_CLASSI	III Account
CustCity	→ 🗘 Acct Prod Source Id	🕂 🗘 🗘 🗘 🗘 🖓 CompanyName	→ 0 NCLSRS	→ IsDeleted
CustName 0	Acct Cod Ccy		¢ SRSLCN	
Y	Y	T	T	T
			· · · · · · · · · · · · · · · · · · ·	

Tables that are not part of a lineage path disappear.

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



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

Technical

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

Business

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

Transformations

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

			Transformations	
			Property	Value
			Transformation #1 - 600	
SQLTechPubs -> SQLTechPubs	Oracle -> TechPubs		Transformation #2 - 849	
🖽 dbo.Customers	APPQOSSYS.WLM_CL	SSI		
CompanyName		A		
	SRSLCN			
	¥	V		

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

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

Valid Values

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

Extended Properties

By default, this pane displays the extended properties of the column for which, you ran the lineage analysis. You can click a column in the lineage to view its extended properties in this pane. For more information on configuring extended properties of columns, refer to the Extending Column Properties topic.

Previewing Data

You can preview data at table level using SQL queries. Data previewing capability at table level enables you to view data instantly and profile the data. You can also schedule a data profiling job and view data profiling summary report at the scheduled time.

To preview table data, follow these steps:

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

By default the Data Profiling tab opens.

System Catalogue 🗸		• ^C	olumns	Table Prope	erties	Association	s Mi	nd Map	Data Quality	Docum	ents Exter	nded Properli	ies Index	(es Im	pact An	alysis Forv	rard Lir	1eage Reverse Lineage	Tes ,
Metadata	•	• Da	ta Profilin	g Data Profil	e Statistics	Preview I	Data												,
 BI BO Reports 										Data Profiling	Summary Re	eport Data	a Profiling Pat	tern Summar	/ Report	Profile Da	ta	Dashboard	>
Customer Order Entry Data Lake Data Models		*		Column Name	DQ Score	Column Dataype	Length	Locked?	Job State	Total Rows	Distinct Values	% Distinct Values	Repeated Values	Nulls	% Nulls	Min Value	Max Valu	 DQ Score	•
 EDW erwinDIS 																		,	
Data_Migration (v1.01) doo.ADS_ASSOCIATIONS	ľ	1		D	-	bigint	8	a		0	0	0%	0	0	0%			6 Total Columns	
dbo.ADS_FORM		2		SOURCE_OBJ	-	bigint	8	ð		0	0	0%	0	0	0%				
dbo.ADS_KEY_VALUE		3		SOURCE_OBJ	-	bigint	8	ð		0	0	0%	0	0	0%			0	
dbo.ADS_MM_VERSION		4		TARGET_OBJE	-	bigint	8	a		0	0	0%	0	0	0%			V Profiled Columns	
dbo.ADS_MODULES		5		TARGET_OBJE	_	bigint	8	a		0	0	0%	0	0	0%				
doo.ADS_OBJECT_CODES doo.ADS_OBJECT_TO_OB.	ľ	6		RELATIONSHIP	-	bigint	8	â		0	0	0%	0	0	0%			0	

4. Click the **Preview Data** tab.

The User Credentials page appears. For more information on enforcement of user credentials, refer to the <u>Enforcing Credentials for Data Access or Preview</u> topic.

User Credenti	als		_ 🗆 ×
Note:Validate User	r credentials to proceed	→	×
User Name* :			
Password* :			

5. Enter credentials to connect with the database.

Data at table level can be viewed. You can use SQL Editor to execute a SQL query to preview data.

System Catalogue 🗸		Columns	Table Properties	Associations	Mind Map	Data Quality	Documents	Extended Properties	Indexes	Impact Analysis	Forward Lineage	Reverse Lineage	Tes 🕨
Metadata	•	Data Profiling	Data Profile Stat	istics Preview Data	_								,
BI BO Reports Gustomer Order Entry		ype your SQL Quer	y here									D	
 Data Lake Data Models 		ID		SOURCE_OBJECT_ID		SOURCE_OBJECT	TYPE_ID	TARGET_OBJECT_ID		TARGET_OBJECT_	TYPE_ID	RELATIONSHIP_DETAIL	il_ID
EDW													_
Data_Migration (v1.01)		15		813		28		808		28		1	
dbo.ADS_ASSOCIATIONS dbo.ADS_FORM	i	16		813		28		817		28		1	
dbo.ADS_KEY_VALUE		7		813		28		823		28		1	
dbo.ADS_KEY_VALUE_OBJ	1	8		813		28		825		28		1	
dbo.ADS_MM_VERSION		19		813		28		827		28		1	
dbo.ADS_OBJECT_CODES	1	20		813		28		828		28		1	
	1	21		9		36		3		35		7	

You can also profile data at table level and provide data quality score.

Profiling Data at Table Level

You can assess your data quality by profiling the data at table level. You need to schedule a data profiling job and provide the data quality score by assessing the data quality.

To profile data 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 Data Quality.

By default the Data Profiling tab opens.

System Catalogue	<	• C	olumns	Table Prop	erties	Association	ns Mi	ind Map	Data Quality	Docum	ients Exter	nded Properti	es Index	xes Imj	pact An	alysis For	ward Lir	neage Reverse Lineage	Tes 🖡
Metadata	*	↓ Dat	ta Profilin	ı g Data Profil	le Statistics	Preview	Data												,
 BI BO Reports 									-	Data Profiling) Summary Re	eport Data	a Profiling Pat	tern Summan	y Report	Profile Da	ata	Dashboard	>
 Customer Order Entry Data Lake Data Models 		+		Column Name	DQ Score	Column Dataype	Length	Locked?	Job State	Total Rows	Distinct Values	% Distinct Values	Repeated Values	Nulls	% Nulls	Min Value	Max Valu	 DQ Score	^
▶ ■EDW ▲ ■erwinDIS																			
Data_Migration (v1.01)		1		ID	-	bigint	8	a		0	0	0%	0	0	0%			6 Total Columns	
dbo.ADS_FORM		2		SOURCE_OBJ	-	bigint	8	a		0	0	0%	0	0	0%				
dbo.ADS_KEY_VALUE		3		SOURCE_OBJ	-	bigint	8	ð		0	0	0%	0	0	0%			0	
dbo.ADS_MM_VERSION		4		TARGET_OBJE	-	bigint	8	a		0	0	0%	0	0	0%			U Profiled Columns	
dbo.ADS_MODULES		5		TARGET_OBJE	_	bigint	8	6		0	0	0%	0	0	0%				
dbo.ADS_OBJECT_CODES dbo.ADS_OBJECT_TO_OB.		6		RELATIONSHIP	-	bigint	8	a		0	0	0%	0	0	0%				

- 4. Select columns.
- 5. Click the **Profile Data** button.

