

# erwin Data Intelligence Suite

# **Reference Data Management Guide**

Release v11.0

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## **Managing Reference Data**

This section walks you through reference data and codeset management.

Reference data management is done via Reference Data Manager. It involves creating database like structures to maintain all your reference data. You can add reference data in a reference table from a spreadsheet, manually or via a DB scan. To validate reference tables for data quality tests, you can use SQL queries. You can also version, publish (to environments like production, development, test etc.), and link the reference tables to relevant mappings.

For further information on accessing and using the Reference Data Manager, refer to the Using Reference Data Manager topic.

- Codeset management is done via Codeset Manager. It involves creating, managing, and mapping codesets in the Codeset Manager. It has two sections:
  - Enterprise Codesets: Under the Enterprise Codesets section, you can create and manage codesets. It involves importing legacy codesets, categorizing codesets, defining code values, versioning codesets, and publishing codesets to various environments.
  - Codeset Mappings: Under the Codeset Mappings section, you can create and manage code crosswalks (mappings). It involves categorizing code mappings, defining code crosswalks, versioning code crosswalks, and publishing code crosswalks to various environments.

For further information on accessing and using the Codeset Manager, refer to the Using Codeset Manager topic.

## **Using Reference Data Manager**

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

1	alidatio	n Rule Grid								2
	• 🖪	1								2
rs	•	Validation Name	Validation Description	Created By	Created Date	Modified By	Modified Date	Validation Rule	Edit	Delet
l	1	EMPLOYEE MANAGER CHECK	Rule to check for valid manager	Administrator	2018-10-19 09:05:10.51			Ť	1	×
	2	EMPLOYEE NAME RULE	checking for valid employee nam	Administrator	2018-10-19 09:05:40.04	Administrator	2019-03-13 22:43:50.60	ŤŻ	1	×
	3	Incorrect_Object_Id	desc	Administrator	2019-09-11 14:11:59.4	Administrator	2019-11-01 13:19:02.19	Ť	1	×
	4	INVALID EMP RULE		Administrator	2018-10-19 09:05:57.25			ŤŻ	1	×

UI Section	Function
1-Workspace	Use this pane to browse and work on validation rules, environments,
1-WORKSpace	reference folders, and reference tables.
2-Right Pane	Use this pane to work on the data based on your selection in the Work-
Z-RIGHT Palle	space pane.
3-Additional Table	Use this pane to view or work on additional information of a reference
Information	table selected in the Workspace pane.
4-Published Tables	Use this pane to browse, view, and export published reference tables.

Managing reference data involves the following:

- Creating reference folders
- Creating reference tables
- Creating publish environments
- Adding validation rules
- Associating codesets with reference tables
- Versioning reference tables

- Publishing reference tables
- Associating reference tables with mappings

## **Creating Reference Folders**

Reference folders group reference tables based on your data integration project. Therefore, before creating reference tables, you need to create a reference folder. You can also create sub-folders to group reference tables further.

To create reference folders, follow these steps:

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

DATA INTELLIGENCE SUITE Reference	Data Mo	anager
Workspace 👻	Refere	ence Tables
Reference Datasets     Audit History     Validation Rules     Environments	#	Table Name
Reference Folder:	1	TECHPUBS_TEAM

3. Click New Folder.

The New Folder page appears.

🔒 New Folder	_ 🗆 ×
Folder Name* :	
Folder Description :	

4. Enter the Folder Name and Folder Description.

For example:

- Folder Name: City Names
- **Folder Description**: This folder contains reference tables for city names.
- 5. Click

The folder is created and saved in the Reference Folders tree.

Once a reference folder is created, you can manage it using the options available on rightclicking the reference folder. <u>Managing reference folders</u> involves:

- Creating sub-folders
- Editing reference folders
- Assigning users
- Deleting reference folders

## **Managing Reference Folders**

Managing reference folders involves:

- Creating sub-folders
- Editing reference folders
- Assigning users
- Deleting reference folders

To manage reference folders, follow these steps:

1. In the Workspace pane, right-click a reference folder.



2. Use the following options:

#### **New Sub Folder**

Use this option to create sub-folders and group reference tables further.

#### **Edit Folder**

Use this option to update reference folder's name and description.

#### **Assign Users**

Use this option to assign users to a reference folder based on project, departments, functions, and so on. On the Assign Users page, select user IDs under User ID list-box and move them to Assigned Users list-box using the arrows ( or ). Similarly, to change existing user assignment, select user IDs under Assigned Users list-box and move them back to User ID list-box using the arrows ( or ).

#### Delete

Use this option to delete a reference folder that is no more required.

## **Creating Reference Tables**

Reference tables store reference data. You can create reference tables in new or existing reference folders. You can also create reference tables under the reference sub-folders.

To create reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. In the **Workspace** pane, right-click a reference folder or sub-folder.

For example, if you right-click a reference folder the following options appear.



3. Click **New Table**.

The New Reference Table page appears.

New Reference Table			_ 🗆 ×
		Save	Cancel
Folder Name :	Erwin		
Table Name* :			
Version :	1.00		
Owner* :			
Data Steward :	-Select Data Steward-		•
Description :			
Import Data from Spreads	neet		
			• ×
Column Name		Order	

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

Field Name	Description
	Specifies the name of the reference folder.
Folder Name	For example, NASDAQ Healthcare.
	It is autopopulated and cannot be edited.
Table Name	Specifies the name of the reference table.
	For example, Data_Classifications_Levels.
	Specifies the version of the reference table.
Version	For example, 1.00.
	It is autopopulated and cannot be edited.
Owner	Specifies the reference table owner's name.
Owner	For example, Talon Smith.

Field Name	Description
	Specifies the name of the data steward responsible for the reference table.
Data Sta	For example, Jane Doe.
Data Ste- ward	Users assigned with the Legacy Data Steward role appear as drop down options. You can assign this role to a user in the Resource Manager.
	To assign data steward, select a data steward from the drop down
	options.
	Specifies the description about the reference table.
Description	For example: This reference table serves as domain for the data clas- sification column.
Import Data	Use this check box to import reference data into the reference table
from Spread-	from the XLSX file. For more information, refer to the Importing Data
sheet	from Spreadsheets section below.
1.0	

5. Click

A reference table is created and saved in the Reference Tables tree.

### **Importing Data from Spreadsheets**

To import reference data from MS Excel files, follow these steps:

1. On the **New Reference Table** page, click the **Import Data from Spreadsheet** check box.

New Reference T	able	_ 🗆 🗙
	Nex	Cancel
Folder Name :	erwin Sales	
Table Name* :	HR_REF_TABLE	
Version :	1.00	
Owner* :	Sojha	
Data Steward :	John Doe	~
Description :	This is a reference table for HR Dept.	
Import Data from Spr	readsheet 🗹	
	Drag-n-Drop files here or click to select files for upload.	

- 2. Drag and drop or use 📤 to browse and select the XLSX file.
- 3. Click Next.

The Preview Screen page appears. To exclude a column from the import process, double-click the column header and click **NOT\_IN\_USE**.

Previ	Preview Screen									
Table N	Table Name: HR_REF_TABLE To exclude a column from the import process, double click on the column header and select 'NOT_IN_USE'						'NOT_IN_USE' 🚹 🗙			
S.NO	TABLE_NAME	TABLE_DEF	TABLE_COMMENTS	LOGICAL_TABLE_NAME	COLUMN_NAME	COL_DEF	COLUMN_COMMENTS	LOGICAL_COLUMN_NA		
1	dbo.RM_RESOURCE_New				RESOURCEID_New					
2	dbo.RM_RESOURCE_New RESOU				RESOURCENAME_New					
3	dbo.RM_RESOURCE_New RESOURCEDESC_New									
4	4 dbo.RM_RESOURCE_New RE					RESOURCECELLPHONE_Ne				
5	dbo.RM_RESOURCE_New				RESOURCEHOMEPHONE_N					
6	dbo.RM_RESOURCE_New				RESOURCEEMAIL_New					

### 4. Click **1**.

The reference data is imported into the reference table.

If you do not click the Import Data from Spreadsheet check box, you need to <u>add columns</u> to the reference table and then add column values:

- Manually
- From MS Excel files
- Through DB scans

You can manage a reference table using the options available on right-clicking the reference table. <u>Managing reference tables</u> involves:

- Altering reference tables
- Copying reference tables
- Assigning users to reference tables
- Deleting reference tables

## **Adding Columns to Reference Tables**

After creating a reference table, you can add columns to the reference table.

To add columns to reference tables, follow these steps:

1. In the **Workspace** pane, right-click a reference table.



2. Click Alter Table.

The Alter Table page appears.

🖉 Alter Table						_ 0
					Ľ	×
Folder Name :	Erwin					
Table Name* :	T_NAME					
Version :	1.00					
Owner* :	Samuel					
Data Steward :	janedoe					•
Description :	Reference	Table for dat	ta integration proje	ct.		
Created By :	Administra	itor		Created Date :	2019-12-23 17:13:09.15	
Modified By :				Modified Date :		
						<b>.</b>
						• ×
Column Name	Order	Created By	Created Date	Modified By	Modified Date	

3. Click 💽.

A new row is added to the grid.

4. Double-click the cell under the **Column Name** and enter the column name.

You can add multiple columns.

🖉 Alter Table						:
						3
Folder Name :	Erwin					
Table Name*:	T_NAME					
Version :	1.00					
Owner* :	Samuel					
Data Steward :	janedoe				•	,
	Reference	Table for da	ta integration proje	ect.		
Description :						
Created By :	Administra	itor		Created Date :	2019-12-23 17:13:09.15	
Modified By :				Modified Date :		
					E	×
Column Name	Order	Created By	Created Date	Modified By	Modified Date	
ID	1					
Nam						

## 5. Click

The columns are added to the reference table.

