



erwin Data Intelligence

Reference Data Management Guide

Release v13.0

Legal Notices

This Documentation, which includes embedded help systems and electronically distributed materials (hereinafter referred to as the Documentation), is for your informational purposes only and is subject to change or withdrawal by Quest Software, Inc and/or its affiliates at any time. This Documentation is proprietary information of Quest Software, Inc and/or its affiliates and may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of Quest Software, Inc and/or its affiliates

If you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all Quest Software, Inc and/or its affiliates copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to Quest Software, Inc and/or its affiliates that all copies and partial copies of the Documentation have been returned to Quest Software, Inc and/or its affiliates or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, QUEST SOFTWARE, INC. PROVIDES THIS DOCUMENTATION AS IS WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL QUEST SOFTWARE, INC. BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF QUEST SOFTWARE, INC. IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is Quest Software, Inc and/or its affiliates Provided with Restricted Rights. Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2023 Quest Software, Inc. and/or its affiliates All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

Contact erwin

Understanding your Support

Review [support maintenance programs and offerings](#).

Registering for Support

Access the [erwin support](#) site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for [erwin Data Intelligence \(erwin DI\)](#), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit <http://erwin.com/>.

Provide Feedback

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

News and Events

Visit [News and Events](#) to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

Contents

Managing Reference Data	7
Using Reference Data Manager	8
Creating Reference Folders	9
Managing Reference Folders	11
Creating Reference Tables	13
Importing Data from Spreadsheets	15
Adding Columns to Reference Tables	18
Adding Column Values Manually	21
Importing Column Values from MS Excel Files	23
Importing Column Values Through DB Scans	25
Managing Reference Tables	29
Creating Publish Environments	31
Adding Validation Rules	32
Associating Validation Rules with Reference Tables	35
Running Validations Against Reference Tables	37
Associating Codesets With Reference Tables	39
Versioning Reference Tables	41
Publishing Reference Tables	44
Associating Reference Tables with Mappings	48
Using Codeset Manager	50
Maintaining Enterprise Codesets	52
Creating Categories	53

Managing Categories	55
Assigning Users	57
Adding Codesets	59
Entering Codes Manually	61
Importing Codes using MS Excel Files	65
Importing Codes into Code Value Grid using DB Scan	67
Managing Codesets	72
Versioning Codesets	75
Deleting Codes and Codesets	77
Publishing Codesets	80
Maintaining Code Mappings	84
Creating Categories	85
Managing Categories	88
Creating Code Crosswalks (Mappings)	90
Creating Code Crosswalks - Source and Target Codesets with Same Code Value	90
Creating Code Crosswalks - Source and Target Codesets with Different Code Value	92
Editing Code Mappings	97
Versioning Code Mappings	100
Associating Code Maps with Data Item Mappings	102
Publishing Code Maps	102
Associating Code Maps	104

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.

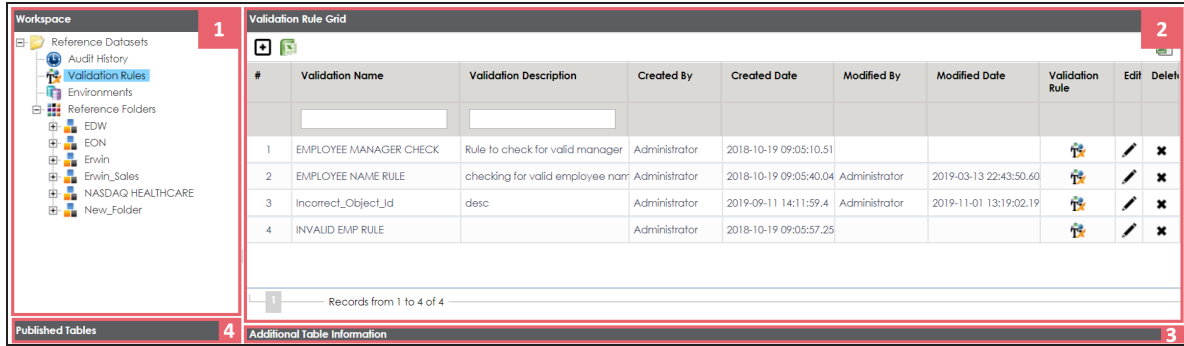
For further information on accessing and using the Reference Data Manager, refer to the [Using Reference Data Manager](#) topic.

- 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:



UI Section	Function
1-Workspace	Use this pane to browse and work on validation rules, environments, reference folders, and reference tables.
2-Right Pane	Use this pane to work on the data based on your selection in the Workspace pane.
3-Additional Table Information	Use this pane to view or work on additional information of a reference 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:

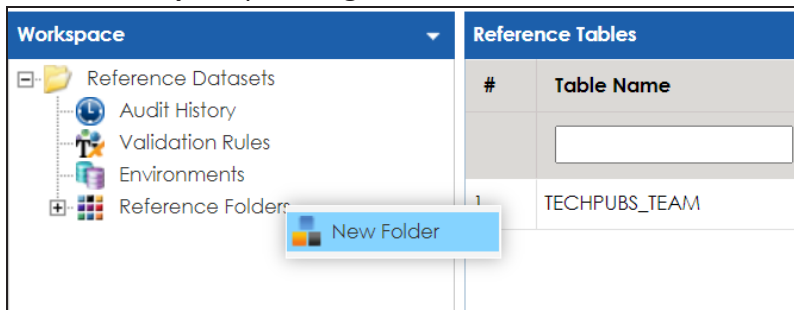
- [Creating reference folders](#)
- [Creating reference tables](#)
- [Creating publish environments](#)
- [Adding validation rules](#)
- [Associating codesets with reference tables](#)
- [Versioning reference tables](#)
- [Publishing reference tables](#)
- [Associating reference tables with mappings](#)

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.



3. Click **New Folder**.

The New Folder page appears.

The 'New Folder' dialog box is shown. It has a title bar with 'New Folder' and standard window controls. Below the title bar are two input fields: 'Folder Name*' with a text box and 'Folder Description:' with a larger text area. There are also icons for a document and a close button (X) in the top right corner.

4. Enter the **Folder Name** and **Folder Description**.

For example:

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

Creating Reference Folders

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 right-clicking the reference folder. [Managing reference folders](#) involves:

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

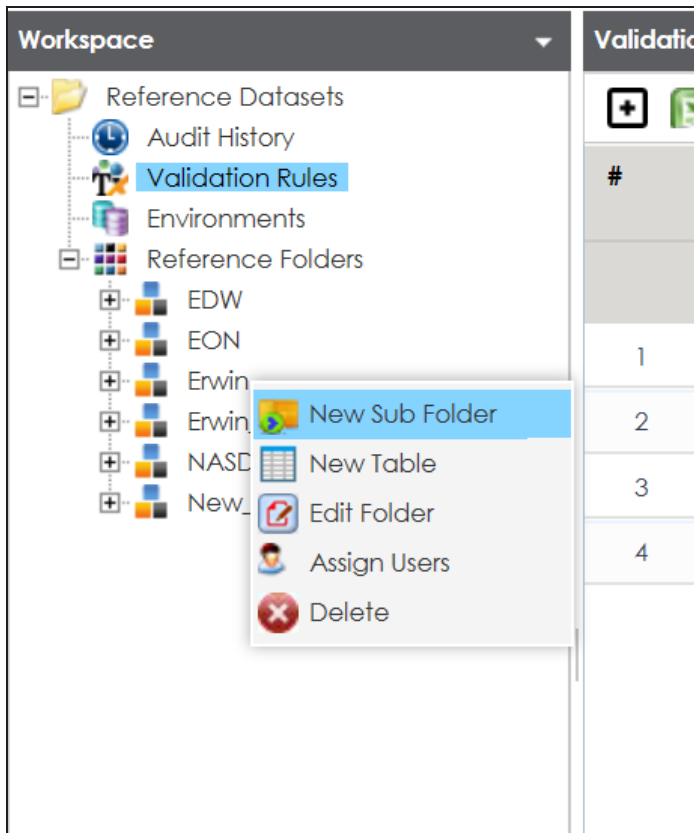
Managing Reference Folders

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

Managing Reference Folders





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.

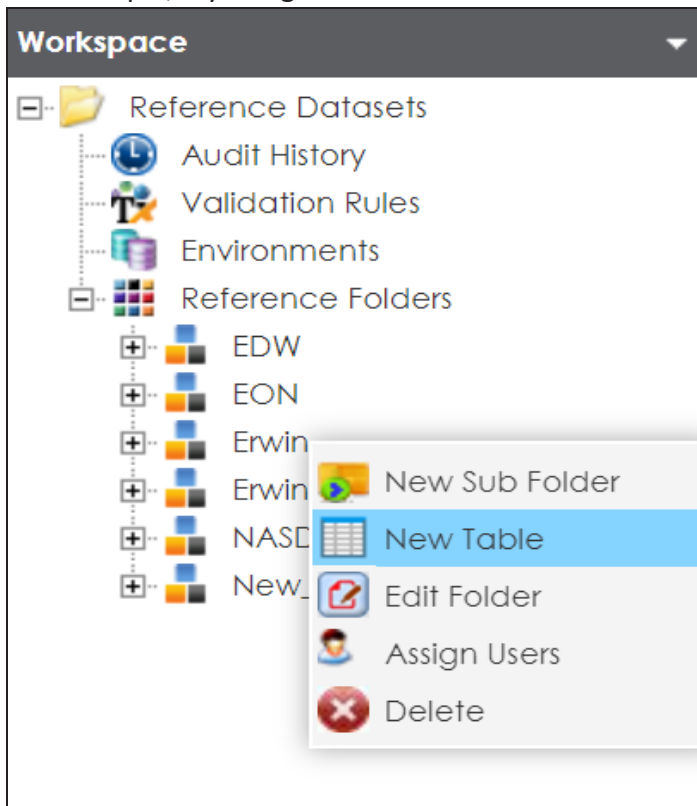
Creating Reference Tables

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.

Creating Reference Tables

The screenshot shows a 'New Reference Table' dialog box with the following fields and values:

- Folder Name: Erwin
- Table Name*: (empty)
- Version: 1.00
- Owner*: (empty)
- Data Steward: -Select Data Steward-
- Description: (empty)
- Import Data from Spreadsheet:

At the bottom of the dialog, there are three icons: a plus sign (+), a close sign (x), and a minus sign (-). Below the dialog, a table header is visible with two columns: 'Column Name' and '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
Folder Name	Specifies the name of the reference folder. 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.
Version	Specifies the version of the reference table. For example, 1.00. It is autopopulated and cannot be edited.
Owner	Specifies the reference table owner's name. For example, Talon Smith.
Data Ste-	Specifies the name of the data steward responsible for the reference

Creating Reference Tables

Field Name	Description
ward	table. For example, Jane Doe. 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.
Description	Specifies the description about the reference table. For example: This reference table serves as domain for the data classification column.
Import Data from Spreadsheet	Use this check box to import reference data into the reference table from the XLSX file. For more information, refer to the Importing Data from Spreadsheets section below.

5. Click .

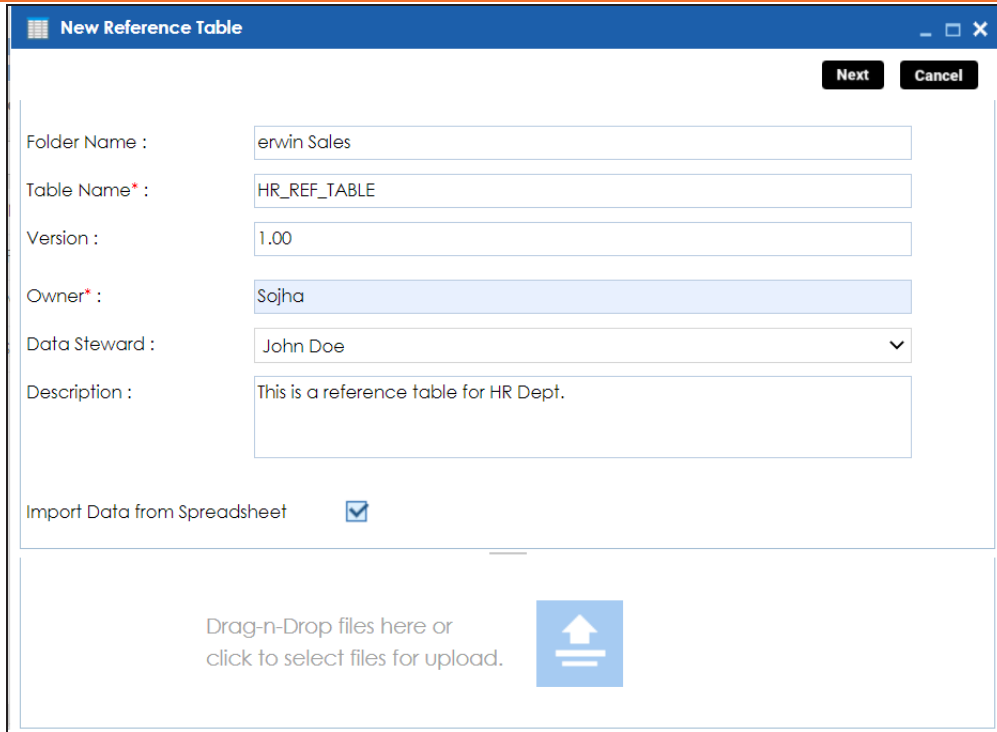
A reference table is created and saved in the Reference Tables tree.

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.

Creating Reference Tables



Folder Name : erwin Sales

Table Name* : HR_REF_TABLE

Version : 1.00


Owner* : Sojha

Data Steward : John Doe

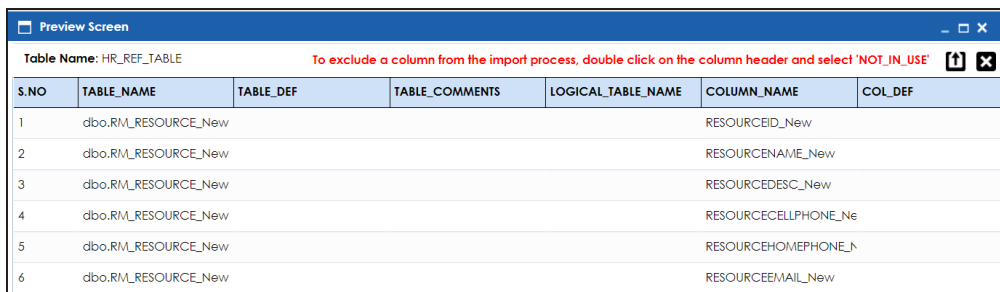
Description : This is a reference table for HR Dept.

Import Data from Spreadsheet

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**.



S.NO	TABLE_NAME	TABLE_DEF	TABLE_COMMENTS	LOGICAL_TABLE_NAME	COLUMN_NAME	COL_DEF
1	dbo.RM_RESOURCE_New				RESOURCEID_New	
2	dbo.RM_RESOURCE_New				RESOURCENAME_New	
3	dbo.RM_RESOURCE_New				RESOURCEDESC_New	
4	dbo.RM_RESOURCE_New				RESOURCECELLPHONE_Ne	
5	dbo.RM_RESOURCE_New				RESOURCEHOMEPHONE_N	
6	dbo.RM_RESOURCE_New				RESOURCEEMAIL_New	

4. Click .

The reference data is imported into the reference table.

If you do not click the Import Data from Spreadsheet check box, you need to [add columns](#) to the reference table and then add column values:

Creating Reference Tables

- [Manually](#)
- [From MS Excel files](#)
- [Through DB scans](#)

You can manage a reference table using the options available on right-clicking the reference table. [Managing reference tables](#) involves:

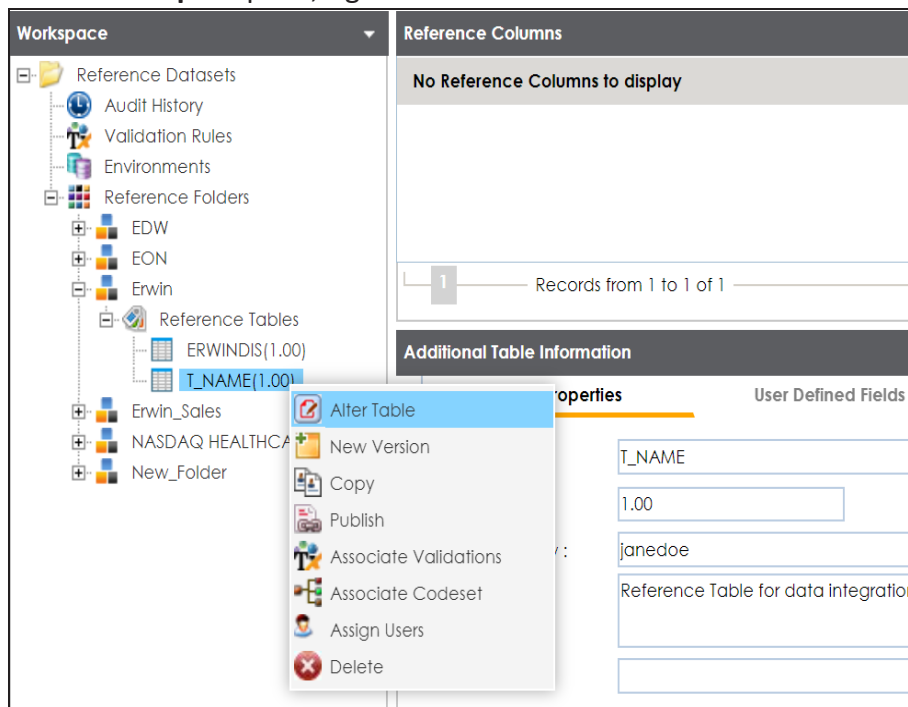
- Altering reference tables
- Copying reference tables
- Assigning users to reference tables
- Deleting reference tables

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:

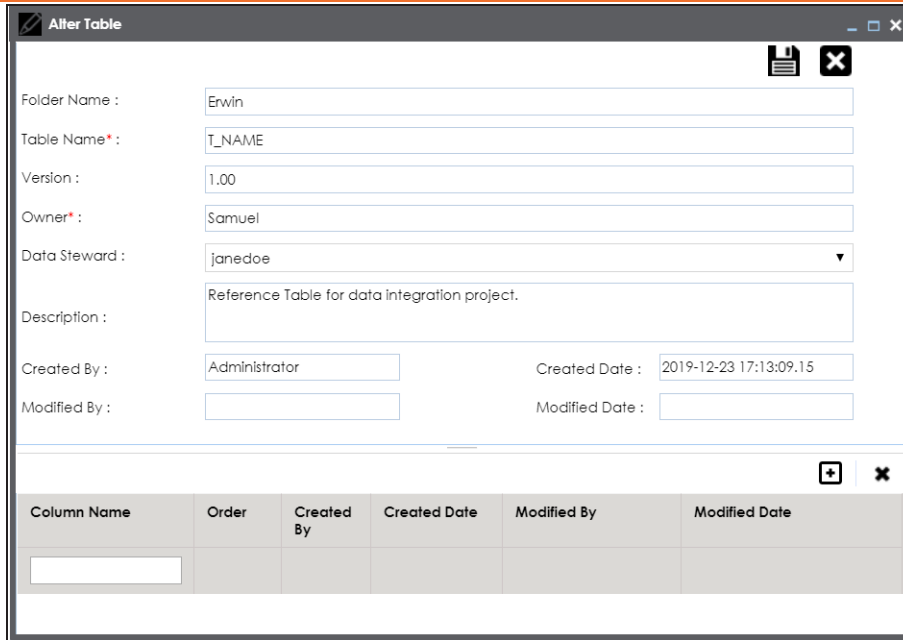
1. In the **Workspace** pane, right-click a reference table.



2. Click **Alter Table**.

The Alter Table page appears.