The User Credentials page appears. For more information on enforcement of user credentials, refer to the Enforcing Credentials for Data Access or Preview topic.

🔲 User Credentie	als		_ 🗆 ×
Note:Validate User	r credentials to proceed	→	×
User Name* :			
Password* :			

6. Enter credentials to connect with the database.

The Job Scheduler page appears.

Job Scheduler		- 0
		Schedule Cancel
Job Name* :	Administrator1571918485354	
Interval :	Once	•
Schedule Job On* :	10-24-2019 17:31	
	🔘 Local 💿 Server	
Data Profile Prefere	ences	
🗹 Total Values	🗹 Minimum Value	Most Frequent Patterns
☑ Distinct Values	🗹 Maximum Value	Least Frequent Patterns
Repeated Values	Most Frequent Value	
🗹 Null Values	🗹 Least Frequent Value	
Notify Me :	ON	
Notification Email :	abc@abc.com	
CC List :		
Note* - Please provide	CC List with commal 1 separ	ted volues

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

Option	Description
	Specifies the job name.
Job Name	For example, Administrator1585030550001.
	This field autopopulates with a job name. You can edit it and enter a dif-

Option	Description
	ferent job name.
Interval	Specifies the frequency of the job.
	For example, Every Week.
Scheduled	Set the date and time of the job using 🥅.
Job On	For example, 03-24-2020 11:45.
	Select whether the job uses local or server time.
Local or Server	 Local: Refers to your local machine.
	 Server: Refers to the machine where your application is deployed.
	Select the corresponding check boxes to give your data profile pref- erences in the profile grid report.
	 Total Values: Select the check box to display the total number of rows in the selected columns.
	 Distinct Values: Select the check box to display the number of dis- tinct values in the selected columns.
	 Repeated Values: Select the check box to display the number of repeated values in the selected columns.
Data Profile	 Null Values: Select the check box to display the number of null values in the selected columns.
Preferences	 Minimum Value: Select the check box to display the minimum value in the selected columns. You can enable or disable analysis of minimum value for character data. For more information on this, refer to the <u>Configuring Data Profiling and DQ Scores</u> topic.
	 Maximum Value: Select the check box to display the maximum value in the selected columns. For more information on this, refer to the <u>Configuring Data Profiling and DQ Scores</u> topic.
	 Most Frequent Value: Select the check box to display the most fre- quent values in the selected columns.
	• Least Frequent Value: Select the check box to display the least fre-

Option	Description
	quent values in the selected columns.
	 Most Frequent Patterns: Select the check box to display the most frequent patterns in the selected columns. For more information on this, refer to the <u>Configuring Data Profiling and DQ Scores</u> topic.
	Least Frequent Patterns: Select the check box to display the least
	frequent patterns in the selected columns. For more information
	on this, refer to the <u>Configuring Data Profiling and DQ Scores</u>
	topic.
	Switch Notify Me to ON to receive email notification.
Notify Me	For more information on email notification, refer to the <u>Configuring Noti</u> - fication on Profiling Data topic.
	This field is autopopulated with your email ID.
Notification Email	If you enable notifications in the <u>Metadata Manager Settings</u> , you can receive email notifications from the <u>administrator's email ID</u> about the scheduled job.
	Enter a comma-separated list of email IDs that should receive email noti-
CC list	fications about the scheduled job.
	For example, ab.dav@xyz.com, cal.kai@xyz.com

8. Click Schedule.

The data profiling job is scheduled.

The data profiling job is completed at the scheduled time and the job state changes to **COMPLETED**.

4	Columns	Table Prop	erties	Association	ns Mir	nd Map	Data Quality	Docum	ents Exter	nded Properti	es Inde	ces Im	pact An	alysis Fo	ward Li	neage Reverse Lineage	Tes 🕨
•	Data Profiling Data Profile Statistics Preview Data														•		
	Data Profiling Summary Report Data Profiling Pattern Summary Report Profile Data														ata	Dashboard	>
#		Column	DQ	Column	Length	Locked?	Job State	Total Rows	Distinct	% Distinct	Repeated	Nulls	%	Min Value	Max		
		Nume	score	balaype					values	vulues	vulues		INOUS		valu	DQ Score	
1		ID	_	bigint	8	a	COMPLETED	60	60	100%	0	0	0%	15	1	6 Total Columns	
2	2	SOURCE_OBJ	_	bigint	8	a	COMPLETED	60	11	18%	8	0	0%	5	1	rotal colorinis	
3	3	SOURCE_OBJ	_	bigint	8	a	COMPLETED	60	2	3%	2	0	0%	28		,	- 1
4	ŧ 🔲	TARGET_OBJE	_	bigint	8	a	COMPLETED	60	47	78%	12	0	0%	1	19	6 Profiled Columns	
ε		TARGET_OBJE	_	bigint	8	ð	COMPLETED	60	5	8%	4	0	0%	2			
ė		RELATIONSHIP	_	bigint	8	ð	COMPLETED	60	6	10%	5	0	0%	1			_

9. Use the following options:

Data Profiling Summary Report

To view data profiling summary, click Data Profiling Summary Report.

Data Profiling Summary page appears.

ata Profiling Sur	mmary													
													Expor	t: 🔊 🔁
						Dat	a Profiling S	ummary						
										,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,				
	215		1		2410		6	60		60		0	12	
	TOTAL TABLE	s	PROFILED TABLES	то	TAL COLUM	NS C	ROFILED	TOTAL R	ows	UNIQUE VALU	JES	NULLS	REPEATED VALUES	
lbo.ADS_ASSOCI#	ATIONS													
Column Name		DQ Score	Column Type	Length	Total Rows	Distinct Values	% Distinct Values	Repeated Values	Nulls	% Nulls	Min Value	Max Value	Most Frequent	Least Frequent
ID			bigint	8	60	60	100.0%	0	0	0.0%	15	234	15	15
SOURCE_OBJECT_	ID		bigint	S	60	11	18.0%	8	0	0.0%	5	1017	9	137
SOURCE_OBJECT_	TYPE_ID		bigint	S	60	2	3.0%	2	0	0.0%	28	36	28	36
TARGET_OBJECT_	ID		bigint	S	60	47	78.0%	12	0	0.0%	1	193871	2	\$17
farget_object_	TYPE_ID		bigint	8	60	5	\$.0%	4	0	0.0%	2	36	28	2
	ETAIL_ID		bigint	8	60	6	10.0%	5	0	0.0%	1	7	1	5

Data Profiling Pattern Summary

To view data profiling pattern summary report, click **Data Profiling Pattern Summary Report**. The Data Profiling Pattern Summary page appears.

