



**erwin Data Intelligence Suite**

**Mapping Management Guide**

**Release v10.0**

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## Managing Mappings

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

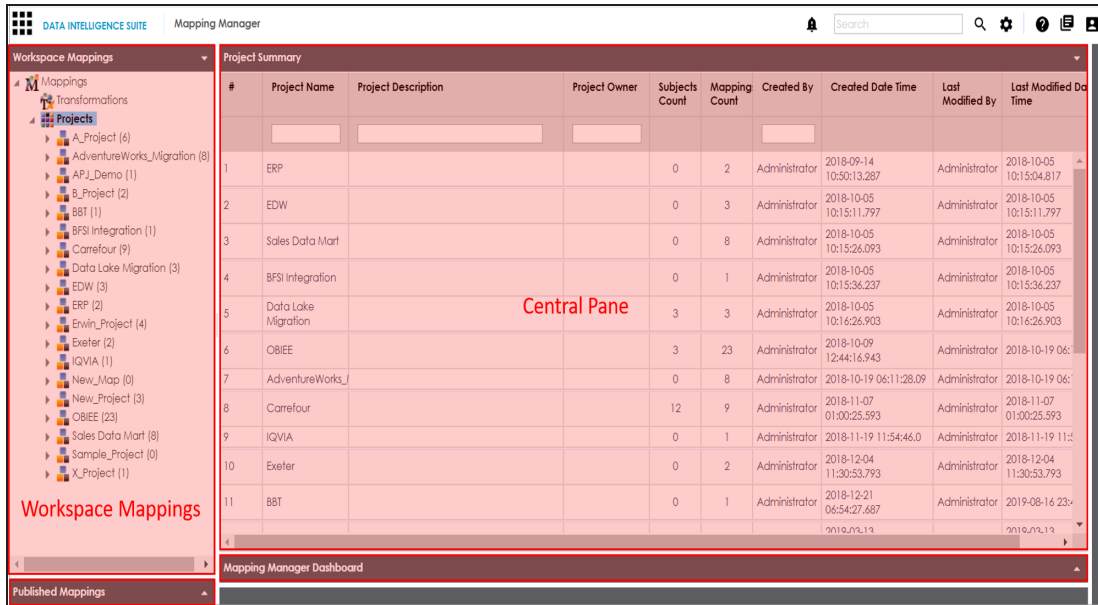
Mapping Manager is the core of erwin Data Intelligence Suite (DIS), where you do the following:

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

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

## Using Mapping Manager

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



UI Section	Function
Workspace Mappings	Use this pane to browse and work on different projects and mappings.
Published Mappings	Expand this pane and browse through it to view and export published mapping details.
Central Pane	Based on your selection in the browser pane, use this pane to view or work on the data.
Mapping Manager Dashboard	Expand this pane to view statistics related to mappings and projects in the Mapping Manager.

Managing mappings involves the following:

- [Defining and managing transformations](#)
- [Creating and managing mapping specifications](#)
- [Analysing mappings](#)
- [Associating mappings](#)
- [Publishing and creating new versions of mappings](#)
- [Exporting mapping specifications](#)

## Defining and Managing Transformations

It is highly recommended that you define an exhaustive list of enterprise transformations that can be shared across the organization. This drives standards by streamlining processes, and improves efficiency and productivity.

This section walks you through the process of defining and managing transformations. The transformations can either be defined at the enterprise level or at the project level. The transformations defined at the enterprise level can be used across all the projects in Mapping Manager. The project-specific transformations are applicable to that specific project only.

Defining and managing transformations involves:

- [Defining transformations](#)
- [Defining project specific transformations](#)
- [Uploading transformation details](#)
- [Adding ETL options to transformation library](#)
- [Managing transformation](#)

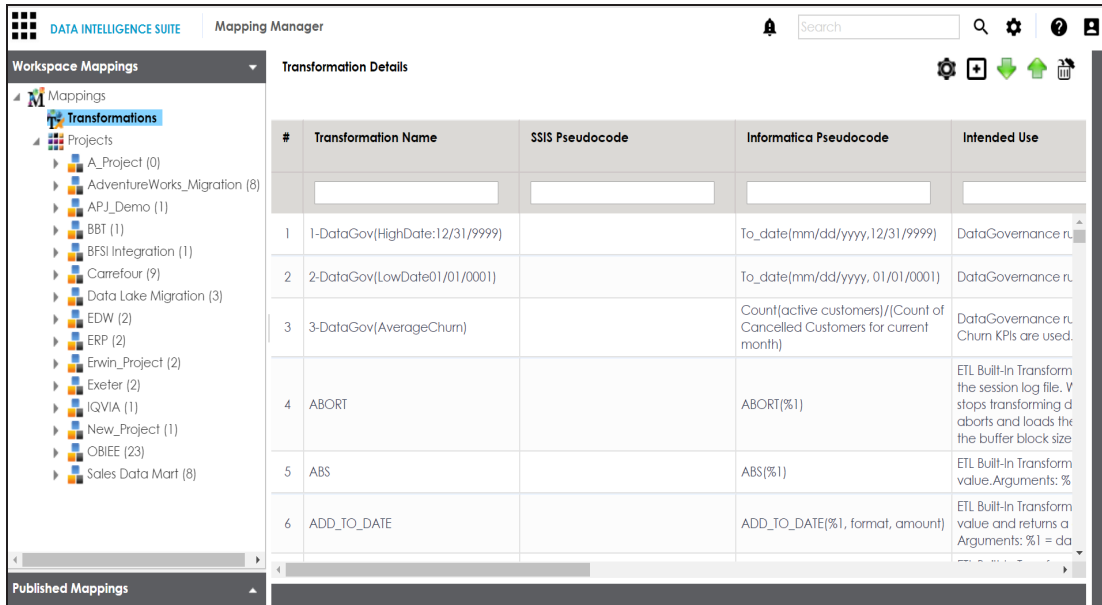
## Defining Transformations

Mapping Manager enables you to define transformations which can be used as business rules and extended business rule transformations in a mapping specification.

To define transformations, follow these steps:

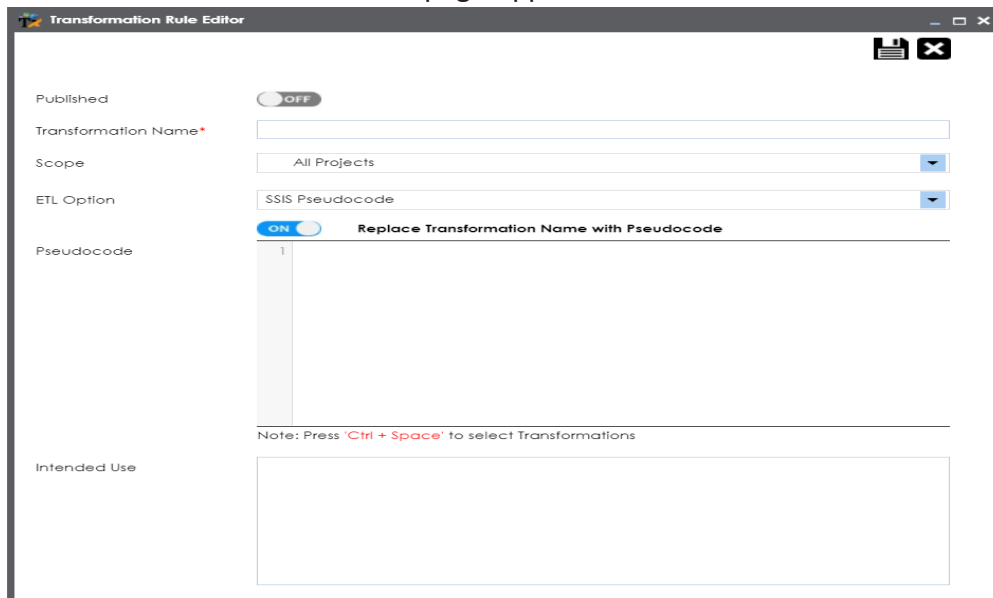
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, click **Transformations**.

Transformation Details page appears.



3. Click .

The Transformation Rule Editor page appears.



4. Toggle the **Published Toggle Switch** to **ON** to publish the transformation.

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
Transformation Name	Enter a unique transformation name.
Scope	Select the scope of the transformation.
ETL Option	Select the ETL option.

6. Switch **Replace Transformation Name with Pseudocode** to **ON** to replace the transformation name with pseudocode.
7. Place the cursor in the **Pseudocode** box and type a pseudocode or use Ctrl + Space to select a pseudocode.

**Note:** You can use multiple pseudocode for a transformation.

8. Click .

A new transformation is added under the Transformations node.

The transformations can also be uploaded in bulk [using MS Excel file](#).

You can [manage transformations](#) by:

- Editing transformation details
- Running impact analysis on transformations
- Viewing history of transformations

You can also add or remove ETL Options from the global transformation library, for more information on this, refer to the [Adding ETL Options to the Transformation Library](#) topic.

## Defining Project Specific Transformations

To define project specific transformations, follow these steps:

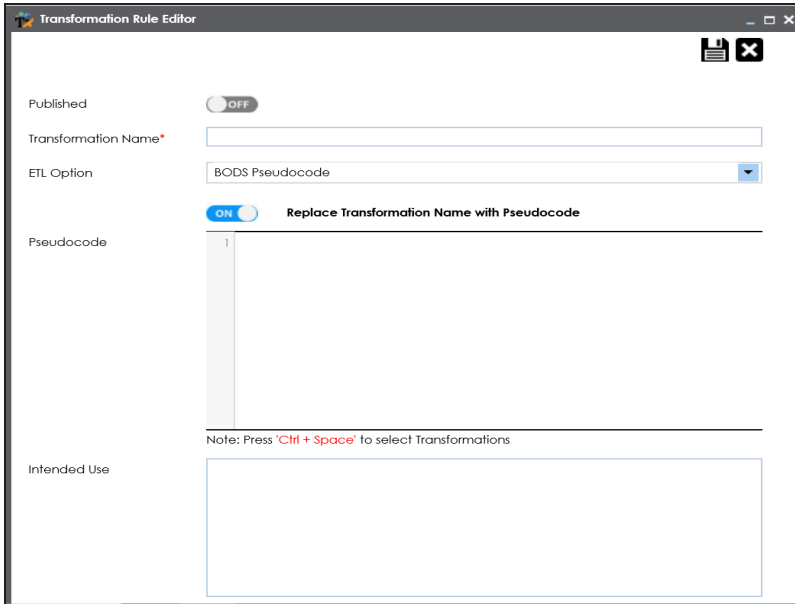
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Click the **Transformations** node.

The Transformation Details page appears.




4. Click .

Transformation Rule Editor page appears.



The image shows a screenshot of the 'Transformation Rule Editor' window. It has a title bar with standard window controls. Inside, there are several fields and controls: a 'Published' toggle switch currently set to 'OFF'; a 'Transformation Name\*' text input field; an 'ETL Option' dropdown menu showing 'BODS Pseudocode'; a 'Replace Transformation Name with Pseudocode' toggle switch currently set to 'ON'; a 'Pseudocode' text area with the number '1' entered; and an 'Intended Use' text area. A note below the pseudocode field says 'Note: Press 'Ctrl + Space' to select Transformations'. There are also icons for saving and closing in the top right corner.

5. Toggle the **Published** switch to **ON** to publish the transformation.
6. Enter a unique transformation name.
7. Select the desired ETL option.
8. Toggle the **Replace Transformation Name with Pseudocode** to **ON** to replace transformation name with pseudocode.
9. Place the cursor in **Pseudocode** box and type a pseudocode or press Ctrl-Space to select a pseudocode.
10. Click .

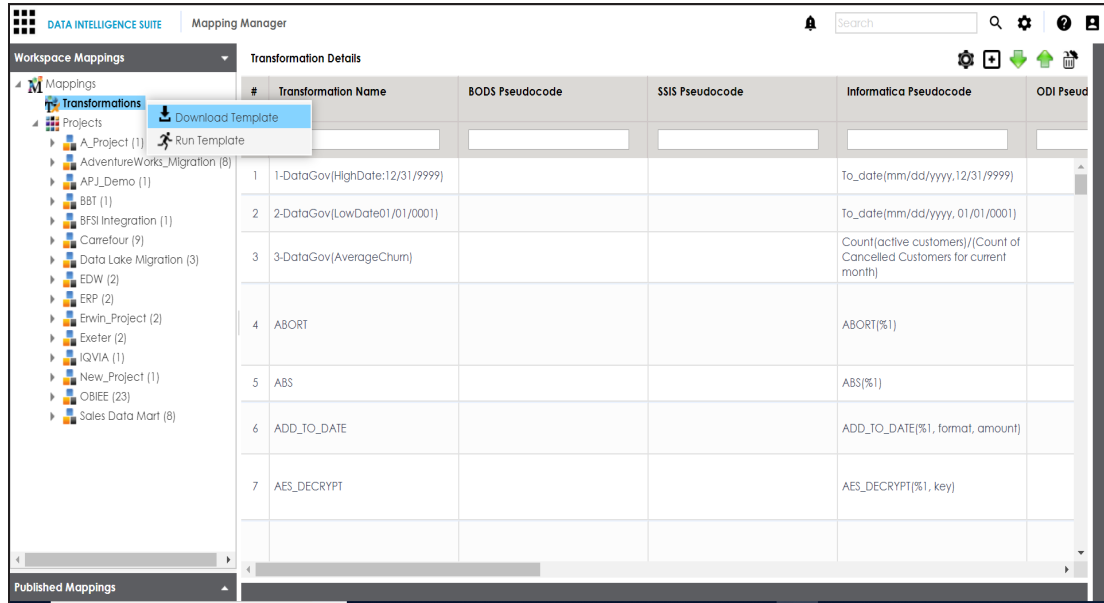
The transformation is available for the selected project.




## Uploading Transformation Details

You can use MS Excel file to upload transformations in bulk.

To upload transformation details, follow these steps:

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



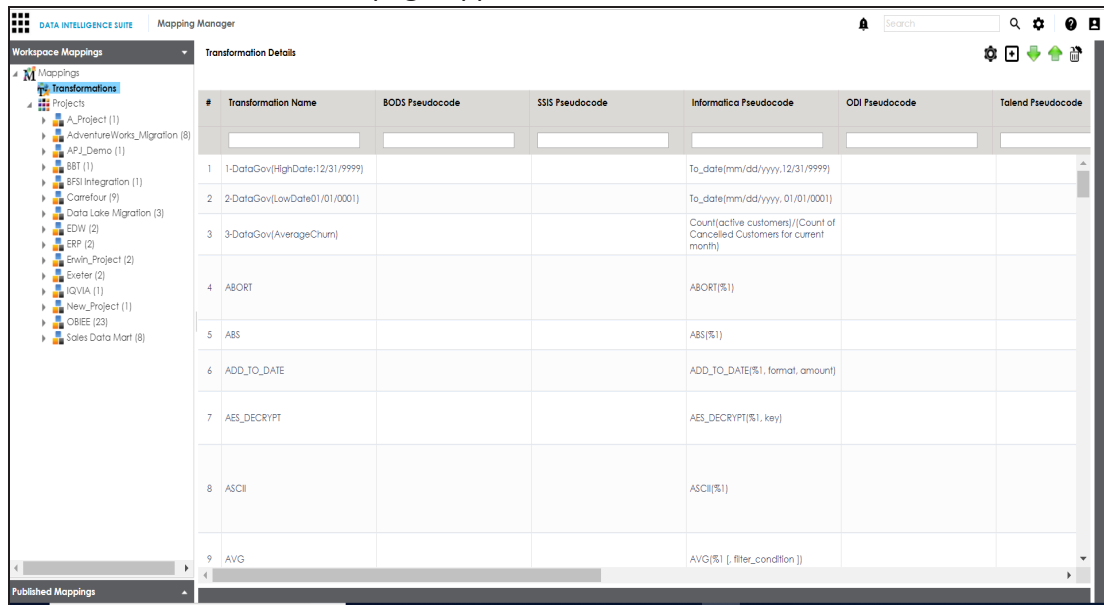
3. Click **Download Template**.  
The template is downloaded in .xlsx format.
4. Enter transformations in the downloaded template.
5. Click .  
The Upload Transformations page appears.
6. Use  to browse the updated template file.
7. Click .  
The transformations are uploaded.

## Adding ETL Options to Transformation Library

To add or remove ETL options from the transformation library, follow these steps:

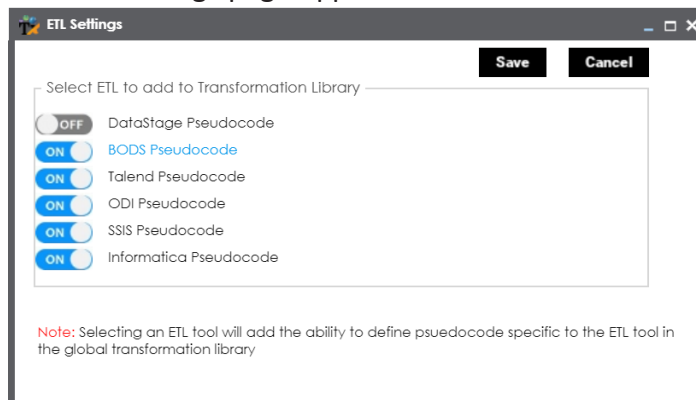
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, click the **Transformations** node.

The Transformation Details page appears.



3. Click .

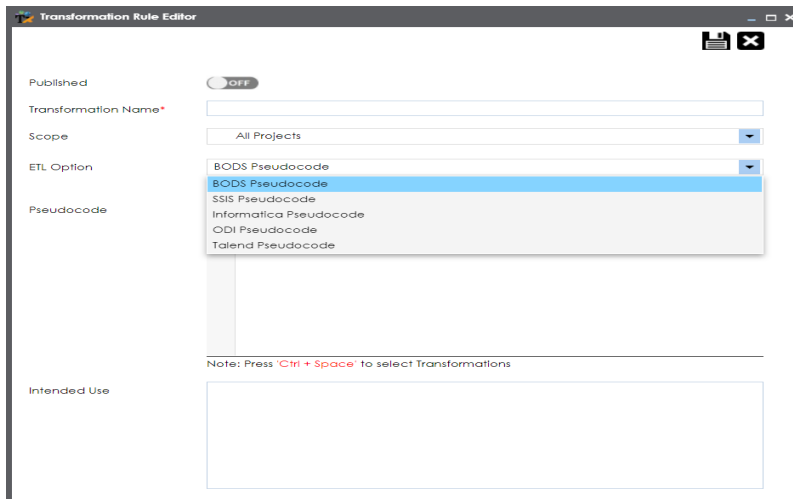
The ETL Settings page appears.



4. Toggle the ETL options which you want to add to the **Transformation Library** to **ON**.

5. Click **Save**.

ETL options are added to the Transformation Library.



## Managing Transformations

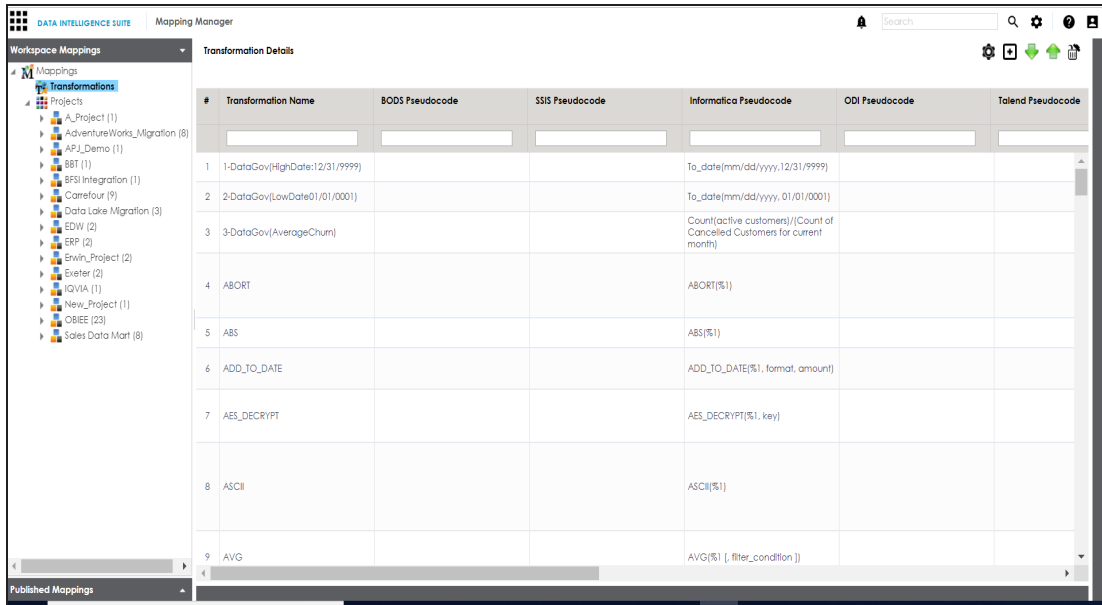
Managing transformations involves:

- Editing transformation details
- Running impact analysis report on transformations
- Viewing history
- Deleting transformations

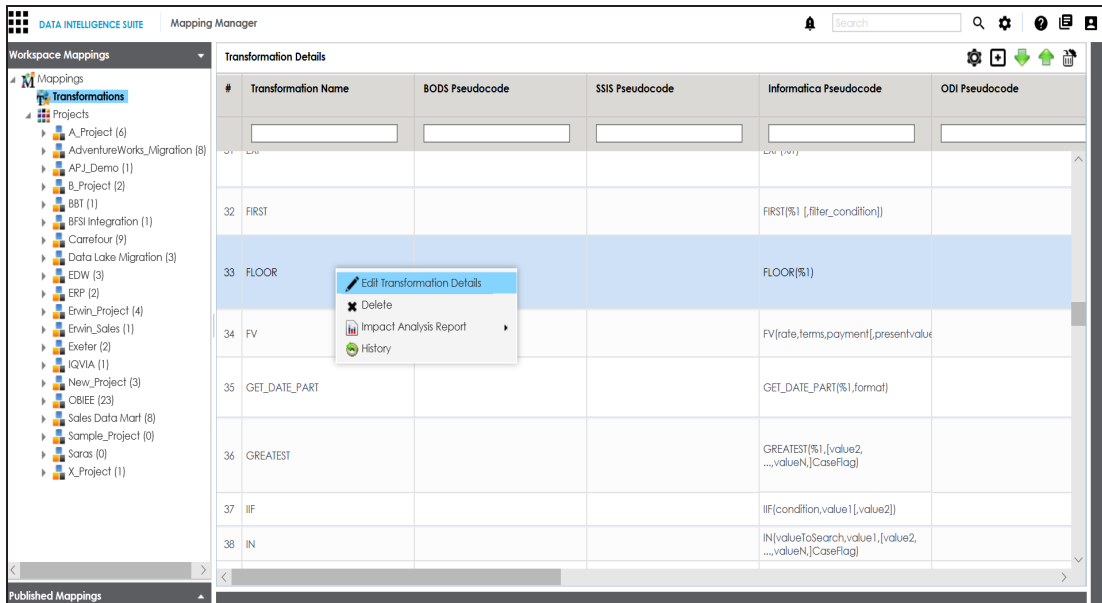
To edit transformation details, follow these steps:

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

The Transformation Details page appears.

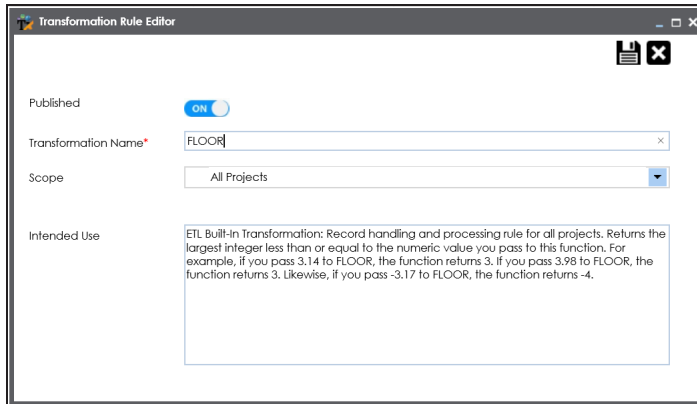


3. Select the desired transformation in the Transformation Details grid and right-click it.



4. Click **Edit Transformation Details**.

Transformation Rule Editor page appears.



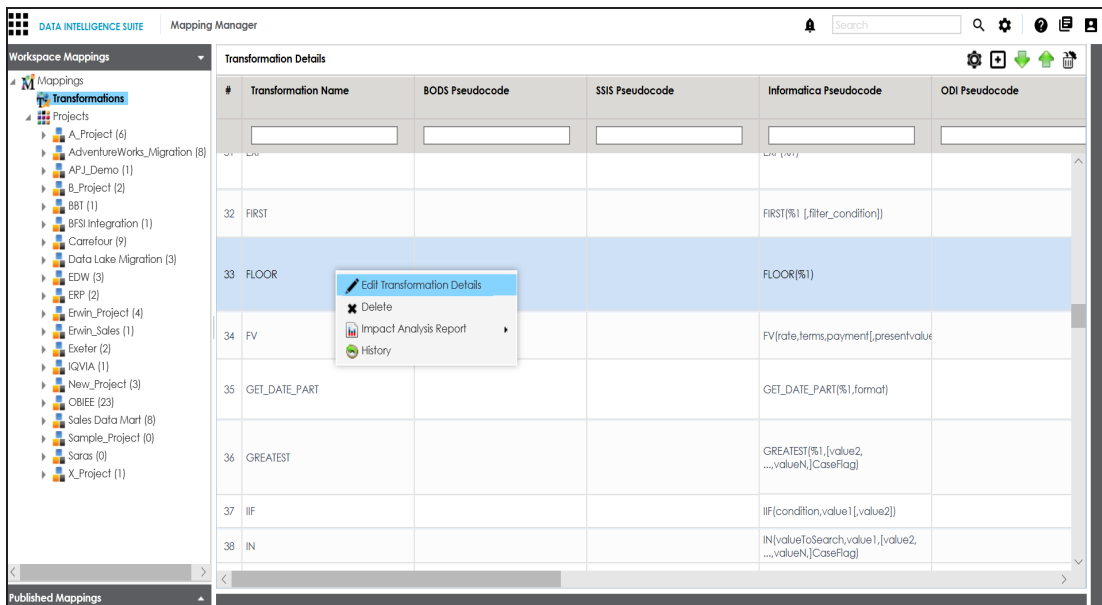
5. Edit the fields as desired.

6. Click .

The transformation is updated.

To run impact analysis on transformations, follow these steps:

1. Select the desired transformation in the Transformation Details grid and right-click it.



2. Hover over the **Impact Analysis Report** and click **Default Search**.

The list of projects and mappings appear where the transformation was used.



The screenshot shows a window titled "Default Search" with a table containing the following data:

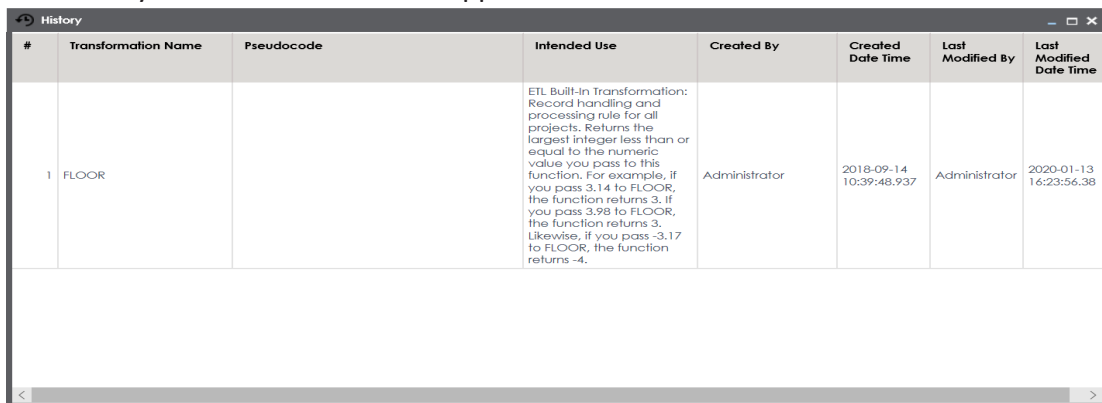
#	Project Name	Mapping Name	Map Specification Version	Business Rule
1	<a href="#">Erwin_Sales</a>	<a href="#">Integration</a>	1.0	FLOOR

At the bottom of the window, there is a status bar that reads: "Records from 1 to 1", "Page 1", and "15 rows per page".

To view history of transformations, follow these steps:

1. Right-click the desired transformation.
2. Click **History**.

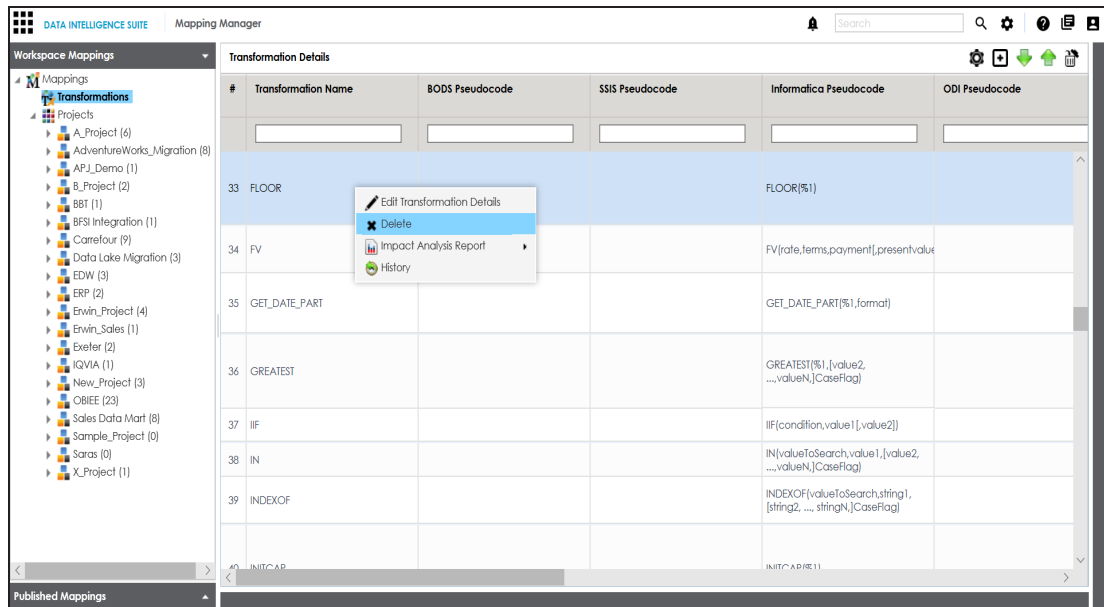
The history of the transformation appears.



The screenshot shows a window titled "History" with a table containing the following data:

#	Transformation Name	Pseudocode	Intended Use	Created By	Created Date Time	Last Modified By	Last Modified Date Time
1	FLOOR		ETL Built-In Transformation: Record handling and processing rule for all projects. Returns the largest integer less than or equal to the numeric value you pass to this function. For example, if you pass 3.14 to FLOOR, the function returns 3. If you pass 3.98 to FLOOR, the function returns 3. Likewise, if you pass -3.17 to FLOOR, the function returns -4.	Administrator	2018-09-14 10:39:48.937	Administrator	2020-01-13 16:23:56.38

1. To delete the transformation, follow these steps:
2. Right-click the desired transformation.



3. Click **Delete**.

A warning message appears.

4. Click **Yes** to delete the transformation.

The transformation is deleted.

**Note:** If the transformation was used in the Mapping Specification, then it will still be there. But, it will not be available for future use.

## Creating and Managing Mapping Specifications

After defining systems and uploading metadata, you can create mapping specifications. Mapping Manager enables you to create mapping specifications in multiple ways. In this section you will walk through how to build metadata driven source to target mapping specifications and enterprise standards to manage them.

Creating and managing mapping specifications involves:

- [Creating projects](#)
- [Creating mapping specifications using Auto-map](#)



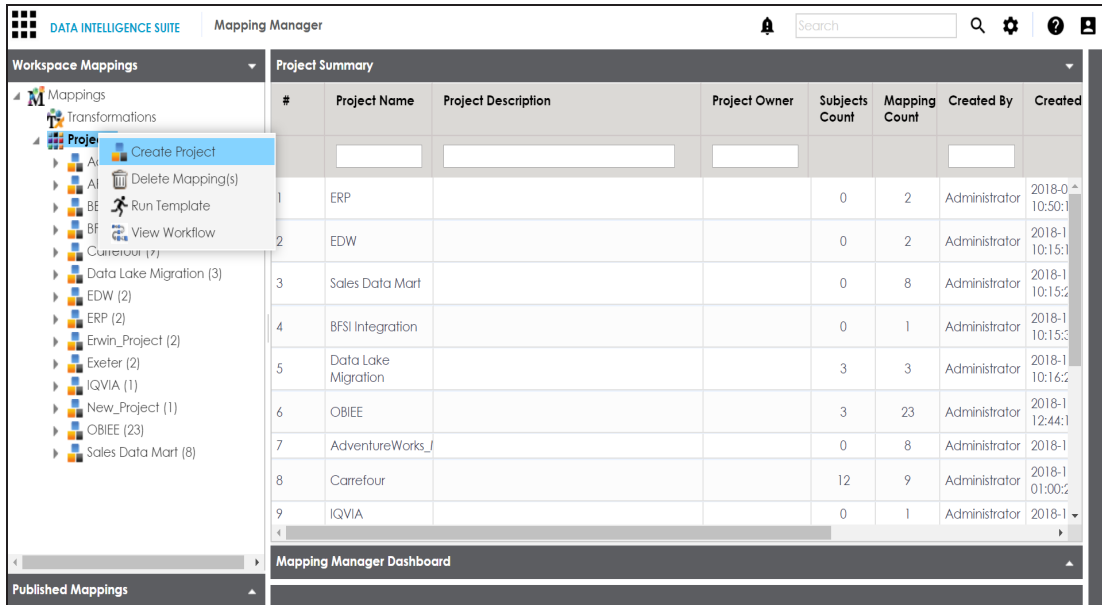
- [Creating mapping specifications using drag and drop technique](#)
- [Creating mapping specifications graphically](#)
- [Adding transformation and lookup details in the mapping specification](#)
- [Updating mapping specifications manually](#)
- [Creating one to many and many to many mapping specifications](#)
- [Specifying XPath in mapping specification](#)
- [Setting column order and column visibility](#)
- [Switching to business view](#)
- [Updating additional mapping information](#)
- [Branching and merging mappings](#)
- [Deleting maps](#)
- [Viewing workflow logs](#)

## Creating Projects

Maps are categorized under projects and a project can have multiple maps. The maps are stored in a hierarchical manner, **Projects > Mappings**.

To create a new project, follow these steps:

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



### 3. Click **Create Project**.

The Create Project page appears.

The screenshot shows the 'Create Project' form. It has three tabs: 'Project Details' (selected), 'Project Documents', and 'Project Users'. At the top right are buttons for 'Save & Continue', 'Save & Exit', and 'Cancel'. The form fields include:
 

- Project Name\***: A text input field.
- Cost Center**: A text input field.
- Description**: A rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and other formatting options.
- Project Manager Name**: A text input field.
- IT Sponsor Name**: A text input field.
- Business Sponsor Name**: A text input field.
- Project ETL**: A dropdown menu currently showing 'SSIS Pseudocode'.
- Enable display of Transformation without pseudocode**: A toggle switch currently set to 'NO'.

### 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
Project Name	Enter a unique project name.
Description	Enter a small description of the project.
Project Manager Name	Enter project manager's name.
Business Sponsor Name	Enter business sponsor's name.
Project ETL	Select the project ETL.
Cost Center	Enter the cost center.
IT Sponsor Name	Enter the IT sponsor's name.

5. Toggle between **YES** or **NO** to enable/disable the display of transformation without pseudocode.
6. Click **Save and Exit**.

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

Once a project is created, you can do the following:

- [Add project documents](#)
- [Assign users to the project](#)
- [Create subject areas](#)
- Create mapping specification using one of the ways:
  - [Auto-map](#)
  - [Drag and drop technique](#)
  - [Graphically](#)

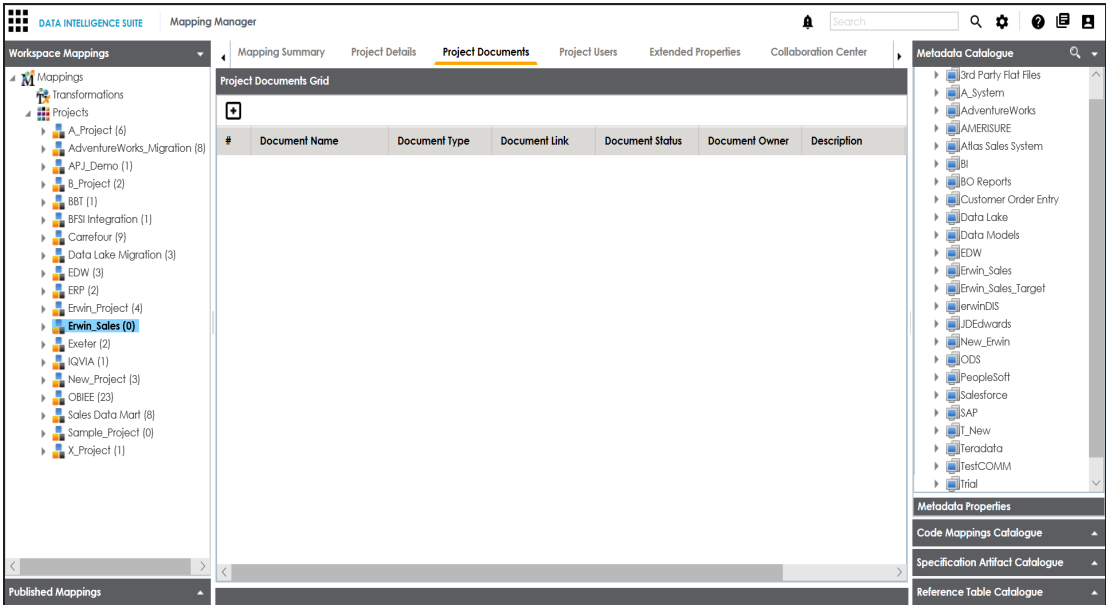
## Adding Project Documents

To add documents to the projects in Mapping Manager, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Click the desired project.

4. Click the **Project Documents** tab.

The following page appears.




5. Click .

The Add Project Document page appears.

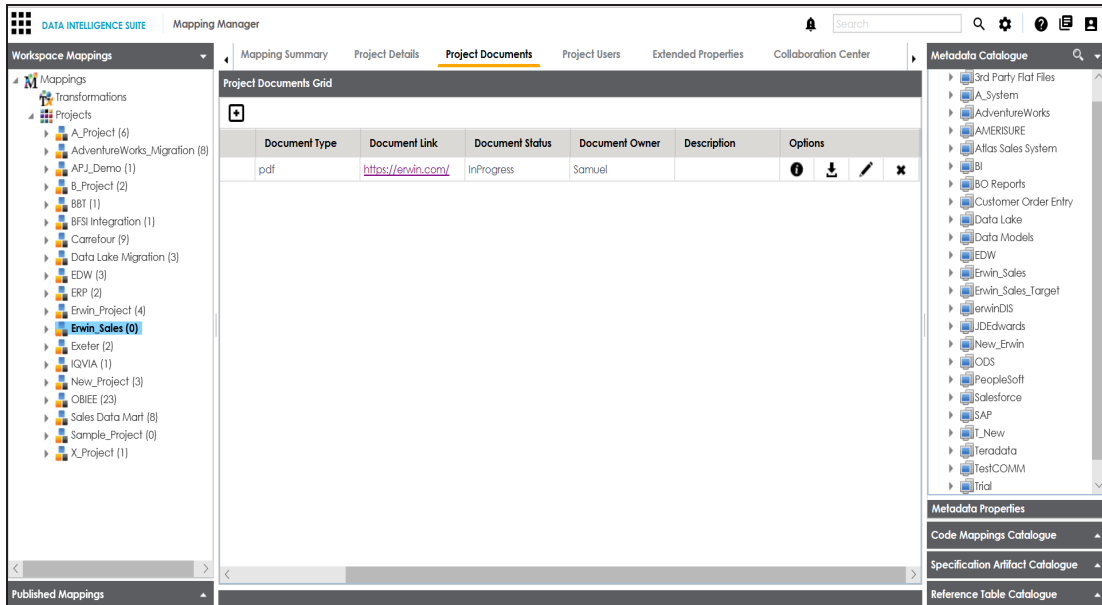
The screenshot shows the 'Add Project Document' form. It has a dark header bar with the title 'Add Project Document' and window controls. The form contains several input fields: 'Document Name\*' (required), 'Document Reference', 'Reference Number', 'Document Link', 'Document Owner', and 'Document Object'. There is a large text area for 'Description' with a rich text editor toolbar above it. At the bottom left, there is an 'Approval Required Flag' checkbox. On the right side, there is a drag-and-drop area with a blue arrow icon and the text 'Drag-n-Drop files here or click to select files for upload.'.

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




Option	Description
Document Name	Enter the name of the document..
Document Reference	Enter reference document.
Reference Number	Enter reference number.
Document Owner	Enter the document owner's name.
Document Object	Drag and drop or use  to upload relevant files.
Document Link	Enter Url related to the document.
Description	Enter a small description of the document.
Approval Required Flag	Select the <b>Approval Required Flag</b> check box if the document requires approval.
Document Status	Select the status of the document from the drop down. This field appears when the <b>Approval Required Flag</b> checkbox is selected.

7. Click .

The project document is saved in the Project Documents Grid.



Use the following options:

- To view document information, click .
- To download the document, click .
- To edit document details, click .

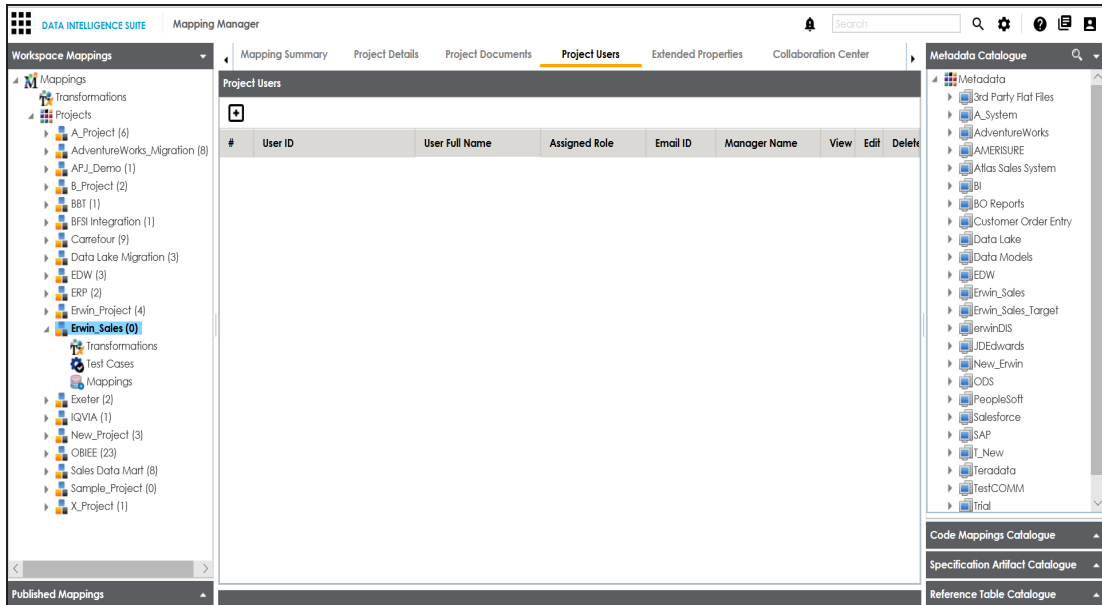
## Assigning Users to Projects

You can assign multiple users to a project. Users assigned to a project have write access to all the mappings under it.

To assign users to projects, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, click the desired project.
3. Click the **Project Users** tab.



The following page appears.





4. Click .

The Assign Project Users page appears.



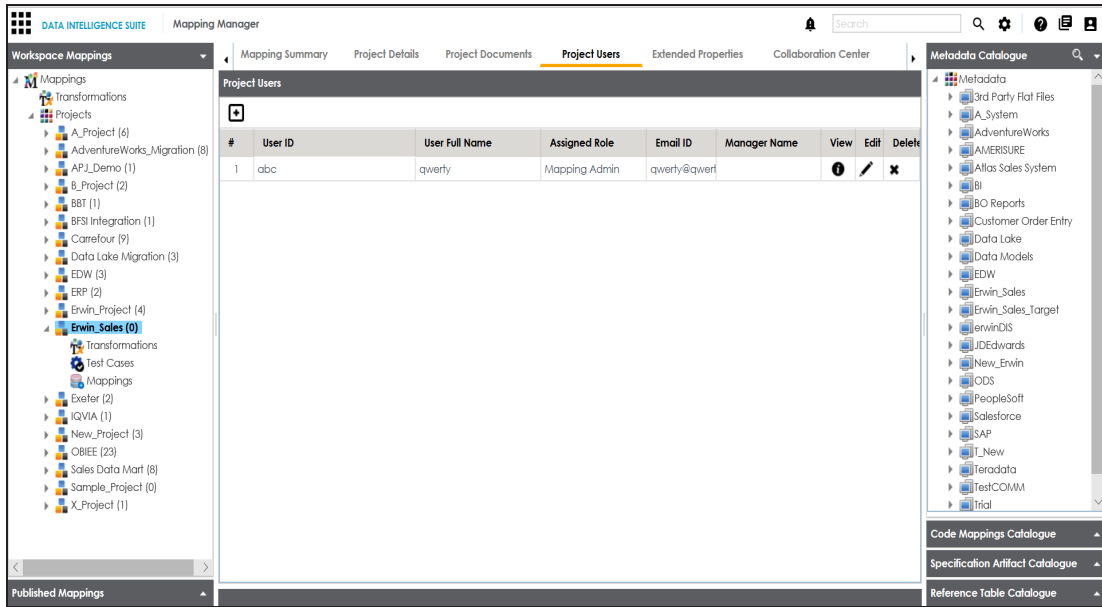
5. Use  or  to move users from **User ID** box to **Assigned Users** box.

6. Use  or  to move users from **Assigned Users** box to **User ID** box.

**Note:** Users with Administrator role cannot be assigned to a project.

7. Click .

The users are assigned to the project and it is saved in the Project Users tab.



Once the user is assigned to a project, you can use the following options:

- To view user details, click .
- To assign responsibility to the user, click .

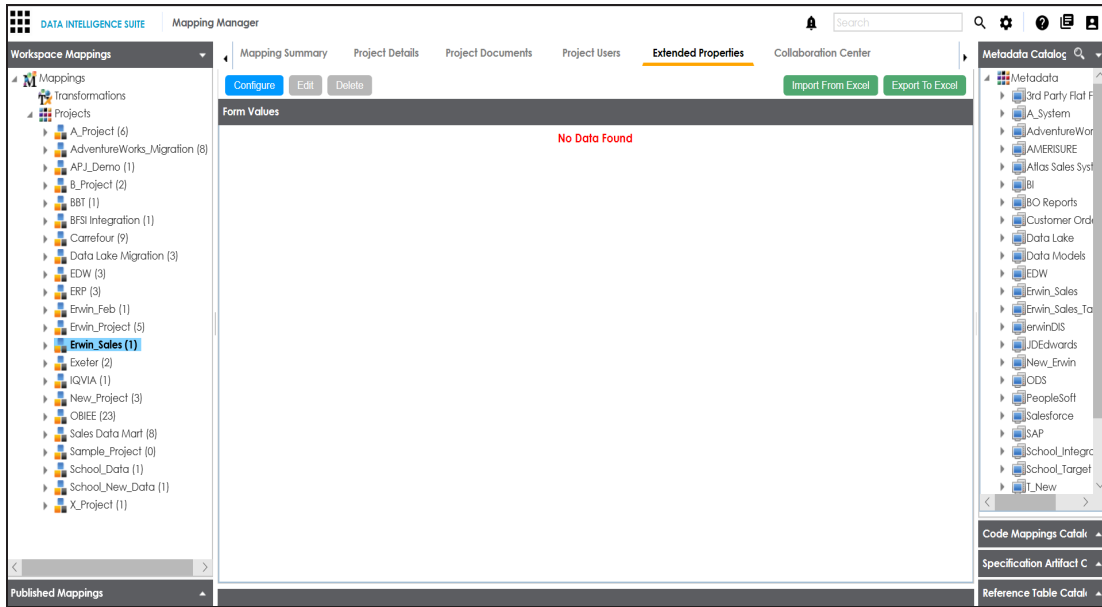
## Extending Project Properties

You can configure extended properties of a project by designing a form and access the form under the **Extended Properties** tab.