Adding Columns to Reference Tables



The screenshot shows the 'Alter Table' dialog box with the following fields:

- Folder Name : Erwin
- Table Name* : T_NAME
- Version : 1.00
- Owner* : Samuel
- Data Steward : janedoe
- Description : Reference Table for data integration project.
- Created By : Administrator
- Created Date : 2019-12-23 17:13:09.15
- Modified By :
- Modified Date :

Below the fields is a table with the following columns:

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.

Adding Columns to Reference Tables

Alter Table

Folder Name : Erwin

Table Name* : T_NAME

Version : 1.00

Owner* : Samuel

Data Steward : janedoe

Description : Reference Table for data integration project.

Created By : Administrator Created Date : 2019-12-23 17:13:09.15

Modified By : Modified Date :

Column Name	Order	Created By	Created Date	Modified By	Modified Date
ID	1				

5. Click .

The columns are added to the reference table.

Workspace

Reference Columns

ID	NAME	CREATED BY	CREATED DATE
No Records Found			

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

- [Manually](#)
- [From MS Excel files](#)
- [Through DB scans](#)

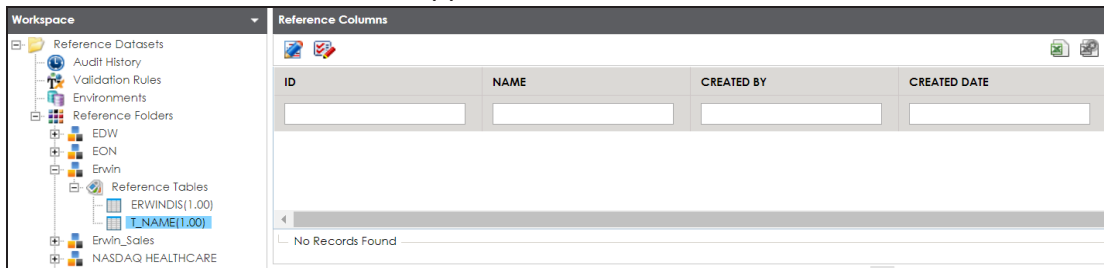
Adding Column Values Manually



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 [Adding Columns to Reference Tables](#) topic.

To add column values manually, follow these steps:

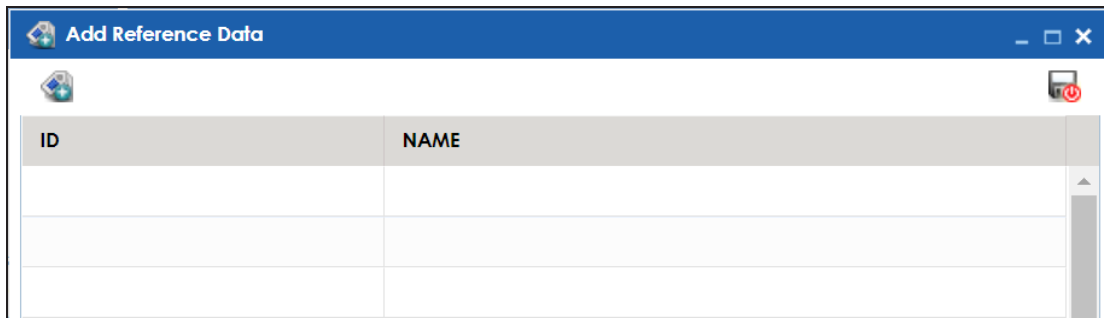
1. In the **Workspace** pane, click a reference table.

Columns in the reference table appears.



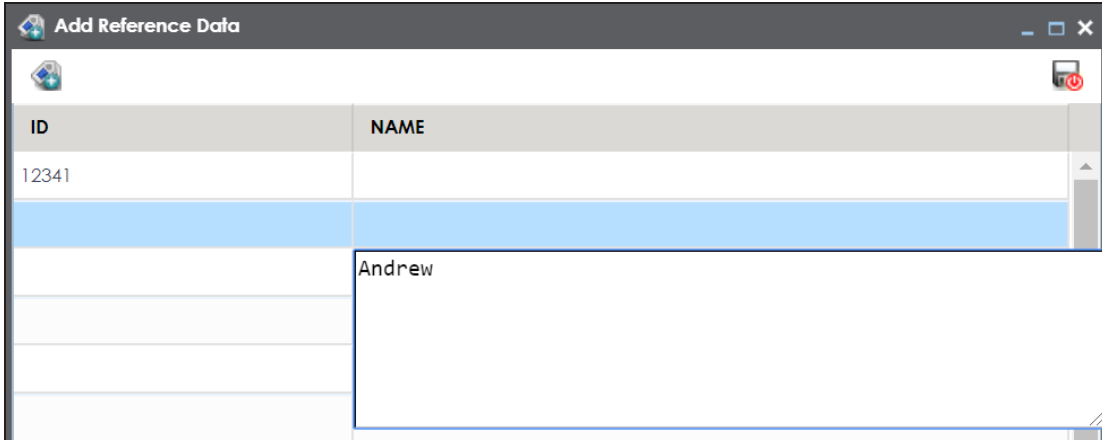
2. Click .
3. Click .

The Add Reference Data page appears.



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

Adding Column Values Manually



The screenshot shows a window titled "Add Reference Data" with a table. The table has two columns: "ID" and "NAME". The "ID" column contains the value "12341". The "NAME" column contains the value "Andrew". A blue highlight is visible on the row containing "12341" and "Andrew".

ID	NAME
12341	Andrew

5. Click .

The column values are added to the reference table.

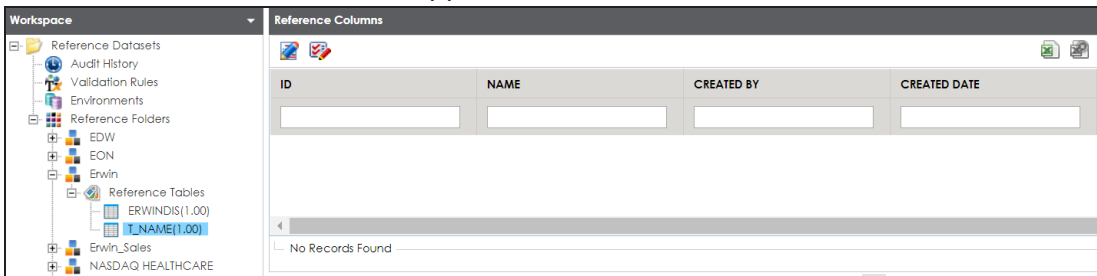
Importing Column Values from MS Excel Files



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 [Adding Columns to Reference Tables](#) topic.

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

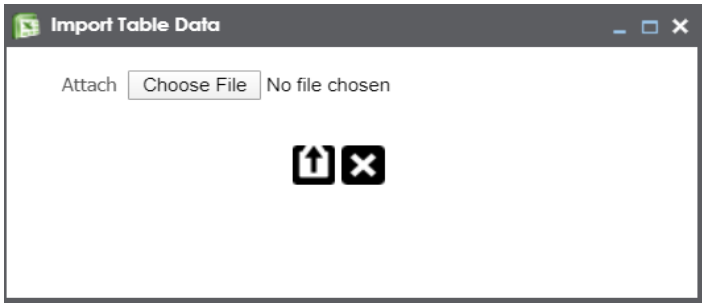
1. In the **Workspace** pane, click a reference table.


Columns in the reference table appear.



2. Click .
3. Click .

The Import Table Data page appears.



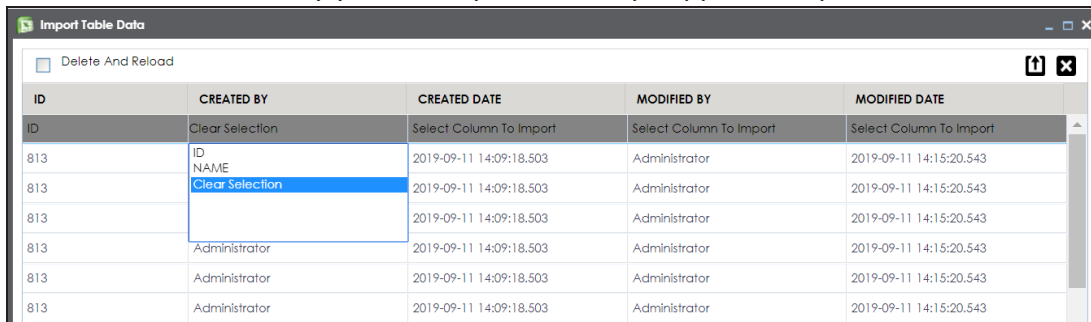
4. Click **Choose File** and browse and select the XLSX file.
5. Click .

The Import Table Data page appears.

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

Importing Column Values from MS Excel Files

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



ID	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE
ID	Clear Selection	Select Column To Import	Select Column To Import	Select Column To Import
813	ID	2019-09-11 14:09:18.503	Administrator	2019-09-11 14:15:20.543
813	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	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 .

The column values are imported from the XLSX file.

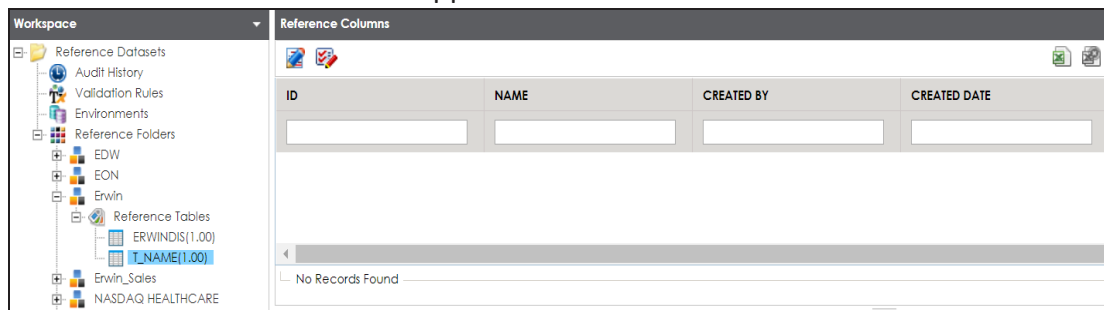
Importing Column Values Through DB Scans


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.

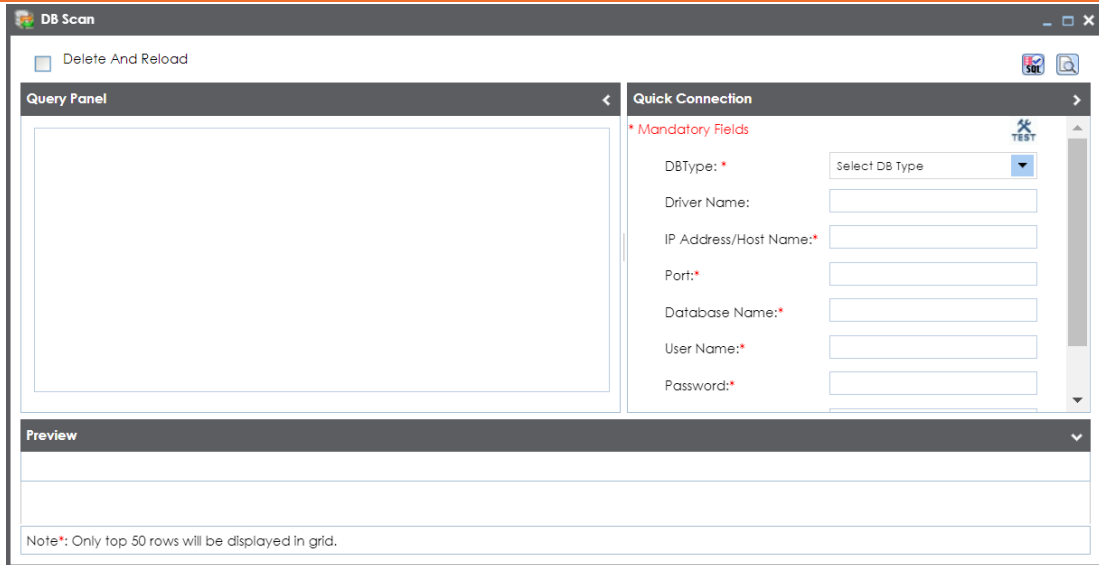
Columns in the reference table appear.



2. Click .
3. Click .

The DB Scan page appears.

Importing Column Values Through DB Scans



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
DB Type	Specifies the database type. For example, Sql Server.
Driver Name	Specifies the JDBC driver name for connecting to the database. For example, com.microsoft.sqlserver.jdbc.SQLServerDriver The field is autopopulated based on the DB Type.
IP Address/Host Name	Specifies the IP address or server host name of the database. For example, localhost.
Port	Specifies the port to connect with the database. 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 reference table. For example, ErwinDIS931.
User Name	Specifies the user name to connect with the database.

Importing Column Values Through DB Scans


Field Name	Description
	For example, sa.
Password	Specifies the password to connect with the database. For example, goerwin@1.

5. Click  to test the connection.

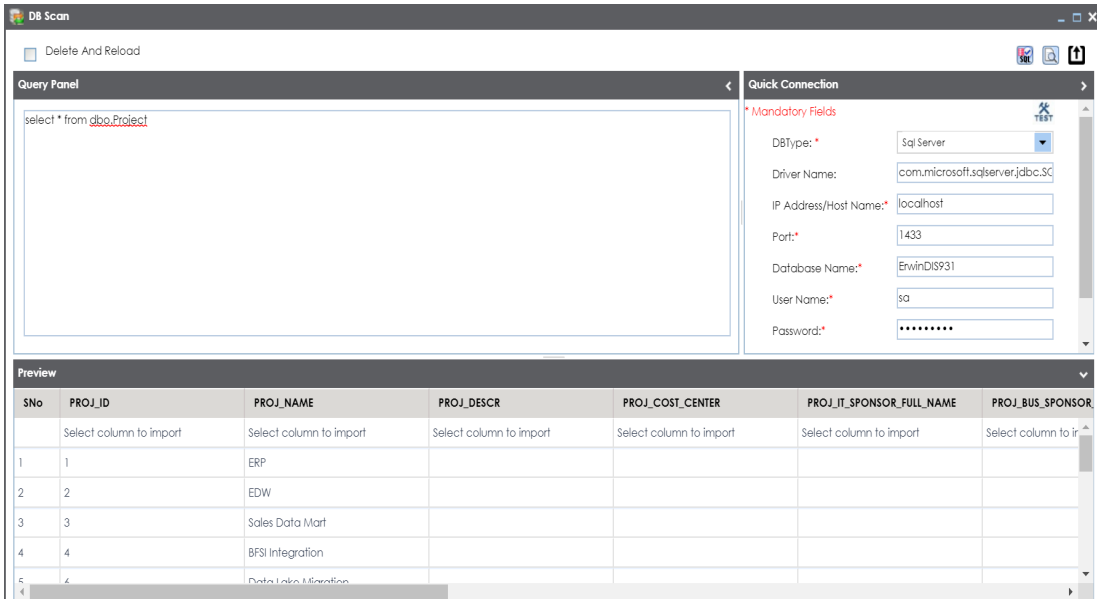
If the connection is established, the success message appears.

6. Write a query in the **Query Panel** to pull the data from the database.

7. Click  to validate the query.

8. Click  to preview the data.

The data is previewed.



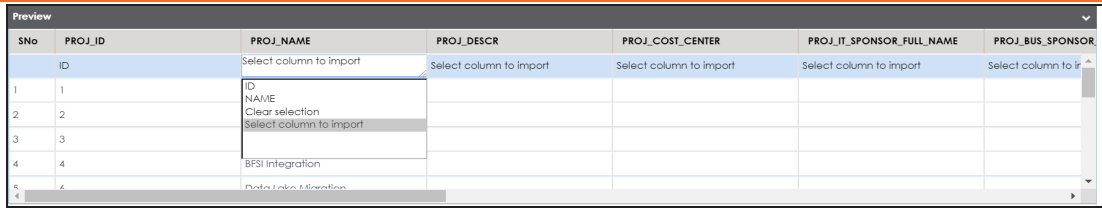
The screenshot shows the DB Scan application interface. It includes a 'Query Panel' with the query 'select * from dbo.Project', a 'Quick Connection' panel with fields for DBType (Sql Server), Driver Name (com.microsoft.sqlserver.jdbc.S), IP Address/Host Name (localhost), Port (1433), Database Name (ErwinDIS931), User Name (sa), and Password (masked). Below these is a 'Preview' section displaying a table with columns: SNo, PROJ_ID, PROJ_NAME, PROJ_DESCR, PROJ_COST_CENTER, PROJ_IT_SPONSOR_FULL_NAME, and PROJ_BUS_SPONSOR. The table contains five rows of data, with the first row having '1' in the SNo column and 'ERP' in the PROJ_NAME column.

SNo	PROJ_ID	PROJ_NAME	PROJ_DESCR	PROJ_COST_CENTER	PROJ_IT_SPONSOR_FULL_NAME	PROJ_BUS_SPONSOR
	Select column to import	Select column to import	Select column to import	Select column to import	Select column to import	Select column to ir
1	1	ERP				
2	2	EDW				
3	3	Sales Data Mart				
4	4	BFSI Integration				
5	4	Data Lake Migration				

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

A drop-down option appears displaying the reference columns.

Importing Column Values Through DB Scans



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 import
1	1	ID				
		NAME				
2	2	Clear selection				
		Select column to import				
3	3					
4	4	BFSI Integration				
5	5	Data Lake Migration				
6	6					

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.

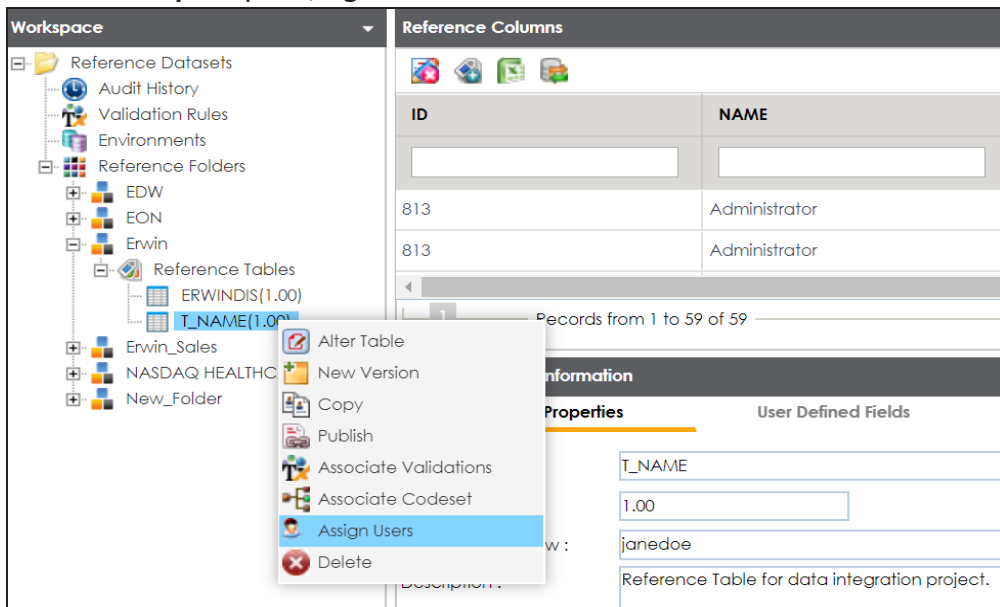
Managing Reference Tables

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.



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.