Data Profiling Patterns Summary		×
Exp	ort: 🔊 🔁 🕙 🖭 📾	-
Data Profiling Pattern Summary		
D		
Most Frequent Patterns		
Pattern	Count	
NNN	39	
NN	21	
Least Frequent Patterns		
Pattern	Count	
NN	21	
NNN	39	
SOURCE_OBJECT_ID		
Most Frequent Patterns		
Pattern	Count	
NNN	28	
N	21	
NNNN	8	
NN	3	
Least Frequent Patterns		
Pattern	Count	
NN	3	
NNNN	8	
N	21	
NNN	28	-

Data Profile Statistics

To view data profile statistics, click **Data Profile Statistics**.

The data profile statistics appears in a bar graph.



Click **DQ Score**.

The Update DQ Score page appears.

🔲 Update DQ Score		_ 🗆 ×
	Save	Cancel
DQ Score	Select DQ Score	•

Select **DQ Score** and click **Save**. The DQ Score is updated.

Viewing Mind Maps

A mind map displays the pictorial representation of a technical asset and its association with other business and technical assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and other business assets as defined in the Business Glossary Manager Settings.

You can see Mind Maps in different views:

- Logical View
- Conceptual View

You can select an asset on a mind map and view its properties, association statistics, and sensitivity under the Object Properties pane.

To view mind maps, follow these steps.

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the System Catalogue pane, click a <Technical_Asset>.
- 3. In the right pane, click the **Mind Map** tab.

Mind map page appears.

For example, if you click an environment in the System Catalogue pane and then click the Mind Map tab, the mind map of the environment appears.

4. From the Mind Map page, you can switch click **Logical View** or **Conceptual View** to switch between them.

For more information on views, see the list below:

Logical View

Displays the associated technical assets on the left side and associated business assets on the right of the business asset. Also, view Mind Map properties on the

right-hand side pane.

Mind Map	
CUSTOMER	Logical View Conceptual View
	Legend C Environment (Tables Columns (Business Term Business Policy (Tags
	View My Preferences
	Object Properties
EN CUSTOMER (32) Customer Master Catalog	CUSTOMER
	Object Path Customer Mast
	Object Type Business Term

Conceptual View

Displays the associated technical assets in non-hierarchical representation. Also, view the Mind Map properties on the right-hand side pane.



5. Use the following options to work on the mind map:

Reload Diagram (^C)

Use this option to reload the mind map.

Expand Diagram ($\hat{\cdot}$)

Use this option to expand the mind map to view the associated technical and business assets.

Reset Diagram to Original View (X)

Use this option to collapse the expanded nodes and restore the mind map to its original form.

Export (土)

Use this option to export the mind map. Hover over **Export** and use the following options:

Mind Map - Excel Report: Use this option to download the mind map in the .xlsx format. Ensure that you expand the mind map before downloading the report.

Mind Map - Image: Use this option to download the mind map as an image, in .jpg format. Ensure that you expand the mind map before downloading the mind map image.

Sensitivity Details - Excel Report: Use this option to download the sensitivity report of all associated assets in the .xlsx format. This report includes sensitive data indicator (SDI), SDI classification, and SDI description of the associated assets.

Legends

Use the legends to identify the list of components in a mind map.



View My Preferences

You can set your preferences to view the mind map as per your requirements. To set your preferences, expand the **View My Preferences** pane and use the following options:

Asset Hierarchy Background

Select the **Gray Background** check box to display gray colored background for the asset hierarchy nodes. For example, the following mind map displays the hierarchy nodes with a gray colored background.



Relationship Options

Use the following options to configure relationship options:

Include Relationships:

Select the check box to display relationships between the assets on the mind map.

• Switch to Enterprise Relationship configuration:

Select the check box to apply the selected line color and type configured in the Business Glossary Manager Settings.

For example, in the following mind map, the relationships (is a Synonym of and is Parent Of) and the line color as set in Business Glossary Manager Settings appear on the mind map.



View Logical Names

Use the following options to view logical and expanded logical names of tables and columns on the mind map:

Logical Names:

Select the check box to view logical names of tables and columns on the mind map.

Expanded Logical Names:

Select the check box to view expanded logical names of tables and columns on the mind map.

You can configure logical names and expanded logical names of <u>tables</u> and <u>columns</u> in Metadata Manager.

For example, the following mind map displays logical names and expanded

logical names.

	dbo.ADS_FORM Logical Name: ADS_FORM ELN: Admission_Form
	Atlas Sales System Atlas Sales System Sin Associated with Atlas Sales System Atlas Sales Atlas Sales System Atlas Sales Atlas Atlas Atlas Sales Atlas Attas A
F_ID Logical Name: F_ID ELN: Feature_Identity	dbo.ADS_FORM ← erwinDIS ← erwinDIS ← C
is associated v	with

View Sensitivity

Use the following options to view sensitivity details of the assets on the mind map:

Sensitivity Data Indicator(Y/N):

Select the check box to view the sensitive assets on the mind map.

Sensitive Data Classification:

Select the check box to view the sensitive data classification of the assets on the mind map.

For example, the following mind map displays the sensitive data indicator as sensitive (

For more information on updating sensitivity of assets in a mind map, refer to the <u>Updating Sensitivity</u> topic.

Confidential dbo.ADS_FORM Logical Name: ADS_FORM EXA Advision_Form EXA Advision_Form associated with	Is associated witConf. NSDQ OPT 3 APPY 44950	
Confidential Atlas Sales System Atlas Sales System E Confidential F_ID	Confidenial Srd Party Preference Option Code BT Business and Management	
Logical Name: F_ID	is asspated witConde	

Filter

To filter the components of mind map, expand the **Filter** pane and use the following options:

By Asset Type:

Use this option to filter in the required asset types in the mind map

By Relationship:

Use this option to filter in the required assets in the mind map based on relationship.

For example, if you select only Column for By Asset Type and is associated with for By Relationship, then only associated columns with is associated with relationship are shown in the mind map.

F_ID Logical Name: F_ID ELN: Feature_Identity	dbo.ADS_FORM	< erwi	nDIS ←	erwinDIS	←	с (3rd Party Preference Option Code
is associated with							

Object Properties

Click an asset on mind map and view its properties with association statistics and sensitivity. Asset properties differ for technical and business assets.

Overview

Expand this pane to open a pan view of the mind map. You can slide the purple box to navigate across the mind map.



Configuring Extended Properties

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

You can configure extended properties at System level for three objects:

- **Environments**: Extended properties configured at system level for environments are applicable to all the environments under the system.
- **Tables** : Extended properties configured at system level for tables are applicable to all the tables under the system.
- Columns: Extended properties configured at system level for columns are applicable to all the columns under the system.

To configure extended properties at system level, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, click the required system.
- 3. Click the **Configure Extended Properties** tab.

