

# erwin Data Intelligence

# **Mapping Management Guide**

Release v13.1

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### Contents

Managing Mappings	
Using Mapping Manager	
Creating and Managing Mapping Specifications	
Creating Projects	
Adding Documents	
Assigning Users	
Assigning Roles	
Configuring Extended Properties	27
Default Connector	
Reference Data Manager	
Importing from Excel	
Adding Tasks	
Configuring Task Types	47
Managing Tasks	
Creating Subject Areas	
Subject Areas	
Nested Subject Areas	
Managing Subject Areas	
Managing Projects	
Defining Transformations	
Configuring Transformation Library	
Uploading Transformations	

Downloading Templates	67
Managing Transformations	
Creating Maps	72
Drag and Drop	
Creating Mapping Specifications using Metadata Search View	
Creating Mapping Specifications Using Metadata Tree View	
Setting Target Update Strategy	
Graphical Designer	
Creating Mapping Specifications using Metadata Search View	
Creating Mapping Specifications using Metadata Tree View	
Setting Target Update Strategy	101
Auto-Map	104
Creating Mapping Specifications	
One to Many and Many to Many Mapping Specifications	
Creating Mapping Specifications Using Metadata Search View	
Creating Mapping Specifications Using Metadata Tree View	
Setting Target Update Strategy	
Adding Transformation and Lookup Details	
Adding Transformation Details	
Adding Lookup Details	
Graphical Designer	
Adding Transformation Details	
Adding Lookup Details	

Updating Mapping Specifications Manually	
Uploading Mapping Specifications in XML	
Specifying XPath in Mapping Specifications	
Setting Column Order and Visibility	
Column Order	147
Column Visibility	
Updating Additional Mapping Information	
Updating Map Spec Overview	
Updating Source Extract SQL	
Setting Target Update Strategy	
Updating Testing Notes	
Adding Mapping Specification Documents	
Assigning Mapping Specifications to Users	
Linking Additional Specification Artifacts	
Recording Level of Effort	
Viewing Change Logs	
Viewing Release Information	
Adding Tasks	
Configuring Task Types	
Managing Tasks	
Configuring Extended Properties	
Default Connector	
Reference Data Manager	

Importing from Excel	
Branching and Merging Maps	
Branching Maps	
Merging Changes into Parent Maps	
Deleting Maps	
Viewing Workflow Logs	
Analyzing Mappings	
Generating Virtual Preview of Targets	
Previewing Data	
Performing Table Gap Analysis	
Performing Column Gap Analysis	
Running Impact Analysis	
Running Lineage Analysis	
System	
Viewing Lineage	
Working on Lineage	
Environment	
Viewing Lineage	
Working on Lineage	
Table	
Viewing Lineage	
Working on Lineage	
Column	

Viewing Lineage	
Working on Lineage	
Running End to End Lineage	
Opening Business View	
Viewing Mapping Statistics	
Associating Mappings	
Associating Code Maps with Data Item Mappings	
Publishing Code Maps	
Associating Code Maps	
Associating Reference Tables with Mappings	
Linking Requirements to Mappings	
Publishing and Creating Versions of Mappings	
Creating Versions of Maps	
Base-lining Projects	
Comparing Two Different Mapping Versions	
Publishing Mappings	
Publishing Mappings	
Updating Publishing Details	
Restoring Archived Maps As Active	
Exporting Mapping Specifications	
Proprietary XML Format	
ETL Jobs	
Creating and Managing Test Cases for Mappings	

Creating Test Cases	
Creating Project-Level Test Cases	
Creating Map-Level Test Cases	
Adding Validation Steps	
Adding Validation Steps to Project-Level Test Cases	
Adding Validation Steps to Map-Level Test Cases	
Adding Documents	
Adding Documents to Project-Level Test Cases	
Adding Documents to Map-Level Test Cases	
Managing Test Cases	
Managing Project-Level Test Cases	
Managing Map-Level Test Cases	
Viewing Mapping Manager Dashboard	
Statistics	
Mapping Summary	
Mapping Status	
Proactive Impact Analysis - Truncation Impacts	
Project Overview	
Mapping Classification	
Mapping Assignments	
Sources/Targets Not Mapped	
Test Case Status	
Project Test Cases	

# Managing Mappings

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

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

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

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

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

## **Using Mapping Manager**

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

Workspace Mappings 1	Projec	t Summary								2
Mappings	#	Project Name	Project Description	Project Owner		Mappi Count	Created By	Created Date Time	Last Modified By	Last Modified Date Time
ABC (3)   DigitalAdoption (4)	1	Lineage Demo			0	14	Administrator	2020-02-26 04:01:32.913	Administrator	2020-02-26 04:01:32.913
<ul> <li>Erwin_Sales (0)</li> <li>erwinDIS (7)</li> </ul>	2	Test Source			0	3	Administrator	2020-02-26 04:02:38.79	Administrator	2020-02-26 04:02:38.79
<ul> <li>ffgg (2)</li> <li>FlowTest (3)</li> </ul>	3	TestData Map			0	30	Administrator	2020-02-26 04:03:32.11	Administrator	2020-02-26 04:03:32.11
Hi-Tunes (2)	4	TestMap			0	4	Administrator	2020-02-26 04:04:19.267	Administrator	2020-02-26 04:04:19.267
	5	WhatfixTrial			0	0	Administrator	2020-03-16 05:30:34.073	Administrator	2020-03-16 05:30:34.073

UI Section	Function
1-Workspace Mappings	Use this pane to browse and work on projects and mappings.
2-Central Pane	Based on your selection in the browser pane, use this pane to view or work on the data.
3-Mapping Manager Dashboard	Use this pane to view statistics related to mappings and projects.
4-Published Mappings	Use this pane to view and export details of published mappings.

Managing mappings involves the following:

- Creating and managing mapping specifications
- Analyzing mappings
- Associating mappings
- Publishing and creating mapping versions
- Exporting mapping specifications

Using Mapping Manager

- Creating and managing test cases for mappings
- Viewing mapping manager dashboard

## **Creating and Managing Mapping Specifications**

After defining systems and uploading metadata in the Metadata Manager, you can create mapping specifications. The Mapping Manager offers multiple ways to create mapping specifications. This section walks you through building metadata driven source to target mapping specifications and enterprise standards to manage them.

Creating and managing mapping specifications involves:

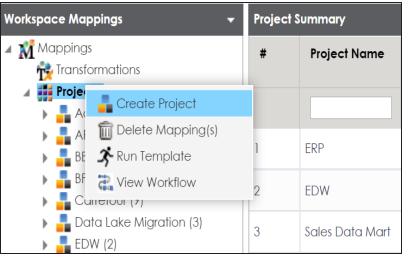
- Creating projects
- Defining transformations
- Creating maps
- Adding transformations and lookup details
- Updating mapping specifications manually
- Uploading mapping specifications in XML format
- Specifying XPath in mapping specifications
- Setting column order and column visibility
- Updating additional mapping information
- Branching and merging maps
- Deleting maps
- Viewing workflow logs

# **Creating Projects**

Projects store and group maps in a hierarchy, Projects > Mappings. You can create an ETL tool-specific project and specify its details, such as project description, project manager, business sponsor, cost center, and IT sponsor.

To create projects, follow these steps:

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



3. Click Create Project.

The Create Project page appears.

#### **Creating Projects**

Create Project		×
Project Details Project Details	ocuments Project Users	Project Roles
		Save & Continue Save & Exit Cancel
Project Name*		Cost Center
Description	<u>а н</u> в <i>и</i>	
		<b>^</b>
Project Manager Name		IT Sponsor Name
Business Sponsor Name		
Project ETL	BODS Pseudocode	Enable display of Transformation without pseudocode

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

Field Name	Description					
	Specifies the name of the project.					
Project Name	For example, Data Lake Migration.					
	For more information on naming conventions, refer to the					
	Best Practices section.					
	Specifies the description of the project.					
Description	For example: The project contains the mapping spe-					
	cifications for the sales data migration.					
Droject Manager Name	Specifies the project manager's name.					
Project Manager Name	For example, John Doe.					
Rusiness Spansor Name	Specifies the business sponsor of the project.					
Business Sponsor Name	For example, ABC Consulting Services.					
Droiget CTI	Specifies the ETL tool assigned to the project.					
Project ETL	For example, Informatica Pseudocode.					
Cost Center	Specifies the cost center of the project.					
	For example, Finance and Accounting.					
IT Spansor Nama	Specifies the IT sponsor of the project.					
IT Sponsor Name	For example, XYZ IT Services.					

#### **Creating Projects**

Field Name	Description
	Specifies whether the transformation is displayed without
Enable display of Trans-	pseudocode.
formation without pseudo	Switch Enable display of Transformation without pseudo-
code	<b>code</b> on ( ) to display transformation without pseudo-
	code.

#### 5. Click Save and Exit.

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

Once a project is created, you can enrich it further by:

- Adding supporting project documents
- Assigning users to the project
- Configuring extended properties
- Creating Tasks
- Creating subject areas
- Creating maps
- Tagging projects

You can also manage a project by using the options available on right-clicking the project. Managing projects involves:

- Uploading legacy maps
- Export mappings
- Export change logs
- Viewing reports
- Sharing links
- Deleting projects
- Viewing workflows

### **Adding Documents**

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

To add documents to projects, follow these steps:

- 1. In the Workspace Mappings pane, click a project.
- 2. Click the Project Documents tab.

The following page appears.

Workspace Mappings 🔹 👻	4	Mapping Summary	Project Details	Project Documents	Project Users	Extended I	Properties Collab	ooration Center
Mappings		oject Documents Grid						
Projects     Carrefour (9)	Ľ	Document Name	Docum	ent Type Docur	nent Link Doc	ument Status	Document Owner	Description
<ul> <li>Data Lake Migration (3)</li> <li>EDW (3)</li> </ul>								
<ul> <li>ERP (2)</li> <li>Erwin_Project (4)</li> </ul>								
<ul> <li>Erwin_Sales (0)</li> <li>Exeter (2)</li> </ul>								

### 3. Click 💽.

#### The Add Project Document page appears.

Add Project Document					_ 🗆 ×
				Ľ ×	
Document Name*		Document Owner		]	
Document Reference		Document Object	Drag-n-Drop files here or		
Reference Number			click to select files for upload.	-	
Document Link					
Description	îr <u>A</u> <u>H</u> B <i>I</i> <u>U</u> ≣ ∺				
Approval Required Flag					

**Adding Documents** 

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

Option	Description						
Document	Specifies the name of the physical document being attached to the pro- ject.						
Name	For example, Project Details.						
Document	Specifies the name of the reference document.						
Reference	For example, Wikipedia pages.						
Reference	Specifies the reference number of the reference document.						
Number	For example, KB_230145.						
Document	Specifies the document owner's name.						
Owner	For example, John Doe.						
Document Object	Drag and drop or use ≐ to browse and select the document.						
Deeuweent	Specifies the URL of the document.						
Document Link	For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn- b5YkMBq4ptA7jhg5/view						
	Specifies the description of the document.						
Description	For example: The document is to keep a record of description and data dictionary of the system.						
Approval	Specifies whether the document requires approval or not.						
Required Flag	Select the <b>Approval Required Flag</b> check box to select the document status.						
	Specifies the status of the document.						
Document	For example, In Progress.						
Status	Select the status of the document from the drop down. This field is avail- able only when the <b>Approval Required Flag</b> check box is selected.						

# 5. Click

The project document is saved in the Project Documents Grid.

#### **Adding Documents**

Workspace Mappings 🗸 👻	▲ <sup>N</sup>	Napping Summary	Project Details	Project Documents	Project Users E	xtended Properties	Collaboration Center	•
Mappings	Proje	ct Documents Grid						
Transformations	Ð							
<ul> <li>Earrefour (9)</li> <li>Lata Lake Migration (3)</li> </ul>		Document Type	Document Link	Document Status	Document Owner	r Description	Options	
) 📕 EDW (3)		pdf	https://erwin.com	n/ InProgress	Samuel		0 ± /	×
<ul> <li>ERP (2)</li> <li>Erwin_Project (4)</li> </ul>								
Erwin_Sales (0)								
<ul> <li>Exeter (2)</li> <li>IQVIA (1)</li> </ul>								

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

### Information (10)

Use this option to view the document information.

### Download (📥)

Use this option to download the document.

Edit 🖊

Use this option to update the document details.

### Delete(🗙)

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

## **Assigning Users**

You can assign one or more members of your team to a project. Team members assigned to a project have write access to all mappings under it. Ensure that the roles assigned to the users have the required permissions.

To assign users, follow these steps:

- 1. In the **Workspace Mappings** pane, click a project.
- 2. Click the Project Users tab.

The Project Users page appears.

Workspace Mappings	•	Mapping Summary	Project Details	Project Documents	Project Users	Project Roles	Extended Properties
🖌 就 Mappings	Proj	ject Users					
🙀 Transformations	Ð						
🛛 👪 Projects	#	User ID		User Full Name	Assigned F	Role Emai	I ID Manager Nan
<ul> <li>▶ ♣ ABC (2)</li> <li>▶ ♣ dgfd (0)</li> </ul>	1	esimpson		Erica Simpson	Data Owner	_GER e.simp	oson@xyz.
DigitalAdoption (0)	2	jadams		Joey Adams	Tech Data S	teward_GER jadam	s@xyz.coi
rransformations	3	janedoe		Jane Doe	Mapping De	signer jane.d	oe@edufir K.Sridhar

3. Click 🖸

The Assign Project Users page appears.

Assign Project Users	-	□ ×
	li ×	
User ID	Assigned Users	
abc Administrator janedoe jdenver jdoe ks123 mboggs mread new_user_jd public		

4. 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

#### **Assigning Users**

under Assigned Users list-box and move them back to User ID list-box using the arrows ( volume or volume or volume or volume).

You cannot assign users with Administrator role to projects.

### 5. Click 💾.

The selected users are assigned to the project.

Projec	et Users							
Ð								
#	User ID	User Full Name	Assigned Role	Email ID	Manager Name	View	Edit	Delete
1	esimpson	Erica Simpson	Data Owner_GER	e.simpson@xyz		0	/	×
2	jadams	Joey Adams	Tech Data Steward_GEF	Rjadams@xyz.co		0	/	×
3	janedoe	Jane Doe	Mapping Designer	jane.doe@edufi	K.Sridhar	0	/	×
4	jwilson	Joey Wilson	Tech Data Steward_RO	jwilson@xyz.cor		0	/	×

Use the following options to work on the project users list:

### Information (10)

Use this option to view project user details, such as telephone number, company, and the assigned responsibility.

### Edit (🖍 )

Use this option to update project user details, such as assigned role and assigned responsibility.

### Delete (🗶)

Use this option to remove a user from the project users list.

## **Assigning Roles**

You can assign one or more roles to a project. Users assigned to these roles get write access to all the mappings in the project. Ensure that the roles have the required permissions to access the Mapping Manager.

To assign roles, follow these steps:

- 1. In the Workspace Mappings pane, click a project.
- 2. Click the **Project Roles** tab.

The Project Roles page appears.

Workspace Mappings	•	<ul> <li>Ma</li> </ul>	apping Summary	Project Details	Project Documents	Project Users	Project Roles	Extended Properties	Collaboration Center
🔺 就 Mappings		Projec	t Roles						
n Transformations	ı	÷							
🛛 👪 Projects	1	#	Role Name	R	ole Description				Role Users
▶ ♣ ABC (2) ▶ ♣ dgfd (0)	l	1	Data Owner_RO	Thi	is role is accountable fo	r who has access to	o information assets w	ithin their functional areas	fc <u>View</u>
DigitalAdoption (0)	l	2	Data Steward_RO	Thi	is role is responsible for	utilizing Romania's	data governance	processes to ensure fitness	s <u>View</u>
Image: American Am		3	Mapping Admin	Adı	ministers Mapping Man	ager module to defi	ne, edit or delete any	mapping in any project irre	s <u>View</u>

3. Click 💽.

The Assign/Unassign Roles page appears.

#### **Assigning Roles**

As	sign/Unassign Ro	bles		- 🗆	1 ×
				Li) E	×
#	Select Role	Role Name	Role Description	Role Users	
1		Data Owner_RO	This role is accountable for who has access to information assets within their functional areas for Romania. It may decide to review and authorize each access request individually or may define a set of rules that determine who is eligible for access based on business function, support role, etc.	View	•
2		Data Steward_RO	This role is responsible for utilizing Romania's data governance processes to ensure fitness of data elements - both the content and metadata.	<u>View</u>	
3		Mapping Admin	Administers Mapping Manager module to define, edit or delete any mapping in any project irrespective to project assignment	<u>View</u>	
4		Mapping_Tester		View	
5		Tech Data Steward_UK	This role is responsible to answer how data is created, transformed, stored, and moved in technical systems for UK.	View	

4. Select the required roles.

# 5. Click 💾.

#### The selected roles are assigned to the project.

Projec	t Roles		
Ð			
#	Role Name	Role Description	Role Users
1	Data Owner_RO	This role is accountable for who has access to information assets within their functional areas for	View
2	Data Steward_RO	This role is responsible for utilizing Romania's data governance processes to ensure fitness	View
3	Mapping Admin	Administers Mapping Manager module to define, edit or delete any mapping in any project irres	View
4	Tech Data Steward_UK	This role is responsible to answer how data is created, transformed, stored, and moved in techn	<u>View</u>

You can view the users assigned to roles. To view Role Users, click View.

For example, the following Role Users page displays the users assigned to the Data Owner\_ RO role.

#### **Assigning Roles**

Role Users	_ 🗆 ×
i User ID	User Full Name
1 ksridhar	Kartik Sridhar
2 srahim	Syed Rahim

### **Configuring Extended Properties**

You can configure user-defined project properties under the Extended Properties tab. First, you need to set up a form and then use it to configure the user-defined extended properties.

To configure extended properties of projects, follow these steps:

- 1. In the Workspace Mappings pane, click a project.
- 2. Click the Extended Properties tab.

Workspace Mappings	<ul> <li>Imary</li> </ul>	Project Details	Project Documents	Project Users	Project Roles	Extended Properties	Collabora	ation Center	Þ
🔺 🕅 Mappings	Configure	Edit Delete				Import F	rom Excel	Export To Exc	el
ransformations	Form Valu	ies							
Projects				Radio					
ABC (6)				1101010					
Dele (0)				Text Box					
▶ <mark>‡</mark> dgfd (0)									1
🔺 <mark>-</mark> DigitalAdoption (7)				Combo Box	Select an option				•
🙀 Transformations									
🍓 Test Cases				Module	Links				
🖌 🔜 Mappings									
📻 cc (v1.00)			R	lesource Manager	https://erwin.com/boo	okshelf/10.2DISBookshelf/Co	ntent/Data%	20Catalog/Met	a
🔚 dfd (v1.00)									_
Flow Test (v1.00)			ħ	Metadata Manager	https://erwin.com/boo	okshelf/10.2DISBookshelf/Co	ntent/Data%	20Catalog/Met	a
FlowTesting (v1.0									

3. Click Configure.

Extended Properties Configuration					- 🗆 ×
Edit Delete					
Field Controls					
Group Text Box Combo Box	List Radio Check Box I	T Numb			▲ ▼
Configure Form			Properties		
Radio		^	Property	Value	
		1	Published		Î
Text Box		1	Field	Radio	
Combo Box	Select an option	,			-1
			Туре	Radio	
Module	Links		Configure Values	Configure	
Resource Manager	https://erwin.com/bookshelf/10.2DISBookshelf/Con	te			
			Description		
Metadata Manager	https://erwin.com/bookshelf/10.2DISBookshelf/Con	te •	Visible in Extended Propertie		-

The Extended Properties Configuration page contains the following sections:

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

Extended Properties Configuration			
Save Cancel Delete			
Field Controls			
Text Box Check Box Number	Boolean Date Picker Category Rich E		
Configure Form		Configure Form	
		Property	Value
Check Box		Published	ON
Rich Editor		Field	Rich Editor
		Туре	Rich Editor
		Dependencies	Type or click here
		Configure Values	Configure
		Mandatory	OFF
		Regular Expression	
		Note <sup>*</sup> : 1.Double click on the field cell to update the field nam 2. Select the field name to update its properties	6

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

Refer to the following table for property descriptions:

Property	Description
Published	Switch <b>Published</b> to <b>ON</b> to publish the field.
Field	Specifies the field label.

**Configuring Extended Properties** 

Property	Description
	To change the field labels, double-click the corresponding <b>Value</b> cell.
	For example, Project Approved On.
	Specifies the type of the field.
Туре	To select field types, double-click the corresponding <b>Value</b> cell.
	For example, Date Picker.
Dependencies	Defines the pick list that can be used as controlling fields. It works only with the Reference Data Manager connector.
	To define pick list, select the fields from the drop down option.
	Specifies the connectors for the field.
	To enter option values, click <b>Configure Values</b> .
	Use the following options:
Configure Values	Default connector: Use this option to enter option values manually or using an MS Excel file.
	Reference Data Manager: Use this option to pull option values from reference tables in the Reference Data Manager.
Mandatory	Specifies whether the field is mandatory.
	Specifies the field description.
Description	To enter field descriptions, double-click the corresponding <b>Value</b> cell.
Visible in Exten-	Switch Visible in Extended Properties to ON to make it visible on
ded Properties	the Extended Properties tab.
	Specifies the order of the field on the Extended Properties tab.
Order	To enter the order number, double-click the corresponding <b>Value</b> cell.
	You can also drag and move fields in the Configure Form pane to change their order.

### 6. Click Save.

The form is saved, and is available on the **Extended Properties** tab.

**Configuring Extended Properties** 

You can download extended properties in the XLSX format and use it as a template to <u>import extended properties</u>. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.

When you configure extended properties using UI elements, such as combo box, radio button, and list, you also need to configure their option values. You can use the default connector to import option values from an MS Excel file or enter them manually.

To configure option values using the default connector, follow these steps:

1. In the **Configure Form** section, click the required UI element.

Ensure that you are in edit mode.

2. In the **Properties** section, click **Configure**.

The Connectors page appears.

Connectors	_ 🗆 ×
Default Connector	Next

3. On the **Connectors** page, ensure that the Default Connector option is selected. Then, click **Next**.

The <UI\_Element> Options page appears. For example, if the UI element is Combo Box, the Combo Box Options page appears.

Combo Box Options	_ <b>_</b> ×
Add Save Delete Import Excel	
Text	Value

4. Use the following options:

#### Add

Use this option to enter text and value manually.

#### **Import Excel**

Use this option to import options from MS Excel files.

5. After configuring option values, click **Save**.

To add option values manually, follow these steps:

- 1. Click Add.
- 2. Enter values to the Text and Value fields.

The Text corresponds to options whereas the Value corresponds to underlying value of an option. You can add as many values as needed.

Combo Box Options	_ □ ×
Add Save Delete Import Excel	
Text	Value
Data Steward_GER	rcooper
Data Steward_ROM	vsmith

3. Click Save.

The option values appear in the UI element under the Configure Form section.

Combo Box	Select an option	
	Select an option	
	Data Steward_GER	
	Data Steward_ROM	

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

1. Click Import Excel.

The Upload Excel page appears.

Upload Excel	_ 🗆 X
Attach Excel File Choose File No file chosen	<b>A</b>
1 ×	
Note <sup>*</sup> : 1. Empty FIELD pairs are ignored.	
2. Duplicate FIELD pairs are ignored.	
<ol><li>Slash(/) FIELD pairs are ignored.</li></ol>	
4. FIELD pair with more than 200 characters are ignored.	•

2. Click **Choose File** and select the required MS Excel file.

The Upload Excel page appears. It displays the data in the MS Excel file.

Upload Excel			
#	GROUP NAME	ROLE NAME	USER ID
#	Select Column To Import	Select Column To Import	Select Column To Import
1	Data Stewards	Data Steward_GER	mmannigan
2	Data Stewards	Data Steward_GER	mmenza
3	Data Stewards	Data Steward_GER	mmannigan

3. Double-click the **Select Column To Import** cell in the required column.

The available options appear.

#	GROUP NAME	ROLE NAME	USER ID
#	Select Column To Import	Select Column To Import	Select Column To Import
		VALUE	
1	Data Stewards	Clear Selection	mmannigan

4. Select the appropriate option.

Field corresponds to options and Value corresponds to value of an option. You can import multiple columns. Use Clear Selection to undo the selection.

5. Click 1

The <UI\_Element> Options page appears. It displays the imported columns. You can delete a row that is not required. To delete rows, click a row and then click **Delete**.

Combo Box Options		_ 🗆 ×
Add Save Delete Import Excel		
Text	Value	
Data Steward_GER	mmannigan	•
Data Steward_UK	rcooper	
Data Owner_GER	esimpson	
Data Owner_RO	ksridhar	
Tech Data Steward_GER	jadams	-

6. Click Save.

The option values appear in the UI element under the Configure Form section.

Combo Box	Select an option	~
	Select an option	
	Data Steward_GER	
	Data Steward_UK	
	Data Owner_GER	
List	Data Owner_RO	
	Tech Data Steward_GER	
	Mapping Admin	
	ETL Developer	
	Mapping Designer	

### **Reference Data Manager**

When you configure extended properties using UI elements, such as combo box, radio button, and list, you also need to configure their option values. You can use the Reference Data Manager connector to import option values from tables in the Reference Data Manager.

To configure option values using reference data manager connector, follow these steps:

1. In the **Configure Form** section, click the required UI element.

Ensure that you are in edit mode.

2. In the **Properties** section, click **Configure**.

Connectors

The Connectors page appears.

3. On the **Connectors** page, click **Reference Data Manager** and then click **Next**.

The Reference Data Manager page appears. It displays the reference folders in the Connector View pane.

**Reference Data Manager** 

Reference Data Manager		1 ×
Back	Finis	h
Connector View	<	<
E- <b>∰</b> Reference Folders		
🔃 📲 erwin Sales		
🖶 📲 erwin_DG		
🖮 📲 TechPubs		
		ers
		Parameters
		Par
Preview Data		^

4. In the **Connector View** pane, expand a reference folder and select a reference table.

The Parameters pane displays the columns in the reference table. You can also click Preview to view the data in the reference table.

#### **Reference Data Manager**

Reference Data Manager				_ ¤ ×
				Back Finish
Connector View <	Parameters			>
□- <b> II</b> Reference Folders			Reset	Field
🛱 🎝 erwin Sales	СІТҮ	Select	•	0
⊨@Reference Tables	CITY_NAME	Select	•	0
E CITY_NAME(1.00)				
E-TECHPUBS_TEAM(1.00)				
⊕- <b>∭</b> T_NAME(1.00)				
⊕- <b>∭</b> SALES_REF_DATA(1.00)				
ia- IIIHR_REF_TABLE(1.00)				
n envin DG				
Preview Data				*
			Records 10	Preview
# CITY	CITY_N	AME		

5. In the **Parameters** pane, click the radio button next to the required column.

You can select the controlling field from the drop down option. Ensure that you define the required dependencies in the Properties pane and that the option values for controlling field are configured using the same reference column.

6. Click Finish.

The Extended Properties Configuration page appears.

#### **Reference Data Manager**

Extended Properties Configuration						_ 🗆 ×
Save Cancel Delete						
Field Controls						
Group Text Box Combo Box	List Radio Check Box	T Number	Boolean	Date Picker	Category	•
Configure Form		Prope	erties			
Selected Koles Group	Compliance Unicer	Prop	erty	Value	•	
	Mumbai Los Angeles	Descri	iption			*
List of Cities	New Delhi	Load	On Startup	OOF		
Radio		Visible	e in Extended P	Properties ON	)	-

- 7. Under the **Properties** section, switch **Load on Startup** to **ON**.
- 8. Click Save.

The option values are configured. For example, in the following form the List of Cities is the controlling field for Selected City. Both the fields get their option values from the same reference column.

Configure Form	
Governance Responsibilities	Compliance Officer
Selected Roles Group	Compliance Officer
List of Cities	Mumbai Los Angeles New Delhi
Selected City	Cos Angeles

### **Importing from Excel**

You can import user-defined project properties from an XLSX file. You can either use an existing XLSX file or download an extended properties file from a project. Ensure that the XLSX file follows the correct template.

To import extended properties from XLSX files, follow these steps:

1. On the Extended Properties tab, click Import From Excel.

The Upload Excel page appears.

Upload Excel	<u> </u>
Attach Excel File Choose File No file chosen	
(1) 🗙	

- 2. Click Choose File.
- 3. Browse and select the XLSX file.
- 4. Click

The Upload Excel page appears. It displays the data in the XLSX file.

Upload Excel						-
#	FIELD	VALUE	<sup>≜</sup> TYPE	PARENTFIELD	CREATED_BY	CREATED_DATE_TIME
#	Select Column To Import					
1	Data Stewards		Combo Box			
2	Data Steward_UK	Data Steward_UK	Text Box	/Data Stewards	Administrator	10/20/2020 06:42:38
3	Data Steward_GER	Data Steward_GER	Text Box	/Data Stewards		
4	Data Owners	Data Owner_GER	Text Box		Administrator	10/20/2020 06:42:38

5. Double-click the Select Column To Import cell in the required column.

The available options appear.

### Importing from Excel

Upload Excel				
Û×				
#	FIELD	VALUE	<sup>≜</sup> TYPE	PARENTFIELD
#	Select Column To Import FIELD VALUE	Select Column To Import	Select Column To Import	Select Column To Import
1	TYPE PARENTFIELD		Combo Box	
2	Clear Selection Data Steward_UK	Data Steward_UK	Text Box	/Data Stewards
3	Data Steward_GER	Data Steward_GER	Text Box	/Data Stewards

6. Select an appropriate option.

For example, if you select Field, then the selected column is imported as Field.

Similarly, you can also select the Value, Type, and Parentfield columns. Ensure that you at least select a Field column.

# 7. Click

The extended properties are imported.

Import From Excel	Export To Excel
	telp
	Self Help
Select an option	~
Data Owner_GER	
Tech Data Steward_GER	
Mapping Designer	•
	Select an option Data Owner_GER Tech Data Steward_GER

To improve productivity and collaboration, you can create tasks related to mapping projects. These tasks may be to-do tasks, access requests, or issues. With Action Center Settings, you can manage task types.

To add tasks, follow these steps:

1. In the **Workspace Mappings** pane, click a project.

Workspace Mappings	◀ Map	Mapping Summar ping Search	y Project Details	Project Documents	Project Use	ers Pro	ject Roles Ex	ended Properties	My Action Center	
DigitalAdoption (5)	Мар	ping Details								ڻ 🔋
a erwinDIS (8) Transformations	#	Project Name	Subject Hierarchy	Map Name	Lock Status	Locked By	Locked Date	Workflow Status	Mapping State	Mapping Description
🇞 Test Cases										
▲ See Mappings Bb (v1.00)	1	erwinDIS		bb	a			Preliminary Draft	In Progress	
BugTrial (v1.00)	2	erwinDIS		BugTrial	â	Administrator	09/15/2020 08:48:4	8 Preliminary Draft	Approved	Testing for a b
Demo (v1.00)	3	erwinDIS		Data Integration	â	Administrator	07/13/2021 03:23:4	2 Preliminary Draft	Approved	
Flow Test (v1.00)	4	erwinDIS		Demo	a			Preliminary Draft	In Progress	
TechPubsBUgTrial (v	5	erwinDIS		erwinSalesIntegration	a			Preliminary Draft	Approved	

The Mapping Summary page appears.

### 2. Click the My Action Center tab.

The My Action Center tab opens. It displays a list of all tasks related to the project.

**Adding Tasks** 

1	Mappir	ng Summary	Project Details	Project I	Documents	P	Project Users Project	t Roles	Exter	ided Propertie	s My Action C	enter		, <
	Ŧ	Filter by Option	^		Search	Task	Q	đ	ŧ	Ŧ	DEFAULT SORT	•		E
	ļ	Important	3		ALL TASK	S (3)	CREATED BY ME (1)	AS	SIGNED T	O ME (2)	IK K 1/	·1 >	>	
	X	Pending	3	,			Add Business rule				DUE IN 2 DAYS			
	⊘	Completed	0		От	0	Add business rule for			nn. 2 Users 🚺	_0	Î	:	Self Help
	Ŧ	Filter by Types	^				Request Acce		ASSETS		Administrator			Se
		To-do Task	1			$\bigcirc$	Add Transformations		ntegration		DUE IN 3 DAYS	Î	:	
	01	Request Access	5 1			U	To-do Task	1 ASSE	TS 2 US	ERS 0 DOC	s E		•	

3. Click 茸.

A list of task types appears. You can add or delete a task type from this list using <u>Action Center Settings</u>.

	Search	i Task	Q	e	<u>+</u>	<b>_ _</b> c	EFAU	lt soi	RT 🔻		
	ALL TASKS (3) CREATED B		To-do Ta		Task		IK.	<	1/1	>	>1
				Requ	equest Access						
		0	Add Business rule Add business rule for e	Issue			DUE IN	1 2 DAY	s	_	
	От		Request Acces	is 1	ASSETS	2 USERS 0 D	ocs	E			:
						Created By - 🍔	Admini	strator			

4. Click the required task type.

The Create New Task page appears.

		∎ ×
Create New Task		
TASK DETAILS		
Task is being created on Asset erwinDIS PROJECT With Task Type as Ted To-do Task		•
Name PROJECT_erwinDIS_ Description		17 / 200
		Saff Helb
Important		_
YES	NO	
Due		
Assign Users		*
External user emails		
Hit the ENTER key to add a new Email		

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

Field Name	Description	
Task is being cre-	Specifies the asset for which the task is created.	
ated on Asset	This field autopopulates with the project name.	
With Task Type	Specifies the task type.	
as	For example, To do Task.	
Nerree	Specifies the name of the task.	
Name	By default, it autopopulates with a name in the fol-	

Field Name	Description
	lowing format: Project_ <project_name>. You can</project_name>
	edit it and rename the task.
	For example, Test Mappings.
	Specifies a description of a task.
Description	For example: Test all the mappings and record the
	effort required.
Important	Specifies whether the task is important
2	Specifies the due date of the task.
Due	Use 🖬 to set the due date.
	Specifies the users assigned to the task. You can
Assign Users	assign DI and BU users from the list.
	For example, Richard Cooper.
External user	Specifies the email ID of external users.
emails	For example, chris.harris@quest.com

### 6. Click 🔂.

The task is created and saved. Use  $\checkmark$  to edit the task details and attach relevant documents.

### Chat

Use the Chat tab to send messages to the assigned and external users of a task.

On the **Chat** tab, enter your message in the text box and use the following options:

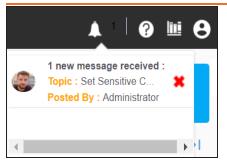
### Assigned

Use this option to send messages to the assigned users.

### **External Users**

Use this option to send messages to external users.

Users are notified via Messaging Center.



You can manage a task using the options available on the task list. Managing a task involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading Chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

With the My Action Center tab, you can filter and search tasks based on its status and assignments. For more information on search and filter mechanisms, refer to the <u>Filter and Search</u> topic.

## **Configuring Task Types**

You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue, are available. You cannot edit or delete these task types.

To configure task types, follow these steps:

1. In the utility section, click  $\equiv$ .

The Task Type Configuration pane appears. It displays a list of available task types.

Task Type Configuration	×
Add New Task Type	+
	0 / 25
Task Types	
To-do Task	/ 🗇
Request Access	/ 🗇
t Issue	/ 0

2. In the Add New Task Type box, enter a new task type and click  $(\pm)$ .

The task type is added tp the list of available tasks.

For example, in the following image, a task type, Schedule Job is added.

### Configuring Task Types

Task Type Configu	ıration	×
Add New Task Type		+
		0 / 25
Task Types		
To-do Task	1	Ō
Request Acces	s 🧳	Ō
issue	1	Ō
Schedule Job	1	Ō

Use the following options to manage task types:

Edit (🖍)

Use this option to edit task types.

### Delete (🗍)

Use this option to delete task types.

### **Managing Tasks**

Managing tasks involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading Chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

To mark tasks complete, on the task list, for the required task, click the radio button. The task is moved to the list of completed task.

For example, in the following image, the task, Add Business rule is marked complete.

Search Task	q 🖬 C <mark>9</mark>	E DEFAULT SORT
ALL TASKS (4)	CREATED BY ME (2) ASSIGNED TO ME (2)	I< < 1/1 > >I
<b>০</b> ন 💿	Add Business rule Add business rule for each source column. Request Access TASSETS VISERS DOCS	Created By - 😂 Administrator
	Add Transformations Add transformations for Data Integration. To-do Task TASSETS 2 USERS 0 pocs	DUE IN 3 DAYS

To manage tasks, follow these steps:

1. In the task list, for the required task, click **!**.

The available options appear.

#### **Managing Tasks**

Search Task	Q 📑 C <sup>0</sup> 🛨	=	DEFAULT SORT 🔻
ALL TASKS (4)	CREATED BY ME (2) ASSIGNED TO ME (2)		I< < 1/1 → >I
от о	Add-Business-rule Add business rule for each source column. Request Access TASETS 2 USERS DOCS	Create	COMPLETED
. 0	Add Transformations Add transformations for Data Integration. To-do Task 1 Assets 2 USERS 0 DOCS E	Create 🔉	Edit Task Details Disable Notification
	Test the mappings Test all the mappings and record the effort required. To-do Task <b>1</b> Assets <b>2</b> USERS <b>0</b> pocs		Download Chat as Text Send Chat as Email
<b>#</b> 0	PROJECT_erwinDIS_ Add mapping admin Issue Assets 2 Users o docs	C	Mark as Pending

2. Use the following options to work on tasks:

#### **View Task Details**

Use this option to view task details. These details include task name, description, assigned assets, attached documents, and so on.