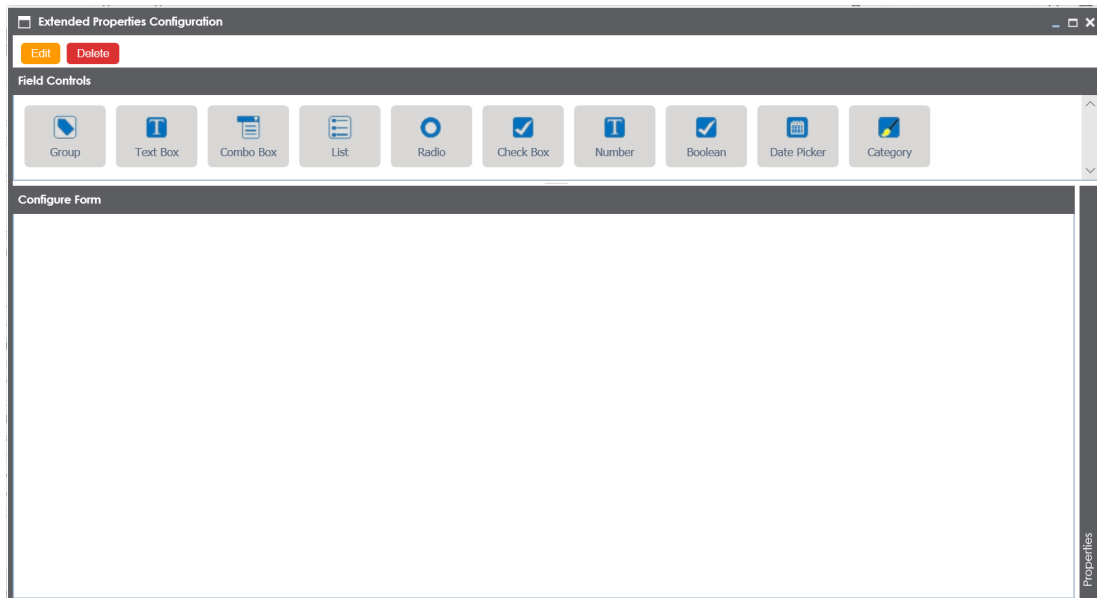
To configure extended properties of projects, follow these steps:

1. Under the Workspace Mappings pane, click a project and click the **Extended Properties** tab.





2. Click **Configure**.



The **Extended Properties Configuration** page contains the following sections:

- **Field Controls:** This pane displays the available UI elements.
  - **Configure Form:** Use this pane to design forms using the available UI elements in the **Field Controls** pane.
  - **Properties:** This pane displays the properties of the selected UI element in the **Configure Form** pane.
3. Click **Edit** and double-click or drag and drop the required UI elements from the **Field Controls** pane to the **Configure Form** pane.
  4. Select UI elements, one at a time, and configure their properties in the **Properties** pane.

Extended Properties Configuration

Save Cancel Delete

Field Controls

Group Text Box Combo Box List Radio Check Box Number Boolean Date Picker Category

Configure Form

Check Box ☐

Properties

Property	Value
Published	ON
Field	Check Box
Type	Check Box
Dependencies	Type or click here
Configure Values	Configure
Description	
Visible in Extended Properties	ON
Order	1

Note: 1. Double click on the field cell to update the field name  
2. Select the field name to update its properties

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

Refer to the following table for property descriptions:

Property	Description
Published	Turn <b>Published</b> to <b>ON</b> to publish the field.
Field	Double-click the corresponding <b>Value</b> cell to change the label of the field.
Type	Double-click the corresponding <b>Value</b> cell to select different types of the field.

Property	Description
Configure Values	Click <b>Configure Values</b> to enter option values. You can use: <ul style="list-style-type: none"> <li>▪ <b>Default connector</b>: It enables you to enter options manually.</li> <li>▪ <b>Reference Data Manager</b> : It enables you to pull the data from reference tables in the Reference Data Manager.</li> </ul>
Mandatory	Select the check box to make the field mandatory in the form.
Description	Double-click the corresponding Value cell to enter a description of the field.
Visible in Extended Properties	Turn <b>Visible in Extended Properties</b> to ON to make it visible.
Order	Displays the order of the field. You can drag and drop the field in the <b>Configure Form</b> pane to change its order.

5. Click **Save**.

The form is saved under the **Extended Properties** tab.

To use the form, follow these steps:

1. Under the Workspace Mappings pane, click a project and click the **Extended Properties** tab.
2. Click **Edit** and use the form.
3. Click **Save**.

The form is updated.

## Collaborating with Other Users

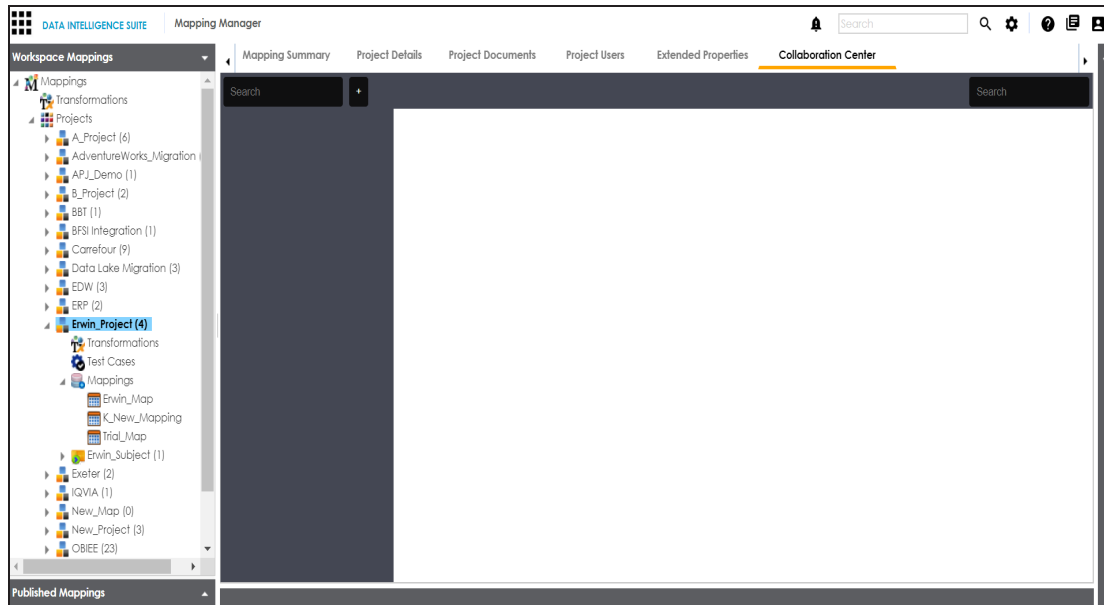
You can collaborate with other users on a project in the Mapping Manager. You need to create a topic under the Collaboration Center and assign users to the topic. The assigned users can chat with each other and discuss the topic.

To collaborate with other users, follow these steps:

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

The Mapping Summary page appears.

3. Click the **Collaboration Center** tab.



4. Click  to add a topic.

The Add Topic page appears.

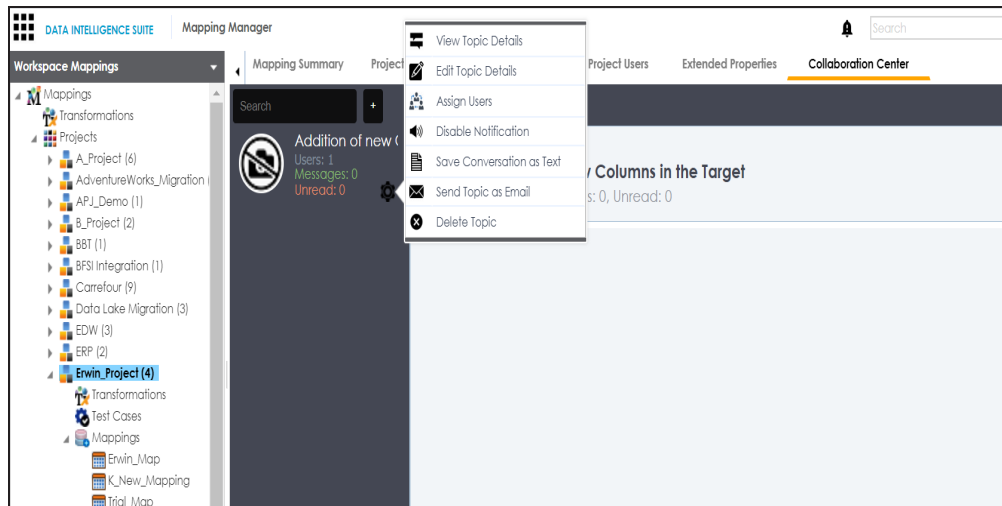
A screenshot of the 'Add Topic' dialog box. It has a title bar with 'Add Topic' and standard window controls. Inside, there are two input fields: 'Topic Name\*' with a red asterisk and a 'Description' field. To the right of the description field is a large text area. In the top right corner of the dialog, there are two icons: a right-pointing arrow and a document icon.

5. Enter Topic Name and Description.

6. Click .

The new topic is created and saved under the Collaboration Center tab.

7. Click .



8. Use the following options:

### View Topic Details

Use this option to view the topic details.

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


### Edit Topic Details

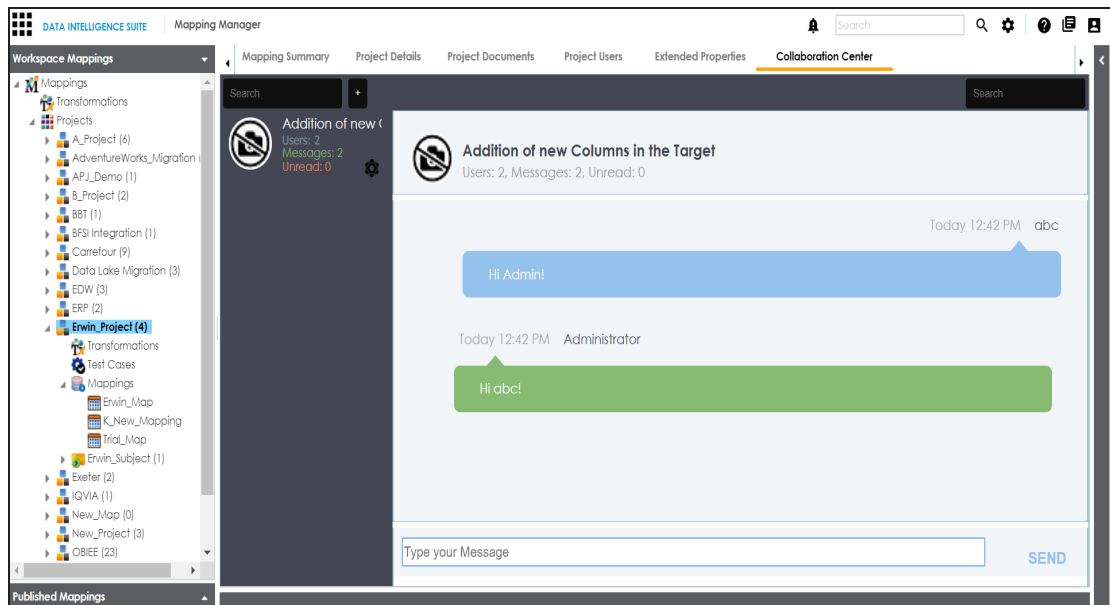
Use this option to edit the topic details.

### Assign Users

Use this option to assign users to the topic.



Select check boxes to assign users to the topic and then click . The assigned users can chat and collaborate with each other.



### Save Conversation as Text

Use this option to download the conversation in a .txt file.

### Send Topic as Email

Use this option to send topic as an email to the assigned users.

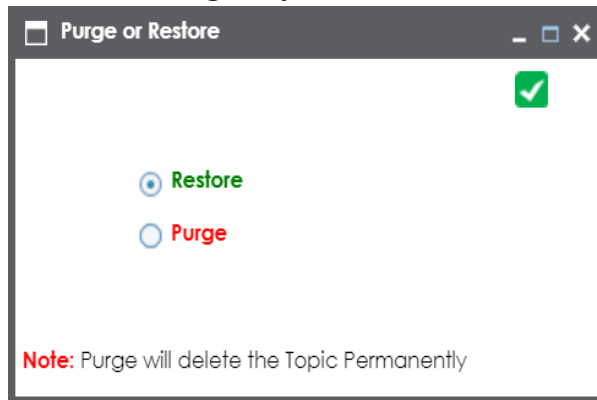
### Delete Topic

Use this option to delete the topic. The topic is deleted for all the assigned users.


**Note:** Any assigned user can delete the topic.

### Restore or Purge Topic

The deleted topic can be restored or deleted permanently (Purge). Click **Restore or Purge Topic**.



To restore the topic, select the **Restore** radio button and click .

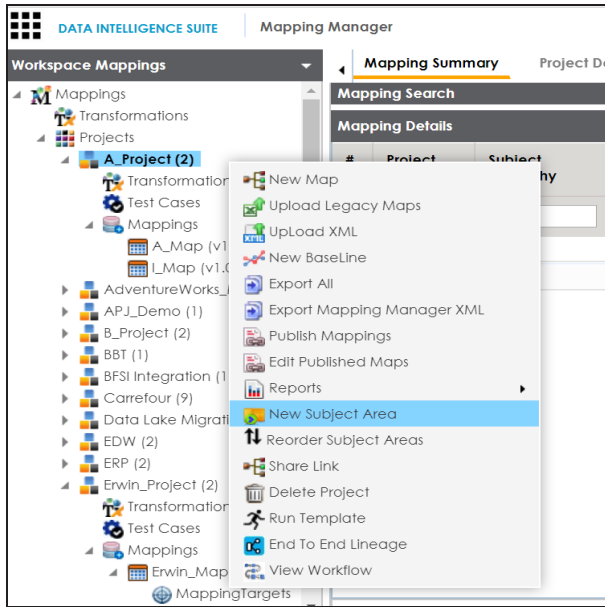
To delete the topic permanently, select the **Purge** radio button and click .

## Creating Subject Areas

Subjects provide one more level of categorization for mapping specifications. You can create a Subject within a project or within another subject. The subject name should be unique at the project root level i.e. the same subject name cannot exist more than once within a project.

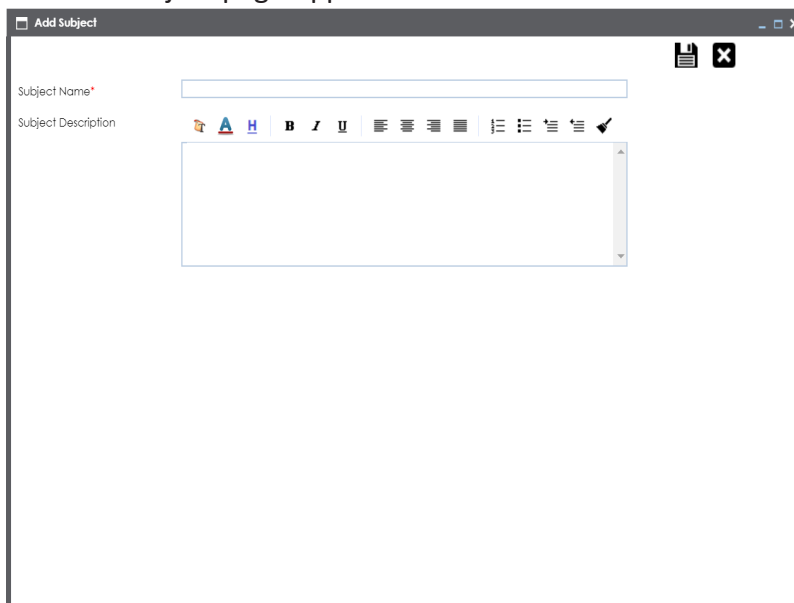
To create subject areas, follow these steps:

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



3. Click **New Subject Area**.

The Add Subject page appears.



4. Enter Subject Name and Subject Description.

5. Click .



A new subject is created and saved under the project node.

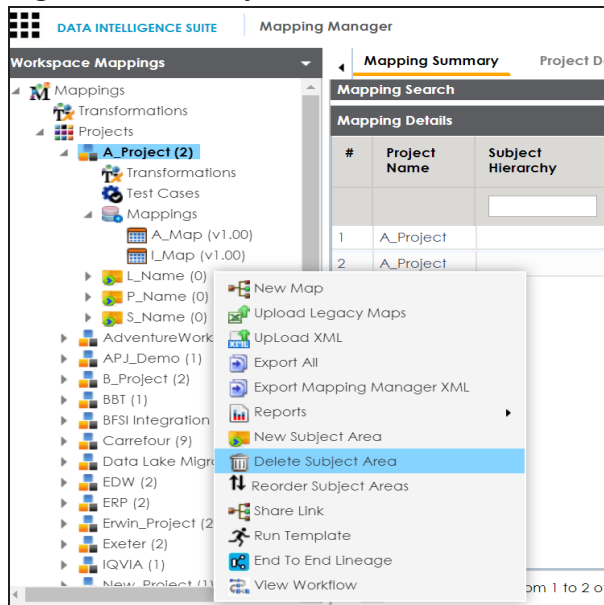
## Managing Subject Areas

Managing subject areas involves:

- Deleting subject areas
- Reordering subject areas

To delete subject areas, follow these steps:

1. Right-click the subject area to be deleted.



2. Click **Delete Subject Area**.

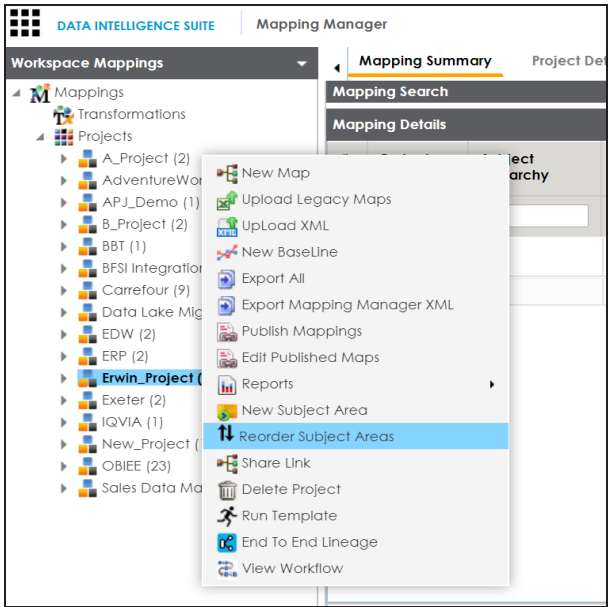
The warning message appears.

3. Click **Yes** to delete the subject area.

The subject area is deleted.

To reorder subject areas, follow these steps:

1. Right-click the desired project.



2. Click **Reorder Subject Areas**.

The following page appears showing all the subjects under the project.

Subjects for: A\_Project (2)

Order By: Ascending Order    Sort Subject By: Subject Name

#	Subject Name	Current Order	New Order	Parent Hierarchy	Created By	Created Date	Modified By	Modified Date
1	L_Name(0)	1	1	A_Project	Administrator	2019-10-30 11:45:11.917	Administrator	2019-10-30 11:45:11.917
2	P_Name(0)	2	2	A_Project	Administrator	2019-10-30 11:44:51.983	Administrator	2019-10-30 11:44:51.983
3	S_Name(0)	3	3	A_Project	Administrator	2019-10-30 11:35:42.867	Administrator	2019-10-30 11:35:42.867


Note: Drag/Drop rows to reorder.

You can sort subjects by :

- a. Subject Name
- b. Created By
- c. Created Date
- d. Modified By
- e. Modified Date

You can order by:

- a. Ascending Order
- b. Descending Order
- c. Custom Order

3. Use  to reset order.

4. Click .

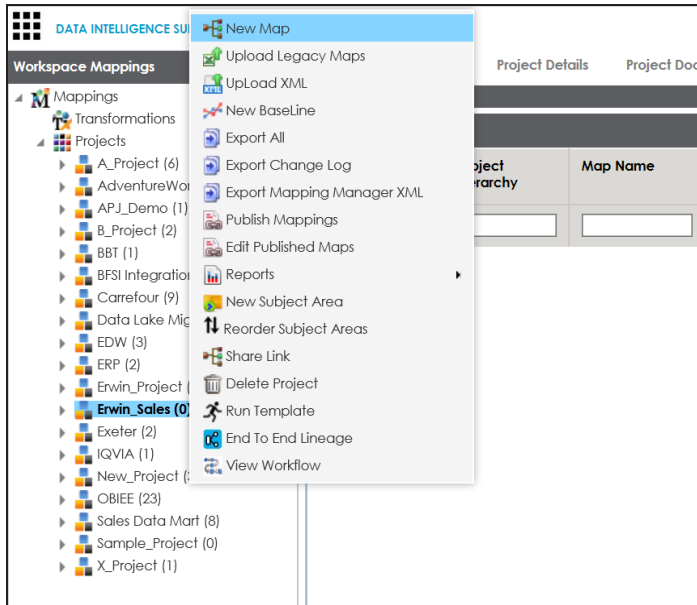
The subject ordering is saved.

## Creating Mapping Specifications Using Auto-Map

Auto-Map technique helps in creating mapping specifications when the column names in source metadata and target metadata are same. You can create multiple mapping groups and perform distinct mappings in each of the groups. You can also update target update strategy after creating the mapping specifications.

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

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



3. Click **New Map**.
4. The New Mapping Wizard page appears.

The 'New Mapping Wizard' dialog box is shown, titled '1. Create a New Mapping'. It contains the following fields and controls:

- Mapping Name\***: A text input field with a red asterisk indicating it is mandatory.
- Mapping Version**: A text input field with the value '1.00'.
- Version Label**: A text input field.
- Sync Source Metadata**: A toggle switch set to 'OFF'.
- Sync Target Metadata**: A toggle switch set to 'OFF'.
- Job Name XRef**: A text input field.
- Mapping Description**: A rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and other formatting options.

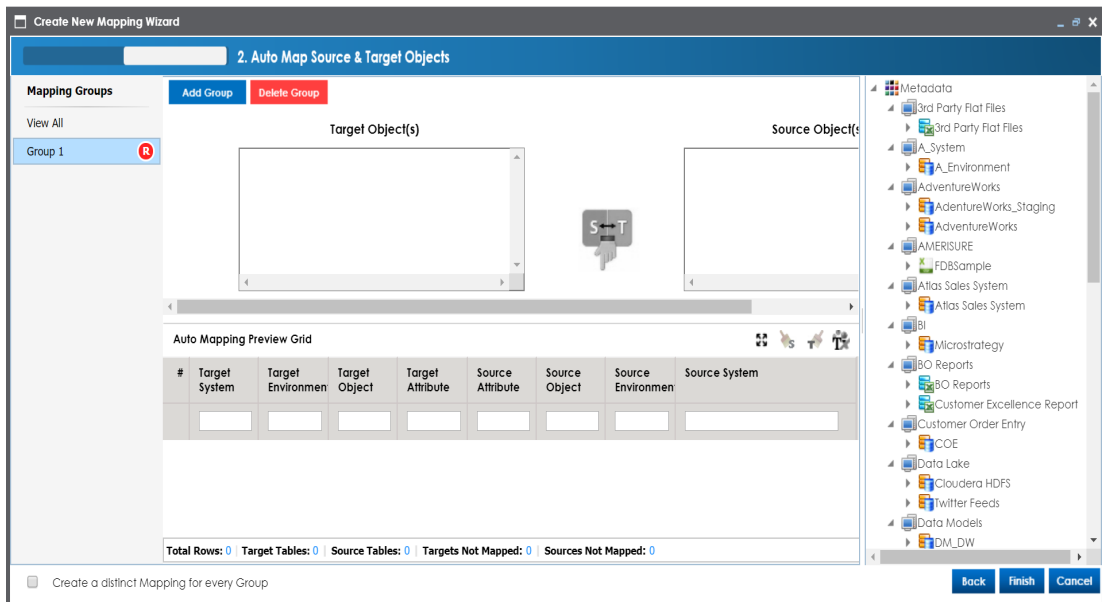
At the bottom right, there are three buttons: 'Proceed with Auto Map' (green), 'Finish' (blue), and 'Cancel' (blue).

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

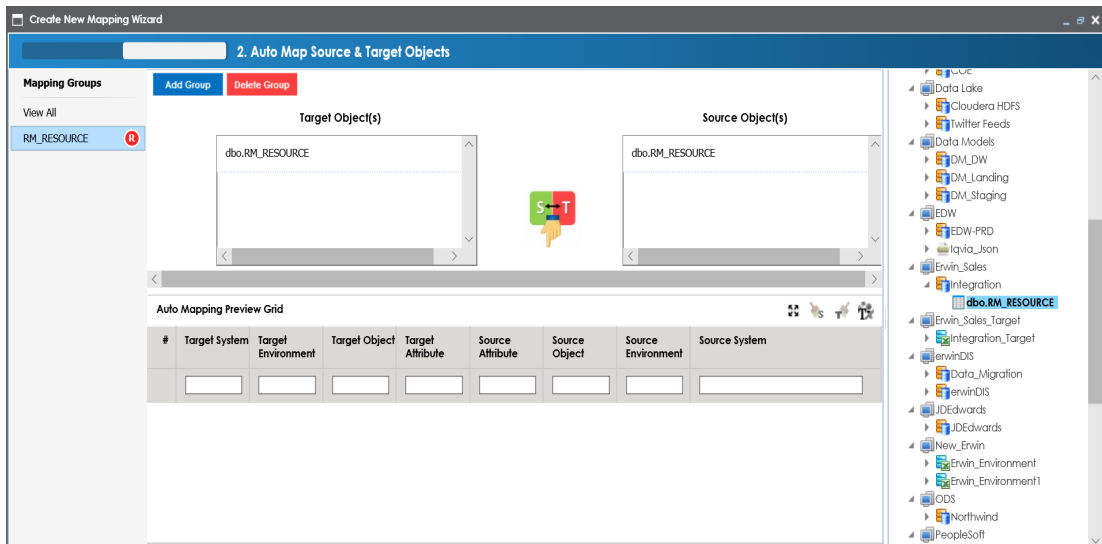
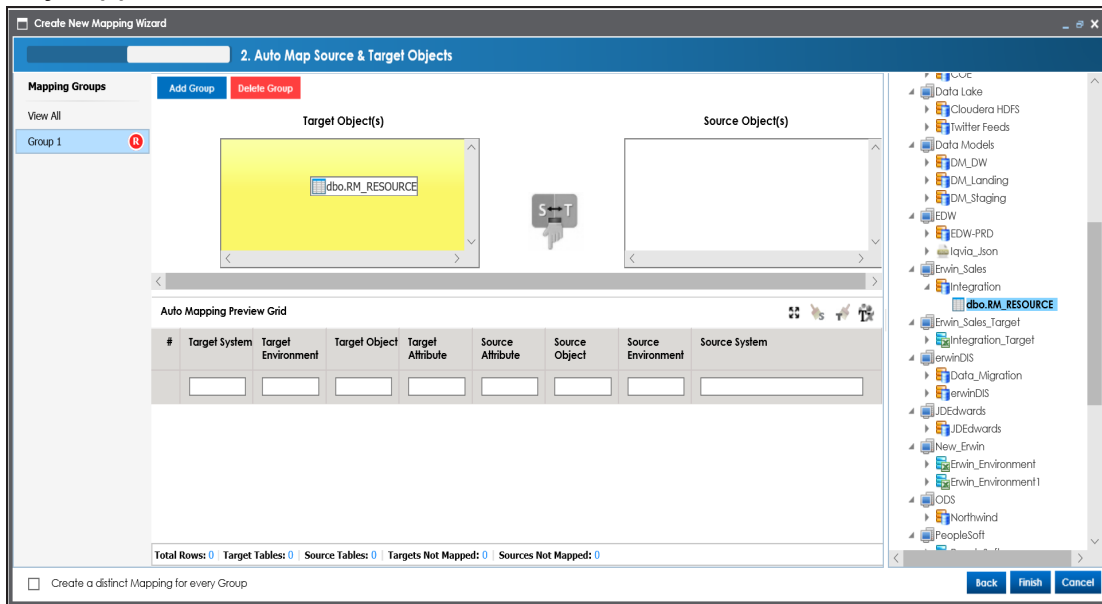
Field Name	Description
Mapping Name	Enter a unique mapping specification name.
Mapping Version	It tells about the version of the mapping specification. It is autopopulated.
Sync Source Metadata	Toggle the switch to <b>ON</b> to sync source metadata with the mapping.
Sync Target Metadata	Toggle the switch to <b>ON</b> to sync target metadata with the mapping.
Mapping Description	Enter a small description about the mapping.
Mail Comments	Enter mail comments which can be sent to the project users through an email notification. For more information on mail comments, refer to the <a href="#">Configuring Notifications</a> topic.

6. Click **Proceed with Auto Map**.

The second step in the New Mapping Wizard appears showing the source and target metadata on right pane.

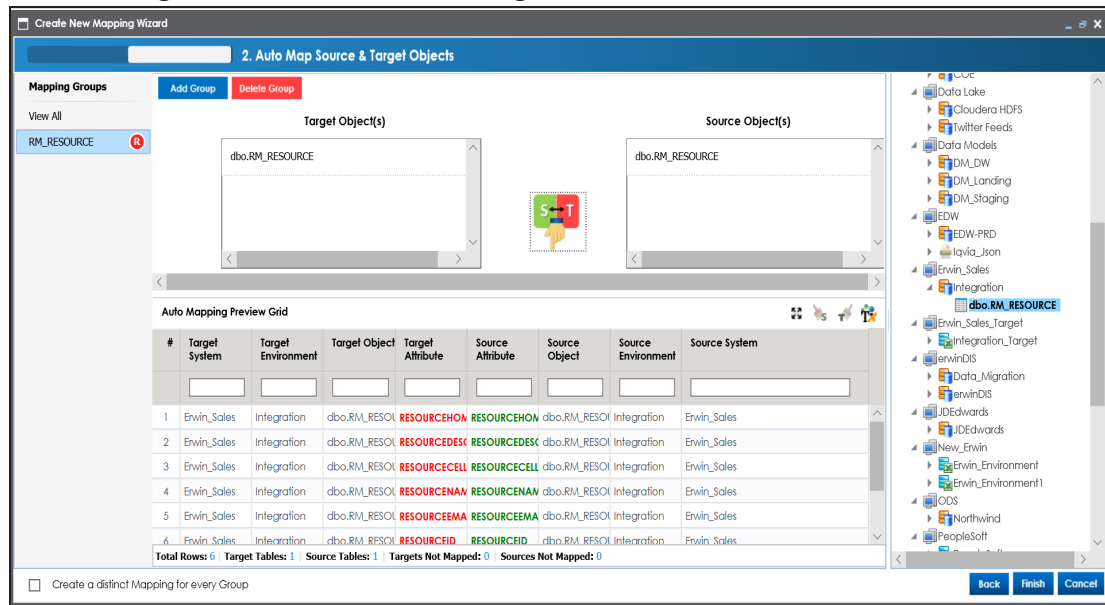


7. Drag the target table from the **Metadata** pane and drop it on **Target Object(s)** box. Similarly, drag the source table from the **Metadata** pane and drop it on **Source Object(s)** box.



## 8. Click .

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




## 9. Use the following options:

### Maximize ()

To maximize or minimize the Auto Mapping Preview Grid, click .

### Delete Orphan Sources ()

To delete source attributes which are not mapped, click .

### Delete Orphan Targets ()

To delete target attributes which are not mapped, click ()

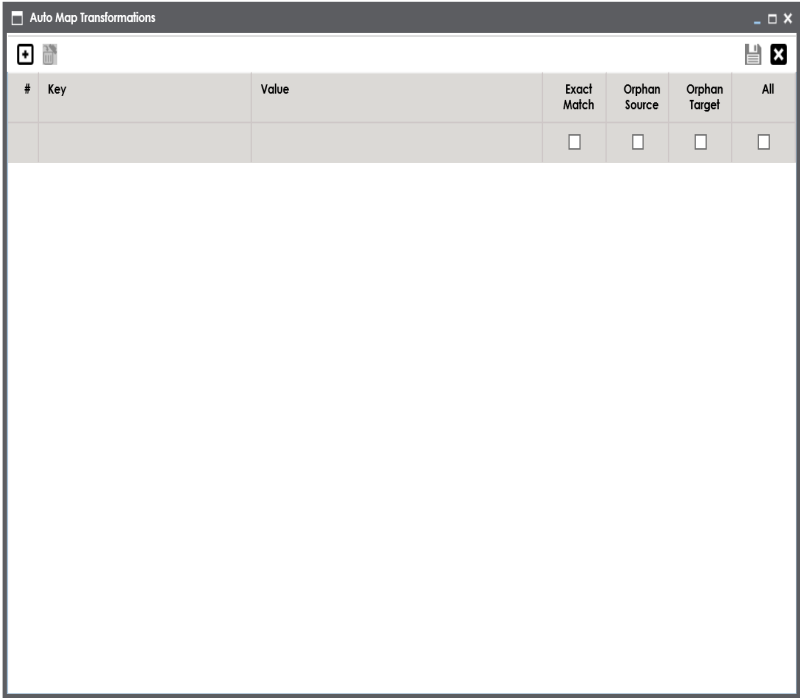
### Add Transformations ()

Use this option to add transformations for the auto map. You can add business rule, look up reference column, and trans look up condition etc.

To add transformations, follow these steps:



- 



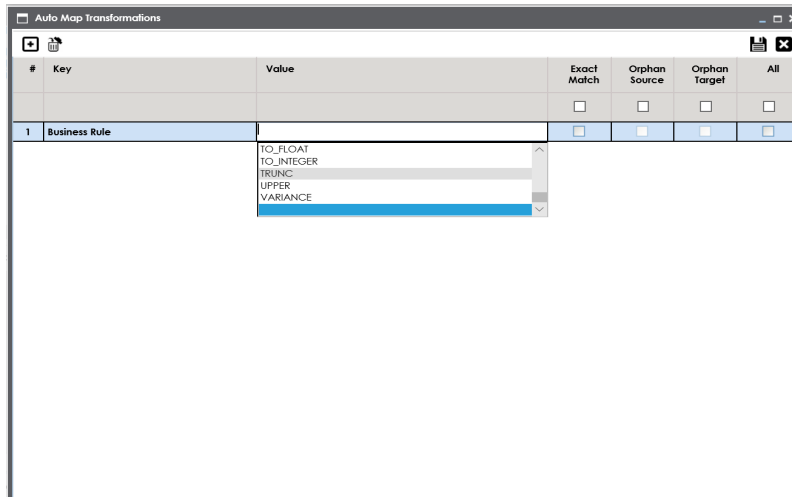
- 

A row is added to the grid.


3. Double-click the cell under the Key column and select the desired transformation.

**Note:** You can add multiple transformations. You can also define business rule for different ETL tools. For more information on how to define business rule for different ETL tools, refer to the [Defining Business Rules](#) topic.

4. Double click the cell under the Value column and provide the value.



**Note:** When you select Business Rule as a transformation, the value option appears as defined by you under the **Transformations** node. Ensure that you define business rule for the same **ETL Option** as the **Project ETL**(BODS Pseudocode, SSIS Pseudocode, Informatica Pseudocode, ODI Pseudocode or Talend Pseudocode) chosen while creating the project.

5. Select **Exact Match** check box to apply the transformation on exactly matched rows in the Auto Mapping Preview Grid.
6. Select **Orphan Source** check box to apply the transformation on orphan source rows in the Auto Mapping Preview Grid.
7. Select **Orphan Target** check box to apply the transformation on orphan target rows in the Auto Mapping Preview Grid. Select **All** checkbox to apply the transformation on every row in the Auto Mapping Preview Grid.
8. Click .

The transformations are added to the auto map.

### Add Group

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

### Rename Mapping Group ()

Use this option to rename a mapping group. To rename a mapping group, click



## Delete Group

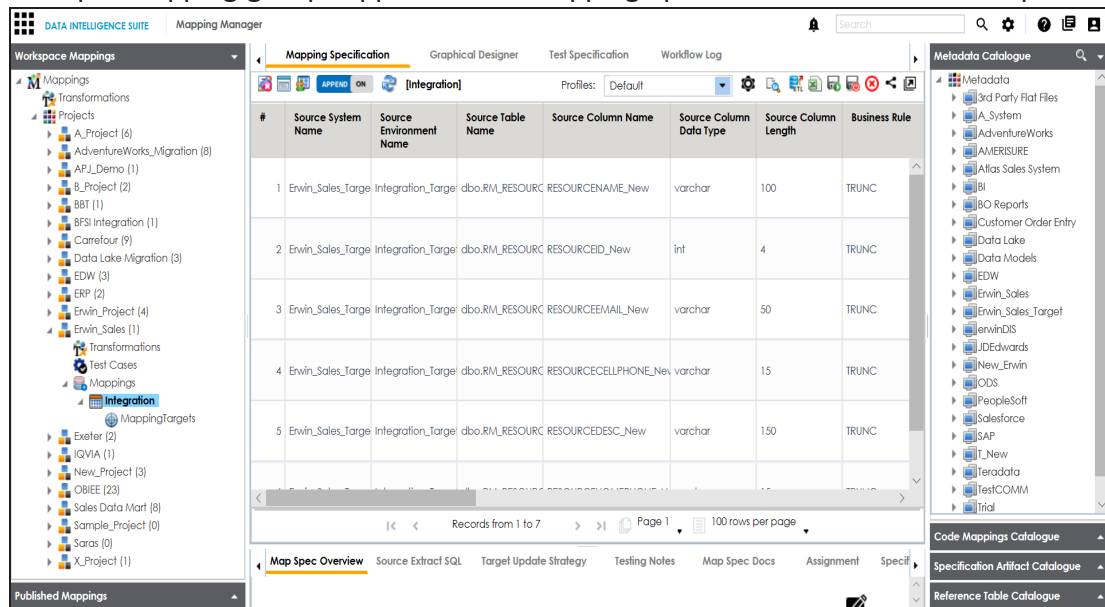
Use this option to delete a mapping group. Select a mapping group and click **Delete Group**.

## Create a distinct Mapping for every Group

Select the check box to create distinct mapping for every group.

10. Click **Finish**.

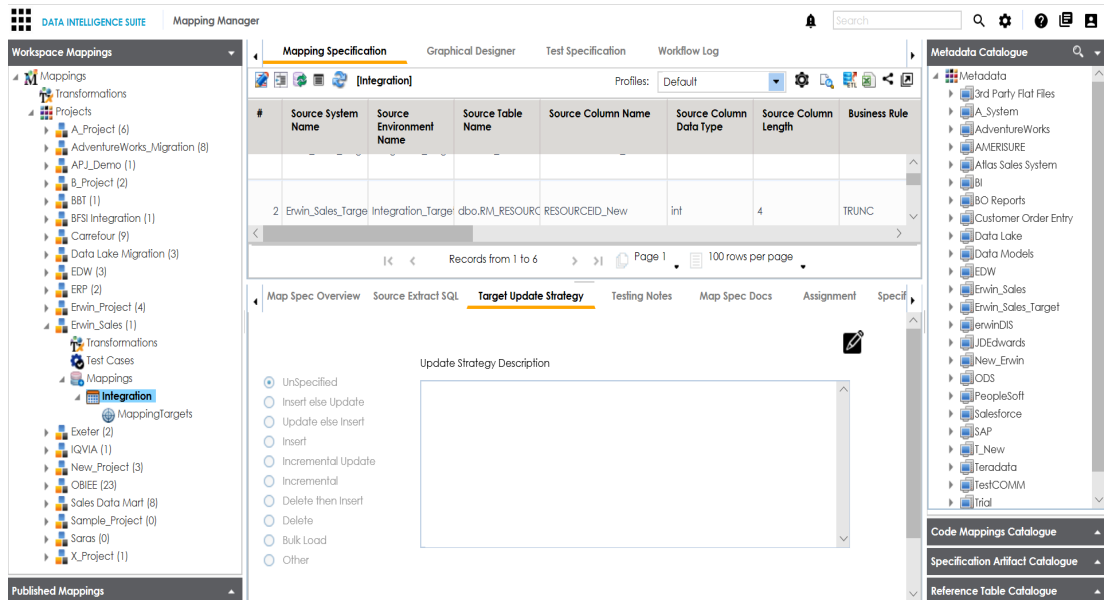
A new map is created and saved under the Mappings tree. All the auto maps in the multiple mapping groups appear in the Mapping Specification in the same sequence.



You can specify your target update strategy, depending on your project.

To specify target update strategy, follow these steps:

1. Expand the bottom pane and click the **Target Update Strategy** tab.



2. Click .

3. Select the desired strategy and type the **Update Strategy Description** in space provided.

4. Click .

The target update strategy is specified.

Once a mapping specification is created, you can:

- [Add transformation and lookup details](#)
- [Associate code mappings with the mappings](#)
- [Associate reference tables with the mappings](#)
- [Link requirements with the mappings](#)
- [Analyze mappings](#)

# Creating Mapping Specifications Using Drag and Drop Technique

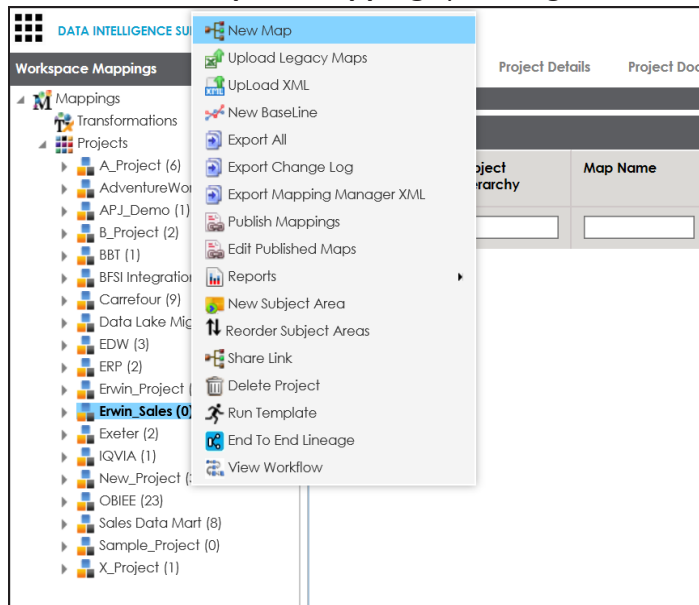
You can create mapping specifications using drag and drop method even when source column names are different from target column names.

It involves the following:

- Creating a map
- Creating mapping specification

To create maps, follow these steps:

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



3. Click **New Map**.

The New Mapping Wizard page appears.

The screenshot shows the 'New Mapping Wizard' window with the title '1. Create a New Mapping'. The fields and their values are as follows:

Field	Value
Mapping Name*	
Mapping Version	1.00
Version Label	
Sync Source Metadata	OFF
Sync Target Metadata	OFF
Job Name XRef	
Mapping Description	

At the bottom right, there are three buttons: 'Proceed with Auto Map' (green), 'Finish' (blue), and 'Cancel' (blue).

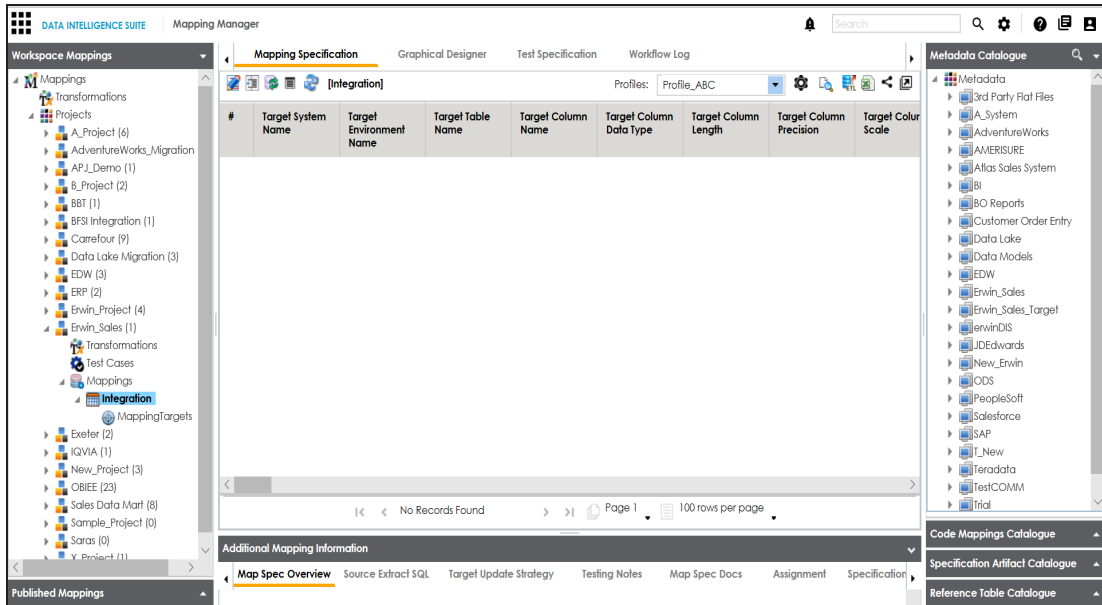
4. Enter appropriate values to the fields. Fields marked with red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Mapping Name	Enter a unique mapping specification name.
Mapping Version	It tells about the version of the mapping specification. It is autofilled.
Sync Source Metadata	Toggle the switch to <b>ON</b> to sync source metadata with the mapping.
Sync Target Metadata	Toggle the switch to <b>ON</b> to sync target metadata with the mapping.
Mapping Description	Enter a small description about the mapping.
Mail Comments	Enter mail comments which can be sent to the project users through an email notification. For more information on mail comments, refer to the

Field Name	Description
	<a href="#">Configuring Notifications</a> topic.

5. Click **Finish**.

A new map is created and saved in the mappings tree. The **Mapping Specification** appears in the center pane. The **Metadata Catalogue** appears on right pane. The Source and Target Metadata are available in the **Metadata Catalogue**.



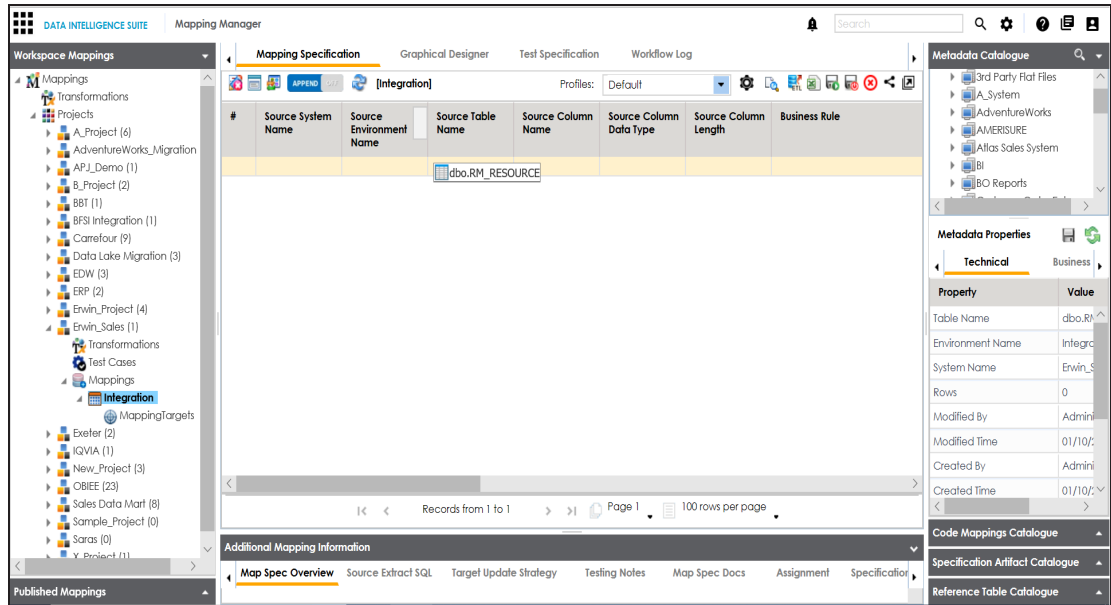
To create mapping specifications using drag and drop method, follow these steps:

1. Click .

Now, you can edit **Mapping Specification** page.

2. Drag source table or column from **Metadata Catalogue** and drop in **Mapping Specification**.

**Note:** You cannot drop source system or source environment in the Mapping Specification. You should drop source table or column under the respective columns.

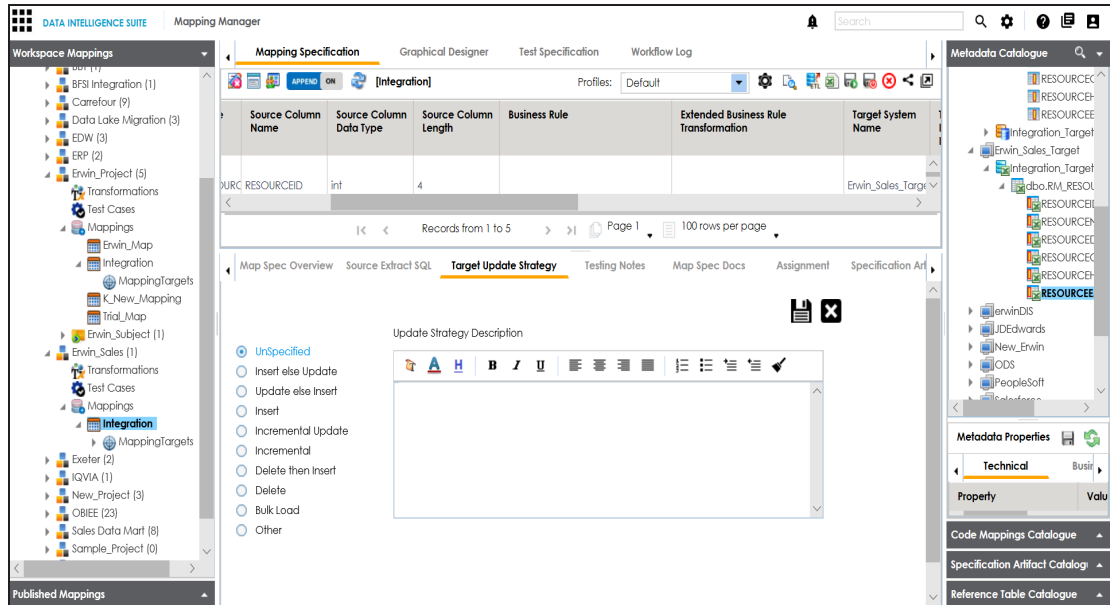





3. Drag target table or column from the **Metadata Catalogue** and drop in the **Mapping Specification**.

**Note:** You cannot drop target system or target environment in the Mapping Specification. You should drop target table or column under the respective columns.