Copy

Managing Reference Tables

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 ( 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

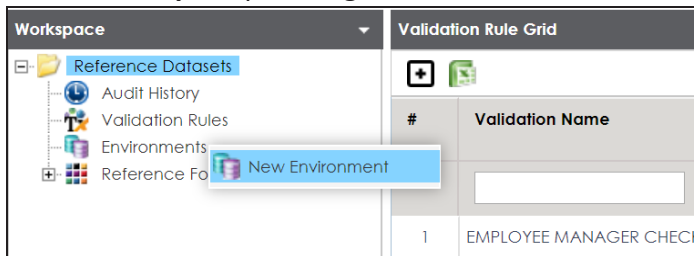
Use this option to delete a reference table that is no longer required.

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.

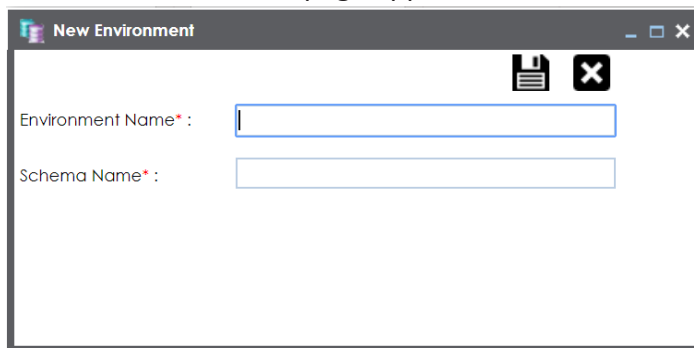
To create publish environments, follow these steps:

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.



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.

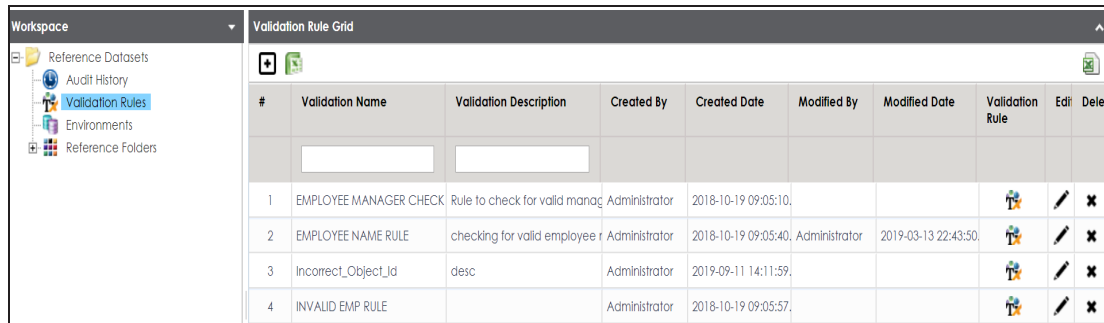
Adding Validation Rules

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.

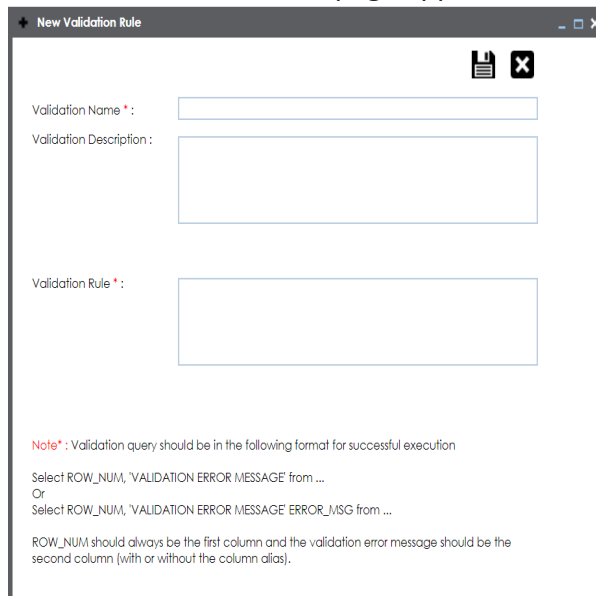
The Validation Rule Grid page appears.



#	Validation Name	Validation Description	Created By	Created Date	Modified By	Modified Date	Validation Rule	Edit	Delete
1	EMPLOYEE MANAGER CHECK	Rule to check for valid manag	Administrator	2018-10-19 09:05:10.					
2	EMPLOYEE NAME RULE	checking for valid employee r	Administrator	2018-10-19 09:05:40.	Administrator	2019-03-13 22:43:50.			
3	Incorrect_Object_Id	desc	Administrator	2019-09-11 14:11:59.					
4	INVALID EMP RULE		Administrator	2018-10-19 09:05:57.					

3. Click .

The New Validation Rule page appears.



Validation Name * :

Validation Description :

Validation Rule * :

Note* : Validation query should be in the following format for successful execution

Select ROW_NUM, 'VALIDATION ERROR MESSAGE' from ...
Or
Select ROW_NUM, 'VALIDATION ERROR MESSAGE' ERROR_MSG from ...

ROW_NUM should always be the first column and the validation error message should be the second column (with or without the column alias).

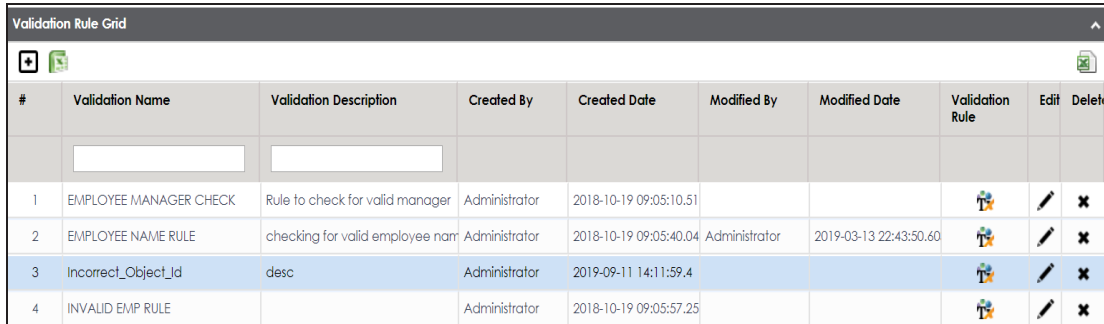
Adding Validation Rules









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. For example, Incorrect_Object_ID.
Validation Description	Specifies the description about the validation rule. For example: This validation rule validates the ERWIN_SALES reference 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.



#	Validation Name	Validation Description	Created By	Created Date	Modified By	Modified Date	Validation Rule	Edit	Delete
1	EMPLOYEE MANAGER CHECK	Rule to check for valid manager	Administrator	2018-10-19 09:05:10.51					
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			
3	Incorrect_Object_Id	desc	Administrator	2019-09-11 14:11:59.4					
4	INVALID EMP RULE		Administrator	2018-10-19 09:05:57.25					

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

Validation Rule

Use this option to view validation rule queries.

Edit

Use this option to update validation rules.

Delete

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

Once a validation rule is added, you can:

Adding Validation Rules

1. [Associate it with a reference table](#)
2. [Run validation against the reference table](#)

Associating Validation Rules with Reference Tables

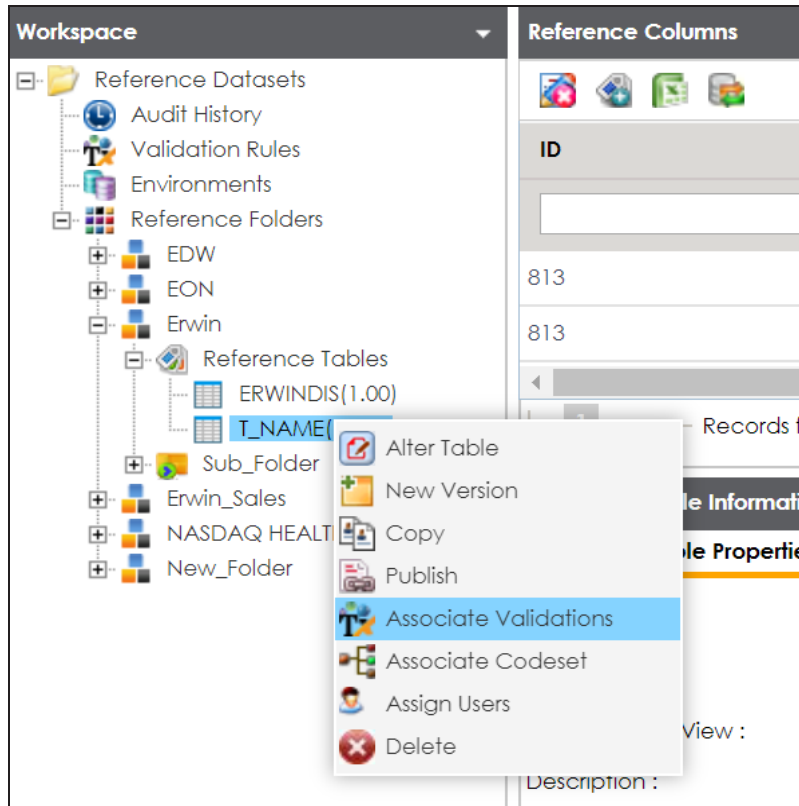
After creating a validation rule, you need to associate the validation rule with a reference table.

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.

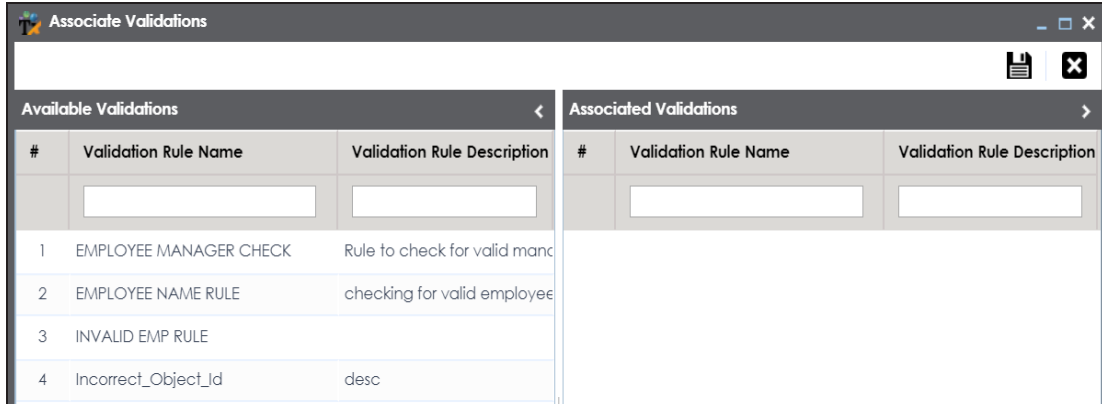
The available options appear.



2. Click **Associate Validations**.

The Associate Validation page appears.

Associating Validation Rules with Reference Tables

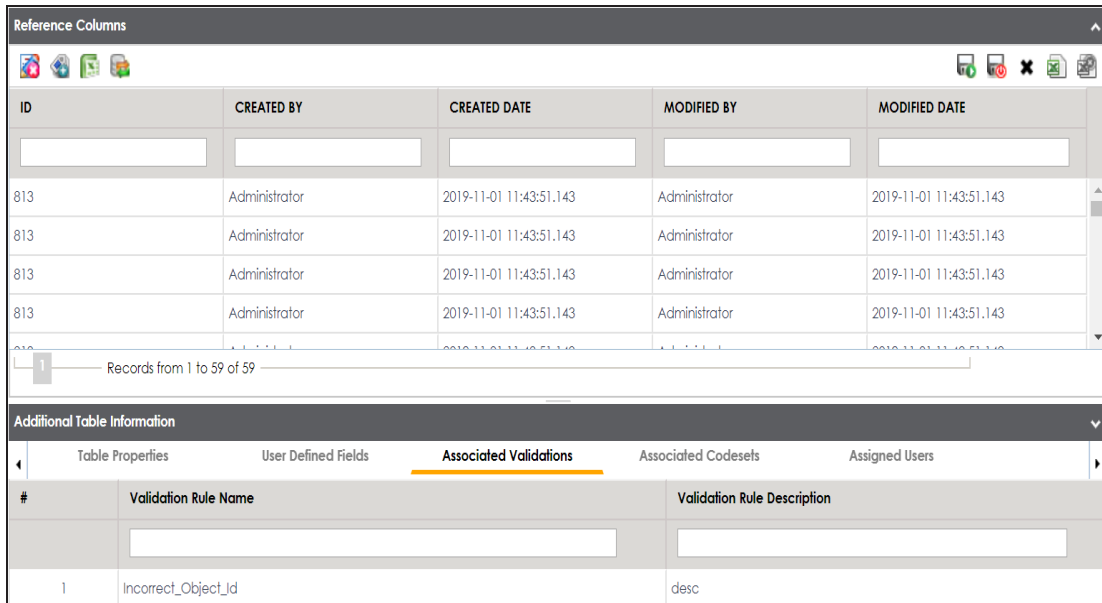


3. Drag and drop the required validation rule from the **Available Validation** pane to the **Associated Validation** pane.

For more information on adding validation rules, refer to the [Adding Validation Rules](#) topic.

4. Click .

The associated validation rules appear on the Associated Validations tab.




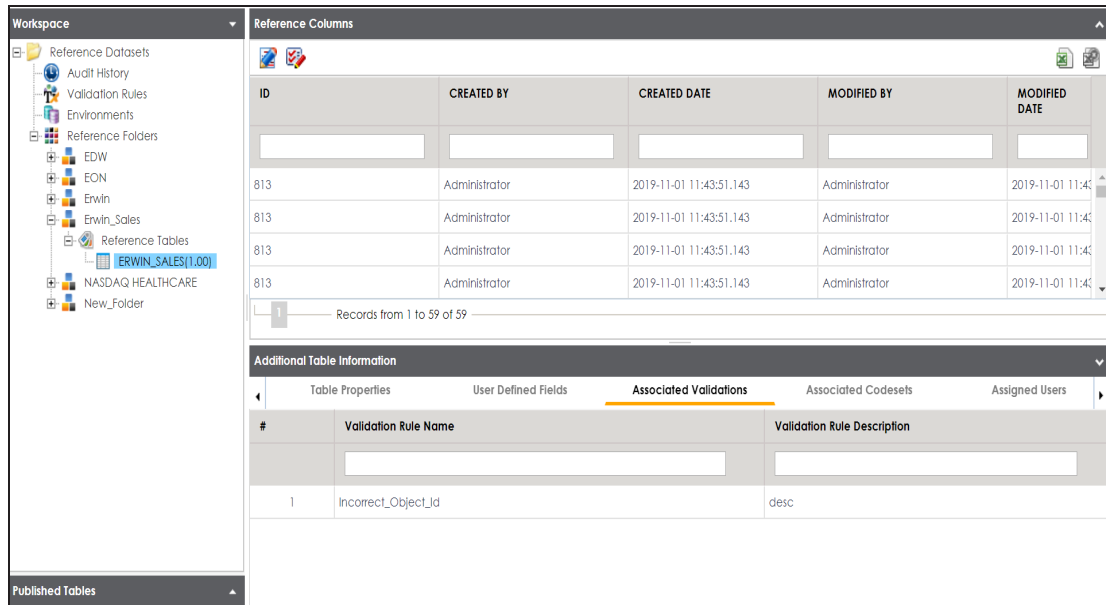
Running Validations Against Reference Tables

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.

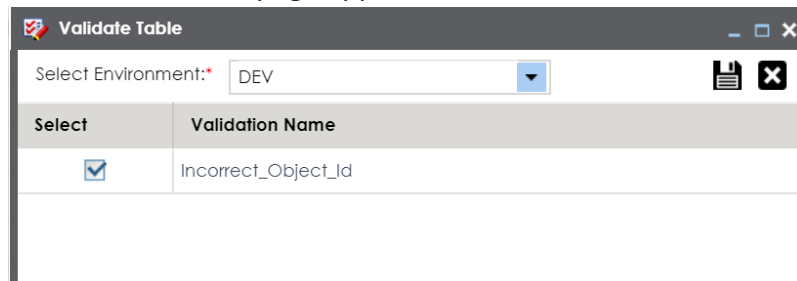


ID	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143

#	Validation Rule Name	Validation Rule Description
1	Incorrect_Object_Id	desc

2. Click .

The Validate Table page appears.



Select	Validation Name
<input checked="" type="checkbox"/>	Incorrect_Object_Id

Running Validations Against Reference Tables

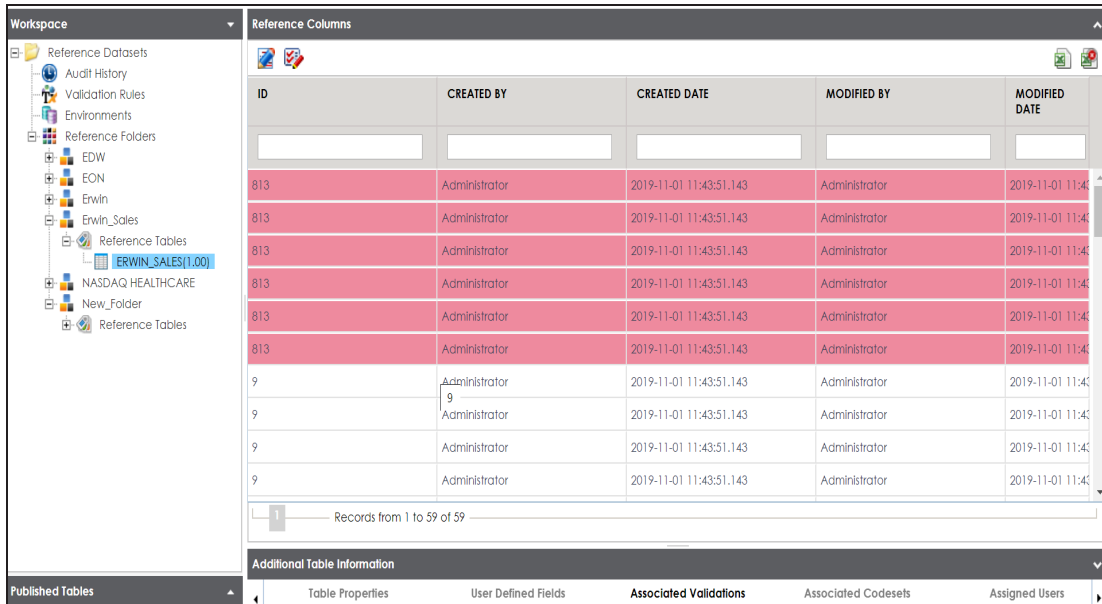
3. Select an environment and a validation rule.

For more information on creating environments, refer to the [Creating Publish Environments](#) topic.

4. Click .

Validation is successfully executed.

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



ID	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
813	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143
9	Administrator	2019-11-01 11:43:51.143	Administrator	2019-11-01 11:43:51.143

Records from 1 to 59 of 59

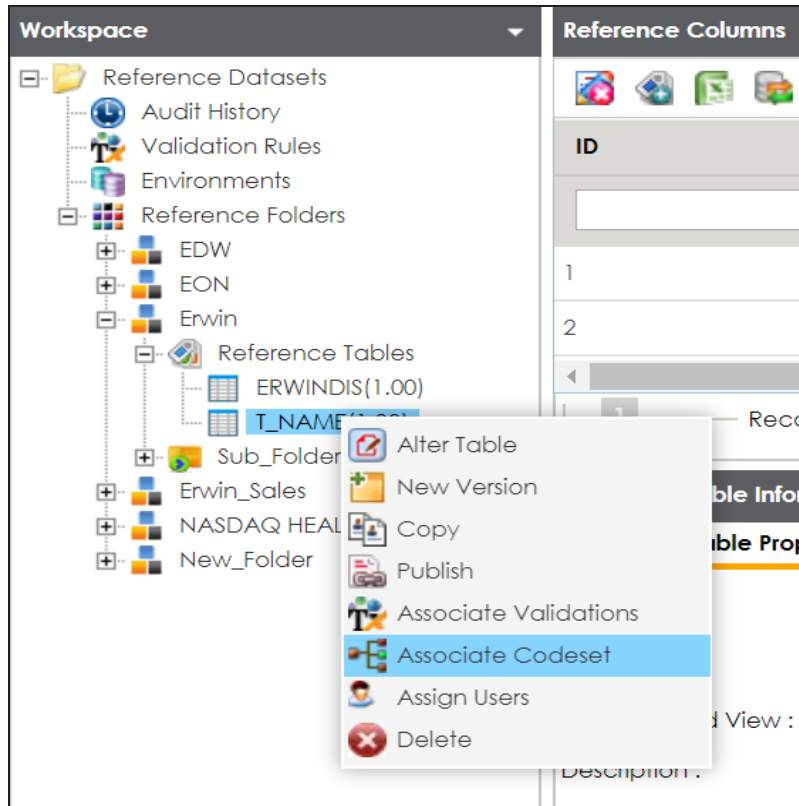
Associating Codesets With Reference Tables

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.