#### **Edit Task Details**

Use this option to update task details.

### **Disable Notification**

Use this option to stop receiving notifications related to a task. By default, notifications are enabled, and users assigned to task receive notifications.

#### **Download Chat as Text**

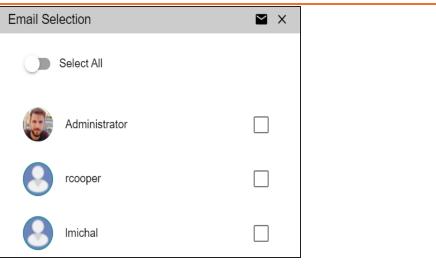
Use this option to download chat related to a task in the TXT format.

### Send Chat as Email

Use this option to share the chat related to a task via an email. Click **Send Chat** as Email.

The Email Selection page appears. It displays a list of users assigned to the task.

**Managing Tasks** 



Select the required users, and then click  $\blacksquare$ . An email is sent to the selected users.

### Mark as Pending

This option is available for a completed task. Use this option to mark a task as pending.

To delete a task, in the task list, for the required task, click  $\widehat{\blacksquare}$ .

You can delete a task only if you have created the task.

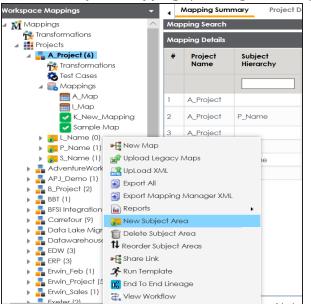
### **Creating Subject Areas**

Subject areas provide one more level of grouping for mapping specifications. You can create a subject area within a project or within another subject area. Ensure that the subject area names are unique under each project.

### **Subject Areas**

To create subject areas, follow these steps:

1. In the **Workspace Mappings** pane, right-click a project.



2. Click New Subject Area.

The Add Subject page appears.

**Creating Subject Areas** 

Add Subject		_ 🗆 ×
		<b>≝</b> × ^
Subject Name*		
Subject Description	🍖 🤮 💾 🖪 J 🖳 📰 🚍 🚍 🗮 🗄 🗄 🖆 🖌	
Additional Fields		
User Field 1	🕅 <u>A</u> 💾 B J U 🗏 🗏 🗏 🗮 🗮 🗐 🗄 🗄 🖆 🗲	
		^
		$\sim$
User Field 2	ter 🛕 H 🛛 B Z U 📰 📰 📰 📰 📰 🗄 🗄 🖆 ≼	
		^
		~

3. Enter the Subject Name and Subject Description.

For example:

- Subject Name: Members.
- **Subject Description**: This subject area is created to arrange the mappings logically.

You can use additional fields and define UI labels in Language Settings.

4. Click

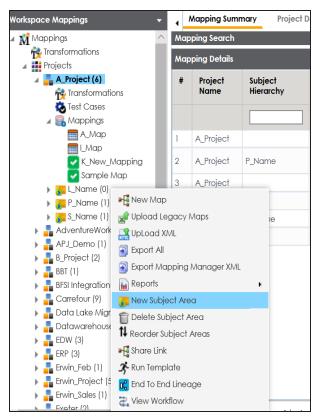
The subject area is saved and added to the project.

## **Nested Subject Areas**

You can create subject areas within another subject area. These subject areas are called nested subject areas.

To create nested subject areas, follow these steps:

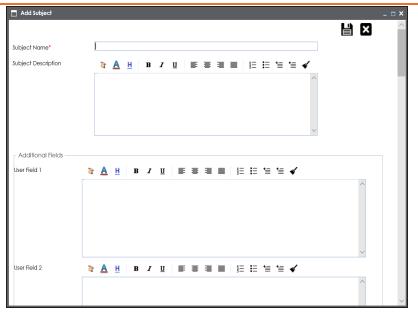
1. In the Workspace Mappings pane, right-click a subject area.



2. Click New Subject Area.

The Add Subject page appears.

**Creating Subject Areas** 



3. Enter the Subject Name and Subject Description.

You can use additional fields and define UI labels in Language Settings.

4. Click 💾.

A subject area is created under the subject area.

Once a subject area is created, you can enrich it further by <u>Tagging Subjects</u>.

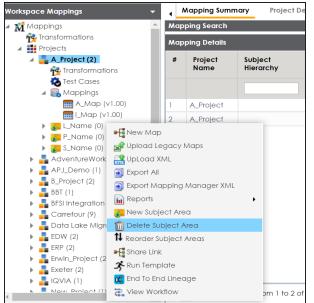
## **Managing Subject Areas**

Managing subject areas involves:

- Deleting
- Reordering

To manage subject areas, follow these steps:

1. In the **Workspace Mappings** pane, right-click a subject area.



2. Use the following options:

#### **Delete Subject Area**

Use this option to delete subject areas that are not required.

#### **Reorder Subject Areas**

Use this option to reorder subject areas. To reorder subject areas, click **Reorder Subject Areas**.

The Subject for <Project\_Name> page appears.

### **Managing Subject Areas**

📘 Subje	🗖 Subjects for: A_Project (2)						_ <b>-</b> ×	
0	Order By Ascending Order	<ul> <li>Sort Subje</li> </ul>	ct By Subject N	ame 🔽				🖬 🐻 🗙
#	Subject Name	Current Order	New Order	Parent Hierarchy	Created By	Created Date	Modified By	Modified Date
1	L_Name(0)	1	1	A_Project	Administrator	2019-10-30 11:45:11.917	Administrator	2019-10-30 11:45:11.917
2	P_Name(0)	2	2	A_Project	Administrator	2019-10-30 11:44:51.983	Administrator	2019-10-30 11:44:51.983
3	S_Name(0)	3	3	A_Project	Administrator	2019-10-30 11:35:42.867	Administrator	2019-10-30 11:35:42.867

To order subject areas, from the **Order By** list, select one of the following options:

- Ascending Order: Select this option to order in ascending alphabetical order.
- Descending Order: Select this option to order in descending alphabetical order.
- **Custom Order**: Select this option to order in custom order.

To sort subject areas, from the **Sort Subjects By** list, select one of the following options:

- **Subject Name**: Select this option to sort by subject name.
- Created By: Select this option to sort by the users who created subject areas.
- Created Date: Select this option to sort by created date.
- **Modified By**: Select this option to sort by the users who modified subject areas.
- Modified Date: Select this to sort by the modified date.

## **Managing Projects**

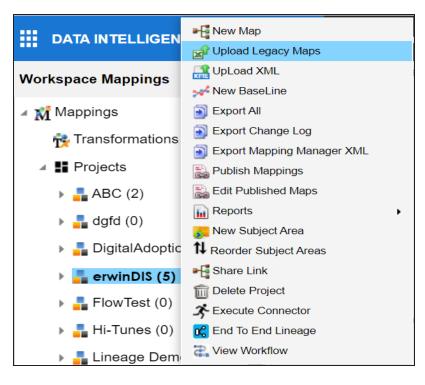
Managing projects involves:

- Uploading legacy maps
- Export mappings
- Export change logs
- Viewing reports
- Sharing links
- Deleting projects
- Viewing workflows

To manage projects follow these steps:

1. In the **Workspace Mappings** pane, right-click a project.

The available options appear.



### 2. Use the following options:

### **Upload Legacy Maps**

Use this option to upload maps in the XLSX format. Ensure that you use the required template.

### **Export All**

Use this option to download the required maps in a project.

### **Export Change Log**

Use this option to download change logs of all the maps in a project.

### Reports

Use this option to download various reports related to a project.

### Share Link

Use this option to share link of a project with your team members.

### **Delete Project**

Use this option to delete a project.

### **View Workflow**

Use this option to view workflow status of a project.

## **Defining Transformations**

Transformations specify rules that derive values from source columns to get the required values in target columns. You can define enterprise-level and project-level transformations. These transformations can be used as business rules and extended business rule transformations in mapping specifications. Ensure that you define transformations for the same ETL option as that of your mapping project.

To define transformations, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, click any one of the following:
  - **Transformations node**: Click this option to define enterprise-level transformations.
  - **Transformations node under a project**: Click this option to define project-level transformations.

For example, if you click the Transformations node, then the Transformation Details page appears.

Workspace Mappings 🛛 👻	Transformation Details			🌣 🛨 🔶 合 觉		
🔺 就 Mappings						
Transformations  Projects  A_Project (0)	#	Transformation Name	SSIS Pseudocode	Informatica Pseudocode		
<ul> <li>AdventureWorks_Migration (8)</li> <li>APJ_Demo (1)</li> </ul>						
<ul> <li>BBT (1)</li> <li>BFSI Integration (1)</li> </ul>	1	1-DataGov(HighDate:12/31/9999)		To_date(mm/dd/yyyy,12/31/9999)		
<ul> <li>Carrefour (9)</li> <li>Data Lake Migration (3)</li> </ul>	2	2-DataGov(LowDate01/01/0001)		To_date(mm/dd/yyyy, 01/01/0001)		
<ul> <li>Edw (2)</li> <li>ERP (2)</li> </ul>	3	3-DataGov(AverageChurn)		Count(active customers)/(Count o Cancelled Customers for current month)		

### 3. Click 🛨.

The Transformation Rule Editor page appears.

### **Defining Transformations**

🙀 Transformation Rule Editor		_ 🗆 X
		lii ×
Published	OFF	
Transformation Name*		
Scope	All Projects	-
ETL Option	SSIS Pseudocode	-
Pseudocode	ON         Replace Transformation Name with Pseudocode           1         1	
	Note: Press 'Ctrl + Space' to select Transformations	
Intended Use		

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

Field Name	Description		
Published	Switch <b>Published</b> on (.) to publish the transformation.		
Transformation Name	Specifies a unique name of the transformation.		
Industry industry industry	For example, ASCII.		
	Specifies the projects to which the transformation can be		
Scope	applied.		
	For example, All Projects.		
	Specifies the ETL option.		
ETL Option	For example, Informatica Pseudocode.		

**Defining Transformations** 

Field Name	Description		
	You can <u>configure ETL option list</u> and add or remove an ETL		
	option from the list.		
Replace Transformation	Switch Replace Transformation Name with Pseudocode on (		
Name with Pseudocode	(In the transformation name with pseudocode.		
	Specifies the pseudocode for the transformation.		
Pseudocode	Enter a pseudocode or use Ctrl + Space keys to select a pseudocode.		
	For example, To_date(mm/dd/yyyy,1231,9999).		
Intended Use	Specifies the objective of the transformation.		
	For example: Data governance rule - use on projects.		

## 5. Click 💾.

A new transformation is added on the Transformations Details page.

You can upload transformations in bulk using an MS Excel file.

Once a transformation is defined, you can manage it using the options available on rightclicking the transformation. <u>Managing Transformations</u> involves:

- Editing transformations
- Running impact analysis
- Viewing history

## **Configuring Transformation Library**

You can create transformations for the following ETL options:

- DataStage Pseudocode
- BODS Pseudocode
- SSIS Pseudocode
- Informatica Pseudocode
- ODI Pseudocode
- Talend Pseudocode

This ETL options list forms the Transformation Library and is configurable. You can add or remove an ETL option from the ETL options list.

To configure transformation library, follow these steps:

1. In the **Workspace Mappings** pane, click the **Transformations** node.

The Transformation Details page appears.

Tra	Transformation Details								
*	Transformation Name	BODS Pseudocode	SSIS Pseudocode	Informatica Pseudocode	ODI Pseudocode	Talend Pseudocode			
1	1-DataGov(HighDate:12/31/9999)			To_date(mm/dd/yyyy,12/31/9999)		*			
2	2-DataGov(LowDate01/01/0001)			To_date(mm/dd/yyyy, 01/01/0001)					
3	3-DataGov(AverageChurn)			Count(active customers)/(Count of Cancelled Customers for current month)					

### 2. Click 🔯.

The ETL Settings page appears.

**Configuring Transformation Library** 

ETL Setti	ngs _ 🗆 ×
	Save Cancel
Select E	TL to add to Transformation Library
OFF	DataStage Pseudocode
OFF	BODS Pseudocode
	Talend Pseudocode
	ODI Pseudocode
	SSIS Pseudocode
	Informatica Pseudocode
	ecting an ETL tool will add the ability to define psuedocode specific to the ETL tool in I transformation library

3. Switch an **<ETL\_Option>** key to **ON** to add the corresponding ETL option to the Transformation Library.

For example, switch **BODS Pseudocode** to **ON** to add BODS Pseudocode to the Transformation Library.

4. Click Save.

ETL options are added to the ETL Option list.

### **Configuring Transformation Library**

Transformation Rule E	ditor	_ ¤ ×
Published	OFF	
Transformation Name*		
Scope	All Projects	-
ETL Option	BODS Pseudocode	-
	BODS Pseudocode	
Desuderede	SSIS Pseudocode	
Pseudocode	Informatica Pseudocode	
	ODI Pseudocode	
	Talend Pseudocode	
	Note: Press 'Ctrl + Space' to select Transformations	
Intended Use		

## **Uploading Transformations**

You can upload transformations in bulk using an MS Excel file. You can either use an existing MS Excel file or a template to upload transformations. Ensure that the MS Excel file follows the correct template.

To upload transformations, follow these steps:

1. In the **Workspace Mappings** pane, click the **Transformations** node.

The Transformation Details page appears.

Trai	iransformation Details							
#	Transformation Name	Intended Use	Scope					
1	1-DataGov(HighDate:12/31/9999)	To_date(mm/dd/yyyy,12/31/9999)	DataGovernance rule - use on all projects	All Projects				
2	2-DataGov(LowDate01/01/0001)	To_date(mm/dd/yyyy, 01/01/0001)	DataGovernance rule - use on all projects	All Projects				

2. Click 👚

The Upload Transformations page appears.

Upload Transformations	- 🗆 ×
Drag-n-Drop files here or click to select files for upload.	

3. Drag and drop or use 😑 to browse and select the MS Excel file.

You can use a template to upload transformations. For more information on downloading templates, refer to the <u>Downloading Templates</u> section.

4. Click 🛍.

The file is uploaded, and transformations are added to the Transformation Details page.

### **Downloading Templates**

To download templates, follow these steps:

1. In the **Workspace Mappings** pane, right-click the **Transformations** node.

Workspace Mappings 🛛 👻	Transformation Details			
Mappings Transformations	# Transformation Name			
Projects Download Te A_Project (1)				
<ul> <li>AdventureWorks_Migration (8)</li> <li>APJ_Demo (1)</li> </ul>	1 1-DataGov(HighDate:12/31/9999)			
<ul> <li>BBT (1)</li> <li>BFSI Integration (1)</li> </ul>	2 2-DataGov(LowDate01/01/0001)			
🕨 <mark>-</mark> Carrefour (9)				

2. Click **Download Template**.

The template is downloaded in the XLSX format. You can update the MS Excel file with the required transformations.

Managing transformations involves:

- Editing transformations
- Deleting transformations
- Running impact analysis
- Viewing history

To manage transformations, follow these steps:

1. In the **Workspace Mappings** pane, click the **Transformations** node.

The Transformation Details page appears.

Trar	fransformation Details									
*	Transformation Name	BODS Pseudocode	SSIS Pseudocode	Informatica Pseudocode	ODI Pseudocode	Talend Pseudocode				
1	1-DataGov(HighDate:12/31/9999)			To_date(mm/dd/yyyy,12/31/9999)						
2	2-DataGov(LowDate01/01/0001)			To_date(mm/dd/yyyy, 01/01/0001)						
3	3-DataGov(AverageChurn)			Count(active customers)/(Count of Cancelled Customers for current month)						

2. Select the required row and right-click it.

The available options appear.

Transformation Details					
#	Transformation Na	me	BODS Pseudocode		SSIS Pseudocode
51					
32	FIRST				
33	FLOOR	Edit Transfor	rmation Details		
34	FV	impact And	alysis Report 🔹		
35	GET_DATE_PART				

3. Use the following options:

#### **Edit Transformation Details**

Use this option to edit transformation details, such as transformation name and its scope.

#### Delete

Use this option to delete the selected transformation.



If a transformation is already used in a Mapping Specification, it is still visible under it. However, it is not available for future use.

#### **Impact Analysis Report**

Hover over Impact Analysis Report and use the following options to view impact analysis of transformations:

Default Search: Use this option to view the impact analysis report of the selected transformation.

Advanced Search: Use this option to select multiple transformations and view their impact analysis report.

For example, the following image displays the impact analysis of a transformation.

Adv	vanced Search	1				- 🗆	×
В	usiness Rule:	LOWER	•			×	
Imp	act Analysis R	Report					
#	Project Name		Mapping Name	Map Specification Version	Business Rule		
1	<u>TestData Map</u>		HeteroMultiSrc_Lookup_BR	1.0	LOWER(#1)		•
2	<u>TestData Map</u>		HeteroMultiSrc_Lookup_BR	1.0	LOWER(#1)		
3	<u>TestData Map</u>		HomoMultiSrc_Lookup_BR_	1.0	LOWER(#1)		
4	<u>TestData Map</u>		HomoMultiSrc_Lookup_BR_	1.0	LOWER(#1)		
5	<u>TestData Map</u>		MultiSource_Lookup_BusRu	1.0	LOWER(#1)		
6	<u>TestData Map</u>		SingleSource_Lookup_BusF	1.0	LOWER(#1)		
7	Lineage Demo		Account_Tableau_Report	1.0	LOWER(%1)		

### History

Use this option to view activity logs of a transformation.

For example, the following image displays the history of a transformation.

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

## **Creating Maps**

You can create maps under a project or subject area. You can perform source to target mappings and create mapping specifications in maps. These mapping specifications facilitate your data integration project.

To create maps, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a project or subject area.

#### **Creating Maps**

erwin Data Intelligence **Mapping Manager** • Workspace Mappings **Project Summary Project Name** # Mappings Real Transformations Projects age Demo ABC (3) 📲 New Map 🕨 📲 batter (( 🔊 Upload Legacy Maps UpLoad XML Source 🕨 🔒 Del (0) 📌 New BaseLine DigitalA 🛐 Export All Data Map erwinDI Export Change Log Export Mapping Manager XML ffgg (2) 🚵 Publish Mappings Мар FlowTes 🚵 Edit Published Maps Reports 🕨 📲 Hi-Tune • tfixTrial <u>5</u> New Subject Area 🕨 📲 Lineage Reorder Subject Areas Project 📲 Share Link tfixIntegration 🛅 Delete Project project 🕉 Execute Connector Project 💦 End To End Lineage 📲 Tech Pu 2 View Workflow TechPubs 8 TechPubs (6)

#### For example, when you right-click a project the available options appear.

#### 3. Click New Map.

The Create a New Mapping page appears.

**Creating Maps** 

Create a New Mapping			_ @ <b>X</b>
Sync Targ Job Name	Version 1.1 abel Irce Metadata () get Metadata () e XRef		
Mail Com	ments	Ψ	Self Help
		Proceed with Auto Map	Finish Cancel

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

Field Name	Description
	Specifies the mapping specification name.
Mapping	For example, EDW_PROD_IDS_Benefits_Detail.
Name	For more information on naming conventions, refer to the <u>Best</u>
	Practices section.
	Specifies the version of the mapping specification.
ManningVor	This field is autopopulated.
Mapping Ver-	For example, 1.00.
51011	For more information on configuring version display of maps, refer to
	the <u>Configuring Version Display</u> topic.
Sync Source	Specifies whether source metadata syncs with the mapping.

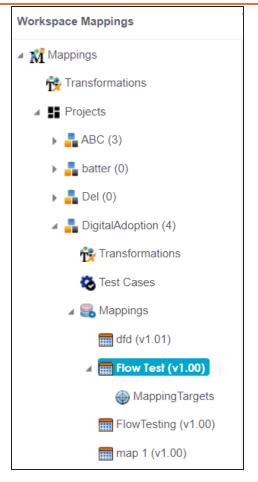
**Creating Maps** 

Field Name	Description
Metadata	Switch Sync Source Metadata to ON to sync source metadata with the
	mapping.
Sync Target	Specifies whether target metadata syncs with the mapping.
Metadata	Switch Sync Target Metadata to ON to sync target metadata with the
	mapping.
Mapping	Specifies the description of the mapping.
Description	For example: This is a map between EDW source and IDS target sys-
Beschption	tems.
	Specifies the mail comments, which can be sent to the project users
	through an email notification.
Mail Com-	For example: Source and target have identical columns, hence they
ments	can be mapped using auto-map technique.
	For more information on configuring notifications, refer to the Con-
	figuring Notifications topic.

### 5. Click Finish or Proceed with Auto Map.

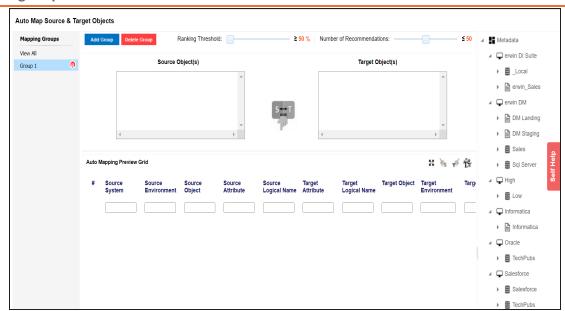
When you click Finish, a map is created and saved in the mappings tree. You can create a mapping specification under the map using <u>drag and drop method</u> or <u>graphical</u> <u>design</u>.

#### **Creating Maps**



When you click Proceed with Auto Map, you can <u>create mapping specification using</u> <u>auto-map technique</u>.

**Creating Maps** 



Also, You can assign one or multiple tags to maps. For more information on tagging maps, refer to the <u>Tagging Maps</u> topic.

# **Drag and Drop**

You can map source metadata with target metadata and create mapping specifications using the drag and drop method. This method is useful even when source column names are different from target column names. After mapping source to target, you can set a <u>target</u> <u>update strategy</u> for the mappings and enter a description for the strategy.

You can drag and drop tables or columns into the mapping specifications using one of the following:

- Metadata Search View
- Metadata Tree View

### **Creating Mapping Specifications using Metadata Search View**

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

1. In the **Workspace Mappings** pane, click a map.

By default, the Mapping Specification tab opens.

۰ 2	Mapping Specificatio	on Graphica	5	est Specification	Workflow Log	Profiles	Mapping_Design	ner_Profil 🔻 🔯	la 👫 🗟 <	•
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Nullable Flag	Ta E1 Va

2. Click 🜌.

The Mapping Specification grid switches to edit mode.

You can use the Metadata Search View pane to drag and drop the required source table or column into the Mapping Specification grid. The Metadata Search View pane displays technical assets in a hierarchical manner similar to the Metadata Manager.

Drag and Drop

Metadata Tree ViewQMetadata Search ViewQMetadataSystemsSearcherwin DI Suite>erwin DM>High Tower>Informatica>Oracle>Salesforce>SAP>Snowflake>SQL System>SQLTechPubs>TABLEUAU>To be deleted>		
Metadata   Systems   Search   erwin DI Suite   erwin DM   High Tower   Nformatica   Oracle   Salesforce   SAP   Snowflake   SQL System   SQL TechPubs   TABLEUAU   TABLEUAU	Metadata Tree View	୍ 🔺
Systems         Search         erwin DI Suite         erwin DM         High Tower         Informatica         Oracle         Salesforce         SAP         Snowflake         SQL System         SQLTechPubs         TABLEUAU         TALEND	Metadata Search View	0, 🗸
Search   erwin DI Suite   erwin DM   High Tower   Nformatica   Oracle   Salesforce   SAP   Snowflake   SQL System   SQLTechPubs   TABLEUAU   TALEND	Metadata	
erwin DI Suite>erwin DM>High Tower>Informatica>Oracle>Salesforce>SAP>Snowflake>SQL System>SQLTechPubs>TABLEUAU>TALEND>	Systems	
erwin DM>High Tower>Informatica>Oracle>Salesforce>SAP>Snowflake>SQL System>SQLTechPubs>TABLEUAU>TALEND>	Search	
High Tower>Informatica>Oracle>Salesforce>SAP>Snowflake>SQL System>SQLTechPubs>TABLEUAU>TALEND>	erwin DI Suite	>
Informatica>Oracle>Salesforce>SAP>Snowflake>SQL System>SQLTechPubs>TABLEUAU>TALEND>	erwin DM	>
Oracle>Salesforce>SAP>Snowflake>SQL System>SQLTechPubs>TABLEUAU>TALEND>	High Tower	>
Salesforce>SAP>Snowflake>SQL System>SQLTechPubs>TABLEUAU>TALEND>	Informatica	>
SAP>Snowflake>SQL System>SQLTechPubs>TABLEUAU>TALEND>	Oracle	>
Snowflake>SQL System>SQLTechPubs>TABLEUAU>TALEND>	Salesforce	>
SQL System>SQLTechPubs>TABLEUAU>TALEND>	SAP	>
SQLTechPubs>TABLEUAU>TALEND>	Snowflake	>
TABLEUAU>TALEND>	SQL System	>
TALEND >	SQLTechPubs	>
	TABLEUAU	>
To be deleted	TALEND	>
	To be deleted	>

Alternatively, click  $\bigcirc$  to open **Metadata Search** page. This page enables you to search for tables or columns in the metadata by selecting appropriate values.

Drag and Drop

_										
Meta	adata Search									
	ct System win DM	Select E	nvironment Iding	Select Table	▼ Enter C	olumn Name s	EARCH			
erwin #	n DM → DM Landir Table Name	ig → All Column Name	Table Definition	Table Comments	Logical Table Name	Logical Column Name	Column Definition			
1	Citizens	CitizenID			Citizens	CitizenID				
2	Citizens	CitizenName			Citizens	CitizenName				
3	Citizens	EmployeeID			Citizens					
4	Employees	EmployeeName			Employees	EmployeeName				
5	Employees	EmployeeID			Employees	EmployeeID				

 Expand a parent node to view its assets, and select the required asset.
 For example, open a system node to view relevant environments in it. Then, expand the environment node to view tables and columns respectively.

Drag and Drop

Metadata Search View		0	•
Metadata > erwin DI Suite erwin_Sales	>		
Tables			
Search			
dbo.RM_RESOURCE_New			
Columns			
Search			
RESOURCEID_New			
RESOURCENAME_New			
RESOURCEDESC_New			

Additionally, the search bars in the Metadata Search View enables you to search for specific environments, tables, or columns.

Hover over a table or a column and click **1** to open **Metadata Properties** page. This

page displays business, technical, and extended properties of the selected asset.

4. Drag the selected source table or column from the **Metadata Search View** pane and drop in the **Mapping Specification** grid.

Ensure that you drop source tables or columns under the respective columns.

You cannot drop source systems or environments in the Mapping Specification grid.

2 🗐 🕼	) E 🍣 🛛	[Data Integration]			Pro	ofiles: Mapping_Des	signer_Profil	o 💫 🛃 🖉 🗢	•	Metadata Tree				
e Column nents	Source Column Identity Flag	Source Column Nullable Flag	Source Percent Null Value	Source Natural Key Flag	Source Primary Key Flag	Source Logical Column	Source SDI Flag	Source SDI Source SDI	Sourc	Metadata Searc	h View			
	lucinity ring	Hullasie Flag	Hun Value	itey nag	itey nag	Column		Description		Metadata	> erwin	DM	> DM L	andin
						Account_ATM_Sta				Tables				
						Account_Cash_On				Search				
						Account_Producti		Restricted		Citizens				
										Employees				
						Cash_On_Delivery								
						Noof_Records_A		Confidential						
						l								
										Columns				
										Search				
										CitizenID				
										CitizenName	•			
										EmployeeID				

5. Similarly, drag the target table or column from the **Metadata Search View** pane and drop in the **Mapping Specification** grid.

Ensure that you drop target tables or columns under the respective columns.

6. Click 😡.

The mapping specification is saved.

### **Creating Mapping Specifications Using Metadata Tree View**

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

1. In the **Workspace Mappings** pane, click a map.

By default, the Mapping Specification tab opens.

1	Mapping Specificatio	on Graphica		est Specification	Workflow Log	Profiles:	Mapping_Design	ner_Profil 🔻 🔯	ि, 👯 🗟 < ।	
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Nullable Flag	Ta El Va

2. Click 🜌 .

You can now edit the Mapping Specification grid.

3. Drag the selected source table or column from the **Metadata Tree View** pane and drop in the **Mapping Specification** grid.

Ensure that you drop source tables or columns under the respective columns.

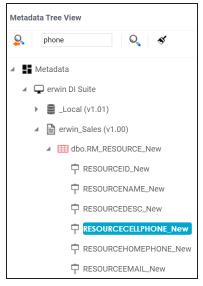


You cannot drop source systems or environments in the Mapping Specification grid.

**Drag and Drop** 

	-			v						
•	Mapping Specificat	ion Graphica	al Designer Te	st Specification	Workflow Log					
<u>i</u>		🕄 😤	ount_Tableau_Repo	<mark>prt]</mark>				Profiles:	Mapping_	Designer_Pr
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Scale		Target Co Nullable
1	TABLEAU	Presentation Layer	Account	Acct Atm Status	STRING	0	0	0		
2	Snowflake	Snowflake_STG	stg.STG_LINEITEI	N SQN_NUM	NUMBER	0				
3	Northwind_Tgt_sy	v Northwind_Tgt	dbo.Orders	ShipName	nvarchar	40	0	0		
	# 1 22	<ul> <li>APPEND 077</li> <li>Target System Name</li> <li>TABLEAU</li> <li>Snowflake</li> </ul>	Target System     Target     Name     Target     Name     Target     Name     Target     TABLEAU     Presentation     Layer	Image: Second System       Target System       Target Environment Name       Target Table Name         1       TABLEAU       Presentation Layer       Account         2       Snowflake       Snowflake_STG       stg.STG_LINEITER	Image: Second	Image: Series of the series	Image: Service of the service of th	Image: Normal state       Image: Normal state<	Image: Service of the ser	Image: Serie seri

Alternatively, click  $^{Q}$  to use the search function on the Metadata Tree View pane to locate the required asset in the list.



4. Drag the selected target table or column from the **Metadata Tree View** pane and drop in the **Mapping Specification** grid.

Ensure that you drop target tables or columns under the respective columns.

You cannot drop target systems or environments in the Mapping Specification grid. Drag and Drop

5. Click 🚾.

The mapping specification is saved.

# Setting Target Update Strategy

To set the target update strategy, follow these steps:

 Expand the Additional Mapping Information pane and click the Target Update Strategy tab.

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

2. On the Target Update Strategy tab, click 🖉.

Addi	tional Mapping Information	1		
4	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes
				li ×
0000000000	UnSpecified Insert else Update Update else Insert Insert Incremental Update Incremental Delete then Insert Delete Bulk Load	Update Strategy Description	[ ] ≣ ≣ ≣   5 [	∃ *≣ *≦ ≮

- Click the required strategy, enter Update Strategy Description, and click .
   The target update strategy is set.
- 4. Click 🚾.

The source to target mapping is saved.

You can enrich a mapping specification by:

- Adding transformation and lookup details
- Associating code cross walks (code mappings)

### Drag and Drop

- Associating reference tables
- Linking requirements

After creating a mapping specification, you can analyze a mapping specification. <u>Analyzing</u> <u>mapping specifications</u> involves:

- Generating virtual preview of target
- Previewing data
- Performing table gap analysis
- Performing column gap analysis
- Running impact analysis
- Running lineage analysis
- Running end to end lineage
- Opening business view
- Viewing mapping statistics

You can use the Graphical Designer tab to map source metadata with target metadata and create mapping specifications. This method is useful even when source column names are different from target column names. After mapping source to target, you can set a <u>target</u> <u>update strategy</u> for the mappings and enter a description for the strategy.

You can create mapping specifications in the Graphical Designer tab using one of the following:

- Metadata Search View
- Metadata Tree View

### **Creating Mapping Specifications using Metadata Search View**

To create mapping specifications graphically, follow these steps:

1. In the Workspace Mappings pane, click a map.

By default, the Mapping Specification tab opens.

•	Mapping Specificatio	on Graphica		Test Specification	Workflow Log	Profiles	Mapping_Desig	ner_Profil 🔻 🔯	G 👯 🗟 < (	•
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Nullable Flag	Ta E1 Va

2. Click the Graphical Designer tab.

The following page appears.



3. Click 🌌 .

The Graphical Designer tab switches to edit mode.

You can use the Metadata Search View pane to drag and drop the required source table or column into the Graphical Designer. The Metadata Search View pane displays technical assets in a hierarchical manner similar to the Metadata Manager.

Metadata Tree View	Q	^
Metadata Search View	Q	•
Metadata		
Systems		
Search		
erwin DI Suite	>	
erwin DM	>	
High Tower	>	
Informatica	>	
Oracle	>	
Salesforce	>	
SAP	>	
Snowflake	>	
SQL System	>	
SQLTechPubs	>	
TABLEUAU	>	
TALEND	>	
To be deleted	>	

Alternatively, click  $^{Q}$  to open **Metadata Search** page. This page enables you to search for tables or columns in the metadata by selecting appropriate values.

Meta	adata Search						
	ct System win DM	Select E	invironment nding	Select Table	▼ Enter C	olumn Name	SEARCH
erwir	$\mathbf{DM} \rightarrow \mathbf{DM}$ Landir	m Ig  ightarrow  m All					
#	Table Name	Column Name	Table Definition	Table Comments	Logical Table Name	Logical Column Name	Column Definitio
1	Citizens	CitizenID			Citizens	CitizenID	
2	Citizens	CitizenName			Citizens	CitizenName	
3	Citizens	EmployeeID			Citizens		
					Employees	EmployeeName	
4	Employees	EmployeeName			Employees	Employeentante	

Expand a parent node to view its assets, and select the required asset.
 For example, open a system node to view relevant environments in it. Then, expand

the environment node to view tables and columns respectively.

Metadata Search View	0, ▼
Metadata > erwin DI Suite > erwin_Sales	
Tables	
Search	
dbo.RM_RESOURCE_New	
Columns	
Search	
RESOURCEID_New	
RESOURCENAME_New	
RESOURCEDESC_New	

Mapping Management Guide 91

Alternatively, the search bars in the Metadata Search View enables you to search for specific environments, tables, or columns.

Hover over a table or a column and click 
to open Metadata Properties page. This page displays business, technical, and extended properties of the selected asset.

- 5. Drag the selected source table from the **Metadata Search View** pane and drop on the **Graphical Designer** tab.
- 6. On the **Graphical Designer** tab, select the source table and click **▼** next to the Auto Map option. Then, select **As Source** option to specify the table as source.

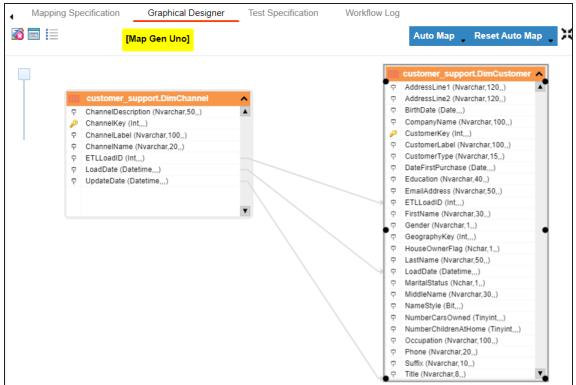
۹ <sup>N</sup>	Apping Specification	Graph	ical Designer	Test Specification	Workflow Log					
<u>i</u>		[Map Gen l	Jno]			Auto Map Reset Auto Map	. ×	Ħ	<b>_</b>	L <mark>o</mark>
_						As Source				
		/				As Target				
			customer_su	pport.DimChannel	^	Skip Existing Connections	-			
		<b>P</b>	ChannelDescrip	tion (Nvarchar,50,,)						
		2	ChannelKey (Int	t,)						
		Ŷ	ChannelLabel (N	Nvarchar, 100,,)						
		Υ	ChannelName (	Nvarchar,20,,)						
		Υ	ETLLoadID (Int,	.,)						
		Γ P	LoadDate (Date	time,,,)	•					
		Ŷ	UpdateDate (Da	atetime,,,)						
					-					

7. Similarly, drag target table from the **Metadata Search View** pane and drop on the **Graphical Designer** tab.

8. On the **Graphical Designer** tab, select the target table and click **▼** next to the Auto Map option. Then, select **As Target** to specify the table as target.