4. Expand the bottom pane and click **Target Update Strategy**.





5. Click .
6. Select the appropriate option and click .
7. Click .

The source to target mapping is saved.

Once a mapping specification is created, you can:

- [Add transformation and lookup details](#)
- [Associate code mappings with the mappings](#)
- [Associate reference tables with the mappings](#)
- [Link requirements with the mappings](#)
- [Analyze mappings](#)

## Creating Mapping Specifications Graphically

You can use graphical method to create mapping specifications when:

- Columns in source metadata and target metadata have same names
- Columns in source metadata and target metadata have different names.

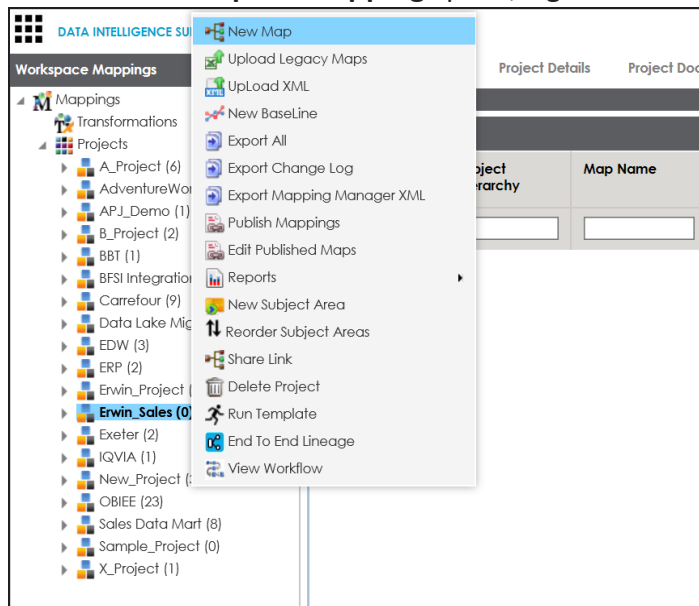
You can add transformation and lookup details graphically to the mapping specifications. You can also use user-defined fields for adding transformations.

It involves the following:

- Creating maps
- Creating mapping specifications when:
  - Source column names and target column names are same
  - Source column names and target column names are different
- Adding transformation details to mapping specifications
- Adding lookup details to mapping specification

To create maps, follow these steps:

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



3. Click **New Map**.

The New Mapping Wizard page appears.

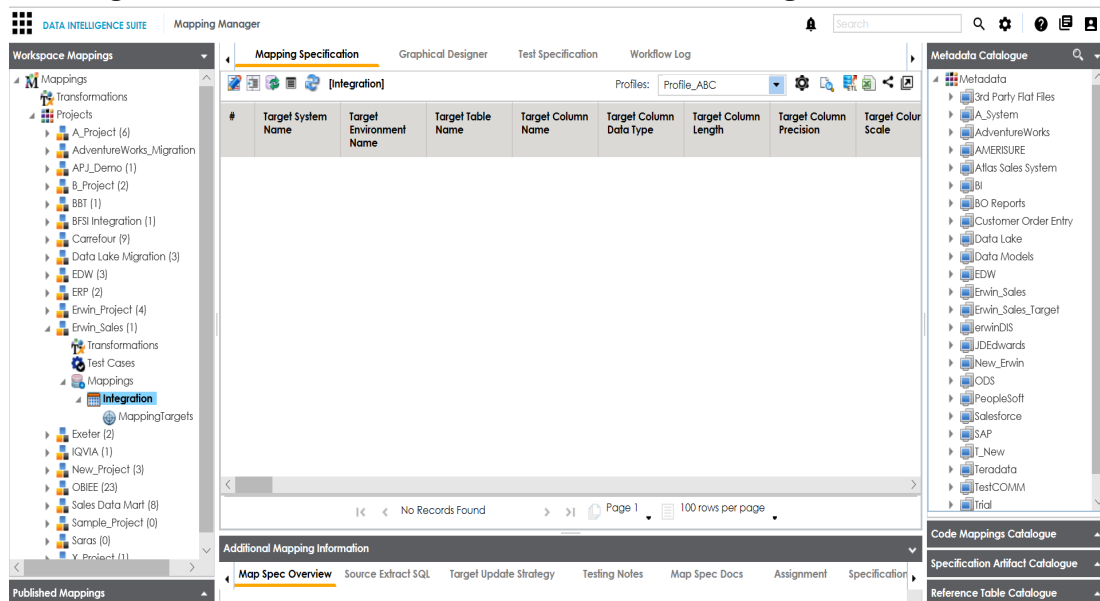
4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Mapping Name	Enter a unique mapping specification name.
Mapping Version	It tells about the version of the mapping specification. It is autofilled.
Sync Source Metadata	Toggle the switch to <b>ON</b> to sync source metadata with the mapping.
Sync Target Metadata	Toggle the switch to <b>ON</b> to sync target metadata with the mapping.
Mapping Description	Enter a small description about the mapping.
Mail Com-	Enter mail comments which can be sent to the project users through an

Field Name	Description
ments	email notification. For more information on mail comments, refer to the <a href="#">Configuring Notifications</a> topic.

5. Click **Finish**.

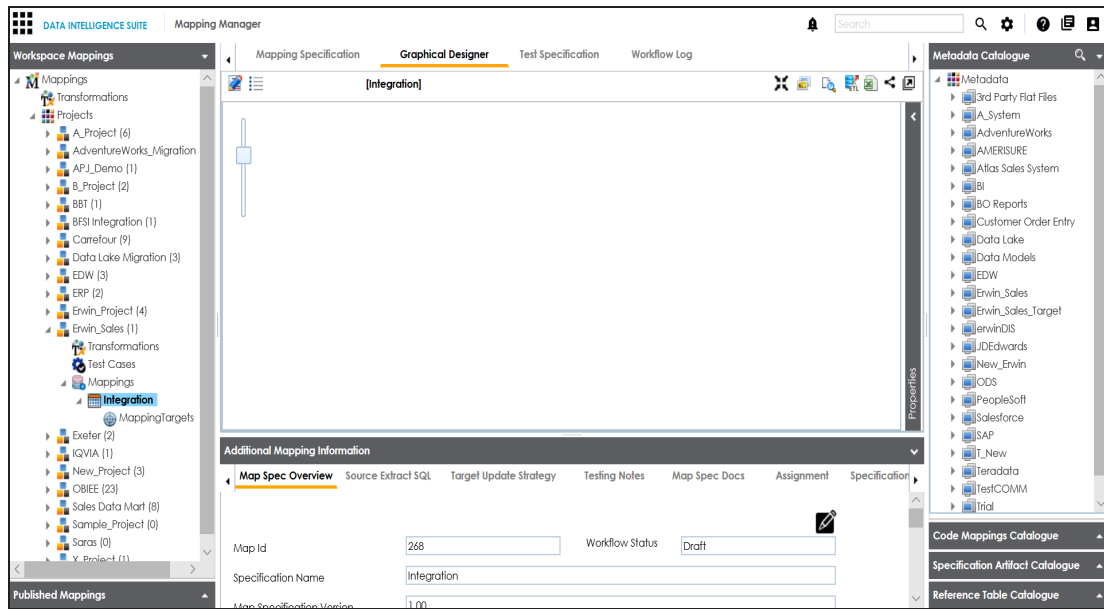
A new map is created and saved in the mappings tree. The **Mapping Specification** appears in center pane. The **Metadata Catalogue** appears in right pane. The Source and Target Metadata are available in the **Metadata Catalogue**.




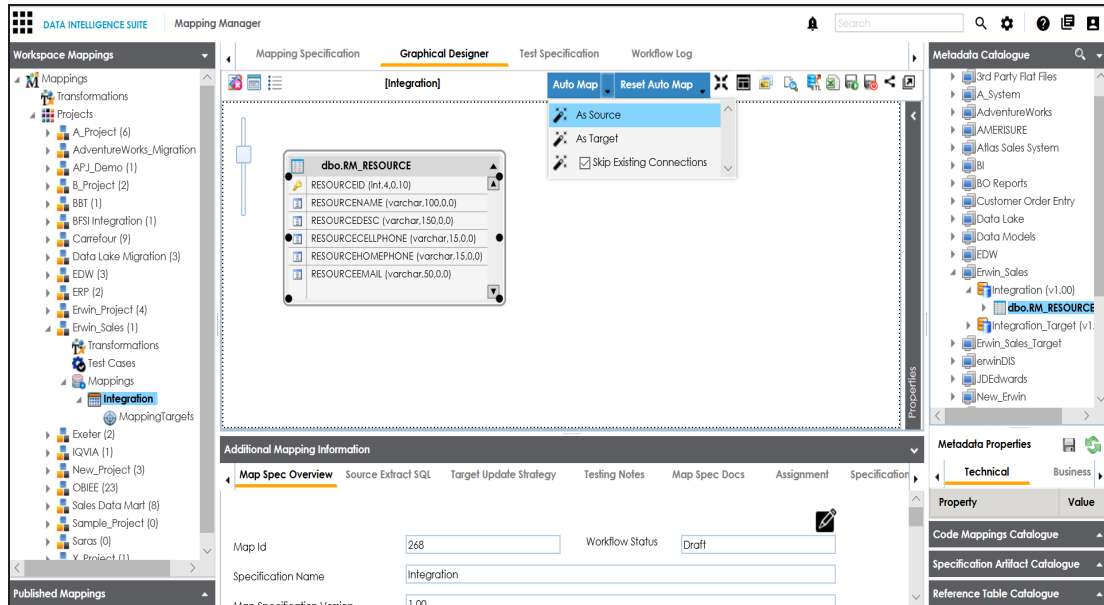
To create mapping specifications when source and target have same column names, follow these steps:

1. Click the desired map.
2. Click the **Graphical Designer** tab.

The following page appears.

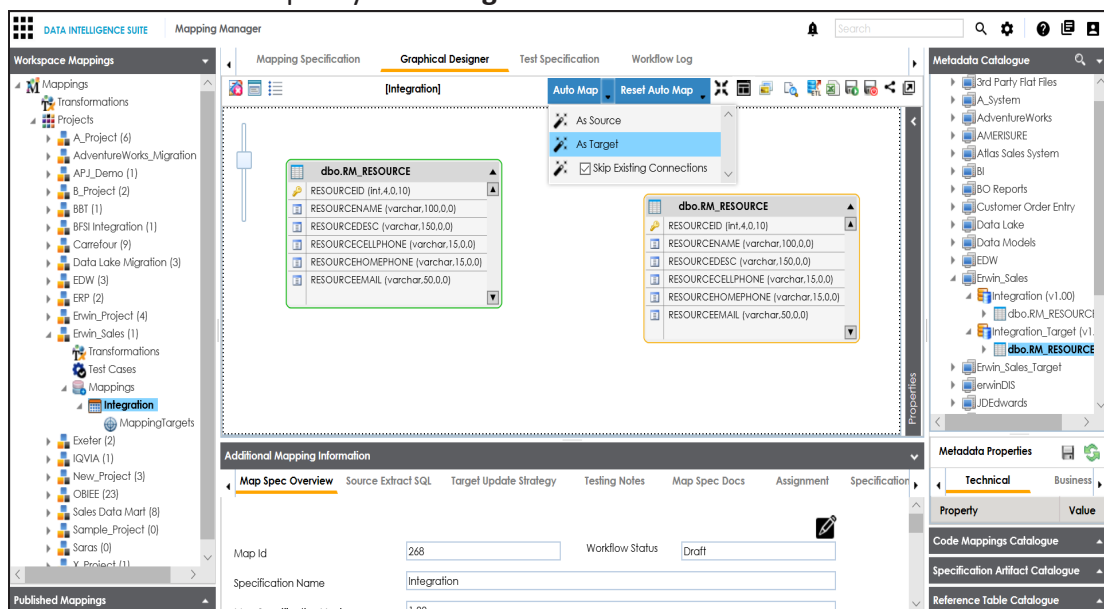


3. Click .
4. Expand the desired system nodes in the **Metadata Catalogue**.
5. Expand the desired environment nodes in the **Metadata Catalogue**.
6. Drag and drop source table.
7. Select the table and specify it **As Source**.



8. Drag and drop the target table.

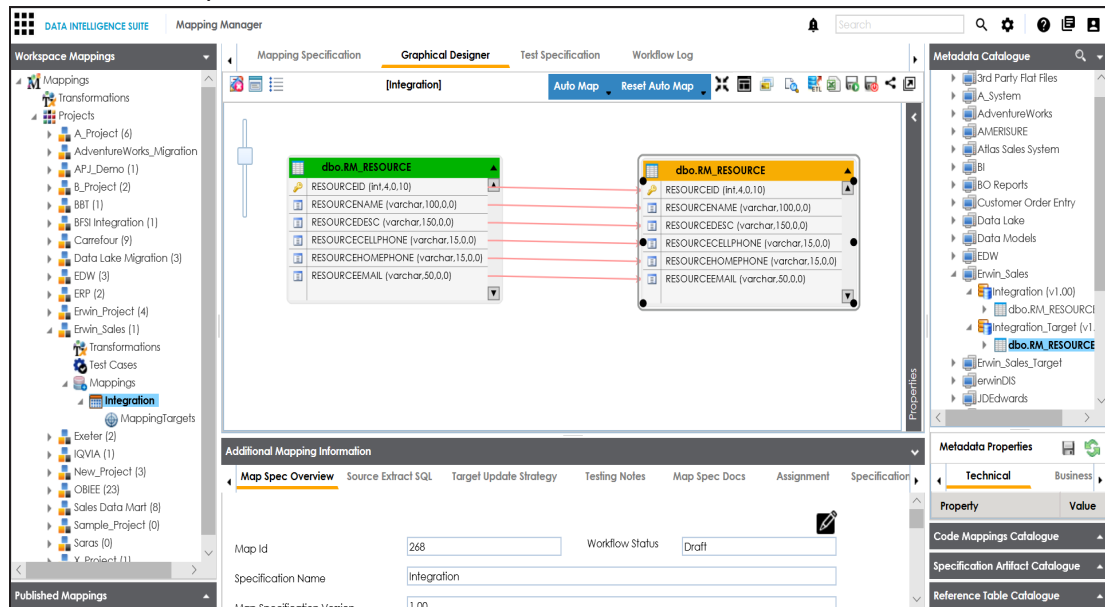
9. Select the table and specify it **As Target**.




10. Click **Auto Map**.

The source and target columns are mapped and a mapping specification is created.

**Note:** Auto Map can be used when the column names are identical.



11. Expand the bottom pane, click the **Target Update Strategy** tab and click .

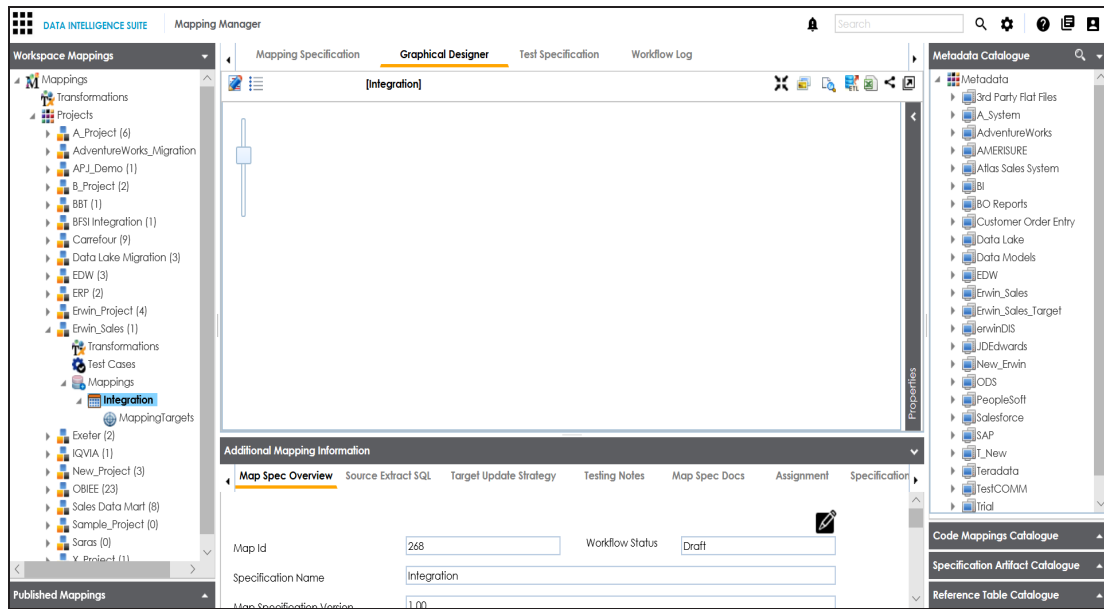
12. Select the appropriate option to set the target update strategy and click .


The mapping specification is updated with the target strategy.

To create mapping specifications when source columns and target columns have different names, follow these steps:

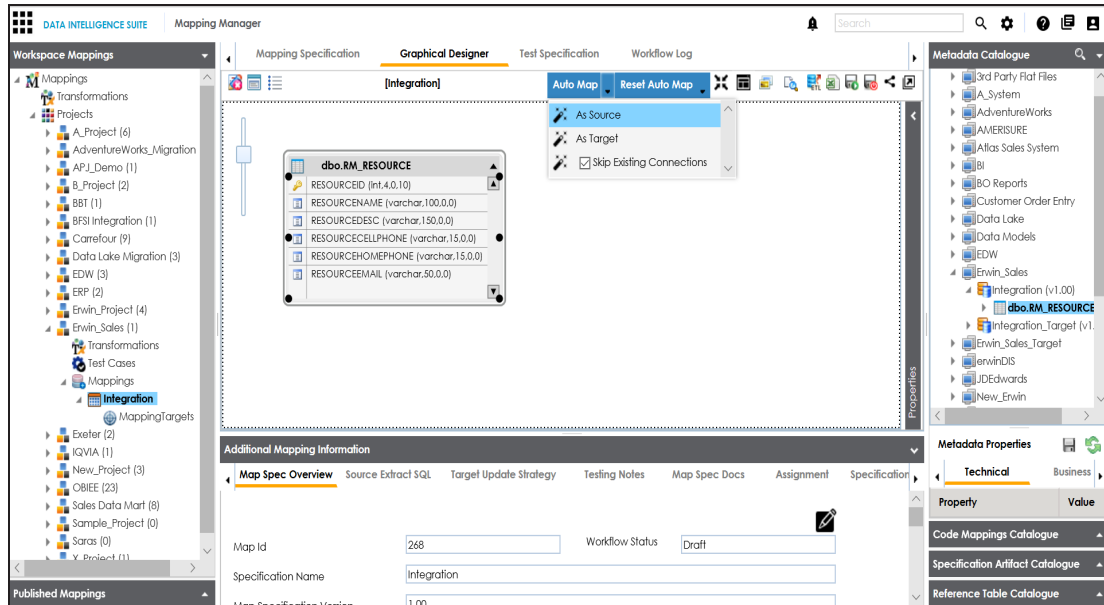
1. Click the desired map.
2. Click the **Graphical Designer** tab.

The following page appears.

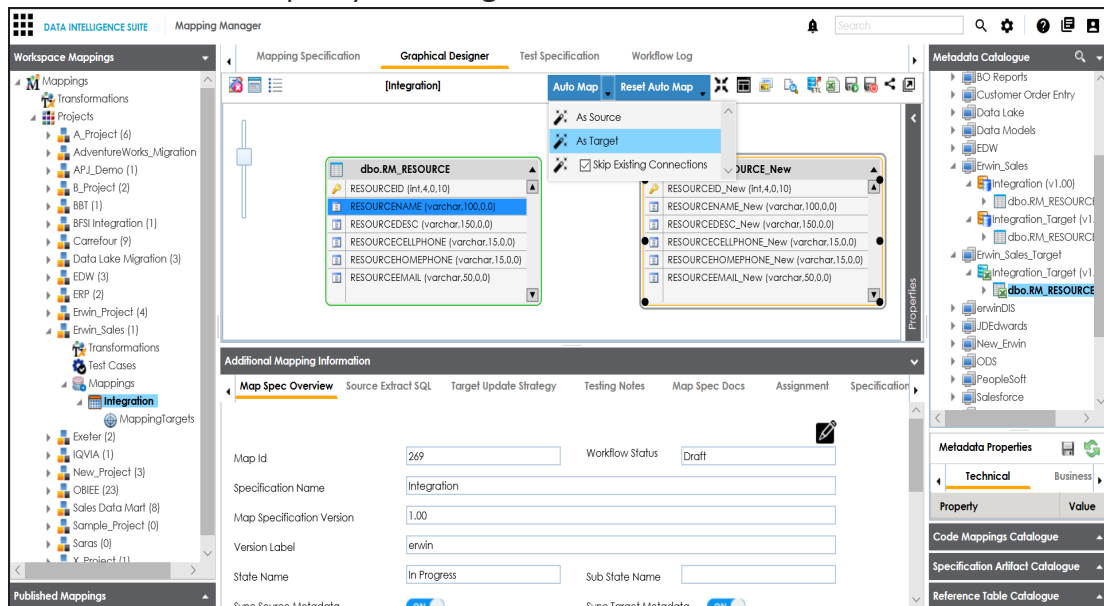


3. Click .
4. Expand the source system node and the source environment node in the **Metadata Catalogue**.
5. Drag and drop the source table.
6. Select the table and specify it **As Source**.

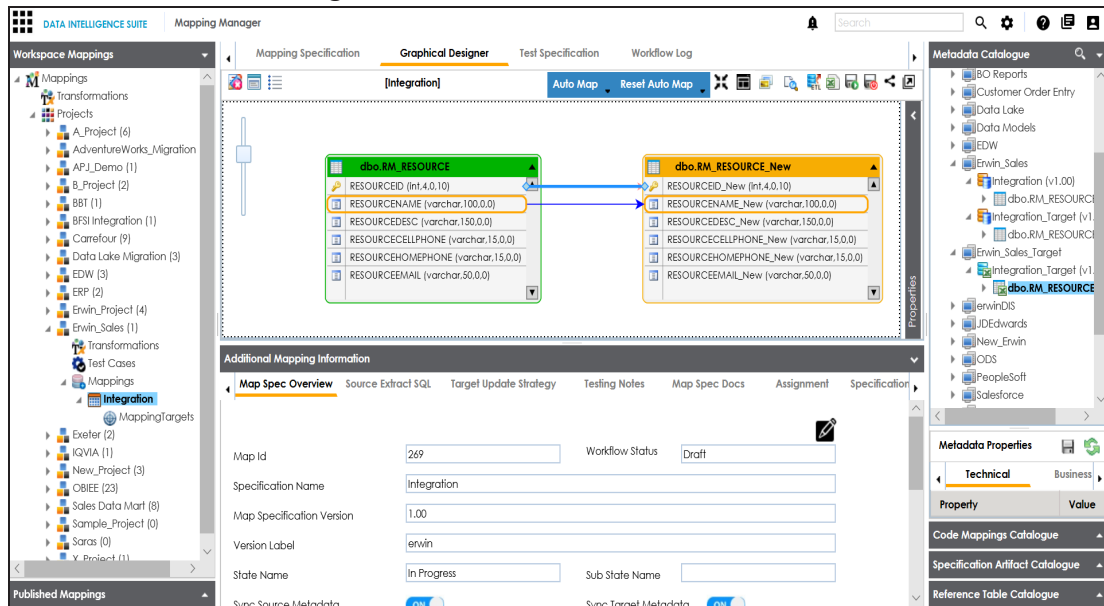







7. Expand the target system node and the target environment node.
8. Drag and drop the target table.
9. Select the table and specify it **As Target**.



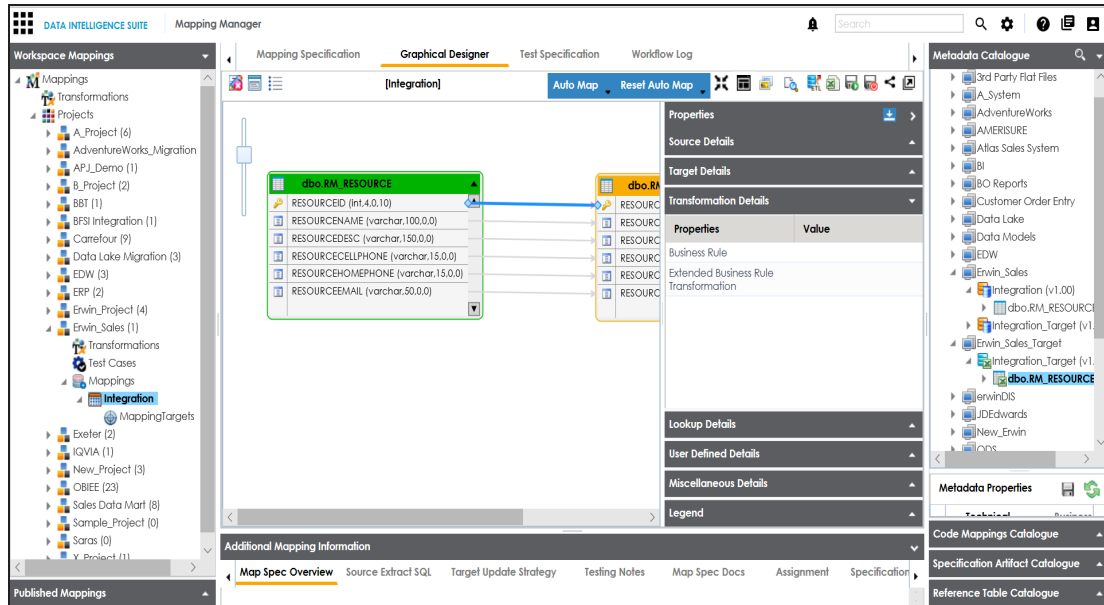
- Match the source columns to target columns by dragging the mouse from respective source column to the target column.



- Expand the bottom pane, click the **Target Update Strategy** tab and click .
- Select the appropriate option to set the target update strategy and click .
- Click .

To add transformation details graphically, follow these steps:

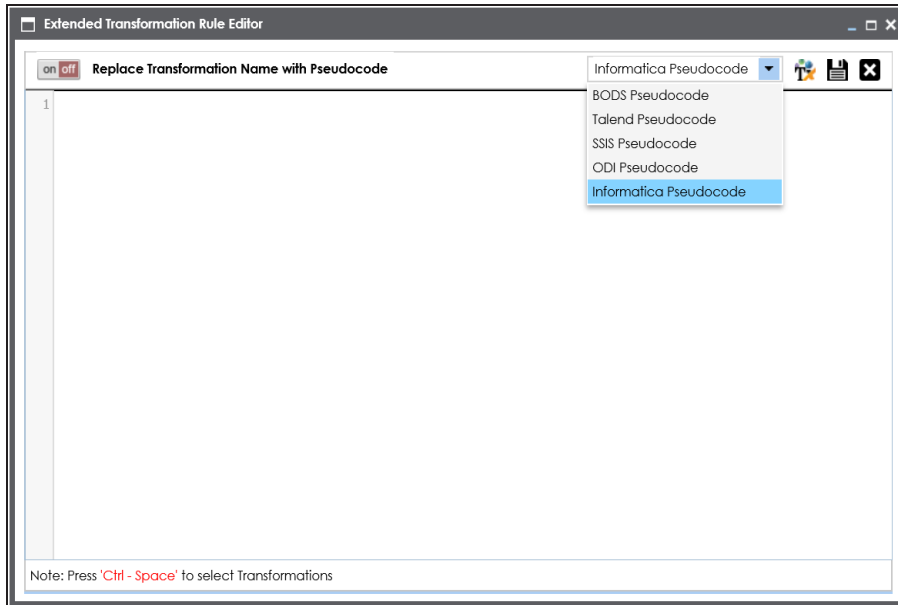
- Click the mapping link of the desired column and expand the **Properties** side deck.
- Expand the **Transformation Details** tab.



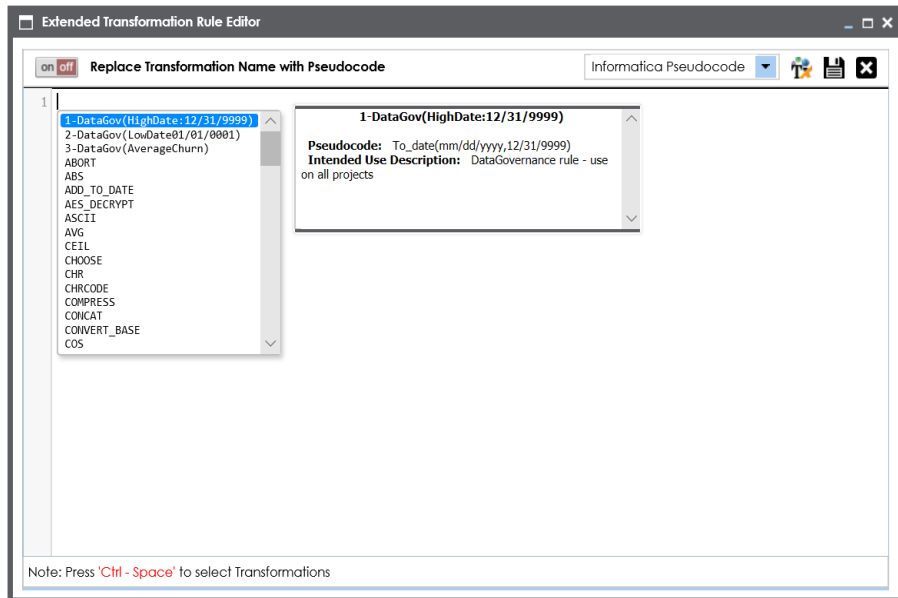
3. Double-click the cell against the **Business Rule** and select the desired value.


**Note:** Ensure that you defined business rule under the **Transformations** node for the same **ETL Option** as that of **Project ETL** option (BODS Pseudocode, SSIS Pseudocode, Informatica Pseudocode, ODI Pseudocode or Talend Pseudocode) while creating the project.



4. Double-click the cell against the **Extended Business Rule Transformation**.
5. Select the pseudocode based on the **Project ETL**.



6. Press Ctrl-Space.



**Note:** If the desired transformation is not available in the list, use  to create and update the transformations list.

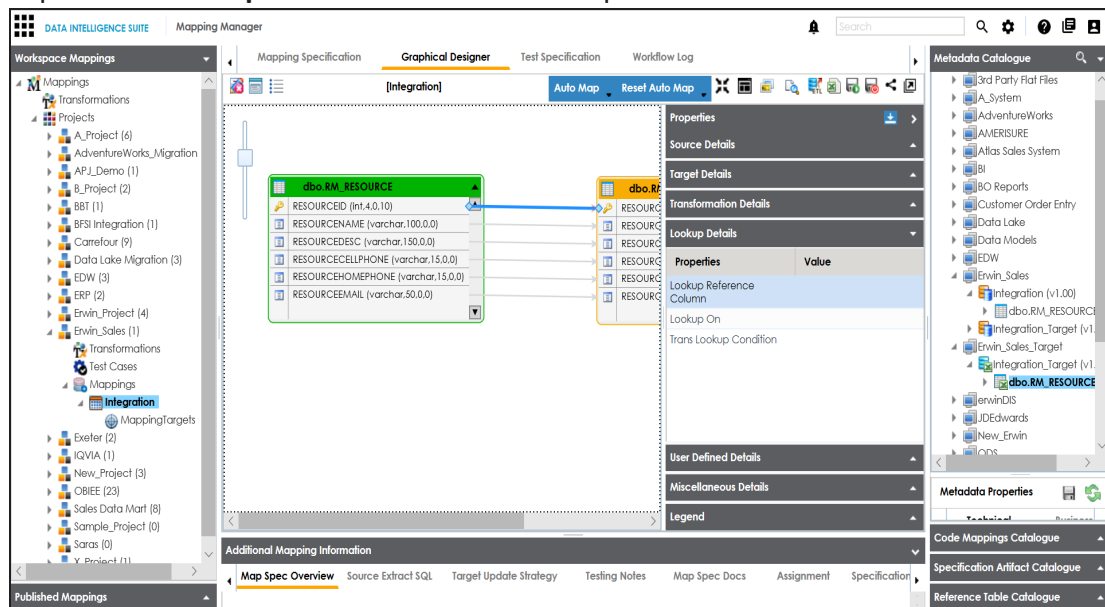
7. Double-click the desired transformation to select it.
8. Toggle the switch  to ON to replace transformation name with pseudocode.
9. Click .

The extended business rule transformation is added to the source column. Similarly, you can use user defined fields, for more information on configuring UI labels for the user defined fields, refer to the [Configuring Language Settings](#) topic.

**Note:** You can add extended business rule transformation to multiple source columns.

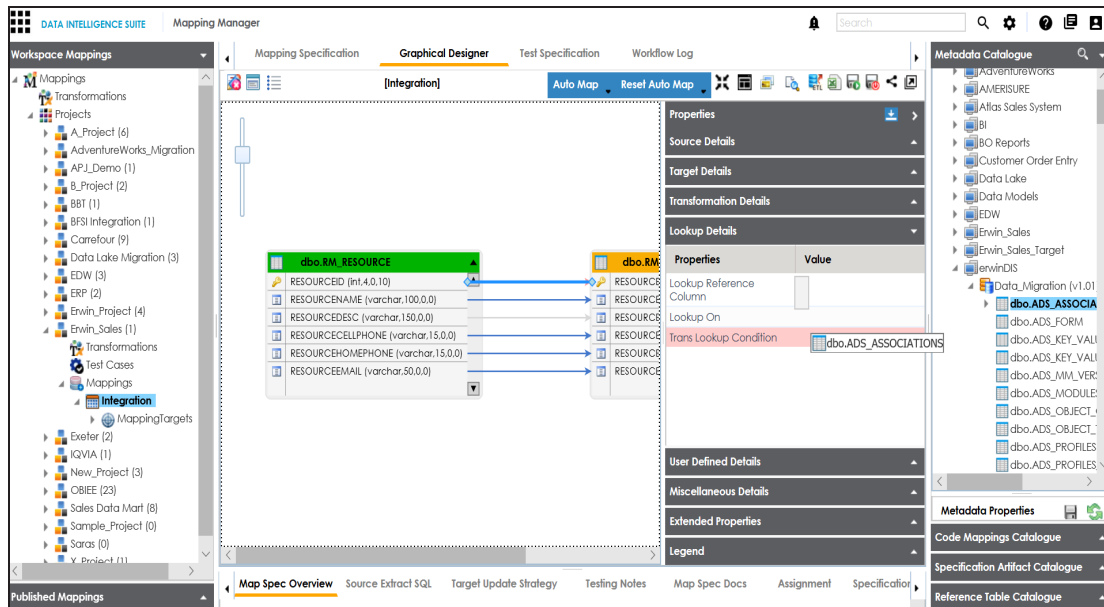
To add lookup details graphically, follow these steps:

1. Expand the **Lookup Details** tab to enter lookup details for the selected columns.

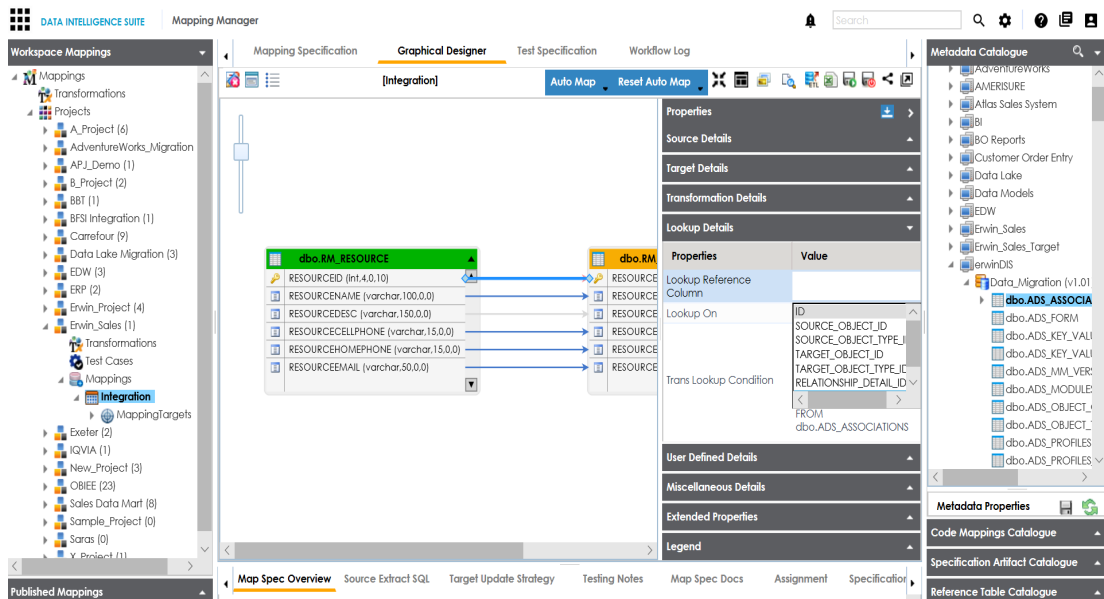


2. Drag the desired table from the Metadata Catalogue and drop it against the **Trans Lookup Condition**.

**Note:** You can scan the desired table in the Metadata Manager to make it available in the Metadata Catalogue.



3. Double click the cell against Lookup Reference Column and select the desired option.



4. Similarly, double-click the cell against the Lookup On and select the desired option.

5. Click .

The mappings specifications are saved.

Once a mapping specification is created, you can:

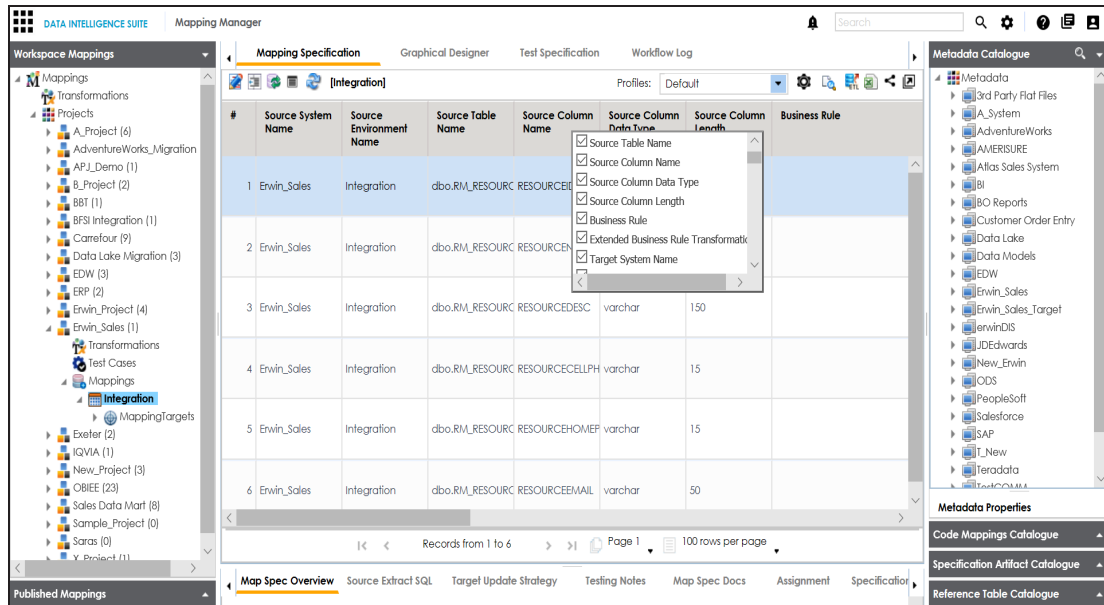
- [Associate code mappings with the mappings](#)
- [Associate reference tables with the mappings](#)
- [Link requirements with the mappings](#)
- [Analyze mappings](#)

## Adding Transformation and Lookup Details

You can add business rules or extended business rules and enter lookup details for the desired source columns in the mapping specification.

To add transformation details to the mapping specification, follow these steps:

1. Under the **Workspace Mappings** pane, click the desired map.
2. Right-click the header menu of the Mapping Specification grid.



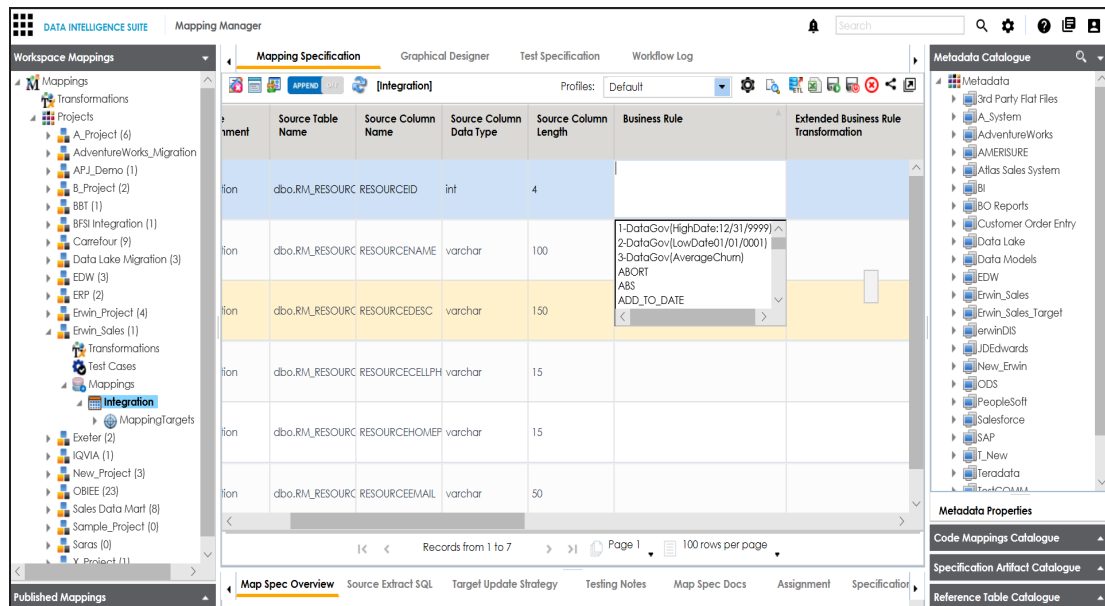
3. Select the **Business Rule** and **Extended Business Rule Transformation** check boxes.

**Note:** Selecting the check box makes the column available in the mapping specification grid.

4. Click  to edit the mapping specification grid.

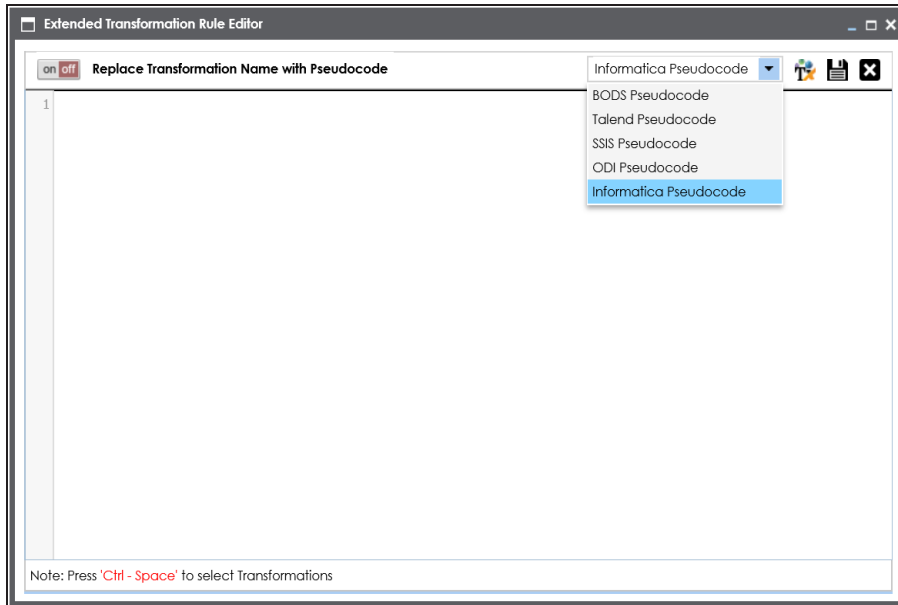
- Double-click the cell under the **Business rule** for the desired source column.

**Note:** Ensure that you define business rules under the **Transformations** node for the same **ETL Option** as the **Project ETL** option (BODS Pseudocode, SSIS Pseudocode, Informatica Pseudocode, ODI Pseudocode or Talend Pseudocode) chosen while creating the project. For more information on defining business rules, refer to the [Defining and Managing Business Rules](#) section.

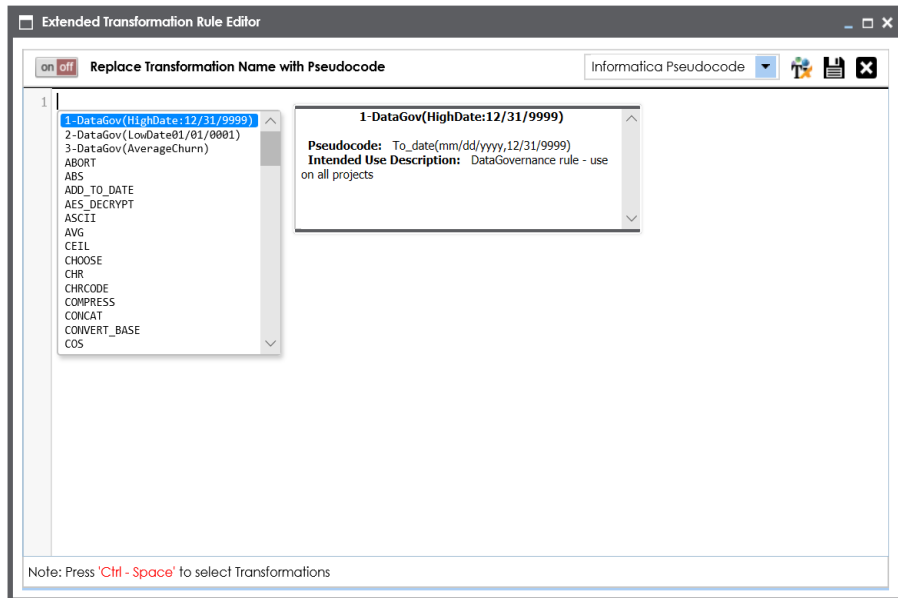



- Select the business rule from the drop down options.
- Note:** You can add business rules for multiple source columns.
- Double-click the cell under **Extended Business rule** Transformation for the desired source column.
- Select the pseudocode based on the **Project ETL**.







9. Press Ctrl-Space.



**Note:** If the desired transformation is not available in the list, use  to create and update the transformations list.

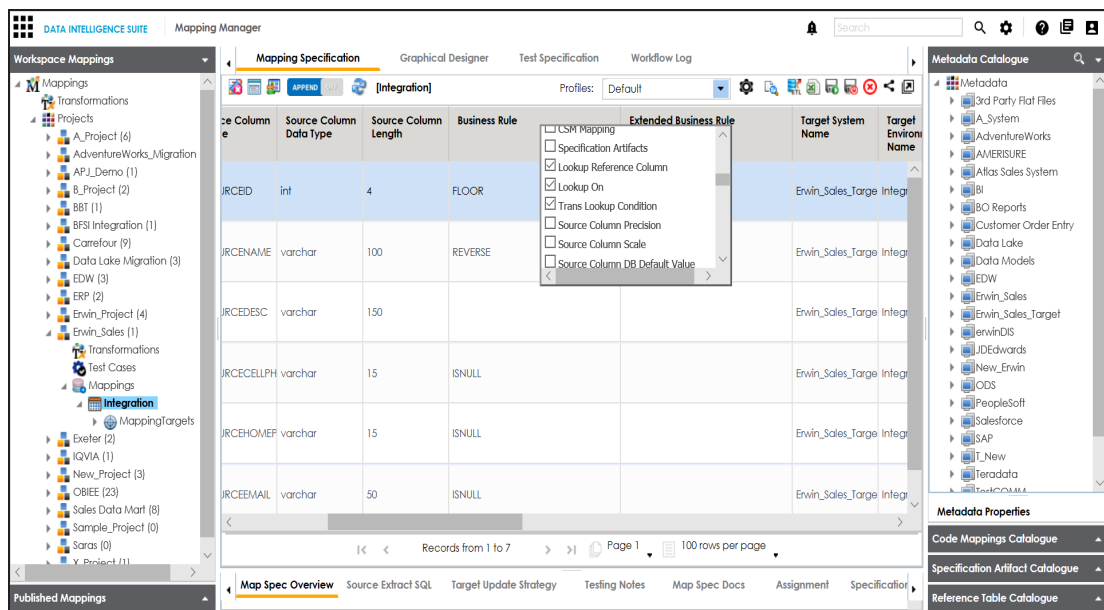
10. Double-click the desired transformation to select it.
11. Toggle the switch  to ON to replace transformation name with pseudocode.
12. Click .

The extended business rule transformation is added to the source column. Similarly, you can use user defined fields, for more information on configuring UI labels for the user defined fields, refer to the [Configuring Language Settings](#) topic.