Workspace 👻	Reference Columns					^
E- 📁 Reference Datasets	2					
- 🙀 Validation Rules	ID	NAME	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE
E- 🗱 Reference Folders						
EDW						
Erwin						
ERWINDIS(1.00)						
T_NAME(1.00)	No Records Found					•
🗉 🚦 NASDAQ HEALTHCARE						

Once columns are added to a reference table, you can import column values:

- Manually
- From MS Excel files
- Through DB scans

## **Adding Column Values Manually**

You can add data to a reference table manually. It involves adding columns to the reference table and then adding column values. For more information on adding columns to reference tables, refer to the <u>Adding Columns to Reference Tables</u> topic.

To add column values manually, follow these steps:

1. In the **Workspace** pane, click a reference table.

Columns in the reference table appears.

Workspace 👻	Reference Columns						^
Reference Datasets     Organization	2 🖗						22
- 🙀 Validation Rules	ID	NAME	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE	
- n Environments							
Reference Folders							
🖻 🔒 EDW							
🕀 📕 EON							
🖻 📲 Erwin							
🗄 🚳 Reference Tables							
[]] ERWINDIS(1.00)	4						
T_NAME(1.00)							
🗄 📲 Erwin_Sales	No Records Found						
🖻 📲 NASDAQ HEALTHCARE							

- 2. Click 🜌.
- 3. Click 🚳

The Add Reference Data page appears.

Add Reference Dat	a	_
		<b>.</b>
ID	NAME	
		A

4. Double-click the cells under the columns and type the respective column values.

🖓 Add Reference Data		_ 🗆 ×
		60
ID	NAME	
12341		<b>A</b>
	Andrew	

5. Click 😡.

The column values are added to the reference table.

### **Importing Column Values from MS Excel Files**

You can import reference data from MS Excel files into reference tables. First, you need to add columns to a reference table and then import column values from an MS Excel file. For more information on adding columns to reference tables, refer to the <u>Adding Columns to</u> <u>Reference Tables</u> topic.

To import column values from MS Excel files, follow these steps:

1. In the **Workspace** pane, click a reference table.

Columns in the reference table appear.

Workspace 👻	Reference Columns					
Reference Datasets     Audit History	2 🖗					2
- 🙀 Validation Rules - 👔 Environments	ID	NAME	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE
E- 🚺 Reference Folders						
EDW B- BON						
E- 🚦 Erwin E- 🌍 Reference Tables						
ERWINDIS(1.00)	4					
T_NAME(1.00)	No Records Found					,
🗄 🚦 NASDAQ HEALTHCARE						

- 2. Click 🜌.
- 3. Click 💽.

The Import Table Data page appears.



4. Click Choose File and browse and select the XLSX file.

## 5. Click 1.

The Import Table Data page appears.

6. Double-click the Select Column to Import cell of the required column.

Column names added by you in the previous steps appear as options.

🛐 Import Table Data	🛐 Import Table Data 💶 🗆				
Delete And Reloo	ad				1 🛛
ID	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE	
ID	Clear Selection	Select Column To Import	Select Column To Import	Select Column To Import	<b>^</b>
813	ID NAME	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
813	Clear Selection	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
813		2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
813	Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
813	Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	
813	Administrator	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543	

7. Select the appropriate <Column\_Name>.

You can select multiple columns.

8. Click 1.

The column values are imported from the XLSX file.

### **Importing Column Values Through DB Scans**

You can import reference data from a database to a reference table by connecting the database to the application. It involves adding columns to reference table and then importing column values from the database. For more information on adding columns to reference tables, refer to the Adding Columns to Reference Tables topic.

To import column values from databases, follow these steps:

1. In the **Workspace** pane, click a reference table.

Columns in the reference table appear.

Workspace 🔹	Reference Columns						^
Reference Datasets     Audit History	2 🖗						8
- 🙀 Validation Rules - 👘 Environments 🗗 🏭 Reference Folders	ID	NAME	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE	
B DW C DN C F F EWIn C F F Fwin C F F F F F F F F F F F F F F F F F F F	4						Þ
<ul> <li>Erwin_Sales</li> <li>AsDAQ HEALTHCARE</li> </ul>	No Records Found						

- 2. Click 🌌.
- 3. Click 📦.

The DB Scan page appears.				
🐺 DB Scan				>
Delete And Reload				<b>K</b> Q
Query Panel	< ବ	uick Connection		>
	* V	Nandatory Fields		TEST ^
		DBType: *	Select DB Type	•
		Driver Name:		
		IP Address/Host Name:*		
		Port:*		
		Database Name:*		
		User Name:*		
		Password:*		•
Preview			, 	~
Note*: Only top 50 rows will be displayed in grid.				

4. Enter appropriate values in the fields on the **Quick Connection** tab to establish a connection with a database. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description			
	Specifies the database type.			
DB Туре	For example, Sql Server.			
Driver Name	Specifies the JDBC driver name for connecting to the database.			

Field Name	Description
	For example, com.microsoft.sqlserver.jdbc.SQLServerDriver
	The field is autopopulated based on the DB Type.
IP Address/Host	Specifies the IP address or server host name of the database.
Name	For example, localhost.
	Specifies the port to connect with the database.
Port	For example: 1433 is the default port for a Sql Server database
	type.
	Specifies the database name being used to connect to the ref-
Database Name	erence table.
	For example, ErwinDIS931.
User Name	Specifies the user name to connect with the database.
User Marine	For example, sa.
Password	Specifies the password to connect with the database.
rasswuru	For example, goerwin@1.

5. Click 🕅 to test the connection.

If the connection is established, the success message appears.

- 6. Write a query in the **Query Panel** to pull the data from the database.
- 7. Click 📓 to validate the query.
- 8. Click  $\boxed{\square}$  to preview the data.

The data is previewed.

	elete And Reload							St D	[Ť
Query					Quick			SQL 🖳	
	t * from <u>dbo.Project</u>					datory Fields		<b>父</b> TEST	
Selec	I NOIN <u>QDC.FIOIECI</u>				(	DBType: *	Sql Server	-	
					[	Driver Name:	com.microsoft	.sqlserver.jdbc.SC	
						P Address/Host Name:*	localhost		
						°ort:*	1433		
						Database Name:*	ErwinDIS931		
					II '	Sarabaso ritarrio.			
						lear Namo.*	sa		
						Jser Name:*	sa		
						Jser Name:* Password:*	sa		
Preview	w								
-	v PROJ_ID	PROJ_NAME	PROJ_DESCR	PROJ_COST_CENTER			•••••	PROJ_BUS_SPON	NSC
-		PROJ_NAME Select column to import	PROJ_DESCR Select column to import	PROJ_COST_CENTER Select column to import	F	°assword:*	•••••	PROJ_BUS_SPON Select column to	NSO
-	PROJ_ID				F	Password:*	•••••		NS
SNo	PROJ_ID	Select column to import			F	Password:*	•••••		NS
SNo 2	PROJ_ID Select column to import	Select column to import			F	Password:*	•••••		NS
Preview SNo 1 2 3 4	PROJ_ID Select column to import 1 2	Select column to import ERP EDW			F	Password:*	•••••		NS

9. Double-click the Select Column to Import cell under the required column.

A drop-down option appears displaying the reference columns.

Preview						~
SNo	PROJ_ID	PROJ_NAME	PROJ_DESCR	PROJ_COST_CENTER	PROJ_IT_SPONSOR_FULL_NAME	PROJ_BUS_SPONSOR
	ID	Select column to import	Select column to import	Select column to import	Select column to import	Select column to ir
1	1	ID NAME				
2	2	Clear selection Select column to import				
3	3	Select colorin to import				
4	4	BFSI Integration				
5	4	Data Lako Maratian				

10. Choose an appropriate <Reference\_Column\_Name> from the drop-down.

You can import multiple columns from the database.

11. Click 🛍.

The column values from the database are imported into the selected reference columns.

### **Managing Reference Tables**

Managing reference tables involves:

- Altering
- Copying

- Assigning users
- Deleting

To manage reference tables, follow these steps:

1. In the **Workspace** pane, right-click a reference table.

Workspace 🗸	Reference Columns	
Feference Datasets     Generation     Generation	🚳 🚳 🖪 📾	
🏫 Validation Rules 👔 Environments E 🏭 Reference Folders	ID	
EON	813	Administrator
È- ♣ Erwin È- ℬ Reference Tables 	813	Administrator
■ T_NAME(1.0) ■ T_NAME(1.0) Alter Tab		n 1 to 59 of 59
🖶 📲 NASDAQ HEALTHC 🛅 New Ver	rsion nformation	
🖻 🛔 New_Folder 🛛 👔 Copy	Properties	User Defined Fields
Associat	re Validations T_N	NAME
	e Codeset	00
S Assign U	w : jar	nedoe iference Table for data integration project.

2. Use the following options:

#### Alter Table

Use this option to update a reference table. You can edit table name, owner, data steward, and add or remove columns.

#### Сору

Use this option to copy a reference table. You can paste the copied reference table in a reference folder. To paste the reference table, right-click the reference folder and click **Paste**.

#### **Assign Users**

Use this option to assign users to reference tables. Before, you assign a user to a reference table, ensure that the user is assigned to the corresponding reference folder.

On the Assign Users page, select user IDs under **User ID** list-box and move them to **Assigned Users** list-box using the arrows ( $\Rightarrow$  or  $\Rightarrow$ ). Similarly, to change

#### Delete

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

### **Creating Publish Environments**

You can publish reference tables to various environments like development, production, test etc. You can also specify the schema of the environment, for example, DBO.

To create publish environments, follow these steps:

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



3. Click New Environment.

The New Environment page appears.

_ 🗆 🗙
<b>∐</b>

4. Enter the Environment Name and Schema Name.

For example:

- **Environment Name**: Production
- Schema Name: DBO
- 5. Click

The publish environment is created and saved on the Publish Environments page.

### **Adding Validation Rules**

You can define a validation rule in the form of SQL queries and use it to validate reference tables.

To add validation rules, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. In the Workspace pane, click the Validation Rules node.