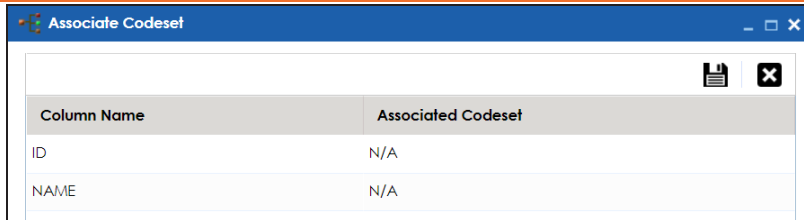
The available options appear.



3. Click **Associate Codesets**.

The Associate Codeset page appears.

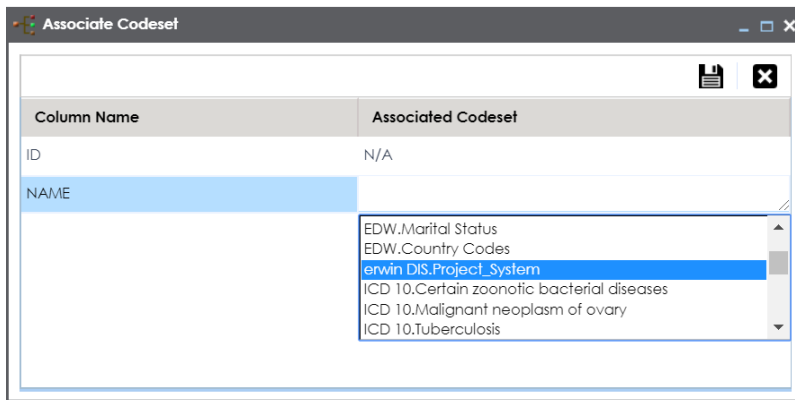
Associating Codesets With Reference Tables



Column Name	Associated Codeset
ID	N/A
NAME	N/A

4. Double-click the cell for the required column and select an appropriate codeset.

For more information on codesets, refer to the [Maintaining Enterprise Codesets](#) section.

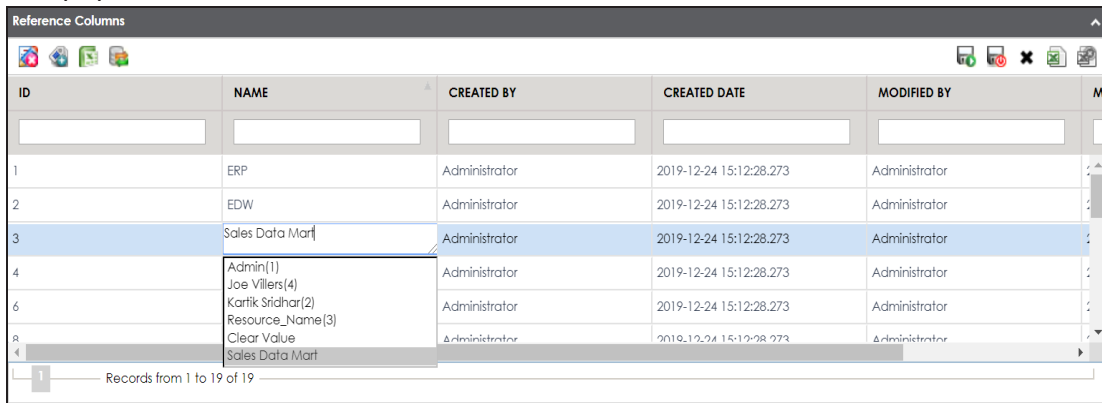


Column Name	Associated Codeset
ID	N/A
NAME	<ul style="list-style-type: none">EDW.Marital StatusEDW.Country Codeserwin DIS.Project_SystemICD 10.Certain zoonotic bacterial diseasesICD 10.Malignant neoplasm of ovaryICD 10.Tuberculosis

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.





ID	NAME	CREATED BY	CREATED DATE	MODIFIED BY	MC
1	ERP	Administrator	2019-12-24 15:12:28.273	Administrator	
2	EDW	Administrator	2019-12-24 15:12:28.273	Administrator	
3	Sales Data Mart	Administrator	2019-12-24 15:12:28.273	Administrator	
4	Admin(1)	Administrator	2019-12-24 15:12:28.273	Administrator	
	Joe Villers(4)				
6	Karlik Sridhar(2)	Administrator	2019-12-24 15:12:28.273	Administrator	
	Resource_Name(3)				
8	Clear Value	Administrator	2019-12-24 15:12:28.273	Administrator	
4	Sales Data Mart				

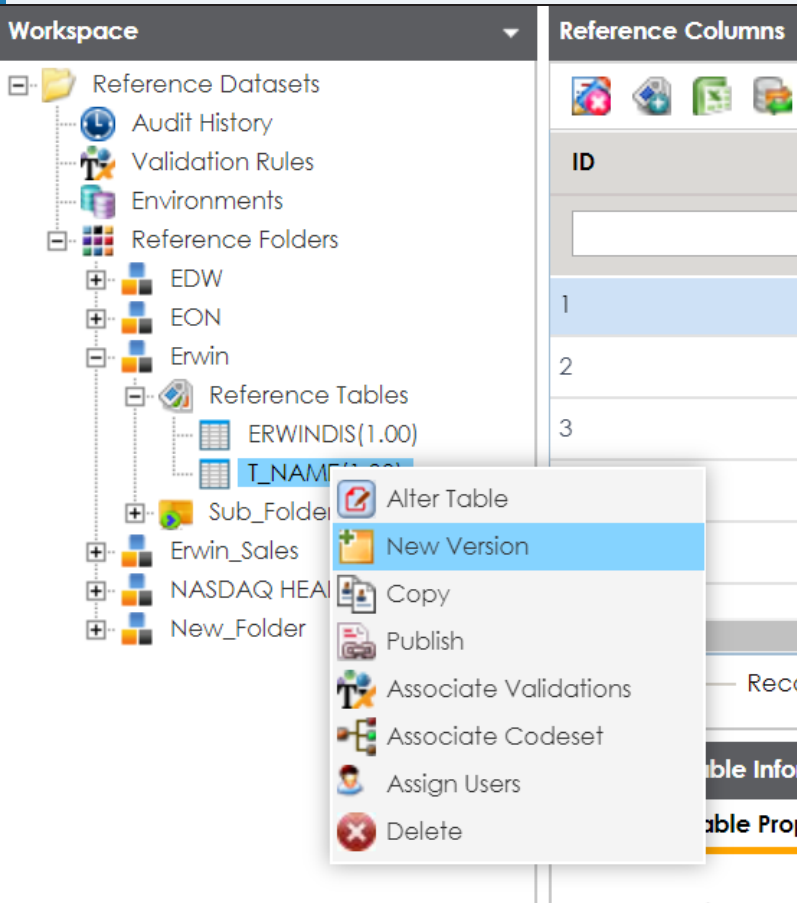
Versioning Reference Tables

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.

 Ensure that the reference table is not in edit mode (locked condition). If it is in edit mode, click  to cancel edit.



The screenshot displays the Reference Data Manager interface. On the left, the 'Workspace' pane shows a hierarchical tree view. Under the 'Reference Tables' folder, several tables are listed, including 'ERWINDIS(1.00)' and 'T_NAME'. A context menu is open over the 'Reference Tables' folder, with the 'New Version' option highlighted in blue. Other options in the menu include 'Alter Table', 'Copy', 'Publish', 'Associate Validations', 'Associate Codeset', 'Assign Users', and 'Delete'. On the right, the 'Reference Columns' pane shows a table with an 'ID' column and three rows containing the values 1, 2, and 3.

Versioning Reference Tables

3. Click **New Version**.

The New Version page appears.

The screenshot shows a web form titled "New Version". It contains the following fields:

- Table Name***: Input field containing "T_NAME".
- Version**: Input field containing "1.01".
- Description**: Text area containing "Reference Table for data integration project.".
- Version Label**: Empty input field.
- Changed Description***: Empty text area.

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

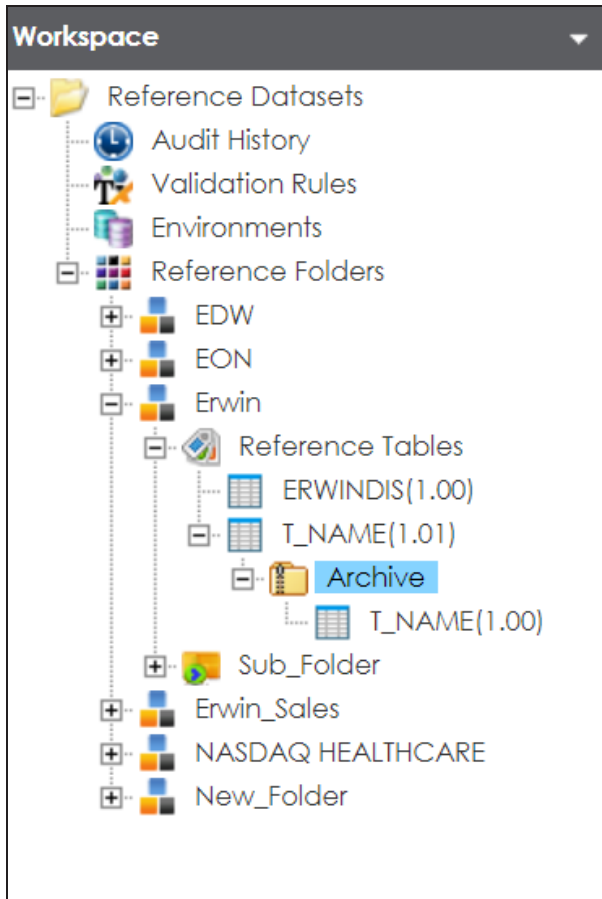
Field Name	Description
Table Name	Specifies the name of the reference table. For example, Data_Classifications_Levels.
Version	Specifies the new version of the reference table. For example, 1.02.
Description	Specifies the description about the reference table. For example: This reference table serves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

5. Click .

Versioning Reference Tables

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.

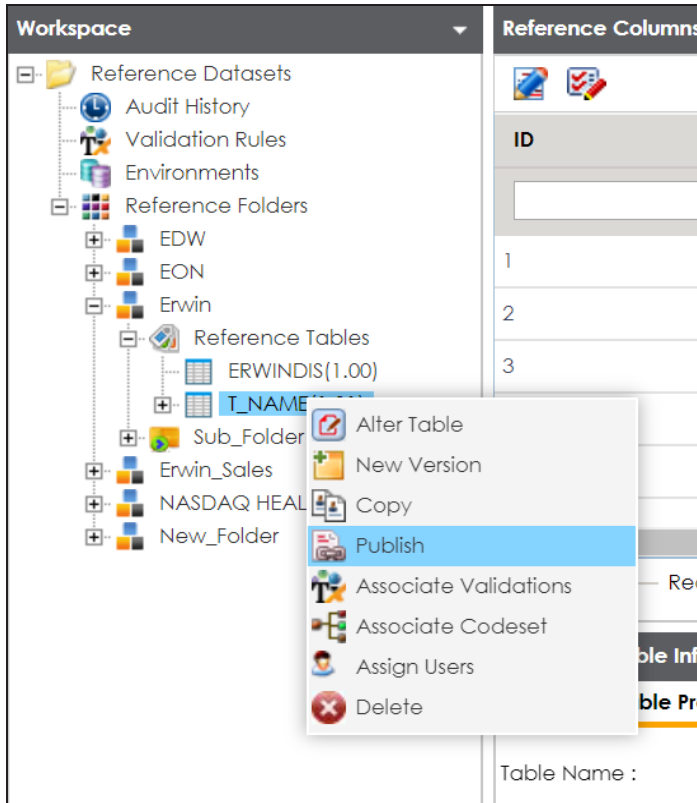


Publishing Reference Tables

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.



3. Click **Publish**.

A warning message appears.

4. Click **Yes**.

The Publish Table page appears.

Publishing Reference Tables

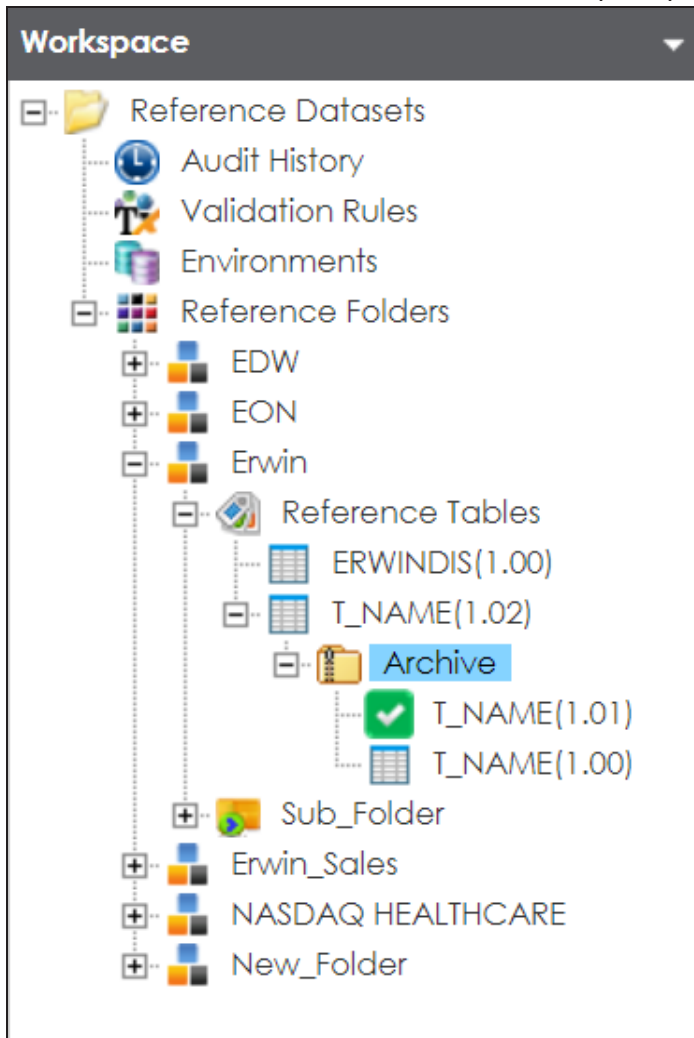
5. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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

6. Click .

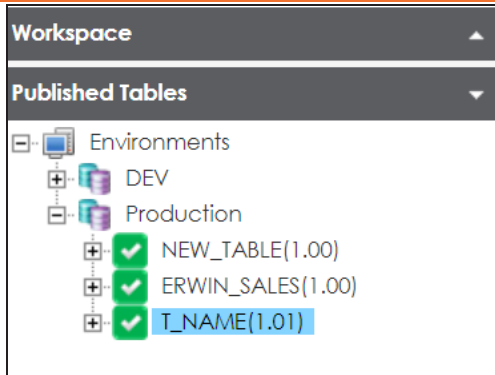
Publishing Reference Tables

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.

Publishing Reference Tables



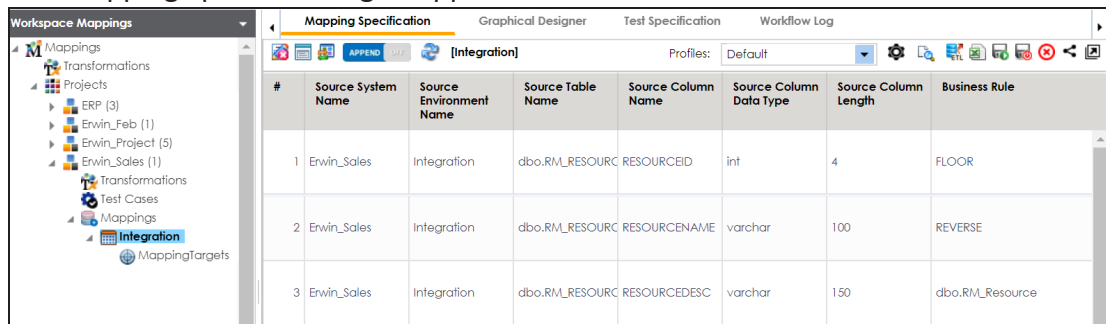
Associating Reference Tables with Mappings

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.

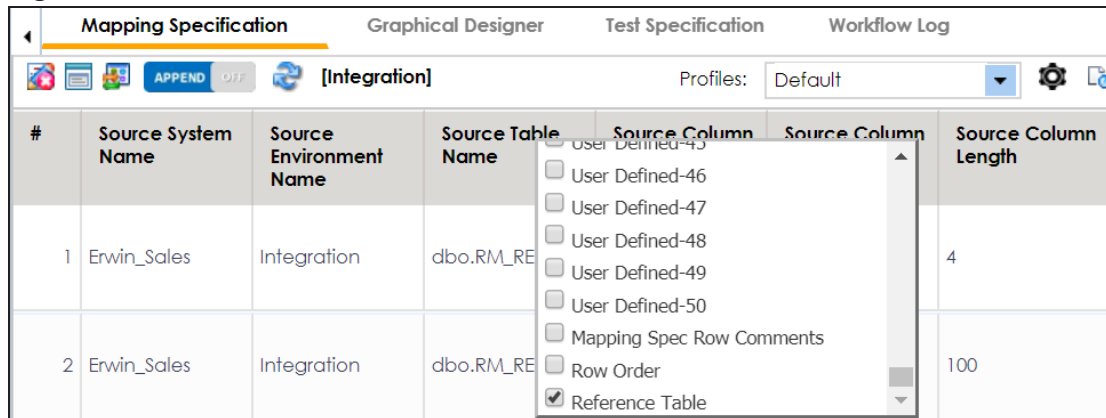
The Mapping Specification grid appears.



The screenshot shows the 'Mapping Specification' grid 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	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	dbo.RM_Resource

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



The screenshot shows the 'Mapping Specification' grid with a context menu open over the 'Source Table Name' header. The menu items are:


- User Defined-45
- User Defined-46
- User Defined-47
- User Defined-48
- User Defined-49
- User Defined-50
- Mapping Spec Row Comments
- Row Order
- Reference Table

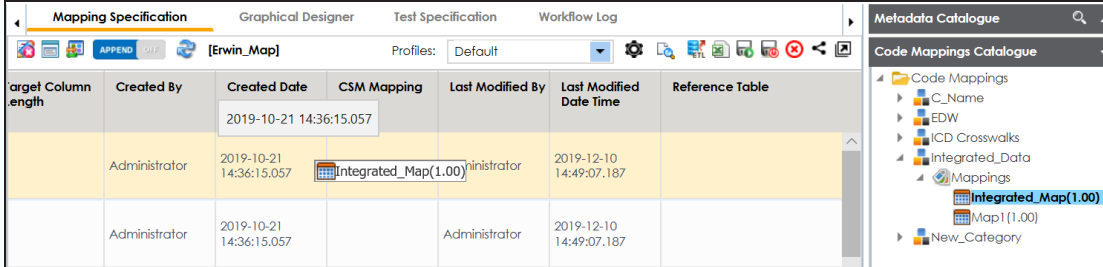
5. Select the **Reference Table** check box.