**Note:** You can add extended business rule transformation to multiple source columns.

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

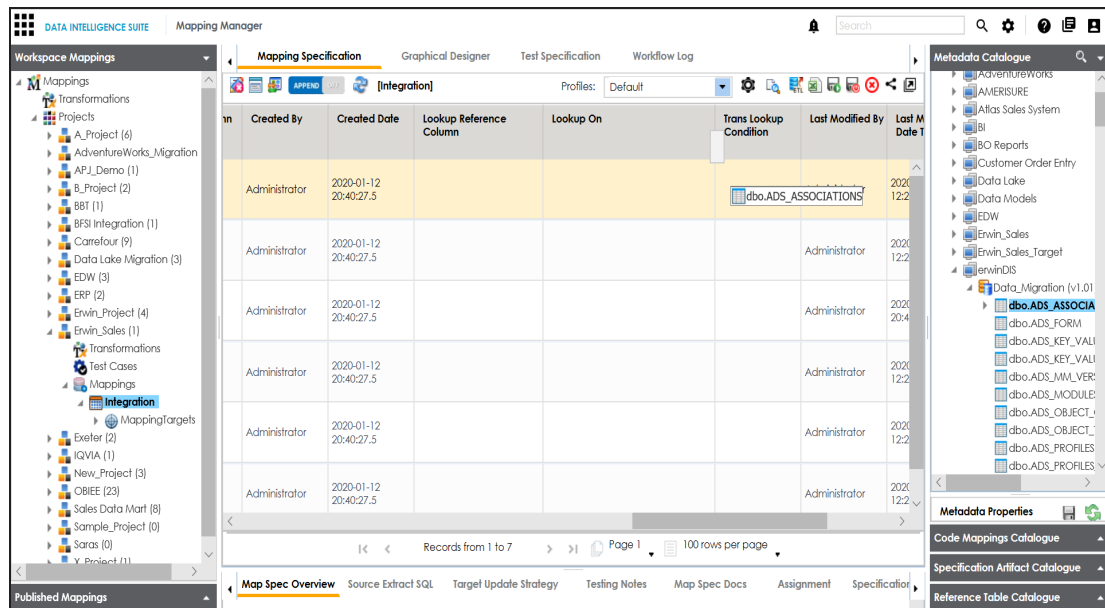
1. Under the **Workspace Mappings** pane, right-click the header menu of the mapping specification grid.
2. Select the Lookup Reference Column, Lookup On, and Trans Lookup Condition check boxes.



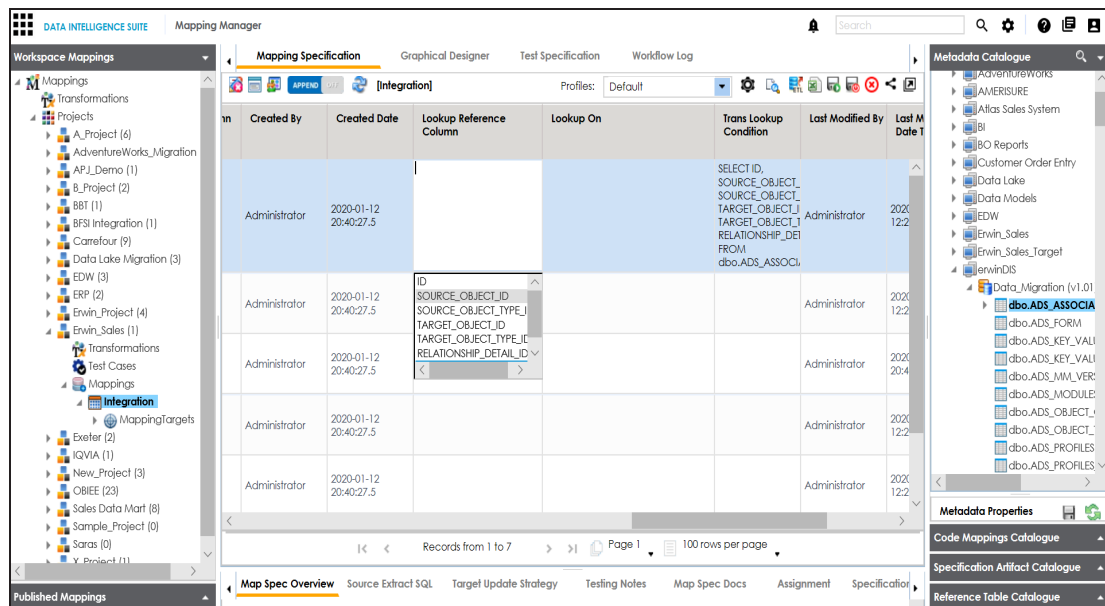
3. Drag the desired table from the Metadata Catalogue and drop it under the **Trans Lookup Condition** column for the desired source column.

The SQL query populates.

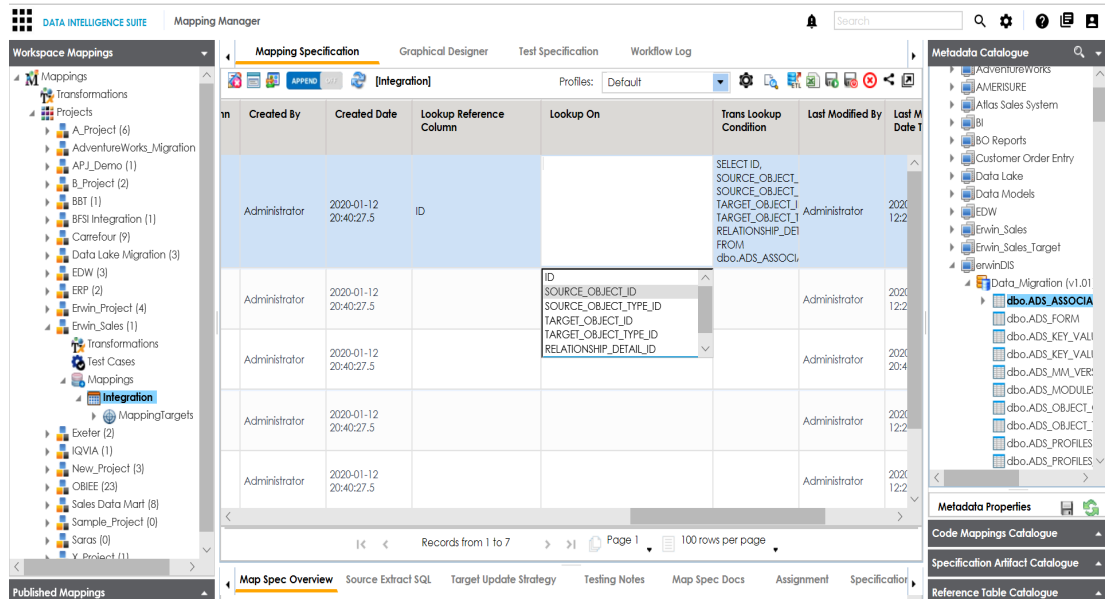
**Note:** You need to scan the desired table using the Metadata Manager to make it available under the Metadata Catalogue.



4. Double-click the cell under the **Lookup Reference Column** and select the desired column.



5. Double-click the cell under the **Lookup On** and select the desired column.



**Note:** You can add lookup details for multiple source columns.

6. Click .

The lookup details are updated in the Mapping Specification.

## Updating Mapping Specifications Manually

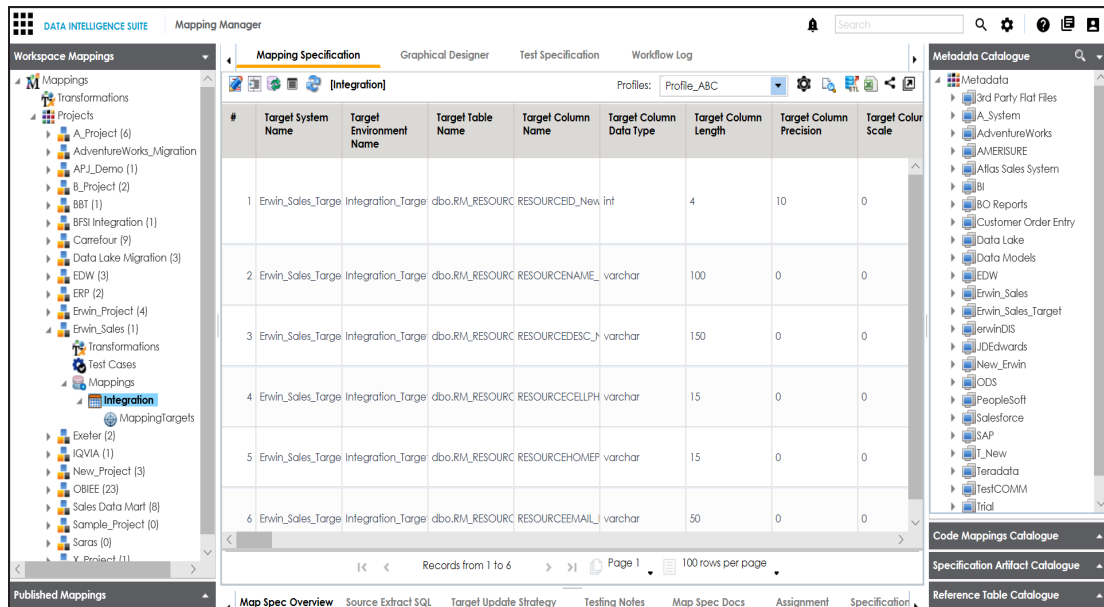
Manual entry of mapping specifications should be used case by case and on exception basis.

After creating mapping specifications, you can update mapping specifications manually.

To update mapping specifications manually, follow these steps:

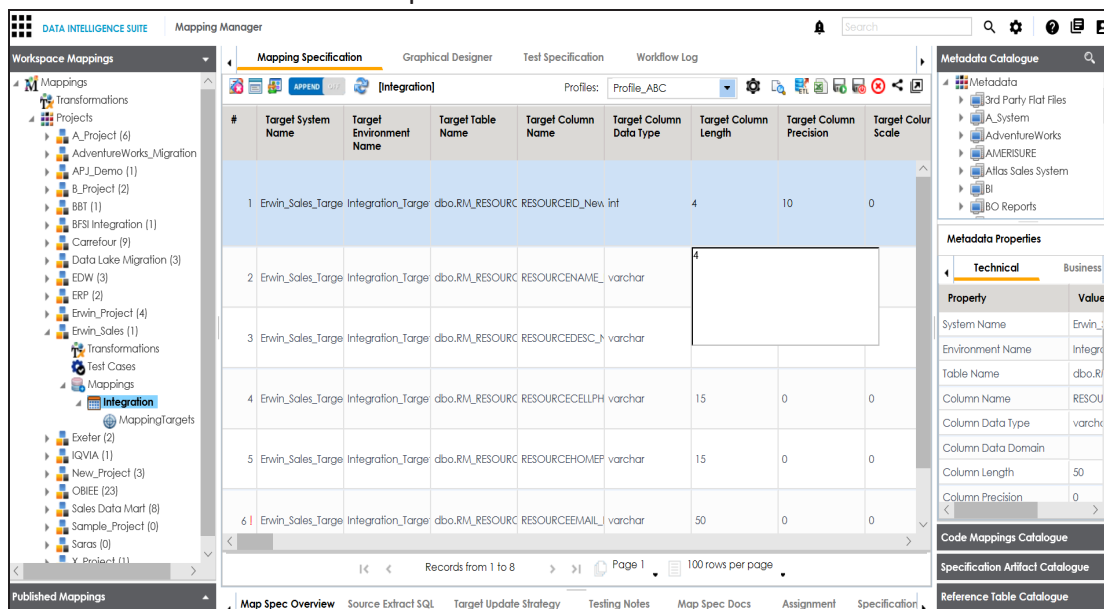
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project node.
3. Click the desired map.

The Mapping Specification grid appears.

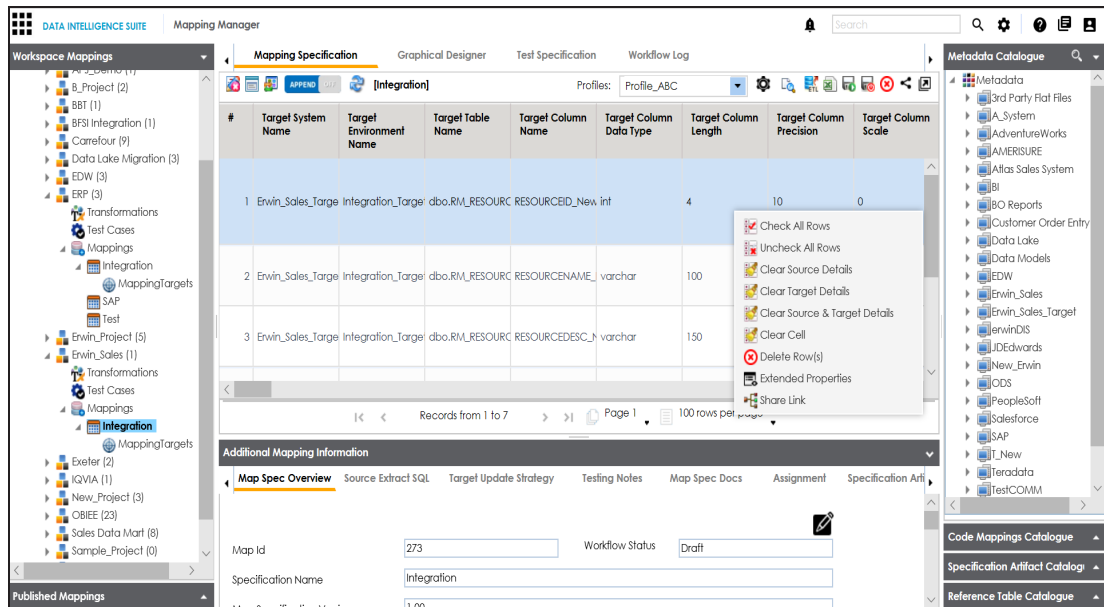


4. Click .

5. Double-click a desired cell to update its value.



6. Select a row (use Ctrl key to select multiple rows) in the Mapping Specification and right-click a desired cell.



7. Use the following options:

### Check All Rows

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

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

### Uncheck All Rows

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

### Clear Source Details

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

### Clear Target Details

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

### Clear Source & Target Details

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

### Clear Cell

Use this option to clear the cell.

### Delete Row(s)

Use this option to delete the selected rows.

### Extended Properties

Use this option to configure Extended Properties.

### Share Link

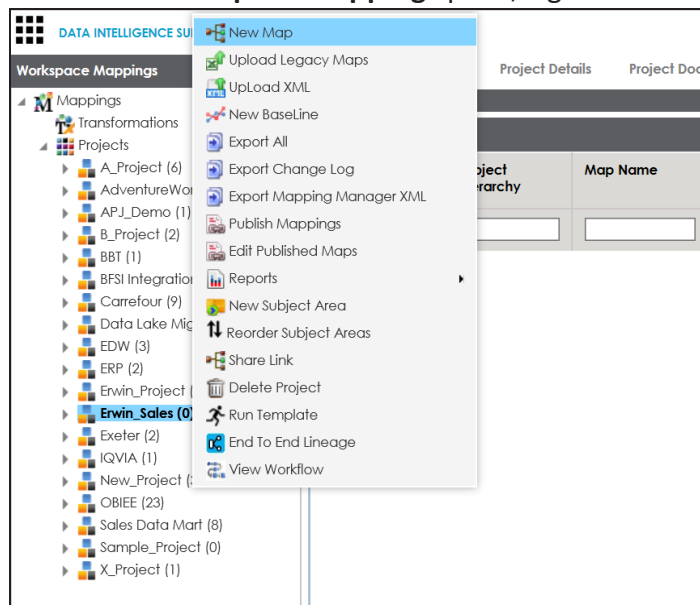
Use this option to copy or share the url of the mapping specification.

## Creating One to Many and Many to Many Mapping Specifications

Mapping Manager enables you to perform one to many, and many to many mapping relationships at row level. You can map multiple source columns to single or multiple target columns.

To create maps, follow these steps:

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



- Click **New Map**.

The New Mapping Wizard page appears.

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

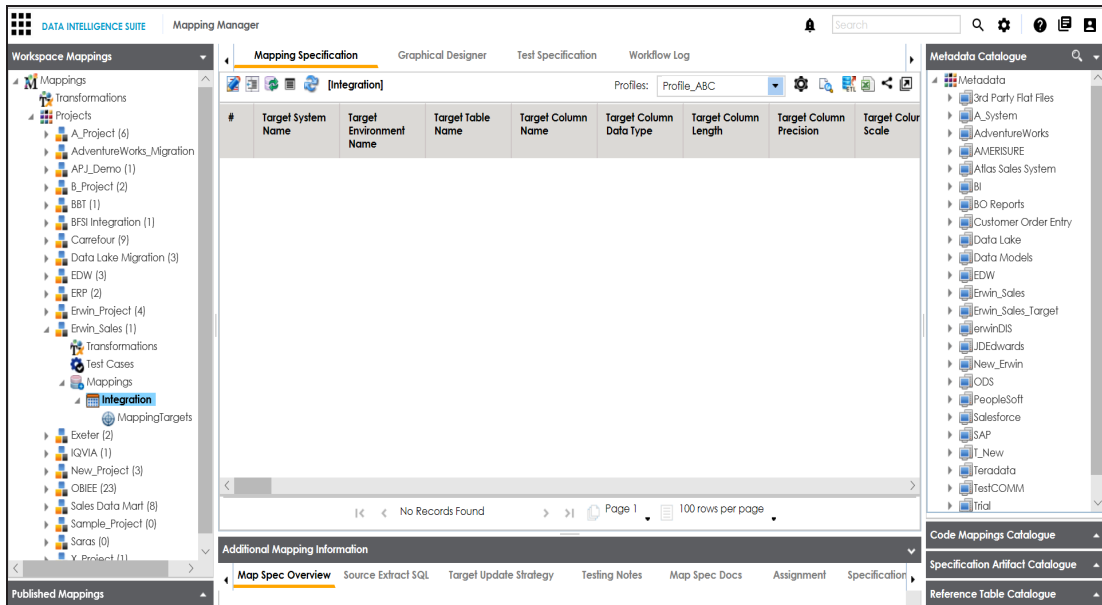
Field Name	Description
Mapping Name	Enter a unique mapping specification name.
Mapping Version	It tells about the version of the mapping specification. It is autofilled.
Sync Source Metadata	Toggle the switch to <b>ON</b> to sync source metadata with the mapping.
Sync Target Metadata	Toggle the switch to <b>ON</b> to sync target metadata with the mapping.
Mapping Description	Enter a small description about the mapping.





Field Name	Description
Mail Comments	Enter mail comments which can be sent to the project users through an email notification. For more information on mail comments, refer to the <a href="#">Configuring Notifications</a> topic.

5. Click **Finish**.

A new map is created and saved in the mappings tree. The **Mapping Specification** appears on center pane. The **Metadata Catalogue** appears on the right pane. The Source and Target Metadata are available in the **Metadata Catalogue**.



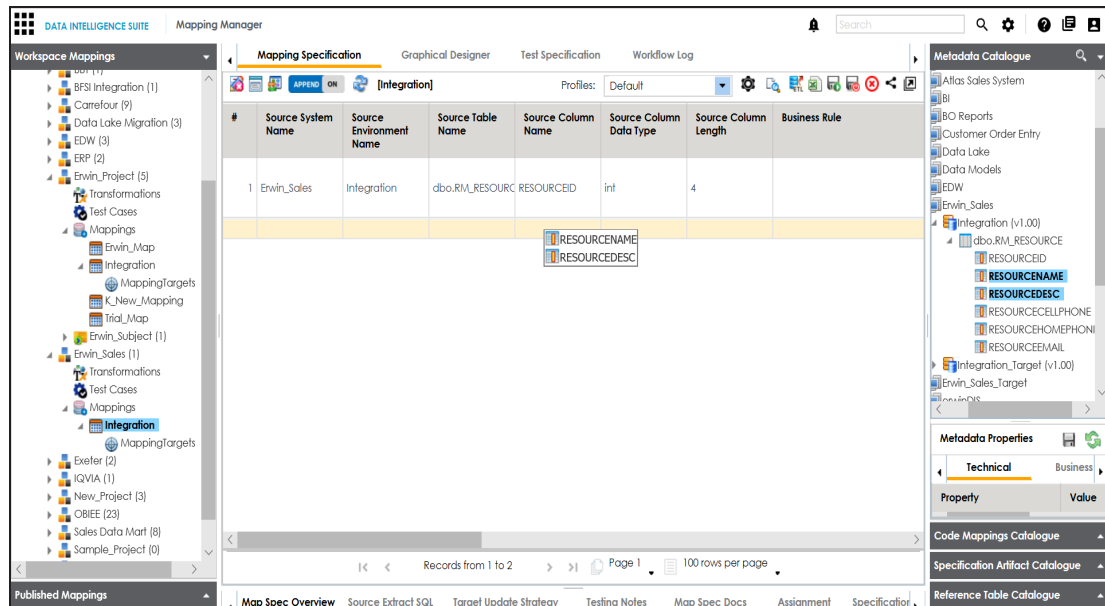
To create one to many or many to many mappings, follow these steps:

1. In the mapping specification grid, click .
2. Toggle  to enable the append mode.

The append mode enables you to drop multiple columns from the Metadata Catalogue in one row of the Mapping Specification grid.

3. Drag and drop source columns from the Metadata Catalogue in the Mapping Specification grid.

**Note:** Use Ctrl key to select multiple columns in the Metadata Catalogue. Drop the source columns under the **Source Columns Name**.

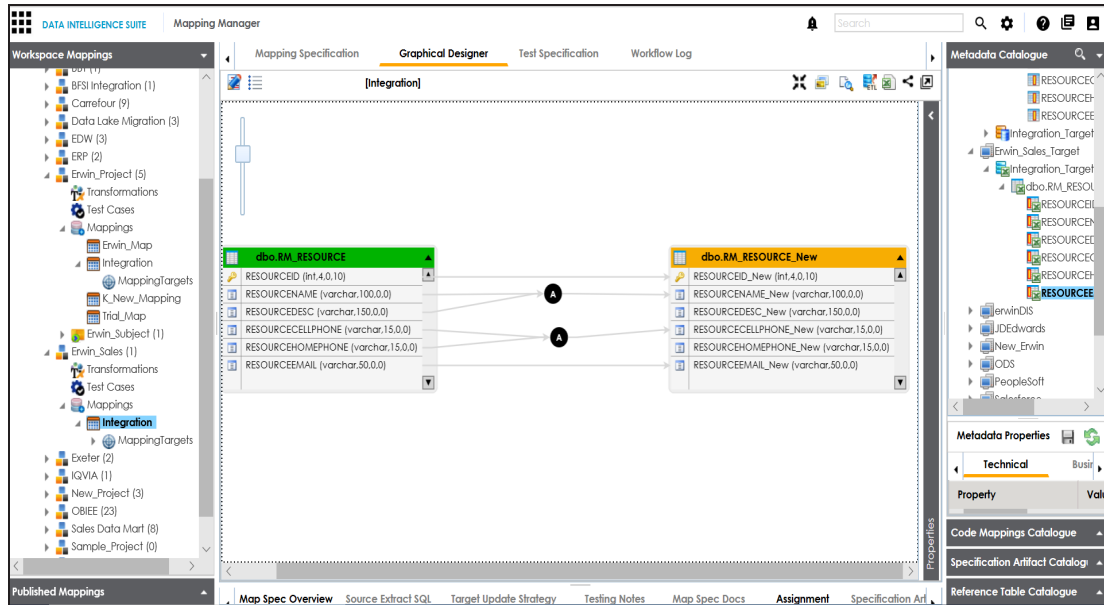


4. Similarly, drag and drop target columns in the mapping specification grid.

5. Click .

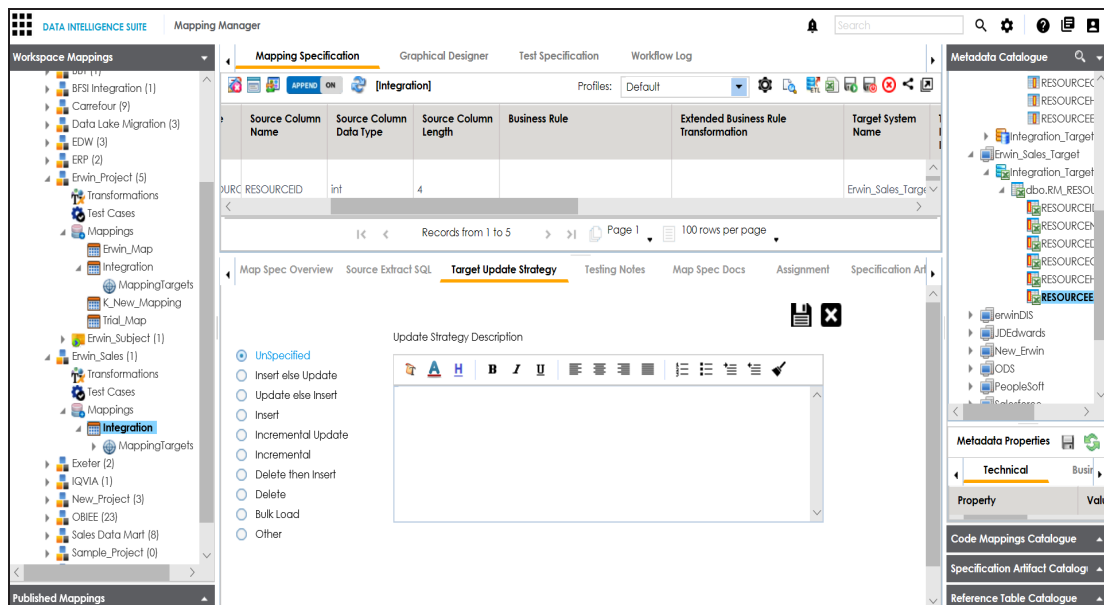
Mapping specifications are saved.


6. Click **Graphical Designer** tab to view the graphical representation of the many to one mappings.



7. Expand the bottom pane and click **Target Update Strategy**.

8. Click .



9. Select the appropriate option and click .

10. Click .

The source to target mapping is saved.

Once a mapping specification is created, you can:

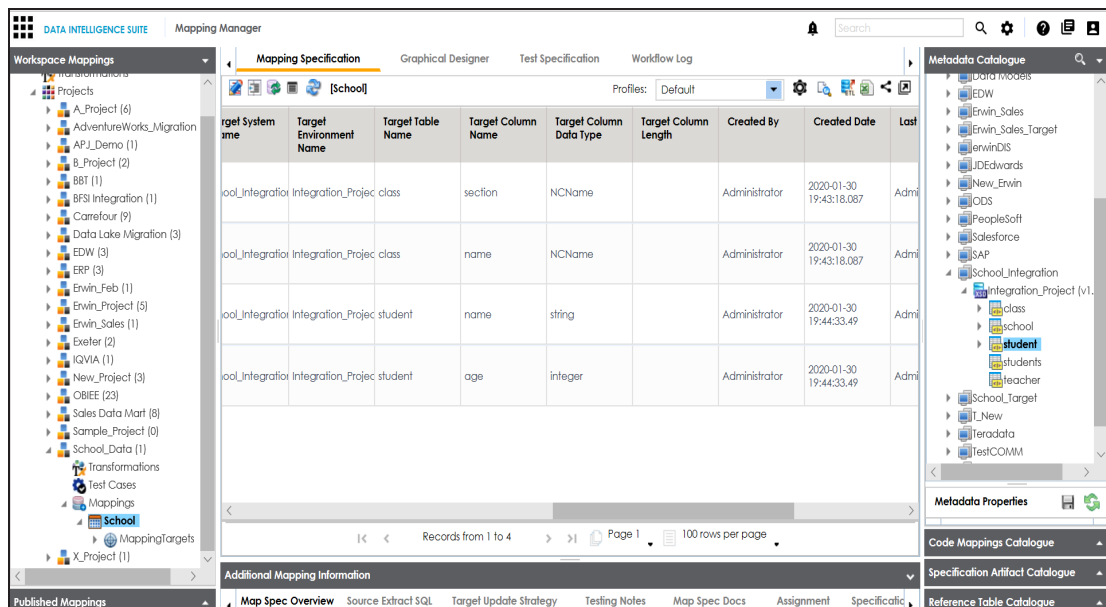
- [Add transformation and lookup details](#)
- [Associate code mappings with the mappings](#)
- [Associate reference tables with the mappings](#)
- [Link requirements with the mappings](#)
- [Analyze mappings](#)

## Specifying XPath in Mapping Specification

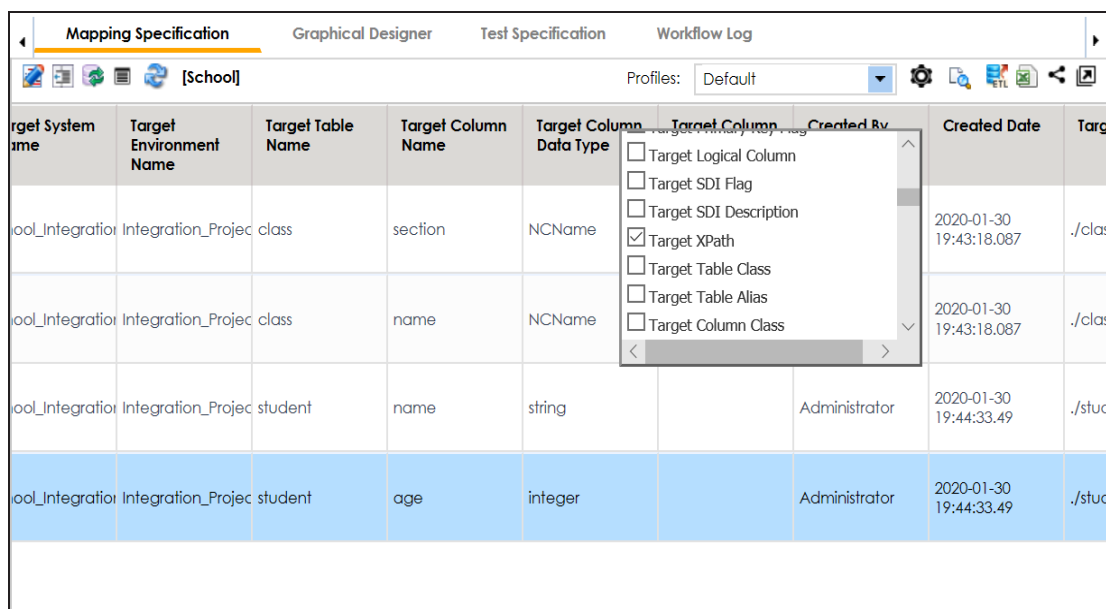
Xpath is a potential path expression in a XML document. Hence, if you have scanned source or target metadata using XSD database type then Xpath plays an important role in mappings. You can specify Xpath in a mapping specification for source and target columns.

To specify Xpath in mapping specifications, follow these steps:

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





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



The Target XPath and Source XPath columns are visible with the corresponding XPath values in the mapping specification grid.

Mapping Specification      Graphical Designer      Test Specification      Workflow Log							
[School]				Profiles: Default			
Target Column Length	Created By	Created Date	Target XPath	Source XPath	Last Modified By	Last Modified Date Time	Reference Table
	Administrator	2020-01-30 19:43:18.087	./class/section	./class/section	Administrator	2020-01-30 19:57:40.59	
	Administrator	2020-01-30 19:43:18.087	./class/@name	./class/@name	Administrator	2020-01-30 19:44:33.49	
	Administrator	2020-01-30 19:44:33.49	./student/name	./student/name	Administrator	2020-01-30 19:44:33.49	
	Administrator	2020-01-30 19:44:33.49	./student/age	./student/age	Administrator	2020-01-30 19:57:40.59	

4. Click .
5. Double-click a cell under Target XPath or Source XPath to enter XPath as desired.
6. Click .

The mapping specification is updated.

## Setting Column Order and Column Visibility

You can change the column order and column visibility in the Mapping Specification. This helps you work more efficiently and accurately.

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

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Click the required map .

The Mapping Specification grid page appears.

The screenshot displays the 'Mapping Manager' application with the 'Mapping Specification' tab active. The central grid lists mapping specifications for 'Erwin\_Map'.

#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_I	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_I	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT_I	bigint	8	ABS
5	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT_I	bigint	8	ABS

Below the grid, the 'Additional Mapping Information' section is visible, with 'Map Spec Overview' selected. The right sidebar shows the 'Metadata Catalog' and 'Metadata Properties'.


4. Click the required column header, drag and drop the column at your desired place.

5. Use  to reset the column ordering and visibility.

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

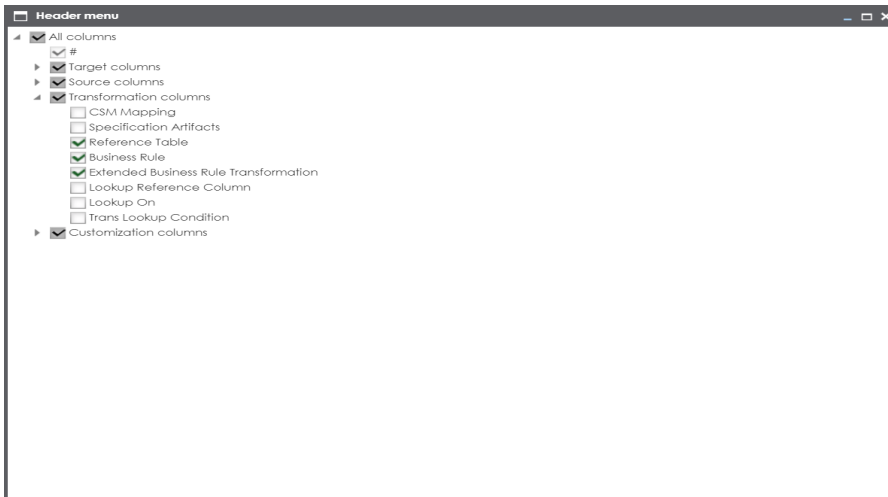
**Note:** Column ordering in Mapping Specifications are not saved and gets reset.

To set the column visibility, follow these steps:

1. In Mapping Specification grid, click .
2. The Header Menu page appears.



3. Expand the respective nodes.
4. Select the columns which you want to be visible in the Mapping Specification grid.



5. Close the **Header Menu** page.

The selected columns are visible in the Mapping Specification grid.

## Updating Additional Mapping Information

The Additional Mapping Information page enables you to add additional mapping information with respect to:

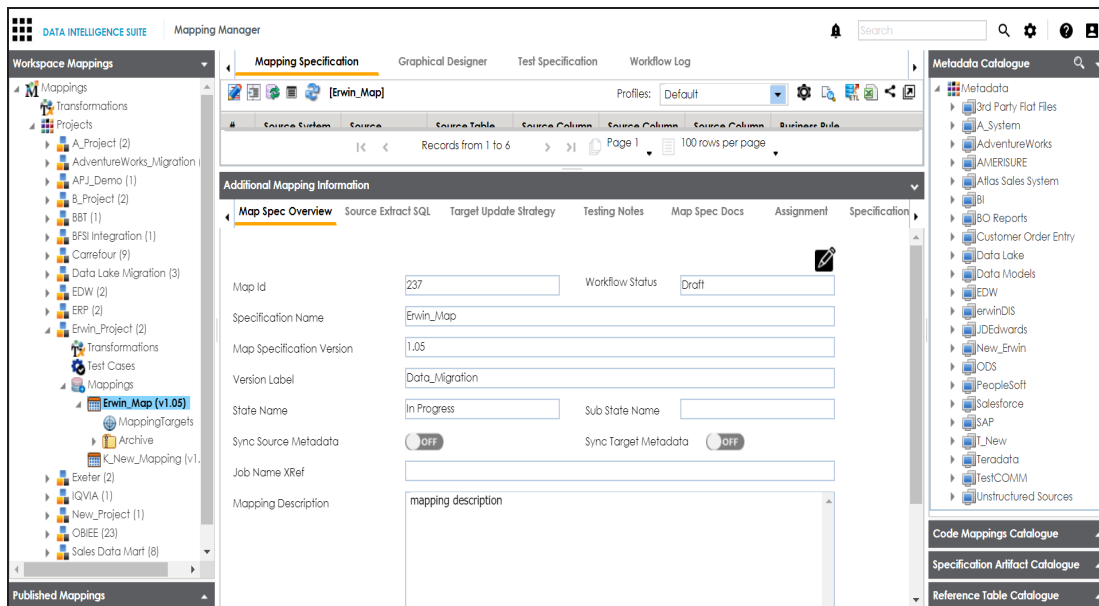


- [Map Spec Overview](#): Under this you can update the following for a mapping specification:
  - Specification name
  - Version label
  - State name and sub-state name
  - Source and target metadata sync
  - Job Name XRef
- [Source Extract SQL](#): Under this you can update:
  - SQL Query relevant to a mapping specification
  - SQL Query Description
- [Target Update Strategy](#): It enables you to set your target update strategy as per your data integration requirements.
- [Testing Notes](#): Under this you can add relevant testing notes with respect to a mapping specification.
- [Map Specs Docs](#): Under this you can upload relevant documents.
- [Assignment](#): Under this you can assign a mapping specification to multiple users.
- [Specification Artifacts](#): Under this you can add specification artifacts relevant to a mapping specification.
- [Level of Effort](#): Under this you can record planned level of effort and actual level of effort in creating mapping and ETL process.
- [Change Log](#): This tab can be enabled in [Mapping Manager Settings](#). It enables you to capture change logs in a mapping specification.
- [Release Information](#): Under this you can view release information of a mapping.
- [Collaboration Center](#): Under this you can collaborate with other users on a topic.
- User Defined Tabs (1-5): There are five user defined tabs that can be used by you with your own [UI labels](#).
- [Extended Properties](#): Under this you can extend properties of a mapping specification by creating custom forms.

To access Additional Mapping Information page of a mapping specification:

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

The Additional Mapping Information page can be accessed.



## Updating Map Spec Overview

You can edit Map Spec Overview page and update various aspects of a mapping specification which includes:

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

To update Map Spec Overview tab, follow these steps:

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

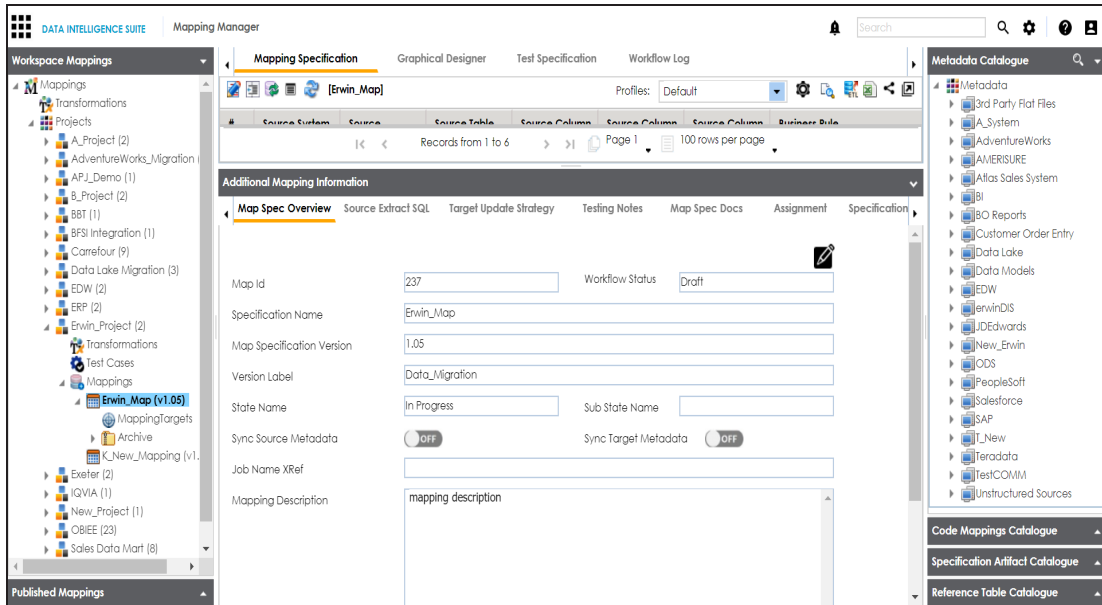
The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.


The screenshot shows the 'Mapping Manager' application window. The main area displays the 'Mapping Specification' tab for a map named '[Erwin\_Map]'. It features a table with the following data:

#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS

Below the table, there is a pagination bar showing 'Records from 1 to 6', 'Page 1', and '100 rows per page'. At the bottom of the main pane, the 'Additional Mapping Information' section is expanded, showing the 'Map Spec Overview' sub-tab. The left sidebar contains a tree view of 'Workspace Mappings', and the right sidebar contains a 'Metadata Catalogue'.

3. Expand the Additional Mapping Information page.
- The Map Spec Overview tab appears.



4. Click .
5. 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
Specification Name	Update the mapping specification name if required.
Version Label	Enter a version label for the mapping specification. You can <a href="#">display version</a> of a mapping specification using the version label.
State Name	Select a state name. You can add a state name in <a href="#">Mapping Manager Settings</a> .
Sub State Name	Select a sub state name. You can add a sub state in <a href="#">Mapping Manager Settings</a> .
Sync Source Metadata	Switch Sync Source Metadata to <b>ON</b> to sync source metadata with the mapping specification.
Sync Target Metadata	Switch Sync Target Metadata to <b>ON</b> to sync target metadata with the mapping specification.
Job Name XRef	Enter a Job Name XRef.

Field Name	Description
Description	Update the description for the mapping specification.

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

For more information on workflow status, refer to the [Managing Mapping Manager Workflows](#) topic.

6. Click .

The fields in the Map Spec Overview tab are updated.

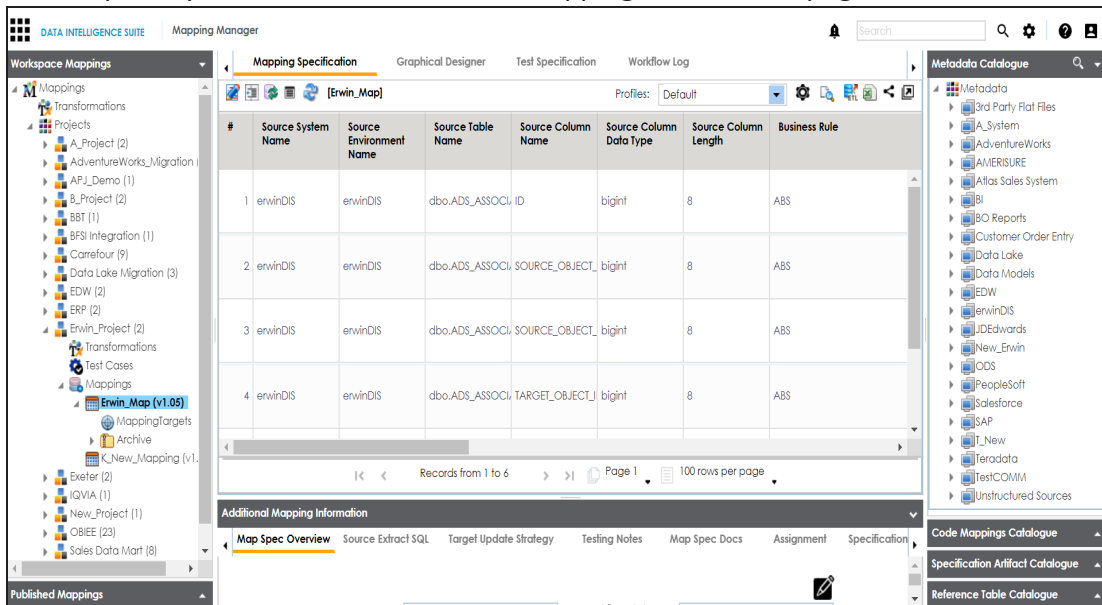
## Updating Source Extract SQL

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

To update Source Extract SQL, follow these steps:

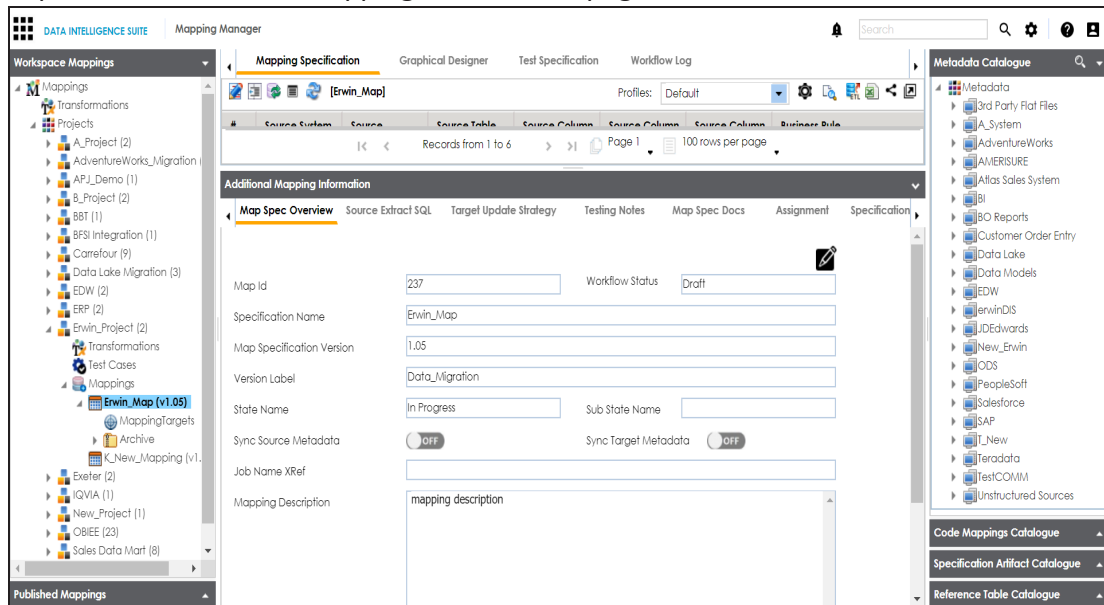
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, click the desired map.

The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.



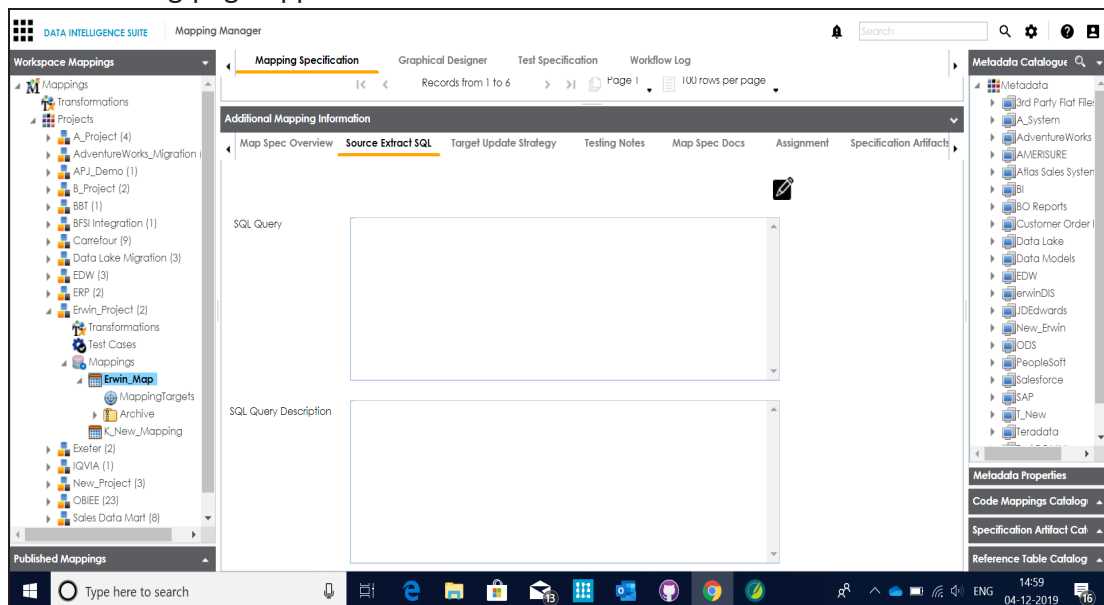
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS

### 3. Expand the Additional Mapping Information page.



### 4. Click **Source Extract SQL** tab.

The following page appears.



### 5. click to enter a SQL query and its description.

6. Enter the SQL query and the SQL Query Description.

7. Click .

The Source Extract SQL is updated.

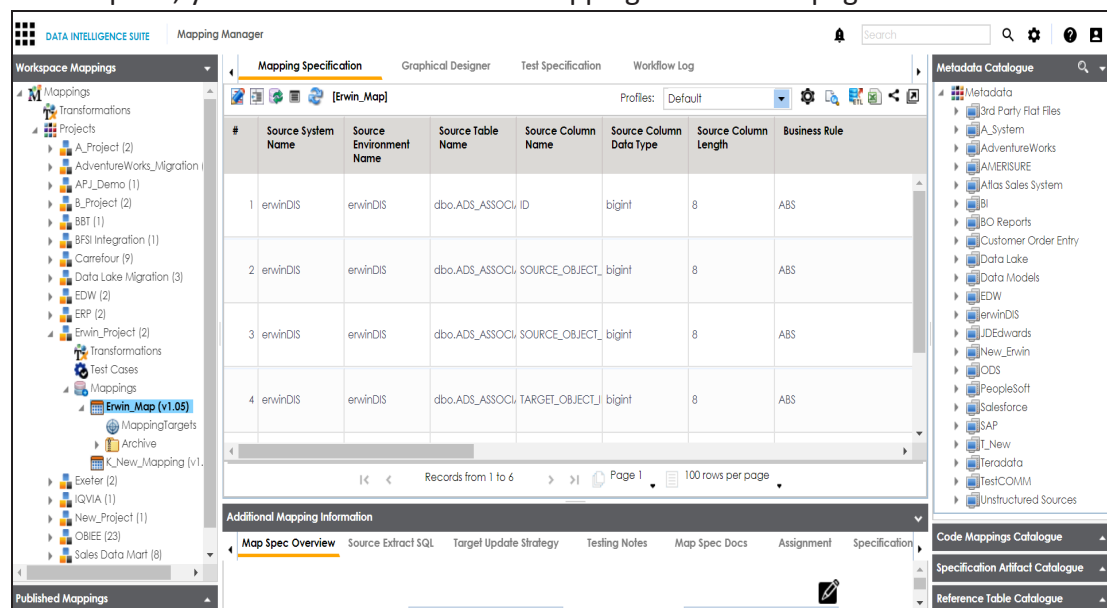
## Setting Target Update Strategy

You can set the way target metadata is updated when source to target mapping is done. You can update the strategy any time as per your need.