The Validation Rule Grid page appears.

Workspace	▼ Valida	tion Rule Grid								
□- Datasets □- Audit History	÷									
Validation Rules	#	Validation Name	Validation Description	Created By	Created Date	Modified By	Modified Date	Validation Rule	Edi	Dele
🗄 📲 Reference Folders										
	1	EMPLOYEE MANAGER CHECK	Rule to check for valid manag	Administrator	2018-10-19 09:05:10			ŤŻ	1	×
	2	EMPLOYEE NAME RULE	checking for valid employee	r Administrator	2018-10-19 09:05:40	. Administrator	2019-03-13 22:43:50	ŤŻ	1	×
	3	Incorrect_Object_Id	desc	Administrator	2019-09-11 14:11:59			ŤŻ	1	×
	4	INVALID EMP RULE		Administrator	2018-10-19 09:05:57			Ť	1	×

3. Click 💽.

The New Validation Rule page appears.

New Validation Rule		_ 🗆 ×
	Ľ ×	
Validation Name * :		
Validation Description :		
Validation Rule * :		
Note* : Validation query sha	ould be in the following format for successful execution	
Select ROW_NUM, 'VALIDAT Or	ION ERROR MESSAGE' from	
	ION ERROR MESSAGE' ERROR_MSG from	
ROW_NUM should always b second column (with or wit	e the first column and the validation error message should be the hout the column alias).	

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
Validation Name	Specifies the name of the validation rule.
Validation Name	For example, Incorrect_Object_ID.
Validation Deserin	Specifies the description about the validation rule.
Validation Descrip- tion	For example: This validation rule validates the ERWIN_SALES ref-
tion	erence table.
Validation Rule	Specifies the SQL query of the validation rule.
	For example: select * from ERWIN_SALES where ID = 1000000.

## 5. Click 💾.

The validation rule is created and saved in the Validation Rule Grid.

Validat	/alidation Rule Grid									
Ð										
#	Validation Name	Validation Description	Created By	Created Date	Modified By	Modified Date	Validation Rule	Edit	Delet	
1	EMPLOYEE MANAGER CHECK	Rule to check for valid manager	Administrator	2018-10-19 09:05:10.51			ŤŻ	/	×	
2	EMPLOYEE NAME RULE	checking for valid employee nam	Administrator	2018-10-19 09:05:40.04	Administrator	2019-03-13 22:43:50.60	Ť	1	×	
3	Incorrect_Object_Id	desc	Administrator	2019-09-11 14:11:59.4			Ť	1	×	
4	INVALID EMP RULE		Administrator	2018-10-19 09:05:57.25			Ť	/	x	

Use the following options to work on the Validation Rule Grid page:

### Validation Rule (11)

Use this option to view validation rule queries.

Edit (🖍)

Use this option to update validation rules.

### Delete (X)

Use this option to delete validation rules that are no longer required.

Once a validation rule is added, you can:

- 1. Associate it with a reference table
- 2. Run validation against the reference table

### **Associating Validation Rules with Reference Tables**

After creating a validation rule, you need to associate the validation rule with a reference table.

This allows you to execute the validation rule to validate data in the reference table.

To associate validation rules with reference tables, follow these steps:

1. In the **Workspace** pane, right-click a reference table.

The available options appear.

Workspace 👻	Reference Columns
Reference Datasets     Audit History	🔊 🚳 🖪 📴
Validation Rules Environments Environments EDW EDW EON ENVironments EDW	ID 813 813
Reference Tables ERWINDIS(1.00)	- Records fr
Sub_Folder     Sub_Folder     Sub_Folder     Sub_Folder     New Version     New_Folder     New_Folder     Sub_Folder     Sub_Folder	le Informatio
Associate V Associate C Assign Users	odeset
😵 Delete	Description :

2. Click Associate Validations.

The Associate Validation page appears.

📸 A:	ssociate Validations				_ = ×
Availe	able Validations	<	Assoc	ciated Validations	>
#	Validation Rule Name	Validation Rule Description	#	Validation Rule Name	Validation Rule Description
#					
1	EMPLOYEE MANAGER CHECK	Rule to check for valid manc			
2	EMPLOYEE NAME RULE	checking for valid employee			
1 2 3 4	INVALID EMP RULE				
4	Incorrect_Object_Id	desc			

3. Drag and drop the required validation rule from the **Available Validation** pane to the **Associated Validation** pane.

For more information on adding validation rules, refer to the Adding Validation Rules topic.

Reference Columns					
💰 🍕 🖪 📦				nd 💀 🛪	
ID	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE	
13	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143	
13	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143	
13	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143	
13	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143	
Reco	rds from 1 to 59 of 59	0010 31 03 13 (0 51 3 (0		0010 11 01 11 10 11 10	
dditional Table Infor					
Table Prop	erfies User Defined Fields	Associated Validations	Associated Codesets	Assigned Users	
# V	alidation Rule Name		Validation Rule Desc	ription	
1	correct_Object_Id		desc		

4. Click

The acceptized validation rules appear on the Acceptized Validations tak

## **Running Validations Against Reference Tables**

You can run a validation rule query against a reference table after associating the table with the validation rule. Executing validation rule validates the data in the reference table.

To run validation rules against reference tables, follow these steps:

1. In the **Workspaces** pane, click a reference table.

The following page appears. Ensure that you are not in edit mode. If you are in edit mode, click 🔯 to cancel edit.

'orkspace ·	- Reference	Columns				
- Ceference Datasets	2 🦻					
🙀 Validation Rules 👣 Environments	ID		CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE
E- EDW						
🗄 📲 EON 🕀 📲 Erwin	813		Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
🖻 📲 Erwin_Sales	813		Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
Reference Tables	813		Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
NASDAQ HEALTHCARE	813	Records from 1 to	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
	Additional	able Information				
	•	Table Properties	User Defined Fields	Associated Validations	Associated Codesets	Assigned Users
	#	Validation Rule	Name		Validation Rule Description	
	1	Incorrect_Object	st_ld		desc	_

2. Click 🌌.

The Validate Table page appears.

🔯 Validate Tal	ble	_ 🗆 ×
Select Environr	ment:* DEV	Ľì ⊠
Select	Validation Name	
	Incorrect_Object_Id	

3. Select an environment and a validation rule.

For more information on creating environments, refer to the <u>Creating Publish Envir</u>-<u>onments</u> topic.

4. Click

Validation is successfully executed.

The error rows returned by executing the validations are highlighted in red color.

DATA INTELLIGENCE SUITE Referen	ce Data Manager				९ 🌣 🛛 🖻
orkspace	Reference Columns				
Reference Datasets Audit History	2 🚱				
Adult halony     Adult halony     Adult halony     Priviconments     Environments     Environments     Environments     Econ     Econ	ID	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE
	813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43
	813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43
	813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43
🗉 🚦 NASDAQ HEALTHCARE	813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
New_Folder Reference Tables	813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
	813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
	9	Aciministrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
	9	9 Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
	9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
	9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:4
	Records from 1	to 59 of 59			
	Additional Table Information				
olished Tables	Table Properties	User Defined Fields	Associated Validations	Associated Codesets	Assigned Users

## **Associating Codesets With Reference Tables**

You can associate codesets with columns of a reference table. Codesets can be used as configurable pick lists so that data can be selected from the drop-down.

To associate codesets with columns of reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. In the **Workspace** pane, right-click a reference table.

The available options appear.

Workspace 👻	Reference Columns
Reference Datasets	🚳 🚳 💽 📾
🕒 Audit History	
	ID
- Invironments	
🖃 🚺 Reference Folders	
主 - 📕 EDW	
EON	1
📮 📕 Erwin	2
🚊 🦪 Reference Tables	
ERWINDIS(1.00)	•
	- Reco
🕀 📻 Sub_Folder 🕜 Alter Table	
🕀 📲 Erwin_Sales 🛛 🎽 New Version	ble Inforr
🖶 🔒 NASDAQ HEAL 🎼 Copy	ıble Prop
🖻 📲 New_Folder 🛛 📸 Publish	
🙀 Associate Val	idations
- E Associate Co	deset
S Assign Users	
🐼 Delete	J View :
	Description.

### 3. Click Associate Codesets.

The Associate Codeset page appears.

Associate Codeset				
			×	
Col	umn Name	Associated Codeset		
ID		N/A		
NAM	E	N/A		

4. Double-click the cell for the required column and select an appropriate codeset.
For more information on codesets, refer to the <u>Maintaining Enterprise Codesets</u> section.

	- 0	×
		J
Column Name	Associated Codeset	
ID	N/A	٦
NAME		
	EDW.Marital Status EDW.Country Codes ervin DIS.Project_System ICD 10.Certain zoonotic bacterial diseases ICD 10.Malignant neoplasm of ovary ICD 10.Tuberculosis	•

# 5. Click 💾.

The codeset is associated with the column of the reference table.

The corresponding column in the reference table is now configured as a drop-down and populated with values from the selected codeset.

Reference Columns					^
💰 🍕 🖪 📦				<b>1</b>	× 🖻 🖻
ID	NAME	CREATED BY	CREATED DATE	MODIFIED BY	M
	ERP	Administrator	2019-12-24 15:12:28.273	Administrator	: <b>*</b>
	EDW	Administrator	2019-12-24 15:12:28.273	Administrator	1
	Sales Data Mar	Administrator	2019-12-24 15:12:28.273	Administrator	1
	Admin(1) Joe Villers(4)	Administrator	2019-12-24 15:12:28.273	Administrator	4
	Kartik Sridhar(2) Resource_Name(3)	Administrator	2019-12-24 15:12:28.273	Administrator	4
t I	Clear Value Sales Data Mart	∆dministrator	2010-12-24 15-12-28 273	Administrator	, <del>,</del>
1 Reco	ords from 1 to 19 of 19				

## **Versioning Reference Tables**

You can create versions of reference tables and track the legacy of reference tables. The old version is archived and new version is added to the Reference Table tree in the Workspace pane.