The Reference Table column appears in the Mapping Specification grid.

Associating Reference Tables with Mappings

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

 You can associate multiple source columns with the reference tables.



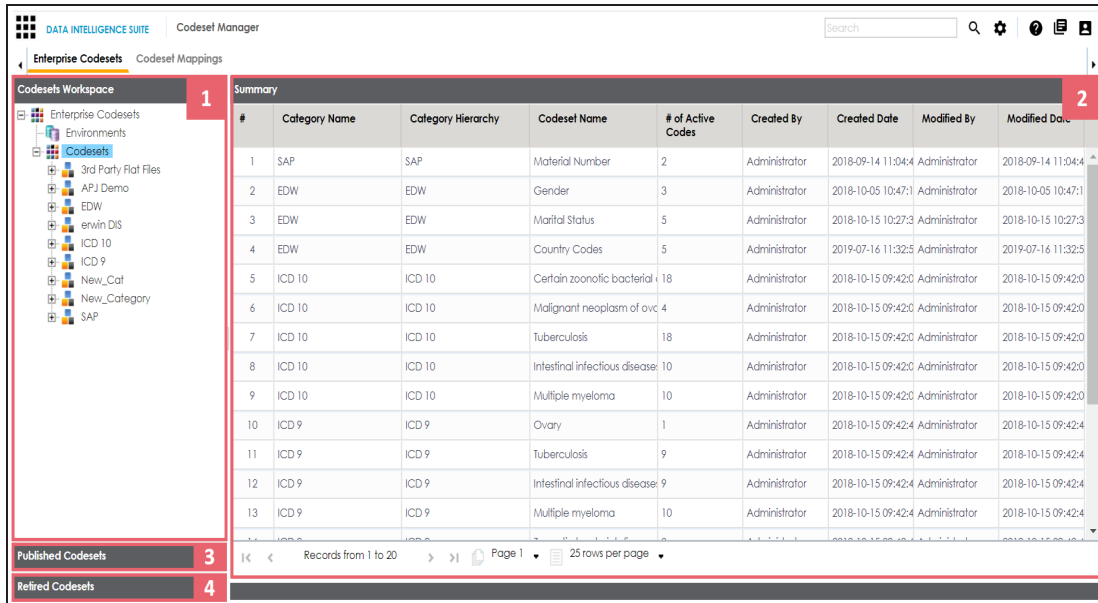
Target Column	Created By	Created Date	CSM Mapping	Last Modified By	Last Modified Date Time	Reference Table
length	Administrator	2019-10-21 14:36:15.057	Integrated_Map(1.00)	Administrator	2019-12-10 14:49:07.187	
	Administrator	2019-10-21 14:36:15.057		Administrator	2019-12-10 14:49:07.187	

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:



UI Section	Function
1-Work-space	Use this pane to browse through Codesets Workspace and Code Mappings Workspace panes. Codesets Workspace enables you to create and categorize codesets. Code Mappings Workspace enables you to create and categorize code mappings.
2-Right Pane	Use this pane to work on the data based on your selection in the Workspace pane.
3-Published Codesets	Use this pane to browse, view, and export published codesets.
4-Retired Codesets	Use this pane to browse, view, and export retired codesets.

Managing codesets involves the following:

Using Codeset Manager

- [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:

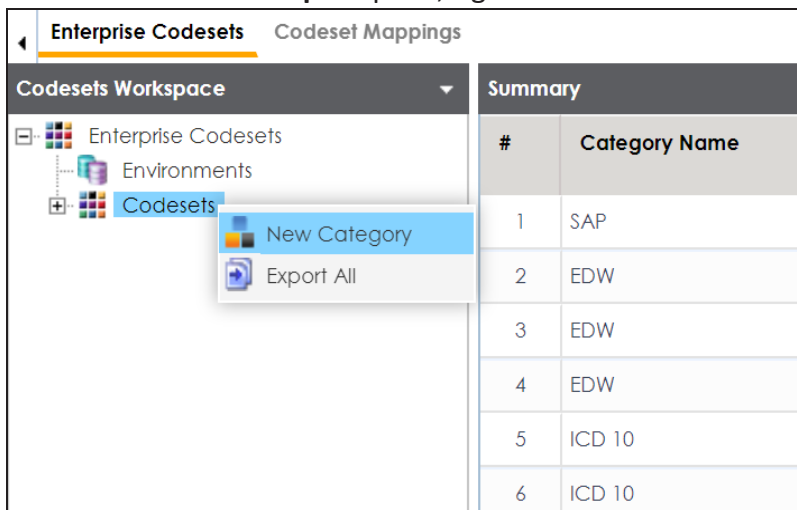
- [Creating categories](#)
- [Adding codesets](#)
- [Versioning codesets](#)
- [Deleting codes and codesets](#)
- [Publishing codesets](#)

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.



3. Click **New Category**.

The New Category page appears.

Category Name*

Category Description

4. Enter the **Category Name** and **Category Description**.

Creating Categories

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. [Managing categories](#) involves:

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

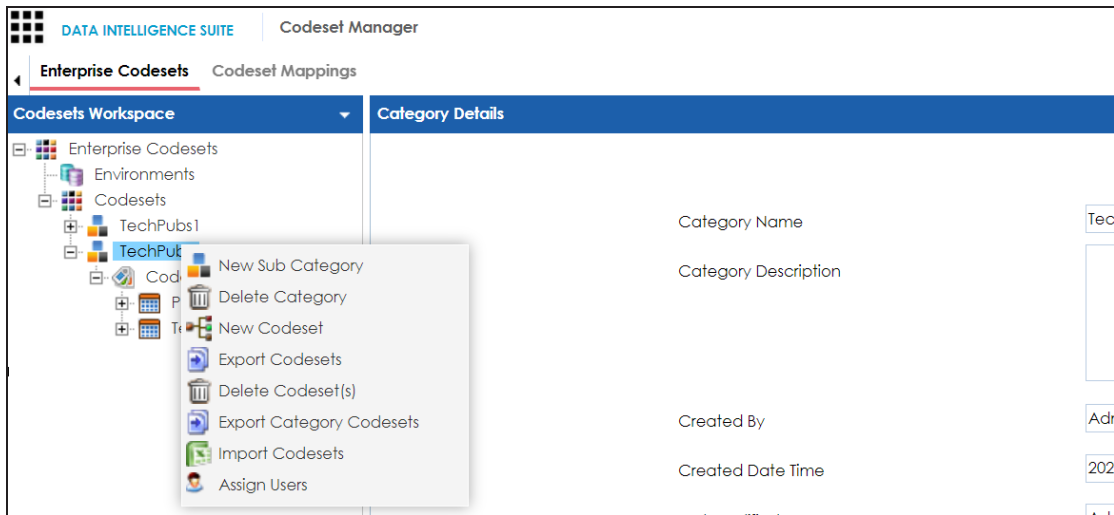
Managing Categories

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.



2. Use the following options:

New Sub Category

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

Managing Categories

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

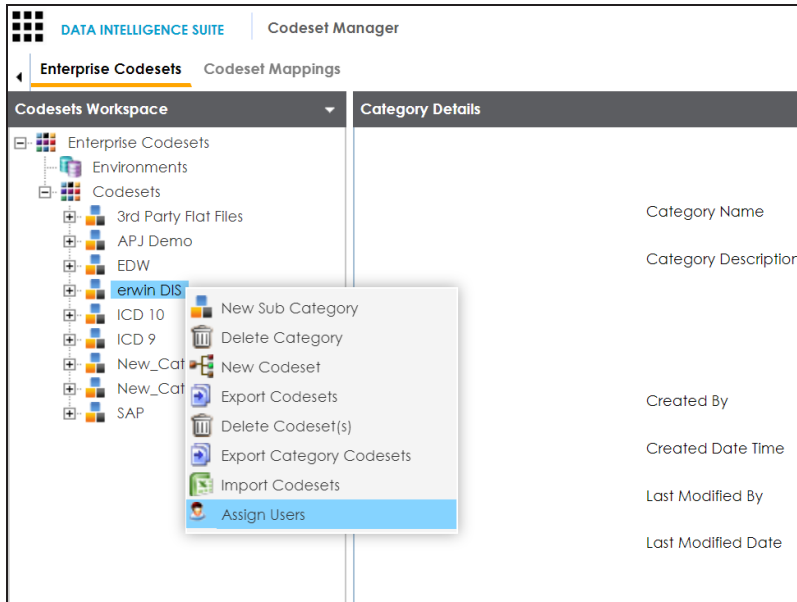
Use this option to assign users to a category based on your organization's projects, departments, functions, and so on. On the Assign/Unassign Users page, select or remove users and click . For more information on assigning users, refer to [Assigning Users](#) topic.

Assigning Users

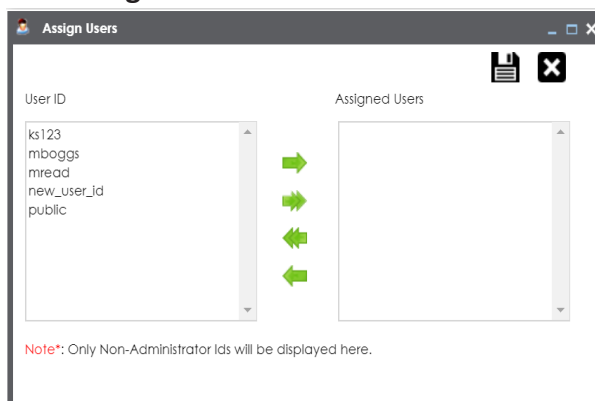
You can assign users to a category and enable write access to all sub-folders and codesets within the category.

To assign users, follow these steps:

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



2. Click **Assign Users**.



3. 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.

Assigning Users

4. Click .

The users are assigned to the category.



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

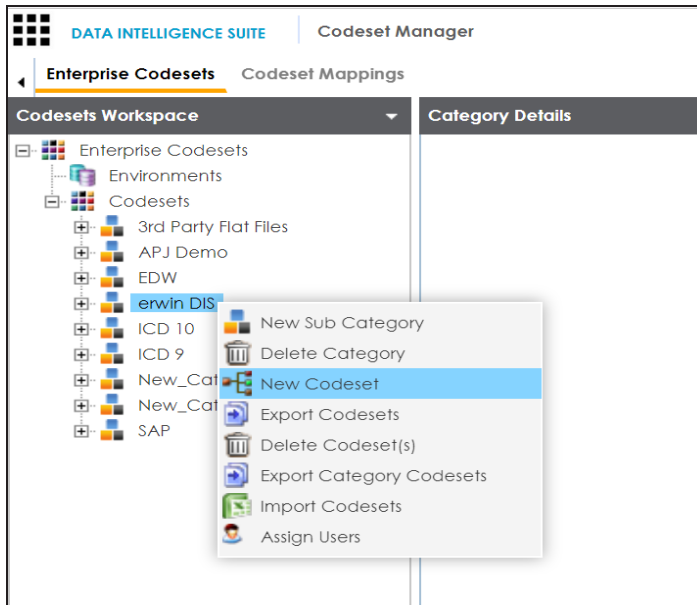
Adding Codesets

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

Codesets store codes in a code value grid.

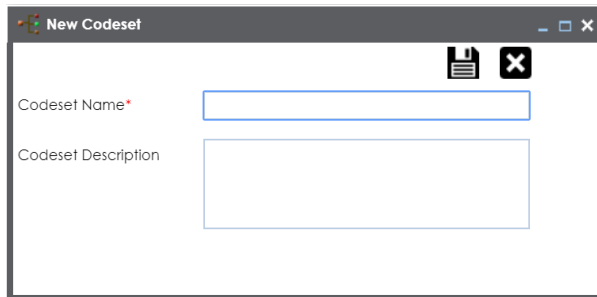
To add new codesets, follow these steps:

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



3. Click **New Codeset**.

The New Codeset page appears.



4. Enter **Codeset Name** and **Codeset Description**.

Adding Codesets

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](#)

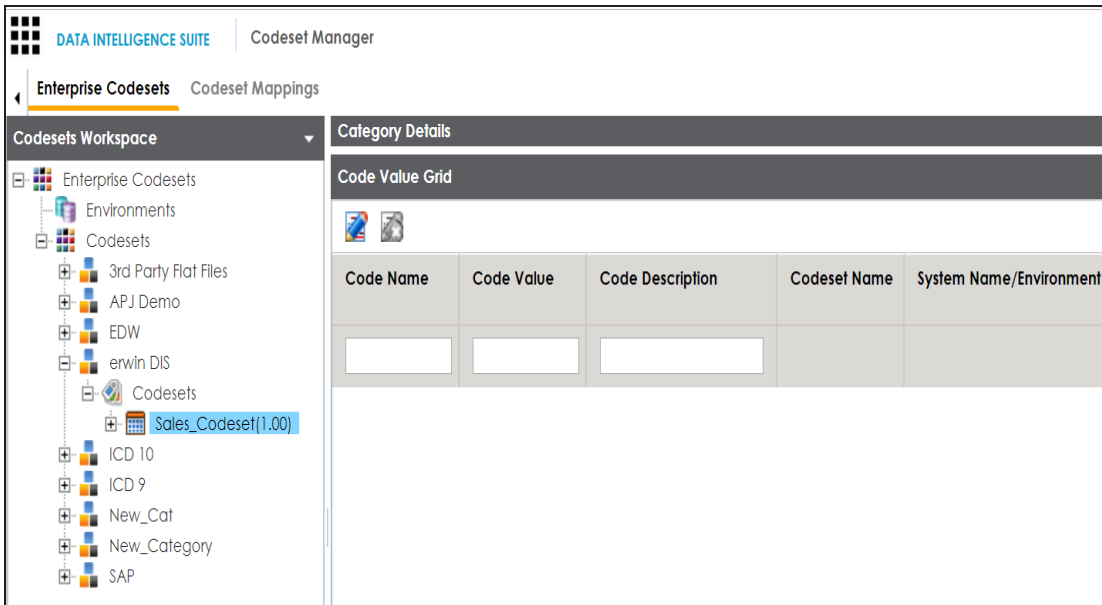
Entering Codes Manually

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.



3. Click .

4. Click .

The New Code page appears.


Entering Codes Manually

The screenshot shows a 'New Code' form with the following fields:


- Code Name* (text input)
- Code Value* (text input)
- Code Description (text area)
- System/Environment Name (dropdown menu with text 'Please select System/Environment')
- Start Date (date picker)
- End Date (date picker)
- Activate User Defined Fields (toggle switch, currently ON)
- User Defined Field 1 through 10 (text input boxes)

Note* : Date Format = MM/DD/YYYY

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

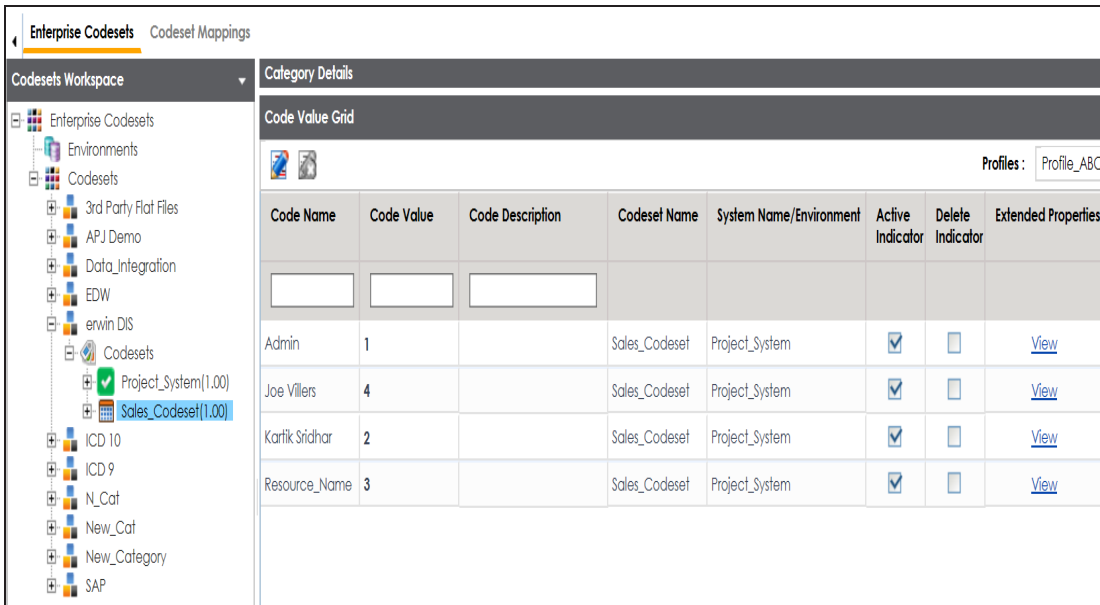
Field Name	Description
Code Name	Specifies the code name. For example, Admin.
Code Value	Specifies the code value of the code name. For example, 1.
Code Description	Specifies the description about the code. For example: The code value for Admin is 1.
System/Environment Name	Specifies the system and environment related with the code. For example, EDW.EDW-DEV. Select the System/Environment name.
Start Date	Specifies the start date of the code validity. 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.

Entering Codes Manually

Field Name	Description
	Enter the end date using  .
Activate User Defined Fields	Turn Activate User Defined Fields to ON to use the user defined fields in the Code Value Grid.
User Defined Field 1-10	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.

6. Click .

The codes are entered into the Code Value Grid.



The screenshot shows the 'Enterprise Codesets' application interface. On the left is a tree view of 'Codesets Workspace' with 'Sales_Codeset(1.00)' selected. The main area is titled 'Category Details' and contains a 'Code Value Grid'. The grid has the following data:


Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Extended Properties
Admin	1		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Joe Villers	4		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Kartik Sridhar	2		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Resource_Name	3		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View

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:

Entering Codes Manually

- 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  to download the template file.

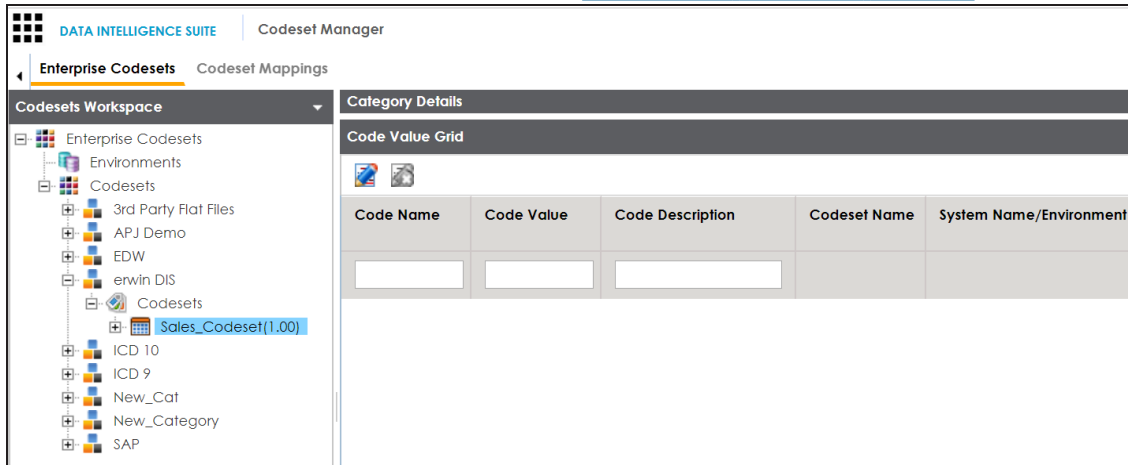
The template in .xlsx format is downloaded.