Mapping Specification	Graphical Designer Test Specification Wo	orkflow Log
<mark>ه ا</mark>	/lap Gen Uno]	Auto Map 💦 Reset Auto Map 💦 🔣
		As Source
		A.A. Torret
T		As Target
		Skip Existing Connections
	customer_support.DimChannel	customer_support.DimCustomer
	ChannelDescription (Nvarchar,50,.)	AddressLine1 (Nvarchar, 120.,)
	ChannelKey (Int)	AddressLine2 (Nvarchar, 120,)
	ChannelLabel (Nvarchar, 100,)	BirthDate (Date)     CompanyName (Nvarchar, 100)
	ChannelName (Nvarchar, 20,.)	CustomerKey (Int)
	ETLLoadID (Int,)	Customerkey (int,)  CustomerLabel (Nvarchar, 100,)
	P LoadDate (Datetime)	CustomerType (Nvarchar, 100)     CustomerType (Nvarchar, 15)
	UpdateDate (Datetime,)	DateFirstPurchase (Date)
		<ul> <li>Education (Nvarchar, 40,)</li> </ul>
		EmailAddress (Nvarchar, 50,)
		9 ETLLoadID (int)
		FirstName (Nvarchar, 30)
		Gender (Nvarchar, 1,.)
		GeographyKey (Int)
		P HouseOwnerFlag (Nchar, 1.,)
		P LastName (Nvarchar,50,.)
		P LoadDate (Datetime)
		P MaritalStatus (Nchar, 1,)
		MiddleName (Nvarchar, 30,.)
		P NameStyle (Bit,)
		P NumberCarsOwned (Tinyint,)
		P NumberChildrenAtHome (Tinyint,)
		P Occupation (Nvarchar, 100,)
		Phone (Nvarchar, 20,.)
		Suffix (Nvarchar, 10,,)
		P Title (Nvarchar,8,,)

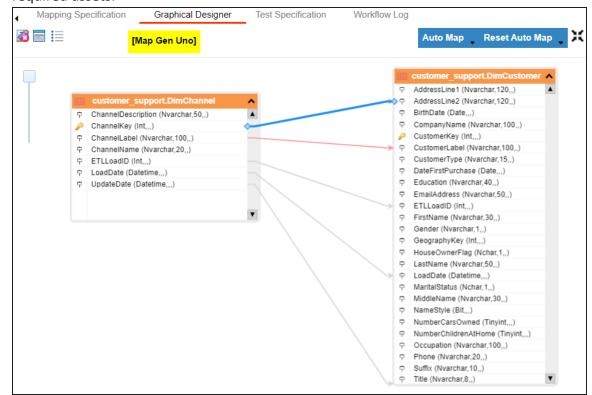
- 9. Use the following options to map source with target:
  - If the source and target have same column names, click Auto Map.



The source and target columns are mapped.

If the source and target have different column names, then click and drag your mouse from a source column to the required target column.

The source and target columns are mapped. Repeat the process for the required assets.



10. Click 🚾.

The mapping specification is saved.

### **Creating Mapping Specifications using Metadata Tree View**

To create mapping specifications graphically, follow these steps:

1. In the Workspace Mappings pane, click a map.

By default, the Mapping Specification tab opens.

**Graphical Designer** 

·	oping Specificatio	on Graphical		st Specification	Workflow Log	Profiles	: Mapping_Design	ner_Profil 🔻 🔯	G, 👫 🔊 <	•
	Farget System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Nullable Flag	Ta E Va

2. Click the Graphical Designer tab.

The following page appears.

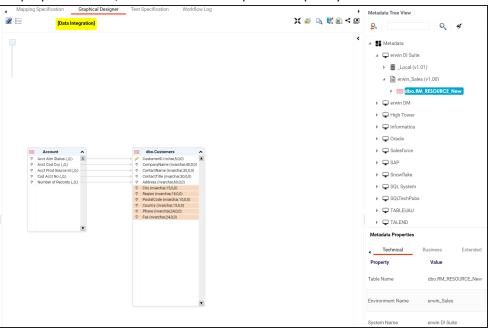
<ul> <li>▲</li> </ul>	lapping Specification	Graphical Designer	Test Specification	Workflow Log	
2	[Map (	Gen Uno]			ж
U					

- 3. Click 🜌.
- 4. Drag the selected source table from the **Metadata Tree View** pane and drop on the **Graphical Designer** tab.

Alternatively, click  $^{Q_{s}}$  to use the search function on the Metadata Tree View pane to

locate the required asset in the list. **Metadata Tree View** Q Q phone Ś 📕 Metadata 4 🔺 🖵 erwin DI Suite Local (v1.01) ⊧ erwin\_Sales (v1.00) dbo.RM\_RESOURCE\_New **P** RESOURCEID\_New **P** RESOURCENAME\_New ➡ RESOURCEDESC\_New RESOURCECELLPHONE\_New ➡ RESOURCEEMAIL\_New

5. On the **Graphical Designer** tab, select the source table and click ■ next to the Auto Map option. Then, select **As Source** option to specify the table as source.



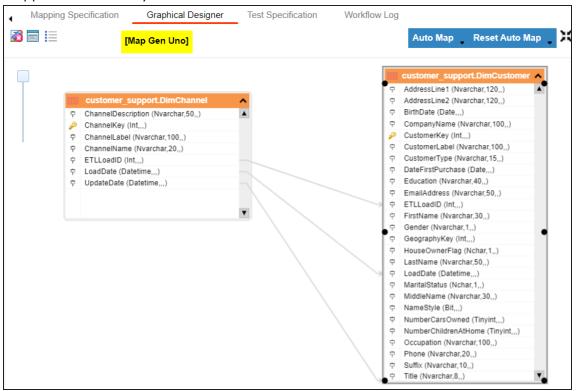
6. Drag the selected target table from the **Metadata Tree View** pane and drop on the **Graphical Designer** tab.

7. On the **Graphical Designer** tab, select the target table and click **▼** next to the Auto Map option. Then, select **As Target** to specify the table as target.

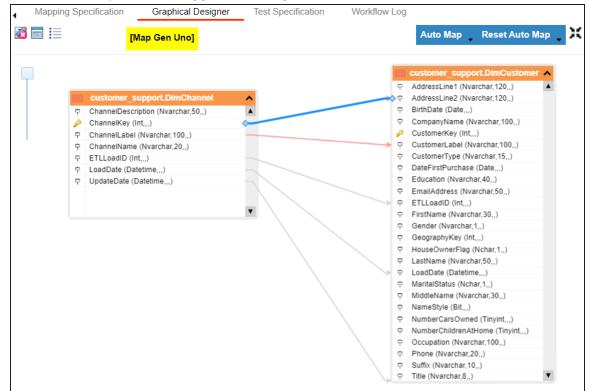
<ul> <li>Mapping Specification</li> </ul>	Graphical Designer Test Specification Workflo	/w Log
	Map Gen Uno]	Auto Map 📄 Reset Auto Map 🛛 💥 🖬
		As Source
		As Target
		As larget
		Skip Existing Connections
	customer_support.DimChannel	AddressLine1 (Nvarchar, 120.)
	P ChannelDescription (Nvarchar,50,)	AddressLine1 (Nvarchar, 120,,)     AddressLine2 (Nvarchar, 120,,)
	ChannelKey (Int)	BithDate (Date)
	ChannelLabel (Nvarchar, 100,)	CompanyName (Nvarchar, 100)
	ChannelName (Nvarchar, 20.,)	CustomerKey (Int)
	P ETLLoadID (Int,)	CustomerLabel (Nvarchar, 100)
	P LoadDate (Datetime)	CustomerType (Nvarchar, 15)
	UpdateDate (Datetime,)	DateFirstPurchase (Date)
		Education (Nvarchar,40)
		EmailAddress (Nvarchar,50,.)
		ETLLoadID (Int)
		FirstName (Nvarchar, 30)
		Gender (Nvarchar, 1)
		GeographyKey (Int)
		P HouseOwnerFlag (Nchar, 1,)
		P LastName (Nvarchar, 50,.)
		P LoadDate (Datetime)
		P MaritalStatus (Nohar,1,)
		MiddleName (Nvarchar, 30,.)
		P NameStyle (Bit)
		NumberCarsOwned (Tinyint)
		NumberChildrenAtHome (Tinyint,)
		Occupation (Nvarchar, 100,.)
		Phone (Nvarchar, 20)
		Suffix (Nvarohar,10,.)
		P Title (Nvarchar, 8)

- 8. Use the following options to map source with target:
  - If the source and target have same column names, click Auto Map.

For example, the following image displays the source and target columns are mapped automatically.



If the source and target have different column names, then click and drag your mouse from a source column to the required target column. For example, the following image displays the source and target columns (blue and red arrows) that are mapped manually.



9. Click 🚾.

The mapping specification is saved.

### Setting Target Update Strategy

To set the target update strategy, follow these steps:

 Expand the Additional Mapping Information pane and click the Target Update Strategy tab.

This pane is available at bottom of the central pane when you click a map in the Graphical Designer tab.

2. On the Target Update Strategy tab, click **2**.

ddit	ional Mapping Information			
	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes
_		Update Strategy Description		Ľ ×
•	UnSpecified Insert else Update Update else Insert	а <u>А</u> <u>н</u> в <i>и</i>	<b>₽ ₹ ₹ ■</b> }£ !}	: *≣ *≣ ≮
	Insert Incremental Update			
ŏ	Incremental			
0	Delete then Insert			
0	Delete			
0	Bulk Load			
0	Other			

3. Click the required strategy, enter **Update Strategy Description**, and click

The target update strategy is set for the mapping specification.

4. Click 😡.

The source to target mapping is saved.

You can enrich a mapping specification by:

- Adding transformation and lookup details
- Associating code cross walks (code mappings)
- Associating reference tables
- Linking requirements

After creating a mapping specification, you can analyze a mapping specification. <u>Analyzing</u> <u>mapping specifications</u> involves:

- Generating virtual preview of target
- Previewing data
- Performing table gap analysis
- Performing column gap analysis
- Running impact analysis

- Running lineage analysis
- Running end to end lineage
- Opening business view
- Viewing mapping statistics

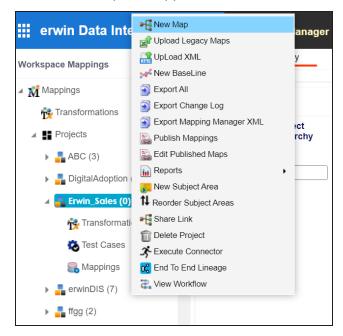
Starting erwin Data Intelligence (erwin DI) v13.1, you can use the auto-map feature to create mapping specifications even when source and target column names do not match. With this feature, you can view recommended matches for a source column and select the most appropriate target column.

### **Creating Mapping Specifications**

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

1. In the **Workspace Mappings** pane, right-click a project or subject area.

The available options appear.



2. Click New Map.

The Create New Mapping page appears.

Create a New Mapping	_ 🖻 🗙
Mapping Name* Mapping Version Version Label Sync Source Metadata Sync Target Metadata Job Name XRef Mapping Description  Mail Comments	Self Help
Proceed with Au	o Map Finish Cancel

- 3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. For field description, refer to the <u>Creating Maps</u> topic.
- 4. Click Proceed with Auto Map.

The Auto Map Source & Target Objects page appears.

Drag the target table from the Metadata pane and drop it in the Target Object(s) box.
 You can add more than one target tables.

View All   Group 1     Source Object(s)     Target Object(s)     Target Object(s)     Target Object Target     Target Object Target     Target Object Target Object Target System     Total     Recommendations     Target Object Target Object Target System     Total     Recommendations     Target Object Target System     Target Object Target Object Target Target System     Total     Recommendations     Target Object Target Object Target Target System     Total     Target Object Target Object Target Target Target System     Total     Target Object Target System     Target Object Target System	View All							50 % Number	of Recommenda		≤ 50	Metadata
Auto Mapping Preview Grid       Image: Source source source source source attribute attribute to the functionnent of the source so	Group 1	0		Source	e Object(s)				Tarç	get Object(s)		
Auto Mapping Preview Grid # Source Source Source Source Target Target Object Target Target System Fourionment Object Attribute Attribute Target Object Target Target System Fourionment Object Attribute			4			×	5	T		Employees	* *	<ul> <li>Perwin DM</li> <li>PHigh</li> <li>Informatica</li> <li>Oracle</li> </ul>
* System Environment Object Attribute Attribute Environment Recommendations			Auto Mapping Previ	iew Grid							8 🗞 💉 📆	-
								Target Object		Target System		

6. Drag source table from the **Metadata** pane and drop it in the **Source Object(s)** box.

Auto Map Source & Tar	get Objects			
Mapping Groups	Add Group         Delete Group         Ranking Threshold:         250 %         Number of Recommendations:         550 %	Metadata		
View All EmployeeTerritories_Em,®y	Source Object(s) Target Object(s)			
	dbo.EmployeeTerritories	▶ □ erwin DM		
	dbo.Employees	▶ ☐ High		
	Auto Mapping Preview Grid 58 🦌 🚀 🔂	QuestPayroll		
	# Source Source Source Target Target Diject Target Target System Total System Environment Object Attribute Attribute Environment Recommendations	- 111440		
		Employees EmployeeTerritorie		
		QuestPayroll		
		▶ ☐ Salesforce		

You can add more than one source tables.

# 7. Click 🔁.

The Auto Mapping Preview Grid displays a list of recommended matches (target columns) for each source column based on maximum matching score. In case the recommended match is not suitable, you can evaluate more recommendations and assign targets manually.

Auto Map Source & Targ	get Objects						
Mapping Groups	Add Group Delete Group Ranking Threshold:	≥ 50 % Number of Recommendations: ≤ 50					
View All EmployeeTerritories_Em®y	Source Object(s)	Target Object(s)					
	dbo.EmployeeTerritories	dbo.EmployeeTerritories					
	dbo.Employees	dbo.Employees					
	•	<					
	Auto Mapping Preview Grid	sc 🍾 🎺 🛱					
	# Source Source Source Source System Environment Object Attribute	Target Target Object Target Target System Total Attribute Environment Recommendation:					
	5 QuestHR QuestPayroll dbo.Employees City	City dbo.Employees AdvancePayroll QuestPayroll 2					
	6 QuestHR QuestPayroll dbo.Employees Country	Country dbo Employees AdvancePayroll QuestPayroll 2					
	7 QuestHR QuestPayroll dbo.Employees EmployeeID	EmployeeIDNu dbo Employees AdvancePayroll QuestPayroll 3					
	Total Rows: 21   Target Tables: 2   Source Tables: 2   Targets Not Mapped:	1   Sources Not Mapped: 1					

8. Use the following options to manage the auto-map recommendations:

#### **Ranking Threshold**

Use this option to set the threshold for match scores. Matches with scores below this threshold do not appear as recommendations. By default, it is set at >= 50%, which means that matches with scores below 50% are not recommended.

#### Number of Recommendations

Use this option to limit the number of recommendations. By default, it is set to <= 50, which means that number of recommended matches cannot exceed 50.

#### Maximize (😫)

Use this option to maximize or minimize the Auto Mapping Preview Grid.

### Delete Orphan Sources ( 🍡 )

Use this option to delete source attributes that are not mapped.

### Delete Orphan Targets ( 🕶 )

Use this option to delete target attributes that are not mapped.

### 

Use this option to <u>add transformations</u> for the auto map. You can add business rule, extended business rule transformation, look up reference column, lookup on, and trans look up condition.

#### Add Group

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

### Rename Mapping Group (<sup>®</sup>)

Use this option to rename a mapping group.

#### Delete Group

Use this option to delete a mapping group. To delete a mapping group, click the mapping group and then click **Delete Group**.

#### Create a distinct Mapping for every Group

Use this option to create distinct mapping for every group.

9. Click Finish.

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

Workspace Mappings	• •	Mappin	g Specificati	on Graphica	l Designer Tes	t Specification	Workflow Log					•
dgfd (0)	•	2 🗊 🔯	■ 🍣	[Integration]					Profiles: Mappi	ng_Designer_Profil 🔻	🎗 🗟 🗱	3 < D
🕨 🚦 DigitalAdoption (4)			jet System	Target	Target Table	Target Column	Target Column	Target Column	Target Column		Target Column	Target Co
🔺 📕 Erwin_Sales (1)		Name	Environment Name	Name	Name	Data Type	Length	Precision	Scale	Nullable Flag	ETL Defa Value	
💏 Transformations	н.										_	
test Cases		1 Ques	tPayroll	AdvancePayroll	dbo.EmployeeTerr	EmployeeID	int	10	10	0		- 1
🔺 🌉 Mappings	11											
Integration (v1.00)		2 Ques	tPayroll	AdvancePayroll	dbo.EmployeeTerr	TerritoryID	nvarchar	20	0	0		
MappingTargets	L.											
🕨 📕 erwinDIS (7)	н.	3 Ques	tPayroll	AdvancePayroll	dbo.Employees	ResidentialAddres	nvarchar	60	0	0		
🕨 嚞 ffgg (2)	L'r											
🕨 📕 FlowTest (3)		4 Ques	tPayroll	AdvancePayroll	dbo.Employees	DateofBirth	datetime	23	23	3		
🕨 📕 Hi-Tunes (2)												

# **Assigning Targets Manually**

Auto-Map

In the Auto Mapping Preview Grid, the **Total Recommendations** column displays the number of mapping recommendations. To view the recommendations for required rows, click the corresponding number.

The Total Recommendations on page appears. It displays the recommended matches for the source column. By default, a match with the highest score is selected.

For example, the following image displays the recommended matches for a source column, EmployeeID.

Total Re	commen	dations on			_ <b>□</b> ×
Employ	eelD (Que	estHR -> QuestPayroll -> dbo.	Employees)		Assign As Target
Select	#	Target Attribute	Target Object	Target Environment	Target System
0	1	EmployeeID	dbo.EmployeeTerritories	AdvancePayroll	QuestPayroll
۲	2	EmployeeIDNumber	dbo.Employees	AdvancePayroll	QuestPayroll
0	3	EmployeeExtension	dbo.Employees	AdvancePayroll	QuestPayroll
					*

You can reject the default match and select another recommended match. To select a match, click the required radio button, and then click **Assign As Target**.

## Setting Target Update Strategy

To specify target update strategy, follow these steps:

1. Expand the Additional Mapping Information pane.

This pane is available at the bottom of the central pane on clicking a map in the Workspace Mappings pane.

2. Click the Target Update Strategy tab.

#### Auto-Map

Flow Test (v1.00)	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes
FlowTesting (v1.00)				
map 1 (v1.00)		Update Strategy Description		
Map Configuration (v1.	<ul> <li>UnSpecified</li> </ul>	<u>а</u> нв <i>г</i> ⊔		= t= t= 🖌
▶ ⊕ MappingTargets	<ul> <li>Insert else Update</li> <li>Update else Insert</li> </ul>			- = = •
🕨 🚦 erwinDIS (7)	<ul> <li>Insert</li> <li>Incremental Update</li> </ul>			
🕨 🚦 ffgg (2)	<ul> <li>Incremental</li> </ul>			
FlowTest (3)	<ul> <li>Delete then Insert</li> <li>Delete</li> </ul>			
🕨 🚦 Hi-Tunes (2)	O Bulk Load			

- 3. Click 🖉.
- 4. Click the required strategy, enter **Update Strategy Description**, and click

The target update strategy is configured.

## **Adding Transformations**

You can add transformations to an auto-map and specify whether it is applicable to exact match, orphan source, orphan target, or all the rows.

To add transformations in auto-maps, follow these steps:

1. Under the Auto Mapping Preview Grid, click 🔂.

The Auto Map Transformation page appears.

	uto Map Transformations					_ 🗆 ×
÷						ĽI ×
#	Кеу	Value	Exact Match	Orphan Source	Orphan Target	All

### 2. Click 🖸

A row is added to the grid.

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

4. Double-click the cell under the **Value** column and select a value.

 You can use transformations created under the Transformations node only for Business Rule. For other transformations, enter the required value.

 Auto Map Transformations

 Auto Map Transformations

 Image: Comparison of the transformation of the transformatio of the transformation of the transformation of the t

Ŧ	Key	Value	Match	Source	Orphan Target	All
1	Business Rule					
		TO_FLOAT ^ TO_INTEGER TRUNC UPPER VARIANCE //				

5. Use the following options:

### Exact Match

Use this option to apply the transformation on the exactly matched rows in the Auto Mapping Preview Grid.

### **Orphan Source**

Use this option to apply the transformation on the orphan source rows in the Auto Mapping Preview Grid.

### **Orphan Target**

Use this option to apply the transformation on the orphan target rows in the Auto Mapping Preview Grid.

### All

Use this option to apply the transformation on every row in the Auto Mapping Preview Grid.

## 6. Click

The transformations are added to the auto map.

You can enrich a mapping specification by:

Auto-Map

- Adding transformation and lookup details
- Associating code cross walks (code mappings)
- Associating reference tables
- Linking requirements

After creating a mapping specification, you can analyze a mapping specification. <u>Analyzing</u> <u>mapping specifications</u> involves:

- Generating virtual preview of target
- Previewing data
- Performing table gap analysis
- Performing column gap analysis
- Running impact analysis
- Running lineage analysis
- Running end to end lineage
- Opening business view
- Viewing mapping statistics

You can map multiple source columns to single or multiple target columns to create a mapping specification. After mapping source to target, you can set a <u>target update strategy</u> for the mappings and enter a description for the strategy.

You can create mapping specifications in the Graphical Designer tab using one of the following:

- Metadata Search View
- Metadata Tree View

## **Creating Mapping Specifications Using Metadata Search View**

To create one to many or many to many mapping specifications, follow these steps:

1. In the Workspace Mappings pane, click a map.

By default, the Mapping Specification tab opens.

۰	Mapping Specificatio	on Graphica		est Specification	Workflow Log	Profiles:	Mapping_Desig	ner_Profil 🔻 🔯	G 👯 🗃 <	•
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Nullable Flag	Ta E1 Va

2. Click 🜌 .

The Mapping Specification grid switches to edit mode.

3. Switch APPEND OFF to ON.

The append mode is enabled. You can now drop multiple columns from the Metadata Search View pane in one row of the Mapping Specification grid.

You can use the Metadata Search View pane to drag and drop the required source table or column in the Mapping Specification grid. The Metadata Search View pane displays technical assets in a hierarchical manner similar to the Metadata Manager.

Metadata Tree View	Q	•
Metadata Search View	O,	•
Metadata		
Systems		
Search		
erwin DI Suite	>	
erwin DM	>	
High Tower	>	
Informatica	>	
Oracle	>	
Salesforce	>	
SAP	>	
Snowflake	>	
SQL System	>	
SQLTechPubs	>	
TABLEUAU	>	
TALEND	>	
To be deleted	>	

Alternatively, click  $\bigcirc$  to open **Metadata Search** page. This page enables you to search for tables or columns in the metadata by selecting appropriate values.

Met	adata Search						
	ct System win DM	Select E	Environment nding	Select Table     All	▼ Enter 0	Column Name	SEARCH
erwii	n DM → DM Landir	$ng \rightarrow AII$					
#	Table Name	Column Name	Table Definition	Table Comments	Logical Table Name	Logical Column Name	Column Definition
1	Citizens	CitizenID			Citizens	CitizenID	
2	Citizens	CitizenName			Citizens	CitizenName	
3	Citizens	EmployeeID			Citizens		
4	Employees	EmployeeName			Employees	EmployeeName	

One to Many and Many to Many Mapping Specifications

Expand a parent node to view its assets, and select the required asset.
 For example, open a system node to view relevant environments in it. Then, expand

the environment node to view tables and columns respectively.

Metadata Search View	Q	•
Metadata > erwin DI Suite erwin_Sales	>	
Tables		
Search		
dbo.RM_RESOURCE_New		
Columns		
Search		
RESOURCEID_New		
RESOURCENAME_New		
RESOURCEDESC_New		

Alternatively, use the search bars in the Metadata Search View to search for specific environments, tables, or columns.

Hover over a table or a column and click to open **Metadata Properties** page. This page displays business, technical, and extended properties of the selected asset.

5. Drag one or multiple source columns from the **Metadata Search View** pane in the **Mapping Specification** grid under the **Source Columns Name** column.

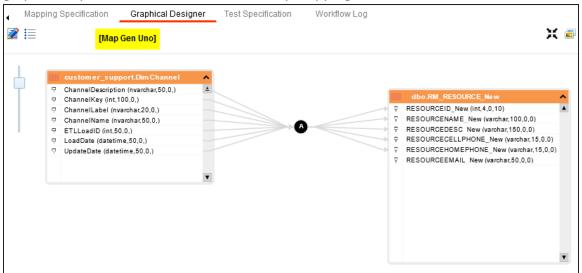
You can use the Ctrl key to select multiple columns in the Metadata Search View

Metadata Tree View Q   Metadata Search View Q   Metadata > erwin DI Suite >   _Local     Tables   Search   customer_support.DimChannel   customer_support.DimCustomer   dbo.CompareLongBinary2   dbo.CompareLongBinary2   dbo.CompareLongChar   dbo.DimAccount   dbo.DimAccount   dbo.DimAccount   Search   Columns   Search   ChannelKey   ChannelLabel   ChannelDescription	pane.							
Metadata Search View   Metadata > erwin DI Suite >   _Local     Tables   Search   customer_support.DimChannel   customer_support.DimCustomer   dbo.CompareLongBinary2   dbo.CompareLongChar   dbo.CompareLongChar2   dbo.DimAccount   dba.DimChannel   Search   Columns   Search   ChannelKey   ChannelLabel   ChannelName	Metadata Tree View	Q	^					
Local  Tables  Search  Customer_support.DimChannel  customer_support.DimCustomer  dbo.CompareLongBinary2  dbo.CompareLongChar  dbo.CompareLongChar2  dbo.DimAccount  dbo.DimAccount  Search  ChannelKey  ChannelKey  ChannelKape	Metadata Search View	Q	•					
Search         customer_support.DimChannel         customer_support.DimCustomer         dbo.CompareLongBinary         dbo.CompareLongChar         dbo.CompareLongChar2         dbo.DimAccount         dbo.DimChannel         Search         ChannelKey         ChannelLabel         ChannelName								
customer_support.DimChannel customer_support.DimCustomer dbo.CompareLongBinary dbo.CompareLongBinary2 dbo.CompareLongChar dbo.CompareLongChar2 dbo.DimAccount dbo.DimAccount dbo.DimChannel <b>Columns</b> Search ChannelKey ChannelLabel ChannelName	Tables							
customer_support.DimCustomer dbo.CompareLongBinary dbo.CompareLongChary2 dbo.CompareLongChar2 dbo.DimAccount dbo.DimAccount dbo.DimChannel Search ChannelKey ChannelLabel ChannelName	Search							
dbo.CompareLongBinary dbo.CompareLongChary dbo.CompareLongChar2 dbo.DimAccount dbo.DimAccount dbo.DimChannel Search ChannelKey ChannelLabel ChannelName	customer_support.DimChannel							
dbo.CompareLongBinary2 dbo.CompareLongChar dbo.CompareLongChar2 dbo.DimAccount dbo.DimChannel channelKey ChannelLabel ChannelName	customer_support.DimCustomer							
dbo.CompareLongChar dbo.CompareLongChar2 dbo.DimAccount dbo.DimChonnel <b>Columns</b> Search ChannelKey ChannelLabel ChannelName	dbo.CompareLongBinary	dbo.CompareLongBinary						
dbo.CompareLongChar2   dbo.DimAccount   dbo.DimChannel   Search   ChannelKey   ChannelLabel   ChannelName	dbo.CompareLongBinary2	dbo.CompareLongBinary2						
dbo.DimAccount dbo.DimChannel Columns Search ChannelKey ChannelLabel ChannelName	dbo.CompareLongChar							
Columns Search ChannelKey ChannelLabel ChannelName	dbo.CompareLongChar2							
Columns Search ChannelKey ChannelLabel ChannelName	dbo.DimAccount							
Search ChannelKey ChannelLabel ChannelName	dha DimChannal							
ChannelKey ChannelLabel ChannelName	Columns							
ChannelLabel	Search							
ChannelName	ChannelKey							
	ChannelLabel							
ChannelDescription	ChannelName							
	ChannelDescription							

- 6. Similarly, drag single or multiple target columns from **Metadata Search View** in **Mapping Specification** under the **Target Columns Name**.
- 7. Click 🔜.

The mapping specification is saved.

You can view the mapping specification on the **Graphical Designer** tab to view the graphical representation of the one to many mappings.



## **Creating Mapping Specifications Using Metadata Tree View**

To create one to many or many to many mapping specifications, follow these steps:

1. In the **Workspace Mappings** pane, click a map.

By default, the Mapping Specification tab opens.

· —	Mapping Specificati	on Graphica [Map Configu	-	st Specification	Workflow Log	Profiles	Mapping_Desig	ner_Profil 🔻 🛱	Do 👯 🗟 <	•
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Nullable Flag	Ti E V

2. Click 🜌.

3. Switch APPEND OFF to ON.

The append mode is enabled. You can now drop multiple columns from the Metadata Tree View pane in one row of the Mapping Specification grid.

4. Drag one or multiple source columns from the **Metadata Tree View** pane in the **Mapping Specification** grid under the **Source Columns Name** column.

You can use the Ctrl key to select multiple columns in the Metadata Tree View pane.

_ ۱	Mapping Specification	Graphical Designe	r Test Specifi	cation Worki	flow Log			+	Met
- <u>6</u>	APPEND 077 🔁	[Account_Table	eau_Report]	Profiles	Mapping_Design	er_Profil 🔻 🔯	Da 👫 🗟 妃	d 🗙 😸 📷	
ion	Source System Name		Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Source Column Precision	Source Colun Scale	n _
						0		•	
						0			
						0			
						0			

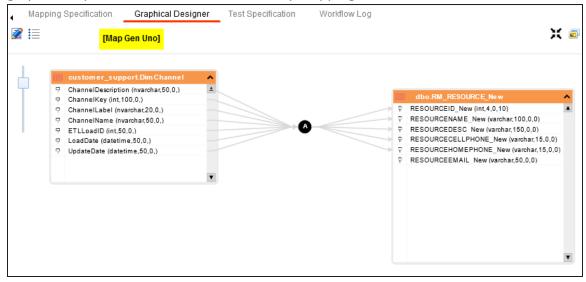
Alternatively, click  $^{Q_{s}}$  to use the search function on the Metadata Tree View pane to

locate the required asset in the list.
Metadata Tree View
ዿ phone 🔍 💰
▲ ■ Metadata
🖌 🖵 erwin DI Suite
E _Local (v1.01)
erwin_Sales (v1.00)
dbo.RM_RESOURCE_New
RESOURCEID_New
RESOURCENAME_New
RESOURCEDESC_New
RESOURCEHOMEPHONE_New
RESOURCEEMAIL_New

- 5. Similarly, drag single or multiple target columns from **Metadata Tree View** in **Mapping Specification** under the **Target Columns Name**.
- 6. Click 🔜.

The mapping specification is saved.

You can view the mapping specification on the **Graphical Designer** tab to view the graphical representation of the one to many mappings.



### Setting Target Update Strategy

To set target update strategy, follow these steps:

- 1. Expand the Additional Mapping Information pane and click the Target Update Strategy tab.
- 2. On the Target Update Strategy tab, click 🖉.

•	Map Spec Overview	S	ourc	e Extr	act S	QL	_	Targe	et Up	date	Strate	egy	Tes	sting No	otes		Ma	p Spe	c Doc
		Updat	e Stra	itegy E	)escrip	otion											×		
•	UnSpecified	1	Α	н	в	7	п	=	≡	=	=	±=	:= te	∎ <b>*</b> ≣					
0	Insert else Update	•				-	2	_	-		_	3-	•		•				
0	Update else Insert															-			
$\circ$	Insert																		
$\circ$	Incremental Update																		
0	Incremental																		
0	Delete then Insert																		
0	Delete																		
0	Bulk Load															-			
0	Other																		

3. Click the required strategy, enter **Update Strategy Description**, and click

4. Click 🚾.

The source to target mapping is saved.

You can enrich a mapping specification by:

- Adding transformation and lookup details
- Associating code cross walks (code mappings)
- Associating reference tables
- Linking requirements

After creating a mapping specification, you can analyze a mapping specification. <u>Analyzing</u> <u>mapping specifications</u> involves:

- Generating virtual preview of target
- Previewing data
- Performing table gap analysis
- Performing column gap analysis
- Running impact analysis
- Running lineage analysis
- Running end to end lineage
- Opening business view
- Viewing mapping statistics

You can add transformation and lookup details to a mapping specification in the Mapping Specification grid.

Adding transformation details involves setting up:

- Business rule
- Extended business rule transformation

Ensure that you define business rules under the Transformations node for the same ETL Option as the Project ETL. For more information on defining business rules, refer to the <u>Defining Transformations</u> section.

Adding lookup details involves setting up:

- Trans lookup condition
- Lookup reference column
- Lookup on

Ensure that you scan the required table in the Metadata Manager to set trans lookup condition.

## **Adding Transformation Details**

To add business rules to mapping specifications, follow these steps:

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

By default, it opens the Mapping Specification tab.

Workspace Mappings	•		Mapping Specifica	tion Graph	ical Designer	Test Specification	Workflow Lo	g		ł
Mappings Register Transformations	^	2	🗏 🔯 🔳 🍣 (In	tegration]			Profiles: Profi	le_ABC	🔽 🕸 🗟 😫	S < D
<ul> <li>Projects</li> <li>Data Lake Migration (3)</li> <li>EDW (3)</li> </ul>		#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Colu Scale
<ul> <li>ERP (2)</li> <li>Erwin_Project (4)</li> <li>Erwin_Sales (1)</li> <li>Transformations</li> <li>Test Cases</li> </ul>		1	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEID_New	int	4	10	0
A      Mappings     A     MappingTargets		2	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	100	0	0
<ul> <li>Leter (2)</li> <li>IQVIA (1)</li> <li>New_Project (3)</li> </ul>		3	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEDESC_N	varchar	150	0	0

3. Right-click the header menu of the Mapping Specification grid.

•	Mapping Specifico	ation Grap	hical Designer	Test Specific	ation Workfl	ow Log	
2	🗏 🔯 🔳 🍣 (Ir	🔽 🕸 💫 👯 🗟 < 🗵					
#	Source System Name	Source Environment Name	Source Table Name	Source Colu Name	Source Colu Data Type Source Table Nar	Length	Business Rule
1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEIE	Source Column N Source Column D Source Column L	Data Type	Í
2	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEN	☑ Business Rule ☑ Extended Busines ☑ Target System Ni	ss Rule Transformatic ame	
3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDE	SC varchar	150	

4. Select the **Business Rule** check box.

The Business Rule column is now available in the Mapping Specification grid.

5. Click 🜌.

You can now edit the Mapping Specification grid.

Double-click the cell under the **Business rule** column for the required source column.
 The available transformations appear.

<u>۸</u>	apping Specification	Graphico	l Designer To	est Specification	Workflow Log					
<u>iii</u> =	APPEND 077	[Integration]		Profiles:	: Default 💽 🔯 🏹 🛒 🗟 🐻 🐻 😢 < 🖉					
nment	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	Extended Business Rule Transformation				
ion	dbo.RM_RESOURC	RESOURCEID	int	4	1					
ion	dbo.RM_RESOURC	RESOURCENAME	varchar	100	1-DataGov(HighDate:12/31/9999) ^ 2-DataGov(LowDate01/01/0001) 3-DataGov(AverageChurn) ABORT					
ion	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	ABS ADD_TO_DATE					
ion	dbo.RM_RESOURC	RESOURCECELLPH	varchar	15						

7. Select a business rule.

You can add business rules for multiple source columns.

8. Click 🚾.

The business rules are added to the mapping specification.

To add extended business rule transformations, follow these steps:

1. Right-click the header menu of the Mapping Specification grid.

- ا	Mapping Specifico	ation Grap	hical Designer	Test Specific	ation Workf	low Log	Þ
23	🗏 🔯 🔳 🍣 [Ir	- \$ 🗟 👫 🛛 < 🗖					
#	Source System Name	Source Environment Name	Source Table Name	Source Col Name	umn Source Col Data Type	Length	¬
1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESCORCEIL	Source Column M Source Column D Source Column D	Data Type	~
2	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEN	Business Rule Extended Busine Target System N	ess Rule Transformatic	,
3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCED	ESC varchar	150	

2. Select the Extended Business Rule Transformation check box.

The Extended Business Rule Transformation column is now available in the Mapping Specification grid.

3. Click 2.

You can now edit the Mapping Specification grid.

4. Click 📃

The available options appear.

Workspace Mappings	Mapping Specification Graphical Designer
B_Project (2)	<ul> <li>APPEND OFF</li> <li>[Integration]</li> </ul>
BBT (1)     BFSI Integration     Carrefour (9)	Business Rule
	Extended Business Rule
A Construction A Cons	ts 2 Erwin_Sales_Targe Integration_Targe dbo.RM_RESOURC

- 5. Select the **Extended Business Rule** check box.
- 6. In the **Mapping Specification** grid, double-click the cell under the **Extended Business** rule Transformation column for the required source column.

The Extended Transformation Rule Editor page appears.



7. Select a pseudocode based on the Project ETL.

For example, if the Project ETL is Informatica then select Informatica Pseudocode.

Extended Transformation Rule Editor	_ = ×
on off Replace Transformation Name with Pseudocode	Informatica Pseudocode 🔽 🙀 💾 🗙
1	BODS Pseudocode
±	Talend Pseudocode
	SSIS Pseudocode
	ODI Pseudocode
	Informatica Pseudocode

8. Press Ctrl + Space keys.

The available transformations appear.