To create versions of the reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. In the **Workspace** pane, right-click a reference table.

space	-	Reference (	Columns
Reference Datasets Qualit History		<u>í</u>	🖪 📭
Validation Rules		ID	
Environments			
Reference Folders			
🖭 👖 EDW		1	
EON		1	
Erwin		2	
ERWINDIS(1.0		3	
	,		
🛨 🌄 Sub_Folder 🙆 A	Alter Table		
🕀 📲 Erwin_Sales 🛛 🎽 🕨	New Version		
🗄 📕 NASDAQ HEAI 🃭 (	Сору		
🗄 🔒 New_Folder 📓 F	Publish		
1	Associate Va	idations	— Reco
	Associate Co		_
	Assign Users		ıble Info
	Delete		able Pro

3. Click New Version.

The New Version page appears.

i New Version	>
Table Name*	T_NAME
Version	1.01
Description	Reference Table for data integration project.
Version Label Changed Description*	

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
Table Name	Specifies the name of the reference table.
	For example, Data_Classifications_Levels.
Version	Specifies the new version of the reference table.
Version	For example, 1.02.
	Specifies the description about the reference table.
Description	For example: This reference table serves as domain for the data clas-
	sification column.
Version Label	Specifies the version label of the reference table.
	For example, Beta.
Changed	Specifies the description of the changes made in the reference table.
Description	For example: A new column, Object_ID was added in the reference
	table.

# 5. Click 💾.

The new version of the reference table is created and saved under the Reference Table tree.

The previous version of the reference table is archived.



## **Publishing Reference Tables**

You can publish a reference table to a publish environment. Before publishing a reference table, you must ensure that the table has passed all validations successfully.

To publish reference tables, follow these steps:

- 1. Go to Application Menu > Data Catalog > Reference Data Manager.
- 2. In the **Workspace** pane, right-click a reference table.

Workspace 👻	Reference Columns
Reference Datasets     Audit History	2 🦻
Validation Rules Environments Reference Folders EDW EON	ID
Erwin Erwin Reference Tables ERWINDIS(1.00)	2 3
I_NAME     Alter Table     Sub_Folder     Alter Table     Sub_Folder     New Version     NASDAQ HEAL     Copy     New_Folder     New Publish	
Associate Va Associate Co Assign Users Oplete	
	Table Name :

3. Click Publish.

A warning message appears.

4. Click Yes.

The Publish Table page appears.

🚴 Publish Table		- 🗆 ×
* Publishing the table will create a new version.		×
Table Name	T_NAME	
Version	1.01	
Version Label		
Change Description*		
Publish Environment*	DEV Production	
		<b>•</b>

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
	Specifies the name of the reference table.
Table Name	For example, Data_Classifications_Levels.
	It is autopopulated and cannot be edited.
	Specifies the current version of the reference table.
Version	For example, 1.00.
	It is autopopulated and cannot be edited.
Version Label	Specifies the version label of the reference table.
	For example, Beta.
	Specifies the description about the changes made in the reference
Change	table.
Description	For example: A new column, Object_ID was added in the reference
	table.
	Specifies the environment to which the reference table would be pub-
Publish Envir-	lished.
onment	For example, Production.
onnen	For more information on creating publish environment, refer to the
	Creating Publish Environments topic.

# 6. Click

The reference table is published. The published version is archived and a new version of the reference table is created in the Workspace pane.



The published version is also saved in the Published Tables pane.



## **Associating Reference Tables with Mappings**

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

To associate reference tables with Mappings, follow these steps:

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

The Mapping Specification grid appears.

Workspace Mappings 🛛 👻	۰_	Mapping Specifico	<b>tion</b> Graph	nical Designer	Test Specification	Workflow Lo	g	•
Mappings	<u>i</u>	APPEND 077	👌 [Integration	1]	Profiles:	Default	🔽 🏟 🔽	, 👯 🗟 🖬 🐻 😣 < 🗵
Projects  Frojects  Frojec	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>Erwin_Project (5)</li> <li>Erwin_Sales (1)</li> <li>Transformations</li> </ul>	1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEID	int	4	FLOOR
<ul> <li>Test Cases</li> <li>Mappings</li> <li>Integration</li> <li>MappingTargets</li> </ul>	2	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCENAME	varchar	100	REVERSE
<b>U</b>	3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	dbo.RM_Resource

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

٠	Mapping Specifica	<b>tion</b> Graph	nical Designe	r Test Specifico	ation Workf	low Log
		🛛 😂 [Integration	n]	Profil	es: Default	🔽 🗘 🗋
#	Source System Name	Source Environment Name	Source Tał Name	User Defined-45	mn Source Co	Length
1	Erwin_Sales	Integration	dbo.RM_RE	User Defined-47 User Defined-48 User Defined-49 User Defined-50		4
2	Erwin_Sales	Integration	dbo.RM_RE	Mapping Spec Rov	v Comments	100

5. Select the **Reference Table** check box.

The Reference Table column appears in the Mapping Specification grid.

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

كعا	You can	associate Graphical Desi			Columns /orkflow Log	with the refere	nce tables. Metadata Catalogue ् ,
💰 🖬 🛃 🖉	APPEND 077 👸	[Erwin_Map]	Profiles:	Default	- Ô	🐧 👯 🗟 🖬 🐻 🐼 < 🗵	Code Mappings Catalogue
`arget Column .ength	Created By	Created Date 2019-10-21 14:38	CSM Mapping 6:15.057	Last Modified By	Last Modified Date Time	Reference Table	<ul> <li>Code Mappings</li> <li>C_Name</li> <li>EDW</li> </ul>
	Administrator	2019-10-21 14:36:15.057	Integrated_Map(:	1.00) <sup>ninistrator</sup>	2019-12-10 14:49:07.187	^	<ul> <li>CD Crosswalks</li> <li>Integrated_Data</li> <li>Mappings</li> </ul>
	Administrator	2019-10-21 14:36:15.057		Administrator	2019-12-10 14:49:07.187		Map1(1.00)

7. Click 🐻.

The reference table is associated with the mappings.

## **Using Codeset Manager**

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

ets Workspace	Summ	ary							
Enterprise Codesets Environments		Category Name	Category Hierarchy	Codeset Name	# of Active Codes	Created By	Created Date	Modified By	Modified Dake
Codesets 3rd Party Flat Files	1	SAP	SAP	Material Number	2	Administrator	2018-09-14 11:04:4	Administrator	2018-09-14 11:04
🕀 📲 APJ Demo	2	EDW	EDW	Gender	3	Administrator	2018-10-05 10:47:1	Administrator	2018-10-05 10:47
EDW erwin DIS	3	EDW	EDW	Marital Status	5	Administrator	2018-10-15 10:27:3	Administrator	2018-10-15 10:27
- CD 10	4	EDW	EDW	Country Codes	5	Administrator	2019-07-16 11:32:5	Administrator	2019-07-16 11:32
🗄 📕 New_Cat	5	ICD 10	ICD 10	Certain zoonotic bacterial	18	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:42
New_Category AP	6	ICD 10	ICD 10	Malignant neoplasm of ove	4	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:42
	7	ICD 10	ICD 10	Tuberculosis	18	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:42
	8	ICD 10	ICD 10	Intestinal infectious disease	10	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:42
	9	ICD 10	ICD 10	Multiple myeloma	10	Administrator	2018-10-15 09:42:0	Administrator	2018-10-15 09:42
	10	ICD 9	ICD 9	Ovary	1	Administrator	2018-10-15 09:42:4	Administrator	2018-10-15 09:42
	- 11	ICD 9	ICD 9	Tuberculosis	9	Administrator	2018-10-15 09:42:4	Administrator	2018-10-15 09:42
	12	ICD 9	ICD 9	Intestinal infectious disease	9	Administrator	2018-10-15 09:42:4	Administrator	2018-10-15 09:42
	13	ICD 9	ICD 9	Multiple myeloma	10	Administrator	2018-10-15 09:42:4	Administrator	2018-10-15 09:42

<b>UI Section</b>	Function
	Use this pane to browse through Codesets Workspace and Code Mappings
1-Work-	Workspace panes.
space	Codesets Workspace enables you to create and categorize codesets. Code Map-
	pings Workspace enables you to create and categorize code mappings.
2-Right	Use this pane to work on the data based on your selection in the Workspace
Pane	pane.
3-Pub-	
lished	Use this pane to browse, view, and export published codesets.
Codesets	
4-Retired	Use this pane to browse, view, and export retired codesets.
Codesets	ose this palle to browse, view, and export retired todesets.

Managing codesets involves the following:

- Maintaining enterprise codesets
- Maintaining code mappings

# **Maintaining Enterprise Codesets**

You can create and maintain codesets using the Enterprise section of the Codeset Manager. Under the Enterprise section, you can create codesets, add code name and code value pairs, and version them. You can also publish the codesets to various environments such as development, test, or production and used it create code crosswalks (mappings).

Maintaining enterprise codeset involves:

- Creating categories
- Adding codesets
- Versioning codesets
- Deleting codes and codesets
- Publishing codesets

## **Creating Categories**

Codes are stored in a hierarchical manner Categories > Codesets. You can group codesets into categories based on your organization's projects, departments, or functions. Therefore, before creating codesets, you need to create a category. You can also create sub-categories to group codesets further.

To create categories, follow these steps:

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

DATA INTELLIGE	NCE SUITE Codeset M	anager	
Enterprise Codes	Codeset Mappings		
Codesets Workspac	e 🗸	Summo	ary
Enterprise Co	ents	#	Category Name
E Codesets	New Category	1	SAP
	Export All	2	EDW
		3	EDW
		4	EDW
		5	ICD 10
		6	ICD 10

3. Click New Category.

The New Category page appears.

🚪 New Category		- <b>- ×</b>
	li ×	
Category Name*		
Category Description		

4. Enter the Category Name and Category Description.

For example:

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

A category is created and saved in the category tree.