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.



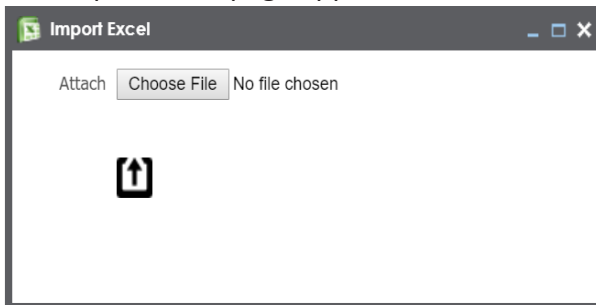
The screenshot shows the 'Codeset Manager' interface. On the left, the 'Codesets Workspace' pane displays a tree view of codesets, with 'Sales_Codeset(1.00)' selected. On the right, the 'Code Value Grid' pane shows a table with the following columns: Code Name, Code Value, Code Description, Codeset Name, and System Name/Environment. The table is currently empty.


4. Click  to enable the edit mode.

5. Click .

Importing Codes using MS Excel Files

The Import Excel page appears.



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

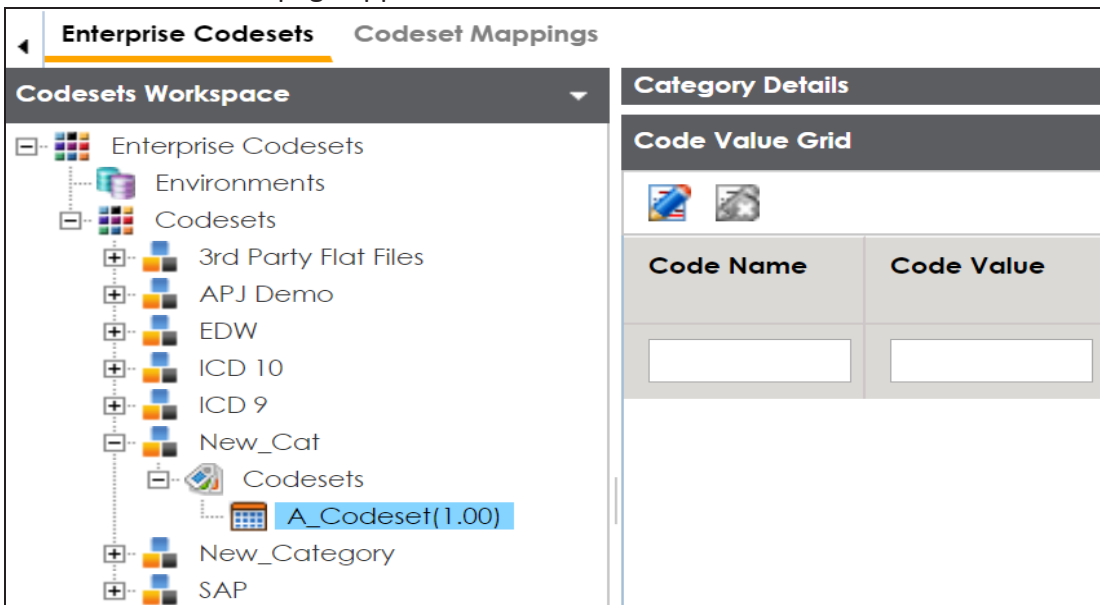
Importing Codes into Code Value Grid using DB Scan


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. 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.

The Code Value Grid page appears.

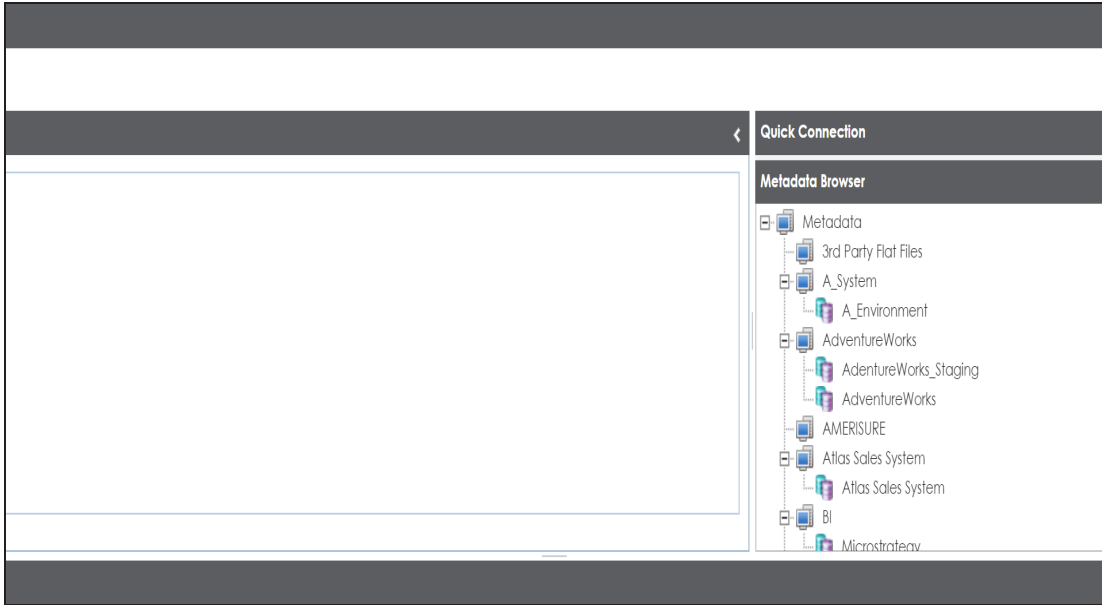


2. Click  , to enable edit mode.

3. Click  .

The Following page appears.

Importing Codes into Code Value Grid using DB Scan



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

A screenshot of the 'Quick Connection' pane. It has a dark header with the text 'Quick Connection'. Below the header, there is a red asterisk followed by the text '*Mandatory Fields'. To the right of this text is a blue icon with the word 'TEST' below it. Below this are six input fields, each with a label to its left: 'DBType: *' with a dropdown menu showing 'Select DB Type'; 'Driver Name:' with a text box; 'IP Address/Host Name: *' with a text box; 'Port: *' with a text box; 'Database Name: *' with a text box; and 'System Name: *' with a text box.




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.

Importing Codes into Code Value Grid using DB Scan

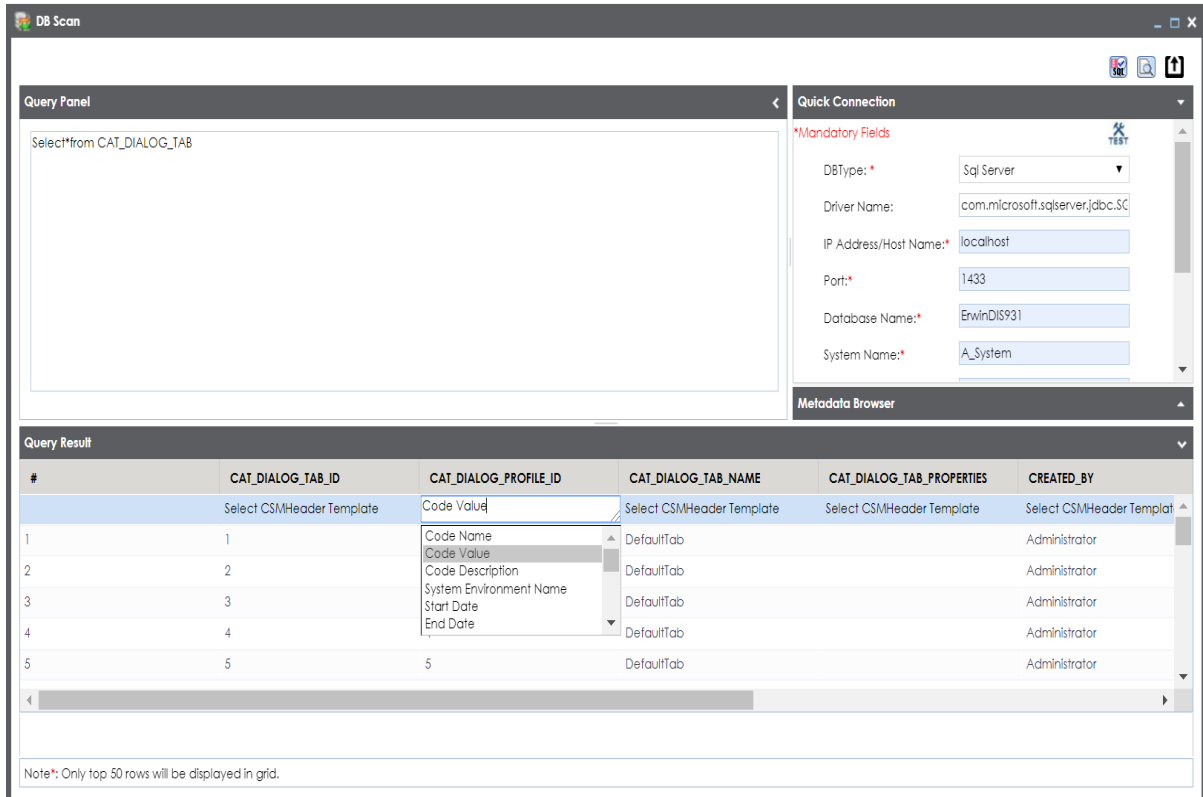
Field Name	Description
DBType	Specifies the database type. For example, Sql Server. Select the database type from which you wish to scan codes.
Driver Name	Specifies the JDBC driver name for connecting to the database. For example, com.microsoft.sqlserver.jdbc.SQLServerDriver It is autopopulated depending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

Importing Codes into Code Value Grid using DB Scan

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

- Click  to test the connection.
On a successful connection, Connection Successful pop-up appears.
- Write an SQL query in the **Query Panel** to fetch the required data from the database.
- Click  to validate the query.
- Click  to preview the data.
- Double-click the **Select CSMHeader Template** cell of the required column.

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



The screenshot shows the DB Scan application interface. The Query Panel contains the query: `Select*from CAT_DIALOG_TAB`. The Quick Connection panel shows the following settings:

- DBType: * Sql Server
- Driver Name: com.microsoft.sqlserver.jdbc.S
- IP Address/Host Name: * localhost
- Port: * 1433
- Database Name: * ErwinDIS931
- System Name: * A_System

The Query Result grid displays the following data:

#	CAT_DIALOG_TAB_ID	CAT_DIALOG_PROFILE_ID	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROPERTIES	CREATED_BY
	Select CSMHeader Template	Code Value	Select CSMHeader Template	Select CSMHeader Template	Select CSMHeader Templat
1	1	Code Name	DefaultTab		Administrator
2	2	Code Value	DefaultTab		Administrator
3	3	Code Description	DefaultTab		Administrator
4	4	System Environment Name	DefaultTab		Administrator
5	5	Start Date	DefaultTab		Administrator
		End Date	DefaultTab		Administrator


Note: Only top 50 rows will be displayed in grid.

Importing Codes into Code Value Grid using DB Scan

11. Select the required Code Value Grid column.



You can select multiple columns from the database.

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

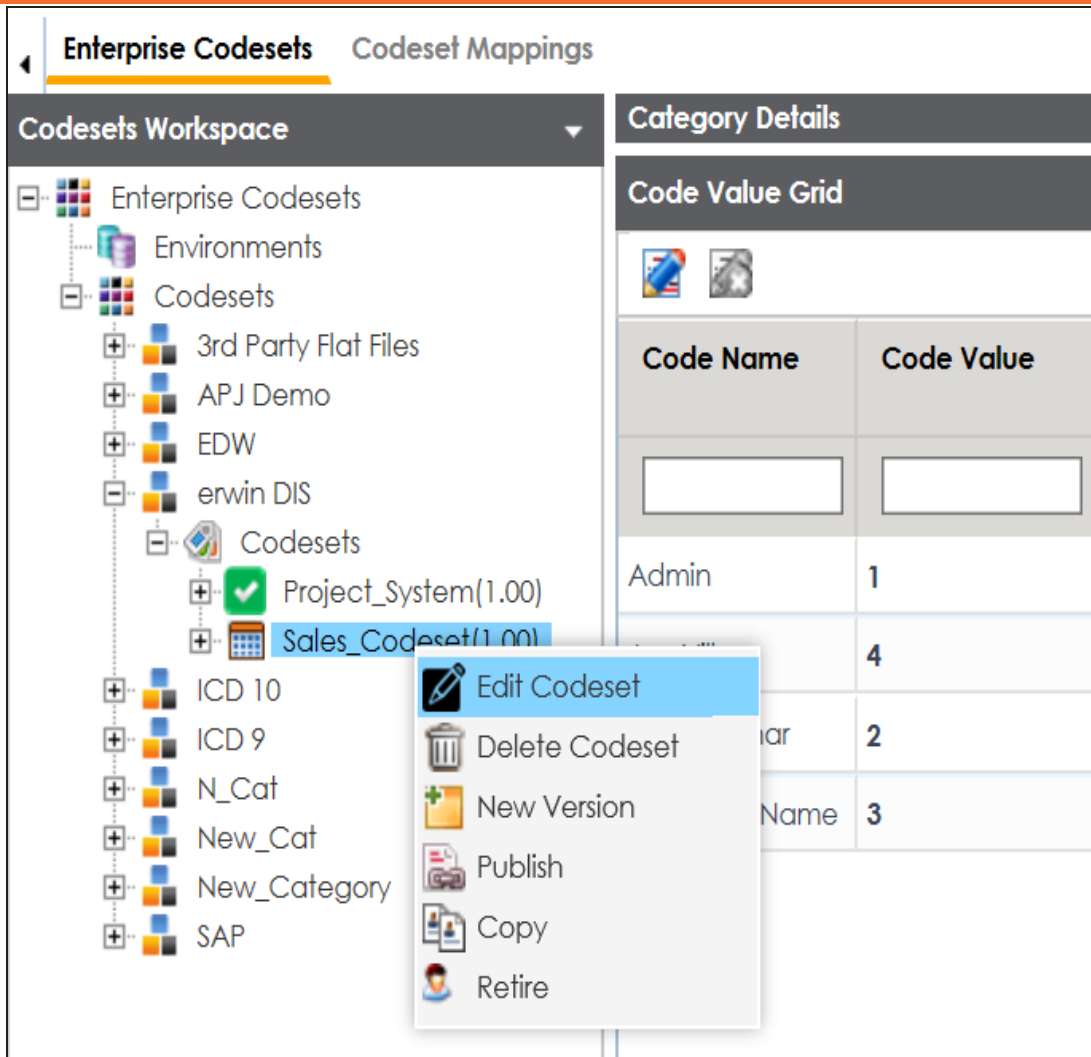
Managing Codesets involves the following:

- 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.



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 [Versioning Codesets](#) topic.

Managing Codesets

Publish

Use this option to publish the codesets. For more information on publishing codesets, refer to [Publishing Codesets](#) topic.

Copy

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

Retire



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

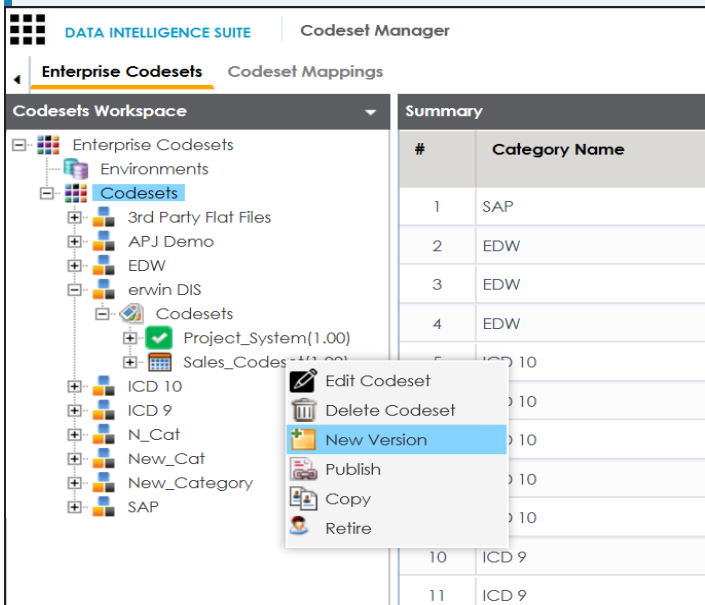
Versioning Codesets

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.

 Ensure the codeset is in edit mode. Click  to cancel edit mode.



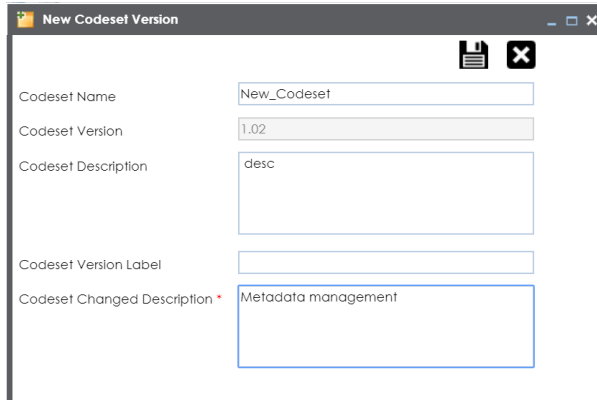
The screenshot shows the 'Codeset Manager' interface. On the left, the 'Codesets Workspace' pane displays a tree view of codesets, including 'Enterprise Codesets', 'Environments', and 'Codesets'. A right-click context menu is open over the 'New Version' option. The main pane shows a 'Summary' table with columns for '#', 'Category Name', and 'Version'.

#	Category Name	Version
1	SAP	1.0
2	EDW	1.0
3	EDW	1.0
4	EDW	1.0
5	ICD 10	1.0
6	ICD 10	1.0
7	ICD 10	1.0
8	ICD 10	1.0
9	ICD 9	1.0
10	ICD 9	1.0
11	ICD 9	1.0

3. Click **New Version**.

The New Codeset Version page appears.

Versioning Codesets



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 whose version is being created. 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.
Codeset Description	Specifies the description about the codeset. For example: This codeset has code names and code values 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 Description	Specifies the description about the changes in the codeset. 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

The screenshot shows the 'Codeset Manager' interface. On the left is the 'Codesets Workspace' tree view with a search bar. The main area is titled 'Category Details' and contains a 'Code Value Grid'. The grid has columns for Code Name, Code Value, Code Description, Codeset Name, System Name/Environment, Active Indicator, Delete Indicator, and Extended Properties. The 'Delete Indicator' column contains checkboxes for each row.

Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Delete Indicator	Extended Properties
Admin	1		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Joe Villers	4		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Kartik Sridhar	2		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Resource_Name	3		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View

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

A warning message appears.

5. Click **Yes**.

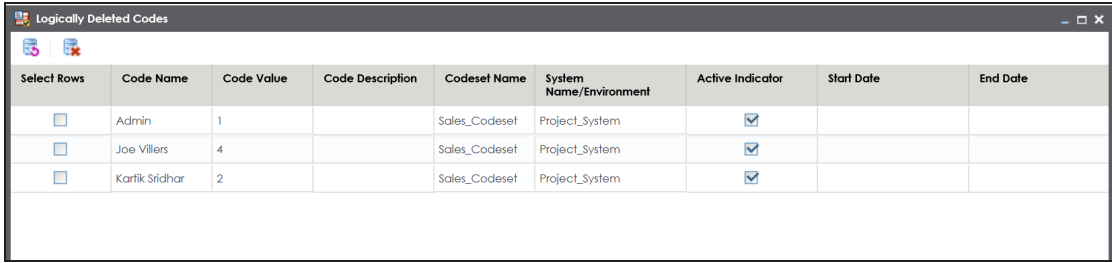
The code is logically deleted and can be restored or purged.

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



1. Click .

The Logically Deleted Codes page appears.