Extended Transformation Rule Editor		_ ¤ ×
on off Replace Transformation Name w	ith Pseudocode	Informatica Pseudocode 🔽 🙀 💾 🔀
1 1 1 2-DataGov(HighDate:12/31/9999) 2-DataGov(LowDate01/01/0001) 3-DataGov(AverageChurn) ABORT ABS ADD_TO_DATE AES_DECRYPT ASCII AVG CEIL CHOOSE CHR CHRCODE COMPRESS CONCAT CONVERT_BASE COS V	1-DataGov(HighDate:12/31/9999) Pseudocode: To_date(mm/dd/yyyy,12/31/9999) Intended Use Description: DataGovernance rule - on all projects	use

If the required transformation is not available in the list, use  $\mathbf{\hat{r}}$  to create and update the transformations list.

9. Double-click the required transformation.

You can use **must** to replace the transformation name with the pseudocode.

10. Click

The extended business rule transformation is added to the source column. You can add extended business rule transformation to multiple source columns. You can also

configure UI labels for user defined fields. For more information on configuring UI labels, refer to the <u>Configuring Language Settings</u> topic.

## Adding Lookup Details

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

- 1. Right-click the header menu of the mapping specification grid.
- 2. Select Lookup Reference Column, Lookup On, and Trans Lookup Condition.

4 Map	ping Specification	Graphical	Designer Te	est Specification Workflow Log		,
<u>í</u> 🗐 🛃		[Integration]		Profiles: Default	) 🗟 👫 🗟 🖬 🐻 😣	< 🛛
te Column e	Source Column Data Type	Source Column Length	Business Rule	Extended Business Rule	Target System Name	Target Enviro Name
JRCEID	int	4	FLOOR	Lookup Reference Column  Lookup On  Trans Lookup Condition	Erwin_Sales_Targe	Integr
JRCENAME	varchar	100	REVERSE	Source Column Precision Source Column Scale Source Column DB Default Value	Erwin_Sales_Targe	Integr
JRCEDESC	varchar	150			Erwin_Sales_Targe	Integr

3. Drag the required table from the **Metadata Tree View** pane and drop it under the **Trans Lookup Condition** column for the required source column.

APPEND 057	CalesforceIn	tegration]	Profiles: M	apping_Designer_Pr	ofil 🔻 🔯 🗟	K 🖻 🖬 🔤 🗵	< [
(up Reference Column	Lookup On	Trans Lookup Condition	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Sou Data
actName	ContactName	SELECT ContactName FROM dbo.Customers WHERE ContactName = APPQ0SSYS.WLM_CLASSIFIER_PLA	Oracle	TechPubs	APPQOSSYS.WLN	OPER	NUM
actName	ContactName	SELECT ContactName FROM dbo.Customers WHERE ContactName = APPQ0SSYS.WLM_CLASSIFIER_PLA	Oracle	TechPubs	APPQOSSYS.WLN	NCLSRS	NUM
actTitle	ContactTitle	SELECT ContactTitle FROM dbo.Customers WHERE ContactTitle = APPQ0SSYS.WLM_CLASSIFIER_PLA	Oracle	TechPubs	APPQOSSYS.WLM	CLPCSTR	VAR
288	Address	SELECT Address FROM dbo.Customers WHERE Address = APPQOSSYS.WLM_CLASSIFIER_PLA	Oracle	TechPubs	APPQOSSYS.WLN	ACTIVE	СНА
		dbo.RM_RESOURCE_N	Oracle	TechPubs	APPQOSSYS.WLM	SEQNO	NUM

A SQL query populates.

Once trans lookup condition is set for the source column, you can add lookup reference column and lookup on.

To add lookup reference column, double-click the cell under the **Lookup Reference Column** column and select the required option.

۰.	Mapping Spec	ification G	aphical Designer Test S	Specification	Workflow Log			۰,
1	APPEND	orr 🎅 [Integro	tion]	Profiles:	Default	🔽 🕸 🗟	🛯 🖬 📾 🙁	< 🗖
۱n	Created By	Created Date	Lookup Reference Column	Lookup On		Trans Lookup Condition	Last Modified By	Last N Date 1
	Administrator	2020-01-12 20:40:27.5	1			SELECT ID, SOURCE_OBJECT_ SOURCE_OBJECT_ TARGET_OBJECT_1 TARGET_OBJECT_1 RELATIONSHIP_DE FROM dbo.ADS_ASSOCI.	Administrator	2020 12:2
	Administrator	2020-01-12 20:40:27.5	ID SOURCE_OBJECT_ID SOURCE_OBJECT_TYPE_I TARGET_OBJECT_ID				Administrator	2020 12:2
	Administrator	2020-01-12 20:40:27.5	TARGET_OBJECT_TYPE_IE RELATIONSHIP_DETAIL_ID < >				Administrator	2020 20:4

To add lookup on, double-click the cell under the **Lookup On** column and select the required option.

•	Mapping Speci	ification Gr	aphical Designer Test	Specification Workflow Log			•
×.	APPEND	ा 🥹 [Integra	tion]	Profiles: Default	🔹 🕸 🗟 ី	🛛 🖬 🖬 😣	< 🗖
۱n	Created By	Created Date	Lookup Reference Column	Lookup On	Trans Lookup Condition	Last Modified By	Last M Date 1
	Administrator	2020-01-12 20:40:27.5	ID		SELECT ID, SOURCE_OBJECT_ SOURCE_OBJECT_I TARGET_OBJECT_I TARGET_OBJECT_I RELATIONSHIP_DET FROM dbo.ADS_ASSOCI	Administrator	2020 12:2
	Administrator	2020-01-12 20:40:27.5		ID A SOURCE_OBJECT_ID SOURCE_OBJECT_TYPE_ID TARGET_OBJECT_ID		Administrator	2020 12:2
	Administrator	2020-01-12 20:40:27.5		TARGET_OBJECT_TYPE_ID RELATIONSHIP_DETAIL_ID ~		Administrator	2020 20:4

4. Click 😡.

The lookup details are added in the Mapping Specification. You can add lookup details for multiple source columns.

Alternately, you can add transformation and lookup details to a mapping specification graphically. For more information about adding transformation and lookup details graphically, refer to the <u>Graphical Designer</u> topic.

## **Graphical Designer**

You can add transformation and lookup details to a mapping specification on the Graphical Designer tab.

Adding transformation details involves setting up:

- Business rule
- Extended business rule transformation

Ensure that you define business rules under the Transformations node for the same ETL Option as the Project ETL. For more information on defining business rules, refer to the <u>Defining Transformations</u> section.

Adding lookup details involves setting up:

- Trans lookup condition
- Lookup reference column
- Lookup on

Ensure that you scan the required table in the Metadata Manager to set trans lookup condition.

## **Adding Transformation Details**

To add business rules graphically, follow these steps:

- 1. Click the **Graphical Designer** tab.
- 2. Click 🜌.

You can now edit the mapping specification graphically.

- 3. Click the mapping link of the required column and expand the Properties pane.
- 4. Expand the Transformation Details pane.

### **Graphical Designer**

Map	ping Specification	Graphical Designer	Test Specification	Workflo	ow Log		,
8 🖬 🗄	=	[Integration]	Auto Map	Reset Aut	to Map 💦 🗮 🗐	) 🗟 👫 🔊 🖬 🐻 < (	2
Π					Properties	<b>±</b>	>
Щ					Source Details		-
	dbo.RM RESOUR				Target Details		ľ
	-			dbo.RA RESOURC	Transformation Details		k
				RESOURC	Properties	Value	
	RESOURCEDESC (var	char,150,0,0)		RESOURC		Value	
		NE (varchar, 15, 0, 0)		RESOURC	Business Rule		
	RESOURCEHOMEPHO	DNE (varchar,15,0,0)	> 1	RESOURC	Extended Business Rule	Ð	
0	RESOURCEEMAIL (va		<b>_</b>	RESOURC	Transformation		
		▼					
					Lookup Details		
							1
					User Defined Details		ľ
					Miscellaneous Details		

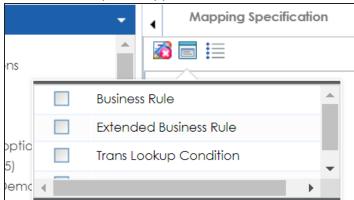
- 5. Double-click the **Value** cell for **Business Rule** and select the required value.
- 6. Click 🔜.

The business rule is added to the mapping link. You can add business rules for multiple mapping links.

To add extended business rule transformations graphically, follow these steps:

1. On the Graphical Designer tab, Click 🥅

The available options appear.



2. Select the Extended Business Rule check box.

### **Graphical Designer**

3. Click the mapping link of the required column and expand the **Transformation Details** pane.

N	Napping Specification	Graphical Designer	Test Specification	Workflo	ow Log		,
8	ŧ	[Integration]	Auto Map	Reset Aut	to Map 🚬 💥 📰 📼	i 🙇 👯 🖻 🖬 🚾	< 🛛
Π					Properties		👱 >
Щ					Source Details		
T					Target Details		<b>^</b>
	dbo.RM_RESOUR RESOURCEID (int,4,0)			dbo.RA RESOURC	Transformation Details		
U				RESOURC	Properties	Value	
	RESOURCEDESC (va     RESOURCECELLPHO	· · · · · · · · · · · · · · · · · · ·		RESOURC	Business Rule		
	RESOURCEHOMEPH	ONE (varchar,15,0,0)		RESOURC	Extended Business Rule Transformation	9	
	RESOURCEEMAIL (vo	archar,50,0,0)		RESOURC	Tarisionnalion		
					Lookup Details		
					User Defined Details		
					Miscellaneous Details		

4. Double-click the Value cell for Extended Business Rule Transformation.

The Extended Transformation Rule Editor page appears.

Extended Transformation Rule Editor							
on off Replace Transformation Name with Pseudocode	Informatica Pseudocode 🔽 🙀 💾 🗙						
1							

5. Select the pseudocode based on the Project ETL.

For example, if the Project ETL is Informatica then select Informatica Pseudocode.

**Graphical Designer** 

Extended Transformation Rule Editor	_ = ×
on off Replace Transformation Name with Pseudocode	Informatica Pseudocode 🔽 🙀 💾 🗙
1	BODS Pseudocode
	Talend Pseudocode
	SSIS Pseudocode
	ODI Pseudocode
	Informatica Pseudocode

6. Press Ctrl + Space keys.

The available transformations appear.

Extended Transformation Rule Editor			_ 🗆 ×
on off Replace Transformation Name wi	th Pseudocode	Informatica Pseudocode 💌 🙀	Ľ ×
1 1 1 2-DataGov(HighDate:12/31/9999) 2-DataGov(LowDate01/01/0001) 3-DataGov(AverageChurn) ABORT ABS ADD_T0_DATE AES_DECRYPT ASCTI AVG CEIL CHOOSE CHR CHRCODE COMVERT_BASE COS V	1-DataGov(HighDate:12/31/9999) Pseudocode: To_date(mm/dd/yyyy,12/31/9999) Intended Use Description: DataGovernance rule on all projects	e - use	

 ${f P}$  If the required transformation is not available in the list, use  ${f ar k}$  to create and update the transformations list.

7. Double-click the required transformation.

You can use mu to replace transformation name with pseudocode.

8. Click 💾.

The extended business rule transformation is added to the mapping link. You can add extended business rule transformations to multiple mapping links.

### **Adding Lookup Details**

To add lookup details graphically, follow these steps:

- 1. On the **Graphical Designer** tab, click the mapping link of the required column and expand the **Properties** pane.
- 2. Expand the Lookup Details pane.

Mapping Specification     Graphical Desig	Test Specification Work	low Log	Metadata Catalogue 🔍
👔 🗐 🏥 [Integration]	Auto Map Reset A	uto Map 🚬 💥 🖬 🗐 🗞 👯 🗟 🐻 🐻 < (	Image: State
η		Properties 👱	AdventureWorks     AdventureWorks
<u></u> Ц		Source Details	<ul> <li>Atlas Sales System</li> </ul>
		Target Details	▶ 🗐 BI
dbo.RM_RESOURCE	dbo.R		BO Reports
RESOURCEID (int,4,0,10)	RESOUR	Transformation Details	<ul> <li>Eustomer Order Entry</li> </ul>
RESOURCENAME (varchar, 100, 0, 0)	RESOUR	Lookup Details	Data Lake
RESOURCEDESC (varchar, 150,0,0)	RESOUR		Data Models
RESOURCECELLPHONE (varchar, 15,0,0)	RESOUR	4 7	▶ ■EDW
RESOURCEHOMEPHONE (varchar, 15,0,0)	RESOUR	: Lookup Reference	Erwin_Sales
RESOURCEEMAIL (varchar, 50, 0, 0)	RESOUR	Column	▲ ■Integration (v1.00) ♦ ■ dbo.RM_RESOURCI
		Lookup On	Balintegration_Target (v1
		Trans Lookup Condition	Erwin_Sales_Target
			∠ anger ∠ anger ∠ anger ∠ anger ∠ anger ∠ anger
			▶ ∎erwinDIS
			JDEdwards
			New_Erwin
		User Defined Details	
		Miscellaneous Details	🔺 Metadata Properties 🛛 📙 💐

3. Drag the required table from the **Metadata Tree View** pane and drop it for **Trans Lookup Condition**.

Mapping Specification Graphical Designer     SalesforceIntegration	Test Specification Workflow	Log	¥	, 2 > 🗟 🎇 🔊 🖻	Metadata Tree View
SalesforceIntegration]			~ ~		🔺 📲 Metadata
<b></b>			Properties	≛ >	🔺 🖵 erwin DI Suite
			Source Details	•	<ul> <li>Local (v1.01)</li> <li>erwin_Sales (v1.00)</li> </ul>
			Target Details	•	dbo.RM_RESOURCE_New
	APPQOSSYS.WLM_CLASSIFIER_PLAN     OPER (number.0.)     VELSES (number.0.)		Transformation Details	•	🕨 🖵 erwin DM
	************************************		Lookup Details	-	<ul> <li>High Tower</li> <li>Informatica</li> </ul>
		BillingCity (string,0.0)     BillingCity (string,0.0)     BillingCode (string,0.0)     BillingCountry (string,0.0)	Properties	Value	Oracle
		BillingLatitude (decimal,0,0)     BillingLongtude (decimal,0,0)     BillingLongtude (decimal,0,0)     BillingLatidexes (address,0,0)	c .	SELECT ContactName	<ul> <li>Salesforce</li> </ul>
		ShippingStreet (textarea,0,0)     ShippingCty (string,0,0)     ShippingState (string,0,0)     ShippingState (string,0,0)     ShippingState(string,0,0)	Trans Lookup Condition W	WHERE ContactName =	▶ 🖵 SAP
		Φ         ShippingCountry (string,0,0)           Φ         ShippingLatitude (decimal,0,0)           Φ         ShippingLatitude (decimal,0,0)           Φ         ShippingLatitude (decimal,0,0)	•		Snowflake
		ChippingGeocodeAccuracy (picklist,0,0)     ShippingGeocodeAccuracy (picklist,0,0)     ShippingAddress (address,0,0)     Phone (phone,0,0)	User Defined Details	-	🕨 📮 SQL System
		P Fax (phone_0.0)			SQLTechPubs
			Miscellaneous Details	-	TABLEUAU

Once trans lookup condition is set, you can add lookup reference column and lookup on.

To add lookup reference column, double-click the cell for **Lookup Reference Column** and select the required option.

<ul> <li>Mapping Specification</li> </ul>	Graphical Designer	Test Specification	Workflow Log							
	[Data Integration]						Auto Map Rese	t Auto Map	🕂 🗮 🖻 🖻	👯 🗟 🖬 🐻 < 🗷
<b>P</b>									Properties	
									Source Details	
									Target Details	•
									Transformation Details	•
									Lookup Details	-
									Properties	Value
									Lookup Reference Column	
									Lookup On	10
				Account         Acc           7         Acct Adm Status (A)         Adm Status (A)           7         Acct Adm Status (A)         Acct Adm Status (A)           7         Acct Adm Status (A)         Acct Adm Status (A)           7         Number of Records (A)         Adm	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	dbo.Customers         Customerl(0) (nchw3,00)         Customerl(0) (nchw3,00)         Customerl(0) (nchw3,00,0)         Customerl(0) (nchw3,00,0)         Customerl(0) (nchw3,00,0)         Address (nchw3,00,0)         Customerl(0) (nchw3,00,0)         Fat (nchw3,00,0)         Fat (nchw3,00,0)         Fat (nchw3,00,0)         Fat (nchw3,00,0)         Customerl(0) (nchw3,00,0)         Fat (nchw3,00,0)         Customerl(0) (nchw3,00,0)			Trans Lookup Conditior	RESOURCEID_New RESOURCENAME_New RESOURCEDES_C.New RESOURCECELLPHON RESOURCECELLPHON RESOURCEEMAIL_New FROM dbo.RM.RESOURCE_N WHERE ID = Account_Acct Atm Status

To add lookup on, double-click the cell against **Lookup On** and select the required option.

4. Click 🐻.

The lookup details are added to the mapping specification. You can add lookup details for multiple mapping links.

# **Updating Mapping Specifications Manually**

After creating a mapping specification, you can update the mapping specification manually. However, we recommend that you use the manual method case by case on exception basis.

To update mapping specifications manually, follow these steps:

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

By default, it opens the Mapping Specification tab.

Workspace Mappings	· •	Mapping Specifico	tion Graph	ical Designer	Test Specification	Workflow	log		•
Mappings Representations	^	🗐 🔯 🗏 췮 (In	tegration]			Profiles: P	rofile_ABC	🔻 🗘 🗓	< 🛛 🕹
Projects     Carrefour (9)     Data Lake Migration (3)	#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Colum Data Type	n Target Column Length	Target Column Precision	Target Colu Scale
<ul> <li>EDW (3)</li> <li>ERP (2)</li> <li>Erwin_Project (4)</li> <li>Erwin_Sales (1)</li> </ul>		1 Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEID_New	int	4	10	0
rtransformations Test Cases ✓ State Cases ✓ State Mappings		2 Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	100	0	0
MappingTargets           Image: The second se		3 Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEDESC_N	varchar	150	0	0

## 3. Click 🜌.

You can now edit the Mapping Specification grid.

4. Select a row (use Ctrl key to select multiple rows) and right-click the cell.

•	Mapping Specifica	tion Graph	ical Designer	Test Specification	Workflow Lo	g		1
		[Integration]	]	Profi	les: Profile_ABC	•	🗘 🗟 👬 🗟 🖥	1 🗟 😣 < 🖻
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Colu Length	umn Target Column Precision	Target Column Scale
1	Erwin_Sales_Targe	Integration_Target	dbo.RM_RESOURC	RESOURCEID_New	int	4	10	0
2	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	100	i Uncheck All Rows Clear Source Detail Clear Target Details	
3	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEDESC_N	varchar	150	Clear Source & Tarç Clear Cell Oleete Row(s)	get Details
<		≪	ecords from 1 to 7	) K K	Page 1 💡 📄 1	00 rows per ,	Extended Propertie:	5

**Updating Mapping Specifications Manually** 

5. Use the following options:

### **Check All Rows**

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



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

### **Uncheck All Rows**

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

### **Clear Source Details**

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

### **Clear Target Details**

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

### Clear Source & Target Details

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

### Clear Cell

Use this option to clear the cell.

### Delete Row(s)

Use this option to delete the selected rows.

### **Extended Properties**

Use this option to configure Extended Properties.

### Share Link

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

To update cell values, double-click a cell and update its values.

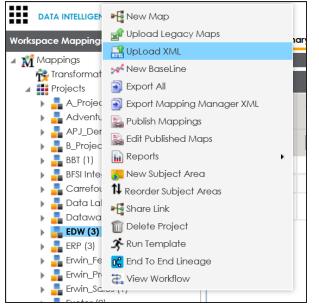
•	Mapping Specifica	<b>ition</b> Graph	nical Designer	Test Specification	Workflow Lo	og		•
		🛛 🎅 [Integration	1]	Profiles:	Profile_ABC	- 🔅 [	à 🔣 🛛 🖉	8 < 🗵
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Colu Scale
1	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEID_New	int	4	10	0
2	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCENAME_	varchar	4		
3	Erwin_Sales_Targe	Integration_Targe	dbo.RM_RESOURC	RESOURCEDESC_N	varchar			

## **Uploading Mapping Specifications in XML**

You can upload a mapping specification to a project in the XML format. You can either use an existing XML file or export it from a suitable project. Ensure that the XML file follows the correct template. For more information on exporting a mapping specification in XML, refer to the <u>Proprietary XML Format</u> topic.

To upload mapping specifications in the XML format, follow these steps:

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



3. Click Upload XML.

The Upload Mapping Manager XML page appears.

**Uploading Mapping Specifications in XML** 

Upload Mapping Manager XML	_ 🗆 ×
	1 🗙
Drag-n-Drop files here or click to select files for upload.	
Mail Comments Enter Mail Comments.	
Note: Uploading XML will reset workflow status of Ma to initial stage	pping

4. Drag and drop or use 😑 to browse and select the XML file.

The Upload Mapping Manager XML page appears.

🗖 Upload Mapping Manager XML		_ 🗆 ×
		(1) 🗙
Erwin_Project_Erwi	n_Map_1.07.xml (	100% 😣
Mail Comments		
Enter Mail Comments. Note: Uploading XML will reset workflow status of Mapping to initial stage		

**Uploading Mapping Specifications in XML** 

5. Enter Mail Comments and click 1.

The Mapping Specification is uploaded successfully.

If you have enabled notifications, project users receive notification emails and mail comments from the administrator's email ID. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.

## **Specifying XPath in Mapping Specifications**

Xpath is a potential path expression in XML documents. Hence, if you have imported source or target metadata from XSD files then it is important to specify Xpath. You can specify Xpath in a mapping specification for source and target columns.

To specify Xpath in mapping specifications, follow these steps:

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

Workspace Mappings	.∎ Ma	apping Specificat	tion Graphica	I Designer Tes	st Specification	Workflow Log			×
📻 erwinSalesIntegration (v1 🔺	20	I 🔯 🗉 🍣	[XSD_Map]			Profiles: Map	ping_Designer_Profi	🔽 🏟 🗟	n < 🛛
🎆 ff (v1.00)	#	Target System		Target Table		Target	Target	Target	Target
SalesforceIntegration (v1		Name	Environment Name Name		Column Name	Column Data Type	Column Length	Column Precision	Column Sc
📻 TechPubsBUgTrial (v1.00									*
🔺 🥅 XSD_Map (v1.00)	1	XSD	School_Data	Employee	Employee LastName s		string		
MappingTargets									_
Fingent Corp (0)	2	XSD	School_Data	Employee FirstNar	FirstName	string			
FlowTest (1)									
▶ 嚞 Hi-Tunes (0)	3	XSD	School Data	Employee Title	Title	string			
▶ <mark>-</mark> Lineage Demo (14)	Ū		Dura Dura						

By default, it opens the Mapping Specification tab.

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

<b>ا</b> ۲	Maj	pping Specificat	ion Graphical	Designer	Test Specification	Workflow	Log				F
	٠	📚 🗉 🍣	[XSD_Map]			Profiles:	Марр	ping_Designer_Profil	- 🏟 🗟	👯 🔊 <	×
#		Target System Name	Target Environment Name	Target Tab Name	le Target Target Primary Key F	-	•	Target Column Length	Target Column Precision	Target Colum	
	1	XSD	School_Data	Employee	<ul> <li>Target SDI Flag</li> <li>Target SDI Description</li> <li>Target XPath</li> <li>Target Table Class</li> </ul>	on					•
	2	XSD	School_Data	Employee	Target Table Alias     Target Column Class     Target Column Alias		•				
	3	XSD	School_Data	Employee	Title	string					

Specifying XPath in Mapping Specifications

The Target XPath and Source XPath columns are now visible in the Mapping Specification grid.

- 4. Click 🜌.
- 5. Double-click cells under the **Target XPath** and **Source XPath** columns to enter the required XPath.
- 6. Click 😡.

The Xpath is specified in the Mapping Specification.

<b>ا</b> ۲	Mapping Specif	ication Graphic	cal Designer	Test Specification	Workflow L	og		•
2	🗐 🔯 🗏 🍣	[XSD_Map]		Profile	es: Mapping_De	signer_Profil 🔻 🔯	i iliga 🥰 📓 <	◄
me	Target Column Data Type	Target XPath	Source Environment Name	Source Table Name	Source Column Name	Source XPath	Last Modified By	La Da
	string	./northwind/Empl	School_Data	Order	ShipPostalCode	./northwind/Orde	Administrator	2
	string	./northwind/Empl	School_Data	Order	ShipName	./northwind/Orde	Administrator	2 1
	string	./northwind/Empl	School_Data	Order	ShipCountry	./northwind/Orde	Administrator	2 1
	string	./northwind/Empl	School_Data	Order	ShipCity	./northwind/Orde	Administrator	2 1
	string	./northwind/Empl	School_Data	Order	ShipAddress	./northwind/Orde	Administrator	2 1

# **Setting Column Order and Visibility**

You can set the column order and visibility in Mapping Specifications and personalize the Mapping Specification grid. This helps you work efficiently.

## **Column Order**

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

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

By default, th	e Mapping	Specification	tab opens.
----------------	-----------	---------------	------------

Workspace Mappings 🔹 👻		Mapping Specifico	ition Graph	ical Designer	Test Specification	Workflow Lo	g	•
Mappings	2	🗉 🔯 🔳 🍣 (Er	win_Map]		Profiles:	Default	- 🗘 [	ò, 👫 🛛 < 🗵
Projects     Garrefour (9)     Garda Lake Migration (3)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>BOD Core Inigration (c)</li> <li>BOD (2)</li> <li>BERP (2)</li> <li>Erwin_Project (2)</li> </ul>	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	ID	bigint	8	ABS
<ul> <li>Transformations</li> <li>Test Cases</li> <li>Mappings</li> </ul>	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	bigint	8	ABS
Erwin_Map (v1.00) MappingTargets K_New_Mapping (v1.	3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	bigint	8	ABS

3. Click the required column header, drag and drop the column at the required place.

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

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

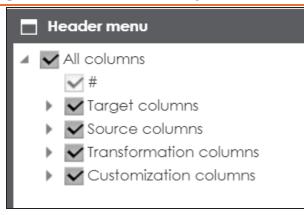
## **Column Visibility**

To set the column visibility, follow these steps:

1. In the Mapping Specification grid, click **E**.

The Header Menu page appears.

Setting Column Order and Visibility



- 2. Expand the respective nodes.
- 3. Select the required columns.



4. Close the **Header Menu** page.

The selected columns are visible in the Mapping Specification grid.

To reset column ordering and visibility click 🐼.

# **Updating Additional Mapping Information**

You can update additional mapping information in the Additional Mapping Information pane with respect to the following tabs:

Tab	Description					
	Under this, you can update the following for a mapping specification:					
	Specification name					
Map Spec	Version label					
Overview	State name and sub-state name					
	Source and target metadata sync					
	Job Name XRef					
	Under this, you can update:					
Source Extract	SQL Query relevant to a mapping specification					
<u>SQL</u>	SQL Query Description					
Target Update	Under this, you can set your target update strategy as per your data integ-					
Strategy	ration requirements.					
Testing Notes	Under this, you can add relevant testing notes with respect to a mapping specification.					
Map Specs						
Docs	Under this, you can upload relevant documents.					
Assignment	Under this, you can assign a mapping specification to multiple users.					
Specification	Under this, you can link additional specification artifacts relevant to a map-					
<u>Artifacts</u>	ping specification.					
Level of Effort	Under this, you can record planned level of effort and actual level of effort in					
	creating mapping and ETL process.					
Change Log	This tab can be enabled in <u>Mapping Manager Settings</u> . Under this, you can capture change logs of a mapping specification.					
Poloaco						
Release Information	Under this, you can view release information of a mapping.					
My Action	Under this, you can collaborate with other users on a task.					

**Updating Additional Mapping Information** 

Tab	Description
<u>Center</u>	
User Defined	There are five user defined tabs that can be used by you with your own $\underline{\sf UI}$
Tabs (1-5)	labels.
Extended	Under this, you can extend properties of a mapping specification by creating
Properties	custom forms.

To access the Additional Mapping Information pane, follow these steps:

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

The central pane displays the Mapping Specification grid. The Additional Mapping Information pane is available at the bottom of the central pane.

•	Ма	pping Specificat	tion Graphica	I Designer Test	t Specification	Workflow Log				Þ
2	ē.	i 🔯 🗉 🍣	[BugTrial]			Profile	es: Mapping_Des	igner_Profil 🔻 🔯	I 🐚 👫 🗐 <	
#		Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Ti C N
	1	SQLTechPubs	SQLTechPubs	dbo.Categories	CategoryID	int	4	10	0	
	2	SQLTechPubs	SQLTechPubs	dbo.Categories	CategoryName	nvarchar	15	0	0	
	3	SQLTechPubs	SQLTechPubs	dbo.Categories	Description	ntext	16	0	0	
	4	SQLTechPubs	SQLTechPubs	dbo.Categories	Picture	image	16	0	0	
(		_								
				ecords from 1 to 4	ŧ >>⊢ []	Page 1	100 rows per pag	je		
٨dd	liti	onal Mapping I	nformation							`
		Map Spec Over	view So	ource Extract SQ	L Target l	Jpdate Strategy	Testing No	otes M	ap Spec Docs	•
										Ļ

3. Click the Additional Mapping Information pane.

You can use  $\blacktriangleleft$  or  $\blacktriangleright$  to navigate across the pane.

**Updating Additional Mapping Information** 

1	Map	oping Specificati	on Grap	hical Desigr	er Test	Specification	Workflow Log					Þ
	2 💷	🔯 🗉 🍣	[BugTrial	]			Profile	s: Mapping	g_Designer_Profil 🔻	<b>\$</b> [	🛓 👯 🔊 <	
-	#	Target System Name	Target Environm Name		t Table	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision		ärget olumn Scale	Tai e Co Nu
4												÷
			I< <	Records f	om 1 to 4	> > ()	Page 1	100 rows pe	er page			
A	dditio	onal Mapping Ir	nformation	I								~
4	1	Map Spec Overv	view	Source Ex	tract SQ	L Target L	pdate Strategy	Testir	ng Notes	Map S	Spec Docs	×
										<b>&gt;</b>		
	Map Io	đ		98		Wo	rkflow Status	Preliminary I	Draft			
	Specif	fication Name		BugTrial								
	Map S	Specification Versio	n	1.00								
	Versio	n Label										
	State	Name		Approved		Sul	State Name					
	Sync	Source Metadata		OFF		Syr	nc Target Metadata	OFF	)			
	Job N	ame XRef								-		

# **Updating Map Spec Overview**

You can update the Map Spec Overview tab and update various aspects of a mapping specification that includes:

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

To update the Map Spec Overview tab, follow these steps:

1. In the **Additional Mapping Information** pane, on the **Map Spec Overview** tab, click

## **Updating Map Spec Overview**

Additional Mapping Information	on		•
Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes
Map Id	98	Workflow Status	Preliminary Draft
Specification Name	BugTrial		
Map Specification Version	1.00		
Version Label			
State Name	Approved	✓ Sub State Name	Select 🗸
Sync Source Metadata	ON	Sync Target Metadata	
Job Name XRef			
Mapping Description		⊻ ≣ ≣ ≣ ■	j= i= '≡ <b>≼</b>
	Testing for a bug logged by (	Ą	
			~
Assigned To			
Created By	Administrator	Created Date Time	2020-06-08 10:24:06.843
Modified By	Administrator	Modified Date Time	2021-04-22 08:11:29.353

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

Field Name	Description
	Specifies the mapping specification name.
Specification	For example, EDW_PROD_IDS_Benefits_Detail.
Name	For more information on naming conventions, refer to the <u>Best</u>
	Practices section.
	Specifies the version label of the mapping specification.
Version Label	For example, EDW_PROD_IDS_Benefits_Detail (Alpha).
	For more information on configuring version display of maps, refer to
	the Configuring Version Display topic.
State Name	Specifies the mapping state of the mapping specification.

Updating Map Spec Overview

Field Name	Description				
	For example, In Progress.				
	For more information on configuring mapping states, refer to the <u>Con</u> -				
	figuring Mapping State Settings topic.				
	Specifies the sub-state of the mapping specification.				
Sub State	For example, Needs Approval.				
Name	For more information on configuring mapping sub-states, refer to the				
	Configuring Mapping State Settings topic.				
Sync Source	Switch Sync Source Metadata to <b>ON</b> to sync source metadata with the				
Metadata	mapping specification.				
Sync Target	Switch Sync Target Metadata to <b>ON</b> to sync target metadata with the				
Metadata	mapping specification.				
Job Name	Specifies the equivalent ETL mapping name.				
XRef	For example, ErwinDIS931.				
	Specifies the description for the mapping specification.				
Description	For example: This is a map between EDW source and IDS target sys-				
	tems.				

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

For more information on workflow status, refer to the <u>Managing Mapping Manager</u> <u>Workflows</u> topic.

# 3. Click 💾.

The fields on the Map Spec Overview tab are updated.

## **Updating Source Extract SQL**

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

To update source extract SQL, follow these steps:

1. In the Additional Mapping Information pane, click the Source Extract SQL tab.

### The Source Extract SQL tab appears.

Image: Second Stress System Name       Target Target Target Target Name       Target Target Target Target Column Name       Target Column Data Target Column Data Type       Target Column Precision       Target Column Arget Column Column Column Precision       Target Column Column Column Column Column Column Column Precision       Target Column Col	Scale Cc Nu
Name     Environment Name     Name     Column Name     Column Data     Column Type     Column Length     Column Precision       Image: Column Name     Column Name     Column Data     Column Precision     Column Precision     Column Precision       Image: Column Name     Column Name     Column Data     Column Precision     Column Precision       Image: Column Name     Column Name     Column Data     Column Precision     Column Precision	Scale Co NL
	•
Additional Mapping Information	
	~
Map Spec Overview Source Extract SQL Target Update Strategy Testing Notes Map Spec Do	⊳cs ►
	<b>^</b>
SQL Query	- 1
	- 1
	- 1
	- 1
SQL Query Description	
Side Query Description	

2. click 🖉.

## Updating Source Extract SQL

Additional Mapping Informa	tion			٠
▲ Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs
			Ľ ×	
SQL Query	<u>A</u> <u>H</u> B <i>I</i> <u>U</u> ≡	≣ ≣ ≣ ≣ ≣	*≣ ∢	
			*	
			•	
SQL Query Description	<u>A</u> <u>H</u> B <i>I</i> <u>U</u> ≡	≣≣≣≣≣≣	'≣ ∢	
			*	
			Ψ.	

3. Enter SQL Query and SQL Query Description.

For example:

- **SQL Query**: Select \* from dbo.RM\_Resource
- **SQL Query Description**: The query extracts the data from dbo.RM\_Resource table.
- 4. Click 💾.

The Source Extract SQL is updated.

## Setting Target Update Strategy

You can set the way target metadata is updated when you map source to target. You can update the strategy any time as per your requirement.

To set target update strategy, follow these steps:

1. In the Additional Mapping Information pane, click the Target Update Strategy tab.

Addi	Additional Mapping Information								
•	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	۱.			
					Ď				
		Update Strategy Description							
۲	UnSpecified								
0	Insert else Update								
0	Update else Insert								
0	Insert								
0	Incremental Update								
0	Incremental								
0	Delete then Insert								
0	Delete								
0	Bulk Load				•				
0	Other								

## 2. Click 🖉.

Additional Mapping Information								
•	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	•		
		Update Strategy Description			×			
	UnSpecified	<u>а</u> <u>н</u> в <i>г</i>		⊨ t≘ t≘ <b>∡</b>				
0	Insert else Update		<u> </u>	·- = = <b>v</b>				
0	Update else Insert							
0	Insert							
0	Incremental Update							
0	Incremental							
0	Delete then Insert							
0	Delete							
0	Bulk Load			-				
0	Other							

3. Click the appropriate update strategy from the options and enter **Update Strategy Description**.

For example:

- Update strategy: Insert else Update
- **Update Strategy Description**: Insert the source column value to a blank target column else update the target column value with the source column value.

# 4. Click

The Target Update Strategy is set.

# **Updating Testing Notes**

You can keep a record of testing notes related to a mapping specification and specify test results as:

- Un-specified
- Pass
- Fail
- Needs analysis

To update testing notes, follow these steps:

1. In the Additional Mapping Information pane, click the Testing Notes tab.

Addi	Additional Mapping Information									
•	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	ŀ				
		Testing Notes			-					
۲	UnSpecified				<b>▲</b>					
0	Pass									
0	Fail									
0	Needs Analysis				•					

2. Click 🖉.

Addi	tional Mapping Informat	ion				*
4	Map Spec Overview	Source Extract SQL	Target Update Strategy	Testing Notes	Map Spec Docs	×
		Testing Notes			×	
۲	UnSpecified	<u>≩ A</u> H B <i>I</i> U	<b>₽ ₹ 3 8</b> 5	E te te 🖌		
0	Pass			4		
0	Fail					
0	Needs Analysis				-	

## **Updating Testing Notes**

3. Click the appropriate option for test results and enter **Testing Notes**.

For example:

- Test results: Pass
- **Testing Notes**: The mapping specification passed the testing and it is ready for the ETL process.
- 4. Click 💾.