Once a category is created, you can:

- Assign users to the category
- Add codesets to the category

You can also manage it using the options available on the right-clicking category. <u>Managing</u> <u>categories</u> involves:

- Updating categories
- Creating sub categories
- Deleting categories
- Creating new codesets
- Exporting codesets
- Deleting codesets
- Exporting category codesets
- Importing codesets
- Assigning users

## **Managing Categories**

Managing categories involves:

- Updating categories
- Creating sub categories
- Deleting categories
- Creating new codesets
- Exporting codesets
- Deleting codesets
- Exporting category codesets
- Importing codesets
- Assigning users

To manage categories, follow these steps:

1. In the **Codesets Workspace** pane, right-click a category.

DATA INTELLIGENCE SUITE Codeset Mo	anager	
Enterprise Codesets Codeset Mappings		
Codesets Workspace 👻	Category Details	
Enterprise Codesets     Environments     Codesets		
TechPubs1	Category Name	Tec
E S Cod	Category Description	
P 🛄 Delete Category		
🛨 📰 Tr 🕂 New Codeset		
Export Codesets		
Delete Codeset(s)		
Export Category Ca	odesets Created By	Adr
Import Codesets		200
S Assign Users	Created Date Time	202

2. Use the following options:

#### New Sub Category

Use this option to create a sub-category and group codesets further.

#### **Delete Category**

Use this option to delete a category that is no longer required. Deleting a category also deletes codesets in it.

#### **New Codesets**

Use this option to create new codesets. For more information on creating new codesets, refer to the Adding Codesets topic.

#### **Export Codesets**

Use this option to export codesets to an XLSX file.

#### Delete Codeset(s)

Use this option to delete one or multiple codesets in a category. On the Delete Codesets page select a codeset(s) and delete them.

#### **Export Category Codesets**

Use this option to export the category codesets to an XLSX file.

#### **Import Codesets**

Use this option to import codesets from another category. On the Import Codesets page you can browse and upload files.

#### Assign Users

Use this option to assign users to a category based on your organization's projects, departments, functions, and so on. On the Assign/Unassign Users page, select or remove users and click . For more information on assigning users, refer to <u>Assigning Users</u> topic.

### **Assigning Users**

You can assign users to a category and enable write access to all sub-folders and codesets within the category.

To assign users, follow these steps:

1. In the **Codesets Workspace** pane, right-click a category.



2. Click Assign Users.

Jser ID			Ľ ×
Jser ID		Assigned Users	
ks123 mboggs mread new_user_id public		*	*
	-		~

- Use (➡ or ➡) to move users from User ID box to Assigned Users box and use (➡ or ➡) to move users from Assigned Users box to User ID box.
- 4. Click 💾.

The users are assigned to the category.

Follow the same procedure to add/remove users to/from the category.

# **Adding Codesets**

After creating a category, you can add codesets to enter codes.

Codesets store codes in a code value grid.

To add new codesets, follow these steps:

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

DATA INTELLIGENCE SUITE Codeset Manager					
Enterprise	Codesets	Codeset Mappings			
odesets Wo	rkspace	-	Category Details		
En En	New_Cat	lat Files			

3. Click New Codeset.

The New Codeset page appears.

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

4. Enter Codeset Name and Codeset Description.

For example:

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

A new codeset is created and saved under the Codesets tree.

Once a codeset is created you can add codes to the code value grid in the following ways:

- Entering codes manually
- Importing codesets from a MS Excel file
- Importing codesets through a DB scan

# **Entering Codes Manually**

After creating codesets, you can add codes manually in the code value grid.

To enter codes manually, follow these steps:

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

The Code Value Grid appears.

DATA INTELLIGENCE SUITE Codeset M	anager				
Enterprise Codesets Codeset Mappings					
Codesets Workspace 🗸 🗸	Category Details				
🖃 📕 Enterprise Codesets	Code Value Grid				
Environments	2				
Srd Party Flat Files     APJ Demo     D     EDW     erwin DIS	Code Name	Code Value	Code Description	Codeset Name	System Name/Environmer
Codesets Sales_Codeset(1.00) CD 10					
<ul> <li>ICD 9</li> <li>New_Cat</li> <li>New_Category</li> <li>SAP</li> </ul>					

- 3. Click 2.
- 4. Click 🚳.

The New Code page appears.

🖓 New Code			_ = ×
			Li ×
Code Name*		User Defined Field 3	
Code Value*			
Code Description		User Defined Field 4	
		User Defined Field 5	
System/Environment Name	Please select System/Environment	User Defined Field 6	
Start Date			
End Date		User Defined Field 7	
Activate User Defined Fields	ON	User Defined Field 8	
User Defined Field 1			
		User Defined Field 9	
User Defined Field 2			
		User Defined Field 10	
Note* : Date Format = <b>MM/DD</b> /	ΫΫΫΫ		

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

Field Name	Description		
Code Name	Specifies the code name.		
	For example, Admin.		
Code Value	Specifies the code value of the code name.		
	For example, 1.		
Code Descrip	Specifies the description about the code.		
tion For example: The code value for Admin is 1.			
System/	Specifies the system and environment related with the code.		
Environment	For example, EDW.EDW-DEV.		
Name	Select the System/Environment name.		
	Specifies the start date of the code validity.		
Start Date	For example, 02/24/2020.		
	Enter the start date using 🛄.		
End Date	Specifies the end date of the code validity.		
	For example, 03/22/2021.		

Field Name	Description
	Enter the end date using 🔜.
IUser Defined	Turn <b>Activate User Defined Fields</b> to <b>ON</b> to use the user defined fields in the Code Value Grid.
li içer Detinen	You can use your own UI labels for user defined fields. For more inform- ation on using UI labels for user defined fields, refer to the <u>Configuring</u> <u>Language Settings</u> topic.

# 6. Click

The codes are entered into the Code Value Grid.

DATA INTELLIGENCE SUITE Codeset M	anager							h
Enterprise Codesets Codeset Mappings								
Codesets Workspace 🗸	Category Details							
🖃 📕 Enterprise Codesets	Code Value Grid							
Environments     Codesets	2						F	Profiles : Profile_ABC
🖻 🔒 3rd Party Flat Files 🗄 🔒 APJ Demo	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Extended Properties
Data_Integration     EDW								
erwin DIS	Admin	1		Sales_Codeset	Project_System	$\checkmark$		View
Project_System(1.00)     Sales_Codeset(1.00)	Joe Villers	4		Sales_Codeset	Project_System	$\checkmark$		View
E ICD 10	Kartik Sridhar	2		Sales_Codeset	Project_System	$\checkmark$		View
ICD 9	Resource_Name	3		Sales_Codeset	Project_System	$\checkmark$		<u>View</u>
B								

7. Use the following options:

### Maximize

To maximise the Code Value Grid view, click

### Export to Excel

To download the codeset, click 🗐.

Managing codesets involves:

- **Editing Codesets**
- **Copying Codesets**
- Editing Code Value Grid
- Retiring Codesets

## **Importing Codes using MS Excel Files**

You can import codes into Code Value Grid using .xlsx files. The .xlsx file template must be compatible with the Code Value Grid. To ensure the compatibility, download the template and enter the codes and upload it to the Code Value Grid.

To import codes using MS Excel Files, follow these steps:

1. In the **Codesets Workspace** pane, click a codeset.

The Code Value Grid appears.

2. Click it to download the template file.

The template in .xlsx format is downloaded.

3. Enter relevant data in the template.



Set the ACTIVE\_FLAG column values to Y, and set the DELETE\_FLAG column values to N.

You can use your own UI labels for user defined fields. For more information on using UI labels for user defined fields, refer to the Configuring Language Settings topic.

DATA INTELLIGENCE SUITE Codeset M	anager				
Enterprise Codesets Codeset Mappings					
Codesets Workspace 🗸 🗸	Category Details				
Enterprise Codesets	Code Value Grid				
Environments	2				
Gradient Party Flat Files     APJ Demo     Dradient EDW     Dradient EDW	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment
Codesets     Codesets     Codesets     ICD 10     ICD 9     New_Cat     New_Cat     SAP					

- 4. Click **2** to enable the edit mode.
- 5. Click 💽.

The Import Excel page appears.

🛐 Import Excel	_ 🗆 ×
Attach Choose File No file chosen	
۲)	

- 6. Browse the updated .xlsx file using **Choose File**.
- 7. Click 🛍.

The codes are uploaded into the Code Value Grid.

Once you upload the codes in the Code Value Grid, you can manage the codesets.

Managing codesets involves:

- Editing Codesets
- Copying Codesets
- Editing Code Value Grid
- Retiring Codesets

## Importing Codes into Code Value Grid using DB Scan

You can import codes into Code Value Grid by scanning a database. Enter connection parameters and establish a connection between the database and erwin DI Suite. Once the connection is established, write an SQL query to preview the required data. You can select the required columns and import them as codes into the Code Value Grid.

To import codes using DB scan, follow these steps:

1. In the Codesets Workspace pane, click the required codeset.

DATA INTELLIGENCE SUITE Codeset Manager Enterprise Codesets Codeset Mappings 4 **Category Details** Codesets Workspace Code Value Grid Enterprise Codesets Invironments 2 🔊 Pre Ė- ₩ Codesets 🗄 📲 3rd Party Flat Files Code Name Code Value Code Description Codeset Name Syste 🗄 📲 APJ Demo 🗄 📕 EDW 🗄 🔒 ICD 10 🗄 🔒 ICD 9 🖻 🔒 New\_Cat A\_Codeset(1.00) 🗄 🔒 New\_Category 🗄 🔒 SAP

The Code Value Grid page appears.

- 2. Click 2, to enable edit mode.
- 3. Click 📚 .

The Following page appears.