4	Data Dictionar	Data Dictionary System Details		System Details Associations			System Details Associations Mind Map System Documents			Extended Properties	Configure Extended Properties			Scheduled Jobs	
	Environment	Table	Column												
	Edit Delete														
Fi	eld Controls														
		Τ	T	E	0		Т		(11)	7					
	Group	Text Box	Combo Box	List	Radio	Check Box N	lumbe	r Boolean	Date Picker	Category	Rich Edito	r			
-															
C	onfigure form														

The Configure Extended Properties tab contains the following sections:

- Field Controls: Use this pane to get the required UI elements.
- Configure Form: Use this pane to design forms using the available UI elements in the Field Controls pane.

- **Properties**: Use this pane to view the properties of the UI element selected in the **Configure Form** pane.
- 4. Use the following tabs:

Environment

Use this tab to configure extended properties for environments under the selected system.

Table

Use this tab to configure extended properties for tables under the selected system.

Column

Use this tab to configure extended properties for columns under the selected system.

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

Data Dictiona	ry System	Details Ex	tended Properties	Associations	New Mind Map	Data Lin	eage	System Documents	Configure Extended Properties	Scheduled Jobs
Environment	labie	Column								
Field Controls										
Group	Text Box	Combo Box	List	O Radio	Check Box	Numb	er	Boolean D	itate Picker Category	
Configure Form							Propert	ies		
		Submitted I	By				Prope	rty		Value
							Publish	ed		
		Locati	on				Field			Submitted By
							Туре			Text Box
							Mandat	ory		OFF
							Regular	Expression		
							Descrip	tion		
							Visible	in Extended Properti	es	
							Order			1

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

Property	Description					
Published	Switch Published to ON to publish the field.					
	Specifies the field label.					
Field	To change the field labels, double-click the corresponding Value cell.					
	For example, Metadata Scanned On.					
Tuno	Specifies the type of the field.					
туре	To select field types, double-click the corresponding Value cell.					
Dependencies	Defines the pick list fields that can be used as controlling fields. It works only with the Reference Data Manager connector.					
	To define pick list fields, select the fields from the drop down option.					
	Specifies the connectors for the field.					
	To configure option values, click Configure Values .					
	Use the following options:					
Configure Values	 Default connector: Use this option to enter option values manually or using an XLSX file. 					
	 <u>Reference Data Manager</u>: Use this option to pull option values from reference tables in the Reference Data Manager. 					
Mandatory	Specifies whether the field is mandatory.					
	Specifies the field description.					
Description	To enter field descriptions, double-click the corresponding Value cell.					
Visible in Exten-	Switch Visible in Extended Properties to ON to make it visible on					
ded Properties	the Extended Properties tab.					
	Specifies the order of the field on the Extended Properties tab.					
Order	To enter the order number, double-click the corresponding Value cell.					

Refer to the following table for property descriptions:

Property	Description
	You can also drag and move fields in the Configure Form pane to
	change their order.

7. Click Save.

The form is saved, and is available on the Extended Properties tab of the selected object (Environment, Table, or Column).

To use the form, follow these steps:

- 1. In the **System Catalogue** pane, click the required object (Environment, Table, or Column).
- 2. Click the Extended Properties tab.

DATA INTELLIGENCE SUITE Metadata M	lanager				t Search	۹	¢ 0 🖻	8	
System Catalogue 🗸	Statistics							^	
Sensitive Data	1 Total Tables	0 Tables With Logical Expanded Names	6 Total Columns	0/6 Columns With Logical Expanded Names	1/6 Total Primary Key Columns	0/6 Total Foreign Key Columns		<	
Sample (v1.00)	Quality Documer	nts Impact as Source	Impact as Target Ex	lended Properties Sched	uled Jobs Configure E	xtended Properties	Workflow Log	•	
AdventureWorks	Configure Edit De	lete				Import From Exc	el Export To Exc	cel	
Atlas Sales System	Form Values								
			First A	Select an option	I			~	
	Final Approval Select an option								

- 3. Click **Edit** and use the form.
- 4. Click Save.

The form is saved.

You can download the extended properties in the XLSX format and use it as a template to <u>import extended properties</u>. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.

You can also configure extended properties specific to:

- Systems
- Environments
- Tables
- Columns

Default Connector

When you configure extended properties using UI elements, such as combo box, radio, and list you require some option values. You can use default connector to import option values from an MS Excel file or enter them manually.

To use default connector, follow these steps:

1. On the **Connectors** page, click **Next**.

The <UI_Element> Options page appears. For example, if the UI element is Combo Box, the Combo Box Options page appears.

Combo Box Options		- 🗆 ×
Add Save Delete Import Excel		
Text	Value	

2. Use the following options:

Add

Use this option to enter text and value manually. The Text corresponds to options whereas the Value corresponds to underlying value of an option.

Import Excel

Use this option to import options from MS Excel files.

To import MS Excel files, follow these steps:

1. Click Import Excel.

The Upload Excel page appears.

Upload Excel	- ¤ ×
Attach Excel File Choose File No file chosen	
ί ×	
Note [*] : 1. Empty FIELD pairs are ignored.	
2. Duplicate FIELD pairs are ignored.	
Slash(/) FIELD pairs are ignored.	
4. FIELD pair with more than 200 characters are ignored.	•

2. Click **Choose File** and select the required MS Excel file.

The Upload Excel page appears. It displays the data in the MS Excel file.

Upload Excel						
#	GROUP NAME	ROLE NAME	USER ID	USER NAME	USER EMAIL	BUSINESS ASSET
#	Select Column To Import		Select Column To Import			
1	Data Stewards	Data Steward_GER	mmannigan	Mike Mannigan	mmannigan@xyz.com	CUSTOMER
2	Data Stewards	Data Steward_GER	mmenza	Mike Menza	mmenza@xyz.com	TestTaskList
3	Data Stewards	Data Steward_GER	mmannigan	Mike Mannigan	mmannigan@xyz.com	TestTaskList

3. Double-click the Select Column To Import cell for the required column.

The available options appear.

1 ×			
#	GROUP NAME	ROLE NAME	USER ID
#	Select Column To Import	Select Column To Import	Select Column To Import
		VALUE	
1	Data Stewards	Clear Selection	mmannigan

4. Select the appropriate option.

The Field corresponds to options and Value corresponds to the underlying value of an option. You can import multiple columns and use Clear Selection to undo the selection.

5. Click 1.

The Options page appears. It displays the imported columns. You can delete a row that is not required. To delete rows, click a row and then click **Delete**.

Combo Box Options	_ □ ×
Add Save Delete Import Excel	
Text	Value
Data Steward_GER	mmannigan
Data Steward_UK	rcooper
Data Owner_GER	esimpson
Data Owner_RO	ksridhar
Tech Data Steward_GER	jadams 👻

6. Click Save.

The options appear for the UI element under the Configure Form section.