To set target update strategy, follow these steps:

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

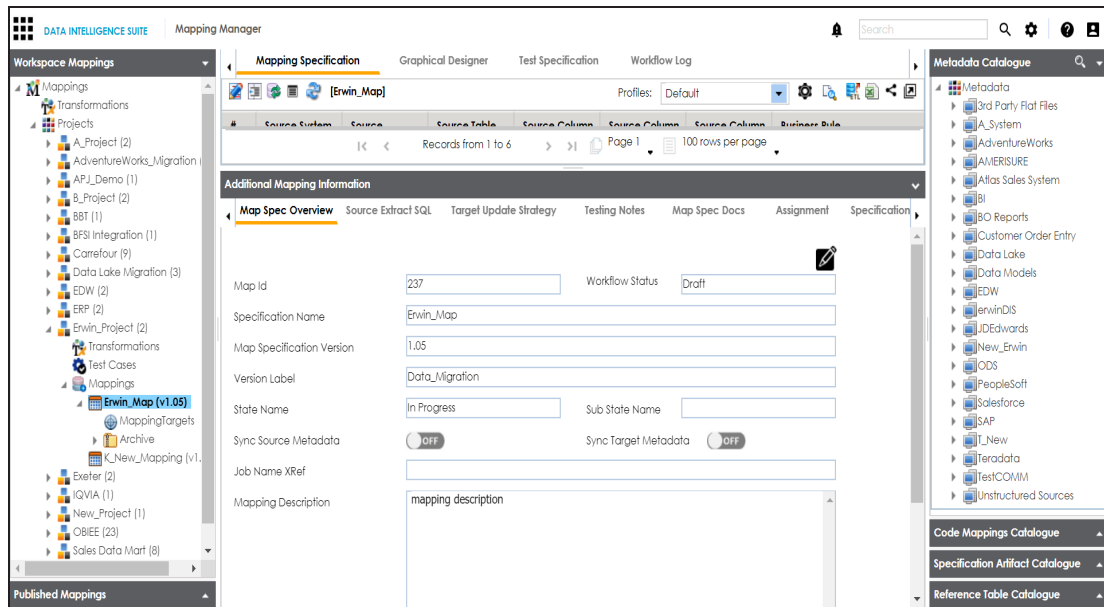
The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.





The screenshot shows the Mapping Manager application with the Mapping Specification tab selected. The main pane displays a table with 6 columns: #, Source System Name, Source Environment Name, Source Table Name, Source Column Name, Source Column Data Type, Source Column Length, and Business Rule. The table contains 4 rows of mapping data. Below the table is a section titled 'Additional Mapping Information' with tabs for Map Spec Overview, Source Extract SQL, Target Update Strategy, Testing Notes, Map Spec Docs, Assignment, and Specification. The 'Target Update Strategy' tab is currently selected. The left pane shows the Workspace Mappings tree, and the right pane shows the Metadata Catalogue.

#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT_I	bigint	8	ABS

3. Expand the Additional Mapping Information page.



4. Click **Target Update Strategy** tab.
5. Click .
6. Select the appropriate update strategy from the options and enter the Update Strategy Description.
7. Click .

The Target Update Strategy is set.

## Updating Testing Notes

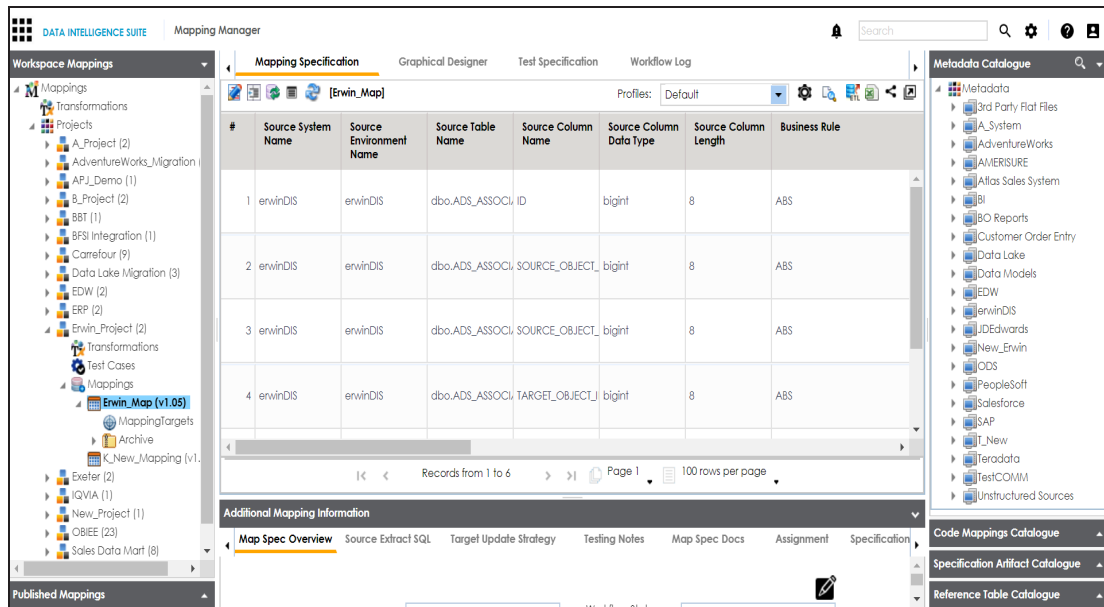
You can keep a record of test results and enter relevant testing notes related to a mapping specification.

To update testing notes, follow these steps:

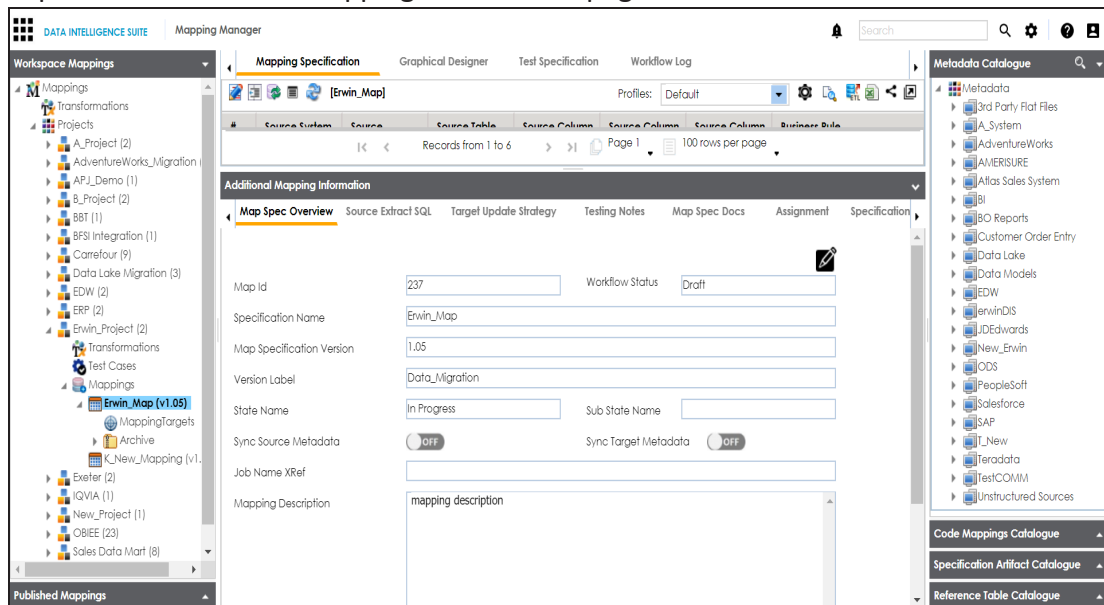
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. In **Workspace Mappings**, click the desired map.

The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.





### 3. Expand the Additional Mapping Information page.



### 4. Click **Testing Notes** tab.

### 5. Click .

### 6. Select the appropriate option and enter the Testing Notes.

7. Click .

The Testing Notes are updated.

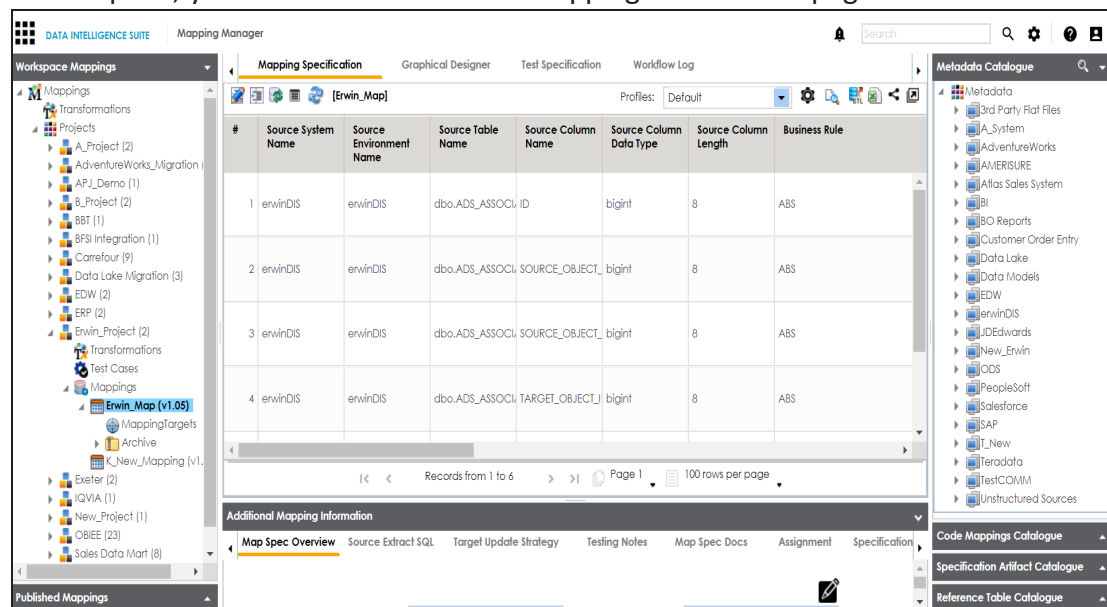
## Uploading Mapping Specification Documents

You can upload relevant documents related to a mapping specification. You can also make the document open for approval.

To upload mapping specification documents, follow these steps:

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

The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.

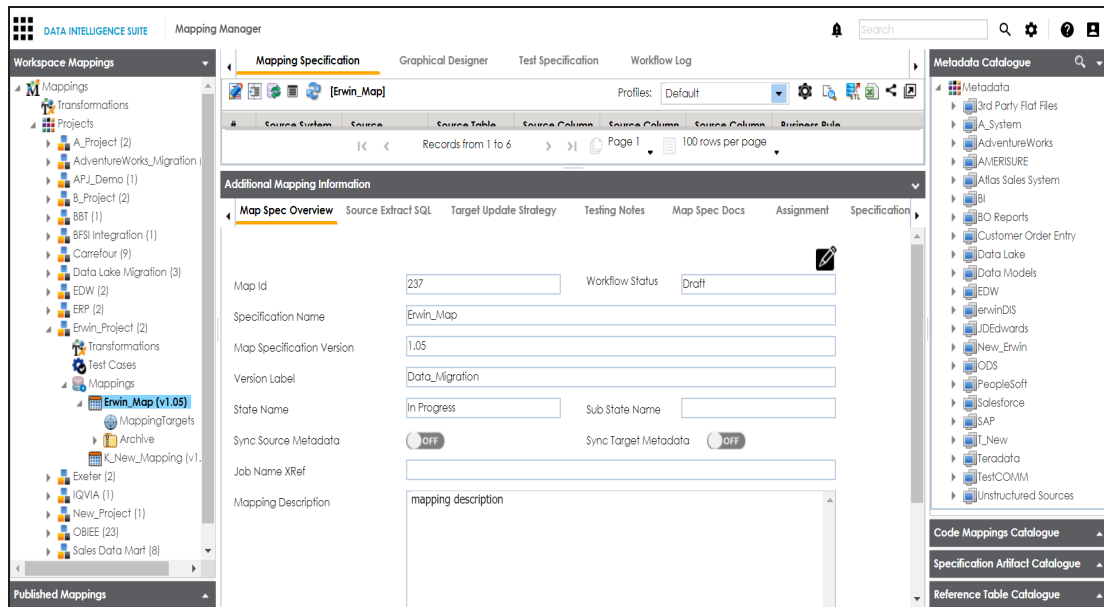


The screenshot shows the Data Intelligence Suite Mapping Manager interface. The main pane displays the Mapping Specification tab for a map named [Erwin\_Map]. The data grid shows the following mapping data:

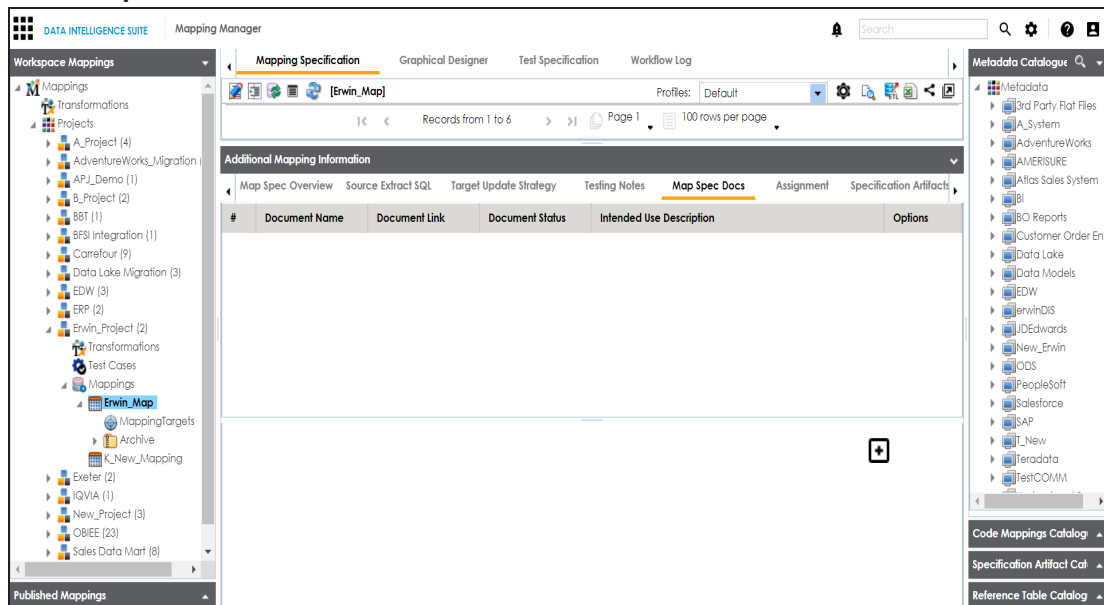
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS

Below the grid, the Additional Mapping Information section is visible, showing tabs for Map Spec Overview, Source Extract SQL, Target Update Strategy, Testing Notes, Map Spec Docs, Assignment, and Specification. The Map Spec Overview tab is currently selected.

3. Expand the Additional Mapping Information page.

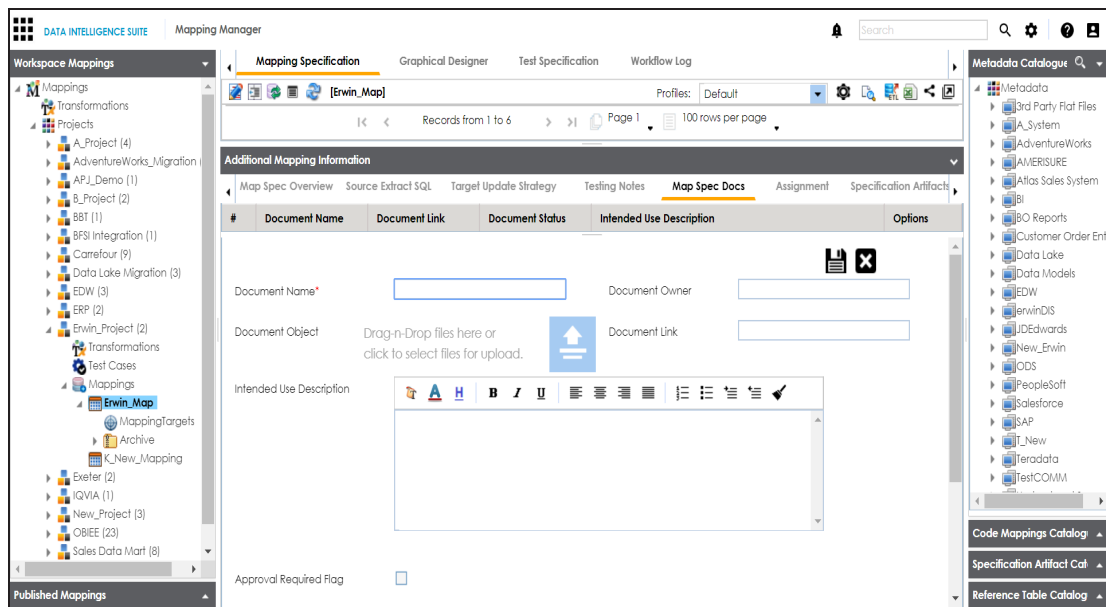


#### 4. Click **Map Sec Docs** tab.




#### 5. To upload mapping specification documents, click .

The following page appears.



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

Field Name	Description
Document Name	Enter the name of the document.
Document Object	Drag and drop or use  to upload relevant files.
Document Owner	Enter the name of the document owner.
Document Link	Enter Url related to document.
Intended Use Description	Describe the intended use of the document.
Approval Required Flag	Select the <b>Approval Required Flag</b> check box to select document status.
Document Status	Select the status of the document from the drop down. This field appears when the <b>Approval Required Flag</b> checkbox is selected.

7. Click .

The mapping specification documents are uploaded.

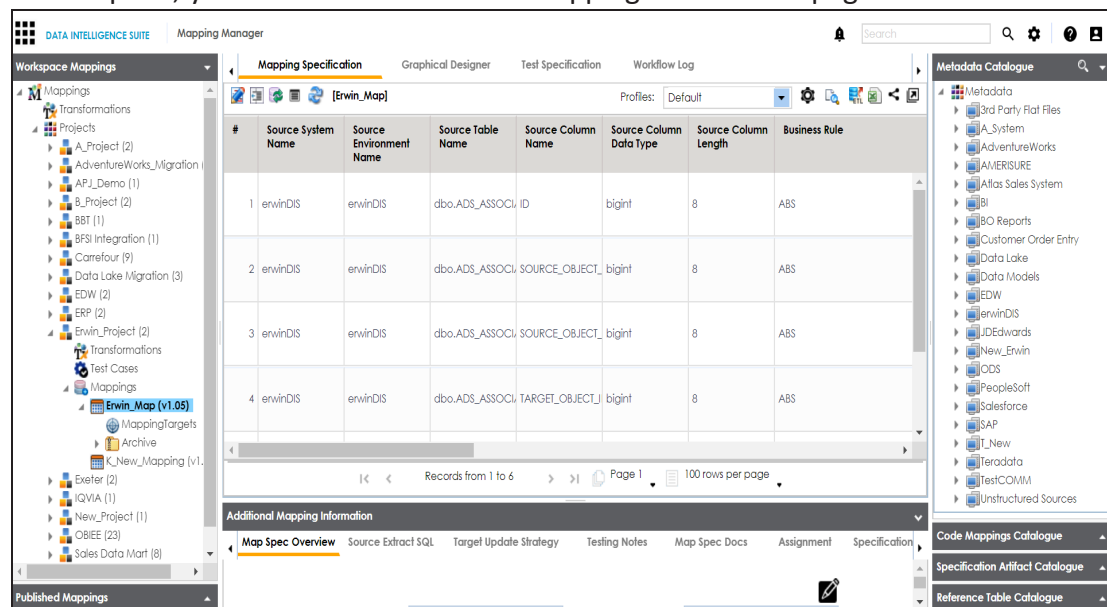
## Assigning Mapping Specifications to Users

When a mapping specification is created it is assigned to Administrator-Default User. You can easily assign the mapping specification to some other users too.

To assign mapping specifications, follow these steps:

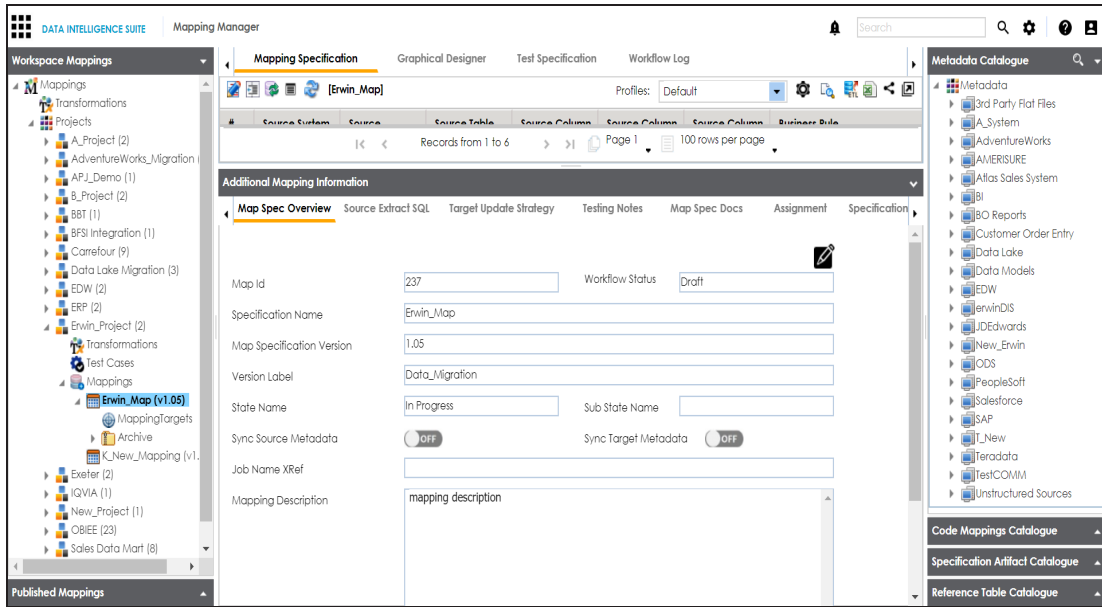
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. In **Workspace Mappings**, click the desired map.

The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.



#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS

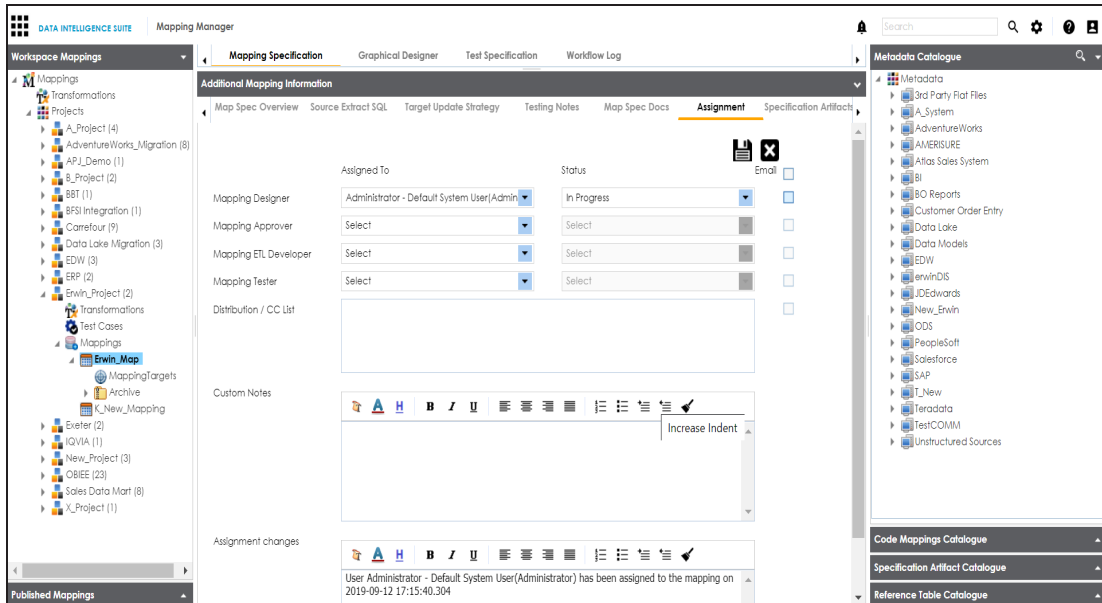
3. Expand the Additional Mapping Information page.



4. Click the **Assignment** tab.

5. Click .

The following page appears.



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

Field Name	Description
Mapping Designer	Select the desired user as the mapping designer. Users can be created in the Resource Manager.
Mapping Approver	Select the desired user as the Mapping Approver. Users can be created in the Resource Manager.
Mapping ETL Developer	Select the desired user as the Mapping ETL Developer. Users can be created in the Resource Manager.
Mapping Tester	Select the desired user as the Mapping Tester. Users can be created in the Resource Manager..
Custom Notes	Enter relevant custom notes.
Email	The Email check boxes populate on selection of the users as Mapping Designer, Mapping Approver, Mapping ETL Developer, and Mapping Tester. Select the check boxes to send email notification to the corresponding users about the assignment. To configure emails, please refer Email Settings.
Status	The Status box appears for each user. Select the appropriate status for each of them. The option list for the status come by default and cannot be edited.
Distribution/CC List	Enter the email IDs of all the persons who should receive the email notification about the assignment. The email IDs would be marked in CC in the email. To configure emails, please refer Email Settings.
Assignment Changes	This field is auto-filled and tracks the changes in the assignment.

7. Select the appropriate option and enter the Testing Notes.

8. Click .

The Assignment is updated.

## Noting Down the Relevant Specification Artifacts

The functional requirements of a data integration project are captured in the [Requirements Manager](#) with the help of Specification Artifacts. You can make a note of specification artifacts relevant to the mapping specification.

To keep a note of specification artifacts relevant to a mapping specification, follow these steps:

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

The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.

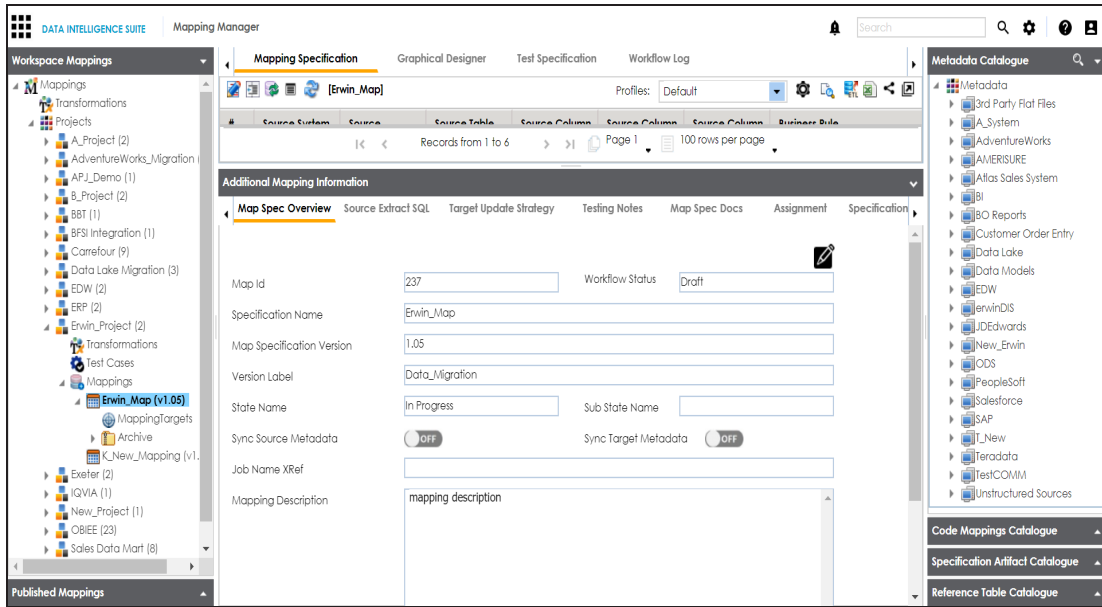
The screenshot shows the Data Intelligence Suite Mapping Manager interface. The main pane displays the Mapping Specification tab for the 'Erwin\_Map'. The mapping data grid is as follows:

#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS

Below the grid, the 'Additional Mapping Information' section is expanded, showing the 'Map Spec Overview' tab. The interface also includes a left sidebar with 'Workspace Mappings' and a right sidebar with 'Metadata Catalogue' and 'Code Mappings Catalogue'.

3. Expand the Additional Mapping Information page.

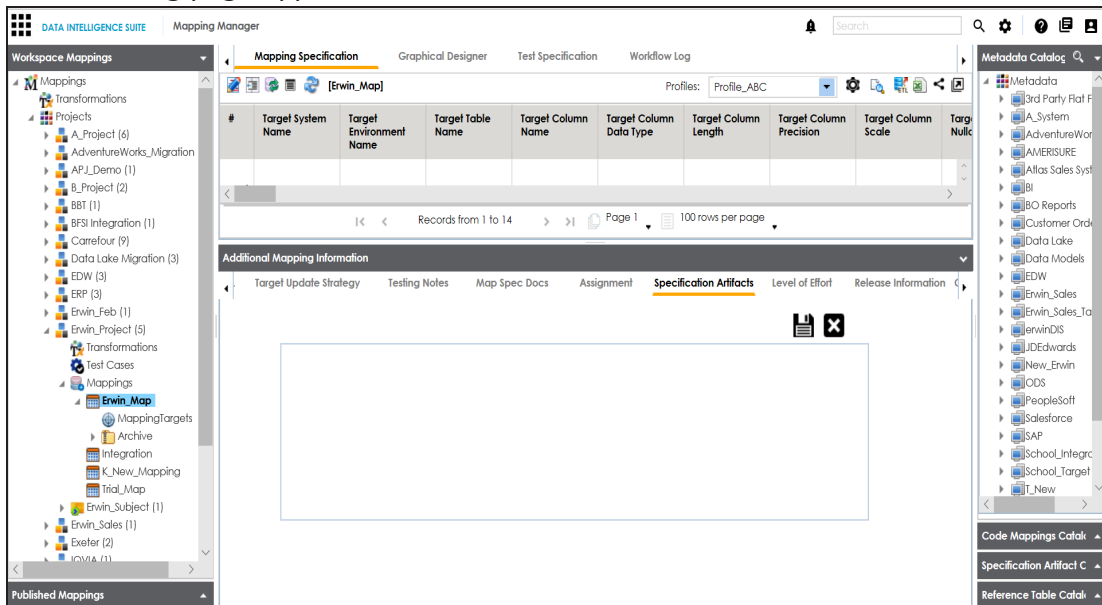




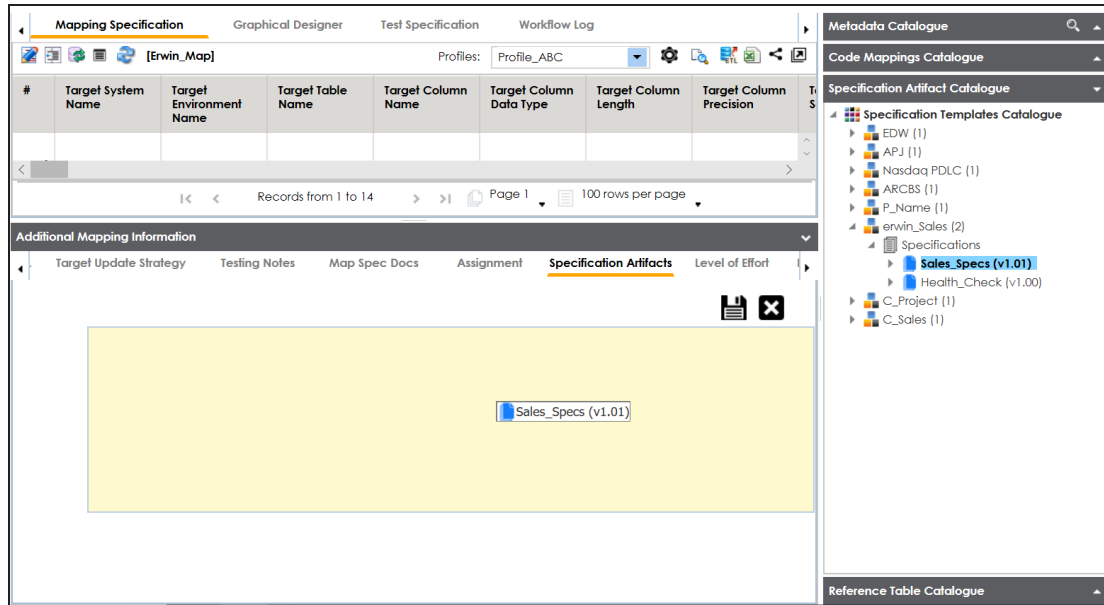
4. Use ► to scroll right.

5. Click the **Specification Artifacts** tab and click .

The following page appears.



6. Expand the Specification Templates Catalog pane and drag and drop a specification.



7. Click .

The Specification Artifacts information is saved.

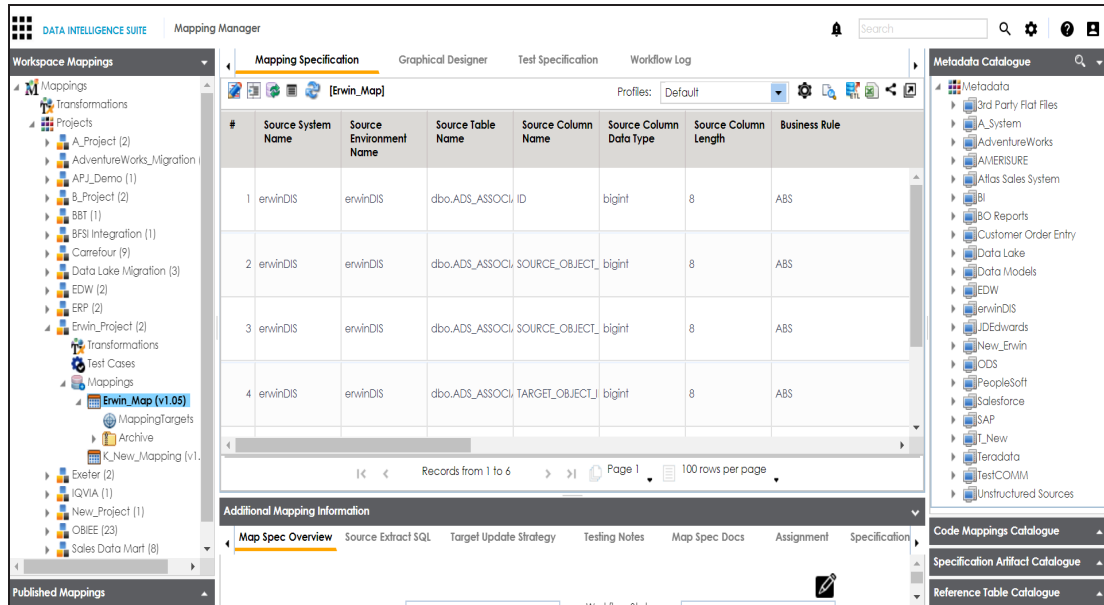
## Recording Level of Effort

You can record and compare planned level of effort with the actual level effort devoted in creating and managing the mapping specifications for an ETL process.

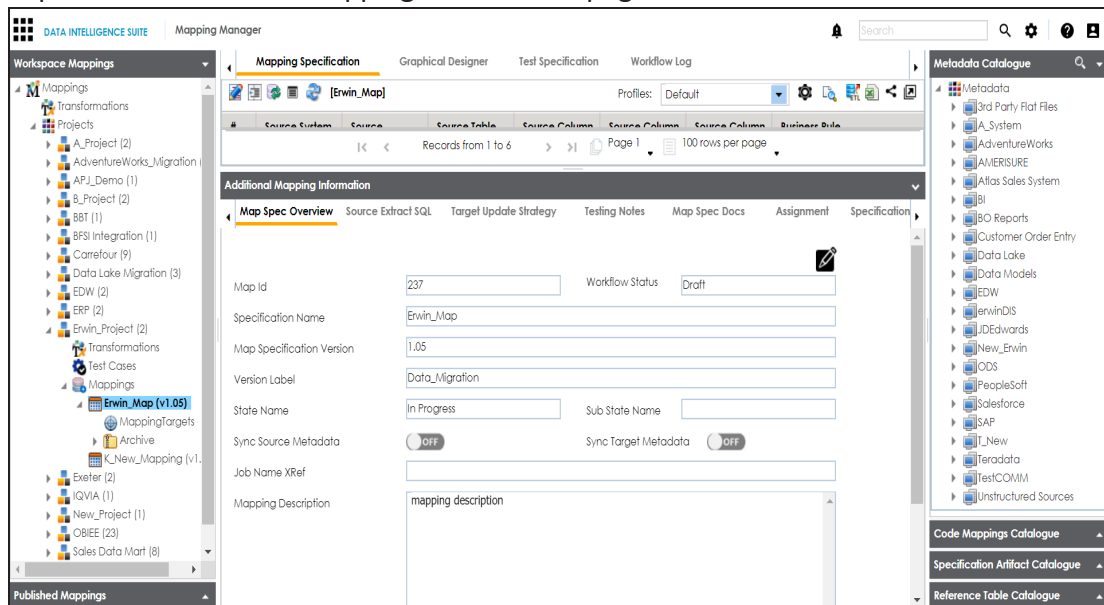
To record the level of effort, follow these steps:

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

The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.



### 3. Expand the Additional Mapping Information page.



### 4. Use ► to scroll right.

### 5. Click the **Level of Effort** tab.

### 6. Click .

**Data Intelligence Suite** Mapping Manager

**Workspace Mappings**

- Transformations
- Projects
  - A\_Project (4)
    - AdventureWorks\_Migration (8)
    - AP\_Infino (1)
    - B\_Project (2)
    - BBI (1)
    - BFSI Integration (1)
    - Careflow (9)
    - Data Lake Migration (3)
    - EDW (3)
    - ERP (2)
  - Erwin\_Project (2)
    - Transformations
    - Test Cases
    - Mappings
      - Erwin\_Map**
        - Mapping targets
        - Archive
        - K\_New\_Mapping
  - Evieter (2)
    - IQVIA (1)
    - New\_Project (3)
    - OBIEE [23]
    - Sales Data Mart (8)
    - X\_Project (1)

**Published Mappings**

**Mapping Specification** Graphical Designer Test Specification Workflow Log

**Additional Mapping Information**

Map Spec Overview Source Extract SQL Target Update Strategy Testing Notes Map Spec Docs **Assignment** Specification Artifacts

	Assigned To	Status	Email
Mapping Designer	Administrator - Default System User(Admin)	In Progress	<input type="checkbox"/>
Mapping Approver	Select	Select	<input type="checkbox"/>
Mapping ETL Developer	Select	Select	<input type="checkbox"/>
Mapping Tester	Select	Select	<input type="checkbox"/>
Distribution / CC List			<input type="checkbox"/>

Custom Notes

Assignment changes

User Administrator - Default System User(Administrator) has been assigned to the mapping on 2019-09-12 17:15:40.304

**Metadata Catalogue**

- Metadata
  - 3rd Party Flat Files
  - A\_System
  - AdventureWorks
  - AVERSURE
  - Atlas Sales System
  - BI
  - BO Reports
  - Customer Order Entry
  - Data Lake
  - Data Models
  - EDW
  - erwinDIS
  - JDEdwards
  - New\_Erwin
  - ODS
  - PeopleSoft
  - Salesforce
  - SAP
  - T\_New
  - Taradata
  - TestCOMM
  - Unstructured Sources

**Code Mappings Catalogue**

**Specification Artifact Catalogue**

**Reference Table Catalogue**

- | Field Name              | Sub-Fields     | Description  |
|-------------------------|----------------|--|
| Planned Level of Effort | Mapping Effort | Enter the planned mapping effort in days. The field takes floating numbers only. |
|                         | ETL Effort     | Enter the planned ETL effort in days. The field takes floating numbers only.     |
|                         | Notes          | Enter relevant notes.  |
| Actual Level of Effort  | Mapping Effort | Enter the actual mapping effort in days. The field takes floating numbers only.  |
|                         | ETL Effort     | Enter the actual ETL effort in days. The field takes floating numbers only.      |
|                         | Notes          | Enter relevant notes.  |

- The Level of Effort tab is updated.

## Viewing Change Logs

By default this tab is not available under Additional Mapping Information page. You can enable/disable the Change Log tab under Additional Mapping Information page. For more information on change log capture, refer to the [Configuring Change Logs in Mapping Specifications](#) topic.

To view the change logs of the mapping specifications, follow these steps:

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

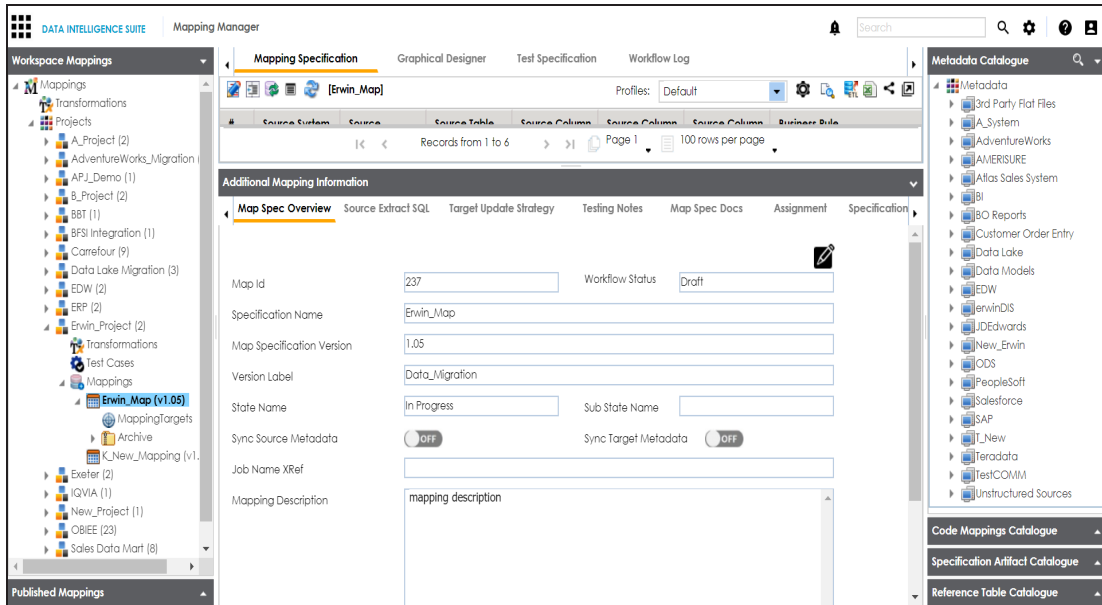
The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.

The screenshot displays the Data Intelligence Suite Mapping Manager interface. The main window is titled 'Mapping Manager' and shows the 'Mapping Specification' tab for the 'Erwin\_Map'. The interface includes a left sidebar with 'Workspace Mappings' and a right sidebar with 'Metadata Catalogue'. The central pane shows a table with mapping data.

#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS

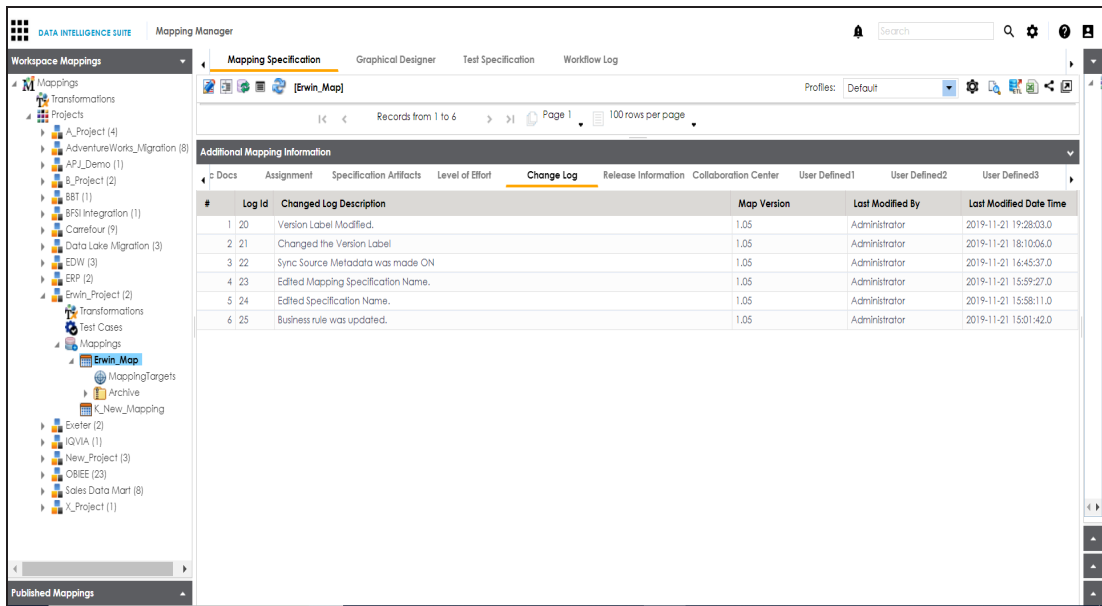
Below the table, there is a section titled 'Additional Mapping Information' with tabs for 'Map Spec Overview', 'Source Extract SQL', 'Target Update Strategy', 'Testing Notes', 'Map Spec Docs', 'Assignment', and 'Specification'. The 'Map Spec Overview' tab is currently selected.

3. Expand the Additional Mapping Information page.



4. Use ► to scroll right.
5. Click **Change Log** tab.

The following page appears showing the change logs.



## Viewing Release Information

You can manage your data item mapping releases in the Release Manager. The release details are available in the Mapping Manager with all the migration and the audit details.

To view the release information of the mapping specifications, follow these steps:

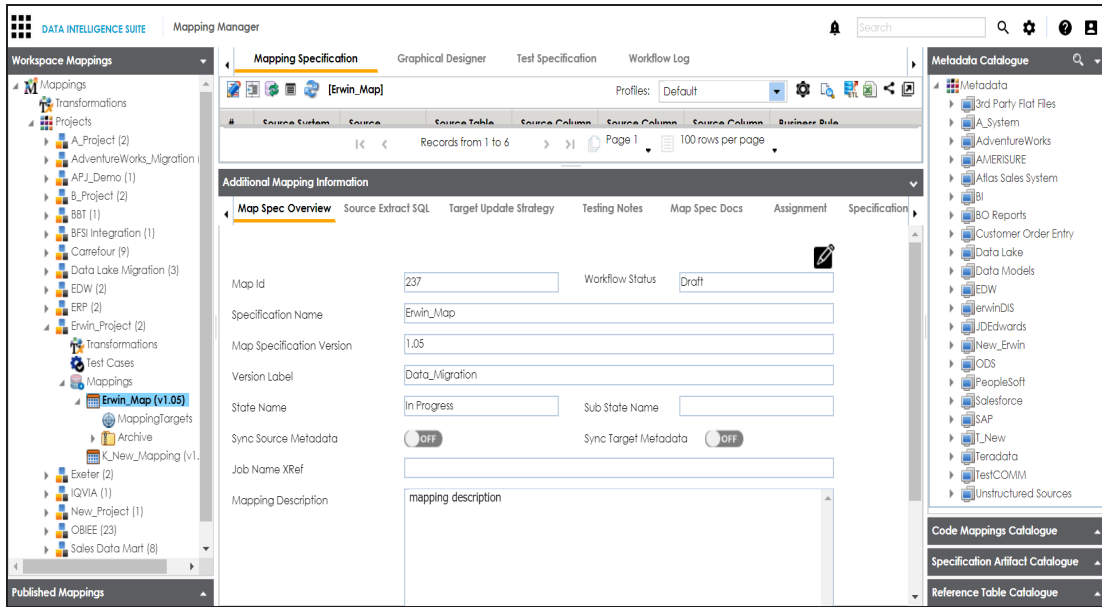
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. In **Workspace Mappings**, click the desired map.

The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.

The screenshot shows the Mapping Manager application window. The left pane displays a tree view of workspace mappings, with 'Erwin\_Map (v1.05)' selected. The main pane shows the 'Mapping Specification' tab, which contains a table with mapping data. The table has columns for Source System Name, Source Environment Name, Source Table Name, Source Column Name, Source Column Data Type, Source Column Length, and Business Rule. The table lists four rows of mapping data. Below the table, the 'Additional Mapping Information' section is expanded, showing tabs for Map Spec Overview, Source Extract SQL, Target Update Strategy, Testing Notes, Map Spec Docs, Assignment, and Specification. The right pane shows the Metadata Catalogue with various metadata items listed.

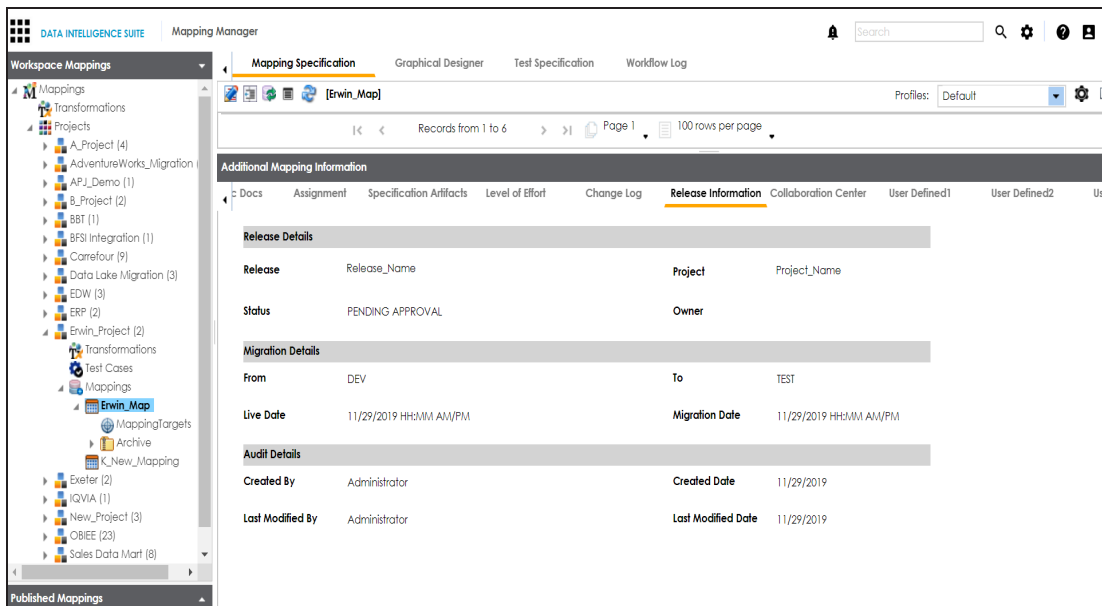
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS

3. Expand the Additional Mapping Information page.



4. Use ► to scroll right.
5. Click **Release Information** tab.

The following page appears showing the release information of the mapping specification.