<	Quick Connection
	Metadata Browser
	Metadata     Srd Party Flat Files     Srd Party Flat Files     A_System     A_Environment     AdventureWorks     Bi     AdventureWorks

4. Expand the **Quick Connection** pane.

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

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

Field Name	Description
	Specifies the database type.
DBType	For example, Sql Server.
	Select the database type from which you wish to scan codes.
	Specifies the JDBC driver name for connecting to the database.
Driver Name	For example, com.microsoft.sqlserver.jdbc.SQLServerDriver
	It is autopopulated depending on the DB type. You can also update the driver name.
IP Address/Host	Specifies the IP address or server host name of the database.
Name	For example, localhost.
	Specifies the port to connect with the database.
Port	For example: 1433 is the default port for a Sql Server database type.
Database Name	Specifies the database name being used to connect to the code- set.
	For example, ErwinDIS931.
	Specifies the name of the system related with the codeset.
System Name	For example, EDW.
System Name	The name of the system should be same as provided in Metadata Manager.
	Specifies the name of the environment related with the codeset.
System Envir-	For example, EDW-DEV.
onment Name	The name of the environment should be same as provided in Metadata Manager.
	Specifies the user name to connect with database.
User Name	For example, sa.
Password	Specifies the password to connect with database.
rassw010	For example, goerwin@1.
URL	Specifies the full JDBC URL that is used to establish a connection
	with the database.

Field Name	Description
	For example, jdbc:sqlserver://SERVER_ NAME:PORT#;data-
	baseName=DatabaseName
	It is autopopulated based on the other parameters.

6. Click 🔀 to test the connection.

On a successful connection, Connection Successful pop-up appears.

- 7. Write an SQL query in the **Query Panel** to fetch the required data from the database.
- 8. Click 🐭 to validate the query.
- 9. Click 🗟 to preview the data.
- 10. Double-click the **Select CSMHeader Template** cell of the required column.

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

🧱 DB Scan							_ 🗆 X
						Sot	<b>d</b>
Query Panel			<	Quick Connection			-
Select*from CAT_DIALOG_TAB			]	*Mandatory Fields		K	
				DBType: *	Sql Server	•	
				Driver Name:	com.micro	soft.sqlserver.jdbc.SC	
				IP Address/Host Name:*	localhost		
				Port:*	1433		
				Database Name:*	ErwinDIS93	1	
				System Name:*	A_System		
							•
				Metadata Browser			<b>^</b>
Query Result							~
# CA	T_DIALOG_TAB_ID	CAT_DIALOG_PROFILE_ID	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROP	ERTIES	CREATED_BY	
Sele	ct CSMHeader Template	Code Value	Select CSMHeader Template	Select CSMHeader Temp	olate	Select CSMHeader 1	emplat 🔺
1 1		Code Name 🔺	DefaultTab			Administrator	
2 2		Code Description	DefaultTab			Administrator	
3 3		System Environment Name Start Date	DefaultTab			Administrator	
4 4		End Date 🔻	DefaultTab			Administrator	
5 5		5	DefaultTab			Administrator	-
•							•
Note*: Only top 50 rows will be displayed in	n grid.						

11. Select the required Code Value Grid column.



12. Click to import the selected columns into the **Code Value Grid**.

The selected columns are imported in the **Code Value Grid**.

Once you import the codes in the Code Value Grid, you can manage codesets.

Managing codesets involves:

- Editing Codesets
- Copying Codesets
- Editing Code Value Grid
- Retiring Codesets

## **Managing Codesets**

Managing Codesets involves the following:

- Editing codesets
- Deleting codesets
- Creating new codeset version
- Publishing codesets
- Copying codesets
- Retiring codesets

You can manage the codesets and update its details.

To manage codesets, follow these steps:

- 1. In the **Codesets Workspace** pane, expand a category.
- 2. Expand the **Codesets** node, and right-click a codeset.

	Codeset Mo	inager		
Lenterprise Codesets Cod	eset Mappings			
Codesets Workspace	-	Category	Details	
🖃 📑 Enterprise Codesets		Code Val	ue Grid	
Environments		2	}	
<ul> <li>3rd Party Flat File</li> <li>APJ Demo</li> <li>EDW</li> <li>erwin DIS</li> </ul>	25		ame	Code Value
E Sales_Cod	deset(1.00)	Admin		1
<ul> <li>ICD 10</li> <li>ICD 9</li> <li>N_Cat</li> </ul>	Edit Codes	deset	lar	2
New_Cat New_Category	Publish Copy Retire		Name	3

3. Use the following options:

### Edit Codeset

Use this option to update codeset's details.

### **Delete Codeset**

Use this option to delete a codeset.

### **New Version**

Use this option to create a new codeset version. For more information on creating new codeset version, refer to <u>Versioning Codesets</u> topic.

#### Publish

Use this option to publish the codesets. For more information on publishing codesets, refer to Publishing Codesets topic.

#### Сору

Use this option to copy the selecte codeset and paste it in different category.

Retire

Use this option to retire a codeset and it is moved to Retired Codesets pane. After you retire a codeset, you cannot retrieve that codeset.

### **Versioning Codesets**

You can version codesets and maintain the legacy of codesets with a record of changed description.

To create new versions of codesets, follow these steps:

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



3. Click New Version.

🎽 New Codeset Version		
		Ľ ×
Codeset Name	New_Codeset	
Codeset Version	1.02	
Codeset Description	desc	
Codeset Version Label		
Codeset Changed Description *	Metadata management	

The New Codeset Version page appears.

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

Field Name	Description
	Specifies the name of the codeset whose version is being cre-
	ated.
Codeset Name	For example, Country Codes.
	It is autopopulated with the codeset name and cannot be
	edited.
Codeset Version	Specifies the new version of the codeset.
	For example, 1.03.
	Specifies the description about the codeset.
	For example: This codeset has code names and code values
Codeset Description	for four countries.
	It is autopopulated with the codeset description and cannot
	be edited.
Codeset Version Label	Specifies the version label of the codeset.
	For example, Beta.
Codeset Changed	Specifies the description about the changes in the codeset.
Description	For example: Code Value for CANADA was changed to CAN.

5. Click 💾.

The new version is created and the older version is archived.

## **Deleting Codes and Codesets**

You can logically delete and restore the codes, and also permanently delete the codesets.

To delete codesets, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager.
- 2. In the Codesets Workspace pane, expand a category.
- 3. Expand a Codesets node and click a codeset.

#### The Code Value Grid appears

DATA INTELLIGENCE SUITE Codeset M	anager							
Enterprise Codesets Codeset Mappings								
Codesets Workspace 🗸 🗸	Category Details							
🖃 🏭 Enterprise Codesets	Code Value Grid							
Environments	🖉 🙆 🚳 í	<b>1</b>					Profile	s: Profile_ABC
🔁 🝶 3rd Party Flat Files 🖃 🝶 APJ Demo	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Extended Properties
<ul> <li>EDW</li> <li>■ ■ ■ erwin DIS</li> <li>■ ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●</li></ul>				]				
	Admin	1		Sales_Codeset	Project_System	$\checkmark$		View
E mathematical setting in the setting in the setting is a set of the set	Joe Villers	4		Sales_Codeset	Project_System			View
🗄 - 📕 ICD 9	Kartik Sridhar	2		Sales_Codeset	Project_System	$\checkmark$		<u>View</u>
<ul> <li>B N_Cat</li> <li>Codesets</li> <li>B m Code_Set(1.00)</li> </ul>	Resource_Name	3		Sales_Codeset	Project_System			View
New_Cat • SAP								

4. Select **Delete Indicator** check box for relevant Codeset Name from the Codeset Value Grid.

A warning message appears.

5. Click Yes.

The code is logically deleted and can be restored or purged.

To restore or purge logically deleted codes, follow these steps:

1. Click 🔡.

The Logically Deleted Codes page appears.

Select Rows	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Start Date	End Date
	Admin	1		Sales_Codeset	Project_System			
	Joe Villers	4		Sales_Codeset	Project_System			
	Kartik Sridhar	2		Sales_Codeset	Project_System			

- 2. Select required rows.
- 3. Click  $\overline{\mathbf{s}}$ , to delete the selected rows.
- 4. Click  $\overline{\mathbf{S}}$ , to restore the selected rows.

To permanently delete codesets, follow these steps:

1. Right-click a codeset.





2. Click Delete Codesets.

A warning message appears.

3. Click Yes.

The codeset is deleted.

# **Publishing Codesets**

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

To create publish environments, follow these steps:

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



3. Click New Environment.

The New Environment page appears.

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

4. Enter Environment Name.

# 5. Click 💾.

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

To publish codesets, follow these steps:

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



3. Click Publish.

The Publish Codesets page appears.

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

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

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

Field Name	Description
	being published.
	For example, Production.

5. Click 💾.

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



Once the source and target codesets are published, you can create code mappings.



You can create code mappings without publishing source or target codesets, but it is recommended that you create code mappings after publishing the codesets.

# **Maintaining Code Mappings**

The Codeset Mappings section in Codeset Manager allows you to define and categorize code mappings. The process is standardized with ability to version and publish code mappings to various environments. Further, these published code mappings can be associated with data item mappings in the Mapping Manager.
Maintaining Code Mapping involves:

- Creating Categories
- Creating code maps
- Versioning codemaps
- Publishing and association codemaps

## **Creating Categories**

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

To create a category, follow these steps:

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



3. Click New Category.

The New Category page appears.

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

4. Enter Category Name and Category Description.

For example:

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

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

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

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



2. Click New Sub Category.

The New Category page appears.