Combo Box	Select an option
	Data Steward_GER
	Data Steward_UK
	Data Owner_GER
List	Data Owner_RO
	Tech Data Steward_GER
	Mapping Admin
	ETL Developer
	Mapping Designer

Reference Data Manager

When you configure extended properties using UI elements, such as combo box, radio, and list you require some option values. You can use the Reference Data Manager connector to import option values from tables in the Reference Data Manager.

To use reference data manager connector, follow these steps:

1. On the Connectors page, click Reference Data Manager.

The Reference Data Manager page appears. It displays the reference folders in the Connector View pane.



2. In the **Connector View** pane, click a reference table.

The Parameters pane displays the columns in the reference table. You can also click Preview to view the data in the reference table.

Reference Data Manager						- ¤ ×
					Back	Finish
Connector View <	Parameters					>
E- # Reference Folders				Rese	Field	
🖨 🎝 erwin Sales	СІТҮ		Select		• 0	
⊨ 🗞 Reference Tables	CITY_NAME		Select		• 0	
⊕- TECHPUBS_TEAM(1.00)						
⊕- Ⅲ T_NAME(1.00)						
BALES_REF_DATA(1.00)						
⊞- ⊞ HR_REF_TABLE(1.00)						
	·					
Preview Data						*
				Records 10	•	Preview
# CITY		CITY_NAME				

- In the Parameters pane, click the Field button for the required column.
 You can also select the controlling field from the drop down option.
- 4. Click Finish.

The Extended Properties Configuration page appears.

Extended Properties Configuration			_ = ×
Save Cancel Delete			
Field Controls			
Group Text Box Combo Box	List Radio Check Box	Number Boolean Date Picker	jory v
Configure Form		Properties	
Selected Koles Group	Compliance Unicer	Property Value	
	Mumbai Los Angeles	. Description	•
List of Cities	New Delhi	Load On Startup	
Radio		Visible in Extended Properties ON	

- 5. Under the **Properties** section, switch **Load on Startup** to **ON**.
- 6. Click Save.

The option values are configured.

Configure Form	
Governance Responsibilities	Compliance Officer
Selected Roles Group	Compliance Officer
List of Cities	Mumbai Los Angeles New Delhi
Selected City	Los Angeles

Importing from Excel

You can import user-defined properties for the technical assets from a XLSX file. You can either use an existing XLSX file or download an extended properties file from a project. Ensure that the XLSX file follows the correct template.

To import extended properties from XLSX files, follow these steps:

1. On the Extended Properties tab, click Import From Excel.

The Upload Excel page appears.

Upload Excel	<u> </u>
Attach Excel File Choose File No file chosen	
1 ×	

- 2. Click Choose File.
- 3. Browse and select the XLSX file.
- 4. Click **1**.

The Upload Excel page appears. It displays the data in the XLSX file.

Upload Excel						
#	FIELD	VALUE	TYPE	PARENTFIELD	CREATED_BY	CREATED_DATE_TIME
#	Select Column To Import					
1	Data Stewards		Combo Box			
2	Data Steward_UK	Data Steward_UK	Text Box	/Data Stewards	Administrator	10/20/2020 06:42:38
3	Data Steward_GER	Data Steward_GER	Text Box	/Data Stewards		
4	Data Owners	Data Owner_GER	Text Box		Administrator	10/20/2020 06:42:38

5. Double-click the Select Column To Import cell for the required column.

The available options appear.

Upload Excel				
1				
#	FIELD	VALUE	[≜] TYPE	PARENTFIELD
#	Select Column To Import FIELD	Select Column To Import	Select Column To Imp	oort Select Column To Import
1	VALUE TYPE PARENTFIELD		Combo Box	
2	Data Steward_UK	Data Steward_UK	Text Box	/Data Stewards
3	Data Steward_GER	Data Steward_GER	Text Box	/Data Stewards

6. Select the appropriate option.

You need to import the Field, Value, Type, and PARENTFIELD columns.

7. Click 🛍.

The extended properties are uploaded.

System

You can configure extended properties specific to a system.

To configure system specific extended properties, follow these steps:

- 1. In the **System Catalogue** pane, click a system.
- 2. Click the **Extended Properties** tab.

DATA INTELLIGENCE SUITE Metadata Manager										
System Catalogue 🗸	Data Dictionary System Details Extended Properties Data Lineage	Mind Map Associations								
🔒 Sensitive Data 🛛 New	Configure Edit Delete									
🔺 📰 Metadata	Form Values									
 erwin DI Suite 		No Data Found								
erwin DM										
erwinDISPoC										
Informatica										

3. Click Configure.

Extended Proper	rties Configuro	rtion									_ 🗆 ×
Edit Delete											
Field Controls											
Group	Text Box	Combo Box	List	O Radio	Check Box	T Number	Boolean	Date Picker	Category	To Rich Editor	•
											•
Configure Form											

The Extended Properties Configuration page contains the following sections:

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

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

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

You can download the extended properties in the XLSX format and use it as a template to <u>import extended properties</u>. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.

Environment

You can configure extended properties specific to an environment.

To configure environment specific extended properties, follow these steps:

- 1. In the **System Catalogue** pane, click an environment.
- 2. Click the Extended Properties tab.

System Catalogue 😽	٢	Statistics				
🔒 Sensitive Data		717	0	7369	0/7369 Columns With Expanded	
🔺 🗐 Metadata		Total Tables	Tables With Expanded	Total Columns		
Informatica			Logical Names		Logical Names	
MS Excel		Data Dictionary En	vironment Details Extended	Properties Data Lineage	Impact as Source Impa	
New						
Image: A constraint of the second						
TechPubs (v1.00)		Form Values				
					No Data Found	

3. Click Configure.

Extended Pro	perties Configu	ration									_ 🗆 X
Edit Delete											
Field Controls											
Group	Text Box	Combo Box	List	O Radio	Check Box	Number	Boolean	Date Picker	V Category	To Rich Editor	*
											w
Configure Form											

The Extended Properties Configuration page contains the following sections:

- Field Controls: Use this pane to get the required UI elements.
- Configure Form: Use this pane to design forms using the available UI elements in the Field Controls pane.

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

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

You can download the extended properties in the XLSX format and use it as a template to <u>import extended properties</u>. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.
Table

You can configure extended properties specific to a table.

To configure table specific extended properties, follow these steps:

- 1. In the **System Catalogue** pane, click a table.
- 2. Click the **Extended Properties** tab.



3. Click Configure.

Extended Properties Configuration		_ _ ×
Edit Delete		
Field Controls		
Group Text Box Combo Box List	Radio Check Box Number Boolea	an Date Picker Category Rich Editor
Configure Form		

The Extended Properties Configuration page contains the following sections:

- Field Controls: Use this pane to get the required UI elements.
- Configure Form: Use this pane to design forms using the available UI elements in the Field Controls pane.