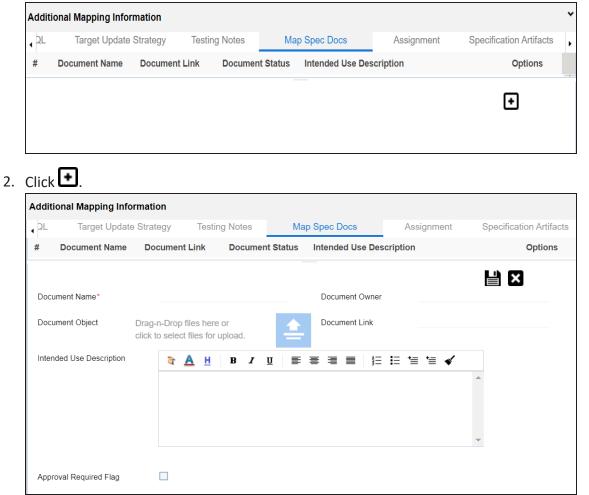
The Testing Notes are updated.

# **Adding Mapping Specification Documents**

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

To upload mapping specification documents, follow these steps:

1. In the Additional Mapping Information pane, click the Map Spec Docs tab.



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

Field Name	Description
Document	Specifies the name of the physical document being attached to the map-
Name	ping specification.
	For example, Mapping Details.
Document	Drag and drop document files or use ≐ to select and upload document
Object	files.
Document	Specifies the document owner's name.
Owner	For example, John Doe.
Document	Specifies the URL of the document.
Link	For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-
LITIK	b5YkMBq4ptA7jhg5/view
Description	Specifies the description of the document.
Description	For example: The document has information about the mapping details.
Approval	Specifies whether the document requires approval.
Required	Select the <b>Approval Required Flag</b> check box to select the document
Flag	status.
	Specifies the status of the document.
Document	For example, In Progress.
Status	Select the status of the document from the drop down. This field is avail-
	able only when the <b>Approval Required Flag</b> check box is selected.

# 4. Click

The mapping specification document is added.

# **Assigning Mapping Specifications to Users**

You can assign a mapping specification to your team members in the following capacities:

- Mapping Designer
- Mapping Approver
- Mapping ETL Developer
- Mapping Tester

By default, the user that creates the mapping specification is the Mapping Designer. You can re-assign another user as the Mapping Designer.

To assign mapping specifications to users, follow these steps:

1. In the Additional Mapping Information pane, click the Assignment tab.

Additional Mapping Information								
↓ QL Target Update	e Strategy	Testing Notes	Map Spe	c Docs	Assignment	Specifi	cation Artifacts	
	Assigned	ō		Status		D*		
Mapping Designer	Administr	ator - Default System U	ser(Admin	In Progress				
Mapping Approver	Jane Doe	janedoe)		Not Started				
Mapping ETL Developer	Joey Wils	on(jwilson)		Not Started				
Mapping Tester	public - D	efault System User(pub	olic)	Not Started				
Distribution / CC List								
Custom Notes								
						-		

2. Click 🖉.

dditional Mapping Inform	nation					
QL Target Update S	strategy Te	sting Notes	Map Spec Do	ics Assig	nment Specification	Artifacts
	Assigned To		Stat	us	Email	
Mapping Designer	Administrator - De	efault System User(A	dministi 🔻 In F	Progress	•	
Mapping Approver	Jane Doe(janedo	e)	▼ No	t Started	•	
Mapping ETL Developer	Joey Wilson(jwils	on)	▼ No	t Started	<b>•</b>	
Mapping Tester	public - Default S	ystem User(public)	▼ No	t Started	•	
Distribution / CC List						
Custom Notes	वि 🔺 म	BIU		≣ ≣ ⊒	*	
					*	
					•	

**Assigning Mapping Specifications to Users** 

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

Field Name	Description			
Mapping	Specifies the User Full Name and User ID of the Mapping Designer.			
Designer	For example, Jane Doe(janedoe).			
Mapping	Specifies the User Full Name and User ID of the Mapping Approver.			
Approver	For example, John Doe(jdoe).			
	Specifies the User Full Name and User ID of the Mapping ETL			
Mapping ETL Developer	Developer.			
Developer	For example, John Denver(jdenver).			
Mapping Tester	Specifies the User Full Name and User ID of the Mapping Tester.			
	For example, Michael Samuel(M.Samuel).			
Status	Specifies the status of the user's task.			
Status	For example, Pending Review.			
Email	The Email check boxes populate as you select corresponding users.			

**Assigning Mapping Specifications to Users** 

Field Name	Description				
	Select the check boxes to send email notifications to the cor-				
	responding users about the mapping assignment and change in map-				
	ping status.				
	For more information on configuring email notifications, refer to the				
	Configuring Notifications topic.				
	Enter a comma-separated list of email IDs that should receive the				
Distribution/CC	email notification about the assignment.				
List	For example, ab.dav@xyz.com, cal.kai@xyz.com				
	The email notification is sent from the administrator's email ID.				
	Specifies custom notes about the mapping assignment.				
Custom Notes	For example: John Denver is the Mapping ETL Developer of the map-				
	ping specification.				
	Specifies the changes in the mapping assignment. The information in				
Assignment	this field is system-generated.				
Changes	For example: User Administrator - Default System User(Admin-				
Changes	istrator) has been assigned to the mapping on 2020-01-12				
	19:58:15.815.				

# 4. Click 💾.

The mapping specification is assigned to the users.

# **Linking Additional Specification Artifacts**

The Requirements Manager captures functional requirements of a data integration project using Specification Artifacts. You can link these specification artifacts with mapping specifications.

To link specification artifacts with mapping specifications, follow these steps:

1. In the Additional Information pane, click the Specification Artifacts tab.

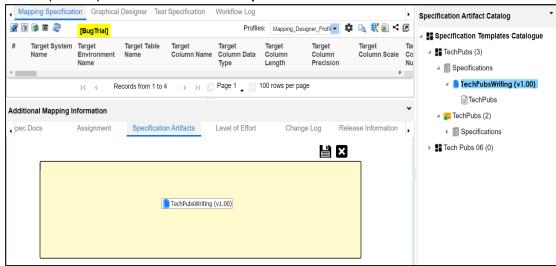
Additional Mapping Information									
epec Docs	Assignment	Specification Artifacts	Level of Effort	Change Log	Release Information				
					Ø				

2. Click 🖉.

Additional Mapping Information								
↓ pec Docs	ò	Assignment	Specification Artifacts	Level of Effort	Change Log	Release Information		
						×		

**Linking Additional Specification Artifacts** 

3. In the right pane, expand the **Specification Artifact Catalog** pane and drag and drop the required specification under the **Specification Artifacts** tab.



# 4. Click

The specification artifact is linked.

## **Recording Level of Effort**

You can record and compare planned level of effort with the actual level effort spent on creating and managing mapping specifications.

To record the level of effort, follow these steps:

1. In the Additional Mapping Information pane, click the Level of Effort tab.

Additional Ma	pping Information						~
<ul> <li>Testing No</li> </ul>	otes Map Spec Docs	Assignment	Specificat	ion Artifacts	Level of Effort	Change Log	Release Information
Planned Level of	Effort			Actual Level of	f Effort		Ø
Mapping Effort	0.0 Days			Mapping Effort	0.0 Days		_
ETL Effort	0.0 Days			ETL Effort	0.0 Days		
Notes				Notes			
			-				*
			*				•

2. Click 2.

Additional Ma	oping Information						•
Testing No	otes Map Spec Docs	Assignment	Specification	Artifacts	evel of Effort	Change Log	Release Information
Planned Level of	Effort			Actual Level of Effe	ort		<b>Ľ</b> ×
Mapping Effort	0.0 Days			Mapping Effort	0.0 Days		
ETL Effort	0.0 Days			ETL Effort	0.0 Days		
Notes				Notes			
🖻 <u>А</u> <u>н</u>	B I ∐ ≣ ≣ ≣ ≣	目目 🗄 🍯 🖌	·	🖻 <u>A</u> <u>H</u>	B <i>I</i> <u>U</u> ≣	≣ ≡ ∎ \$E	E '≣ '≣ <b>≼</b>
			*				*
			~				Ψ

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

Field Name	Sub- Fields	Description
Planned Level of Effort		Specifies the planned mapping effort in days. For example, 10.5 days.
	ETL Effort	Specifies the planned ETL effort in days.

**Recording Level of Effort** 

Field Name	Sub- Fields	Description				
		For example, 10.5 days.				
		Specifies notes about the planned level of effort.				
	Notes	For example: Planned level of effort took all the project				
		requirements into account.				
	Mapping	Specifies the actual mapping effort in days.				
	Effort	For example, 9.5 days.				
Actual Level of	ETL Effort	Enter the actual ETL effort in days.				
Effort		For example, 9.5 days.				
		Specifies the notes about the actual level.				
	Notes	For example: Actual level of effort were lesser than the				
		planned level of effort.				

# 4. Click

The level of effort tab is recorded.

## **Viewing Change Logs**

A change log is a record of changes made in a Mapping Specification grid. You can view these changes on the Change Log tab. By default, this tab is disabled. You can enable it under Change Log Settings. For more information, refer to the <u>Configuring Change Log Settings</u> topic.

To view the change logs of the mapping specifications, in the **Additional Information** pane, click the **Change Log** tab.

Workspace Mappings	. <b>▲</b>	Apping Sp	ecification Graphica	l Designer Tes	t Specification	Workflow Log				,
🚯 Test Cases 🔺		i 🔯 🖬	(BugTrial)				Profiles: Map	ping_Designer_Profil 🔻	🗘 🗟 👯 🖉	1 < 2
🖷 🔜 Mappings	#	Target S Name	System Target Environment	Target Table Name	Target Column Name	Target Column Data	Target Column	Target Column	Target Column Scale	Target Colum
🔺 🥅 BugTrial (v1.00)		Name	Name	Name	Column Name	Туре	Length	Precision	Column Scale	Nullabl
MappingTargets										
a 🛅 Data Integration (v1.00)	'	1 SQLTech	Pubs SQLTechPubs	dbo.Categories	CategoryID	int	4	10	0	- 1
MappingTargets										
a 📻 erwinSalesIntegration (v1.01)				Records from 1 to	1	Page 1	100 rows por p	200		•
MappingTargets			IK K F	ecords from 1 to	+ > > 🗋	Page 1	roo rows per p	age		
Archive	Add	itional Map	oping Information							•
m ff (v1.00)		Map	o Spec Docs	Assignment	Specification	Artifacts	Level of Effo	rt Change	Log Relea	ase Infc
SalesforceIntegration (v1.00)	#	Log	Changed Log Descr	ption		Map Version	La	st Modified By	Last Modified	Date
🍈 MappingTargets		ld							Time	
⊿ 🧰 TechPubsBUgTrial (v1.00)		1 58				1.00	Adı	ministrator	2020-08-27 14:	:13:23.08
MappingTargets										
FlowTest (1)		2 43	Trial for bug testing			1.00	Adı	ministrator	2020-06-08 10:28:46.793	
Hi-Tunes (0)									2020-06-08	
Lineage Demo (12)		3 42	Testing the flow for a b	ug.		1.00	Adı	ministrator	10:26:50.783	
Project (4)										
•										

The change logs of the mapping specification appears.

## **Viewing Release Information**

The release, migration, and audit-related information of a mapping specification are available on the Release Information tab. For more information on releases, refer to the <u>Release</u> <u>Manager</u> section.

To view release information of mapping specifications, in the **Additional Mapping Information** pane, click the **Release Information** tab.

Additional Mapping	g Information				
↓ pec Docs	Assignment	Specification Artifacts	Level of Effort	Change Log	Release Information
Release Details					
Release	DeltaRelease		Project	ErwinSa	les
Status		DVAL	Owner	Admin	strator
Migration Details					
From	DEV		То	DEV	
Live Date	06/18/2021 HH:M	M AM/PM	Migration	Date 06/18/2	021 HH:MM AM/PM
Audit Details					
Created By	Administrator		Created E	Date 06/18/2	021
Last Modified By	Administrator		Last Mod	ified Date 06/18/2	021

The release information of the mapping specification appears.

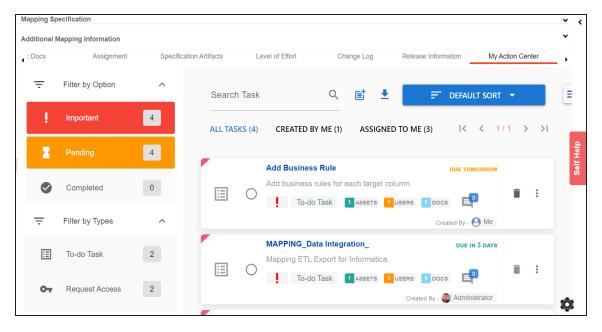
# **Adding Tasks**

To collaborate on mappings you can create tasks depending on your requirement. By default, you can create to-do tasks, access requests, or issues. Apart from these task types, you can configure custom task types via Task Type Configuration.

To add tasks, follow these steps:

1. In the Additional Mapping Information pane, click the My Action Center tab.

The My Action Center tab opens. It displays a list of all tasks related to the map.



2. Click 📑.

A list of task types appears.

**Adding Tasks** 

Search	Task	Q	et	Ŧ	Ē	- D	DEFAU	lt sor	т 👻	
ALL TAS	KS (3)	CREATED BY ME (1)	To-do	o Task			I<	<	1 / 1	> >1
			Requ	est Acce	SS					
	0	Add Business rule Add business rule for e	Issue				DUE II	N 2 DAYS		
От		Request Acces	s 1	ASSETS	2 USERS	0 0	ocs	F	Î	
					Created By	- 🛞	Admin	istrator		

3. Click the required task type.

The Create New Task page appears.

		<b>:</b> ×
Create New Task		
TASK DETAILS		
Task is being created on Asset		•
Name MAPPING_Data Integration_		
Description		25 / 200
		0/5
Important		
YES	NO	
Due		
Assign Users		•
External user emails		
Hit the ENTER key to add a new Email		

Adding Tasks

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

Field Name	Description
Task is being cre-	Specifies the asset for which the task is created.
ated on Asset	This field autopopulates with the map name.
With Task Type	Specifies the task type.
as	For example, To do Task.
	Specifies the name of the task.
Name	By default, it autopopulates with a name in the fol- lowing format: Mapping_ <map_name>. You can edit it and rename the task.</map_name>
	For example, Test Mappings.
	Specifies a description of a task.
Description	For example: Test all the mappings and record the effort required.
Important	Specifies whether the task is important
Due	Specifies the due date of the task. Use 💼 to set the due date.
	Specifies the users assigned to the task. You can
Assign Users	assign DI and BU users from the list. For example, Richard Cooper.
External user	Specifies the email ID of external users.
emails	For example, chris.harris@quest.com

## 5. Click 🔁.

The task is created and saved. Use  $\checkmark$  to edit the task details and attach relevant documents.

## Chat

Use the Chat tab to send messages to the assigned and external users of a task.

### **Adding Tasks**

On the **Chat** tab, enter your message in the text box and use the following options:

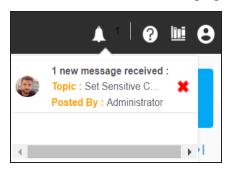
### Assigned

Use this option to send messages to the assigned users.

### **External Users**

Use this option to send messages to external users.

Users are notified via Messaging Center.



You can manage a task using the options available on the task list. Managing a task involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading Chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

With the My Action Center tab, you can filter and search tasks based on its status and assignments. For more information on search and filter mechanisms, refer to the <u>Filter and Search</u> topic.

# **Configuring Task Types**

With My Action Center, you can configure task types to collaborate on miscellaneous tasks. By default, three task types, To-Do Task, Request Access, and Issue are available. These task types cannot be edited or deleted.

To configure task types, follow these steps:

1. On the **My Action Center** tab, click  $\mathbf{\Xi}$ .

The Task Type Configuration page appears. It displays a list of available task types.

Task Type Configuration	×
Add New Task Type	+
Task Tanas	0 / 25
Task Types	
To-do Task	/ Ō
Request Access	1
issue	/ Ō

2. Enter a new task type in the space provided, and then click +.

The task type is added in the list of available tasks.

For example, in the following image, a task type, schedule job is added in the Task Types list.

## Configuring Task Types

Task Type Configuration		×
Add New Task Type		+
		0 / 25
Task Types		
To-do Task	1	Ô
Cor Request Access	1	Ô
issue	1	Ō
Schedule Job	1	Ō

3. Use the following options to manage task types:



Use this option to edit the task type.

Delete (🗍)

Use this option to delete a task type.

## **Managing Tasks**

Managing tasks involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading Chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

To mark tasks complete, on the task list, for the required task, click the radio button. The task is moved to the list of completed task.

For example, in the following image, the task, Add Business rule is marked complete.

Search Task	q 🖬 🥲	DEFAULT SORT
ALL TASKS (4)	CREATED BY ME (2) ASSIGNED TO ME (2)	I< < 1/1 > >I
от 💿	Add Business rule Add business rule for each source column. Request Access 1 ASSETS 2 USERS 0 pocs	Created By - 🚭 Administrator
	Add Transformations Add transformations for Data Integration. To-do Task TASETS ZUSERS Opcos	DUE IN 3 DAYS

To manage tasks, follow these steps:

1. In the task list, for the required task, click **‡**.

The available options appear.

### **Managing Tasks**

Search T	ask	Q 📑 C <sup>0</sup> 🛨		Ŧ	DEFAULT SORT 🔻
ALL TASK	S (4)	CREATED BY ME (2) ASSIGNED TO ME (2)			IK K 1/1 > >I
От	۲	Add-Business-rule Add business rule for each source column. Request Access 1 Assets 2 Users 0 docs E	Create		View Task Details
	0	Add Transformations Add transformations for Data Integration. I To-do Task 1 Assets 2 Users 0 pocs	Create	~	Edit Task Details Disable Notification
	0	Test the mappings Test all the mappings and record the effort required. I To-do Task Assets 2 users o pocs			Download Chat as Text Send Chat as Email
ŧ	0	PROJECT_erwinDIS_ Add mapping admin Issue 1 Assets 2 USERS 0 DOCS		Crea	Mark as Pending

2. Use the following options to work on tasks:

### **View Task Details**

Use this option to view task details. These details include task name, description, assigned assets, attached documents, and so on.

#### **Edit Task Details**

Use this option to update task details.

### **Disable Notification**

Use this option to stop receiving notifications related to a task. By default, notifications are enabled, and users assigned to task receive notifications.

### **Download Chat as Text**

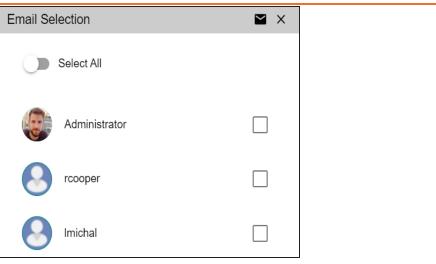
Use this option to download chat related to a task in the TXT format.

### Send Chat as Email

Use this option to share the chat related to a task via an email. Click **Send Chat** as **Email**.

The Email Selection page appears. It displays a list of users assigned to the task.

**Managing Tasks** 



Select the required users, and then click  $\blacksquare$ . An email is sent to the selected users.

### Mark as Pending

This option is available for a completed task. Use this option to mark a task as pending.

To delete a task, in the task list, for the required task, click  $\widehat{\blacksquare}$ .

You can delete a task only if you have created the task.

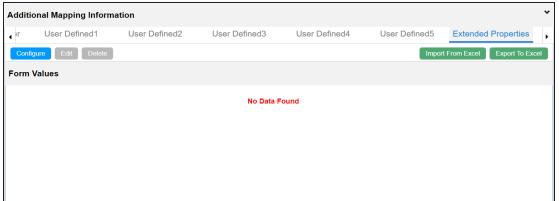
# **Configuring Extended Properties**

You can configure user-defined properties of a mapping specification under the **Extended Properties** tab.

First, you need to set up a form and then use it to configure the user-defined extended properties.

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

1. In the Additional Mapping Information pane, click the Extended Properties tab.



2. Click Configure.

Extended Properties Configuration					_ 🗆 ×
Edit Delete					
Field Controls					
Group Text Box Combo Box	List Radio Check Box M	T Jumb	er Boolean Date F		•
Configure Form			Properties		
Radio		^	Property	Value	
		1	Published		<b>^</b>
Text Box		1	Field	Radio	
Combo Box	Select an option	,	Field	Radio	- 1
			Туре	Radio	- 1
Module	Links				
			Configure Values	Configure	
Resource Manager	https://erwin.com/bookshelf/10.2DISBookshelf/Cont	le	Description		
Metadata Manager	https://erwin.com/bookshelf/10.2DISBookshelf/Cont	le			
		*	Visible in Extended Propertie	IS ON	*

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

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

Extended Properties Configuration			
Save Cancel Delete			
Field Controls			
Text Box Check Box Number	Boolean Date Picker Category Rich E		
Configure Form		Configure Form	
		Property	Value
Check Box		Published	ON
Rich Editor		Field	Rich Editor
		Туре	Rich Editor
		Dependencies	Type or click here
		Configure Values	Configure
		Mandatory	OFF
		Regular Expression	
		Note <sup>*</sup> : 1.Double click on the field cell to update the field nam 2. Select the field name to update its properties	6

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

Refer to the following table for property descriptions:

Property	Description
Published	Switch <b>Published</b> to <b>ON</b> to publish the field.
Field	Specifies the field label.

**Configuring Extended Properties** 

Property	Description		
	To change the field labels, double-click the corresponding <b>Value</b> cell.		
	For example, Mapping Specification Approved On.		
	Specifies the type of the field.		
Туре	To select field types, double-click the corresponding <b>Value</b> cell.		
	For example, Date Picker.		
	Defines the pick list fields that can be used as controlling fields. It		
Dependencies	works only with the Reference Data Manager connector.		
Dependencies	To define pick list fields, select the fields from the drop down option.		
	Specifies the connectors for the field.		
	To enter option values, click <b>Configure Values</b> .		
	Use the following options:		
Configure Values	Default connector: Use this option to enter option values manually or using an MS Excel file.		
	Reference Data Manager : Use this option to pull option values from reference tables in the Reference Data Manager.		
Mandatory	Specifies whether the field is mandatory.		
	Specifies the field description.		
Description	To enter field descriptions, double-click the corresponding <b>Value</b> cell.		
Visible in Exten-	Switch Visible in Extended Properties to ON to make it visible on		
ded Properties	the Extended Properties tab.		
	Specifies the order of the field on the Extended Properties tab.		
Order	To enter the order number, double-click the corresponding Value cell.		
	You can also drag and move fields in the Configure Form pane to change its order.		

5. Click Save.

### **Configuring Extended Properties**

The form is saved and is available on the Extended Properties tab.

You can download extended properties in the XLSX format and use it as a template to <u>import extended properties</u>. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.

When you configure extended properties using UI elements, such as combo box, radio button, and list, you also need to configure their option values. You can use the default connector to import option values from an MS Excel file or enter them manually.

To configure option values using the default connector, follow these steps:

1. In the **Configure Form** section, click the required UI element.

Ensure that you are in edit mode.

2. In the **Properties** section, click **Configure**.

The Connectors page appears.

Connectors	_ 🗆 ×
Default Connector	Next

3. On the **Connectors** page, ensure that the Default Connector option is selected. Then, click **Next**.

The <UI\_Element> Options page appears. For example, if the UI element is Combo Box, the Combo Box Options page appears.

Combo Box Options	_ <b>_</b> ×
Add Save Delete Import Excel	
Text	Value

4. Use the following options:

### Add

Use this option to enter text and value manually.

### **Import Excel**

Use this option to import options from MS Excel files.

5. After configuring option values, click **Save**.

To add option values manually, follow these steps:

- 1. Click Add.
- 2. Enter values to the Text and Value fields.

The Text corresponds to options whereas the Value corresponds to underlying value of an option. You can add as many values as needed.

Combo Box Options	_ □ ×
Add Save Delete Import Excel	
Text	Value
Data Steward_GER	rcooper
Data Steward_ROM	vsmith

3. Click Save.

The option values appear in the UI element under the Configure Form section.

Combo Box	Select an option	~
	Select an option	
	Data Steward_GER	
	Data Steward_ROM	

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

1. Click Import Excel.

The Upload Excel page appears.

Upload Excel	_ 🗆 X
Attach Excel File Choose File No file chosen	<b>A</b>
ί ×	
Note <sup>*</sup> : 1. Empty FIELD pairs are ignored.	
2. Duplicate FIELD pairs are ignored.	
<ol><li>Slash(/) FIELD pairs are ignored.</li></ol>	
4. FIELD pair with more than 200 characters are ignored.	•

2. Click **Choose File** and select the required MS Excel file.

The Upload Excel page appears. It displays the data in the MS Excel file.

Upload Excel			
#	GROUP NAME	ROLE NAME	USER ID
#	Select Column To Import	Select Column To Import	Select Column To Import
1	Data Stewards	Data Steward_GER	mmannigan
2	Data Stewards	Data Steward_GER	mmenza
3	Data Stewards	Data Steward_GER	mmannigan

3. Double-click the **Select Column To Import** cell in the required column.

The available options appear.

#	GROUP NAME	ROLE NAME	USER ID
#	Select Column To Import	Select Column To Import	Select Column To Import
		VALUE	
1	Data Stewards	Clear Selection	mmannigan

4. Select the appropriate option.

Field corresponds to options and Value corresponds to value of an option. You can import multiple columns. Use Clear Selection to undo the selection.

5. Click 1

The <UI\_Element> Options page appears. It displays the imported columns. You can delete a row that is not required. To delete rows, click a row and then click **Delete**.

Combo Box Options		- ¤ ×
Add Save Delete Import Excel		
Text	Value	
Data Steward_GER	mmannigan	<b>^</b>
Data Steward_UK	rcooper	
Data Owner_GER	esimpson	
Data Owner_RO	ksridhar	
Tech Data Steward_GER	jadams	•

6. Click Save.

The option values appear in the UI element under the Configure Form section.

Combo Box List	Select an option	~
	Select an option	
	Data Steward_GER	
	Data Steward_UK	
	Data Owner_GER	
List	Data Owner_RO	
	Tech Data Steward_GER	
	Mapping Admin	
	ETL Developer	
	Mapping Designer	

When you configure extended properties using UI elements, such as combo box, radio button, and list, you also need to configure their option values. You can use the Reference Data Manager connector to import option values from tables in the Reference Data Manager.

To configure option values using reference data manager connector, follow these steps:

1. In the **Configure Form** section, click the required UI element.

Ensure that you are in edit mode.

2. In the **Properties** section, click **Configure**.

Connectors

The Connectors page appears.

3. On the **Connectors** page, click **Reference Data Manager** and then click **Next**.

The Reference Data Manager page appears. It displays the reference folders in the Connector View pane.

Reference Data Manager	_ ⊏	1 ×
Back	Finis	h
Connector View	<	<
E III Reference Folders		
🔃 📲 erwin Sales		
🖶 📲 erwin_DG		
🗄 📲 TechPubs		
		Parameters
Preview Data		^

4. In the **Connector View** pane, expand a reference folder and select a reference table.

The Parameters pane displays the columns in the reference table. You can also click Preview to view the data in the reference table.

Reference Data Manager				_ 🗆 ×
				Back Finish
Connector View <	Parameters			>
□- <b> II</b> Reference Folders			Reset	Field
🛱 🎝 erwin Sales	CITY	Select	•	0
⊨-@Reference Tables	CITY_NAME	Select	•	0
E [] CITY_NAME(1.00)				
⊕- ITECHPUBS_TEAM(1.00)				
⊕- <b>∭</b> T_NAME(1.00)				
⊕- SALES_REF_DATA(1.00)				
ia- IIIHR_REF_TABLE(1.00)				
Preview Data				*
			Records 10 -	Preview
# CITY	CITY	NAME		

5. In the **Parameters** pane, click the radio button next to the required column.

You can select the controlling field from the drop down option. Ensure that you define the required dependencies in the Properties pane and that the option values for controlling field are configured using the same reference column.

6. Click Finish.

The Extended Properties Configuration page appears.

Extended Properties Configuration			_ <b>_</b> ×
Save Cancel Delete			
Field Controls			
Group Text Box Combo Box	List Radio Check Box	Number Boolean Date Picker Category	•
Configure Form		Properties	
Selected Koles Group	Compliance Unicer	Property Value	
	Mumbai Los Angeles	Description	•
List of Cities	New Delhi	Load On Startup	
Radio		Visible in Extended Properties on	

- 7. Under the **Properties** section, switch **Load on Startup** to **ON**.
- 8. Click Save.

The option values are configured. For example, in the following form the List of Cities is the controlling field for Selected City. Both the fields get their option values from the same reference column.

Configure Form	
Governance Responsibilities	Compliance Officer
Selected Roles Group	Compliance Officer
List of Cities	Mumbai Los Angeles New Delhi
Selected City	Cos Angeles

# **Importing from Excel**

You can import user-defined properties of a mapping specification from an XLSX file. You can either use an existing XLSX file or download a extended properties file from a mapping specification. Ensure that the XLSX file follows the correct template.

To import extended properties from XLSX files, follow these steps:

1. On the Extended Properties tab, click Import From Excel.

The Upload Excel page appears.

Upload Excel	_ 🗆 ×
Attach Excel File Choose File No file chosen	
(1) 🗙	

- 2. Click Choose File.
- 3. Browse and select the XLSX file.
- 4. Click **①**.

The Upload Excel page appears. It displays the data in the XLSX file.

Upload Excel						-
#	FIELD	VALUE	<sup>▲</sup> TYPE	PARENTFIELD	CREATED_BY	CREATED_DATE_TIME
#	Select Column To Import					
1	Data Stewards		Combo Box			
2	Data Steward_UK	Data Steward_UK	Text Box	/Data Stewards	Administrator	10/20/2020 06:42:38
3	Data Steward_GER	Data Steward_GER	Text Box	/Data Stewards		
4	Data Owners	Data Owner_GER	Text Box		Administrator	10/20/2020 06:42:38

5. Double-click the Select Column To Import cell in the required column.

The available options appear.

### Importing from Excel

Upload Excel				
Û×				
#	FIELD	VALUE	<sup>≜</sup> TYPE	PARENTFIELD
#	Select Column To Import FIELD VALUE	Select Column To Import	Select Column To Import	Select Column To Import
1	TYPE PARENTFIELD		Combo Box	
2	Clear Selection Data Steward_UK	Data Steward_UK	Text Box	/Data Stewards
3	Data Steward_GER	Data Steward_GER	Text Box	/Data Stewards

6. Select an appropriate option.

For example, if you select Field, then the selected column is imported as Field.

Similarly, you can also select the Value, Type, and Parentfield columns. Ensure that you at least select a Field column.

# 7. Click

The extended properties are imported.

Configure Edit Delete		Import From Excel	Export To Excel
Form Values			telp
			Self Help
Data Stewards	Select an option		~
Data Owners	Data Owner_GER		
Technical Data Steward	Tech Data Steward_GEF	2	
Compliance Officer	Mapping Designer		•

# **Branching and Merging Maps**

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

Branching and merging maps involves:

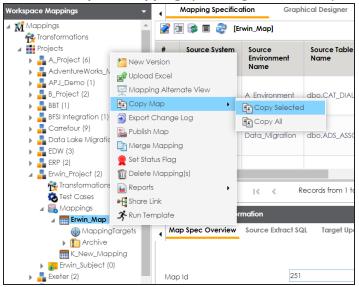
- Branching maps
- Merging changes into parent maps

# **Branching Maps**

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

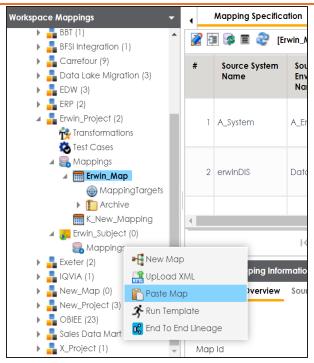
To branch maps, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a map and hover over the Copy Map.



- 3. Click Copy Selected.
- 4. Right-click the **Mappings** node under the required project or subject area.

### **Branching Maps**



5. Click Paste.

The mail comments page appears.

Mail Comments	- 🗆 🗙

6. Enter Mail Comments and click

The map is copied successfully into the subject area or the project. You can rename the child map and modify as needed. For example, you can change the reference

### **Branching Maps**

table, business rule, or add or remove columns. For more information on renaming mappings, refer to the <u>Updating Map Spec Overview</u> topic.

If you enable notifications in Mapping Manager Settings, project users receive an email notification when the map is copied to a project. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.

# **Merging Changes into Parent Maps**

After making the required changes in a child map you can merge it with a parent map. You can also notify project users about the merge through email notifications.

To merge child maps with parent maps, follow these steps:

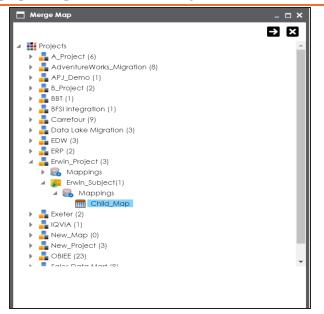
- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, right-click a parent map.



3. Click Merge Mapping.

The Merge Map page appears.

**Merging Changes into Parent Maps** 



- 4. Select a child map.
- 5. Click **D**.

The Merge Map page shows the changed data with respect to the parent map.

Image: Constraint of the second se	
Image: Description of the section of the sectin of the section of the section of the section of the sec	
Image: Child_Map(1.00) [Erwin_Project/ Erwin_Su         Erwin_Map(1.07) [Erwin_Project]         erwinDIS         Data_Migration         dbo.ADS_New_ASSOCIATIONS         ID_New           Image: Child_Map(1.00) [Erwin_Project/ Erwin_Su         erwinDIS         Data_Migration         dbo.ADS_New_ASSOCIATIONS         ID_New	
Image: Section of the section of th	
Child_Map(1.00) [Erwin_Project/ Erwin_Su erwinDIS Data_Migration dbo.ADS_New_ASSOCIATIONS ID_New	
Inchanged Data	
E Erwin_Map(1.07) [Erwin_Project]	
Erwin_Map(1.07) [Erwin_Project]	
E Erwin_Map(1.07) [Erwin_Project]	
Evin_Map(1.07) [Ervin_Project]	
Records from 1 to 18 of 18	)
il Comments all Comments Overwriting the existing Erwin_Map.	

### **Merging Changes into Parent Maps**

### 6. Use the following options:

### Overwrite existing version

Use this option to overwrite the existing version.

### **Create New Version**

Use this option to create new version of the parent map.

### 7. Enter relevant Mail Comments.

8. Click 💾.

The child map is merged with the parent map.

If you enable notifications in the Mapping Manager Settings the project users receive mail comments through an email notification. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.

### **Deleting Maps**

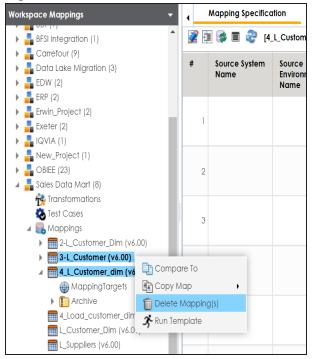
You can delete maps that are not required in a project. You can also opt to delete all the versions of a map.

To delete maps, follow these steps:

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

You can use shift key to select multiple maps.

3. Right-click the selection.



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

The Delete Mappings-Selected Mappings List page appears.

#### **Deleting Maps**

Delet	te Mappings - Selected Mappings List				- 0
	×				
#	Project Hierarchy	Map Name	Current Version	All Versions	
1	Sales Data Mart	4_L_Customer_dim			×
2	Sales Data Mart	3-L_Customer			×

5. Use the following options:

### Remove Mapping from Current Selection (🗮)

Use this option to remove mappings from the current selection.

### **Delete all Versions**

Use this option to delete all versions of the mappings.

### **Delete Current Version**

Use this option to delete current version of the maps.

# **Viewing Workflow Logs**

A default workflow, Mapping\_Manager\_Default\_Workflow is assigned to all projects in the Mapping Manager. You can also create a workflow and assign it to your project. For more information on assigning workflow to projects, refer to the <u>Managing Mapping Manager</u> <u>Workflows</u> section.

You can view the flow of actions of the workflow assigned to a map. Along with other information, the workflow displays the current state of the map in the workflow.

To view workflow logs, follow these steps:

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

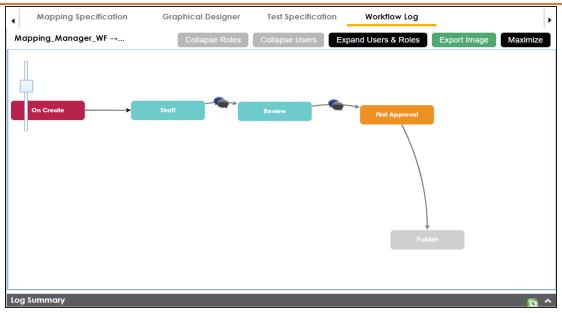
By default, the Mapping Specification tab opens.

Workspace Mappings 🔹 👻		Mapping Specifico	ition Graph	nical Designer	Test Specification	Workflow Lo	g	•
Mappings	2	🗉 🔯 🔳 🍣 (Er	win_Map]		Profiles: D	efault	🔻 🎗 🐧	🕺 🔊 < 🗵
<ul> <li>Projects</li> <li>Erwin_Project (1)</li> <li>Transformations</li> </ul>	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>Test Cases</li> <li>Mappings</li> <li>Erwin_Map (v1.01)</li> </ul>	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	ID	bigint	8	ABS
→ ∰ MappingTargets	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	SOURCE_OBJECT_	bigint	8	ABS

3. Click the Workflow Log tab.

The workflow log of the map appears. The current workflow stage blinks in the diagram.