🚦 New Category	_ = ×
	<b>₽</b> ×
Category Name * :	
Category Desc :	

3. Enter Category Name and Category Description.

For example:

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

### 4. Click

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

Once a category is created, you can:

- Creating code crosswalks for mappings
- Verisoning code maps
- Associating code maps with data item mappings

You can also manage it using the options available on the right-clicking category. <u>Managing</u> <u>categories</u> involves:

- Updating categories
- Deleting categories
- Importing legacy maps
- Assigning users

## **Managing Categories**

Managing categories involves:

- Updating categories
- Deleting categories
- Importing legacy maps
- Assigning users

To manage categories, follow these steps:

1. In the **Codesets Mappings** pane, click a category.

The Category Mapping Grid appears.	
------------------------------------	--

DATA INTELLIGENCE SUITE Codeset	Manag	jer				
Enterprise Codesets Codeset Mapping	S					
Code Mappings Workspace 🗸	Code	eset Mapping Grid				
Code Mappings	#	Map Name	Lock Status	Locked By	Description	Created
i - ∰ Mappings i - ∰ map1(1.00) i - ∰ Sub techPubs	1	mapl				Administ

### 2. Right-click a category.

DATA INTELLIGENCE SUITE Codeset	Manag	ger				
Enterprise Codesets Codeset Mapping	S					
Code Mappings Workspace 🔹	Code	eset Mapping Grid				
	#	Map Name	Lock	Locked By	Description	Create
🖻 📲 TechPub 🖶 🕥 Map <u> </u> New Sub Category			Status			
🗄 📰 n 💋 Edit Category		mapl				Adminis
🗄 🚮 Sub t 🗙 Delete Category						
New Map						
🛐 Import Legacy Map	6					
S Assign Users						

3. Use the following options:

#### Edit Category

Use this option to update the category's details.

#### **Delete Category**

Use this option to delete a category. Deleting a category also deletes the maps in it.

#### **Import Legacy Maps**

Use this option to import old maps to the catalog.

#### **Assign Users**

Use this option to assign users to a category based on your organization's projects, departments, functions, and so on.

## **Creating Code Crosswalks (Mappings)**

You can create code crosswalks (mappings) for the source and target codesets in the Codeset Manager. These codesets can have the same or different code values. Using the Auto-Map functionality, you can map source and target codesets with:

- Same code values
- Different code values

## **Creating Code Crosswalks - Source and Target Codesets with Same Code Value**

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

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

DATA INTELLIGEN	CE SUITE Codeset	Manager			
Enterprise Codese	ts Codeset Mapping	S			
Code Mappings Work	space 👻	Codese	ł Mapping Grid		
Code Mappin	gs				
C_Name	valks	#	Source Category	Source Codeset	Source Codeset Version
E- 🔒 Integrated E- 🜏 Mappir		tegory			
🗄 📲 New_Cate	gory 📝 Edit Categor	ry	in DIS	Sales_Codeset	1.00
	Delete Cate	gory	in DIS	Sales_Codeset	1.00
	Import Lega	cy Maps	in DIS	Sales_Codeset	1.00
	Assign Users		in DIS	Sales_Codeset	1.00

1. Right-click the required category.

2. Click New Map.

The New Codeset Map page appears.

🕂 New Codeset Map			_ 🗆 ×
		E	≝ ×
Codeset Map Name*			
Codeset Map Version	1.00		
Codeset Map Description			
Source Codeset		Source	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	les 🔺	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	•
Target Codeset		Target	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	les 🔺	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	•
Auto Map 🔲 *Auto r	mapping occurs	s for source and target codes having the same vo	alues.

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

For example:

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

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

space 👻	Codese	t Mapping Grid						^	Codeset Tree
s	2	6					🥥 🗟 🍪 🕯	2	CodeSets     Srd Party Flat Files
	*	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID	:	APJ Demo     APJ Data_Integration     G-    Codesets
								[	È- 📻 Integrated_Co 🚺 11
00)	1	erwin DIS	Sales_Codeset	1.00	Project_System		710	Α	1 22
	2	erwin DIS	Sales_Codeset	1.00	Project_System		711	J	1 44
	3	erwin DIS	Sales_Codeset	1.00	Project_System		712	ĸ	EDW
	4	erwin DIS	Sales_Codeset	1.00	Project_System		713	R	E-  Codesets
									Codese
	<	Records from	1 to 4 > 3	25 rows per	page 🗸			>	4 
		Records from	1 to 4 > 3	25 rows per	page •	Ø		>	4 CD 10 CD 9 CD 9 Cd 4 N_Cat New_Cat New_Category
	< <u>Cs</u>	*	•	25 rows per	page •	Ď		>	

6. Click  $\stackrel{\text{loc}}{\Longrightarrow}$  to validate the code mapping.

## **Creating Code Crosswalks - Source and Target Codesets with Dif** ferent Code Value

Codesets having different code values can be mapped using the drag and drop method.

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

### 1. Right-click the category.

DATA INTELLIGENCE SUITE	Codeset N	1 anager			
Enterprise Codesets Cod	eset Mappings	_			
Code Mappings Workspace	-	Codese	Mapping Grid		
🖃 🏭 Code Mappings 👜 📲 APJ DEmo					
C_Name		#	Source Category	Source Codeset	Source Codeset Version
🗄 📲 ICD Crosswalks 🖃 📲 Integrated_Datc			_		
🗄 釰 Mappings 🛛 🗴	New Sub Cate	egory			
🗄 🔒 New_Category 💋			in DIS	Sales_Codeset	1.00
	Delete Categ New Map	jory	in DIS	Sales_Codeset	1.00
	Import Legac	y Maps	in DIS	Sales_Codeset	1.00
9	Assign Users		in DIS	Sales_Codeset	1.00

### 2. Click New Map.

The New Codeset Map page appears.

📲 New Codeset Map			_ 🗆 ×
			li ×
Codeset Map Name*			
Codeset Map Version	1.00		
Codeset Map Description			
Source Codeset		Source	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	les	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	•
Target Codeset		Target	
3rd Party Flat Files.Misc Marital Status Cod 3rd Party Flat Files.Misc Gender Codes APJ Demo.Gender Codes EDW.Gender EDW.Marital Status EDW.Country Codes	ies	3rd Party Flat Files 3rd Party Flat Files.3rd Party Flat Files A_System A_System.A_Environment AdventureWorks AdventureWorks.AdentureWorks_Staging	-
Auto Map 📄 *Auto r	mapping occur	s for source and target codes having the same v	/alues.

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

For example:

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

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

**       Source Category       Source Yersion       Source System/Environment       Source Cade Description	orkspace 👻	Codese	et Mapping Grid						^	Codeset Tree
*       Source Category       Source Version       Source System/Environment       Source Cade Description       Source Cade Description<		2	Z)					/ 🗟 🎲 🕯	8	E- # CodeSets
Image: State Stat		*	Source Category			Source System/Environment	Source Code Description	Source Code ID	:	APJ Demo     APJ Data_Integration     E-     Codesets
1     emin Dis     Sales_Codeset     1.00     Project_System     711     1       3     erwin Dis     Sales_Codeset     1.00     Project_System     712     K       4     erwin Dis     Sales_Codeset     1.00     Project_System     713     R       I     Campatible     erwin Dis     Sales_Codeset     1.00     Project_System     713     R       I     Campatible     erwin Dis     Sales_Codeset     1.00     Project_System     713     R       I     Campatible     erwin Dis     Sales_Codeset     1.00     Project_System     713     R       I     Campatible     erwin Dis     Sales_Codeset     1.00     Project_System     713     R       I     Campatible     erwin Dis     Sales_Codeset     1.00     Project_System     713     R       I     Campatible     erwin Dis     Incore     Incore     Incore     Incore       I									[	integrated_C
2     erwin DIS     Sdes_Codeset     1.00     Project_System     711     J       3     erwin DIS     Sdes_Codeset     1.00     Project_System     712     K       4     erwin DIS     Sdes_Codeset     1.00     Project_System     713     R       4     erwin DIS     Sdes_Codeset     1.00     Project_System     713     R       K     Records from 1 to 4     > 1     25 rows per page •		1	erwin DIS	Sales_Codeset	1.00	Project_System		710	Α	- 1 22
3     attent_codesation     1.00     Project_system     712     N       4     erwin DIS     Sciles_Codeset     1.00     Project_System     713     R       K     Records from 1 to 4     >>        25 rows per page •     B*     Code       CSM MapSpec Overview     , Code     Code     0     0		2	erwin DIS	Sales_Codeset	1.00	Project_System		711	J	- 1 44
4         erwin DIS         Sales_Codeset         1.00         Project_System         713         R		3	erwin DIS	Sales_Codeset	1.00	Project_System		712	К	
Construction of the second se		4	erwin DIS	Sales_Codeset	1.00	Project_System		713	R	E 🕢 Codesets
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		<	< Records from	1 to 4 > 3	25 rows per	page 🖕				
Codeset Map Name Integrated Map			1	1 to 4 > 3	25 rows per				•	🕀 📕 ICD 9

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

Nappings Workspace 🗸 🗸	Code	set Mapping Grid							^	Codes	et Tree	
Code Mappings APJ DEmo							Ø (	2 🖶 🎲 🛿		B- 1	CodeSet	s arty Flat Files
	me	Source Code Value	Target Code Value	Target Code Name	Target Code ID	Target Code Descriptic	Target System/Environment	Target Codeset	Targe Versi		🚦 APJ D	emo Integration
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New_Category												
		3								۰	N_Ca	t
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	<	3							>	€	N_Ca	t Cat
	<	3 SM MapSpec Overview	-						>	€	N_Ca	t Cat
	<		-				Ø		>	€	N_Ca	t Cat

10. Click 📕.

The code mappings are successfully saved.

11. Click 💱 to validate the code mapping.

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

Use the following options:

### Export

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

### **Extend Mapping Grid**

To extend the Codeset Mapping Grid, click

Once the code map is created, you can:

- Edit Code Mappings
- Create new version of the code map
- Publish and associate the code map with data item mappings

## **Editing Code Mappings**

You can update source codesets and target codesets in the Codeset Mapping Grid.

To update source codesets, follow these steps:

- 1. Go to Application Menu > Data Catalog > Codeset Manager > Codeset Mappings.
- 2. In the **Code Mappings Workspace** pane, expand a category and click a codemap.