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

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

You can download the extended properties in the XLSX format and use it as a template to <u>import extended properties</u>. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.

Column

You can configure and use extended properties specific to a column.

To configure column specific extended properties, follow these steps:

- 1. In the System Catalogue pane, click a column.
- 2. Click the Extended Properties tab.



3. Click Configure.

Extended Properties Configuration		_ _ ×
Edit Delete		
Field Controls		
Group Text Box Combo Box List	Radio Check Box Number Box	olean Date Picker Category Rich Editor
Configure Form		

The Extended Properties Configuration page contains the following sections:

- Field Controls: Use this pane to get the required UI elements.
- Configure Form: Use this pane to design forms using the available UI elements in the Field Controls pane.

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

The form is saved under the Extended Properties tab.

You can download the extended properties in the XLSX format and use it as a template to <u>import extended properties</u>. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.

Creating and Managing Test Cases for Tables

You can define test cases for a table in the Metadata Manager and determine the testing type, expected and actual results, SQL script, and more. You can also enrich a test case by adding validation steps and supporting documents to it.

The metadata-level test cases are stored in the Test Manager under a project. This project follows the <System_Name>_<Environment_Name> nomenclature format.

Creating and managing test cases involves:

- Creating test cases
- Adding validation steps
- Adding documents
- Managing test cases

Creating Test Cases

In the Metadata Manager, you can define test cases for tables. You can also add documents and multiple validation steps to the test cases.

To create table-level test cases, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, expand a system, and click a table.
- 3. Click the Test Specification tab.

DATA INTELLIGENCE SUITE Metadata A	∆anag	er				🏚 Searc	h Q	* 08
System Catalogue 🛛 🗶	Inn	s Tab	le Properties	Data Quality Docum	nents Extended Proper	ies Forward Lineage	Reverse Lineage Tes	t Specification
🔒 Sensitive Data 🔺	Ŧ	♠ ⊕						×1 ×
Metadata								
 iiii 3rd Party Flat Files 	#	Test Case	e Test Case	Test Case Label	Type of Testing	Description	Created By	Created Date
A_System		Id	Name					
A_Environment (v1.01)								
dbo.CAT_DIALOG_PROFILE								
dbo.CAT_DIALOG_TAB								
dbo.CAT_TABS								
dbo.CAT_TEMPLATE_OPTIO								
dbo.CAT_TEMPLATE_VERSIC								
dbo.CAT_TEMPLATES								
dbo.CATFX_CAT_COMPON								
dbo.CATFX_DIALOG_COM								
dbo.CATFX_PROFILE_COM								
dbo.CATEX_SCRIPT								

4. Click ⊕.

The Add New Test Case page appears.



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

Field Name	Description					
Test Case	Specifies the name of the test case.					
Name	For example, Verifying Log in Page.					
Test Case	Specifies the unique label for the test case.					
Label	For example, Log in Page.					
Type of Test-	Specifies the type of testing.					
ing	For example, PERFORMANCE-TEST.					
Test SQL	Specifies the SQL script required in the test execution.					
Script	For example, select * from dbo.RM_Resource.					
	Specifies the test objective in brief.					
Description	For example: The objective of the test case is to verify log in page with a					
	valid user name and password.					
Expected	Specifies the expected result of the test case in detail.					
Result	For example: All the users can log on to erwin DI Suite with their user					
	name and password.					
Actual Res-	Specifies the actual test result after the execution of the test.					
ult	For example: One user cannot log on to erwin DI Suite.					
Tosting Com	Specifies the testing comments about the test case.					
ments	For example: The user name and passwords are saved in the dbo.RM_					
ments	Resource table.					

6. Click Save and Exit.

The test case is created.

Once the test case is created, you can enrich it further by:

- Adding validation steps
- Adding documents

Managing test cases involves:

- Updating test cases
- Exporting test cases
- Deleting test cases

Adding Validation Steps

In Metadata Manager, you can add multiple validation steps to a table. You can also specify actual and expected results for each validation step.

To add validation steps to table-level test cases, follow these steps:

1. In System Catalogue, click a table, and click the Test Specification tab.

The Test Case Overview appears in the bottom pane.

DATA INTELLIGENCE SUITE Metadata M	anage						🏚 Sea	rch	۹ ا	\$ 0 B
System Catalogue 🖌	Iity	Docu	ments Exte	nded Properties I	ndexes Impact Ar	alysis Forward Lineage	Reverse Linea	je Test Specifi	cation Wor	rkflow Log
Sensitive Data	€	⊕ ⊕								街 🗙
Gill Srd Party Flat Files Gill A_System	#	lest Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Created By	Created Date	Modified By	Modified Date
 A_Environment (v1.01) dbo.CAT_DIALOG_PROFILE 										
dbo.CAT_DIALOG_TA8 dbo.CAT_TA85 dbo.CAT_TEMPLATE_OPTIO dbo.CAT_TEMPLATE_VERSIC dbo.CAT_TEMPLATEs dbo.CATFX_CAT_COMPON	1 1	D	T_Name	Test_Case_Label	Source to Target Testi		Administrator	2019-10-25 11:31	Administrator	2019-10-25 11:39
dbo.CATFX_DIALOG_COM				I< <	Records from 1 to 1	> >I 🌔 Page 1 🖡	25 rows p	er page 🖕		
dbo.CATFX_SCRIPT	•	Test Case	e Overview	Validation Ste	ps Document	Upload	Ď			•
dbo.CATFX_WORKFLOW_C	Test	Case Id	10)]					
dbo.CHAT_THREAD dbo.CHAT_THREAD_OBJEC	Test	Case Nai	me* T_	Name						
dbo.CHAT_THREAD_USER dbo.CHAT_USER_MESSAGE	Test	Case Lab	oel Te	est_Case_Label						
	Туре	of Testin	g Sc	ource to Target Testing	9					•