Deleting Codes and Codesets

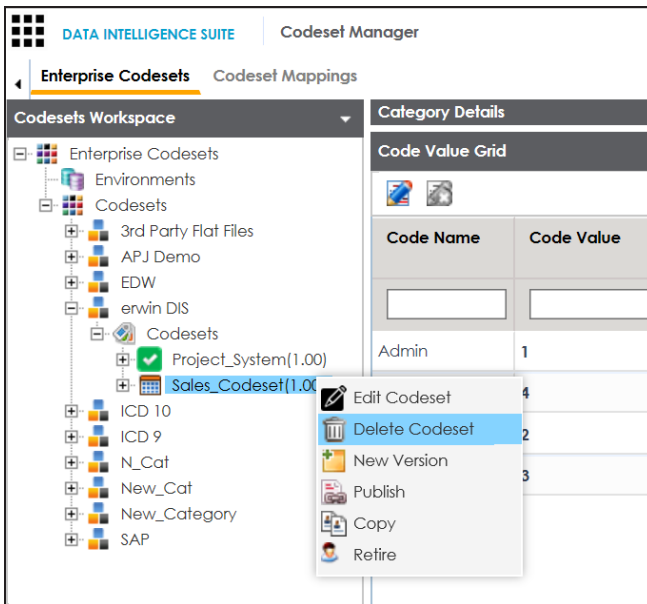



Select Rows	Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Start Date	End Date
<input type="checkbox"/>	Admin	1		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Joe Villers	4		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Kartik Sridhar	2		Sales_Codeset	Project_System	<input checked="" type="checkbox"/>		

2. Select required rows.
3. Click , to delete the selected rows.
4. Click , to restore the selected rows.

To permanently delete codesets, follow these steps:

1. Right-click a codeset.



To delete a codeset, ensure the codeset is in edit mode. Click  to cancel edit mode.

2. Click **Delete Codesets**.

A warning message appears.

Deleting Codes and Codesets

3. Click **Yes**.

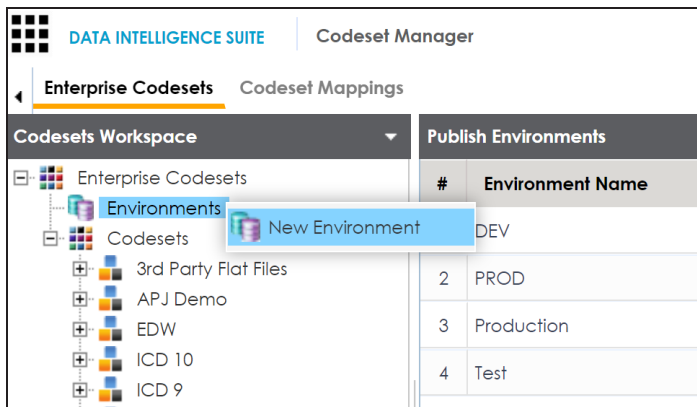
The codeset is deleted.

Publishing Codesets

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

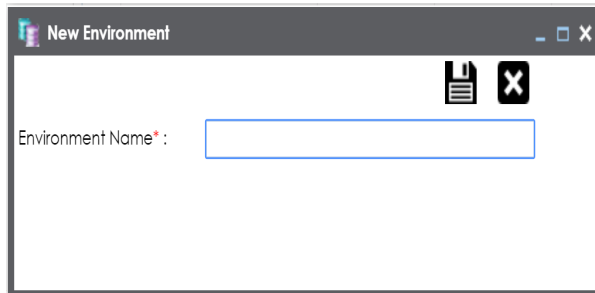
To create publish environments, follow these steps:

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.



4. Enter **Environment Name**.

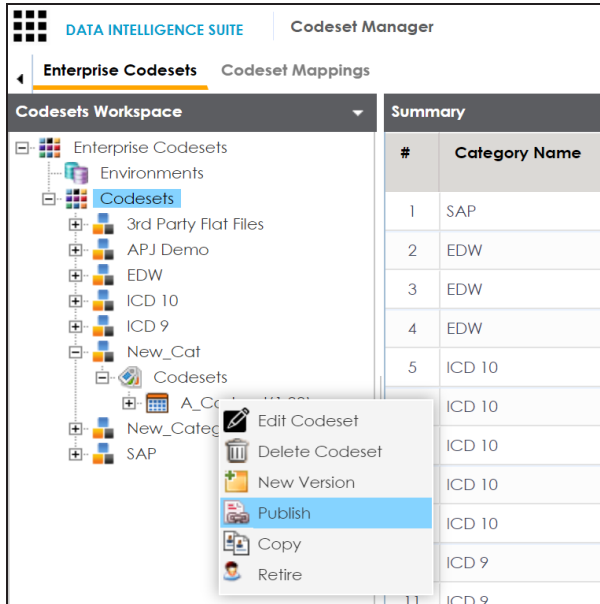
5. Click .

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

Publishing Codesets

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.

Publishing Codesets

* Publishing the Codeset will create a new version.

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.

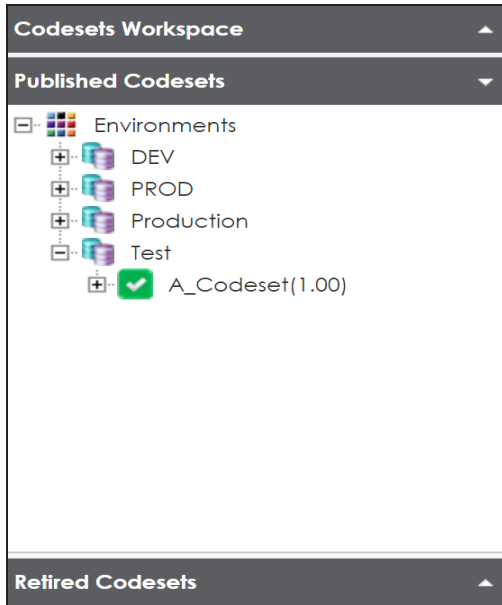
Field Name	Description
Codeset Name	Specifies the name of the codeset which is being published. For example, Country Codes. It autopopulates with the codeset name and cannot be edited.
Codeset Version	Specifies the new version of the codeset. For example, 1.03. It autopopulates with the new version and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

Publishing Codesets

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:

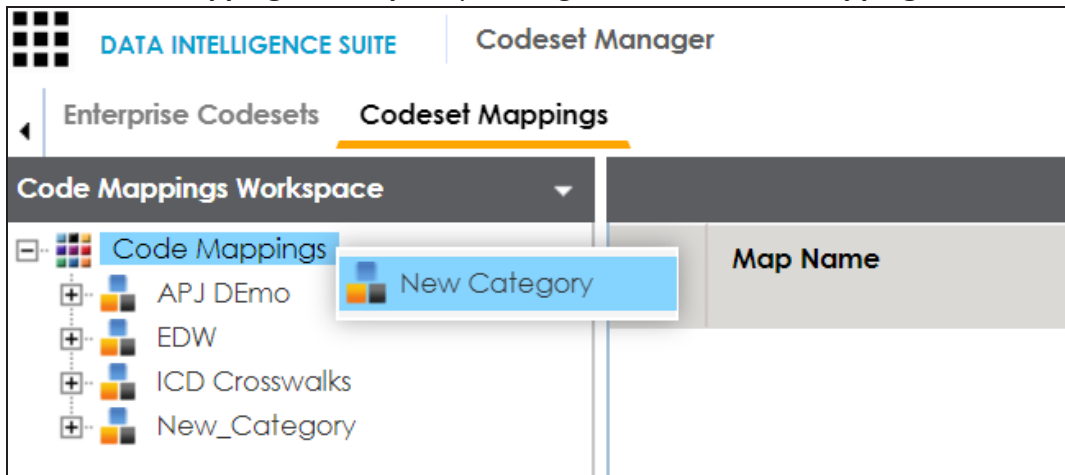
- [Creating Categories](#)
- [Creating code maps](#)
- [Versioning codemaps](#)
- [Publishing and association codemaps](#)

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.

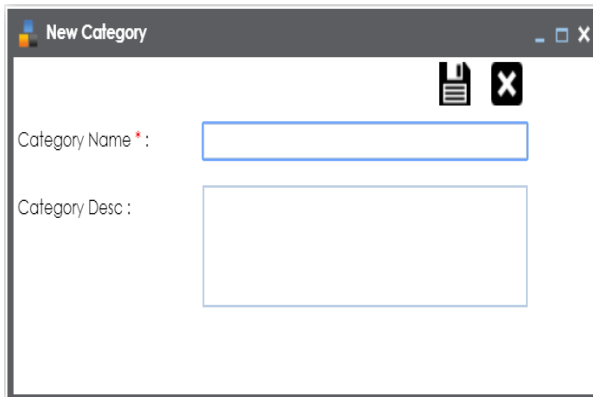
To create a category, follow these steps:

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.

A screenshot of a 'New Category' dialog box. The title bar says 'New Category'. There are two input fields: 'Category Name *:' with a text box, and 'Category Desc:' with a larger text area. There are also icons for a document and a close button (X) in the top right corner.

4. Enter **Category Name** and **Category Description**.

For example:

Creating Categories

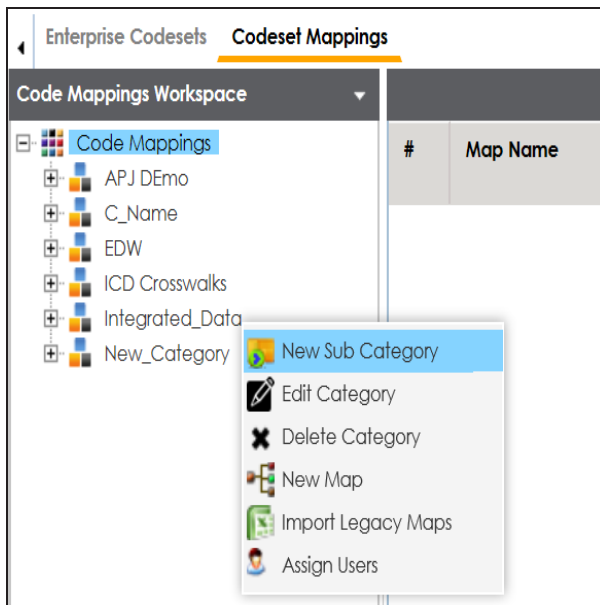
- **Category Name:** EDW
- **Category Description:** This category contains two code mappings, Gender Crosswalk and Marital Status Crosswalk.

5. Click .

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

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

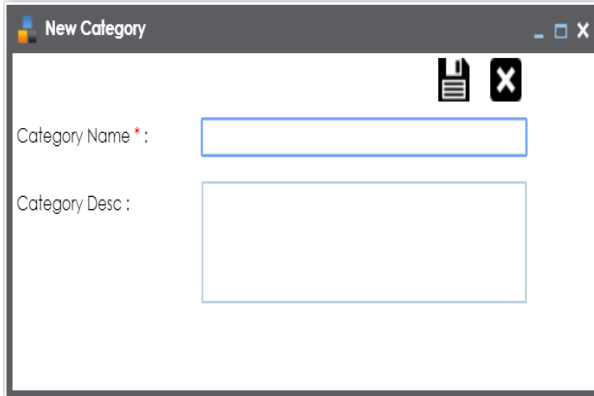
1. Under the **Code Mappings Workspace** pane, right-click the required category.



2. Click **New Sub Category**.

The New Category page appears.

Creating Categories



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. [Managing categories](#) involves:

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

Managing Categories

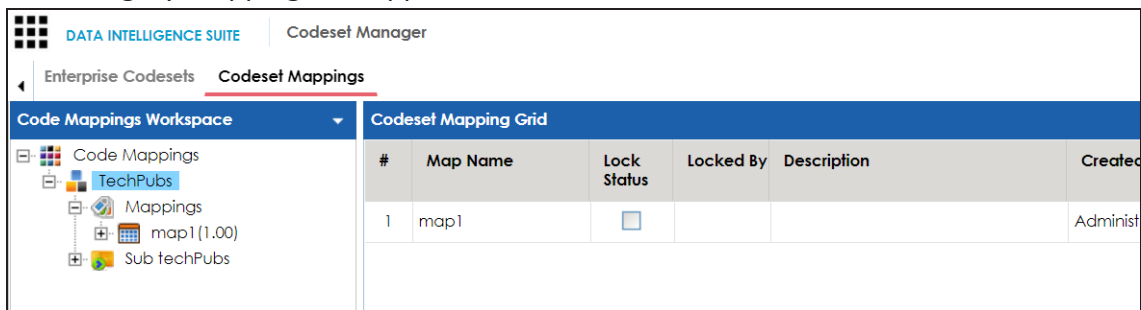
Managing categories involves:

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

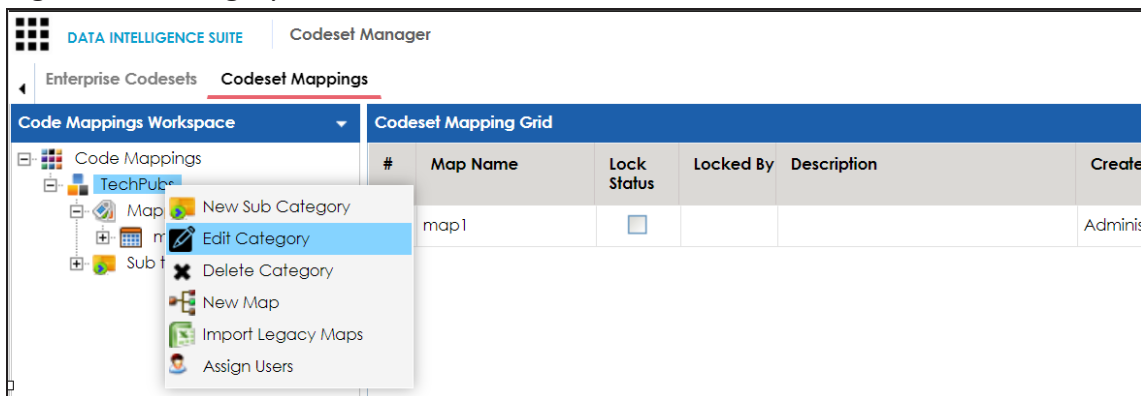
To manage categories, follow these steps:

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

The Category Mapping Grid appears.



2. Right-click a category.



3. Use the following options:

Edit Category

Managing Categories

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 Code-set Manager. These codesets can have the same or different code values. Using the Auto-Map functionality, you can map source and target codesets with:

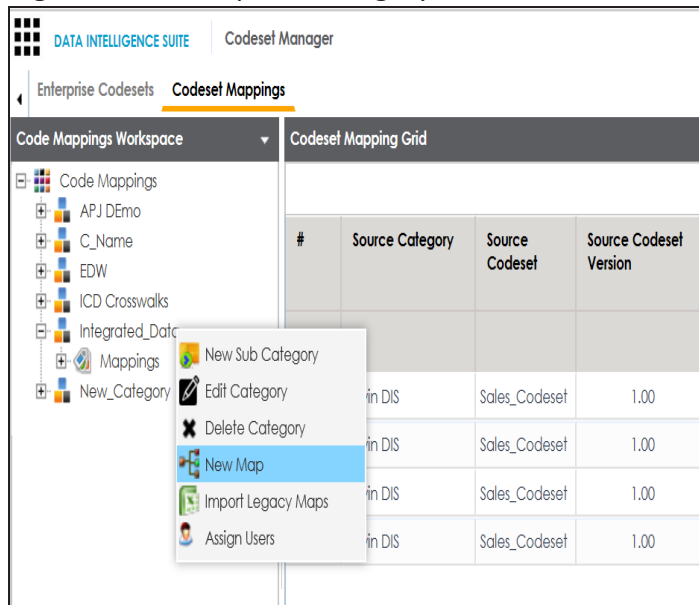
- Same code values
- Different code values

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:

1. Right-click the required category.



2. Click **New Map**.

Creating Code Crosswalks (Mappings)

The New Codeset Map page appears.

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.

Creating Code Crosswalks (Mappings)

The screenshot displays the 'Codeset Manager' application. The main window is titled 'Codeset Mappings' and contains a 'Code Mappings Workspace' on the left, a 'Codeset Mapping Grid' in the center, and a 'Codeset Tree' on the right. The 'Code Mappings Workspace' shows a tree view with 'Integrated_Map(1.00)' selected. The 'Codeset Mapping Grid' is a table with the following data:

#	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID
1	erwin DIS	Sales_Codeset	1.00	Project_System		710
2	erwin DIS	Sales_Codeset	1.00	Project_System		711
3	erwin DIS	Sales_Codeset	1.00	Project_System		712
4	erwin DIS	Sales_Codeset	1.00	Project_System		713

Below the grid is a 'CSM MapSpec Overview' section with the following fields:

- Codeset Map Name:
- Codeset Map Version:

The 'Codeset Tree' on the right shows a hierarchy of codesets, including 'erwin DIS', 'Sales_Codeset', and 'Project_System'.

6. Click  to validate the code mapping.

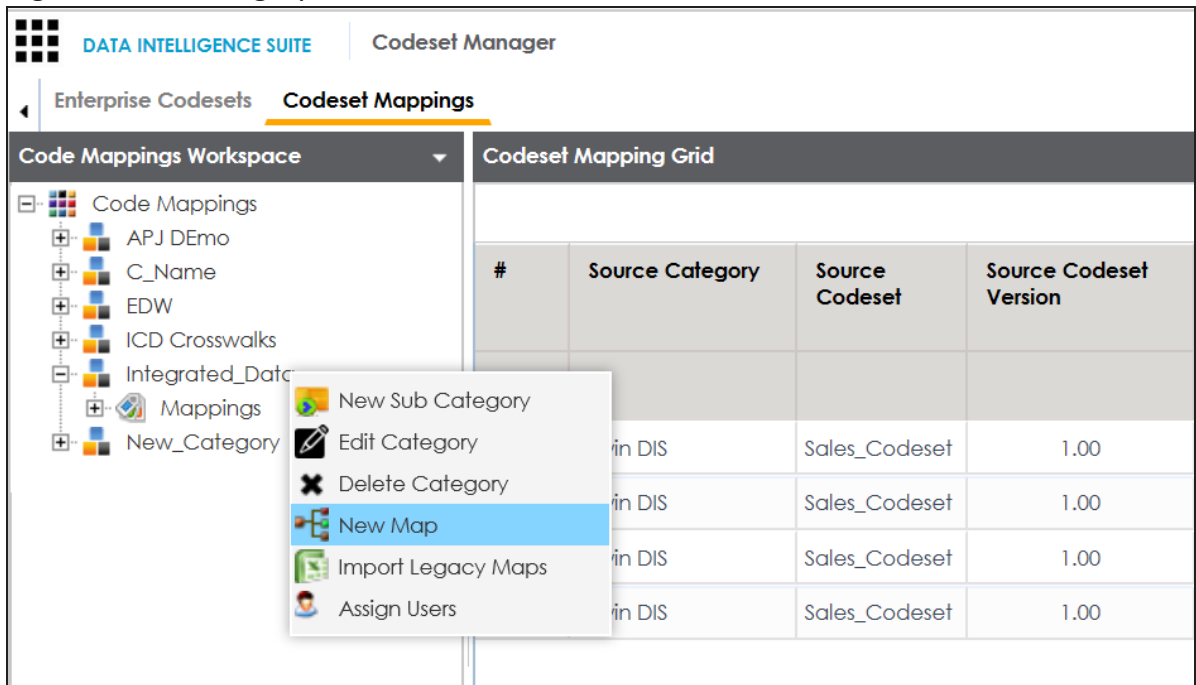
Creating Code Crosswalks - Source and Target Codesets with Different Code Value

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:

Creating Code Crosswalks (Mappings)

1. Right-click the category.



The screenshot shows the 'Codeset Manager' interface. On the left, the 'Code Mappings Workspace' contains a tree view with categories: 'Code Mappings', 'APJ Demo', 'C_Name', 'EDW', 'ICD Crosswalks', 'Integrated_Data', 'Mappings', and 'New_Category'. A context menu is open over the 'Mappings' category, listing the following actions: 'New Sub Category', 'Edit Category', 'Delete Category', 'New Map' (highlighted), 'Import Legacy Maps', and 'Assign Users'. On the right, the 'Codeset Mapping Grid' is visible, showing a table with columns: '#', 'Source Category', 'Source Codeset', and 'Source Codeset Version'. The table contains four rows of data, all with 'Sales_Codeset' and '1.00' in the last two columns.