For more information on releases, refer to the [Release Manager](#) section.



## Collaborating with Users

You can collaborate with other users on a mapping specification in the Mapping Manager. You need to create a topic under the Collaboration Center and assign users to the topic. The assigned users can chat with each other and discuss the topic.

To collaborate with other users, follow these steps:

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

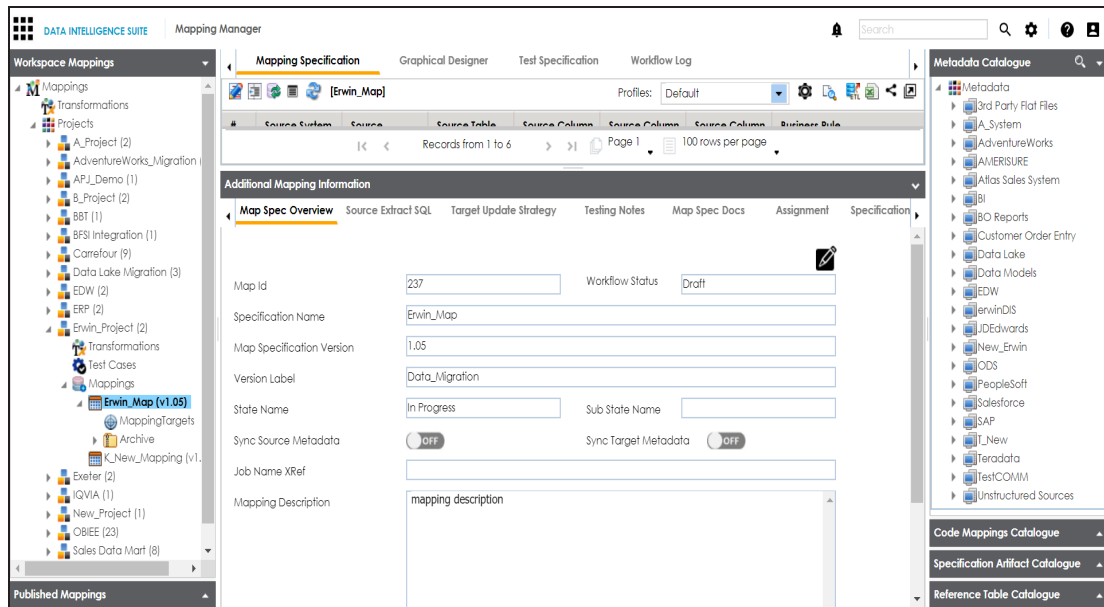
The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.

The screenshot shows the Mapping Manager interface. The left pane displays a tree view of workspace mappings, with 'Erwin\_Map (v1.05)' selected. The main pane shows the 'Mapping Specification' tab with a data grid. The grid has columns: #, Source System Name, Source Environment Name, Source Table Name, Source Column Name, Source Column Data Type, Source Column Length, and Business Rule. It contains 4 rows of mapping data. Below the grid is the 'Additional Mapping Information' section, which is expanded to show the 'Map Spec Overview' tab. The right pane shows the 'Metadata Catalogue' with a search bar and a list of metadata items. At the bottom right, there are three more catalogues: 'Code Mappings Catalogue', 'Specification Artifact Catalogue', and 'Reference Table Catalogue'.

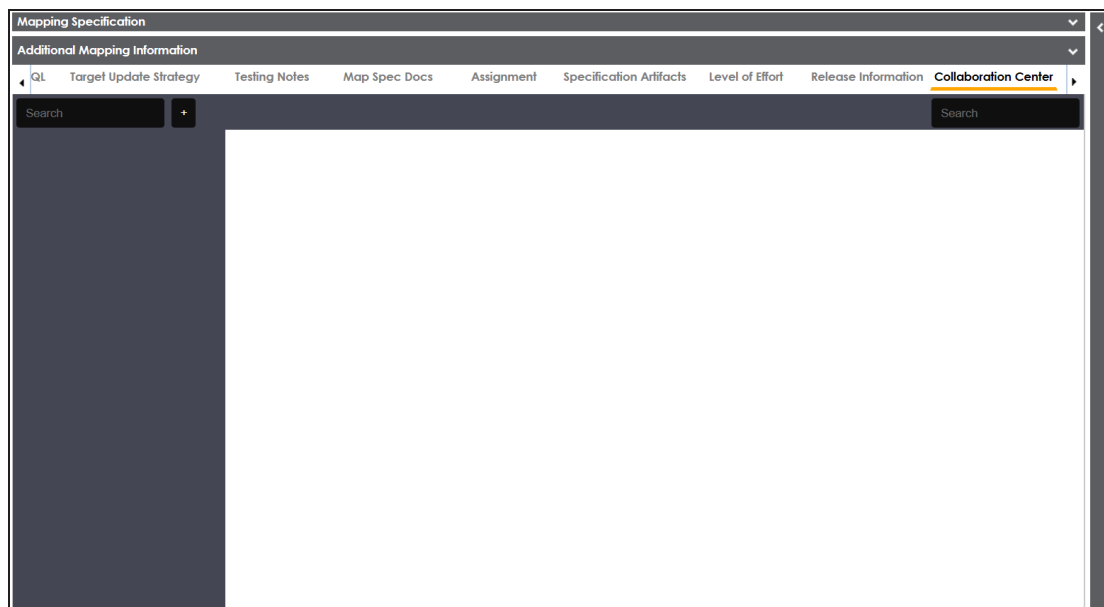
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS

3. Expand the Additional Mapping Information page.

The Map Spec Overview tab appears.



4. Use ► to scroll right and click the **Collaboration Center** tab.



5. Click  to add a topic.

The Add Topic page appears.

6. Enter Topic Name and Description.

7. Click .

The new topic is created and saved under the Collaboration Center tab.

8. Click .

9. Use the following options:

### View Topic Details

Use this option to view the topic details.

**View Topic**

Topic Name \*: Data Integration

Description : Data integration project for Erwin Sales

Created By: Administrator

Created DateTime: 02/07/2020 19:11:30

Modified By: Administrator

Modified DateTime: 02/07/2020 19:11:30

## Edit Topic Details

Use this option to edit the topic details.

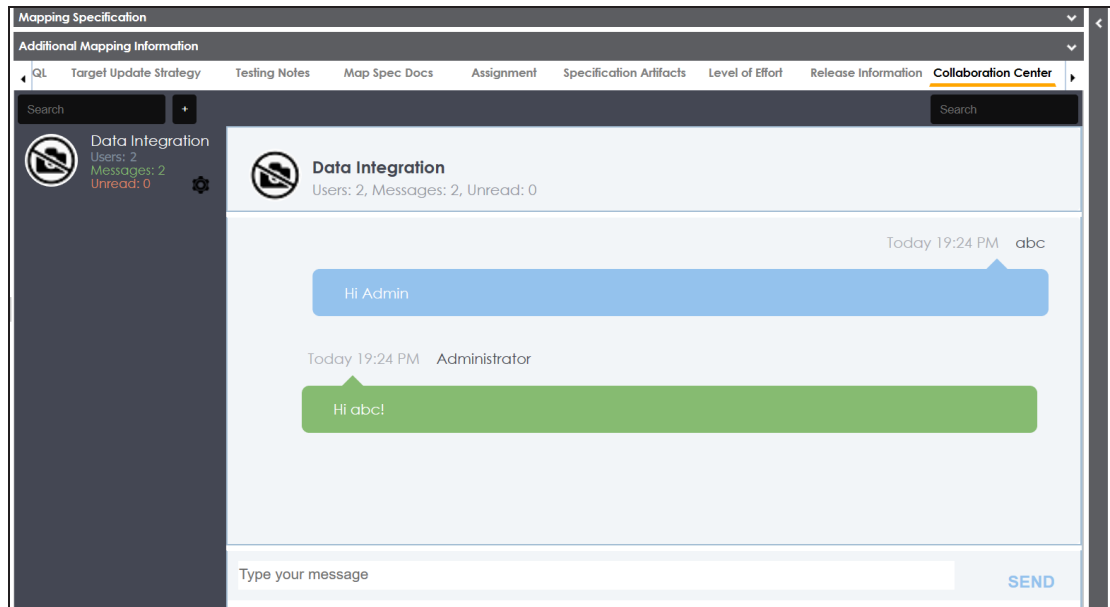
## Assign Users

Use this option to assign users to the topic.

**User Assignment**

<input type="checkbox"/>	public	
<input type="checkbox"/>	abc	
<input checked="" type="checkbox"/>	Administrator	
<input type="checkbox"/>	janedoe	
<input type="checkbox"/>	jdenver	
<input type="checkbox"/>	jdoe	
<input type="checkbox"/>	M.Samuel	
<input type="checkbox"/>	mbeag	

Select check boxes to assign users to the topic and then click . The assigned users can chat and collaborate with each other.



### Save Conversation as Text

Use this option to download the conversation in a .txt file.

### Send Topic as Email

Use this option to send topic as an email to the assigned users.

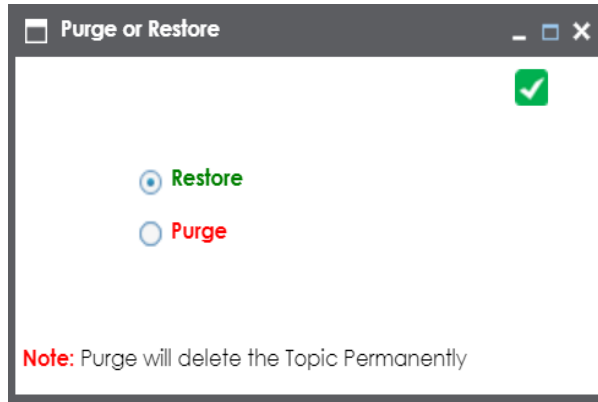
### Delete Topic

Use this option to delete the topic. The topic is deleted for all the assigned users.


**Note:** Any assigned user can delete the topic.

### Restore or Purge Topic

The deleted topic can be restored or deleted permanently (Purge). Click **Restore or Purge Topic**.



To restore the topic, select the **Restore** radio button and click .

To delete the topic permanently, select the **Purge** radio button and click .

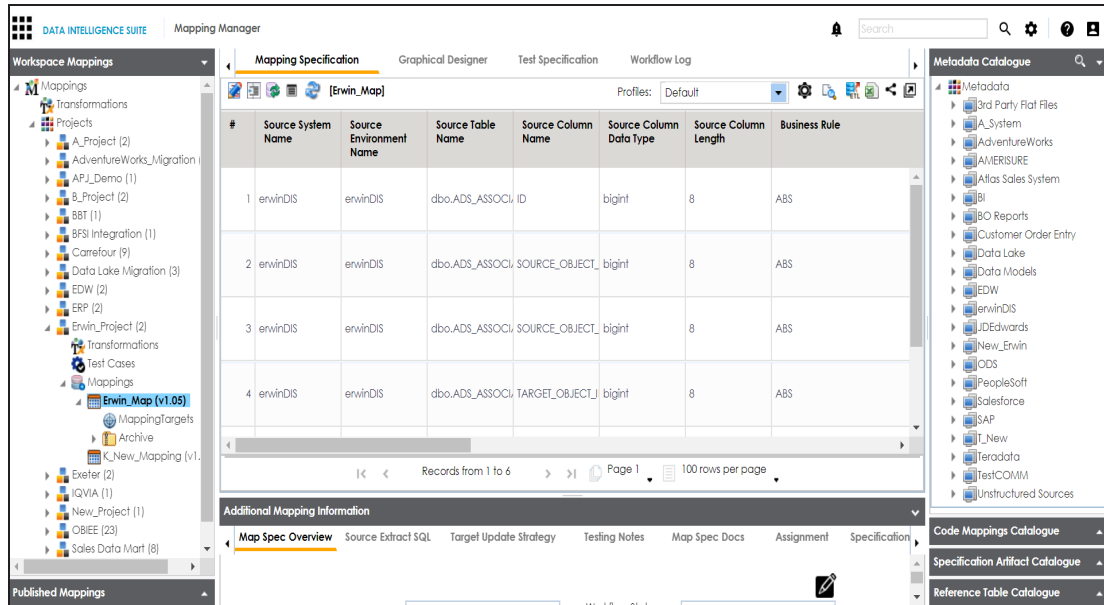
## Extending Mapping Specification Properties

You can configure extended properties of a mapping specification by designing a form and access the form under the **Extended Properties** tab.

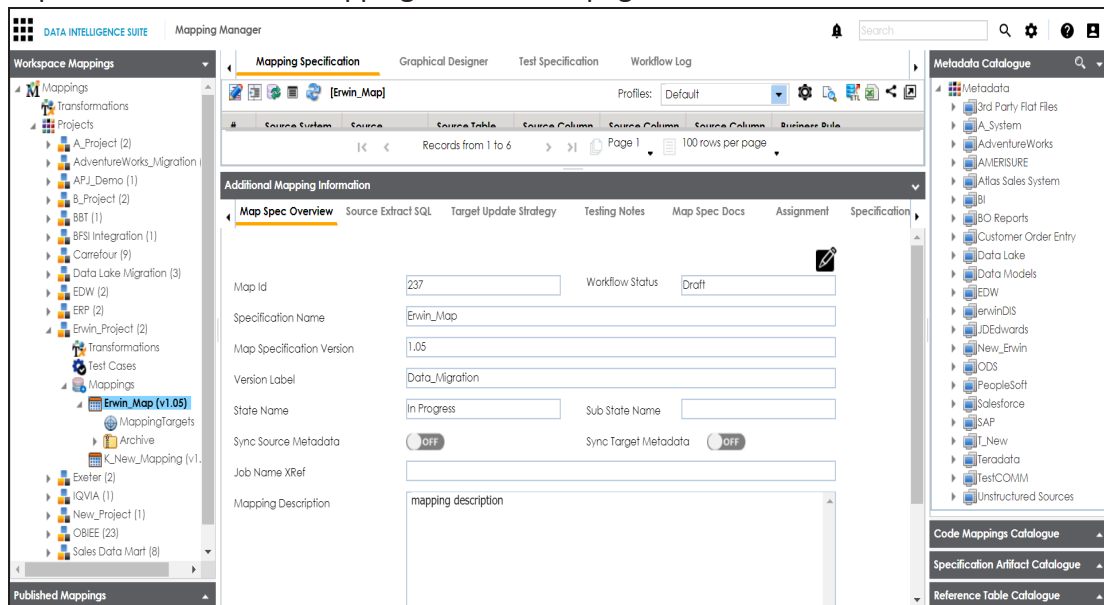
To configure extended properties of mapping specifications, follow these steps:

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

The Mapping Specification tab displays the mapping data grid. At the bottom of the middle pane, you can locate Additional Mapping Information page.

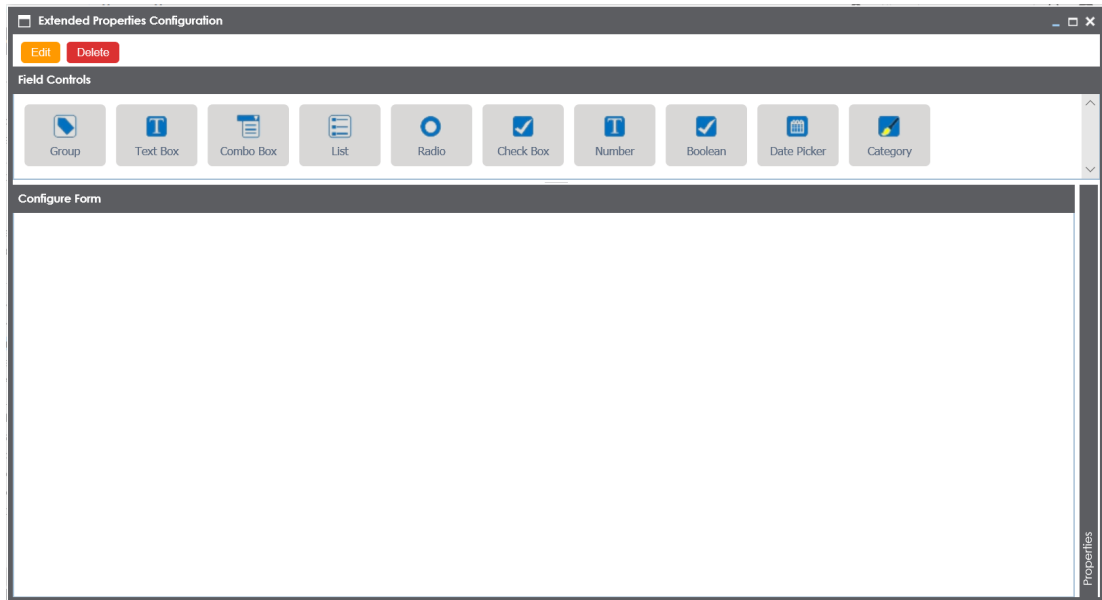


### 3. Expand the Additional Mapping Information page.



### 4. Use ► to scroll right and click the **Extended Properties** tab.

### 5. Click **Configure**.



The **Extended Properties Configuration** page contains the following sections:

- **Field Controls:** This pane displays the available UI elements.
  - **Configure Form:** Use this pane to design forms using the available UI elements in the **Field Controls** pane.
  - **Properties:** This pane displays the properties of the selected UI element in the **Configure Form** pane.
6. Click **Edit** and double-click or drag and drop the required UI elements from the **Field Controls** pane to the **Configure Form** pane.
  7. Select UI elements, one at a time, and configure their properties in the **Properties** pane.



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

Refer to the following table for property descriptions:

Property	Description
Published	Turn <b>Published</b> to <b>ON</b> to publish the field.
Field	Double-click the corresponding <b>Value</b> cell to change the label of the field.
Type	Double-click the corresponding <b>Value</b> cell to select different types of the field.
Configure Values	Click <b>Configure Values</b> to enter option values. You can use: <ul style="list-style-type: none"> <li>▪ <b>Default connector:</b> It enables you to enter options manually.</li> <li>▪ <b>Reference Data Manager :</b> It enables you to pull the data from reference tables in the Reference Data Manager.</li> </ul>
Mandatory	Select the check box to make the field mandatory in the form.
Description	Double-click the corresponding Value cell to enter a description of the field.
Visible in Extended Properties	Turn <b>Visible in Extended Properties</b> to ON to make it visible.

Property	Description
Order	Displays the order of the field. You can drag and drop the field in the <b>Configure Form</b> pane to change its order.

8. Click **Save**.

The form is saved under the **Extended Properties** tab.

To use the form, follow these steps:

1. Under the Workspace Mappings pane, click a map, expand the Additional Mapping Information page and click the **Extended Properties** tab.
2. Click **Edit** and use the form.
3. Click **Save**.

The form is updated.

## Branching and Merging Mappings

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

Branching and merging mappings involves:

- [Branching the mappings](#)
- [Merging changes into the parent mappings](#)

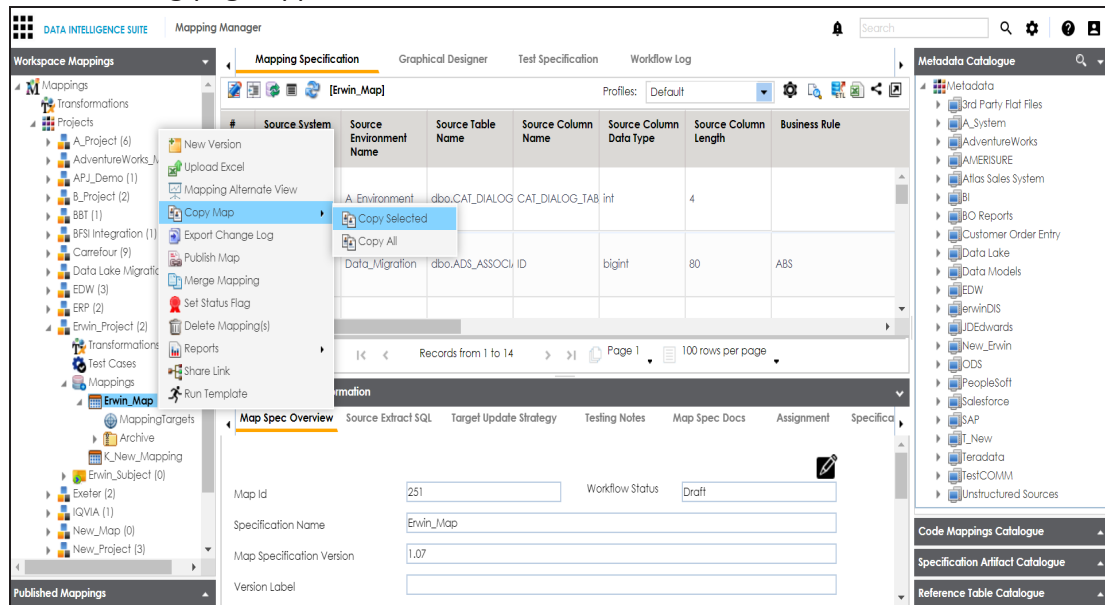
## Branching the Mappings

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

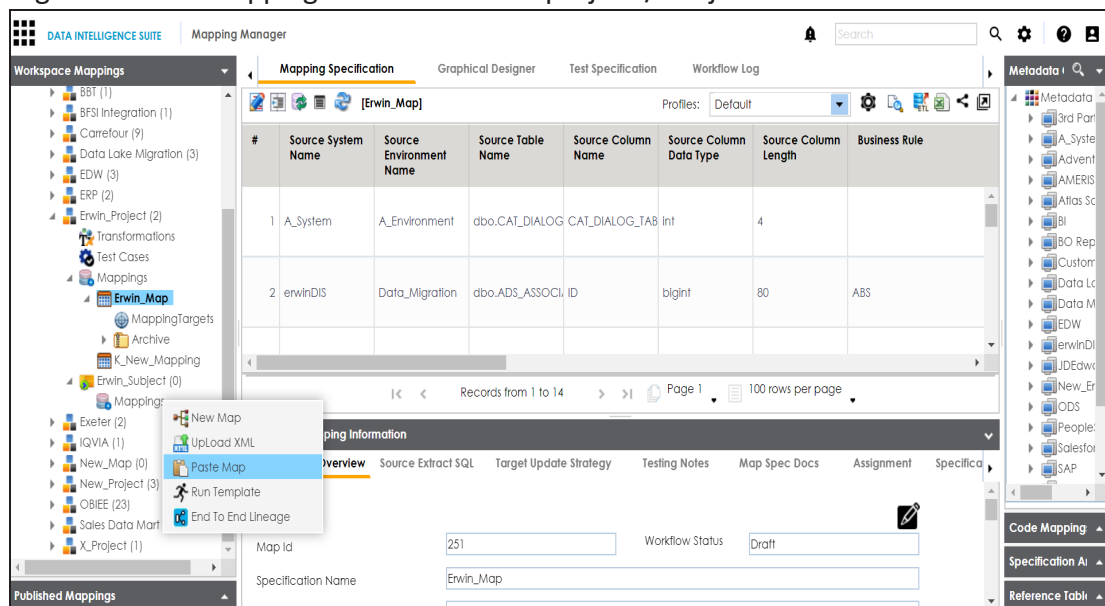
To branch mappings, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Right-click the map to be branched and hover over the **Copy Map**.

The following page appears.

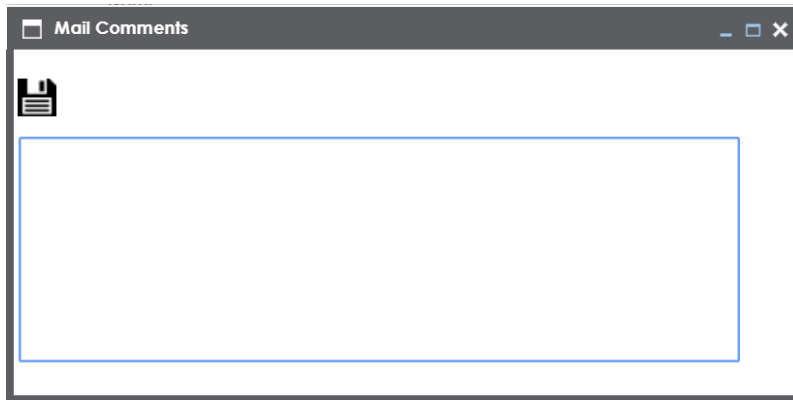



3. Click **Copy Selected**.
4. Go to the subject area / project where you wish to paste the map.
5. Right-click the Mappings node under the project / subject area.



6. Click **Paste**.

The mail comments page appears.



7. Enter the mail comments to be sent to all the project users and click .

The map is copied successfully into the subject area or the project and you can rename the map if required. You can now modify the child map as per your requirements. For an example, you can change the reference table, business rule, or add or remove columns etc.

For more information on mail comments, refer to the [Configuring Notifications](#) topic.

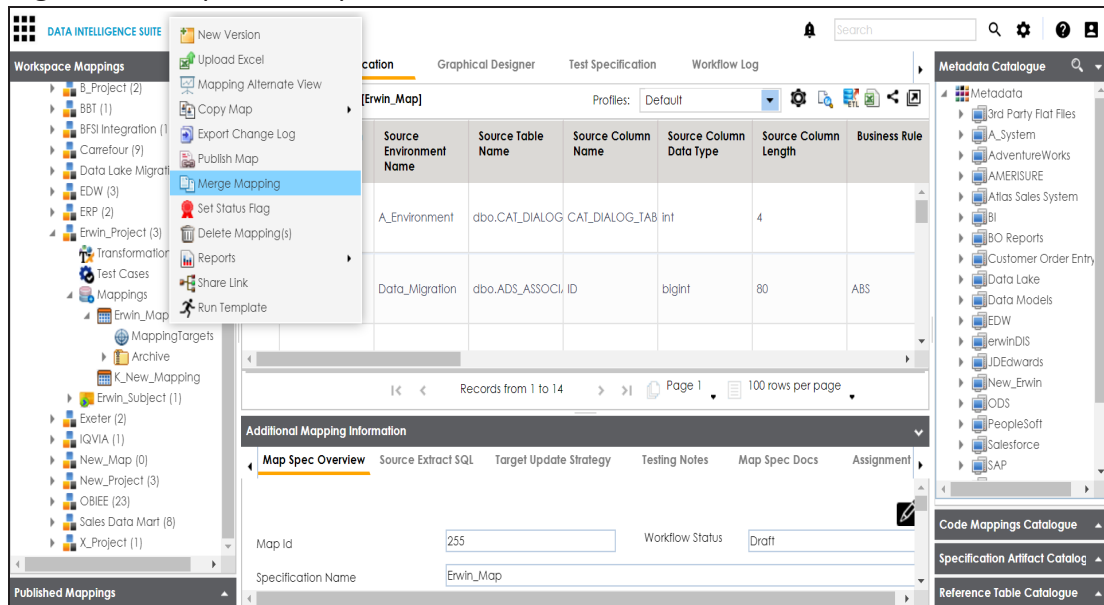
For more information on renaming mappings, refer to the [Updating Map Spec Overview](#) topic.

## Merging Changes into the Parent Mappings

After making the desired changes in the child map you can merge it with the parent mapping.

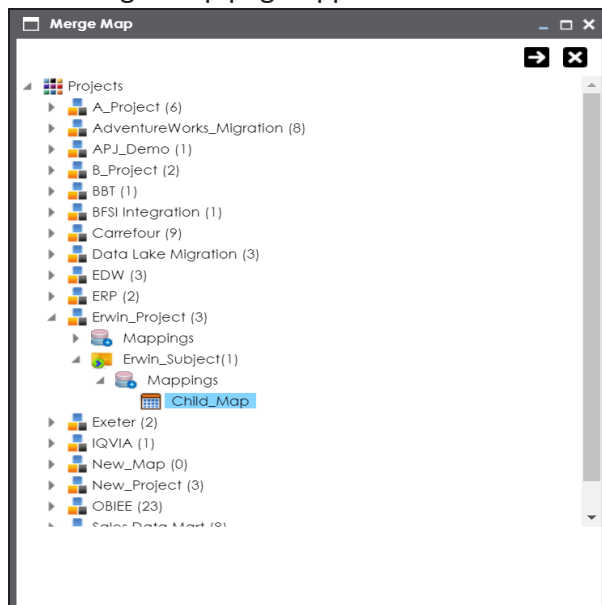
To merge the child map with the parent map, follow these steps:

1. Right-click the parent map.



2. Click **Merge Mapping**.

The Merge Map page appears.

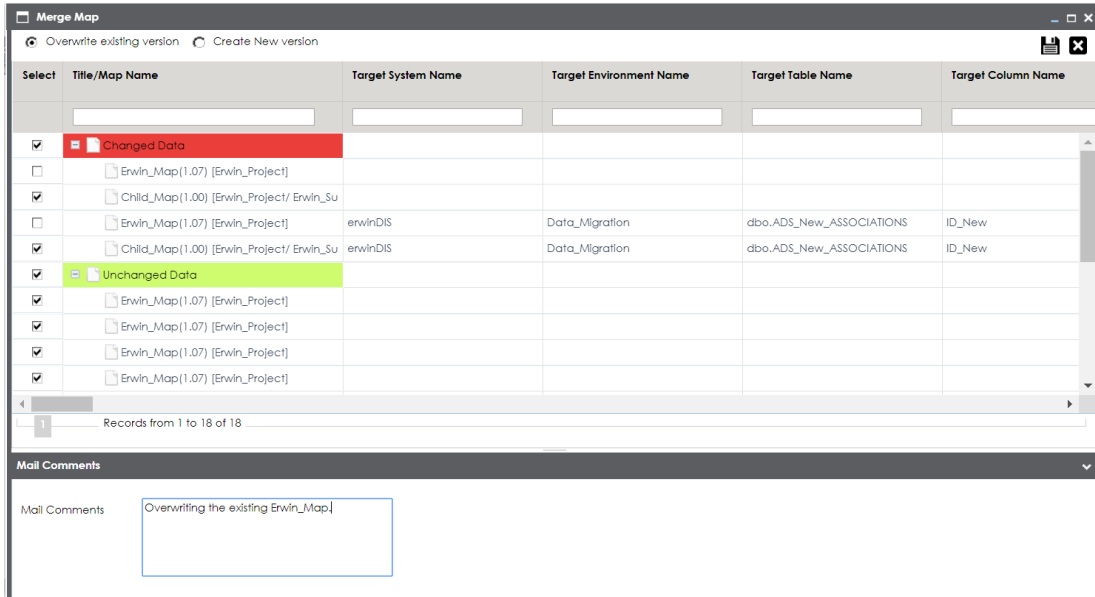


3. Select the child map to be merged with the parent map.

4. Click .

The following page appears showing the changed data with respect to the parent map. There are two options to include the changes:

- overwrite the parent map
- Create a new version of the parent map



Select	Title/Map Name	Target System Name	Target Environment Name	Target Table Name	Target Column Name
<b>Changed Data</b>					
<input checked="" type="checkbox"/>	Erwin_Map(1.07) [Erwin_Project]				
<input checked="" type="checkbox"/>	Child_Map(1.00) [Erwin_Project/ Erwin_Su]				
<input checked="" type="checkbox"/>	Erwin_Map(1.07) [Erwin_Project]	erwinDIS	Data_Migration	dbo.ADS_New_ASSOCIATIONS	ID_New
<input checked="" type="checkbox"/>	Child_Map(1.00) [Erwin_Project/ Erwin_Su]	erwinDIS	Data_Migration	dbo.ADS_New_ASSOCIATIONS	ID_New
<b>Unchanged Data</b>					
<input checked="" type="checkbox"/>	Erwin_Map(1.07) [Erwin_Project]				
<input checked="" type="checkbox"/>	Erwin_Map(1.07) [Erwin_Project]				
<input checked="" type="checkbox"/>	Erwin_Map(1.07) [Erwin_Project]				
<input checked="" type="checkbox"/>	Erwin_Map(1.07) [Erwin_Project]				

Records from 1 to 18 of 18

**Mail Comments**

Mail Comments: Overwriting the existing Erwin\_Map.

5. Use the following options:

#### Overwrite existing version

Select the **Overwrite existing version** to overwrite the existing version.

#### Create New Version

Select **Create New Version** to create new version of the parent map.

6. Enter relevant **Mail Comments** to be sent to the project users.

7. Click .

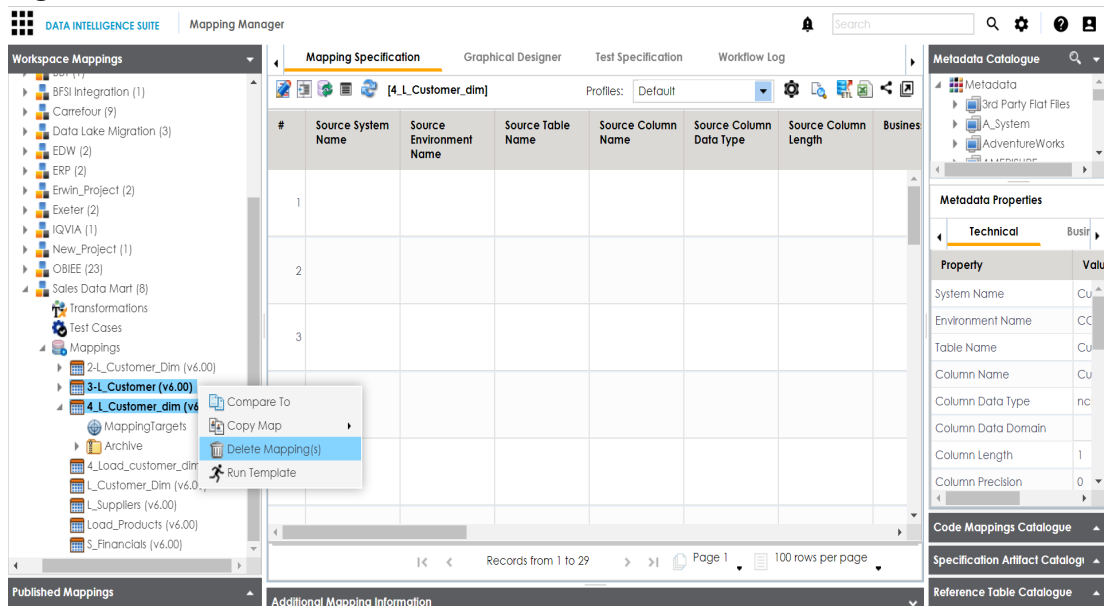
The parent map is merged.

For more information on mail comments, refer to the [Configuring Notifications](#) topic.

## Deleting Maps

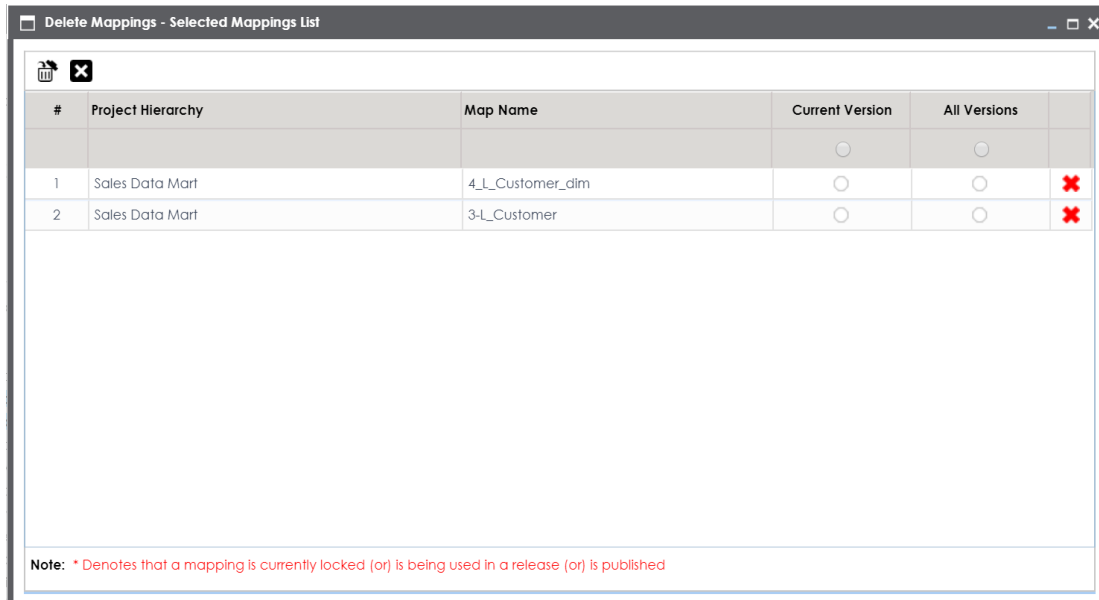
To delete maps, follow these steps:

1. Navigate to **Application Menu > Data Catalog > Mapping Manager**.
2. In **Workspace Mappings**, expand the **Mappings** node.
3. Expand the **Projects** node.
4. Expand the desired project.
5. Expand the **Mappings** node nested under the project.
6. Select the map / maps to be deleted.  
**Note:** Use shift key to select multiple maps.
7. Right-click the selection.



8. Click **Delete Mapping(s)**.

The Delete Mappings-Selected Mappings List page appears.



9. To remove mapping from the current selection, click ✗.

10. To delete all versions of the maps, select **All Versions** and click .

11. To delete current version of the maps, select **Current Version** and click .

The warning message appears.

12. Click **Yes**.

The mappings are deleted based on your choices.

## Viewing Workflow Logs

A default folder in the Workflow Manager contains a default workflow, Mapping\_Manager\_Default\_Workflow. This default workflow is applicable to all the projects in the Mapping Manager. You can create your own workflow and assign it to a project by overriding the existing workflow.

For more information on assigning workflow to projects, refer to the [Managing Mapping Manager Workflows](#) section.

To view workflow logs of mappings, follow these steps:



# 1. Go to Application Menu > Data Catalog > Mapping Manager.

The following page appears.

#	Project Name	Project Description	Project Owner	Subjects Count	Mapping Count	Created By	Created Date Time	Last Modified By	Last Modified Date
1	ERP			0	3	Administrator	2018-09-14 10:50:13.287	Administrator	2018-10-05 10:15:04.817
2	EDW			0	3	Administrator	2018-10-05 10:15:11.797	Administrator	2018-10-05 10:15:11.797
3	Sales Data Mart			0	8	Administrator	2018-10-05 10:15:26.093	Administrator	2018-10-05 10:15:26.093
4	BFSI Integration			0	1	Administrator	2018-10-05 10:15:36.237	Administrator	2018-10-05 10:15:36.237
5	Data Lake Migration			3	3	Administrator	2018-10-05 10:16:26.903	Administrator	2018-10-05 10:16:26.903
6	OBIEE			3	23	Administrator	2018-10-09 12:44:16.943	Administrator	2018-10-19 06:11:28.09
7	AdventureWorks			0	8	Administrator	2018-10-19 06:11:28.09	Administrator	2018-10-19 06:11:28.09
8	Carrefour			12	9	Administrator	2018-11-07 01:00:25.593	Administrator	2018-11-07 01:00:25.593
9	IQVIA			0	1	Administrator	2018-11-19 11:54:46.0	Administrator	2018-11-19 11:54:46.0
10	Exeter			0	2	Administrator	2018-12-04 11:30:53.793	Administrator	2018-12-04 11:30:53.793
11	BBT			0	1	Administrator	2018-12-21 06:54:27.687	Administrator	2019-08-16 23:00:00.000

## 2. Expand the desired project.

## 3. Click the desired map.

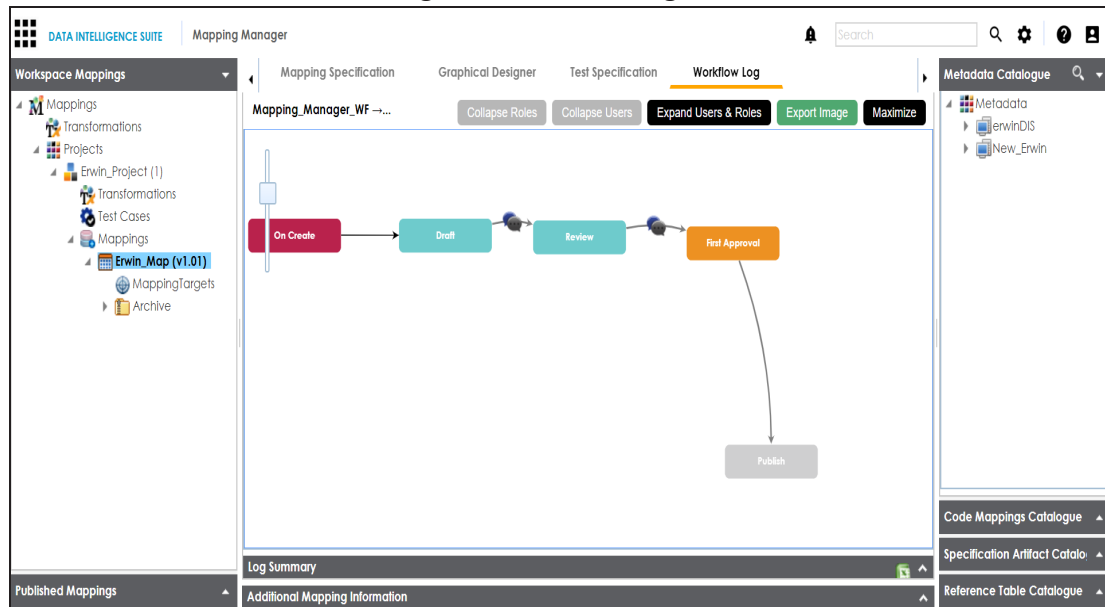
The following page appears.


#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_ID	bigint	8	ABS
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_ID	bigint	8	ABS
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT_ID	bigint	8	ABS

4. Click **Workflow Log**.

The current workflow log status of the selected map is shown.

**Note:** The current workflow stage blinks in the diagram.



5. To view the user and the comments entered by the user while moving it to the next stage, hover over .
6. To view users and roles assigned to all the stages, click **Expand Users and Roles**.
7. To download the workflow log image, click **Export Image**.

## Analyzing Mappings

This section walks you through how to analyze source to target mappings in different ways. Mapping Manager allows you to track forward and reverse lineages with the help of expressive reports. You can perform impact analysis on tables and columns as a target and as a source. Further, it is possible to preview data from actual databases, generate virtual preview of target data and view mapping statistics.

Analyzing mappings involves:

- [Generating virtual preview of target](#)
- [Running impact analysis](#)

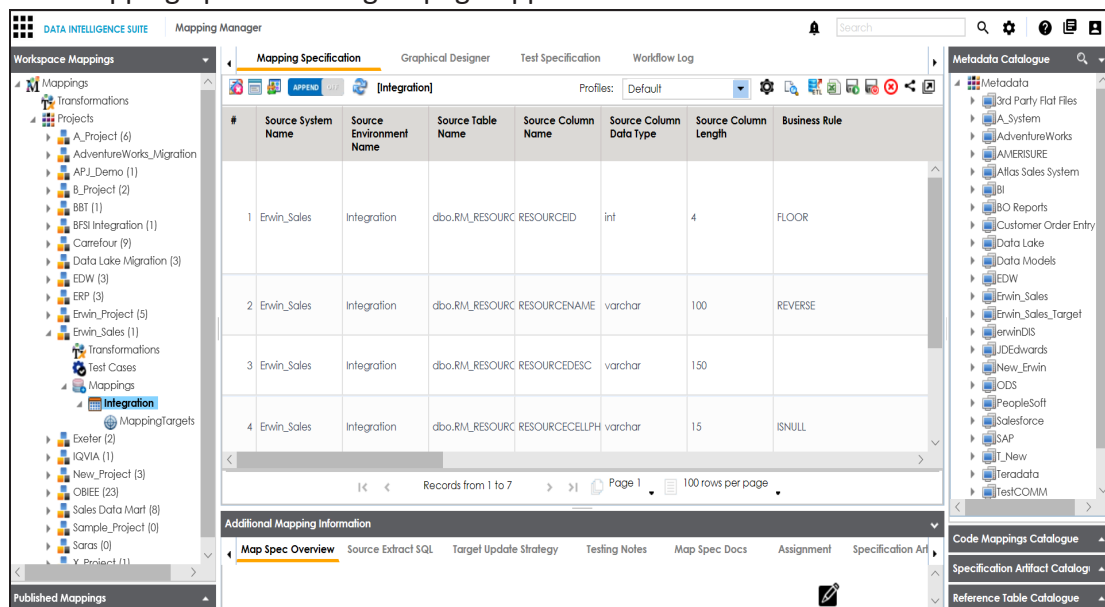
- [Running lineage analysis](#)
- [Running end to end lineage](#)
- [Viewing mapping statistics](#)

## Generating Virtual Preview of Target

To generate a virtual preview of the target based on the source and transformation, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Click the required map .

The Mapping Specification grid page appears.



#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	Erwin_Sales	Integration	dbo.RM_RESOURCE	RESOURCEID	int	4	FLOOR
2	Erwin_Sales	Integration	dbo.RM_RESOURCE	RESOURCENAME	varchar	100	REVERSE
3	Erwin_Sales	Integration	dbo.RM_RESOURCE	RESOURCEDESC	varchar	150	
4	Erwin_Sales	Integration	dbo.RM_RESOURCE	RESOURCECELLPH	varchar	15	ISNULL

Additional Mapping Information

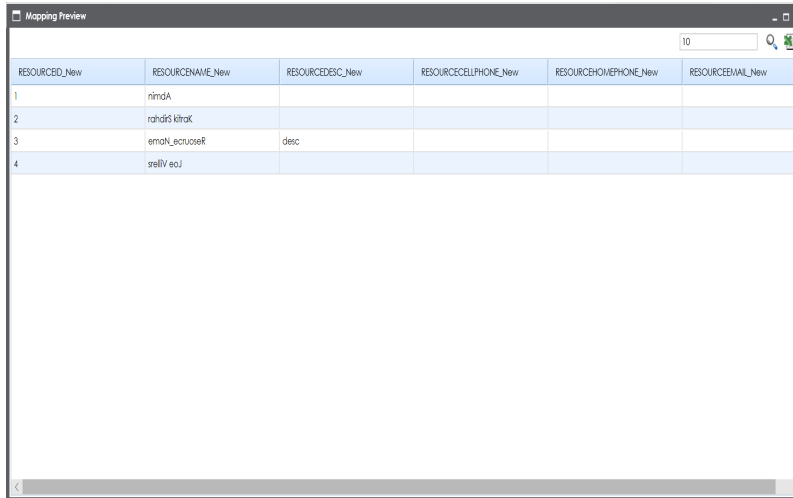
Map Spec Overview | Source Extract SQL | Target Update Strategy | Testing Notes | Map Spec Docs | Assignment | Specification Art

4. Click .

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

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

CONCAT, LTRIM, RTRIM, TRIM, CEIL, FLOOR, RPAD, LPAD, ROUND, SQRT, SUBSTR, UPPER, LOWER, TRUNC, SIN, COS, TAN, SINH, TANH, REVERSE, IS\_DATE, IS\_NUMBER, IS\_SPACES, ISNULL, IIF, ISEMPTY, NVL, DECODE.



RESOURCEID_New	RESOURCEID_New	RESOURCEID_New	RESOURCEID_New	RESOURCEID_New	RESOURCEID_New
1	nmdA				
2	rahd5 ktrk				
3	emal\ecucseik	desc			
4	relIV eoJ				

- To download the mapping preview, click .

## Running Impact Analysis

You can run impact analysis using the mapping specification grid on:

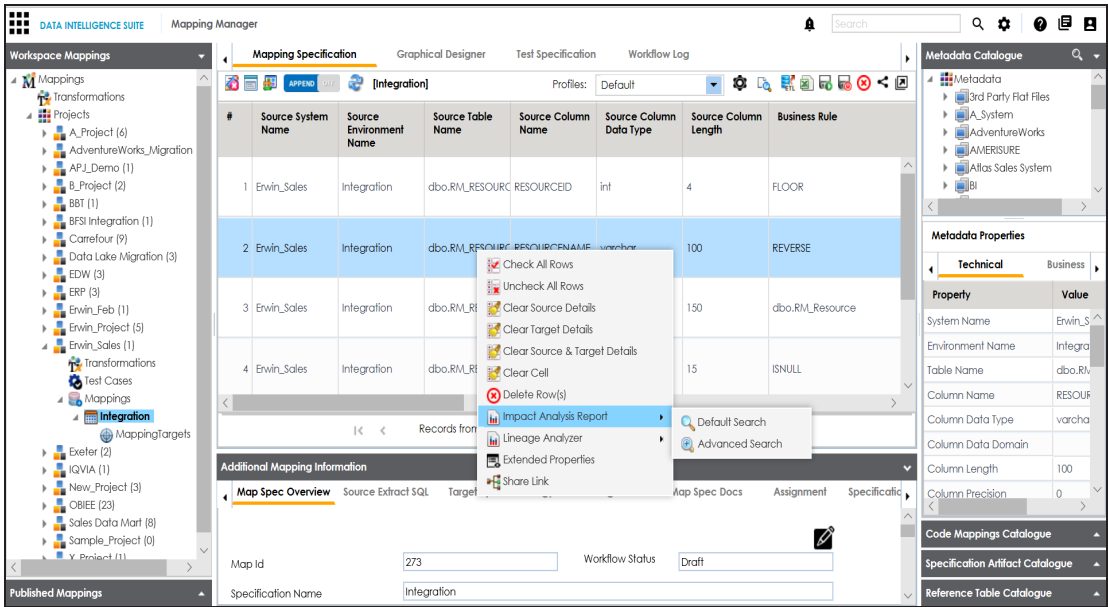
- Any source / target table
- Any source / target column

You can also export the impact analysis report in .pdf or .xlsx format.