### Viewing Workflow Logs



Use the following options:

### User Comments () ()

Use this option to view users and their comments in each stage.

#### Expand/Hide Users and Roles

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

#### **Collapse/Expand Roles**

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

### **Collapse/Expand Users**

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

### **Export Image**

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

# **Analyzing Mappings**

This section walks you through the multiple ways of analyzing source to target mappings.

Analyzing mappings involves:

- Data preview
  - Generating virtual preview of target
  - Previewing data through Metadata Tree View
- Gap analysis
  - Performing table gap analysis
  - Performing column gap analysis
- Impact analysis
  - Running impact analysis for tables and columns
- Lineage analysis
  - Running dual, forward, or reverse lineage analysis
  - Running end to end lineage
- Business view
- Mapping statistics

## **Generating Virtual Preview of Targets**

When you create a mapping specification, source column values undergo modifications based on the applied transformations. These modified values are updated in target columns based on the target update strategy. You can generate a virtual preview of targets to view the updated target columns.



Mapping specifications involving multiple source or target systems do not support virtual preview of targets.

To generate a virtual preview of targets, follow these steps:

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

The Mapping Specification grid appears.

Workspace Mappings 🔹 👻	4	Mapping Specific	ation Graph	nical Designer	Test Specification	Workflow Lo	g	•
Mappings			[Integration	1]	Profi	les: Default	Ţ Į	: 🗟 👯 🛛 🖬 🖬 😣 < 🛛
Projects     Projects     Data Lake Migration (3)     EDW (3)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>EDW (3)</li> <li>ERP (3)</li> <li>Erwin_Project (5)</li> <li>Erwin_Sales (1)</li> <li>Transformations</li> <li>Fest Cases</li> <li>Mappings</li> </ul>	1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEID	int	4	FLOOR
MappingTargets     Exeter (2)     QVIA (1)	2	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCENAME	varchar	100	REVERSE
<ul> <li>New_Project (3)</li> <li>OBIEE (23)</li> </ul>	3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	

3. Click 🔍

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

**Generating Virtual Preview of Targets** 



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

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

Mapping Preview					_ 🗆 ×
					10 🔍 🏹
RESOURCEID_New	RESOURCENAME_New	RESOURCEDESC_New	RESOURCECELLPHONE_New	RESOURCEHOMEPHONE_New	RESOURCEEMAIL_New
1	nimdA				
2	rahdirS kitraK				
3	emaN_ecruoseR	desc			
4	srelliV eoJ				

You can download the mapping preview details in the XLSX format. To download the mapping preview details, click 🔊 .

### **Previewing Data**

You can preview data in a table using the Metadata Tree View pane. You can also enter SQL queries to preview the required data in the database.

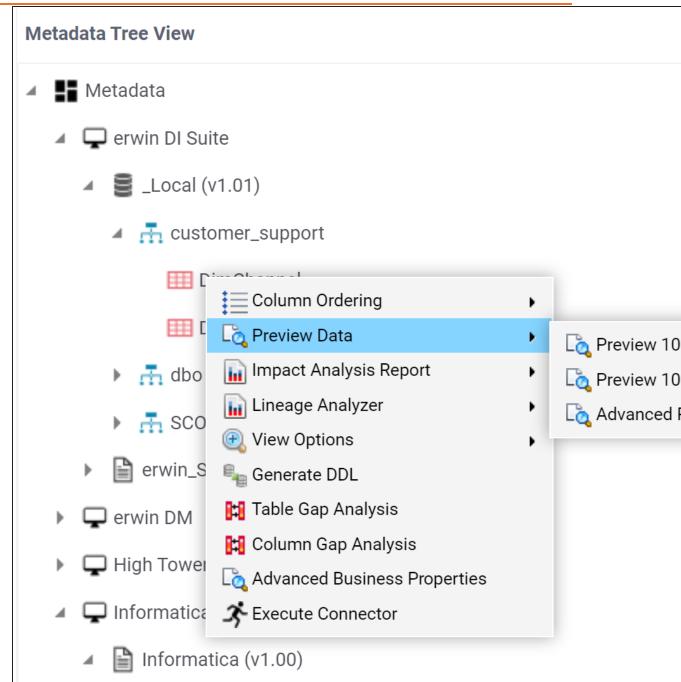
To preview data from databases, follow these steps:

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

#### The Metadata Tree View pane appears on the right.

Workspace Mappings	• •_	Mapping Summary	Project Details	Project Documents	Project Users	Project Roles
	Map	oing Search	-			
Mappings	Map	bing Details				
🙀 Transformations	#	Project Name	Subject Hierarchy	/ Map	Name	Lock Status
Projects	π	Floject Name	Subject merarchy	y Map	Name	LUCK Status
ABC (3)						
🕨 📲 batter (0)			L			
▶ <mark>-</mark> Del (0)	1	Project		Data Ir	ntegration	6
🕨 📲 dgfd (0)						
DigitalAdoption (4)	2	Project		DragD	rop	a
🕨 🔒 erwinDIS (7)	3	Project		Salesf	orceIntegration	<b>a</b>
🕨 📲 ffgg (2)	0	riojeet		Galesi	orcentegration	
🕨 📲 FlowTest (3)	4	Project		TechP	ubs	a
🕨 🚦 Hi-Tunes (2)		, ,				-
🕨 <mark>-</mark> Lineage Demo (14)						
🔺 – Project (4)						

3. In the Metadata Tree View pane, right-click a table and hover over Preview Data.



4. Click any one of the following:

**Preview 100 Records** 

Click this option to preview the first 100 records.

#### **Preview 1000 Records**

Click this option to preview the first 1000 records.

#### **Advanced Preview**

Click this option to preview data based on a SQL query.

For example, if you click **Preview 100 Records**, then the User Credentials page appears.

🔲 User Credent	ials		-	<b>- ×</b>
Note:Validate Use	er credentials to proceed	→	×	
User Name* :				
Password* :				

5. Enter User Name and Password to connect with the database.

You can preview the data based on the options you selected.

Preview Data								
System Name:A_System								
Environment Name: A Environment								
Table Name:dbo.CAT_DIALOG_TAB								
#	CAT_DIALOG_TAB_ID	CAT_DIALOG_PROFILE_ID	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROPERTIES	CREATED_BY	CREATED_DATE_TIME		
1	1	1	DefaultTab		Administrator	2018-09-14 10:39:46.02		
2	2	2	DefaultTab		Administrator	2018-09-14 10:39:46.02		
3	3	3	DefaultTab		Administrator	2018-09-14 10:39:46.02		
4	4	4	DefaultTab		Administrator	2018-09-14 10:39:46.02		
5	5	5	DefaultTab		Administrator	2018-09-14 10:39:46.023		
6	6	6	DefaultTab		Administrator	2018-09-14 10:39:46.023		
7	7	7	DefaultTab		Administrator	2018-09-14 10:39:46.027		
8	8	8	DefaultTab		Administrator	2018-09-14 10:39:46.027		
9	9	9	DefaultTab		Administrator	2018-09-14 10:39:46.027		
10	10	10	DefaultTab		Administrator	2018-09-14 10:39:46.027		
11	11	11	DefaultTab		Administrator	2018-09-14 10:39:46.03		
12	12	12	DefaultTab		Administrator	2018-09-14 10:39:46.03		
13	13	13	DefaultTab		Administrator	2018-09-14 10:39:46.03		
14	14	14	DefaultTab		Administrator	2018-09-14 10:39:46.03		
15	15	15	DefaultTab		Administrator	2018-09-14 10:39:46.03		
16	16	16	DefaultTab		Administrator	2018-09-14 10:39:46.03		
17	17	17	DefaultTab		Administrator	2018-09-14 10:39:46.033		
18	18	18	DefaultTab		Administrator	2018-09-14 10:39:46.4		
19	19	19	DefaultTab		Administrator	2018-09-14 10:39:46.423		



If you use Advanced Preview then you need to enter a SQL query in the space provided and click 🕑 to preview the data.

### **Previewing Data**

			Preview D	ata			
s	tem Name:A_Syster	n					
۱v	ironment Name:A_E	Environment					
•	CAT_DIALOG_TAB_ID	CAT_DIALOG_PROFILE_ID	CAT_DIALOG_TAB_NAME	CAT_DIALOG_TAB_PROPERTIES	CREATED_BY	CREATED_DATE_TIME	
	1	1	DefaultTab		Administrator	2018-09-14 10:39:46.02	
	2	2	DefaultTab		Administrator	2018-09-14 10:39:46.02	
	3	3	DefaultTab		Administrator	2018-09-14 10:39:46.02	
	4	4	DefaultTab		Administrator	2018-09-14 10:39:46.02	
	5	5	DefaultTab		Administrator	2018-09-14 10:39:46.023	
	6	6	DefaultTab		Administrator	2018-09-14 10:39:46.023	
	7	7	DefaultTab		Administrator	2018-09-14 10:39:46.027	
	8	8	DefaultTab		Administrator	2018-09-14 10:39:46.027	
	9	9	DefaultTab		Administrator	2018-09-14 10:39:46.027	
	10	10	DefaultTab		Administrator	2018-09-14 10:39:46.027	
	11	11	DefaultTab		Administrator	2018-09-14 10:39:46.03	
	12	12	DefaultTab		Administrator	2018-09-14 10:39:46.03	
	13	13	DefaultTab		Administrator	2018-09-14 10:39:46.03	

# **Performing Table Gap Analysis**

You can perform a table gap analysis and find:

- Tables not being used in mappings
- Tables existing on mapping without valid source or target

You can perform table gap analysis at the following levels:

- System
- Environment
- Table

To perform table gap analysis, follow these steps:

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

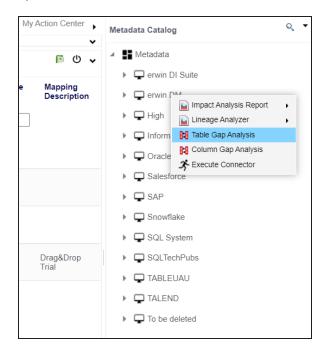
The Metadata Tree View pane appears on the right.

forkspace Mappings	Mapping Summary     Mapping Search	Project Details Project	Documents Project Users	Project Roles	Extended Properties	My Action Center			•	Metadata Tree View 🔍
Mappings	Mapping Details								<u>ه</u> 0 ب	
Reference of the test of t	# Project Name	Subject Hierarchy	Map Name	Lock Status	Locked By	Locked Date	Workflow Status	Mapping State	Mapping Description	<ul> <li>erwin DI Suite</li> <li>erwin DM</li> </ul>
ABC (3)										🕨 🖵 High Tower
<ul> <li>batter (0)</li> <li>Del (0)</li> </ul>	1 Project		Data Integration	â			Preliminary Draft	In Progress		<ul> <li>Informatica</li> <li>Oracle</li> </ul>
<ul> <li>adgfd (0)</li> <li>adgfd (0)</li> <li>DigitalAdoption (4)</li> </ul>	2 Project		DragDrop	a			Preliminary Draft	In Progress		<ul> <li>→ □ Salesforce</li> <li>→ □ SAP</li> </ul>
<ul> <li>a erwinDIS (7)</li> <li>a ffgg (2)</li> </ul>	3 Project		SalesforceIntegration	8	Administrator	23-05-2020 17:37:33	Preliminary Draft	In Progress		<ul> <li></li></ul>
<ul> <li>HowTest (3)</li> <li>Hi-Tunes (2)</li> </ul>	4 Project		TechPubs	۵			Preliminary Draft	In Progress	Drag&Drop Trial	<ul> <li>SQLTechPubs</li> <li>TABLEUAU</li> </ul>
🕨 🔒 Lineage Demo (14)										▶ 🖵 TALEND
🔺 🚪 Project (4)										🕨 🖵 To be deleted

- 3. In the Metadata Tree View pane, you can right-click a:
  - System: Use this option to run the analysis on all the tables under a system.
  - Environment: Use this option to run the analysis on all the tables under an environment.
  - Table: Use this option to run the analysis on a table.

Performing Table Gap Analysis

For example, the following image displays the available options when you right-click a system.



4. Click Table Gap Analysis.

The Table Gap Analysis page appears.

Performing Table Gap Analysis

Table Gap Analysis	_ 🗆 🗙
	<b>Z</b>
▲ 🔲 ∎∎ Projects	A
▶ □ ■ ABC (3)	
▶ 🔲 👪 batter (0)	
▶ 🔲 👪 Del (0)	
▶ □ ■ DigitalAdoption (8)	
▶ 🔲 📲 erwinDIS (7)	
▶ 🔲 🛃 ffgg (2)	
▶ 🔲 🛃 FlowTest (3)	
▶ 🔲 🛃 Hi-Tunes (2)	
Lineage Demo (14)	
▶ 🔲 ∎∎ Project (4)	
▶ 🔲 🛃 project 1 (4)	
▶ 🔲 🛃 Project Tech Pubs (8)	
▶ 🔲 📑 Tech Pubs Online (6)	
► TechPubs (6)	
▶ <b>■</b> Test (4)	-

- 5. Select projects and mappings.
- 6. Click 🔽.

The Table Gap Analysis Report for the selected projects and mappings appears.

## Performing Table Gap Analysis

📘 Table	Gap Analysis						_ 🗆 X		
						Export: 🕥 🔂 🖏	<b>1</b>		
Develo	pment Team								
	-								
			Table Gap An	alysis Report					
Table	e Gap Analysis Result Fo	r PROJECT(S) : AdventureWorl	ks_Migration						
Table	es not being used on any	mapping							
#	System Name		Environment Name		Table Name				
1	Erwin_Sales		Integration		dbo.RM_RESOURCE				
2	Erwin_Sales		Integration_Target		dbo.RM_RESOURCE				
3	Erwin_Sales		N_Environment		dbo.RM_PROJECT				
4	Erwin_Sales		N_Environment		dbo.RM_RESOURCE				
Table	es existing on Mapping w	rithout valid Source (or) Target							
#	System Name	System Env Name	Table Name	Project Name	Map Name	Usage			
	No Records Found								

# **Performing Column Gap Analysis**

A column gap analysis enables you to find:

- Columns not existing in mappings
- Source columns existing on mappings without valid target
- Target columns listed on mappings without business rule and source column

You can perform column gap analysis at the following levels:

- System
- Environment
- Table

To perform column gap analysis, follow these steps:

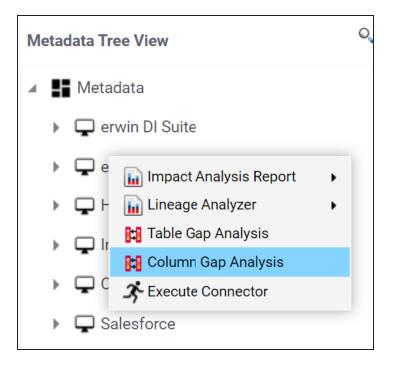
- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the **Workspace Mappings** pane, click a project.

### The Metadata Tree View pane appears on the right.

Workspace Mappings	· · -	Mapping Summary	Project Details	Project Documents	Project Users	Project Roles
Mappings		oing Search oing Details				
Transformations	#	Project Name	Subject Hierarch	y Map M	Name	Lock Status
<ul> <li>ABC (3)</li> <li>Abstract (0)</li> </ul>						
<ul> <li>a batter (0)</li> <li>a bel (0)</li> </ul>	1	Project		Data In	itegration	a
<ul> <li>b add dgfd (0)</li> <li>b add DigitalAdoption (4)</li> </ul>	2	Project		DragDr	ор	a
🕨 嚞 erwinDIS (7)	3	Project		Salesfo	prceIntegration	â
<ul> <li>ffgg (2)</li> <li>FlowTest (3)</li> </ul>	4	Project		TechPu	ubs	a
<ul> <li>Hi-Tunes (2)</li> <li>Lineage Demo (14)</li> </ul>						
🛛 🚰 Project (4)						

- 3. In the Metadata Tree View pane, you can right-click a:
  - System: Use this option to run the analysis on all the columns under a system.
  - Environment: Use this option to run the analysis on all the columns under an environment.
  - Table: Use this option to run the analysis on all the columns under a table.

For example, the following image displays the available options when you click a system.



## 4. Click Column Gap Analysis.

The Column Gap Analysis page appears.

Performing Column Gap Analysis

Column Gap Analysis	_ <b>×</b>
	🛛 🖾
A Projects	A
▲ 💽 ♣ ABC (3)	
► 🔽 🔜 Mappings	
▶ 🔲 💵 batter (0)	
▶	
DigitalAdoption (8)	
▶	
▶ 🔲 ∎∎ ffgg (2)	
FlowTest (3)	
▶ 🔲 📲 Hi-Tunes (2)	
▶ 🔲 ∎∎Lineage Demo (14)	
Project (4)	
▶ □ ■ project 1 (4)	
Project Tech Pubs (8)	
▶ 🔲 💵 Tech Pubs Online (6)	
TechPubs (6)	-

- 5. Select projects and mappings.
- 6. Click 🔽.

The Column Gap Analysis Report for the selected projects and mappings appears.

## Performing Column Gap Analysis

			Column Gap Ana	lysis Report		
		sult For PROJECT(S) : Erv	vin_Sales			
Colur	mns not existing on a	ny Mapping				
#	System Name	Environment Name	Table Name		Column Name	
1	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCEID	
2	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCENAME	
3	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCEDESC	
4	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCECELLPHONE	
5	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCEHOMEPHONE	
5	Erwin_Sales	Integration_Target	dbo.RM_RESOURCE		RESOURCEEMAIL	
7	Erwin_Sales	N_Environment	dbo.RM_PROJECT		PROJECTID	
В	Erwin_Sales	N_Environment	dbo.RM_PROJECT		RESOURCEID	
9	Erwin_Sales	N_Environment	dbo.RM_PROJECT		PROJECTNAME	
10	Erwin_Sales	N_Environment	dbo.RM_PROJECT		PROJECTDESC	
11	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCE_ID	
12	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCENAME	
13	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCEDESC	
14	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCECELLPHONE	
15	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCEHOMEPHONE	
16	Erwin_Sales	N_Environment	dbo.RM_RESOURCE		RESOURCEEMAIL	
	Source Columns o	existing on Mapping withou	t valid Target (with or without BR)	(or) Target Columns liste	d on Mapping without BR (Witho	ut Source Col)
#	System Name En	vironment Table Name	Column Name	Project Name	Map Name	Usage

# **Running Impact Analysis**

A technical asset may act as a source, target, or both in mappings. After mapping source metadata to target metadata, you can run impact analysis on the technical assets. Impact analysis helps you understand upstream and downstream dependencies of technical assets and their impacts linked to business assets. It helps you assess the impact of transformations and source or target-level changes. Apart from this, you can also, view lineages based on selected assets and export its impact analysis.

You can run impact analysis at the following levels:

- System
- Environment
- Table
- Column

# **Running Lineage Analysis**

After mapping source metadata with target metadata, you can run the lineage analyzer on the mapping through the Mapping Specification grid. The generated data lineage report helps you trace the data's origin, its transformations, and its destination after source to target mappings.

You can run the lineage at the following levels:

- System
- Environment
- Table
- Column

# System

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

This topic walks you through the following:

- Viewing Lineage
- Working on Lineage

## **Viewing Lineage**

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

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

The Mapping Specification grid appears.

۰.	Μ	lapping Specificat	ion Graphica	al Designer Te	est Specification	Workflow Log				
2	ġ.	is = 📚	[Data Integrat	ion]			Pr	ofiles: Mapping_D	esigner_Profil 🔻	🔅 🗟 👯 🗟 < I
#		Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Ta Nullable Flag E Va
	1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	0	
	2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	nvarchar	40	0	0	
	3	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	nvarchar	30	0	0	
	4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	nvarchar	30	0	0	
	5	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	nvarchar	60	0	0	
	6	SQLTechPubs	SQLTechPubs	dbo.Customers	City	nvarchar	15	0	0	

3. Select a row.

## 4. Right-click a system and hover over Lineage Analyzer.

The options available for Lineage Analyzer appear.

#		Target Sy Name	stem	Target Environment Name	Targ Nam	et Table e	Target Column Name	Target Column Data Type	Target Column Length
	1	SQLTechPu	ıbs	SQLTechPubs	dbo.C	ustomers	CustomerID	nchar	5
	2	SQLTechł	A For	nt Color nt Styles ckground Color	,	istomers	CompanyName	nvarchar	40
	3	SQLTechf	_	nt Size ar Formatting pact Analysis Report	•	istomers	ContactName	nvarchar	30
	4		Ext	eage Analyzer ended Properties are Link	•	Forwa		archar	30
	5	SOL TechPi	ihs	SOI TechPubs	dbo C	ustomers	Address	nvarchar	60

- 5. Hover over any one of the following:
  - **Forward**: Use this option to view forward lineage.
  - **Reverse**: Use this option to view reverse lineage.
  - **Dual Combined View**: Use this option to view combined forward and reverse lineage.

For example, when you hover over Forward, All Projects and By Project appear as options.

#	Target Sys Name	stem Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target ( Length
1	SQLTechPu	bs SQLTechPubs	dbo.Customers	CustomerID	nchar	5
2	2 SQLTechPu	Font Styles	tomers	CompanyName	nvarchar	40
3	3 SQLTechPu	A Font Size Clear Formatting Impact Analysis Rep	tomers	ContactName	nvarchar	30
4	SQLTechPı	Lineage Analyzer  Extended Properties  Share Link			All Proje	_

## 6. Use the following options:

## **All Projects**

Use this option to include all the projects in lineage analysis.

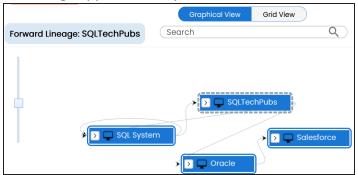
## **By Project**

Use this option to select projects for lineage analysis.



By default, all projects are selected. Clear the check boxes for the projects that are not required. Then, click

The system's forward lineage is generated based on the options you selected. Similarly, you can generate reverse, and dual lineage for a system. By default, the lineage appears in Graphical View.



- 7. You can click Graphical View or Grid View to switch between them:
  - **Graphical View**: The graphical view displays the lineage of a system in a graphical format. Selecting a system on the graphical view displays its Legends. Hovering over a system displays an ● icon. Clicking this icon opens the object's

### properties.

Graphical View Grid View	Graphical View Grid View			Metadata Properties ()			
Dual Lineage: SQLTechPubs	> Legend Systems	Business	Technical	Extended Properties			
	Environments @ Oracle	Sensitive Data Indica	Ŧ	Business Purpose <iframe <="" id="editorembed" th=""></iframe>			
		Data Steward		Sensitive Data Indicato			

**Grid View**: The grid view displays the lineage of a system in a tabular format. You can view the source and target system associated with the selected system.

<u>د ع</u>	QLTechPubs Graphical V	ew Grid View					
Dual	Dual Lineage: SQLTechPubs						
#	Source System Name	Target System Name					
1	TABLEUAU	SQLTechPubs					
2	Informatica	Informatica					
3	SQL System	SQL System					
4	SQL System	SQLTechPubs					
5	erwin DM	erwin DM					
6	SAP	SAP					

Use the following options to work on the lineage in graphical view:

## Search ( $^{ extsf{Q}}$ )

Use this option to search for systems that you want to see on the lineage.

Type in the search box to see a list of related systems that are available on the lineage.

Dual Lineage: Oracle $\rightarrow$ TechPubs	s		Q	) ∇ <sup>(</sup> ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) (
	SQLTechPubs	System		
	<b>TechPubs</b> Oracle	Environment		
	Salesforce	System		
	SQLTechPubs		icle TechPubs	Salesforce

# Filter Objects (abla)

Use this option to filter and display required systems in the lineage view.

Filter Objects	G	×
🗸 TABLEUAU		
SQLTechPubs		
Oracle		
✓ Salesforce		

The unselected objects are replaced with black dots on the lineage diagram.



# Switch View ( 🖑 )

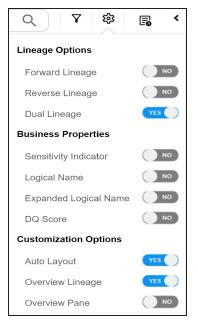
Double-click an object to see Switch View option. Use this option to switch the level of objects displayed and see the system, environment, or table in which the object is located.

```
System
```

Q 7 @ :	袋
Level	
System Level	YES
Environment Level	NO
Table Level	NO
Default	NO

# Options (🏟)

Use this option to view lineage types, business properties, and customizations options. For more information on lineage options, refer to the <u>Working on</u> <u>Lineage</u> section.

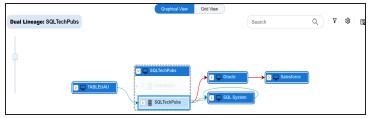


Export ( 🗟 )

Use this option to export the lineage. Click 🗟 and use the following options:

- Image (2): Use this option to download the lineage as an image, in the .JPG format. Ensure that you expand the required nodes in a lineage before downloading the lineage as image.
- PDF ( PDF ( PDF ): Use this option to download the lineage report in the .PDF format. Ensure that you expand the required nodes in a lineage before downloading the lineage report as PDF.
- Excel ( ): Use this option to download the lineage report in the .XLSX format. Ensure that you expand the required nodes in a lineage before downloading the report.

On the lineage, expand a system node, and select an environment to view its lineage path. The environment is highlighted in orange color, its forward lineage path appears in red, and its reverse lineage path appears in blue. Systems that are not part of a lineage path disappear.



Right-click a path around the selected object to highlight its path of the source or target in the lineage.

## Working on Lineage

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

Use the following options to work on lineage:

## **Forward Lineage**

Use this option to view forward lineage of the system.

System
--------

	Graphical View	Grid View
Forward Lineage: SQLTechPubs	Search	٩ )
SQL Syst	SQLTE	chPubs

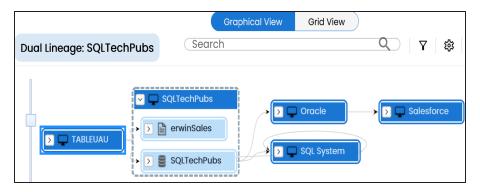
## **Reverse Lineage**

Use this option to view reverse lineage of the system.

	Graphical View	Grid View
Reverse Lineage: SQLTechPubs	Search	۹
TABLEUAU	→ 🖵 SQLTechPubs	SQL System

### **Dual Lineage**

Use this option to view dual lineage, which includes both forward and reverse lineage of the system.



## **Sensitivity Indicator**

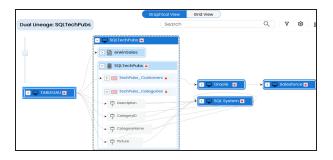
Use this option to view sensitivity of the environments in the lineage. You can expand a system node to view sensitive environments. The sensitive system and environments are indicated using **a**.

	Graphical View Grid View	
Dual Lineage: SQLTechPubs	Search	Q 7 🕸
TABLEUAU B	✓     SQLTechPubs ■       >     ■       >     ■       >     ■       >     ■       >     ■       SQL System ■	Salesforce

### Logical Name

Use this option to view expanded logical names of the tables and columns in an environment in the lineage. You can expand a system node to view environments and tables.

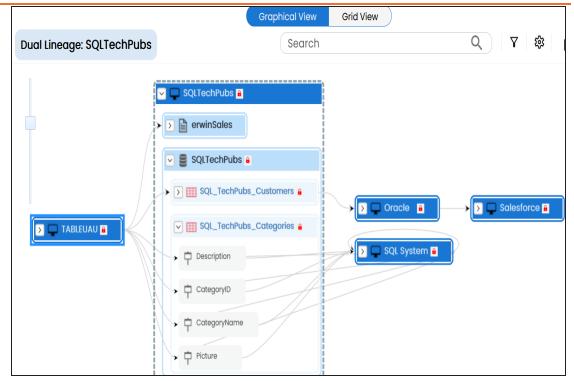
For example, the following image displays the table's logical name in the lineage.



## **Expanded Logical Name**

Use this option to view expanded logical names of the tables and columns in an environment in the lineage. You can expand a system node to view environments, tables, and columns. For more information, on configuring extended properties of a system, refer to the <u>System</u> topic

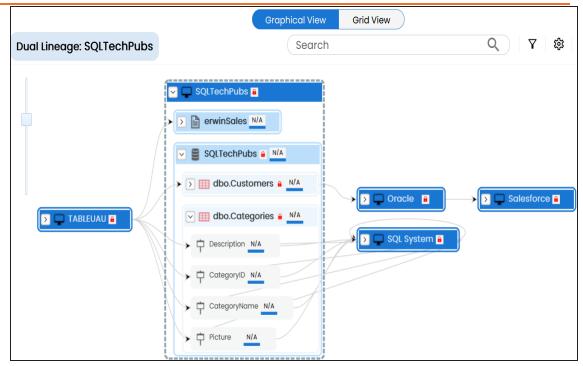
For example, the following image displays the table's expanded logical name in the lineage.



## **DQ Tool Score**

Use this option to view the data quality score of the environments, tables, and columns in the lineage. You can expand a system node to view data quality scores for environments, tables, and columns.

For example, the following image displays the data quality score in the lineage.



### Auto Layout

Use this option to rearrange the layout of the lineage automatically. For example, the following image displays the rearranged object layout with respect to the previous screenshot.

	Graphical View	Grid View
Dual Lineage: SQLTechPubs	Search	Q 7 3
	SQLTechPubs   SQLTechPubs   SQLTechPubs   SQLTechPubs   dbo.Customers   M/A   Obscription   Description   N/A   CategoryID   N/A   CategoryID   N/A   Picture   N/A	Oracle

### **Overview Lineage**

Use this option to view the lineage excluding systems and environments that do not exist in the Metadata Manager. When this option is switched off, the views include systems and environments, that do not exist in the Metadata Manager.

For example, the following image displays lineage excluding assets that do not exist in Metadata Manager.

Dual Lineage: SQLTechPubs	Graphical View Grid Vie Search	w Q 7 袋
	LTechPubs	Salesforce

### **Overview Pane**

Use this option to remove the lineage overview pane from the graphical view.

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

This topic walks you through the following:

- Viewing Lineage
- Working on Lineage

## **Viewing Lineage**

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

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

The Mapping Specification grid appears.

•	Mapping Specificat	ion Graphic	al Designer Te	est Specification	Workflow Log				
28	I 🔯 II 🍣	[Data Integrat	ion]			Pro	ofiles: Mapping_D	esigner_Profil -	🗘 🗟 👫 🗐 < 1
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Ta Nullable Flag E Va
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	0	
2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	nvarchar	40	0	0	
3	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	nvarchar	30	0	0	
4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	nvarchar	30	0	0	
5	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	nvarchar	60	0	0	
6	SQLTechPubs	SQLTechPubs	dbo.Customers	City	nvarchar	15	0	0	

3. Select a row.

4. Right-click an environment and hover over Lineage Analyzer.

# Target Column **Target Column** Target System Target Target Table Targe Environment Data Type Name Name Name Leng Name 1 SQLTechPubs SQLTechPubs CustomerID 5 dbo.Customers nchar A Font Color A Font Styles , 2 SQLTechPubs SQLTechPu vName nvarchar 40 Background Color A Font Size , E Clear Formatting SQLTechPu 3 SQLTechPubs 30 Jame nvarchar Impact Analysis Report . 📊 Lineage Analyzer . Forward Extended Properties SQLTechPu Reverse 4 SQLTechPubs Share Link Dual - Combined View

The options available for Lineage Analyzer appear.

- 5. Hover over any one of the following:
  - Forward: Use this option to view forward lineage.
  - **Reverse**: Use this option to view reverse lineage.
  - Dual Combined View: Use this option to view combined forward and reverse lineage.

For example, when you hover over Reverse, All Projects and By Project appear as options.

٠

#	Target System Name	Target Environment Name	Target Table Name	Targe Name	t Column	Target Column Data Type	Target Colum Length	n Target Precis
	1 SQLTechPubs	SQLTechPubs	dbo.Customers Font Color	Custon	nerID	nchar	5	0
	2 SQLTechPubs	SQLTechF	Font Styles Background Color		nyName	nvarchar	40	0
	3 SQLTechPubs	SQLTechF	Font Size Clear Formatting Impact Analysis Report		tName	nvarchar	30	0
	4 SQLTechPubs	SQLTechF 🖪	Lineage Analyzer Extended Properties Share Link	,	Forwa		<ul> <li>All projet</li> <li>By Projet</li> </ul>	

6. Use the following options:

### **All Projects**

Use this option to include all the projects in lineage analysis.

### **By Project**

Use this option to select projects for lineage analysis.



By default, all projects are selected. Clear the check boxes for the projects that are not required. Then, click

The environment's reverse lineage is generated based on the options you selected. Similarly, you can generate forward, and dual lineage for an environment. By default, the lineage appears in Graphical View.

	Graphical View Grid View	
Reverse Lineage: SQLTechPubs	Search	Q 7 🕸
erwinDoc	-> 🕥 📄 erwinSales	کل System SQL Env

- 7. You can click **Graphical View** or **Grid View** to switch between them:



• **Grid View**: The grid view displays the lineage of the environment system in a tabular format. You can view the source and target system and environment

#### associated with the selected environment.

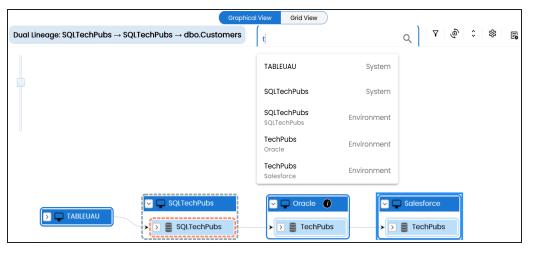
•SQ	SQLTechPubs Graphical View Grid View							
Dual Li	ineage: SQLTechPubs $\rightarrow$ SQLTechPubs							
#	Source System Name	Source Environment Name	Target System Name	Target Environment Name				
1	SQLTechPubs	SQLTechPubs	SQL System	TechPubs				
2	SQL System	Northwind	SQL System	Northwind				
3	SQL System	TechPubs	SQL System	Northwind				
4	SQLTechPubs	SQLTechPubs	Oracle					
5	TABLEUAU		SQLTechPubs	SQLTechPubs				

Use the following options to work on the lineage in graphical view:

## Search ( $^{Q}$ )

Use this option to search for environments that you want to see on the lineage.

Type in the search box to see a list of related environments that are available on the lineage.



## Filter Objects (abla)

Use this option to filter and display required environments in the lineage view.

Filter Objects	C	-	×
SQL System			
SQLTechPubs			
erwinSales			
SQLTechPubs			
✓ Oracle			
✓ Salesforce			

The unselected objects are replaced with black dots on the lineage diagram.



# Switch View ( 🖑 )

Double-click an object to see Switch View option. Use this option to switch the level of objects displayed and see the system, environment, or table in which the object is located.

	Q 7 @	令 發
	Level	
	System Level	YES
	Environment Level	NO
	Table Level	NO
	Default	NO
Optio	ns ( <b>©</b> )	

Use this option to view lineage types, business properties, and customizations options. For more information on lineage options, refer to the <u>Working on</u> Lineage section.

Q 7 🕸	E <
Lineage Options	
Forward Lineage	NO
Reverse Lineage	NO
Dual Lineage	YES
Business Properties	
Sensitivity Indicator	NO
Logical Name	NO
Expanded Logical Name	NO
DQ Score	NO
Customization Options	
Auto Layout	YES
Overview Lineage	YES
Overview Pane	NO

## Export (🗟)

Use this option to export the lineage. Click 🗟 and use the following options:

- Image (2): Use this option to download the lineage as an image, in the .JPG format. Ensure that you expand the required nodes in a lineage before downloading the lineage as image.
- PDF ( >>>: Use this option to download the lineage report in the .PDF format. Ensure that you expand the required nodes in a lineage before downloading the lineage report as PDF.
- Excel (): Use this option to download the lineage report in the .XLSX format. Ensure that you expand the required nodes in a lineage before downloading the report.

On the lineage, expand a system node, and select a table to view its lineage path. The environment is highlighted in blue color, its forward lineage path appears in red, and its reverse lineage path appears in blue. Systems and

in entre that are not part of a meage path anappean	
Graphical View Grid View	
ual Lineage: SQLTechPubs $\rightarrow$ SQLTechPubs $\rightarrow$ dbo.Customers $t$	5
SQLTechPubs SQLTechPubs SQLTechPubs Cracle Salesforce Salesforce StechPubs	

environments that are not part of a lineage path disappear.

Right-click a path around the selected object to highlight its path of the source or target in the lineage.

## Working on Lineage

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

Use the following options to work on lineage:

## **Forward Lineage**

Use this option to view forward lineage of the environment.

	Graphical View	Grid View
Forward Lineage: SQLTechPubs	Search	Q Y
SQLTechPubs	Oracle	Salesforce Salesforce TechPubs

## **Reverse Lineage**

Use this option to view reverse lineage of the environment.

	Graphical View Grid View	
Reverse Lineage: SQLTechPubs	Search	Q 7 🕸
	SQLTechPubs	TechPubs

### **Dual Lineage**

Use this option to view dual lineage, which includes both forward and reverse lineage of the environment.