2. In the bottom pane, click the Validation Steps tab.

DATA INTELLIGENCE SUITE Metadata N	∆anag	er					🌲 Sea	irch	٩ :	¢ 0 8
System Catalogue 🗸	↓ lify	Doci	uments Exte	ended Properties	ndexes Impact A	nalysis Forward Linea	ige Reverse Linea	ge Test Specif	ication Wo	orkflow Log
Sensitive Data	€	•								🕷 🗙
Garty Flat Files Garty State	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Created By	Created Date	Modified By	Modified Date
 A_Environment (v1.01) dbo.CAT_DIALOG_PROFILE 										
dbo.CAT_DIALOG_TAB dbo.CAT_TABS dbo.CAT_TEMPLATE_OPTIO dbo.CAT_TEMPLATE_VERSIC dbo.CAT_TEMPLATE_VERSIC	1	10	T_Name	Test_Case_Label	Source to Target Tes	n	Administrator	2019-10-25 11:3	Administrator	2019-10-25 11:39
dbo.CATFX_CAT_COMPON				< <	Records from 1 to 1	> >I 🜔 Page	1 • 25 rows p	er page 🖕		
dbo.CATFX_SCRIPT dbo.CATFX_WORKFLOW dbo.CATFX_WORKFLOW_C dbo.CATFX_WORKFLOW_C	•	Test Cas	e Overview	Validation Ste	ps Documen	t Upload				ŀ
dbo.CATA_WOARLOW_C dbo.CATA_MESSAGES dbo.CHAT_MESSAGES dbo.CHAT_IHEAD_OBJEC dbo.CHAT_IHEAD_USER	#	S	tep Name	Step Type	Descrip	stion Creat	ed By	Created Date	Moc	dified By
				IK K NO	Records Found	> >I 🜔 Page	e 1 🔹 📃 25 rows p	erpage 🖕		

3. Click •.

The Add New Test Step page appears.

🗖 Add New Test Step											×
								Save	Cancel)	^
Step Name*]	
Validation Step Type	Select								-		
Description	Tr 🔺	H	в 1	U	≣ ≣	∃ ∎	±⊒ 1 ⊒	*≣ *≊	∎ ∢		
									•		
Expected Result	<u>ک</u> ک	H	в 1	Ū	≣ ≣	≡∎	§≡ i ⊟	*≣ *≣	≣ ∢		l
									•		ļ
Actual Result	► A	H	в 1	Ū	≣ ≣	∃ ∎	4⊒ 1 ⊒	*≣ *	≣ ∢		
									^		•

4. 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
Validation Step	Select the validation step type from the drop-down.
Туре	
Step Name	Enter an unique name of each step.
Description	Describe the object in brief.
Expected Res-	Enter the SQL script to run the test case
ult	
Actual Result	Enter the actual test result after the execution of the test.
Expected Res-	Enter the expected result in detail, including the error-message that
ult	is displayed on screen.
Test Step Com-	Enter relevant test sten comments
ments	

5. Click Save.

The validation step is added to the test case.

Adding Documents

You can upload supporting documents such as text files, audio files, videos, and so on to table-level test cases.

To add documents to table-level test cases, follow these steps:

1. In the **System Catalogue** pane, click a table, and click **Test Specification**.

The Test Case Overview appears.

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🔺 🏭 Metadata	00	9							
Image: State of the state of	# Test	Test Case	Test Case Label	Type of Testing	Description	Created By	Created Date	Modified By	Modified Date
⊿ 🗐 A_System	Case	d Name							
⊿ 🚼 A_Environment (v1.01)									
dbo.CAT_DIALOG_PROFILE									
dbo.CAT_DIALOG_TAB	1 10	T_Name	Test_Case_Label	Source to Target Test	i	Administrator	2019-10-25 11:3	Administrator	2019-10-25 11:39
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dbo.CAT_TEMPLATES									
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dbo.CHAT_THREAD_USER	Test Case	Label 1	est_Case_Label						
dbo.CHAT_USER_MESSAGE									
	Type of Te	sting	Source to Target Testing	9					•

2. In the bottom pane, click **Document Upload**.

DATA INTELLIGENCE SUITE Metadata A	Manag	er					1	Search	Q	. \$ 0 8
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A Environment (v1.01)										
b dbo.CAT DIALOG PROFILE										
dbo.CAT_DIALOG_TAB	1	10	T Name	Test Case Label	Source to Target Testing		Administrate	or 2019-10-25 11:31:	5 Administrator	2019-10-25 11:39:0
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3. Click •.

The Add Test Case Document page appears.

Add Test Case Document	_ - ×
	Save Cancel
Document Name*	Document Owner
Document Object	Drag-n-Drop files here or Click to select files for upload.
Intended Use Description	ữ 🛕 B I 및 Ε Ξ 🗮 🗮 🗄 🗄 🗄 ¥
	•
Approval Required Flag	

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

Field Name	Description					
	Specifies the name of the physical document being attached to the					
Document Name	test case.					
	For example, Resource Details.					
Document Object	Drag and drop document files or use ≐ to select and upload doc-					
	ument files.					
Document Owner	Specifies the document owner's name.					
Document Owner	For example, John Doe.					
	Specifies the URL of the document.					
Document Link	For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-					
	b5YkMBq4ptA7jhg5/view					
Intended Lise	Specifies the intended use of the document.					
Description	For example: The document has information about the resources					
	of the application.					
Approval	Specifies whether the document requires approval.					
	Select the Approval Required Flag check box to select the doc-					
	ument status.					
	Specifies the status of the document.					
Document Status	For example, In Progress.					
	This field is available only when the Approval Required Flag check					
	box is selected.					

5. Click Save.

The document is added to the test case.

Managing Test Cases

Managing table-level test cases involves:

- Updating test cases
- Exporting test cases
- Deleting test cases

To update table-level test cases, follow these steps:

- 1. Go to Application Menu > Data Catalog > Metadata Manager.
- 2. In the **System Catalogue** pane, click a table.
- 3. Click the **Test Specification** tab and double-click a test case.

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System Catalogue <	↓ lity	Docu	uments Ext	ended Properties	Indexes Impact A	nalysis Forward Lineage	Reverse Linea	ge Test Speci	lication Wo	rkflow Log
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🔺 🌉 Metadata	0									
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⊿ 🗐 A_System		Case la	Name							
⊿ 🖶 A_Environment (v1.01)										
dbo.CAT_DIALOG_PROFILE										
dbo.CAT_DIALOG_TAB	1	10	T_Name	Test_Case_Label	Source to Target Test	i	Administrator	2019-10-25 11:3	1 Administrator	2019-10-25 11:35
dbo.CAT_TABS										
dbo.CAT_TEMPLATE_OPTIO										
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dbo.CATFX_CAT_COMPON										
dbo.CATFX_DIALOG_COM				14 4	Records from 1 to 1	> > 👔 🕐 Page 1 .	25 rows p	er page 🖕		
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dbo.CHAT_USER_MESSAGE				ourse to Target Testin						
	Typ	e or restir	ig D	once io raiger resiliti	J					•

4. In the Test Case Overview tab, click 🖉.

You can update the test case.

To export a test case, click the test case in the **Test Case Summary** pane, and click 1.

To delete a test case, click the test case in the **Test Case Summary** pane, and click

Viewing Metadata Manager Dashboard

The Metadata Manager Dashboard displays metrics that help you analyze and track your metadata. It presents this information using charts and graphs.