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

- Go to **Application Menu > Data Catalog > Mapping Manager**.
- Under the **Workspace Mappings** pane, expand the desired project.
- Click the desired map.  
The Mapping Specification grid appears.
- Select the desired row.

5. Right-click the Target or Source table / column.



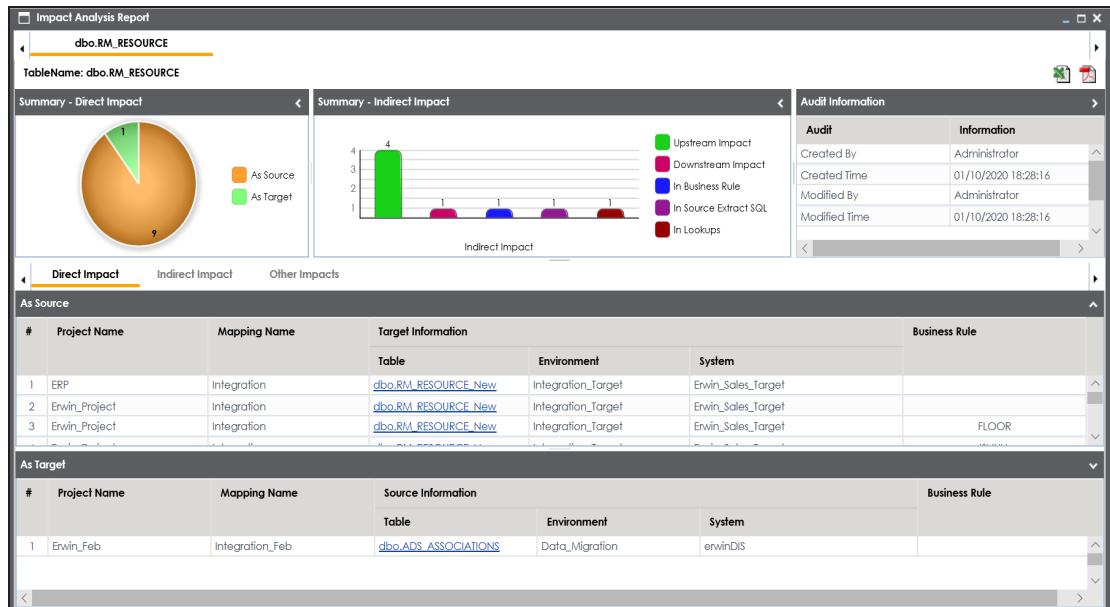
6. Hover over **Impact Analysis Report**.

7. Use the following options:

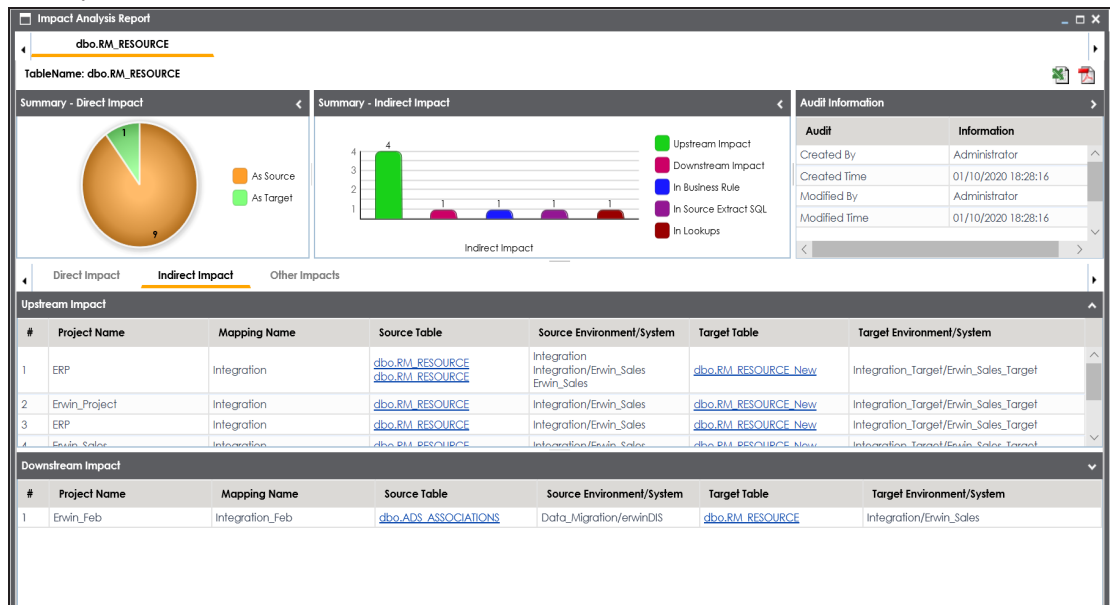
**Default Search**

Use this option to view the default report. The default report includes all the mappings into consideration while generating the report.

**Direct Impact:** It displays the impact of table / column as a source and as a target.

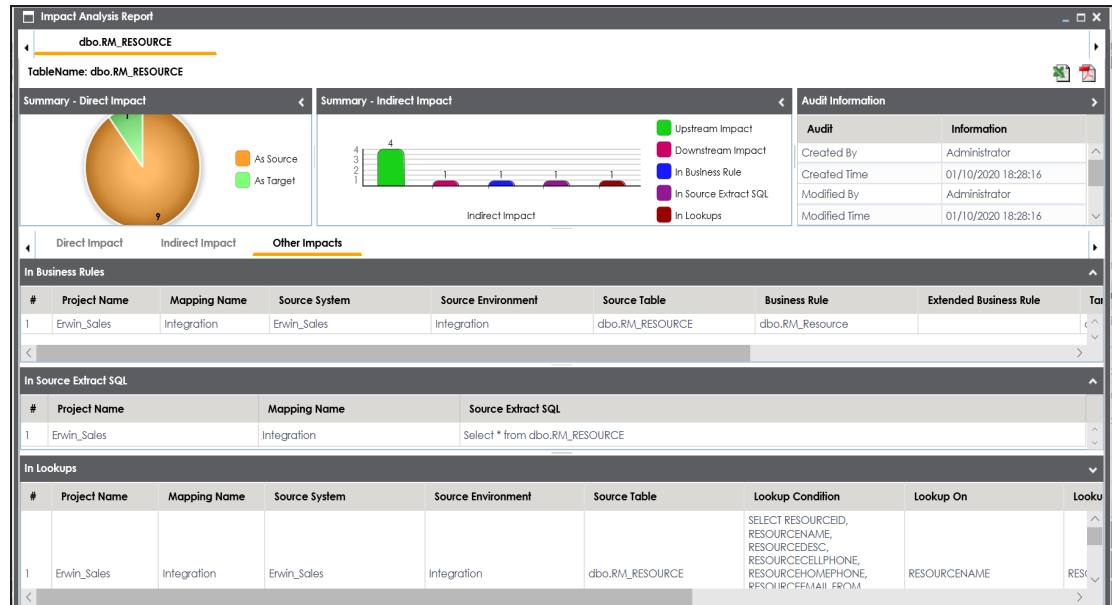


**Indirect Impact:** It displays the upstream impact and downstream impact of a table / column.



**Other Impacts:** It displays the impact of the table / column in:

- Business rules
- Source Extract SQL
- In Lookups



## Advanced Search

Use this option to customize the impact analysis report by including or excluding other mappings.

**Impact Analysis Report**

**Load Passive Mappings**   **Load All Mappings**

**Active Mappings**

- Projects
  - A\_Project (6)
  - AdventureWorks\_Migration (8)
  - APJ\_Demo (1)
  - B\_Project (2)
  - BBT (1)
  - BFSI Integration (1)
  - Carrefour (9)
  - Data Lake Migration (3)
  - EDW (3)
  - ERP (3)
  - Erwin\_Feb (1)
  - Erwin\_Project (5)
  - Erwin\_Sales (1)
  - Exeter (2)
  - IQVIA (1)
  - New\_Project (3)
  - OBIEE (23)
  - Sales Data Mart (8)
  - Sample\_Project (0)
  - X\_Project (1)

**Impact Analysis Criteria**

Impact Analysis Criteria

System Name :

Environment Name :

Table Name :


**Impact Analysis Usage**

☒ In Source  
☒ In Target  
☒ In Trans Lookup Condition & Lookup Column  
☒ In Business Rule  
☒ In Source Extract Sql


☒ ☐


**Load Passive Mappings / Load Active Mappings:** Use this option to load passive mappings.

**Load All Mappings:** Use this option to load all mappings.

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

The report is displayed.

8. Click  to export the report in .xlsx format.

9. Click  to export the report in .pdf format.

## Running Lineage Analysis

You can run forward or reverse lineage analysis using the mapping specification grid on:

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

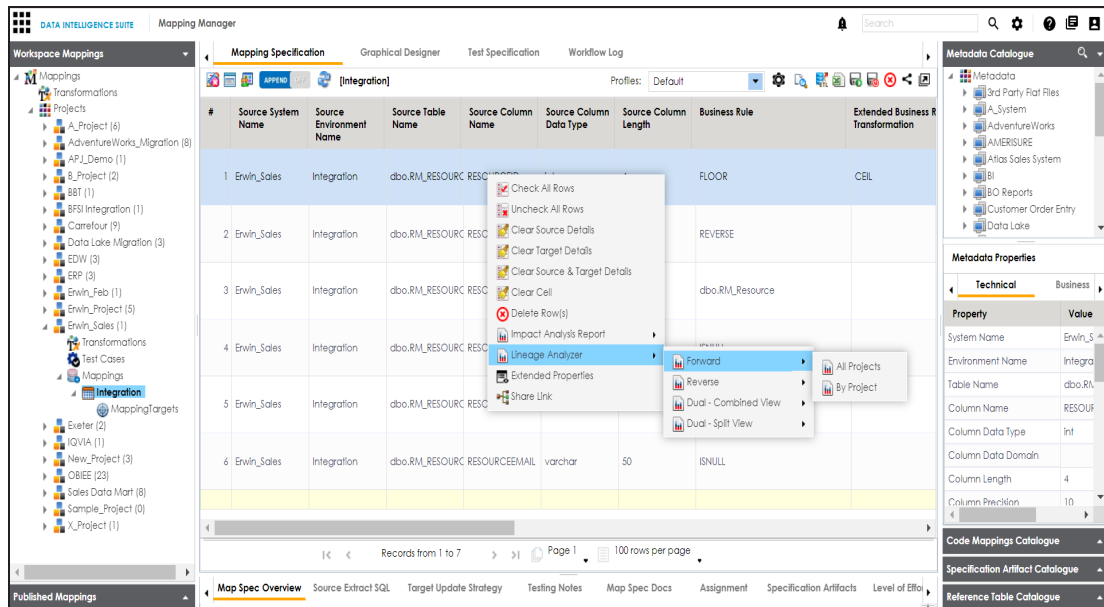
To run forward lineage report at table / column level, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Click the desired map.

The Mapping Specification grid appears.

4. Select the desired row.
5. Right-click the target or source table name / column name cell.





6. Hover over **Lineage Analyzer**.

7. Hover over **Forward**.

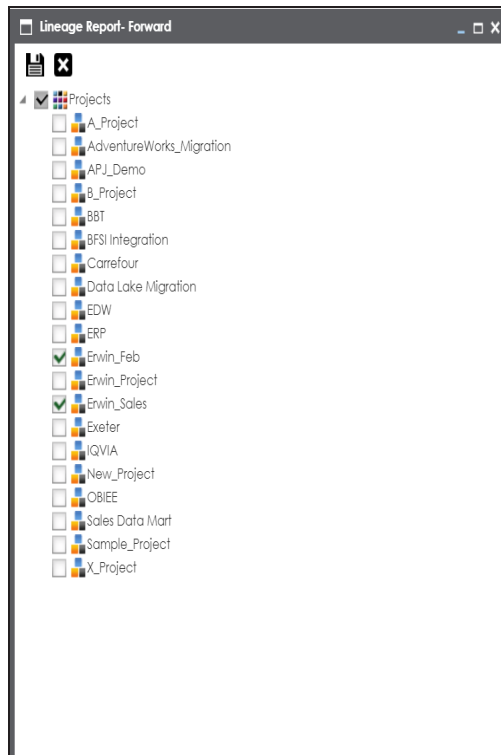
8. Use the following options:


### All Projects

Use this option to include all the projects in the Mapping Manager for the analysis.

### By Projects

Use this option to include or exclude projects in the Mapping Manager for the analysis.



Select the <project\_name> check box to include the project in the forward lineage analysis and click .

**Note:** You can select multiple projects.

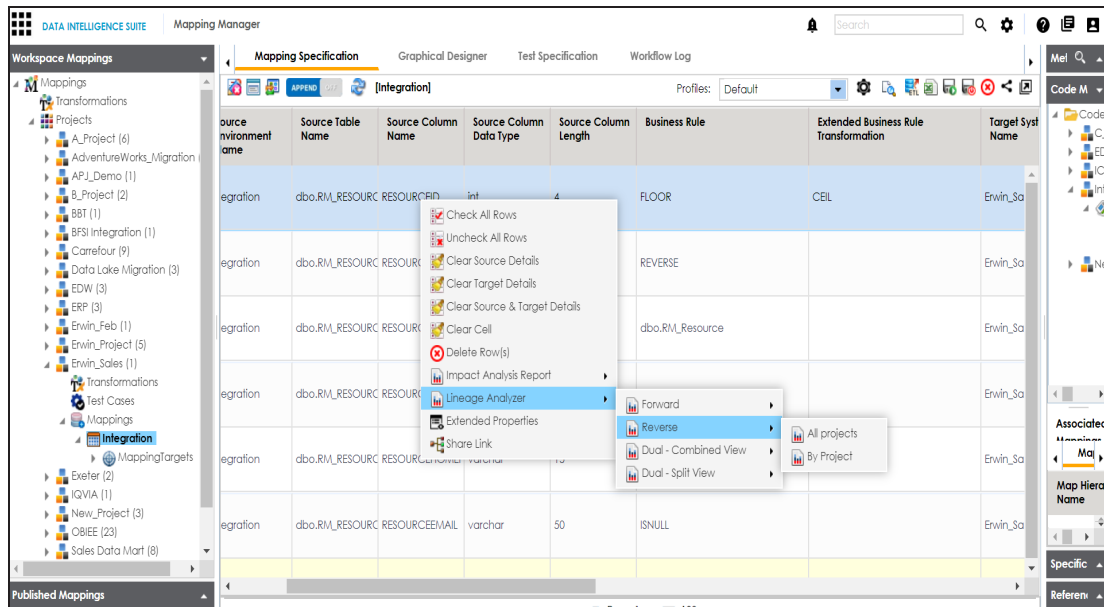
The forward lineage report appears.

To run reverse lineage report at table / column level, follow these steps:

1. Click the desired map.

The mapping specification grid appears.

2. Right-click the target or source table name / column name cell.
3. Hover over Lineage Analyzer.
4. Hover over Reverse.



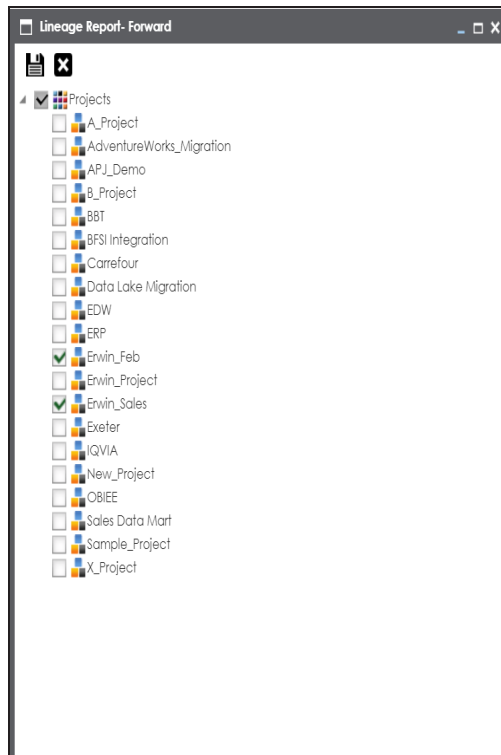
5. Use the following options:


### All Projects

Use this option to include all the projects in the Mapping Manager for the analysis.

### By Projects

Use this option to include or exclude projects in the Mapping Manager for the analysis.



Select the <project\_name> check box to include the project in the reverse lineage analysis and click .

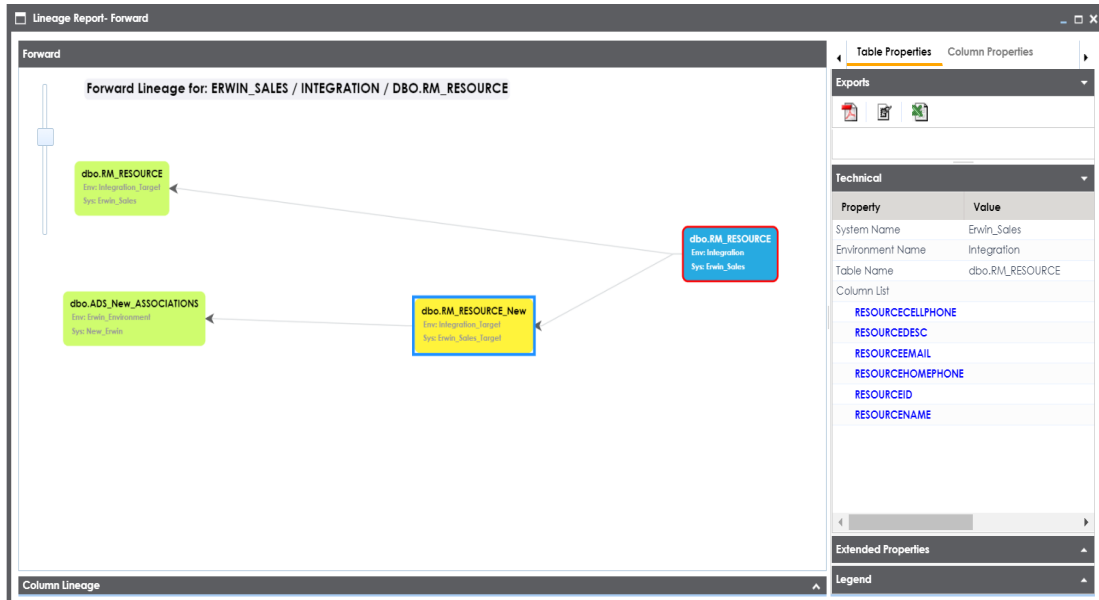
**Note:** You can select multiple projects.

The reverse lineage report appears.


You can use **Dual - Combined View** to view the dual lineage of a table / column and **Dual Split View** to view forward and reverse lineage of a table / column in two different tabs.


### Lineage Reports of Tables


The lineage analysis report of a table appears like this:



### Exports:

To export the report in .pdf format, click .

To export the report in .jpg format, click .

To export the report in .xlsx format, click .

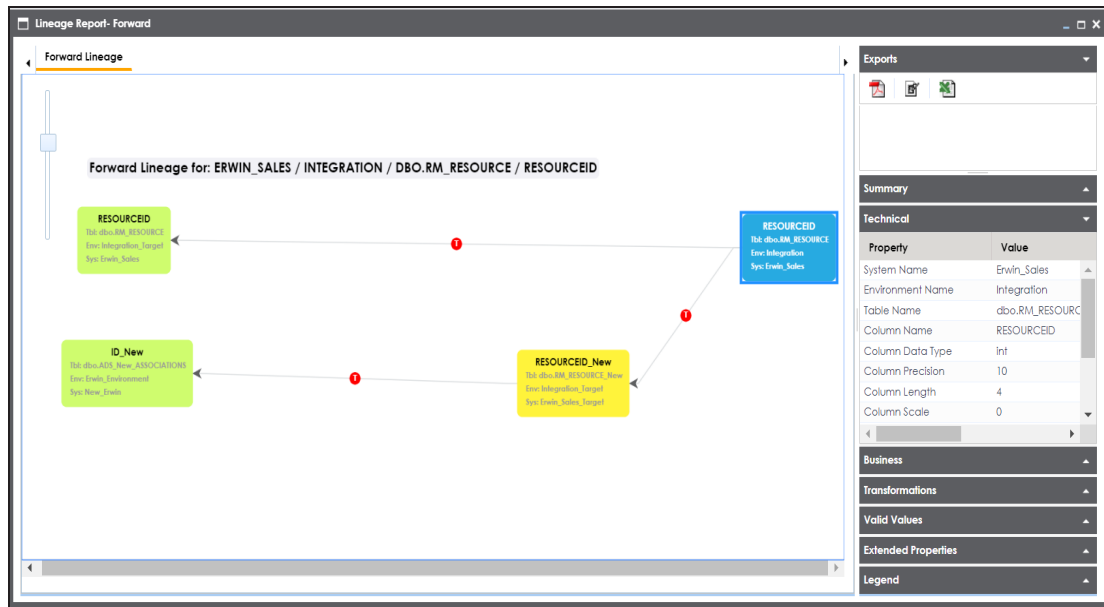
**Technical:** Use this pane to view the technical properties of the table.

**Extended Properties:** Expand this pane to view the extended properties of the table configured by you.


Legen

### Lineage Reports of Columns


The lineage report of a column appears like this:



### Exports:

To export the report in .pdf format, click .

To export the report in .jpg format, click .

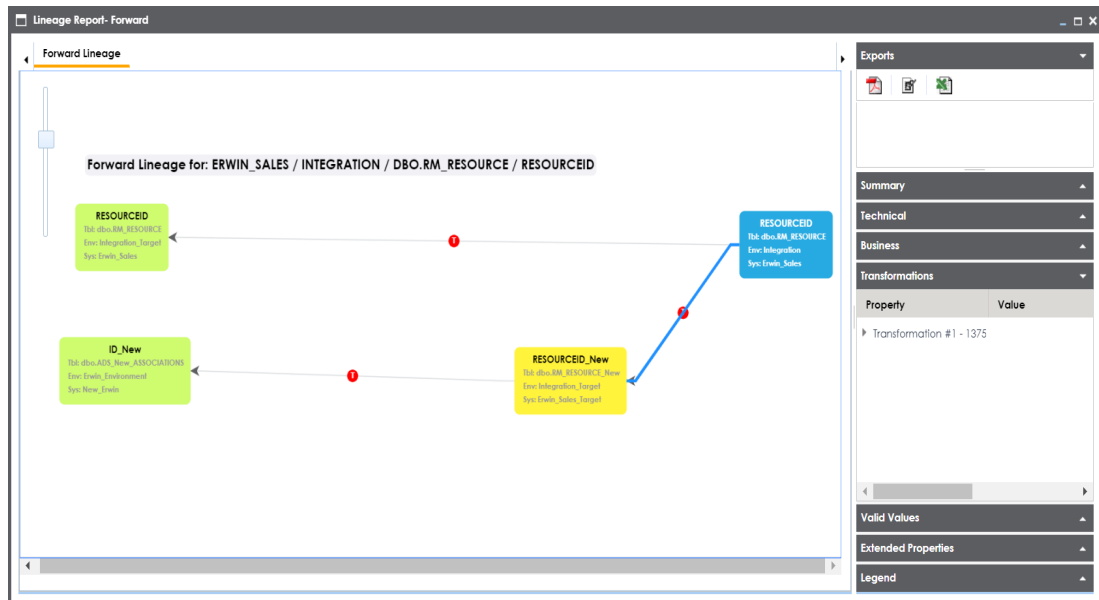
To export the report in .xlsx format, click .

**Technical:** Use this pane to view the technical properties of the column.

**Business:** Use this pane to view the business properties of the column.

**Transformations:** Use this pane to view the transformations involved in various lineage links.

To view the transformation, click the desired lineage link.



**Valid Values:** Expand this pane and click the hyperlink to view Codeset Valid Values. You can assign Codesets to a column in the Metadata Manager.

**Extended Properties:** Expand this pane to view the extended properties of the column.

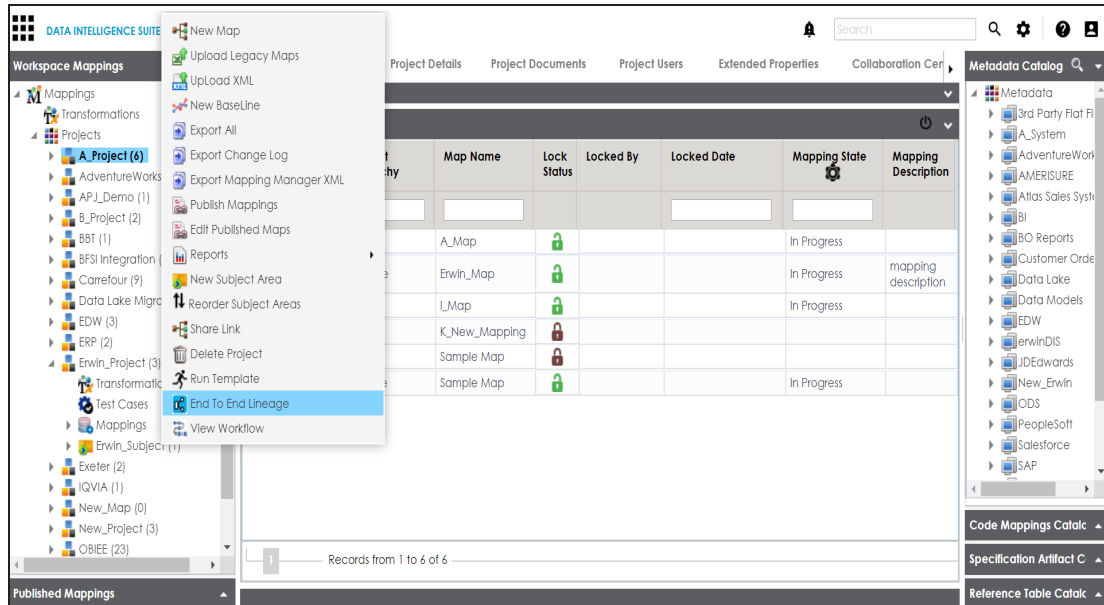
**Legend:** Expand this pane to view the legend used in the report.

## Running End to End Lineage

You can run end to end lineage on a project as source and specify the target project. You can also export the lineage report in .xlsx format.

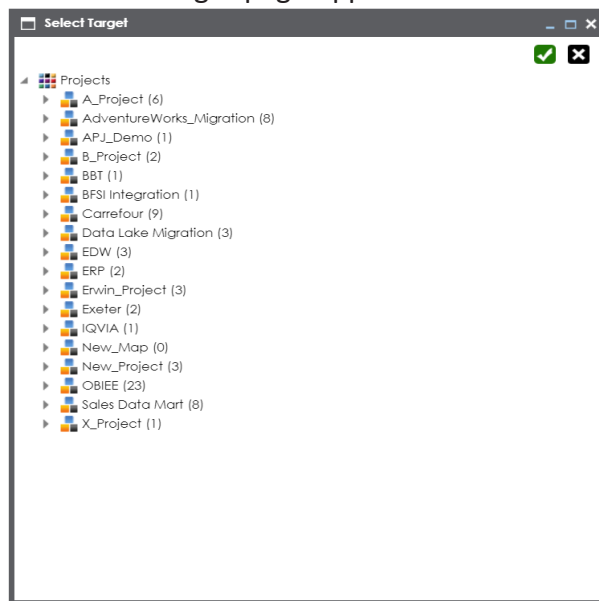
To run end to end lineage at project level, follow these steps:

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



3. Click **End to End Lineage**.

The Select Target page appears.



4. Select a target Subject or a target Project.

5. Click .



The End to End Lineage Summary page appears.

End To End Lineage Summary												
#	Source Project	Source Subject	Source System	Source Environment	Source Table	Source Column	Source XPath	Source User Defined-1	Source User Defined-2	Source Valid Values	Target Column	Target
1	Erwin_Project		3rd Party Flat Files	3rd Party Flat Files	dbo.ADS_ASSOCIATION	TARGET_OBJECT_ID				<a href="#">Click Here</a>		
2	Erwin_Project		3rd Party Flat Files	3rd Party Flat Files	dbo.ADS_ASSOCIATION	TARGET_OBJECT_TYPE_ID				<a href="#">Click Here</a>		
3	Erwin_Project		3rd Party Flat Files	3rd Party Flat Files	dbo.ADS_ASSOCIATION	RELATIONSHIP				<a href="#">Click Here</a>		
4	Erwin_Project		3rd Party Flat Files	3rd Party Flat Files	dbo.ADS_ASSOCIATION	ID				<a href="#">Click Here</a>		
5	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	ID				<a href="#">Click Here</a>	F_ID_New	
6	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	ID				<a href="#">Click Here</a>	F_ID_New	
7	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	RELATIONSHIP				<a href="#">Click Here</a>	F_ID_New	
8	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	RELATIONSHIP				<a href="#">Click Here</a>	N_RELATIONSHIP_New	
9	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_New_ASSOCIATION	TARGET_OBJECT_ID_New				<a href="#">Click Here</a>		
10	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_ID				<a href="#">Click Here</a>	S_SOURCE_OBJECT_ID	
11	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_New_ASSOCIATION	TARGET_OBJECT_TYPE_ID				<a href="#">Click Here</a>		
12	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_ID				<a href="#">Click Here</a>		
13	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_New_ASSOCIATION	RELATIONSHIP_New				<a href="#">Click Here</a>		
14	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	ID				<a href="#">Click Here</a>		
15	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_TYPE_ID				<a href="#">Click Here</a>	F_ID_New	
16	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_ID				<a href="#">Click Here</a>		
17	Erwin_Project		New_Erwin	Erwin_Environment	dbo.ADS_ASSOCIATION	SOURCE_OBJECT_TYPE_ID				<a href="#">Click Here</a>	K_SOURCE_OBJECT_TYPE	



6. Use  or  to navigate across the report.

7. To expand the lineage summary, use .

The End to End Lineage Details page appears.

End To End Lineage Details [ Source: TARGET\_OBJECT\_ID Target: ]

#	Project Name	Map Id	Map Name	Source System	Source Environment	Source Table	Source Column	Source XPath	Source Valid Values	Business Rule	Extended Business Rule	Target Valid Values	Target XPath	Target
1	Erwin_Project	233	Erwin_Map	3rd Party Flat	3rd Party Flat	dbo.ADS_ASSOCIATION	TARGET_OBJECT_ID		<a href="#">Click Here</a>	ABS		<a href="#">Click Here</a>		TARGET
2	A_Project	248	K_New_Mapp	3rd Party Flat	3rd Party Flat	dbo.ADS_New_ASSOCIATION	TARGET_OBJECT_ID_New		<a href="#">Click Here</a>			<a href="#">Click Here</a>		L_TARGET

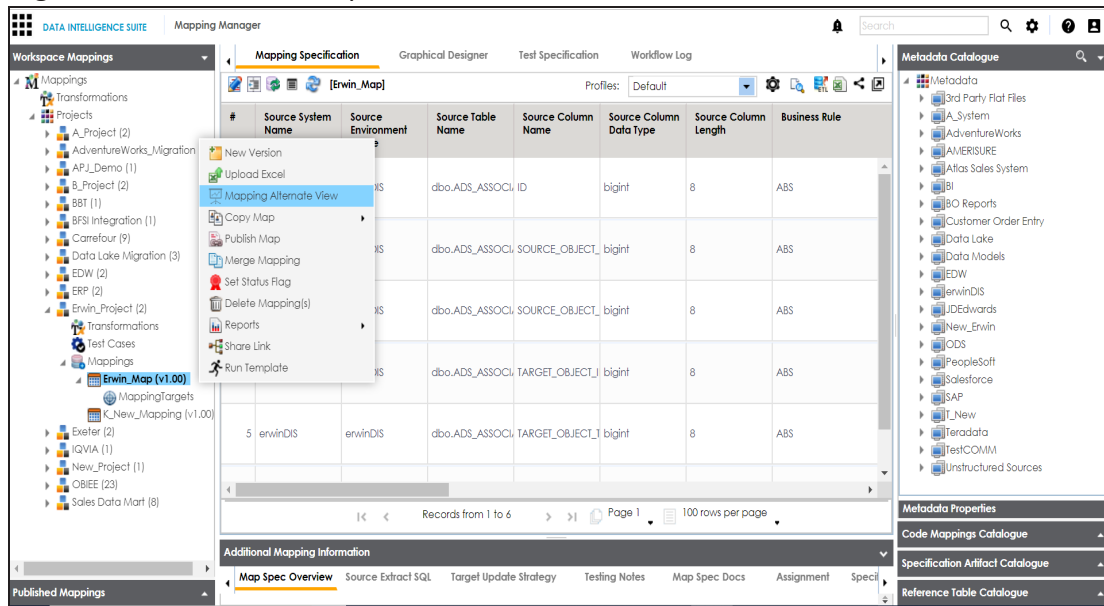
8. To reset column ordering, click .
9. To export the report, click .

## Business View Mapping

You can have a concise view of the mappings with an ability to instantly generate lineage and impact analysis. This is an alternate view for both workspace and published maps.

To open business view of the mappings, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project node.
3. Expand the **Mappings** node.
4. Right-click the desired map.



5. Click **Mapping Alternate View**.

The Mapping Summary page appears.

Mapping Summary

Mapping Details

Specification Name	Erwin_Map	Map Id	221
Version	1.00	Version Label	
Mapping Description	mapping description		
Target Tables	dbo.ADS_New_ASSOCIATIONS	Source Tables	dbo.ADS_ASSOCIATIONS
SQL Query		SQL Query Description	
Target Update Strategy		Map Spec Docs	<a href="#">View</a>
Graphical View	<a href="#">View</a>	Extended Properties	<a href="#">View</a>
User Defined1		User Defined2	
User Defined3		User Defined4	
User Defined5	<a href="#">View all User Defined Details</a>		

Mapping Specification

Target Details						Transformations			
#	Info	System	Environment	Table	Column	Data Type (L/P/S)	Business Rule	Extended Business Rule	System
1		New_Erwin	Erwin_Environment	dbo.ADS_New_ASSOCIATIONS	ID_New	bigint(8,19,0)	ABS		erwinDIS
2		New_Erwin	Erwin_Environment	dbo.ADS_New_ASSOCIATIONS	SOURCE_OBJECT_ID_New	bigint(8,19,0)	ABS		erwinDIS
3		New_Erwin	Erwin_Environment	dbo.ADS_New_ASSOCIATIONS	SOURCE_OBJECT_TYPE_ID	bigint(8,19,0)	ABS		erwinDIS
4		New_Erwin	Erwin_Environment	dbo.ADS_New_ASSOCIATIONS	TARGET_OBJECT_ID_New	bigint(8,19,0)	ABS		erwinDIS
5		New_Erwin	Erwin_Environment	dbo.ADS_New_ASSOCIATIONS	TARGET_OBJECT_TYPE_ID	bigint(8,19,0)	ABS		erwinDIS


Records from 1 to 6

Page 1


100 rows per page

6. Use the following options:

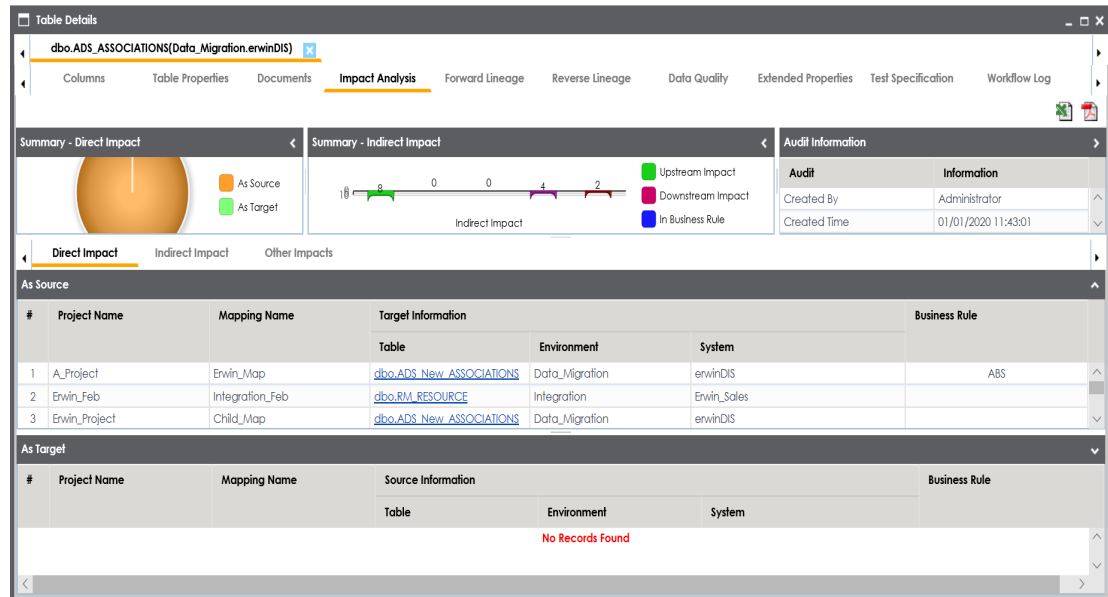
**Export** ()

To download the mapping summary, click .

**Share Link** ()

To share the link of the mapping summary, click .

7. Click a table name which appears as hyperlink and use the following options:  
The Table Details page appears showing the Impact Analysis of the table.



### Forward Lineage

Use this option to view the forward lineage of the table.

### Reverse Lineage

Use this option to view the reverse lineage of the table.

### Data Quality

Use this option to profile the data in the table and generate various data profile reports. For more information on profiling data, refer to the [Profiling Data at Table Level](#) topic.

### Extended Properties

Use this option to view the extended properties of the table.

### Test Specification

Use this option to view test cases related to the table.

### Workflow Log

Use this option to view the workflow status of the table.

## Column

Use this option to list columns of the table.

## Table properties

Use this option to view the table properties.

## Documents

Use this option to add documents related with the table.

8. Click a column which appears as hyperlink and use the following options:

The Column Details page appear showing the Impact Analysis of the column.

Column Details

ID(dbo.ADS\_ASSOCIATIONS.Data\_Migration.erwinDIS)

Column Properties Documents **Impact Analysis** Forward Lineage Reverse Lineage Extended Properties Valid Values Workflow Log

Summary - Direct Impact Summary - Indirect Impact Audit Information

As Source

#	Project Name	Mapping Name	Target Information	Business Rule
			Column Table Environment System	
1	A_Project	Erwin_Map	ID_New dbo.ADS_New_ASSOCIATIONS Data_Migration erwinDIS	ABS
2	Erwin_Feb	Integration_Feb	RESOURCEID dbo.RM_RESOURCE Integration Erwin_Sales	
3	Erwin_Project	Child_Map	ID_New dbo.ADS_New_ASSOCIATIONS Data_Migration erwinDIS	

As Target

#	Project Name	Mapping Name	Source Information	Business Rule
			Column Table Environment System	
No Records Found				

## Forward Lineage

Use this option to view the forward lineage of the column.

## Reverse Lineage

Use this option to view the reverse lineage of the column.

## Extended Properties

Use this option to view the extended properties of the column.

## Valid Values

Use this option to view the associated codesets with the column.

**Workflow Log**

Use this option to view the workflow log status of the column.

**Column Properties**

Use this option to view the column properties.

**Documents**

Use this option to view the uploaded documents related to the column.

## Viewing Mapping Statistics

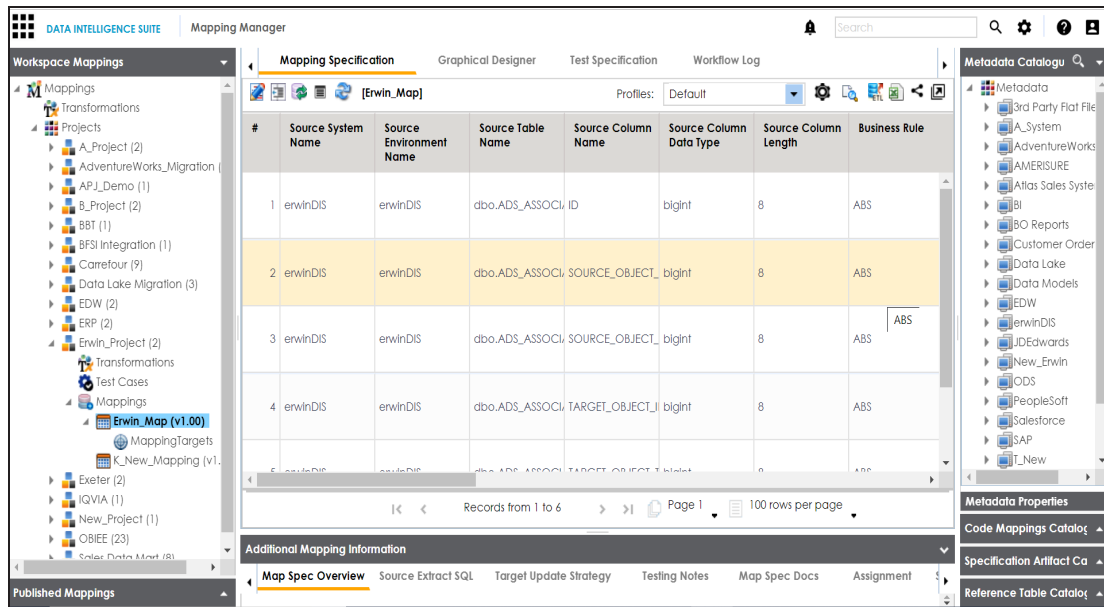
You can view mapping statistics and view the following information:

- Total rows in the mapping grid
- Number of target tables
- Targets not mapped
- Sources not mapped
- Business rule
- Lookups

To view mapping statistics, follow these steps:

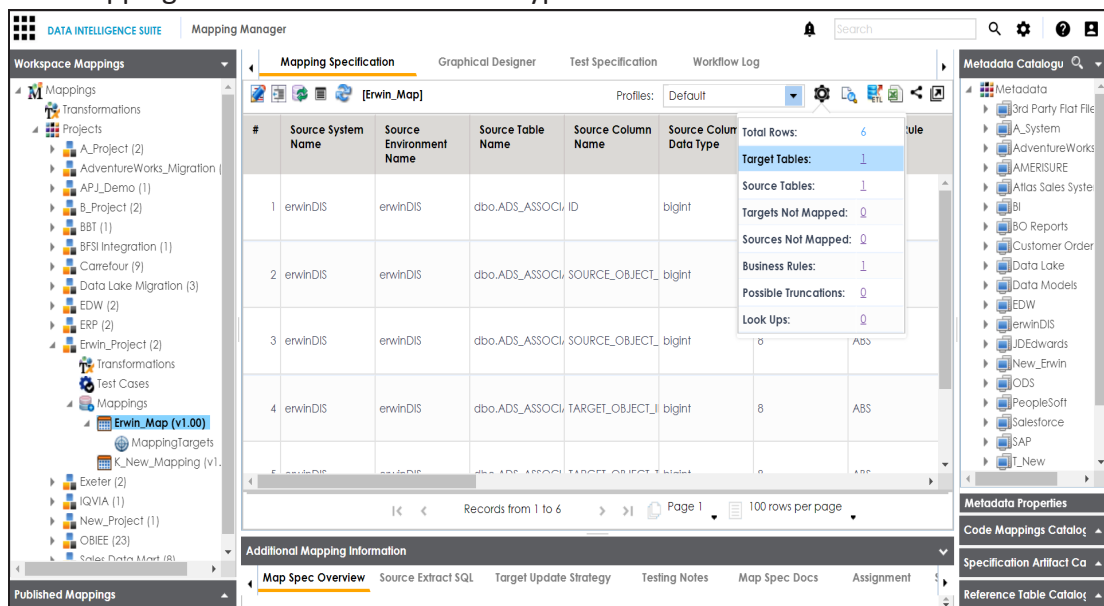
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Click the desired map.

The Mapping Specification grid appears.



4. click .

The mapping statistics are shown with hyperlinks.



**Note:** Click the hyperlinks to get the detailed information.

## Associating Mappings

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

- Code Mappings or Code Crosswalks
- Reference Tables
- Requirements

It involves:

- [Associating code maps with data item mappings](#)
- [Associating reference tables with mappings](#)
- [Linking requirements with mappings](#)

## Associating Code Mappings with Data Item Mappings

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

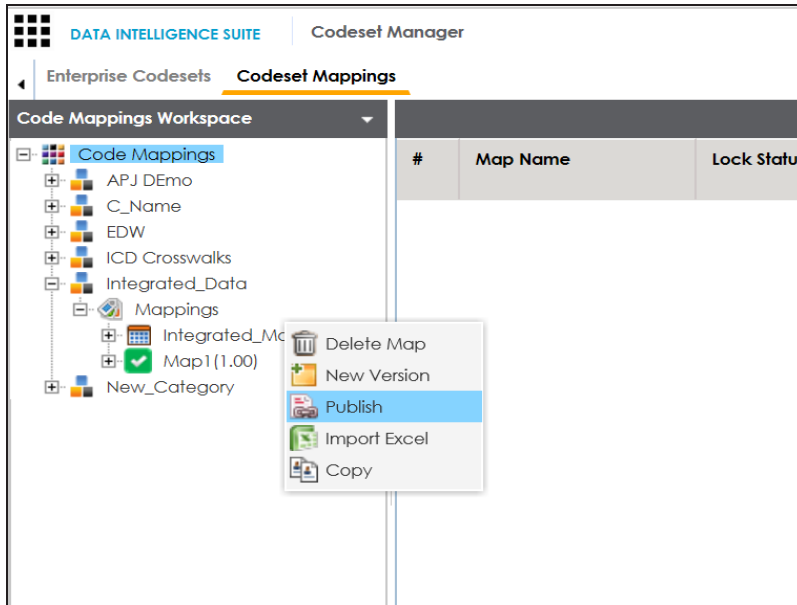
Associating code mappings with data item mappings involves:

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

To publish code maps, follow these steps:

1. Go to **Application Menu > Data Catalog > Codeset Manager > Codeset Mappings**.
2. Under the **Code Mappings Workspace** pane, expand the category node created by you.
3. Expand the **Mappings** node.
4. Right-click the code map.





**Publish Codeset Map** page appears.

The 'Publish Codeset Map' dialog box contains the following fields and values:

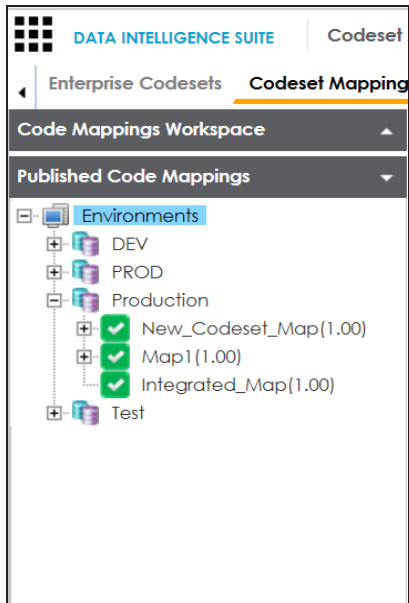
- Codeset Map Name\***: Integrated\_Map
- Codeset Map Version**: 1.01
- Codeset Map Description**: Code map when source and target have different code values.
- Map Version Label**: (empty)
- Map Changed Description\***: Updated Code Values.
- Publish Environment\***: DEV (selected from a list including PROD, Production, and Test)

5. Enter Codeset Map Description, Map Version Label, Map Changed Description and select the [Publish Environment](#).

6. Click .

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

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

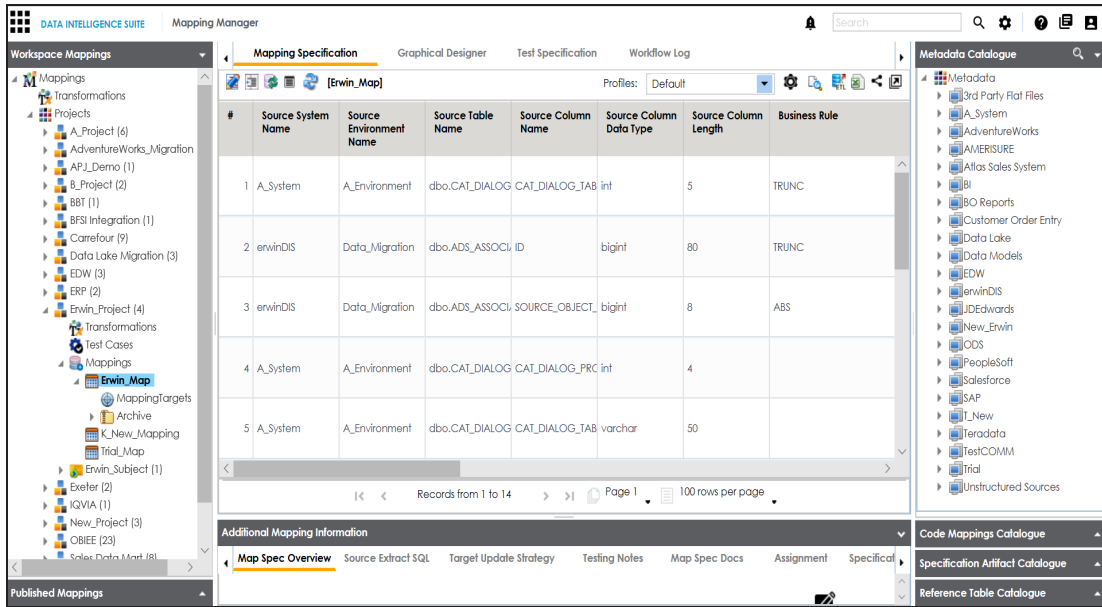


A published code map can be associated with a mapping in the Mapping Manager. The published code map is available under the Code Mappings Catalogue.