	Graphical View Grid View	
Dual Lineage: SQLTechPubs	Search	Q 7 錄
Image: servinDoc         Image: servinDoc	Image: Contraction     Image: Contraction       Image: Contraction     Image: Contraction <th>&gt; D Northwind</th>	> D Northwind

## **Sensitivity Indicator**

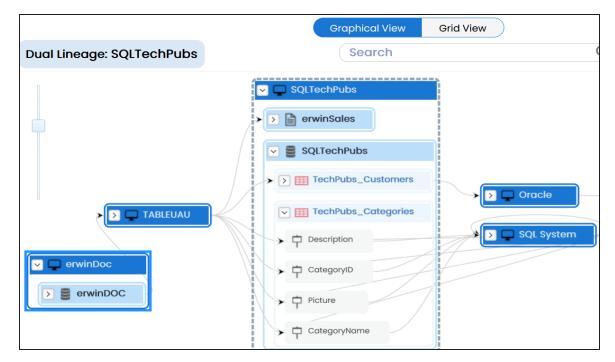
Use this option to view sensitivity of the environments in the lineage. You can expand the environment node to view sensitive tables. The sensitive assets are indicated using •.

		Graphical View	Grid View	
Dual Lineage: SQLTec	hPubs	Search		Q 7 \$\$
	<ul> <li>SQLTechPubs</li> <li>SQLTechPubs</li> <li>SQLTechPubs</li> <li>SQLTechPubs</li> <li>Official dbo.Customers</li> <li>Modo.Customers</li> <li>Modo.Categories</li> </ul>	Oracle       SQL System       SQL Env	>     Salesforce       >     >       >     >       >     >       >     >       >     >	> S Northwind a

### Logical Name

Use this option to view expanded logical names of the tables and columns in an environment in the lineage. You can expand a system node to view environments and tables.

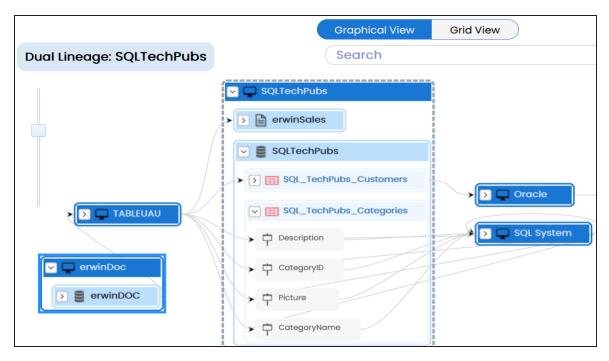
For example, the following image displays the table's logical name in the lineage.



### **Expanded Logical Name**

Use this option to view expanded logical names of the tables and columns in an environment in the lineage. You can expand a system node to view environments, tables, and columns.

For example, the following image displays the table's expanded logical name in the lineage.



## **DQ Tool Score**

Use this option to view the data quality score of the environments, tables, and columns in the lineage. You can expand a system node to view data quality scores for environments, tables, and columns.

For example, the following image displays the data quality score in the lineage.

	Graphical View	Grid View
Dual Lineage: SQLTechPubs	Search	Q 7 \$\$
erwinDoc erwinDoc erwinDoc erwinDoc erwinDoc	RTechPubs erwinSales N/A SQLTechPubs_N/A I SQL_TechPubs_Customers N/A SQL_TechPubs_Cotegories N/A	D Oracle
		TechPubs N/A

### Auto Layout

Use this option to rearrange the layout of the lineage automatically. For example, the following image displays the rearranged object layout with respect to the previous screenshot.

	Graphical View Grid View	)
Dual Lineage: SQLTechPubs	Search	Q Y 🕸 🖪
erwinDoc     erwinDoc     SqLTechPubs     erwinSales WA     SqLTechPubs NA	Oracle     Sql System	
> 3 III SQL_TechPubs_Cu > 3 III SQL_TechPubs_Cu > 3 III SQL_TechPubs_Co	SQL Env N/A	Image: State

### **Overview Lineage**

Use this option to view the lineage excluding systems and environments that do not exist in the Metadata Manager. When this option is switched off, the views include systems and environments, that do not exist in the Metadata Manager.

For example, the following image displays lineage excluding assets that do not exist in Metadata Manager.

Dual Lineage: SQLTechPubs	Graphical View Grid View Search	Q 7 🕸
TABLEUAU PRESENTATION LAYER	SQLTechPubs     Salesforce       Image: SQLTechPubs     Image: SQLTechPubs       SQLTechPubs     Image: SQLTechPubs       Image: SQLTechPubs     Image: SQL System       Image: SQL System     Image: SQL System	Northwind

### **Overview Pane**

Use this option to remove the overview pane from the graphical view.

# Table

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

This topic walks you through the following:

- Viewing Lineage
- Working on Lineage

# **Viewing Lineage**

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

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

The Mapping Specification grid appears.

۰.	Μ	lapping Specificat	ion Graphic	al Designer Te	est Specification	Workflow Log				
2	ŧ	is =	[Data Integrat	ion]			Pr	ofiles: Mapping_D	esigner_Profil 🔻	ا > 🖻 💦 🔊 🕹
#		Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Ta Nullable Flag E' Va
	1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	0	
	2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	nvarchar	40	0	0	
	3	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	nvarchar	30	0	0	
	4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	nvarchar	30	0	0	
	5	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	nvarchar	60	0	0	
	6	SQLTechPubs	SQLTechPubs	dbo.Customers	City	nvarchar	15	0	0	

3. Select a row.

### Table

## 4. Right-click a table and hover over Lineage Analyzer.

The options available for Lineage Analyzer appear.

#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Colu Data Type	mn Target Column Length	Target Precis
1	1 SQLTechPubs	SQLTechPubs	dbo.Customers		nchar	5	0
2	2 SQLTechPubs	SQLTechPubs	dbo.Custome	A Font Color A Font Styles Background Color	•	40	0
3	3 SQLTechPubs	SQLTechPubs		☆ Font Size Elear Formatting Impact Analysis Re	eport	30	0
4	4 SQLTechPubs	SQLTechPubs		Lineage Analyzer Extended Propertie Ghare Link	es 🚺	Forward     Reverse     Dual - Combined View	) ) )

- 5. Hover over any of the following:
  - Forward: Use this option to view forward lineage.
  - **Reverse**: Use this option to view reverse lineage.
  - **Dual Combined View**: Use this option to view combined forward and reverse lineage.

For example, when you hover over Dual - Combined View, All Projects and By Project appear as options.

Table

#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target C Data Typ		Target Precis	Column Target ion Scale
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	0
2	SQLTechPubs	SQLTechPubs	dbo.Custome	Font Color Font Styles Background Color	,	40	0	0
3	SQLTechPubs	SQLTechPubs	dbo.Custome	▲ Font Size ■ Clear Formatting ■ Impact Analysis Rep	, port	30	0	0
4	SQLTechPubs	SQLTechPubs	dbo.Custome	Lineage Analyzer Extended Propertie:	• S	Forward Reverse	• •	0
5	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	nvarchar	60	_	By Project

6. Use the following options:

### **All Projects**

Use this option to include all the projects in lineage analysis.

### **By Project**

Use this option to select projects for lineage analysis.



By default, all projects are selected. Clear the check boxes for the projects that are not required. Then, click

The table's dual lineage is generated based on the options you selected. Similarly, you can generate forward, and reverse lineage for tables. By default, the lineage appears in Graphical View.

Dual Lineage: SQLTechPubs		Search
	SQLTechPubs	
TABLEUAU	SQLTechPubs	Salesforce
Account	Decustomers	□ Oracle     □ ■ TechPubs       → > ■ Account
	► D dbo.Categories	Normality Account

- 7. You can click Graphical View or Grid View to switch between them:
  - Graphical View: The graphical view displays the lineage of the table in a graphical format. Selecting a table on the graphical view displays its Legends. Hovering over a table displays an ● icon. Clicking this icon opens the object's properties. For more information on updating table properties, refer to the <u>Updating Table Properties</u> topic.

Dual Lineage: SQLTechPubs		Search	Q 7 🕸 E	> Legend	
				Systems System	
	SQLTechPubs			Environments MS MS Excel File SQ Sql Server SA Salesforce	
	Comparison     C			Tables TA Table	
				Columns CO Column Metadata Properties 0	
		SQL System		Business Technical Extended Properties	
PRESENTATION LAYER      Account	🕆 city	Oracle		Table Definition	Table Comments
	CompanyAtome     CompanyAtome     Constituente     Constituente     Constituente     Constituente     Constituente	> > III Account		Logicel Table Name TechPubs_Customes	Physical Table Name
				Sensitive Optio Indicator (KD) Classification	Sensitive Data Indicator (SDI) Description
	> III dbo.Categories			Table Class	Table Alias
	······································			Data Steward	
				User Defined-1	Usir Defined-2

**Grid View**: The grid view displays the lineage of the table in a tabular format. You can view the source and target system, environment, table, and column associated with the selected table.

dbo.Cus	dbo Customers Graphical View Graphical View									
Dual Linea	Dual Lineage: SQLTechPubs → SQLTechPubs → dbo.Customers									
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Target System Name	Target Environment Name	e Target Table Name	Target Column		
1	erwinDoc	erwinDOC	CustDetails		TABLEUAU					
2	Oracle				Salesforce	TechPubs	Account			
3	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	Oracle					
4	TABLEUAU				SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName		
5	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	Oracle					
6	SQLTechPubs	SQLTechPubs	dbo.Customers	Region	Oracle					
7	TABLEUAU				SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName		

Use the following options to work on the lineage in graphical view:

# Search ( $^{ extsf{Q}}$ )

Use this option to search for tables that you want to see on the lineage.

Type in the search box to see a list of related tables that are available on the lineage.

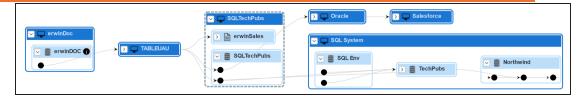
	Graphical View Grid View
Dual Lineage: SQLTechPubs	(a Q)
	Oracle System
	TABLEUAU System
TABLEUAU	Salesforce System
	square sq
SQLTechPubs	Account
erwinSales	SQLTechPubs → Table ✓
Account	SQL Env
SQLTechPubs	► D III dbo.Categories

## Filter Objects ( $m{\gamma}$ )

Use this option to filter and display required tables in the lineage view.

Filter Objects	C	•	X
SQLTechPubs			
Vacle			
▶ 🗸 SQL System			
🗸 TABLEUAU			
▶ 🗹 erwinDoc			
✓ Salesforce			
Table Business Entity Types			
TABLE			

The unselected objects are replaced with black dots on the lineage diagram.



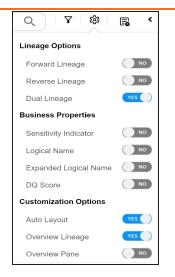
# Switch View ( 🖑 )

Double-click an object to see Switch View option. Use this option to switch the level of objects displayed and see the system, environment, or table in which the object is located.

Q 7 @ \$	鐐
Level	
System Level	YES
Environment Level	NO
Table Level	NO
Default	NO

## Options (🕸)

Use this option to view lineage types, business properties and customizations options. For more information on lineage options, refer to the <u>Working on</u> <u>Lineage</u> section.

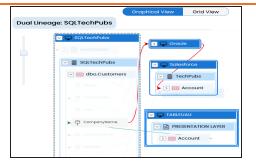


# Export (🗟)

Use this option to export the lineage. Click 🗟 and use the following options:

- Image (2): Use this option to download the lineage as an image, in the .JPG format. Ensure that you expand the required nodes in a lineage before downloading the lineage as image.
- PDF ( PDF ( PDF ): Use this option to download the lineage report in the .PDF format. Ensure that you expand the required nodes in a lineage before downloading the lineage report as PDF.
- Excel ( ): Use this option to download the lineage report in the .XLSX format. Ensure that you expand the required nodes in a lineage before downloading the report.

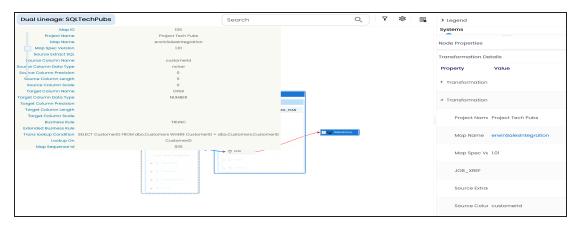
On the lineage, expand a table node, and select a column to view its lineage path. The column is highlighted in blue color, its forward lineage path appears in red, and its reverse lineage path appears in blue. The assets that are not part of a lineage path disappear.



Click a path around the selected object to highlight its path of the source or target in the lineage.

### **Viewing Transformations**

Transformations between columns are indicated using  $\clubsuit$  in the lineage. Hover over  $\diamondsuit$  to view transformation rules for the columns on a pop-up. Or, click the path between the columns to highlight it to view detailed transformations between them in the Transformation Details pane.



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

## Working on Lineage

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

Use the following options to work on lineage:

### Forward Lineage

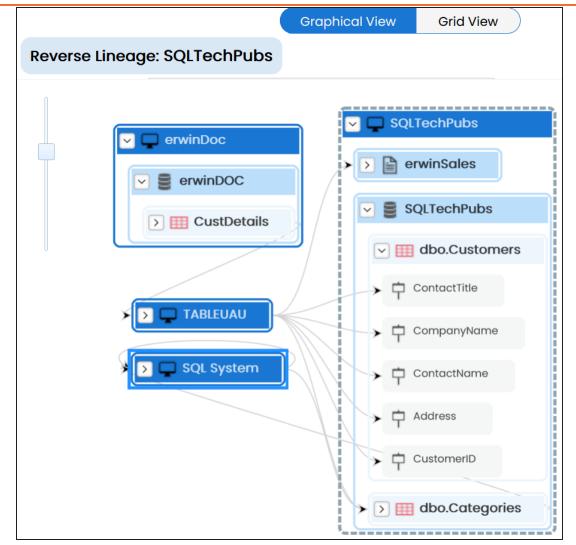
Use this option to view forward lineage of the table.

	(	Graphical View	Grid View	
Forward Lineage: SQLTech	Pubs			
SQLTechPubs				
SQLTechPubs		👂 🖵 SQL Sy	rstem	
🖂 🎹 dbo.Custor	ners			
🛱 Region		🔽 🖵 Oracle		
		🖂 🛢 TechPut	S	
City	Ţ City		DSSYS.WLM_CLAS	SIFIER_PLAN
	•			
ContactName		Salesfo		
P Address				
🖌 💓 🌐 dbo.Catego				

### **Reverse Lineage**

Use this option to view reverse lineage of the table.

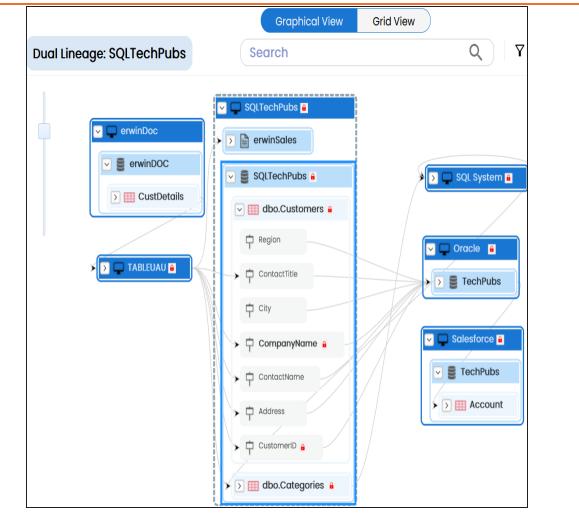
```
Table
```



### **Dual Lineage**

Use this option to view dual lineage, which includes both forward and reverse lineage of the table.





### **Sensitivity Indicator**

Use this option to view sensitivity of the table in the lineage. You can expand the table node to view sensitive columns. The sensitive assets are indicated using •.

	Graphical View	Grid View
Dual Lineage: SQLTechPubs	Search	Q 7 \$
erwinDoc	Search	Q Y \$
	Address	> Carteria Account
	CustomeriD     O	

### **Logical Name**

Use this option to view expanded logical names of the tables and columns in an environment in the lineage. You can expand a system node to view environments and tables.

For example, the following image displays the table's logical name in the lineage.

	Graphical View	Grid View
Dual Lineage: SQLTechPubs	Search	Q 7 \$
arwinDoc arwinDoc CustDetails	<ul> <li>SQLTachPubs</li> <li>SQLTachPubs</li> <li>SQLTachPubs</li> <li>SQLTachPubs</li> <li>TechPubs_Customers</li> <li>Region</li> <li>ContactTitle</li> <li>City</li> <li>ContactTitle</li> <li>City</li> <li>ContactNome</li> <li>Address</li> <li>Customerb</li> <li>Customerb</li> <li>TechPubs_Categories</li> </ul>	Sol System

### **Expanded Logical Name**

Use this option to view expanded logical names of the tables and columns in an environment in the lineage. You can expand a system node to view environments, tables, and columns. For more information on configuring extended properties of tables, refer to the <u>Table</u> topic.

For example, the following image displays the table's expanded logical name in the lineage.

	Graphical View Grid View	
Dual Lineage: SQLTechPubs	Search	Q 7 🕸
CustDetails	SQL TechHubs       SQL TechHubs       SQL TechHubs       SQL TechHubs       ContectRaw       City       ContectRaw       City       ContectRaw       City       ContectRaw       ContectRaw       ContectRaw       City       ContectRaw       ContectRaw	SQL System     SQL System     Oracle     TochPubs     TochPubs     TochPubs     TochPubs     Y I TochPubs     Y I Account

### **DQ Tool Score**

Use this option to view the data quality score of the environments, tables, and columns in the lineage. You can expand a system node to view data quality scores for environments, tables, and columns.

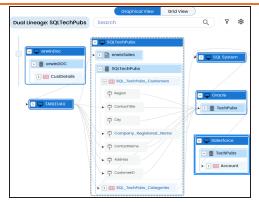
For example, the following image displays the data quality score in the lineage.

	Graphical View Grid View	$\bigcirc$
Dual Lineage: SQLTechPubs	Search	Q 7 🕸
erwinDoc	SQLTochPubs	
erwinDOC     CustDetails	SQLTechPubs_Customers_N/A  SQL_TechPubs_Customers_N/A	SQL System
> 🔽 🗖 TABLEUAU	Region N/A      ContactTitle N/A	Oracle     Oracle     Oracle     Oracle     Oracle     Oracle
	Company_Registered_Name N/A ContractName N/A	Salesforce
	↓     ↓ </th <th>Account N/A</th>	Account N/A
	SQL_TechPubs_Categories N/A	

### **Auto Layout**

Use this option to rearrange the layout of the lineage automatically.

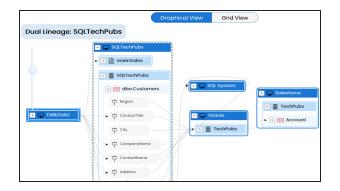
For example, the following image displays the rearranged object layout with respect to the previous screenshot.



### **Overview Lineage**

Use this option to view the lineage excluding systems and environments that do not exist in the Metadata Manager. When this option is switched off, the views include systems and environments, that do not exist in the Metadata Manager.

For example, the following image displays lineage excluding assets that do not exist in Metadata Manager.



#### **Overview Pane**

Use this option to remove the lineage overview pane from the graphical view.

# Column

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

This topic walks you through the following:

- Viewing Lineage
- Working on Lineage

## **Viewing Lineage**

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

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

The Mapping Specification grid appears.

۰.	Μ	apping Specificat	ion Graphic	al Designer Te	est Specification	Workflow Log				
	•	🗊 🗉	[Data Integrat	ion]			Pro	ofiles: Mapping_D	esigner_Profil -	🌣 🗟 👫 🖻 < (
#		Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Target Column Scale	Target Column Ta Nullable Flag E Va
	1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	0	
	2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	nvarchar	40	0	0	
	3	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	nvarchar	30	0	0	Y
	4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	nvarchar	30	0	0	Y
	5	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	nvarchar	60	0	0	Y
	6	SQLTechPubs	SQLTechPubs	dbo.Customers	City	nvarchar	15	0	0	Y

3. Select a row.

### 4. Right-click a column and hover over Lineage Analyzer.

The options available for Linear Analyzer appear.

#	Target System Name	Target Environment Name	Target Table Name	Target Coli Name	umn Target Column Data Type	Target Length	Column Target Column Precision	Targo Scalo
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	0
2	SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyNa	A Font Color A Font Styles Background Color	,	0	0
З	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactNan	A Font Size Clear Formatting Impact Analysis Rep	ort 🕨	0	0
4	SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	Lineage Analyzer Extended Properties	•	Forward Reverse Dual - Combined View	* * *
5	SQLTechPubs	SQLTechPubs	dbo.Customers	Address	nvarchar	60	0	0

- 5. Hover over any one of the following:
  - **Forward**: Use this option to view forward lineage.
  - **Reverse**: Use this option to view reverse lineage.
  - Dual Combined View: Use this option to view forward and reverse lineage of the column combined together.

For example, when you hover over the Reverse, All Projects and By Project appear as options.

#	Target System Name	Target Environment Name	Target Table Name		farget Column Iame	Target Column Data Type	Target Column Length	Target Precisi	Column on	Target Column Scale
1	SQLTechPubs	SQLTechPubs	dbo.Customers	Cı	ustomerID i	nchar	5	0		0
2	SQLTechPubs	SQLTechPubs	dbo.Customers	С	Font Styles Background	, Color	40	0		0
3	SQLTechPubs	SQLTechPubs	dbo.Customers	С	Clear Forma	tting sis Report 🔹	30	0		0
4	SQLTechPubs	SQLTechPubs	dbo.Customers	С	Lineage Ana		Forward Reverse	ed View		All projects By Project

6. Use the following options:

### **All Projects**

Use this option to include all the projects in lineage analysis.

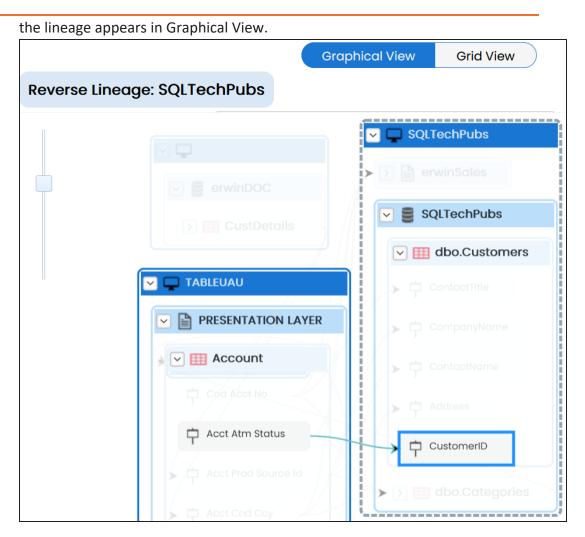
### **By Project**

Use this option to select projects for lineage analysis.

<b>≝</b> ×
🔺 🛃 🏭 Projects
🗹 <mark>न</mark> АВС
🗹 <mark>न</mark> DigitalAdoption
🗹 <mark>न</mark> erwinDIS
🗹 <mark>न</mark> Lineage Demo
🗹 <mark>-</mark> Project
🗹 <mark>न</mark> project 1
🗹 <mark>न</mark> Project Tech Pubs
🗹 <mark>न</mark> Tech Pubs Online
🗹 <mark>न</mark> TechPubs
🗹 <mark>न</mark> Test
🗹 <mark>न</mark> Test Source
🛃 <mark>न</mark> TestData Map
🗹 <mark>न</mark> TestMap
🛃 <mark>-</mark> WhatfixIntegration
MhatfixTrial 🛃

By default, all the projects are selected. Clear the check boxes for the projects that are not required. Then, click

The column's reverse lineage is generated based on the options you selected. Similarly, you can generate forward, and dual lineage for columns. By default,



- 7. You can click Graphical View or Grid View to switch between them:
  - Graphical View: The graphical view displays the lineage of the column in a graphical format. Selecting a column on the graphical view displays its Legends. Hovering over a column displays an 

     icon. Clicking this icon opens the object's properties. For more information on updating column properties, refer to the Updating Column Properties topic.

Dual Lineage: SQLTechPubs	Search Q V &	E → Legend Systems	
SQLTechPubs		System System	
> 2 📄 erwinSales		Environments MS MS Excel File SQ Sql Server	
TABLEUAU SQLTechPubs		SA Salesforce	
PRESENTATION LAYER		Tables	
Count	Salesforce	Columns C0 Column	
	Account	Metadata Properties	×
Acct Atm Status     Acct Prod Ecurse Id     Acct Prod Ecurse Id     Acct Prod Ecurse Id     Acct Prod Ecurse Id     Acct Prod Ecurse Id	► Parentid	Business Technicol Extended Properties	
Contractiveree		Column Definition	Column Comments
Number of Records	MasterRecordd	Logical Column Name	Physical Column Name
Customer/D	→ 中 M	Sensitive Data Industry (30) Classification	Sensitive Data Indicator (SDI) Description
> 🖂 📰 dbo.Categories	> C isDeleted	Column Closs	Column Alias
	► P Name		Dusiness Key Rog
		Data Steward	On one-weat undi
		Loar Defined-1	User Defined-2

Grid View: The grid view displays the lineage of the environment system in a tabular format. You can view the source and target system, environment, table, and column associated with the selected column.

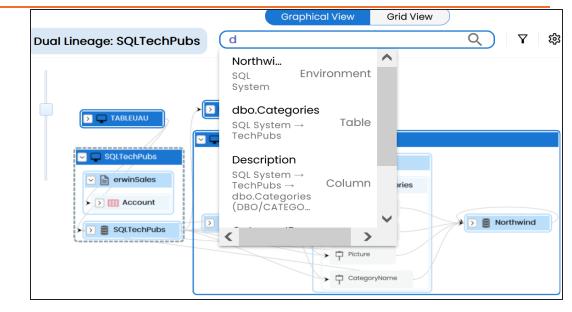
CustomerID Graphical View Grid View Dual Lineage: SQLTechPubs → SQLTechPubs → dbo.Customers → CustomerID							
#	Info	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Target System Name	Target Environment Name
1	0	TABLEUAU	PRESENTATION LAYER	Account	Acct Atm Status	SQLTechPubs	SQLTechPubs
2		SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	Oracle	TechPubs
3		Oracle	TechPubs	APPQOSSYS.WLM_CLA SSIFIER_PLAN		Salesforce	TechPubs

Use the following options to work on the lineage in graphical view:

## Search ( $^{Q}$ )

Use this option to search for columns that you want to see on the lineage.

Type in the search box to see a list of related columns that are available on the lineage.



## Filter Objects (abla)

Use this option to filter and display required columns in the lineage view.

Filter Objects	C 🖪 🗙
✓ Oracle	
✓ Salesforce	
🕨 🗹 SQL System	
SQLTechPubs	
▶ 🗹 TABLEUAU	
🔻 🗌 Table Business Entity Types	
TABLE	

The unselected objects are replaced with black dots on the lineage diagram.

TABLEUAU	SQLTechPubs	S Oracle
PRESENTATION LAYER	C SQLTechPubs	SQL System

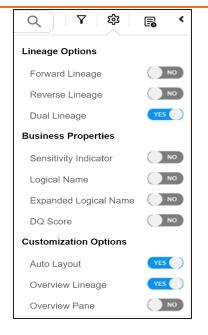
```
Switch View ( 🖑 )
```

Double-click an object to see Switch View option. Use this option to switch the level of objects displayed and see the system, environment or table in which the object is located.

Q Y D	\$ 錄
Level	
System Level	YES
Environment Level	NO
Table Level	NO
Default	NO

# Options (🕸)

Use this option to view lineage types, business properties and customizations options. For more information on lineage options, refer to the <u>Working on</u> <u>Lineage</u> section.

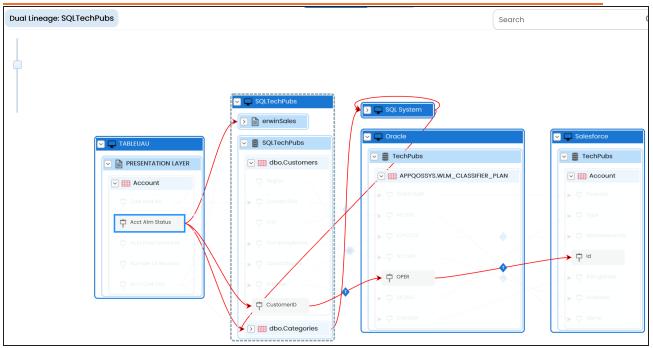


## Export (🗟)

Use this option to export the lineage. Click 🗟 and use the following options:

- Image (>>): Use this option to download the lineage as an image, in the .JPG format. Ensure that you expand the required nodes in a lineage before downloading the lineage as image.
- PDF ( PDF ( PDF ): Use this option to download the lineage report in the .PDF format. Ensure that you expand the required nodes in a lineage before downloading the lineage report as PDF.
- Excel ( ):Use this option to download the lineage report in the .XLSX format. Ensure that you expand the required nodes in a lineage before downloading the report.

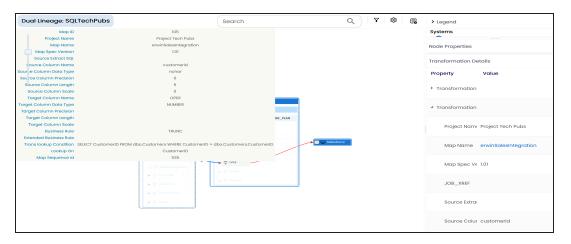
On the lineage, expand a table node, and select a column to view its lineage path. The column is highlighted in blue color, its forward lineage path appears in red, and its reverse lineage path appears in blue. Assets that are not part of a lineage path disappear.



Right-click a path around the selected object to highlight its path of the source or target in the lineage.

### **Viewing Transformations**

Transformations between columns are indicated using  $\clubsuit$  in the lineage. Hover over  $\diamondsuit$  to view transformation rules for the columns on a pop-up. Or, click the path between the columns to highlight it to view detailed transformations between them in the Transformation Details pane.



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

## Working on Lineage

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

Use the following options to work on lineage:

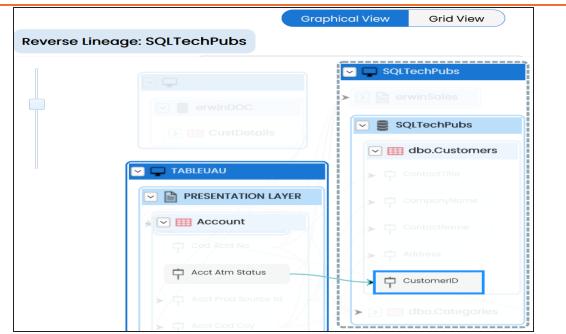
### **Forward Lineage**

Use this option to view forward lineage of the column.



### **Reverse Lineage**

Use this option to view reverse lineage of the column.



### **Dual Lineage**

Use this option to view dual lineage, which includes both forward and reverse lineage of the column.

Dual Lineage: SQLT	echPubs	Search	Q Y
	SQLTechPubs	🔽 🖵 Oracle	
Count	> 🕞 erwinSales	🕞 🛢 TechPubs	
	SQLTechPubs	CLASSIFIER_PLAN	Salesforce
Acct Atm Status	United States Interesting Inte		TechPubs
Acct Prod Source Id	Region		💌 🎹 Account
Acct Cod Ccy	ContactTitle		Parentid
P Number of Records	C city		♀ Туре
	> 🗘 CompanyName		→ Ţ Id
	> 🗘 ContactName		MasterRecord
	Address	Г снквим	BillingStreet

### **Sensitivity Indicator**

Use this option to view sensitivity of the columns in the lineage. You can expand the environment node to view sensitive columns. The sensitive assets are indicated using

		Graphical View Grid View	
Dual Lineage: SQLTec	hPubs Sear	ch	Q 7
V C) TABLEUAU 🔒			
PRESENTATION LAYER	🔽 🖵 SQLTechPubs 🔒	🔽 🖵 Oracle 🔒	Ì
V 🌐 Account 🔒	> 🕥 🖹 erwinSales	🕑 🛢 TechPubs	
Cod Acct No	SQLTechPubs a	APPQOSSYS.WLM_CLASSIFIER_PLAN	Salesforce 🔒
Acct Atm Status	V III dbo.Customers 🔒		Center Street TechPubs
Acct Prod Source Id 🝙	P Region		Count
Acet Cod Cey	> 🗘 ContactTitle		Parentid
📮 Number of Records 🍙	ф city		> 中 Туре
	CompanyName		DI 🖓
	ContactName		MasterRecordid
	► 中 Address	🕨 🕞 СНКЅЦМ	BillingStreet
	CustomerID a		
			► 中 Name
	► D III dbo.Categories 🔒		

### Logical Name

Use this option to view expanded logical names of the tables and columns in an environment in the lineage. You can expand a system node to view environments and tables.

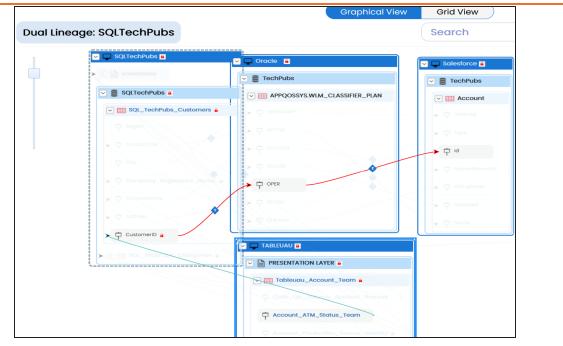
For example, the following image displays the table's logical name in the lineage.



### **Expanded Logical Name**

Use this option to view expanded logical names of the tables and columns in an environment in the lineage. You can expand a system node to view environments, tables, and columns. or more information on configuring extended properties of columns, refer to the <u>Column</u> topic.

For example, the following image displays the table's expanded logical name in the lineage.



### **DQ Tool Score**

Use this option to view the data quality score of the environments, tables, and columns in the lineage. You can expand a system node to view data quality scores for environments, tables, and columns.

For example, the following image displays the data quality score in the lineage.

	Graphical View	Grid View
Lineage: SQLTechPubs		Search
💭 SQLTechPubs 🔒	, Crocle	Salesforce 🛋
	TechPubs N/A	TechPubs N/A
SQLTechPubs a N/A		Account N/A
SQL_TechPubs_Customers	N/A > 3 TIMESTAMP N/A	> Porentid N/A
		> ₽ Type N/A
	> D NCLERS N/A	MosterRecordid N/
		> D BilingStreet N/A
	× 2 0000 NA	> Q InDeleted N/A
Address NA	× CORCEAN NAK	> D Nome N/A
	Tableuau_Account_Team 🎍 N/A	
	Cash_On_Delivery Account_Number_NIX	
	C Account_ATM_Status_Team N/A	

### Auto Layout

Use this option to rearrange the layout of the lineage automatically. For example, the following image displays the rearranged object layout with respect

to the previous screenshot.

	Graphical Vie	Grid View
Dual Lineage: SQLTechPubs	Searcl	h
SQLTechPubs 🗃		Salesforce 🖬
Image: Second	🕞 🛢 TechPubs	TechPubs
SQLTechPubs 🔒	CLASSIFIER_PLAN	Count
TechPubs_Customers	► 🛱 TIMESTAMP	> 🛱 Parentid
P Region		→ Ф туре
		на 🗘
₽ <sup>cn</sup> x		► 中 MasterRecordId
> Company_Reg_NAme	→ 中 OPER	BillingStreet
	► Q SEQNO	→ 中 IsDeleted
	СНКВИМ	> 中 Name
CustomeriD a		
► [} III TechPubs degories a	PRESENTATION LAYER	
	Tableuau_Account	
	P Cash_Or Dollvery_Account	
	Account_Production_Source_ID	

### **Overview Lineage**

Use this option to view the lineage excluding systems and environments that do not exist in the Metadata Manager. When this option is switched off, the views include systems and environments, that do not exist in the Metadata Manager.

For example, the following image displays lineage excluding assets that do not exist in Metadata Manager.



#### **Overview Pane**

Use this option to remove the lineage overview pane from the graphical view.

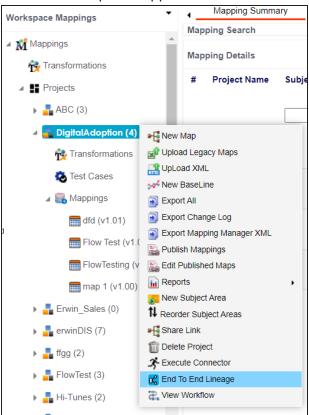
# **Running End to End Lineage**

You can run end to end lineage analysis at project level and trace the data between any two mapping projects. The end to end lineage report can be drilled down further to trace intermediate stages of data.

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

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

The available options appear.



3. Click End to End Lineage.

Running End to End Lineage

The Select Target page appears.



- 4. Select a target subject or a target project.
- 5. Click 🗹.

The End to End Lineage Summary page appears. You can drag and arrange column positions on the page for better visibility.