The Codeset Mapping Grid and CSMMapSpec Overview pane appears.

DATA INTELLIGENCE SUITE Codeset		ſ					Search		۹	¢ (	96	8
Enterprise Codesets Codeset Mapping Code Mappings Workspace		et Mapping Grid						^	Codeset Tre	e		•
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B C_Name B D C_Name E DW E C_C Crosswalks	*	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID	s	🖭 🔒 🖉	APJ Demo Data_Integ		
E- 🝶 Integrated_Data E- 🥘 Mappings								[		erwin DIS CD 10		
<ul> <li>Integrated_Map(1.00)</li> <li>Map1(1.00)</li> </ul>	1	erwin DIS	Sales_Codeset	1.00	Project_System		710	Ac	÷. 1			
New_Category	2	erwin DIS	Sales_Codeset	1.00	Project_System		711	Jo	🖻 🔒 I	New_Cat		
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	Cod	Records from M MapSpec Overview esef Map Name esef Map Version	•	Pi 25 rows per egrated_Map	page .	Ø		>				
Published Code Mappings	Cod	eset Map Description	Co	de map when source	e and target have different code	values.		~				

3. In CSM Mapping Overview pane, click 🖉.

You can update Codeset Map Name and Codeset Map Description.



You cannot edit Codeset Map Version.

- 4. Select a new Source Codeset and Source System/Environment.
- 5. Select a Target Codeset and Target System/Environment.
- 6. Click 💾.

The Codeset Mapping Grid is updated with the new source codeset. But, the target codeset doesn't update in the Codeset Mapping Grid. You need to drag and drop target codeset from the Codeset Tree to Codeset Mapping Grid.

•••	et Manager						Search	1	Q	¢ 0	8 8
Enterprise Codesets Codeset Mappi	ngs										•
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Code Mappings	2						9	a) 🍪 😫	C 11	odeSets 3rd Party Flat File	es
C_Name     G_B     EDW     CD Crosswalks	urce Code ID	Source Code Name	Source Code Value	Target Code Value	Target Code Name	Target Code ID	Target Code Descriptio	Target System/Envire	÷- 🔒	APJ Demo Data_Integratio	
Integrated_Data										erwin DIS ICD 10	
Integrated_Map(1.00)		Admin	1						÷-	ICD 9	
Image: Barrier Bar		Joe Villers	4						÷- 🔒	N_Cat New_Cat	
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	Codeset Ma	p Version	1.00								
	Codeset Ma	p Description	Code map when s	ource and target h	ave different code value	es.					
Published Code Mappings				Ŭ				~			

To update target codeset in the Codeset Mapping Grid, follow these steps:

1. In the Codeset Mapping Grid, click 🜌 .

The Codeset is locked and other users cannot make changes.

- 2. In the Codeset Tree, expand the target category and the **Codesets** node.
- 3. Drag and drop the target codeset into the Code Set Mapping Grid under the Target Code Value column.
- 4. Click 💾.

The target codeset is updated in the Codeset Mapping Grid.

To update target code values in the Codeset Mapping Grid, follow these steps:

- 1. In the Codeset Mapping Grid, click 🧟.
- 2. Double-click a cell under the Target Code Value column and update it with the one of the options available.

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Code Mappings Workspace 👻	Codeset Mapping Grid							^	Codeset Tree >
Code Mappings     APJ DEmo	2 💰					6	) 🗟 🖶 🌠 🛚		CodeSets     Grant Files
APJ DEMO     C_Name     DW     CD Crosswalks	Source Code Name	Source Code Value	Target Code Value	Target Code Name	Target Code ID	Target Code Descriptio	Target System/Environment	Targe	B APJ Demo
🛱 🚂 Integrated_Data Admin I <sup>11</sup> Admin 714 Project_System Integr	E Integrated_Codes								
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E ✓ Map1(1.00) E ↓ Wew_Category	Kartik Sridhar	2	22 (Integrated_Co 33 (Integrated_Co	Resource_Name	717		Project_System	Integr	- 1 33
H. I Inew_Calegory	Resource_Name	3	Clear Target	Joe Villers	715		Project_System	Integr	🗄 🔒 EDW
	Codesel Map Name Codesel Map Version Codesel Map Version	Inte 1.0		and target have diffe	rrent code values.			> > ~	erwin DIS     codesets     codesets
Published Code Mappings								$\sim$	<

3. Click 💾.

The target code values are updated.

## **Versioning Code Mappings**

You can create versions of code mappings and track legacy of a code map.

The new version is available in the Code Mappings Workspace under the Mappings tree.

To create new versions of code mappings, follow these steps:

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

DATA INTELLIGENCE SUITE Codeset	Manager				Se	arch	Q	¢ 0	
Enterprise Codesets Codeset Mapping	<b>J</b> S								•
Code Mappings Workspace 🗸						^	Codeset Tree		>
Code Mappings  APJ DEmo  C_Name	# Map Name	Lock Locked Status By	Description	Created Cre By Time	eated Date Last ne Modified By	Last Modified Date Time	CodeSets	ty Flat Files	
								DIS	
	Delete Map New Version						■ New_C ■ New_C ■ SAP	ategory	
	Import Excel Copy								
4						•			
Published Code Mappings						^			

- 3. Click **New Version**.
- 4. The New Codeset Map Version page appears.

🍟 New Codeset Map Version		_ 🗆 🗙
		×
Codeset Map Name*	New_Codeset_Map	
Codeset Map Version	1.02	
Codeset Map Description		
Map Version Label		
Map Changed Description*		

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					
Codeset Map	pecifies the name of the codeset map.					
Name	specifies the name of the codeset map.					

Field Name	Description				
	For example, Gender Crosswalk.				
Codeset Map	Specifies the new version of the codeset map.				
Version	or example, 1.02.				
Codeset Man	Specifies the description about the codeset map.				
Codeset Map Description	For example: The codeset map is the code mappings between the				
Description	two codesets, Misc Gender Codes and Gender.				
Map Version	Specifies the version label of the codeset map.				
Label	For example, Beta.				

## 6. Click

The new version is created and saved in the Mappings tree while the older version is archived.

## Associating Code Maps with Data Item Mappings

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

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

### **Publishing Code Maps**

To publish code maps, follow these steps:

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

The available options appear.

DATA INTELLIGENCE SUITE	Codeset Mana	ger	
Enterprise Codesets Code	eset Mappings		
Code Mappings Workspace	-		
Code Mappings	Delete Map     New Version     New Intervention     Publish     Import Excel     Copy	Map Name	Lock Status

3. Click Publish.

The Publish Codeset Map page appears.

🖹 Publish Codeset Map	_ 🗆 ×
	li ×
Codeset Map Name*	Integrated_Map
Codeset Map Version	1.01
Codeset Map Description	Code map when source and target have different code values.
Map Version Label	
Map Changed Description*	Updated Code Values.
Publish Environment*	DEV ^ PROD Production Test ~

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

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

# 5. Click 💾.

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

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



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

### **Associating Code Maps**

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

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

The Mapping Specification grid appears.

space Mappings 🔹 👻	1	Mapping Specific	ation Grap	hical Designer	Test Specification	Workflow Lo	og	,
Mappings ^	20	i 🔯 🖩 🍣 (B	rwin_Map]			Profiles: Defau	t 🗖	İ 🗘 🐧 👯 🗟 < 🗵
Projects     Data Lake Migration (3)     EDW (3)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>ERP (2)</li> <li>Erwin_Project (4)</li> <li>Transformations</li> </ul>	1	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	int	5	TRUNC
<ul> <li>Test Cases</li> <li>Mappings</li> <li>Firwin Map</li> <li>Mapping Test Andrea</li> </ul>	2	erwinDIS	Data_Migration	dbo.ADS_ASSOCI.	ID	bigint	80	TRUNC
MappingTargets     MappingTargets     TriaLMap	3	erwinDIS	Data_Migration	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	bigint	8	ABS
Erwin_Subject (1)	4	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_PRO	int	4	

3. Click 🌌.

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

•	Mapping Specific	ation Grapl	hical Designer	Test Specific	cation Workflow Log	g		×
20	I 🔯 🔳 🍣 (E	🕸 🗟 👯 🗟 < 🛛						
#	Source System Name	Source Environment Name	Source Table Name	Source Col Name	Source Column           Data Type           Target Column Class	Source Column Lenath	Business Rule	
1	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALC	Target Column Alias     Target Business Key Flag     CSM Mapping	9	TRUNC	~
2	erwinDIS	Data_Migration	dbo.AD\$_A\$\$OCI,	ID	Specification Artifacts Cookup Reference Colun Lookup On	nn 🗸	TRUNC	
3	erwinDIS	Data_Migration	dbo.ADS_ASSOCI	SOURCE_OB	< JJECT_ bigint	8	ABS	

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

The CSM Mapping Column appears in the Mapping Specification grid.

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

4 Mapping	g Specification	Graphical Desi	gner Test Spe	ecification W	Workflow Log		Metadata Catalogue 🔍
💰 🖬 🛃 🛛		[Erwin_Map]	Profiles:	Default	- ©	🐧 👯 🗟 🖬 📾 😣 < 🗵	Code Mappings Catalogue
arget Column ength	Created By	Created Date	CSM Mapping	Last Modified By	Last Modified Date Time	Reference Table	Code Mappings
		2019-10-21 14:36	5:15.057				▶ <b>E</b> DW
	Administrator	2019-10-21 14:36:15.057	Integrated_Map(1	1.00) <sup>hinistrator</sup>	2019-12-10 14:49:07.187		<ul> <li>CD Crosswalks</li> <li>Integrated_Data</li> <li>Mappings</li> <li>Integrated_Map(1, 1, 100)</li> <li>New_Category</li> </ul>
	Administrator	2019-10-21 14:36:15.057		Administrator	2019-12-10 14:49:07.187		

# 8. Click 🔜.

The code map is associated with the data item mappings.