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

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Click the desired map.

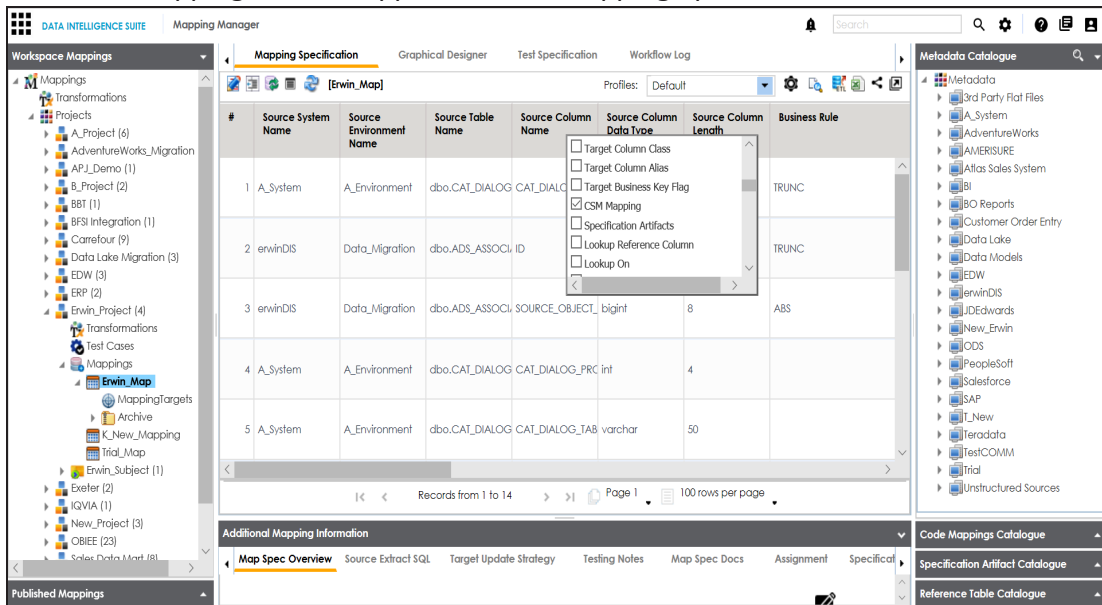
The center pane shows the mapping specification.



4. In **Mapping Specification**, click .

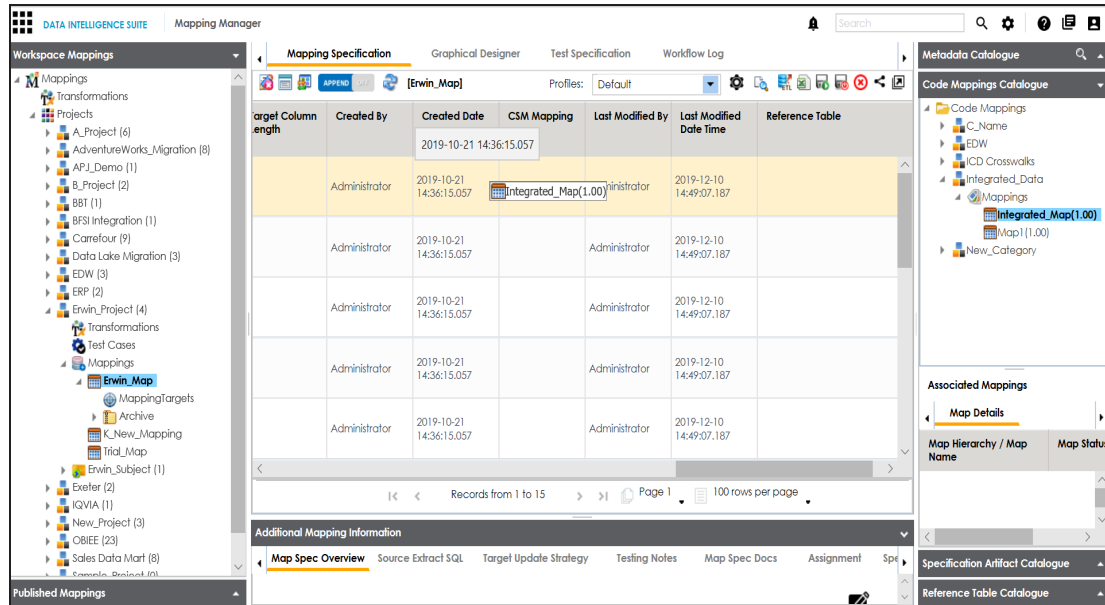
5. Right-click **Header Menu** and select the **CSM Mapping** check box.

The CSM Mapping Column appears in the Mapping Specification.



6. On right pane, expand the **Code Mapping Catalogue**.

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



9. In **Mapping Specification**, Click .

The code map is associated with the data item mappings.

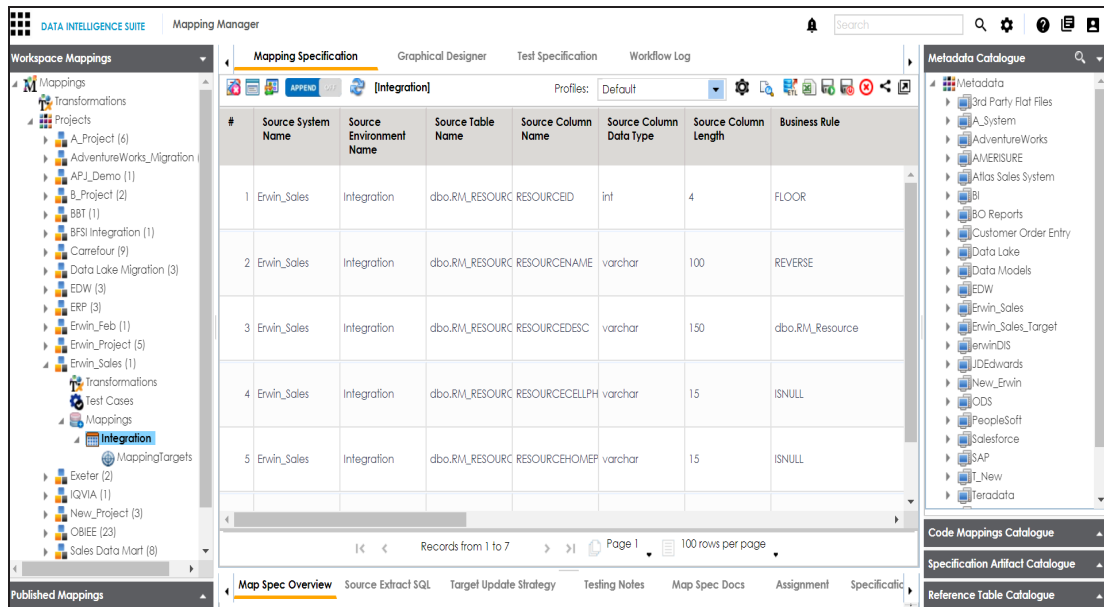
## Associating Reference Tables with Mappings

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

To associate reference tables with Mappings, follow these steps:

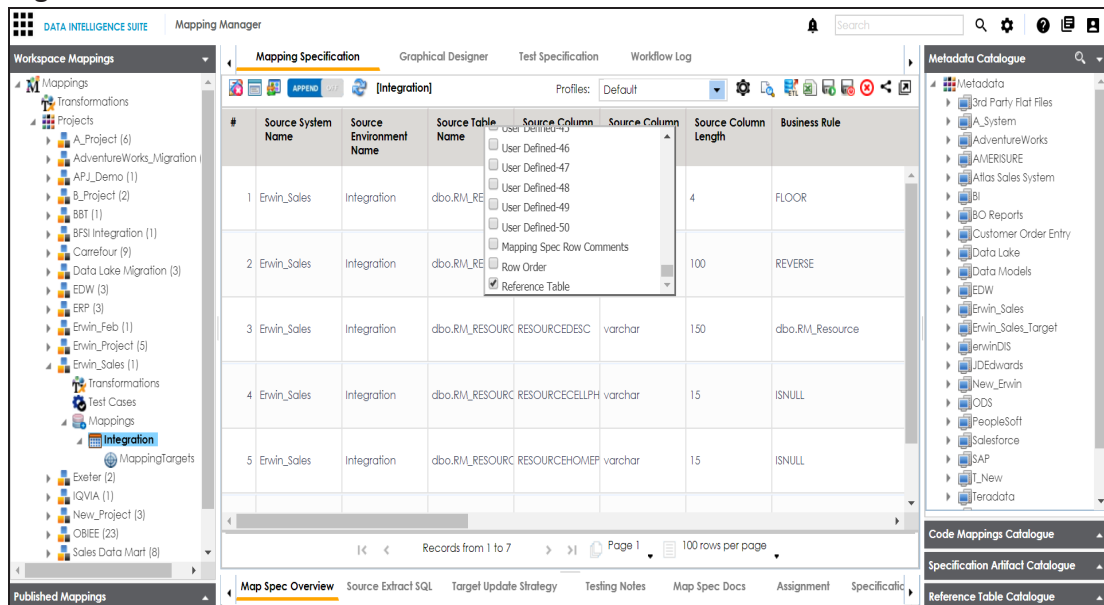
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, the desired project.
3. Expand the **Mappings** node and click the desired mappings.

The Mapping Specification grid appears.



4. Click .

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



The **Reference Table** column becomes visible in **Mapping Specification** grid.

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

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

The screenshot shows the Mapping Manager interface. On the left is the 'Workspace Mappings' tree. The main area displays the 'Mapping Specification' table. The table has columns: Target Column Data Type, Target Column Length, Created By, Created Date, Last Modified By, Last Modified Date Time, and Reference Table. The first row is highlighted in yellow and has 'T\_NAME (1.01)' in the Reference Table column. On the right is the 'Reference Table Catalogue' pane, which shows a tree structure with 'T\_NAME (1.01)' selected.

Target Column Data Type	Target Column Length	Created By	Created Date	Last Modified By	Last Modified Date Time	Reference Table
nt	4	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-14 17:55:08.487	T_NAME (1.01)
varchar	100	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-14 15:02:42.913	
varchar	150	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-14 15:08:24.523	
varchar	15	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-13 12:26:07.163	
varchar	15	Administrator	2020-01-12 20:40:27.5	Administrator	2020-01-13 12:26:07.163	

- Click .

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

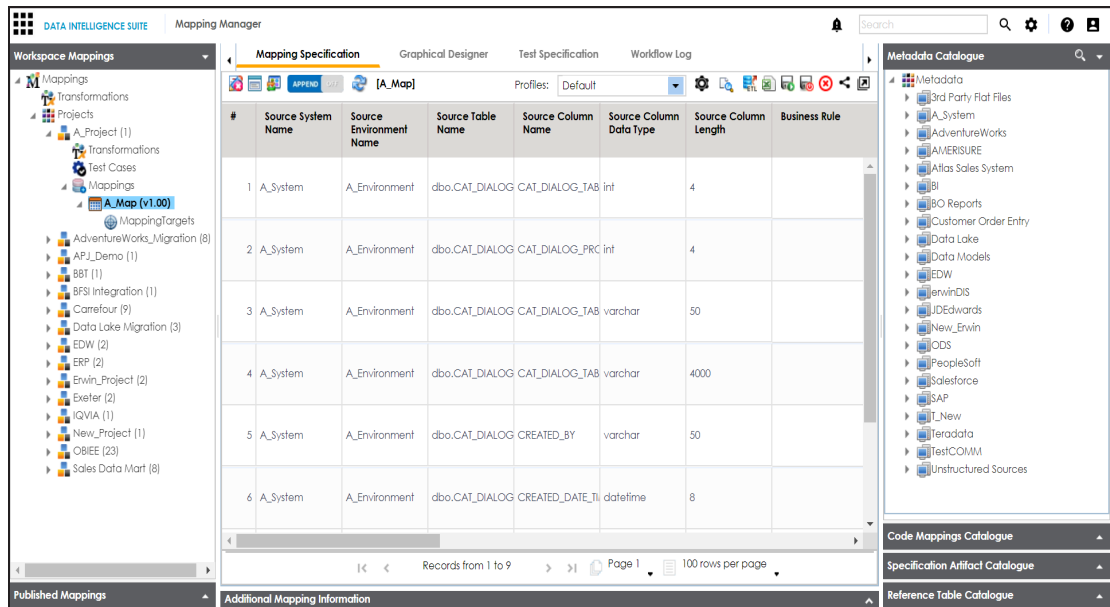
## Linking Requirements to Mappings

You can associate your functional requirements with data Mappings. This helps in enterprise level traceability between requirements and mappings.

To associate your functional requirements with mappings, follow these steps:

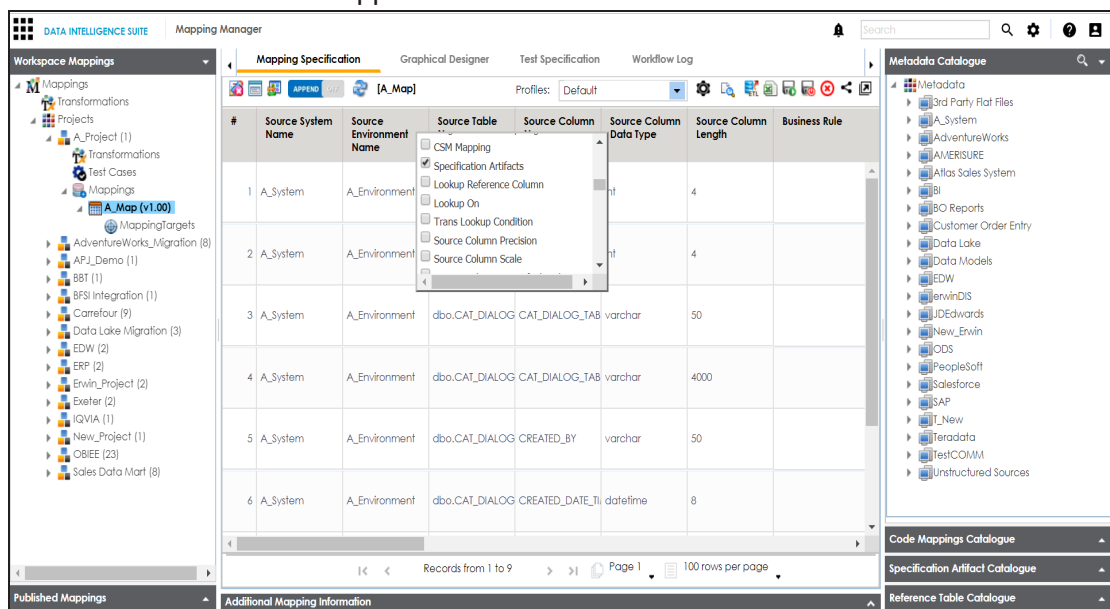
- Go to **Application Menu > Data Catalog > Mapping Manager**.
- Click the desired map.

The **Mapping specification** page appears.



3. In **Mapping Specification**, right click the **Header Menu**.

A list of **header columns** appears.



4. Scroll down the header column list and select the **Specification Artifact** check box.

**Specification Artifact** column becomes visible in the **Mapping Specification**.

5. In right pane, expand **Specification Artifact Catalogue**.
6. In **Specification Artifact Catalogue**, expand the project node which contains the desired specification.
7. Drag and drop the specification on the **Specification Artifacts** column in the desired row.

The screenshot shows the Mapping Manager application. The main window displays a table titled 'Mapping Specification' with columns: Column Type, Target Column Length, Created By, Created Date, Specification Artifacts, Last Modified By, and Last Modified Date Time. The table contains several rows of mapping data. On the right side, the 'Specification Artifact Catalogue' is expanded, showing a tree structure with nodes like 'EDW (0)', 'APJ (1)', 'Nasdaq PDLC (1)', 'ARCS (1)', 'P\_Name (1)', and 'Specifications'. The 'Specifications' node is further expanded, showing 'Sp\_Name (v1.00)'.

Column Type	Target Column Length	Created By	Created Date	Specification Artifacts	Last Modified By	Last Modified Date Time
	4	Administrator	2019-10-16 15:44:32.383	Sp_Name (v1.00)	Administrator	2019-10-17 11:56:07.883
	4	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353
ar	50	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353
ar	4000	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353
ar	50	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353
me	8	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353

8. Click .

Requirements are linked to the mappings.

## Publishing and Creating Versions of Mappings

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

It involves:

- [Creating versions of maps](#)
- [Creating base-line versions of maps](#)



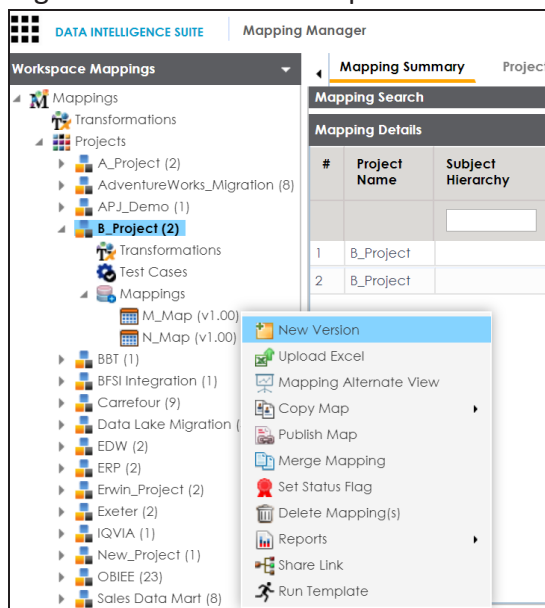
- [Comparing two different mapping versions](#)
- [Publishing mappings](#)
- [Restoring archived maps as active](#)

## Creating Versions of Maps

You can create new version of maps incorporating the changes made in the mapping specification. The older version is archived and it is in read-only mode. You can also notify all the project users about the creation of new version by entering mail comments.

To create versions of maps, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Right-click the desired map.



4. Click **New Version**.

The New Version page appears.

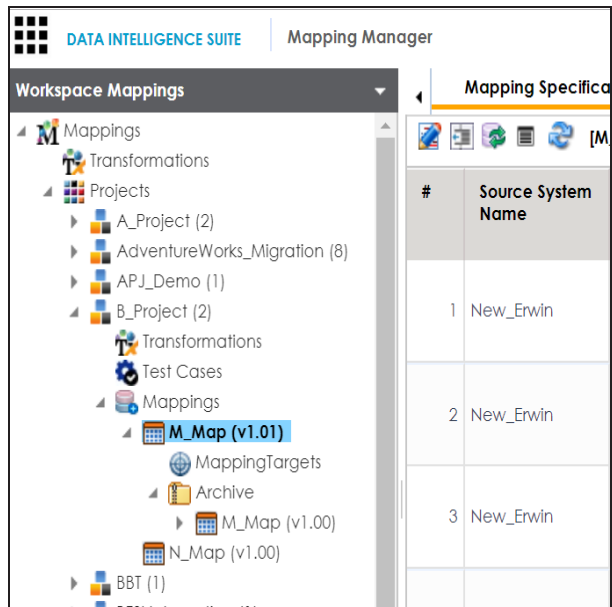
5. Enter the Mapping Description, Version Label, Changed Description and relevant Mail Comments.

**Note:** Mail comments are sent to all the project users from the admin email id. The admin email id can be configured in [Email Settings](#).

6. Click .

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

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

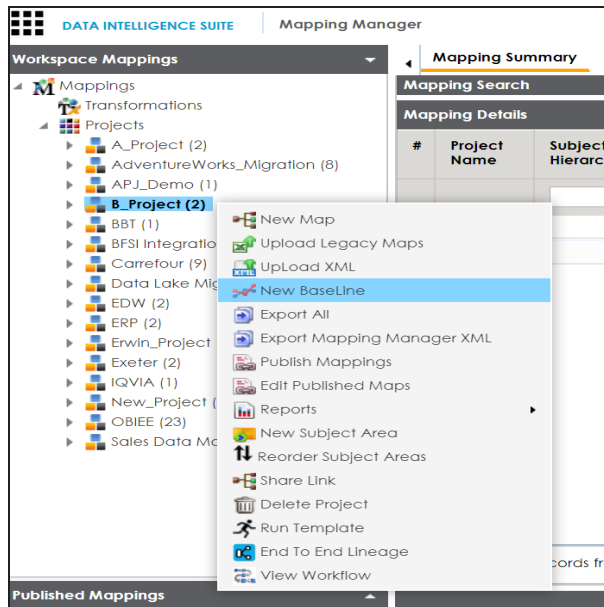


## Creating Base-Line Version of Maps

Base-Lining a project will bring all maps in the project to the same version. You can base-line all the maps in a project and record change description and notify all the project users by entering mail comments.

To base-line a project, follow these steps:

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



3. Click **New Baseline**.

The New Baseline page appears.

The screenshot shows the 'New Baseline' form window. It has a title bar with the text 'New Baseline' and standard window controls. The form contains three main sections: 'Version Label' with a text input field; 'Change Description\*' with a rich text editor featuring a toolbar with icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and other text formatting options; and 'Mail Comments' with a large text area. In the top right corner of the form, there are icons for saving (a floppy disk) and closing (an 'X').

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

**Note:** Mail comments are sent to all the project users from the admin email id. The admin email id can be configured in [Email Settings](#).

5. Click .

The project is base-lined and all the maps in the project now have the same version.

## Comparing Two Different Mapping Versions

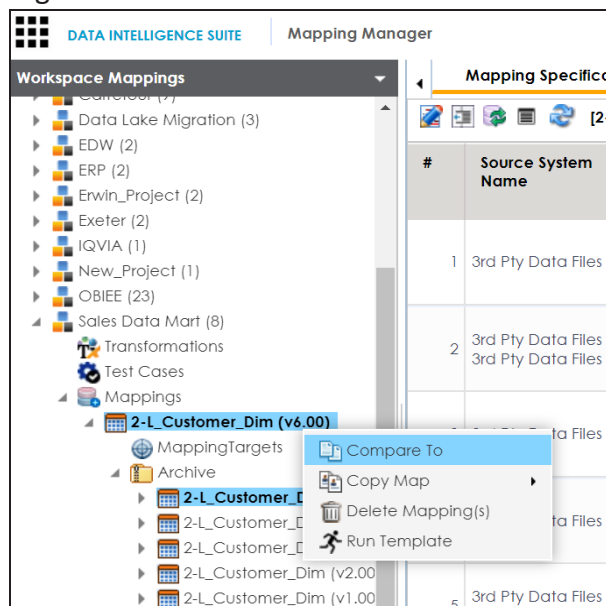
The advanced mapping comparison ability allows you to quickly and efficiently compare any two mappings. You can view the changes on a row by row basis.

To compare two different mapping versions, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project node.
3. Expand the **Mappings** node nested under the project.
4. Select the two mapping versions.

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

5. Right-click the selection.



6. Click **Compare To**.

The Compare To page appears.

Compare To

Exclude Common Rows Export:

Development Team

Map1 Name: 2-L\_Customer\_Dim (V6.00 / VLv4s)

Map2 Name: 2-L\_Customer\_Dim (V5.00 / VLv4s)




Source Details											
Version	System	Environment	Table	Column	Data Type	Length	Precision	Scale	Definition	Comments	Logical Column Name
6.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0			Customer Number		Customer Number
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0			Customer Number		Customer Number

Source Details											
Version	System	Environment	Table	Column	Data Type	Length	Precision	Scale	Definition	Comments	Logical Column Name
6.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0			Customer Number		Customer Number
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0			Customer Number		Customer Number

Source Details											
Version	System	Environment	Table	Column	Data Type	Length	Precision	Scale	Definition	Comments	Logical Column Name
6.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0			First Name		First Name
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0			First Name		First Name

Source Details											
Version	System	Environment	Table	Column	Data Type	Length	Precision	Scale	Definition	Comments	Logical Column Name
6.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0			First Name		First Name
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0			First Name		First Name

Source Details											
Version	System	Environment	Table	Column	Data Type	Length	Precision	Scale	Definition	Comments	Logical Column Name
6.00	3rd Pty Data Files	3rd Pty Data Files	Customers	Full Address	Varchar(50)	50.0			Customer full address		Customer full address
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	Full Address	Varchar(50)	50.0			Customer full address		Customer full address

All the changes are highlighted in red color and the report can be exported in the desired format by clicking  or  or .

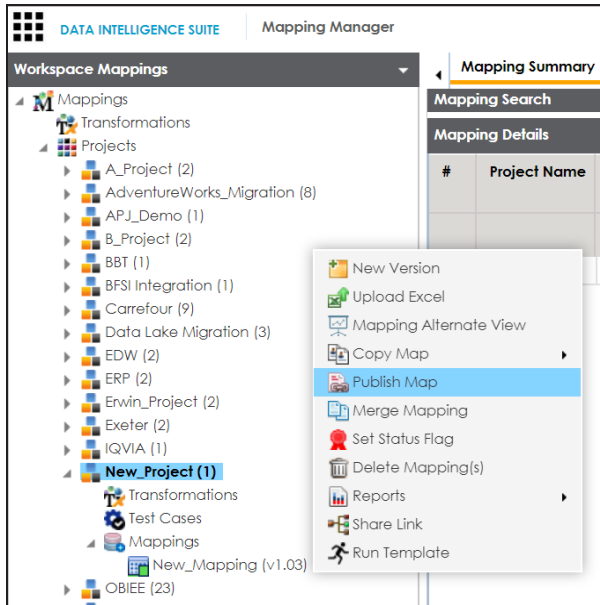
## Publishing Mappings

Before publishing mappings, please make sure that the source environment and the target environment have their corresponding production environments.

You can publish a map on an effective date and enter publishing notes.

To publish mappings, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Right-click the map to be published.




#### 4. Click **Publish Map**.

The Publish Map page appears.

The 'Publish Map' form is displayed. At the top, a message states: '\* Publishing the map will create a new version.' The form includes the following fields and sections:

- Mapping Name:** A text field containing 'New\_Mapping'.
- Mapping Version:** A text field containing '1.03'.
- Version Label:** An empty text field.
- Effective Date\*:** A date picker field.
- Change Description\*:** A rich text editor with a toolbar (bold, italic, underline, link, unlink, list, etc.) and a large text area.
- Publish Notes\*:** Another rich text editor with a similar toolbar and text area.

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

Field Name	Description
Mapping Name	It is autopopulated and you cannot edit this field.
Mapping Version	It tells about the version of the mapping specification. It is autopopulated you cannot edit this field.
Version Label	Enter a version label for the mapping.
Effective Date	Use  to enter the effective date of publishing.
Change Description	Enter a small change description in the mapping.
Publish Notes	Enter a small note about the publishing.

6. Click .

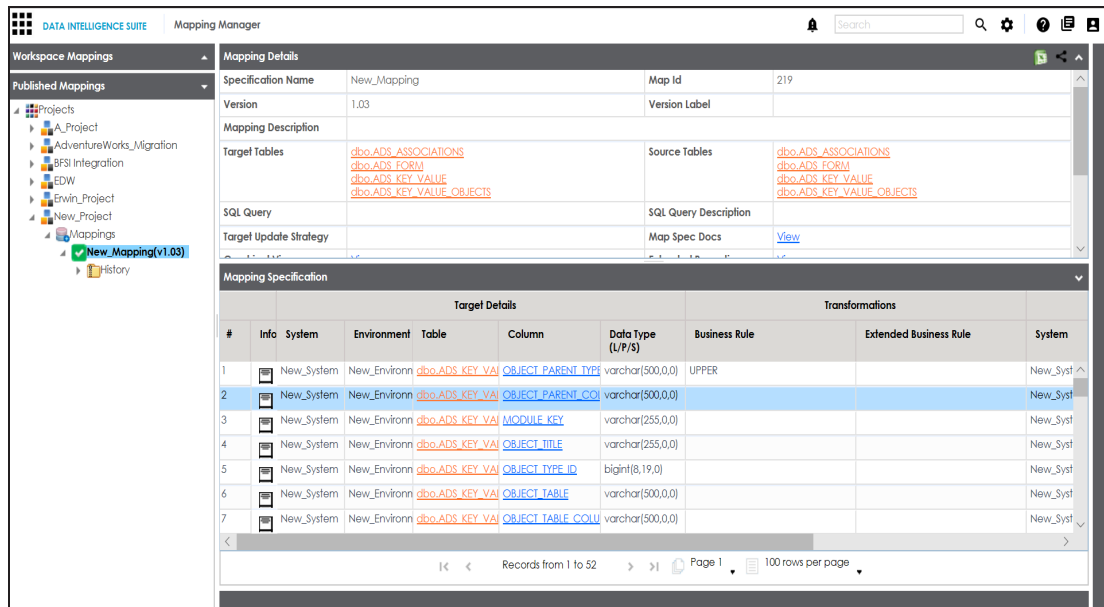
The mapping is published on the effective date and saved in **Published Mappings**. The source and the target environments in the published mapping are updated to their corresponding production environment. All previously published versions of the same mapping are stored in the History folder. A published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

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

7. Under the **Published Mappings** pane, click the published map to view Mapping Details and Mapping Specification.

The business view of the mapping appears which can be used to run impact analysis, lineage analysis, and data quality etc.



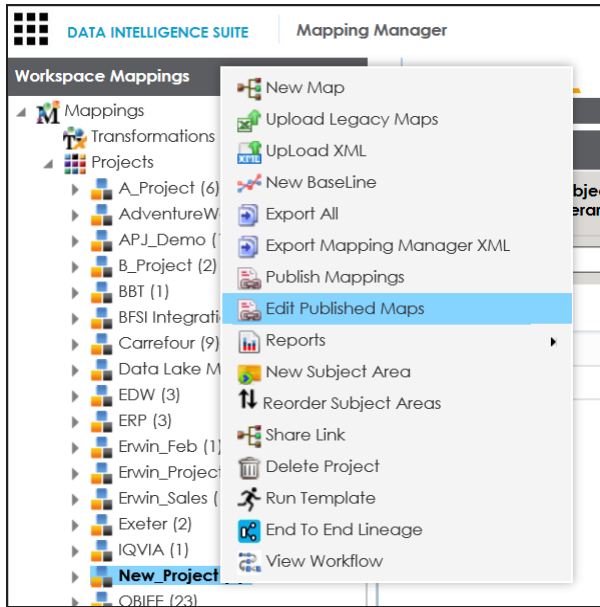


**Note:** In Mapping Specification, the target and source environment are updated to their corresponding production environment.

You can edit a published map before the effective date of publishing. It enables you to update the effective date of publishing and publishing notes.

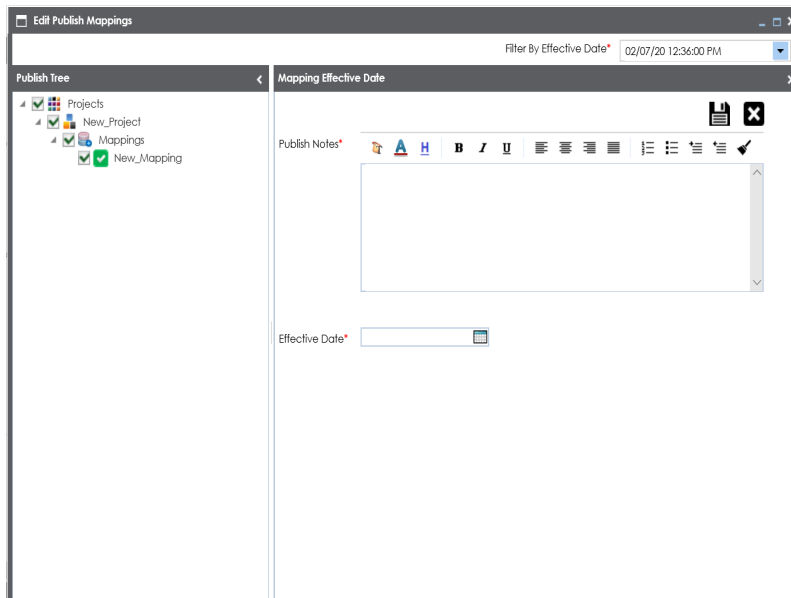
To edit published maps, follow these steps:

1. Under the **Workspace Mappings** pane, right-click a project containing the published map.



2. Click **Edit Published Maps**.

The Edit Publish Mappings page appears. You can filter the mappings using **Filter by Effective Date** option.



3. Under the **Publish Tree** pane, select the published map.
4. Update the Publish Notes and Effective Date.

5. Click .

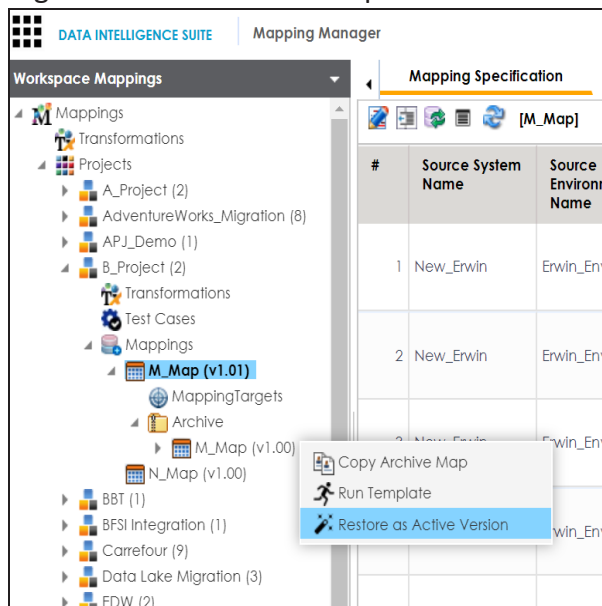
The published map is updated.

## Restoring Archived Maps As Active

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

To restore archived maps as active, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project node.
3. Expand the **Mappings** node under the project.
4. Expand the **Archive** folder.
5. Right-click the archived map to be restored.



The Restoring Archived Mapping as Active page appears.

Restoring Archived Mapping as Active

Mapping Name\* M\_Map


Mapping Version 1.02

Mapping Description

Version Label

Changed Description\*

Mail Comments

6. Enter Mapping Description, Version Label, Changed Description and relevant Mail Comments.
7. Click .

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

DATA INTELLIGENCE SUITE Mapping Manager

Workspace Mappings

Mapping Specification

#	Source System Name	Source Environment Name
1	New_Erwin	Erwin_Environment
2	New_Erwin	Erwin_Environment
3	New_Erwin	Erwin_Environment

## Exporting Mapping Specifications

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

Exporting mapping specifications involves:

- [Exporting mapping specifications into proprietary XML format](#)
- [Exporting mapping specifications ETL tools](#)

## Exporting Mapping Specifications into Proprietary XML Format

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

1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Under the **Workspace Mappings** pane, expand the desired project.
3. Click the mapping to be exported.

The following page appears showing the Mapping Specification grid.

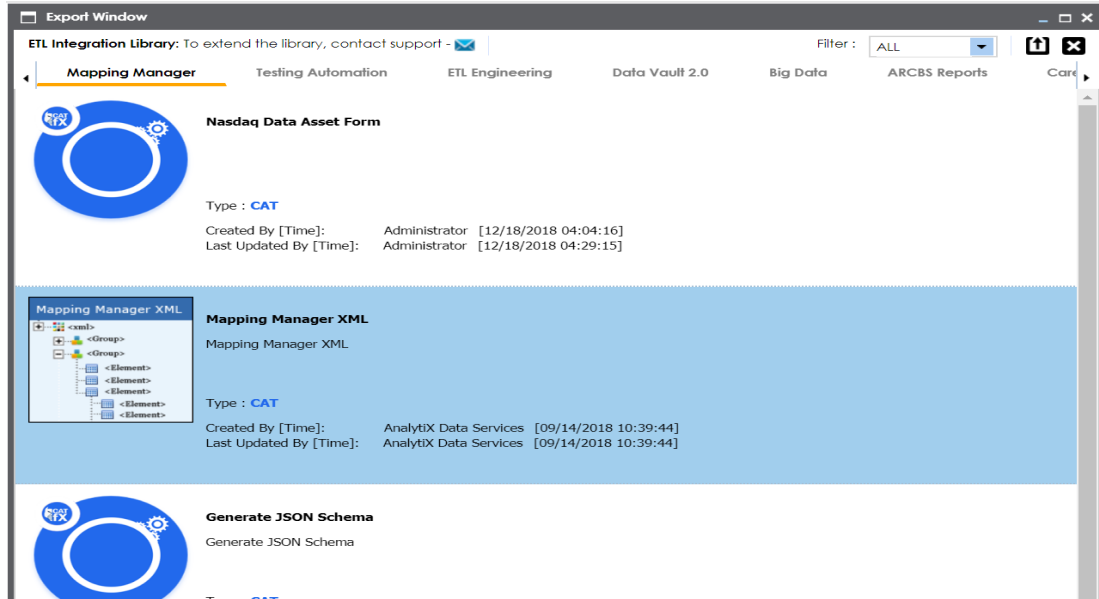
The screenshot displays the Mapping Manager application window. The main area shows a grid of mapping specifications for a project named 'Erwin\_Map'. The grid has columns for Source System Name, Source Environment Name, Source Table Name, Source Column Name, Source Column Data Type, Source Column Length, Business Rule, and Extended Business Transformation. The grid contains 6 rows of data.

#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	Extended Business Transformation
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8	ABS	
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS	
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	bigint	8	ABS	
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS	
5	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT	bigint	8	ABS	
6	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	RELATIONSHIP	varchar	250	ABS	

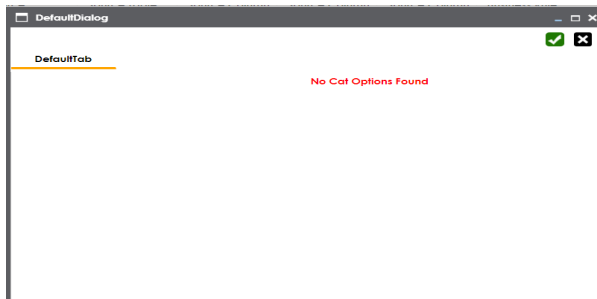
The interface also includes a left sidebar with a tree view of the workspace mappings, a top bar with tabs for Mapping Specification, Graphical Designer, Test Specification, and Workflow Log, and a right sidebar with a Metadata Catalogue and Metadata Properties pane.

4. Click .

The Export Window appears.



5. Select **Mapping Manager XML** and click .

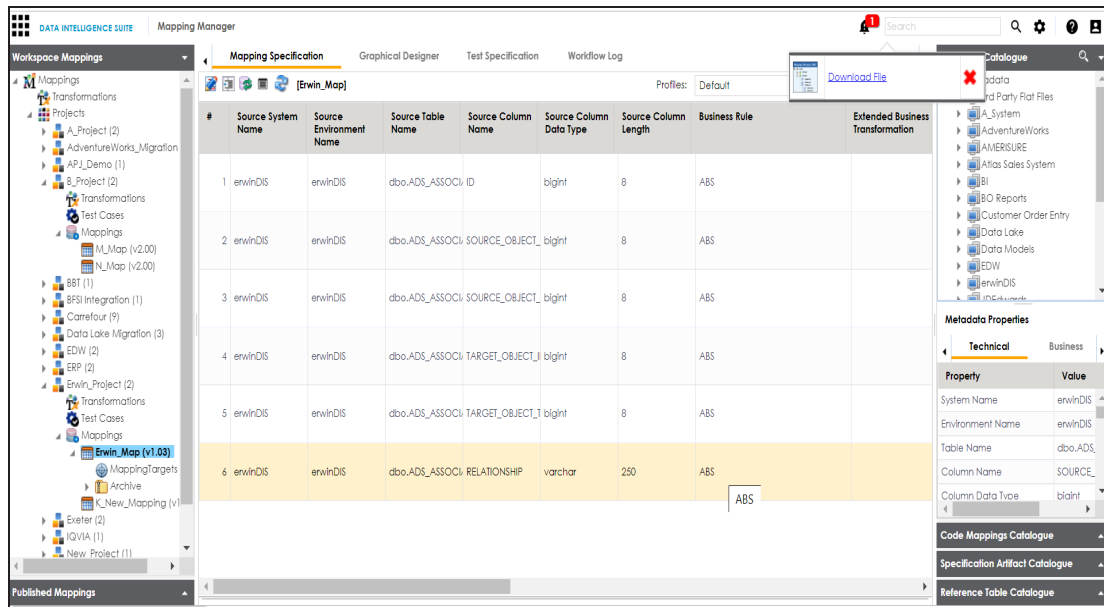


6. Click .

7. Select the mappings to be exported.

8. Click .

The following page appears.



9. Click the Download file hyperlink.

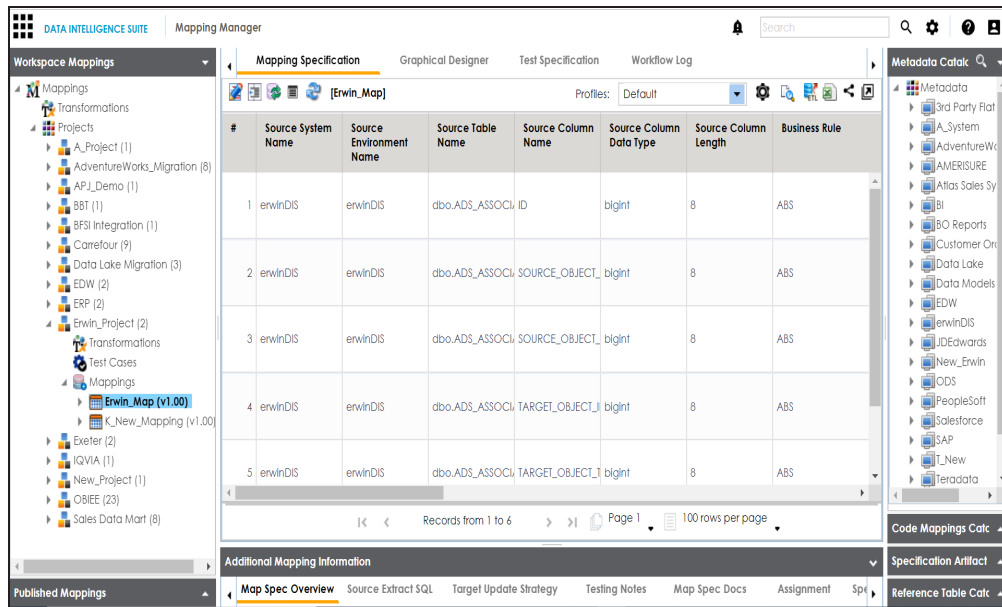
A zipped file is downloaded containing the mapping specification in XML format.

## Exporting Mapping Specifications to ETL Tools

Once the mappings are considered 'approved for coding', you can export the mappings as coding requirements or exported to XML to automatically generate ETL/ELT jobs for industry leading ETL tools like Informatica PowerCenter, IBM DataStage, Microsoft SQL Server SSIS, and Talend.

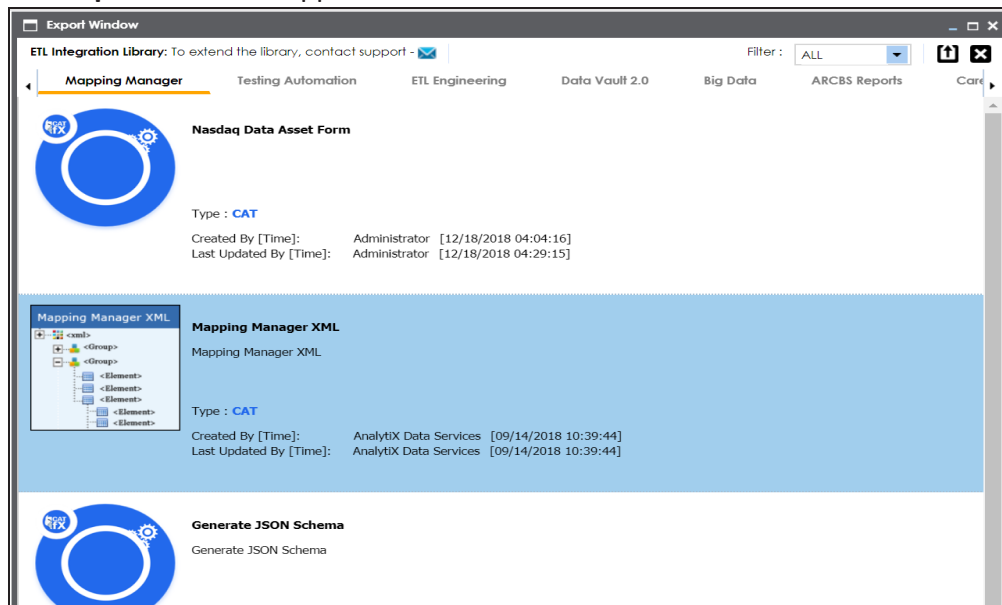
1. Go to **Application Menu > Data Catalog > Mapping Manager > Workspace Mappings**.
2. Expand the desired project node and click the desired mapping.

The **Mapping Specification** tab appears on the center pane.



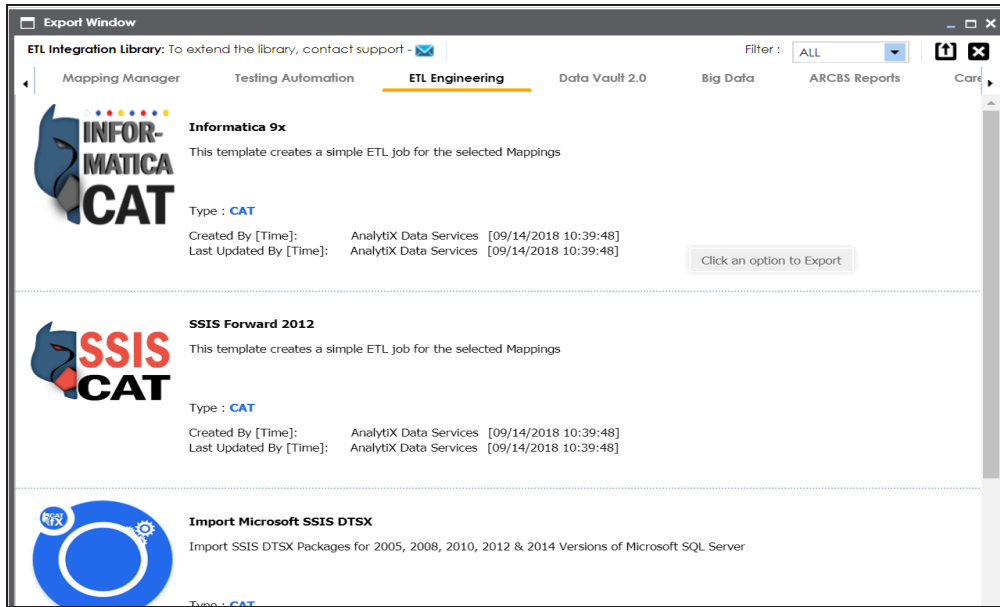
3. Click .

The **Export Window** appears.



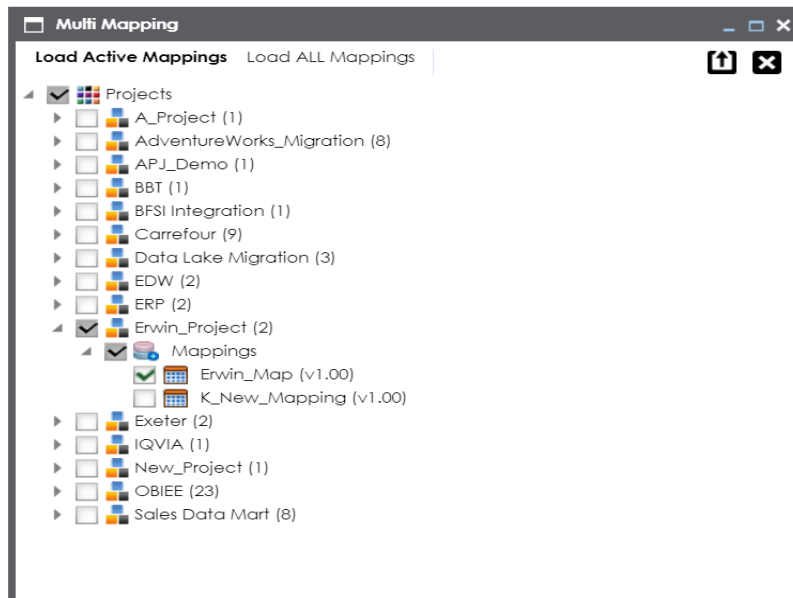
4. Click **ETL Engineering** tab.





5. Select the desired ETL tool and click .

Multi Mapping page appears.



6. Select the mapping to be exported from the tree and click .

7. Download the XML / DTSX file by clicking the **Download File** hyperlink.

DATA INTELLIGENCE SUITE Mapping Manager

Task Done

Mapping Specification Graphical Designer Test Specification Workflow Log

[Erwin\_Map]

Profiles CAT Download File

#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Target Column Name	Target Column Data Type	Target Column Length	Transformation
1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	ID	bigint	8				
2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_I	bigint	8				
3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_I	bigint	8				
4	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT_I	bigint	8				
5	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	TARGET_OBJECT_I	bigint	8				

Records from 1 to 6 Page 1 100 rows per page

Additional Mapping Information

Map Spec Overview Source Extract SQL Target Update Strategy Testing Notes Map Spec Docs Assignment Specification Artifacts Level of E

Published Mappings

Code Map Specific Reference

The mapping specification is exported.