To access Metadata Manager Dashboard, follow these steps:

1. Go to Application Menu > Data Catalog > Metadata Manager.

Met	adata Summary				•
۰.	Data Dictionary	Configure Extended Properties	Scheduled Jobs		•
#	System	Business Purpose	# of Environments	Created By	Created Date
1	erwin DI Suite		1	Administrator	2020-07-29 11:0 🔺
2	erwin DM		3	Administrator	2020-02-26 03: 💁
3	erwinDISPoC		0	Administrator	2020-03-30 05: 🚆
4	Informatica		1	Administrator	2020-02-26 03: 👸
5	MS Excel		1	Administrator	2020-04-02 07:0
6	New		1	Administrator	2020-05-18 12:0
7	Oracle		1	Administrator	2020-02-27 05:2
8	Salesforce		3	Administrator	2020-02-26 03:5
9	SAP		1	Administrator	2020-02-26 03:5 💂
	۱< <	Records from 1 to 17 > >	Page 1 🖕	25 rows p	per page 🖕
Met	adata Manager D	ashboard			

2. Click the Metadata Manager Dashboard pane.



The Metadata Manager Dashboard pane appears.

UI Section	Function		
1-System Overview	It displays number of columns in each system.		
2-System Usage in Map-	It displays usage of each system in mannings		
<u>pings</u>	it displays usage of each system in mappings.		
2-System Summary	It displays number of environments, tables, and columns in		
S-System Summary	each system.		
4-Sensitive Data Indic-	It displays number of consitive columns in each system		
ators	it displays number of sensitive columns in each system.		

System Overview

The System Overview pane displays the number of columns in each system in a pie chart. To open the chart in the Dashboard View, click the pie chart.



Each slice of the pie chart corresponds to a system. You can drill down and view detailed information in the list format.

To view detailed information about a system, click a slice. The Details View tab opens. It includes system name, enviro-nment name, table name, and column name.

4	[Dashboard View	Details View		
	#	System Name	Environment Name	Table Name	Column Name
	1	Oracle	TechPubs	APPQOSSYS.WLM_F	STATS1
2	2	Oracle	TechPubs	APPQOSSYS.WLM_F	FEATURE_INFO
:	3	Oracle	TechPubs	APPQOSSYS.WLM_F	MEASUREONLY_CUN
4	1	Oracle	TechPubs	APPQOSSYS.WLM_F	MAXPC
;	5	Oracle	TechPubs	APPQOSSYS.WLM_F	MEASUREONLY
(3	Oracle	TechPubs	APPQOSSYS.WLM_F	MODEBTIME
7	7	Oracle	TechPubs	APPQOSSYS.WLM_F	TIMESTAMP
8	3	Oracle	TechPubs	APPQOSSYS.WLM_F	STATS2
5	9	Oracle	TechPubs	APPQOSSYS.WLM_F	MONITOR
1	0	Oracle	TechPubs	APPQOSSYS.WLM_F	PREVMODE
1	1	Oracle	TechPubs	APPQOSSYS.WLM_F	MANAGED
1	2	Oracle	TechPubs	APPQOSSYS.WLM_F	CURMODE
1	3	Oracle	TechPubs	APPQOSSYS.WLM_F	MONITOR_CUMTIME
1	4	Oracle	TechPubs	APPQOSSYS.WLM_F	STATS3
1 	5	Oracle	TechPuls		CURNUMPC

System Usage in Mappings

The System Usage in Mappings pane displays the number of instances each system is used in mappings in a pie chart. To open the chart in Dashboard View, click the pie chart.



Each slice of the pie chart corresponds to a system. You can drill down and view detailed information in the list format.

To view detailed information about a system, click a slice. The Details View tab opens. It displays system name, project name, map name, and system usage in mappings.

4	Dashboard View	Details View		•
#	System Name	Project Name	Map Name	System Usage In Mappings
1	Oracle	erwinDIS	erwinSalesIntegration(1.01)	7
2	Oracle	erwinDIS	SalesforceIntegration(1.00)	7
3	Oracle	Project	SalesforceIntegration(1.00)	7
4	Oracle	Project Tech Pubs	erwinSalesIntegration(1.01)	7

System Summary

The System Summary pane displays the number of environments, tables, and columns in each system in a bar graph. To open the bar graph in the Dashboard View, click the bar





Each set of three bars corresponds to a system and represents the number of environments, tables, and columns in the system. You can drill down and view detailed information in the list format.

To view the detailed information, click a bar.

For example, if you click a table bar, then the Tables tab opens.

•	Dashboard \	View De	atails View			
•	Environme	ents	Tables	Colum		
#	System Name	Environmen Name	Table Name	Table Alias	Table Class	Туре
1	Oracle	TechPubs	APPQOSSYS.			TABLE
2	Oracle	TechPubs	APPQOSSYS.			TABLE
3	Oracle	TechPubs	APPQOSSYS.			TABLE
4	Oracle	TechPubs	APPQOSSYS.			TABLE
5	Oracle	TechPubs	APPQOSSYS.			TABLE
6	Oracle	TechPubs	AUDSYS.AUD			TABLE
7	Oracle	TechPubs	DBSFWUSER			TABLE
8	Oracle	TechPubs	DBSFWUSER			TABLE
9	Oracle	TechPubs	DBSFWUSER			TABLE
10	Oracle	TechPubs	DIS10_GA65./			TABLE
11	Oracle	TechPubs	DIS10_GA65.4			TABLE
12	Oracle	TechPubs	DIS10_GA65./			TABLE
13	Oracle	TechPubs	DIS10_GA65.4			TABLE
•	0!-	T L D L .				TABLE

Sensitive Data Indicators

The Sensitive Data Indicators pane displays the number of sensitive columns in each system in a bar graph. To open the bar graph in the Dashboard View, click the bar graph.



Each bar of the bar graph corresponds to a system. You can drill down and view detailed information in the list format.

To view detailed information about sensitive columns in a system, click a bar. The Details View tab opens. It displays system name, environment name, table name, column name, and SDI flag.

4	Dashboard View		De	Details View			Þ
#	System Name	System Environm Name	Table Name	Column Name	SDI Flag	Crea By	Cre Tim
1	SQL Syst	Northwind	dbo.Cate	Category	Y	Admin	02/2€
2	SQL Syst	SQL Env	dbo.Adve	DBVersio	Y	Admin	02/26
3	SQL Syst	SQL Env	dbo.Adve	VersionD	Y	Admin	02/2€
4	SQL Syst	SQL Env	dbo.DimA	Operator	Y	Admin	02/2€
5	SQL Syst	SQL Env	dbo.DimA	CustomM	Y	Admin	02/2€
6	SQL Syst	SQL Env	dbo.DimC	EmailAdd	Y	Admin	02/20
7	SQL Syst	SQL Env	dbo.DimC	YearlyIno	Y	Admin	02/20
8	SQL Syst	SQL Env	dbo.DimE	FirstNam	Y	Admin	02/2€