#	Source Category	Source Codeset	Source Codeset Version
	in DIS	Sales_Codeset	1.00
	in DIS	Sales_Codeset	1.00
	in DIS	Sales_Codeset	1.00
	in DIS	Sales_Codeset	1.00

2. Click **New Map**.

The New Codeset Map page appears.

Creating Code Crosswalks (Mappings)

New Codeset Map

Codeset Map Name*

Codeset Map Version

Codeset Map Description

Source Codeset

- 3rd Party Flat Files.Misc Marital Status Codes
- 3rd Party Flat Files.Misc Gender Codes
- APJ Demo.Gender Codes
- EDW.Gender
- EDW.Marital Status
- EDW.Country Codes

Source

- 3rd Party Flat Files
- 3rd Party Flat Files.3rd Party Flat Files
- A_System
- A_System.A_Environment
- AdventureWorks
- AdventureWorks.AdentureWorks_Staging

Target Codeset

- 3rd Party Flat Files.Misc Marital Status Codes
- 3rd Party Flat Files.Misc Gender Codes
- APJ Demo.Gender Codes
- EDW.Gender
- EDW.Marital Status
- EDW.Country Codes

Target

- 3rd Party Flat Files
- 3rd Party Flat Files.3rd Party Flat Files
- A_System
- A_System.A_Environment
- AdventureWorks
- AdventureWorks.AdentureWorks_Staging

Auto Map

*Auto mapping occurs for source and target codes having the same values.

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.

Creating Code Crosswalks (Mappings)

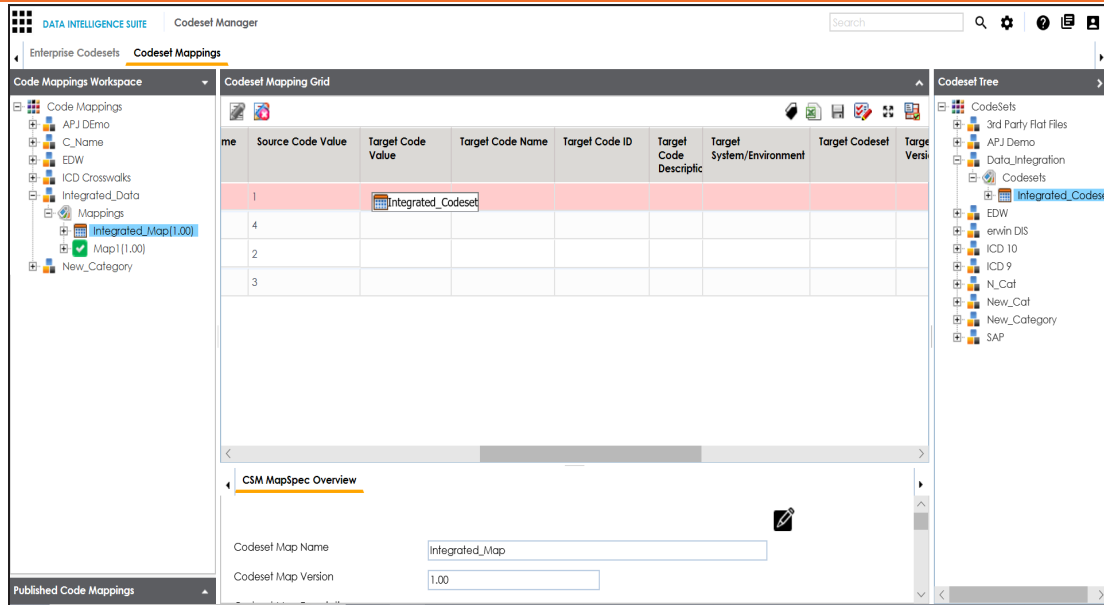
The screenshot displays the Codeset Manager application interface. The main window is titled "Codeset Manager" and contains several panes:

- Code Mappings Workspace:** A tree view on the left showing a hierarchy of code mappings, including "Integrated_Map(1.00)".
- Codeset Mapping Grid:** A central table with the following columns: #, Source Category, Source Codeset, Source Codeset Version, Source System/Environment, Source Code Description, and Source Code ID. It contains four rows of data for "erwin DIS" mappings.
- Codeset Tree:** A tree view on the right showing the structure of codesets, including "erwin DIS" and "Sales_Codeset".
- CSM MapSpec Overview:** A pane at the bottom showing the "Codeset Map Name" as "Integrated_Map" and "Codeset Map Version" as "1.00".

#	Source Category	Source Codeset	Source Codeset Version	Source System/Environment	Source Code Description	Source Code ID
1	erwin DIS	Sales_Codeset	1.00	Project_System		710
2	erwin DIS	Sales_Codeset	1.00	Project_System		711
3	erwin DIS	Sales_Codeset	1.00	Project_System		712
4	erwin DIS	Sales_Codeset	1.00	Project_System		713

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.

Creating Code Crosswalks (Mappings)



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](#)

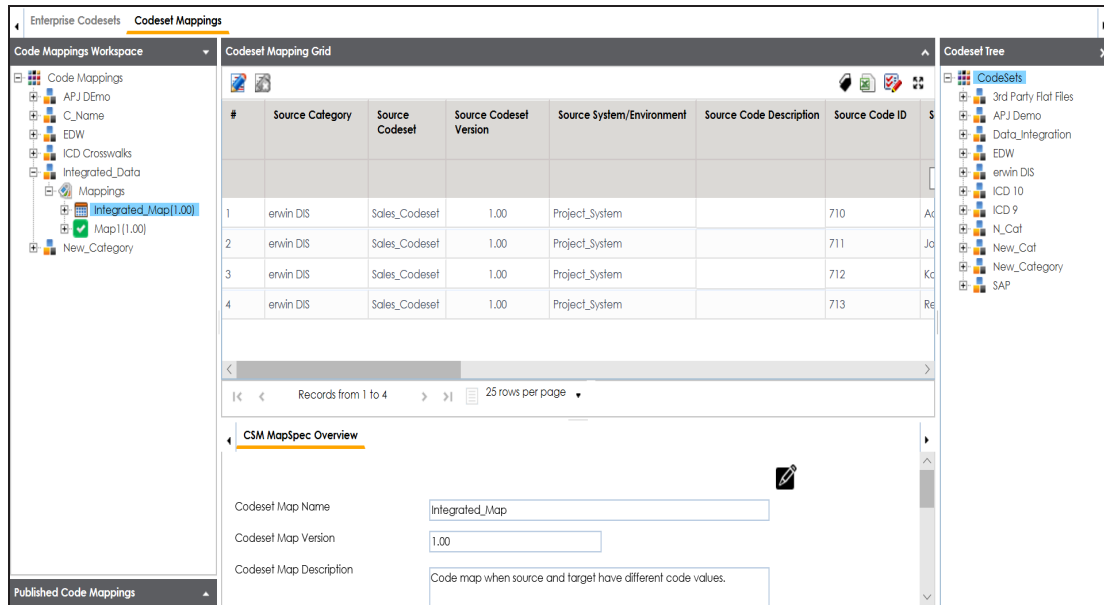
Editing Code Mappings

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 CSMMMapSpec Overview pane appears.



3. In **CSM Mapping Overview** pane, click .

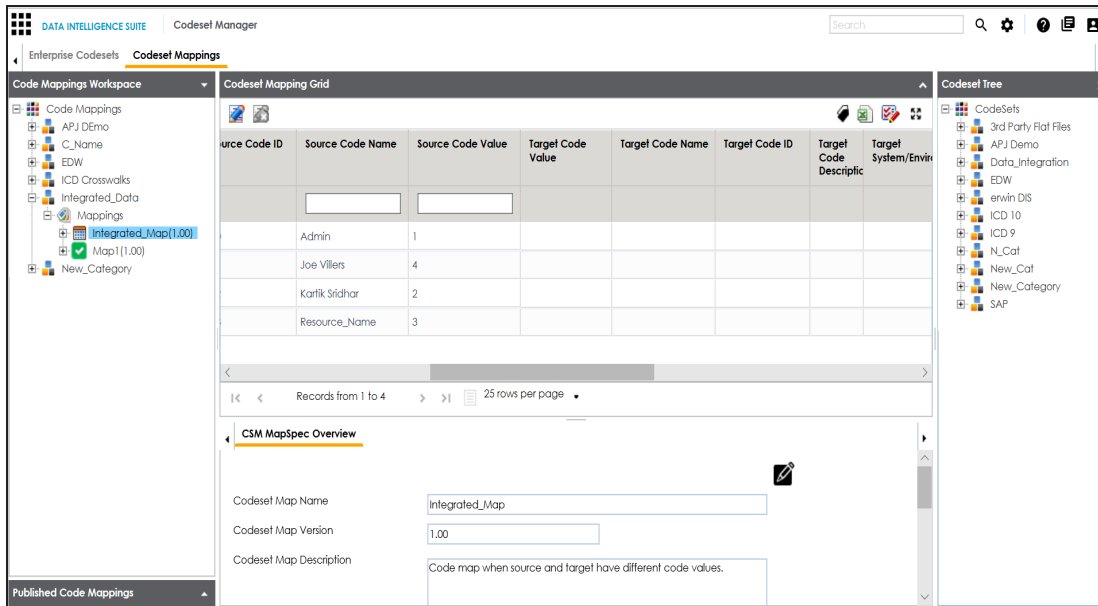
You can update Codeset Map Name and Codeset Map Description.

 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 .

Editing Code Mappings

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.




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.

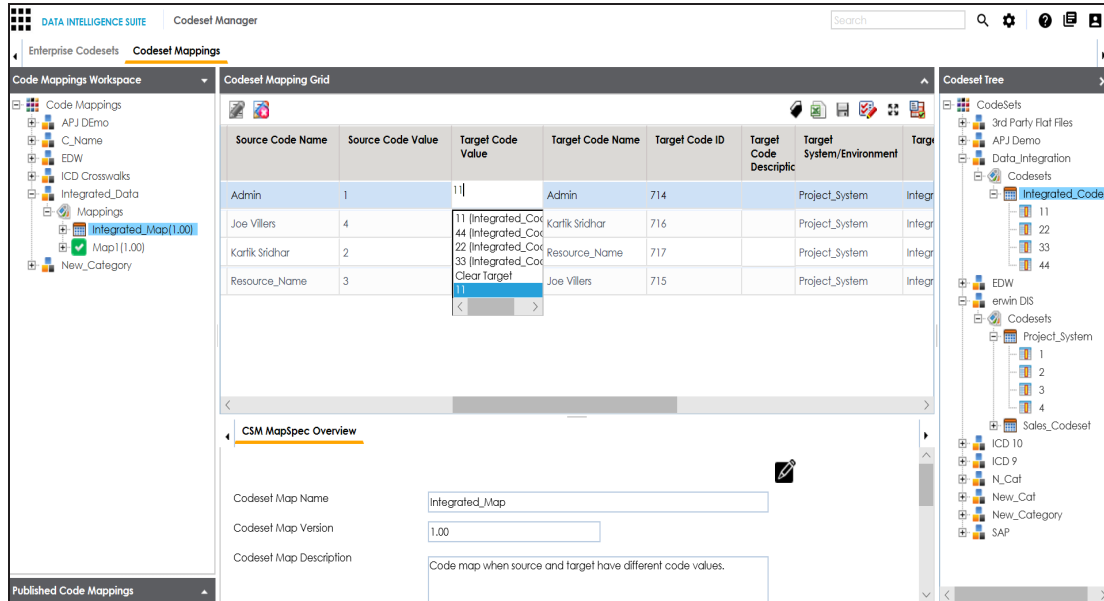
2. In the Codeset Tree, expand the target category and the **Codesets** node.
3. Drag and drop the target codeset into the Code Set Mapping Grid under the Target Code Value column.
4. Click .

The target codeset is updated in the Codeset Mapping Grid.

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

Editing Code Mappings

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.



The screenshot displays the Codeset Manager application. The main window is titled "Codeset Manager" and shows a "Codeset Mapping Grid" with the following data:

Source Code Name	Source Code Value	Target Code Value	Target Code Name	Target Code ID	Target Code Descrip	Target System/Environment	Target
Admin	1	11	Admin	714		Project_System	Integr
Joe Villers	4	11 [Integrated_Cod 44 [Integrated_Cod	Karlik Sridhar	716		Project_System	Integr
Karlik Sridhar	2	22 [Integrated_Cod 33 [Integrated_Cod	Resource_Name	717		Project_System	Integr
Resource_Name	3	Clear Target	Joe Villers	715		Project_System	Integr

Below the grid is the "CSM MapSpec Overview" section, which includes the following fields:

- Codeset Map Name: Integrated_Map
- Codeset Map Version: 1.00
- Codeset Map Description: Code map when source and target have different code values.

3. Click .

The target code values are updated.

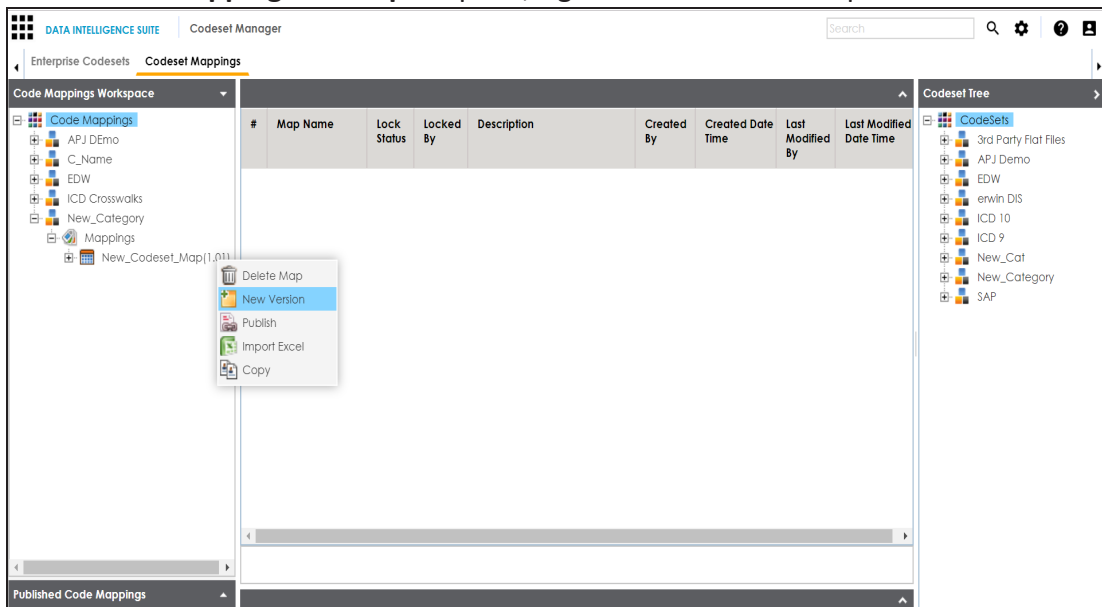
Versioning Code Mappings

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.



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

Versioning Code Mappings

The screenshot shows a window titled "New Codeset Map Version". It contains the following fields:

- Codeset Map Name*: New_Codeset_Map
- Codeset Map Version: 1.02
- Codeset Map Description: (empty text area)
- Map Version Label: (empty text field)
- Map Changed Description*: (empty text area)

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 Name	Specifies the name of the codeset map. For example, Gender Crosswalk.
Codeset Map Version	Specifies the new version of the codeset map. For example, 1.02.
Codeset Map Description	Specifies the description about the codeset map. For example: The codeset map is the code mappings between the two codesets, Misc Gender Codes and Gender.
Map Version Label	Specifies the version label of the codeset map. 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 [Using Codesets Manager](#) section.

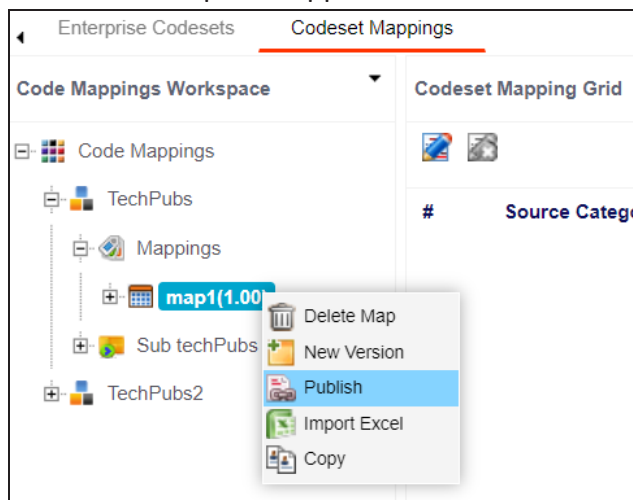
Before associating a code map with data item mappings, ensure that you publish the code map.

Publishing Code Maps

To publish code maps, follow these steps:

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

The available options appear.



3. Click **Publish**.

The Publish Codeset Map page appears.

Associating Code Maps with Data Item Mappings

The screenshot shows a 'Publish Codeset Map' dialog box with 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), 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 Name	Specifies the name of the code map. For example, Gender Crosswalk.
Codeset Map Version	Specifies the new version of the code map. 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 Label	Specifies the version label of the code map. For example, Beta.
Map Changed Description	Specifies the description about the changes made in the code map. For example: Code values were updated.
Publish Environment	Specifies the environment where the code map is being published. For example, test. You can create publish environments in Enterprise Codesets.

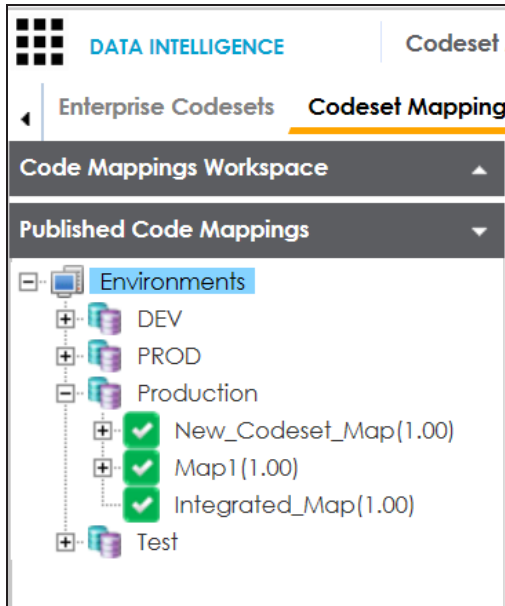
Associating Code Maps with Data Item Mappings

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

5. Click .

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

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



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

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.

Associating Code Maps with Data Item Mappings

The Mapping Specification grid appears.

#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5
2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	nvarchar	40
3	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	nvarchar	30
4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	nvarchar	30
5	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	nvarchar	60

3. Click .

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

Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Nullable Flag
customers	PostalCode	nvarchar	10	0		
customers	City	nvarchar	15	0	0	<input checked="" type="checkbox"/>

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 Catalog**.

7. Drag the code map into the **Mapping Specification** grid and drop it under the **CSM Mapping** column for the required row.

Associating Code Maps with Data Item Mappings

8. Click .

The code map is associated with the data item mappings.