End T	To End	Lineage Sum	mary												a x
														-	ወ 🔊
#		Source Project	Source Subject	Source System	Source Environment	Source Table	Source XPath	Source Column	Source User Defined-1	Source User Defined-2	Source Valid Values	Target Column	Target XPath	Target User Defined-1	Targ Defi
1	F F	Project		TABLEUAU	PRESENTATION LAYER	Account		Acct Atm Status			Click Here				Î
2	<b>ا ا</b>	Project		TABLEUAU	PRESENTATION LAYER	Account		Cod Acct No			Click Here				
3	F F	Project		TABLEUAU	PRESENTATION LAYER	Account		Cod Acct No			Click Here				
4	The second se	Project		TABLEUAU	PRESENTATION LAYER	Account		Acct Prod Source Id			Click Here				
5	E ا	Project		TABLEUAU	PRESENTATION LAYER	Account		Acct Prod Source Id			Click Here				
6	<b>F</b> (	Project		TABLEUAU	PRESENTATION LAYER	Account		Acct Cod Ccy			Click Here				
7	F F	Project		Oracle	TechPubs	APPQOSSYS.WLM_CI		SEQNO			Click Here				
8	۳ F	Project		Oracle	TechPubs	APPQOSSYS.WLM_CL		TIMESTAMP			Click Here				
9	F F	Project		TABLEUAU	PRESENTATION LAYER	Account		Acct Cod Ccy			Click Here				
10	<b>F</b> (	Project		Oracle	TechPubs	APPQOSSYS.WLM_CL	L	CHKSUM			Click Here				

Use the following options to work on the End to End Lineage Summary page:

### Navigate

Use 🔿 or 年 to navigate.

## Expand (🖃)

To expand the lineage summary, use  $\square$ . The expanded summary shows the intermediate stages of data.

En	d To End Linea	nge De	etails [ Sou	rce: Acct	Atm Status	Target:	1							
														ወ
#	Project Name	Map Id	Map Name	Source System	Source Environmen	Source Table	Source Column	Source Valid Values	Business Rule	Extended Business Rule	Target Valid Values	Target XPath	Target Column	Tai
1	Project	69	Data Integratic	TABLEUAU	PRESENTATIO	Account	Acct Atm Status	Click Here			Click Here		CustomerID	dbo
2	Project Tech P	105	erwinSalesInte	SQLTechPub	SQLTechPubs	dbo.Customers	CustomerID	Click Here	TRUNC		Click Here		OPER	APF
3	erwinDIS	66	SalesforceInte	Oracle	TechPubs	APPQOSSYS.WLM_C	LOPER	Click Here	<u>UPPER</u>		Click Here		Id	Acc

# Reset Column Ordering (心)

Use this option to reset the column order on the page.

## Export (🕙)

Use this option to export the lineage summary in the XLSX format.

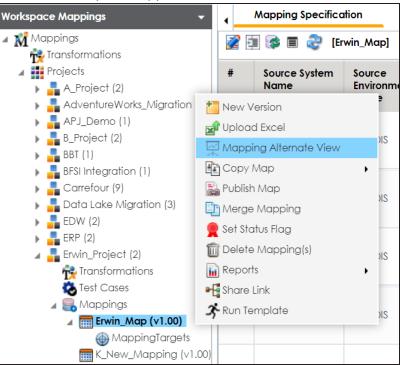
# **Opening Business View**

You can open a concise view of mappings with an ability to instantly generate lineage and impact analysis. It is an alternate view for both workspace and published maps and more suitable for business users.

To open business view of mappings, follow these steps:

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

The available options appear.



3. Click Mapping Alternate View.

The Mapping Summary page appears. It has two sections, Mapping Details and Mapping Specifications.

### **Opening Business View**

Ma	ipping S	ummary										
Mappir	ng Deta	ils									<b>S</b> <	4
pecifi	cation N	lame	Erwin_Map				Map Id		221			Τ
/ersion	ı		1.00				Version L	abel				
۸appir	ng Desc	ription	mapping descrip	tion								
arget	Tables		dbo.ADS New A	SSOCIATIONS			Source T	ibles	dbo.ADS ASSOCIA	TIONS		
QL QU	Jery						SQL Que	y Description				
arget	Update	Strategy					Map Spe	c Docs	View			
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lser De	efined1						User Defi	ned2				
lser De	efined3						User Defi	ned4				
Jser De	efined5						View all	Iser Defined Details				
Nappir	ng Spec	ification										
				Target Deta	ails				Tran	sformations		
#	Info	System	Environment	Table	Column	Data Type	e (L/P/S)	Business Rule		Extended Business Rule	System	
	=	New_Erwin	Erwin_Environmer	dbo.ADS New ASSO	ID New	bigint(8,19	,0)	ABS			erwinDIS	\$
	-	New_Erwin	Erwin_Environmer	dbo.ADS New ASSOC	SOURCE OBJECT ID New	bigint(8,19	,0)	ABS			erwinDIS	5
	=	New_Erwin	Erwin_Environmer	dbo.ADS New ASSO	SOURCE OBJECT TYPE ID	bigint(8,19	,0)	ABS			erwinDIS	ŝ
	=	New_Erwin	Erwin_Environmer	dbo.ADS New ASSO	TARGET OBJECT ID New	bigint(8,19	,0)	ABS			erwinDIS	3
	F	New_Erwin	Erwin_Environmer	dbo.ADS New ASSO	TARGET OBJECT TYPE ID	bigint(8,19	,0)	ABS			erwinDIS	3
												•

### **Mapping Details**

It displays mapping details that includes mapping specification name, version, target update strategy, and lists of target and source tables.

### **Mapping Specification**

It displays the Mapping Specification grid with source and target details.

Under the Mapping Details and Mapping Specification sections, you can click a <Table\_Name> or <Column\_Name> to view their respective details.

### **Table Details**

To view table details, on the Mapping Summary page, click <Table\_Name>.

The Table Details page appears. By default, the Impact Analysis tab opens. You can view direct, indirect, and other impacts of the table.

For more information on impact analysis, refer to the <u>Running Impact Analysis</u> topic.

### **Opening Business View**

Τα	ble Details							_ 🗆 ×
4	dbo.ADS_ASSOCIATIONS( Columns Table Pr	Data_Migration.erwinDIS)	Data Lineage Impact Analysis	Workflow Log Data Qu	ality Documents	Test Specification		
Sumn	nary - Direct Impact	< Sumi	mary - Indirect Impact	_	<	Audit Information		* 1
		As Source		4 2	Upstream Impact	Audit	Information	
		As Target			Downstream Impact	Created By	Administrator	^
			Indirect Impact		n Business Rule	Created Time	01/01/2020 11:43:01	~
<u>،</u>	Direct Impact Ind	rect Impact Other Impacts						•
As So	urce							^
#	Project Name	Mapping Name	Target Information					
			Table	Environment	System			
1	A_Project	Erwin_Map	dbo.ADS New ASSOCIATIONS	Data_Migration	erwinDIS		ABS	~
2	Erwin_Feb	Integration_Feb	dbo.RM_RESOURCE	Integration	Erwin_Sales			
3	Erwin_Project	Child_Map	dbo.ADS New ASSOCIATIONS	Data_Migration	erwinDIS			$\sim$
As Ta	rget							~
#	Project Name	Mapping Name	Source Information				Business Rule	
			Table	Environment	System			
				No Records Found				~
								~
(								>

You can click the following tabs to work on the Table Details page:

- **Data Lineage**: This tab displays the forward and reverse lineage of the table. For more information on lineage of tables, refer to the <u>Table</u> topic.
- **Extended Properties**: This tab displays the extended properties configured for the table. For more information on configuring extended properties, refer to the <u>Extending Table Properties</u> topic.
- **Table Properties**: On this tab, you can view the table properties. For more information on table properties, refer to the <u>Updating Table Properties</u> topic.
- **Columns**: This tab displays a list of columns in the table.
- Workflow Log: This tab displays the workflow log of the table. For more information on configuring workflows, refer to the <u>Using Workflow Manager</u> section.
- **Data Quality**: On this tab, you can preview and profile the data in the table. For more information on previewing and profiling data, refer to the <u>Previewing Data</u> topic.

- **Documents**: On this tab, you can view or add documents related to the table.
- Test Specifications: On this tab, you can view the test cases related to the table. For more information on test cases, refer to the <u>Creating Test Cases</u> topic.

### **Column Details**

To view column details, on the Mapping Summary page, click <Column\_ Name>.

The Column Details page appears. By default, the Impact Analysis tab opens. You can view direct, indirect, and other impacts of the column.

For more information on impact analysis, refer to the <u>Running Impact Ana-</u><u>lysis</u> topic.

	olumn Properties Ext	ended Properties Dat	a Lineage Impact Analysis	Workflow Log Valid Value	s Documents			
mn	mary - Direct Impact		Summary - Indirect I	mpact		Audit Information		
		<b>.</b>	-	0	Upstream Impac	† Audit	Information	
			199		Downstream Imp	Created By	Administrator	
	Direct Impact	Indirect Impact	Other Impacts					
s Sc	ource							
ŧ	Project Name	Mapping Name	Target Information				Business Rule	
			Column	Table	Environment	System		
1	A_Project	Erwin_Map	ID New	dbo.ADS_New_ASSOCIATIONS	Data_Migration	erwinDIS	ABS	
2	Erwin_Feb	Integration_Feb	RESOURCEID	dbo.RM_RESOURCE	Integration	Erwin_Sales		
3	Erwin_Project	Child_Map	ID New	dbo.ADS_New_ASSOCIATIONS	Data_Migration	erwinDIS		
s Ta	rget							
¥	Project Name	Mapping Name	Source Information				Business Rule	
			Column	Table	Environment	System		
				No Records Found				

You can click the following tabs to work on the Column Details page.

Data Lineage: This tab displays the forward and reverse lineage of the column. For more information on lineage of columns, refer to the <u>Column</u> topic. **Extended Properties**: This tab displays the extended properties configured for the column. For more information on configuring extended properties, refer to the <u>Extending Column Properties</u> topic.

- **Column Properties**: This tab displays the column properties. For more information on column properties, refer to the <u>Updating</u> <u>Column Properties topic</u>.
- Workflow Log: This tab displays the workflow log of the column.
   For more information on configuring workflows, refer to the <u>Using</u> Workflow Manager section.
- **Valid Values**: This tab displays the codesets assigned to the column as valid values. For more information on assigning codesets to columns, refer to the <u>Assigning Codesets to Columns</u> topic.
- **Documents**: This tab displays the uploaded documents related to the column.

# **Viewing Mapping Statistics**

You can view mapping statistics and view the following information about mapping specifications:

- Total rows
- Number of target tables
- Targets not mapped
- Sources not mapped
- Business rules
- Lookups

To view mapping statistics, follow these steps:

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

The Mapping Specification grid appears.

Workspace Mappings 🔹 👻		Mapping Specifico	ition Graph	nical Designer	Test Specification	Workflow Lo	g	•
Mappings	20	🛙 🔯 🔳 🍣 (Er	win_Map]		Profiles:	Default	- Ø	ò, 👫 🔊 < 🗵
Projects     Garrefour (9)     Garta Lake Migration (3)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>EDW (2)</li> <li>ERP (2)</li> <li>ERP (2)</li> <li>Erwin_Project (2)</li> </ul>	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	ID	bigint	8	ABS
Transformations	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	SOURCE_OBJECT_	bigint	8	ABS
Erwin_Map (v1.00) MappingTargets K_New_Mapping (v1.	3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI,	SOURCE_OBJECT_	bigint	8	ABS

3. click 🌣.

The mapping statistics are shown with hyperlinks.

### **Viewing Mapping Statistics**

Test Specification	Test Specification Workflow Log								
Profiles:	Default	🗖 🗴 🖉	<b>:</b>	< 🛛					
Source Column Name	Source Colum Data Type	Total Rows:	6	ule					
Nulle	Duid type	Target Tables:	1						
		Source Tables:	1						
ID	bigint	Targets Not Mapped:	<u>0</u>						
		Sources Not Mapped:	<u>0</u>						
SOURCE_OBJECT_	bigint	Business Rules:	1						
	0	Possible Truncations:	<u>0</u>						
		Look Ups:	<u>0</u>						

You can click the required hyperlinks to get the detailed information.

# **Associating Mappings**

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

- Code Mappings or Code Crosswalks
- Reference Tables
- Requirements

It involves:

- Associating code maps with data item mappings
- Associating reference tables with mappings
- Linking requirements with mappings

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

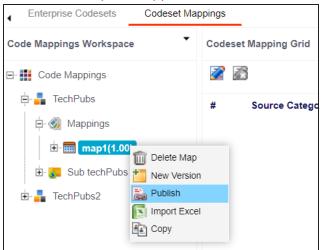
Before associating a code map with data item mappings, ensure that you publish the code map.

### **Publishing Code Maps**

To publish code maps, follow these steps:

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

The available options appear.



3. Click Publish.

The Publish Codeset Map page appears.

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

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

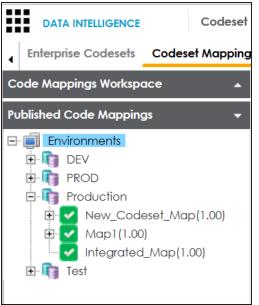
Field Name	Description							
Codeset Map	Specifies the name of the code map.							
Name	For example, Gender Crosswalk.							
Codeset Map	Specifies the new version of the code map.							
Version	For example, 1.02.							
Codecat Man	Specifies the description about the code map.							
Codeset Map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

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

5. Click 💾.

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

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



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

Workspace Mappings	Mapping Specifica	tion Graphic	al Designer	Test Specification	Workflow Log	
Project (4)	📝 🗐 🔯 🔳 🍣		Profiles:			
Transformations	# Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length
A 🌉 Mappings	1 SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5
Mapping Targets Drag Drop (v1.00)	2 SQLTechPubs	SQLTechPubs	dbo.Customers	CompanyName	nvarchar	40
SalesforceIntegration (v1.0) TechPubs (v1.00)	3 SQLTechPubs	SQLTechPubs	dbo.Customers	ContactName	nvarchar	30
<ul> <li>project 1 (4)</li> <li>Project Tech Pubs (8)</li> </ul>	4 SQLTechPubs	SQLTechPubs	dbo.Customers	ContactTitle	nvarchar	30
<ul> <li>Tech Pubs Online (6)</li> <li>TechPubs (6)</li> </ul>	5 SQLTechPubs	SQLTechPubs	dbo.Customers	Address	nvarchar	60

The Mapping Specification grid appears.

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

er 7	Fest Specification	Workflow Log			•		Metadata Catalog
tion]		Pro	files: Mapping_D	esigner_Profil 🔻	\$ 14 14 16 16 16 16 16 16 16 16 16 16 16 16 16		Metadata Combo (
t Table	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Scale Nullable Flag		
					✓ Target Table Alias □Target Column Class □Target Column Alias	^	Metadata
					Target Business Key Flag CSM Mapping Specification Artifacts		Systems
istomers	PostalCode	nvarchar	10	0	Reference Table Business Rule	Ŧ	Search
istomers	City	nvarchar	15	0	0	Γ	erwin DI Suite
							erwin DM

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.

8. Click 🔜.

The code map is associated with the data item mappings.

### **Associating Reference Tables with Mappings**

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

To associate reference tables with Mappings, follow these steps:

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

The Mapping Specification grid appears.

Workspace Mappings 🛛 👻	<b>ا</b>	Mapping Specific	ation Grap	hical Designer	Test Specification	Workflow Lo	g	1
Mappings	<u>i</u>		🛛 😂 [Integratio	n]	Profiles:	Default	- 🔅 🛛	, 👯 🗟 🖬 🐻 😣 < 🗵
Projects  ERP (3)  Frwin_Feb (1)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>Frwin_Project (5)</li> <li>Erwin_Sales (1)</li> <li>Transformations</li> </ul>	1	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEID	int	4	FLOOR
<ul> <li>Test Cases</li> <li>Mappings</li> <li>Integration</li> <li>MappingTargets</li> </ul>	2	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCENAME	varchar	100	REVERSE
	3	Erwin_Sales	Integration	dbo.RM_RESOURC	RESOURCEDESC	varchar	150	dbo.RM_Resource

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

•		Mapping Specifica	<b>tion</b> Graph	nical Designe	er Test Specificatio	n Workflow	Log
×.	📸 📄 🛃 🛛 APPEND 💷 🍣 [Integration]				Profiles:	Default	🔽 🗘 🐚
#		Source System Name	Source Environment Name	Source Tak Name	ble User Defined 47	Source Colum	n Source Column Length
	1	Erwin_Sales	Integration	dbo.RM_RE	User Defined-47 User Defined-48 User Defined-49 User Defined-50		4
	2	Erwin_Sales	Integration	dbo.RM_RE	Mapping Spec Row Co Row Order	omments •	100

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 refere	en	ce tables.
4 Mapping	g Specification	Graphical Desi	gner Test Spe	ecification W	/orkflow Log		, /	Metadata Catalogue 🔍 🤇
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	APPEND 017 😪	[Erwin_Map]	Profiles:	Default	▼ \$	ra 👯 🛛 🖬 👼 😣 < 🖸		Code Mappings Catalogue
`arget Column .ength	Created By	Created Date 2019-10-21 14:30	CSM Mapping 5:15.057	Last Modified By	Last Modified Date Time	Reference Table	1	Code Mappings    C_Name    EDW
	Administrator	2019-10-21 14:36:15.057	Integrated_Map(1	1.00) <sup>hinistrator</sup>	2019-12-10 14:49:07.187		^	GD Crosswalks      Government of the second se
	Administrator	2019-10-21 14:36:15.057		Administrator	2019-12-10 14:49:07.187			Map1(1.00)

7. Click 🐻.

The reference table is associated with the mappings.

# Linking Requirements to Mappings

To ensure enterprise-wide traceability, you can link your functional requirements to data mappings.

To link functional requirements to mappings, follow these steps:

- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. Click a mapping.

The mapping opens in the detailed view.

space Mappings 🔹 👻	· —	Mapping Specifico		hical Designer	Test Specification		-	•	Metadata Catalogue O
Mappings Realized formations	<u> </u>	APPEND OFF	🧟 [A_Map]		Profiles: Default	-	🏟 📝 🗟	) 🖬 📾 😣 < 🛛	Metadata     Matadata     Marty Flat Files
Projects A Project (1) Transformations	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	A_System     AdventureWorks     AdventureWorks     AdventsURE
<ul> <li>Test Cases</li> <li>Mappings</li> <li>Manapings</li> <li>Mapping (v1.00)</li> </ul>	1	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	int	4	<b>^</b>	<ul> <li>Atlas Sales System</li> <li>BI</li> <li>BO Reports</li> </ul>
AdventureWorks_Migration (8)     AdventureWorks_Migration (8)     APJ_Demo (1)     BBT (1)	2	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_PRO	int	4		Customer Order Entry     Jota Lake     Jota Models     JEDW
BFSI Integration (1) Carrefour (9) Data Lake Migration (3)	3	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	50		
EDW (2) ERP (2) Erwin_Project (2) Exeter (2)	4	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	4000		
<ul> <li>IQVIA (1)</li> <li>New_Project (1)</li> <li>OBIEE (23)</li> </ul>	5	A_System	A_Environment	dbo.CAT_DIALOG	CREATED_BY	varchar	50		I_New     Ieradata     IertCOMM
Sales Data Mart (8)	6	A_System	A_Environment	dbo.CAT_DIALOG	CREATED_DATE_TI	datetime	8		
	4							• •	Code Mappings Catalogue
•			I< <	Records from 1 to 9	> > C	Page 1 🚬 📄 1	100 rows per page	•	Specification Artifact Catalogue
ed Mappings 🔹	Additi	onal Mapping Infor	mation					^	Reference Table Catalogue

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

A list of header columns appears.

Linking Requirements to Mappings

Workspace Mappings 🔹 👻	•	Mapping Specifico	<b>tion</b> Gra	phical Designer	Test Specification	Workflow Lo	g
Mappings		APPEND OFF	😂 [A_Map]		Profiles: Default	•	Ô.
Projects	#	Source System Name	Source Environment	Source Table	Source Column	Source Column Data Type	Source Length
Transformations Test Cases Mappings Test Cases	1	A_System	A_Environment	<ul> <li>CSM Mapping</li> <li>Specification Artification</li> <li>Lookup Reference</li> <li>Lookup On</li> </ul>	Column	ht	4
<ul> <li>MappingTargets</li> <li>AdventureWorks_Migration (8)</li> <li>APJ_Demo (1)</li> <li>BBT (1)</li> </ul>	2	A_System		Trans Lookup Cor Source Column Pr Source Column Sc	ecision	nt	4
<ul> <li>BFSI Integration (1)</li> <li>Carrefour (9)</li> <li>Data Lake Migration (3)</li> </ul>	3	A_System	A_Environment	dbo.CAT_DIALO	G CAT_DIALOG_TAE	3 varchar	50

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

The specification Artifact column becomes visible on the Mapping Specification tab.

- 5. In the right pane, click **Specification Artifact Catalog**.
- 6. Expand the project that contains the required specification.
- 7. Drag and drop the specification on the **Specification Artifacts** column in the required row.

Manager						ê Sec	arch Q 🗘 🖉 🖪
∢ Map	ping Specification	Graphical	Designer Tesl	Specification Workflow Log		•	Metadata Catalogue 🔍 🔺
<u>i</u>		A_Wap]	Profi	les: Default	: 🐚 🔣 🖬	, 🐻 😣 < 🗵	Code Mappings Catalogue
et Column	Target Column	Created By	Created Date	Specification Artifacts	Last Modified By	Last Modified Date Time	Specification Artifact Catalogue 👻
Туре	Length					Date time	Specification Templates Catalogue EDW (0)
	4	Administrator	2019-10-16 15:44:32.383	<b>Sp_Name (v1.00</b>	Administrator	2019-10-17 11:56:07.883	<ul> <li>APJ (1)</li> <li>APJ (1)</li> <li>Aradaq PDLC (1)</li> <li>ARCBS (1)</li> </ul>
	4	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353	<ul> <li>P_Name (1)</li> <li>Specifications</li> <li>Sp_Name (v1.00)</li> </ul>
ar	50	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353	

8. Click 🐻.

Requirements are linked to the selected mapping.

# **Publishing and Creating Versions of Mappings**

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

It involves:

- Creating versions of maps
- Base-lining Projects
- Comparing two different mapping versions
- Publishing mappings
- Restoring archived maps as active

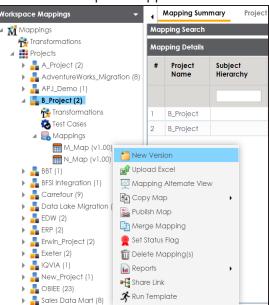
### **Creating Versions of Maps**

You can create new version of maps and track history of changes made in the mapping specification. You can also notify and send mail comments to all the project users about the creation of new version. For more information on notifying project users, refer to the Configuring Notifications topic.

To create versions of maps, follow these steps:

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

The available options appear.



3. Click New Version.

The New Version page appears.

#### **Creating Versions of Maps**

Mapping Name*     M_Map       Mapping Version     1.01       Mapping Description     *
Mopping Version 1.01
Mapping Description
Version Label
Changed Description*
Mail Comments

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

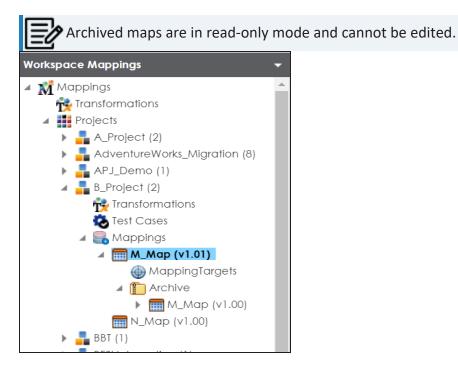
Field Name	Description							
Mapping	Specifies the mapping specification name.							
Name	For example, EDW_PROD_IDS_Benefits_Detail.							
Mapping	Specifies the new version of the mapping specification.							
Version	For example, 1.02.							
Mapping	Specifies the description about the mapping.							
Description	For example: This is a map between EDW source and IDS target systems.							
	Specifies the version label of the mapping specification.							
Version	For example, Beta.							
Label	For more information on configuring version display of mapping spe-							
	cifications, refer to the Configuring Version Display topic.							
Changed	Specifies the description of the changes made in the mapping spe-							
Description	cification.							
	For example: A business rule for a source column was added.							
Mail Com-	Specifies the mail comments, which can be sent to the project users							
ments	through an email notification.							
	For example: Target update strategy is not updated.							

#### **Creating Versions of Maps**

Field Name	Description
	For more information on configuring notifications, refer to the Con-
	figuring Notifications topic.

# 5. Click

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



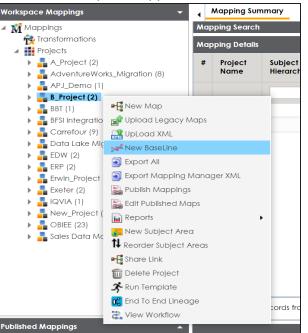
### **Base-lining Projects**

Base-lining a project brings all maps in the project to the same version. You can base-line all the maps in a project and record change description and notify all the project users and send mail comments to them.

To base-line projects, follow these steps:

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

The available options appear.



3. Click New Baseline.

The New Baseline page appears.

#### **Base-lining Projects**

🗖 New Baseline						_ 🗆 ×
						≝ ×
Version Label						
Change Description*	<u>م</u> ت	<u>H</u> B	ΙÜ	EE	<b>i</b> ≣ t≣ t≣	*
						<b></b>
						-
Mail Comments						

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

For example:

Version Label - Beta.

For more information on version display, refer to the <u>Configuring Version Display</u> topic.

- **Change Description** Business rule for all the source column was changed to ASCII.
- Mail Comments The target update strategy needs to be updated.

For more information on notifying project users, refer to the <u>Configuring Noti-</u><u>fications</u> topic.

5. Click 💾.

The project is base-lined and all the maps in the project now have the same version. Project users receive email notifications about the base-lining and mail comments, if you enable notifications for it. For more information on configuring notifications, refer to the <u>Configuring Notifications</u> topic.

## **Comparing Two Different Mapping Versions**

You can use the advanced mapping comparison ability to quickly and efficiently compare any

two mapping versions. You can view the changes on a row by row basis and improve your debugging ability.

To compare two different mapping versions, follow these steps:

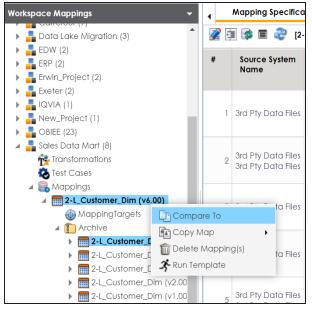
- 1. Go to Application Menu > Data Catalog > Mapping Manager.
- 2. In the Workspace Mappings pane, select two mapping versions.



• Use shift keys to select the two mapping versions.

3. Right-click the selection.

The available options appear.



4. Click Compare To.

The Compare To page appears. All the changes are highlighted in red color in the comparison report.

### **Comparing Two Different Mapping Versions**

										Exclude Comm	on Rows Export:   🔊 🐔
Development Te	am.										
-	2-L_Customer_Dim (V6.00										
Map2 Name:	2-L_Customer_Dim (V5.00	/VLv4x)									
							S	irce Details			
	System	Environment	Table	Column	Data Type	Length	Precision		Definition	Comments	Logical Column Name
Version 5.00	3rd Ptv Data Files	2 and Ptv Data Files	Customers	CustNumber	Varchar(10)	Length 10.0	Precision		Customr Number	Comments	Logical Column Name
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0			Custom Number		
	Jid Ply Data Thes	Jul Ply Data Lites	Customers	Castryumoer	varenar(10)	10.0			Casicili Pallibe		
							Sou	rce Details			
iercion	System	Environment	Table	Column	Data Type	Length	Precision	Scale	Definition	Comments	Logical Column Name
.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0			Customr Number		
.00	3rd Pty Data Files	3rd Pty Data Files	Customers	CustNumber	Varchar(10)	10.0			Customr Numb <del>e</del> r		
							Sou	arce Details			
ertion	System	Environment	Table	Column	Data Type	Length	Precision	Scale	Definition	Comments	Logical Column Name
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchat(25)	25.0			First Name		
5.00	3rd Pty Data Files	3rd Pty Data Files	Customers	FirstName	Varchar(25)	25.0			First Name		
							C	rce Details			
ersion	System	Environment	Table	Column	Data Type	Length	Precision		Definition	Comments	Logical Column Name
5.00 5.00	3rd Pty Data Files 3rd Pty Data Files	3rd Pty Data Files 3rd Pty Data Files	Customers	FirstName FirstName	Varchar(25) Varchar(25)	25.0 25.0			First Name First Name		
.00	Std Pty Data Plats	Job Pty Data Plies	Customers	rintrame	varenar(25)	23.0			rint same		
							Sou	arce Details			
		Environment	Table	Column	Data Type	Length	Precision	Scale	Definition	Comments	Logical Column Name
Vertion.	System	Lavironment									

To exclude exporting common rows in the report, select **Exclude Common Rows Export**.

Use the following options to export the comparison report:

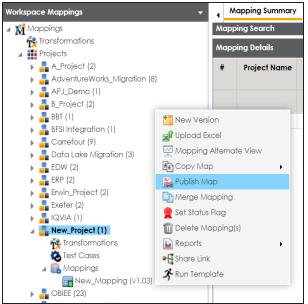
- To export the report in the PDF format, click 1/10.
- To export the report in the XLSX format, click
- To export the report in the HTML format, click

You can publish a map on an effective date and enter publishing notes for a record. Before publishing mappings, ensure that the source and the target environments have their corresponding production environments.

### **Publishing Mappings**

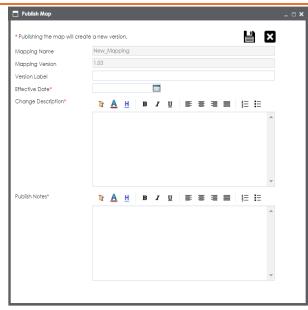
To publish mappings, follow these steps:

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



3. Click Publish Map.

The Publish Map page appears.



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

Field Name	Description						
Managina	Specifies the mapping specification name.						
Mapping Name	For example, EDW_PROD_IDS_Benefits_Detail.						
Nume	It is autopopulated and you cannot edit this field.						
	Specifies the version of the mapping specification.						
Manning	For example, 1.00.						
Mapping Version	It is autopopulated.						
Version	For more information on configuring version display of maps, refer to						
	the <u>Configuring Version Display</u> topic.						
	Specifies the version label of the mapping specification.						
Version	For example, EDW_PROD_IDS_Benefits_Detail (Alpha).						
Label	For more information on configuring version display of maps, refer to						
	the <u>Configuring Version Display</u> topic.						
Effective	Use 🥅 to enter the effective date of publishing.						
Date	For example, 04/02/2020.						

Field Name	Description
Change	Specifies the description for changes made in the mapping specification.
Change Description	For example: Business rule was modified from ABORT to ASCII for the
Description	source column ID.
Publish	Specifies the publish notes about the mapping specification.
	For example: The mapping specification is approved for publishing on 1 Feb 2020.

## 5. Click

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

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

To view published map details, in the **Published Mappings** pane, click the <Mapping\_ Name>.

The business view of the mapping appears which can be used to run impact analysis, lineage analysis, and data quality etc. For more information on business view, refer to the <u>Opening Business View</u> topic.

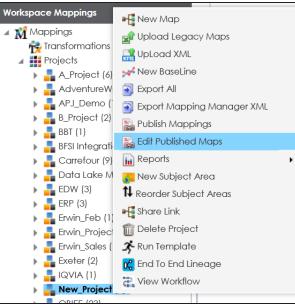
orkspace Mappings 🔹 🔺	Мар	ping De	tails								<b>B</b> < -			
blished Mappings 🔹 👻	Spec	ificatio	n Name	New_Mappin	g		Map Id		219					
Projects	Versi	on		1.03			Version	Label						
A_Project	Мар	ping De	escription											
AdventureWorks_Migration  BFSI Integration  EDW  EDW  Envin_Project	Targe	et Table	S	dbo.ADS_ASS dbo.ADS_FOR dbo.ADS_KEY dbo.ADS_KEY	304		Source	Tables	dbo.ADS_ASSOCIATIONS dbo.ADS_FORM dbo.ADS_KEY_VALUE dbo.ADS_KEY_VALUE_OBJE	<u>C15</u>				
A New_Project	SQL	Query					SQL QU	ery Description						
🔺 🌉 Mappings	Targe	et Upda	te Strategy				Map Sp	ec Docs	View					
New_Mapping(v1.03)	_	10 I.W						Les P	10					
History	Mapping Specification													
					Target De	tails								
	#	Info	System	Environment	Table	Column	Data Type (L/P/S)	Business Rule	Extende	d Business Rule	System			
	1	=	New_System	New_Environn	dbo.ADS KEY VA	OBJECT PARENT TYPE	varchar(500,0,0)	UPPER			New_Syst			
	2					OBJECT_PARENT_COL					New_Syst			
	3	_	New_System	New_Environn	dbo.ADS KEY VA	MODULE KEY	varchar(255,0,0)				New_Sys			
			New_System	New_Environn	dbo.ADS_KEY_VA	OBJECT_TITLE	varchar(255,0,0)				New_Sys			
	4	-												
	4 5	ш		New_Environn	dbo.ADS KEY VA	OBJECT TYPE ID	bigint(8,19,0)				New_Sys			
	4 5 6		New_System		dbo.ADS_KEY_VA		bigint(8,19,0) varchar(500,0,0)							
	4 5 6 7		New_System New_System	New_Environn	dbo.ADS_KEY_VA		varchar(500,0,0)				New_Sys New_Sys			

### **Updating Publishing Details**

To update publishing details of published maps, follow these steps:

1. In the Workspace Mappings pane, right-click the required project.

The available options appear.



### 2. Click Edit Published Maps.

The Edit Publish Mappings page appears. You can use **Filter by Effective Date** to filter the mappings based on the effective publishing date.

Edit Publish Mappings															×
							Filte	r By Eff	ective Date	•	02/07/2	0 12:36:00	PM	•	•
Publish Tree <	Mapping Effective	Date													
<ul> <li>✓ III Projects</li> <li>✓ III New_Project</li> </ul>													Ľ	×	
✓ 🔄 🖶 Mappings	Publish Notes*	1	<u>A</u>	H	в	I	U	≣	≣ ≣		ŧ≡	<b>i</b> ∃ *≡	*≣	*	
														<	
	Effective Date*														

3. In the **Publish Tree** pane, select the required published map.

Now, you can update Publish Notes and Effective Date.

4. Click 💾.

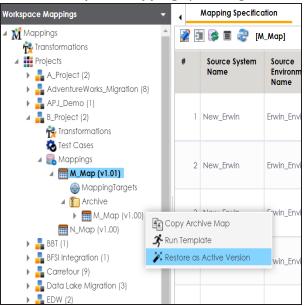
The publishing details of the map is updated.

# **Restoring Archived Maps As Active**

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

To restore archived maps as active, follow these steps:

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



The Restoring Archived Mapping as Active page appears.

#### **Restoring Archived Maps As Active**

Restoring Archived Mapping	) as Active	_ 🗆 🗙
		<b>^</b>
Mapping Name*	M_Map	
Mapping Version	1.02	
Mapping Description	^	- 1
	*	- 1
Version Label		- 1
Changed Description*		- 1
		- 1
Mail Comments		-

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

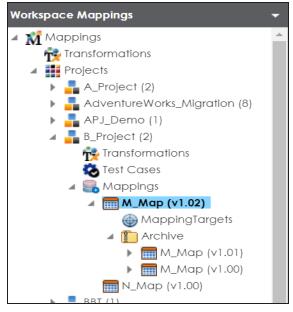
Field Name	Description
Mapping	Specifies the mapping specification name.
Name	For example, EDW_PROD_IDS_Benefits_Detail.
Mapping	Specifies the new version of the mapping specification.
Version	For example, 1.02.
Mapping	Specifies the description of the mapping.
Description	For example: This is a map between EDW source and IDS target systems.
	Specifies the version label of the mapping specification.
Version	For example, Beta.
Label	For more information on configuring version display of mapping spe-
	cifications, refer to the Configuring Version Display topic.
Changed	Specifies the description of the changes made in the mapping spe-
Description	cification.
Description	For example: A business rule for a source column was added.
Mail Com-	Specifies the mail comments which can be sent to the project users

**Restoring Archived Maps As Active** 

Field Name	Description							
	through an email notification.							
	For example: Target update strategy is not updated.							
	For more information on configuring notifications, refer to the <u>Con</u> -							
	figuring Notifications topic.							

# 4. Click

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



# **Exporting Mapping Specifications**

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

You can export mapping specifications to:

- the proprietary XML format
- generate ETL jobs

### **Proprietary XML Format**

Once the mappings are approved for coding, you can export the mappings as coding requirements in the XML format.

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

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

The Mapping Specification grid appears.

Workspace Mappings 🔹 👻	•	Mapping Specification         Graphical Designer         Test Specification         Workflow Log							
Mappings	2	I 😵 II 💸 (E	win_Map]				Profiles:	Default 🔽 🔯 [	à ี a < 🛛
Projects  RRP (2)  Revin_Project (2)	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	Extended Business Transformation
Transformations	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	/ ID	bigint	8	ABS	
<ul> <li>Erwin_Map (v1.03)</li> <li>MappingTargets</li> <li>Archive</li> </ul>	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	_ bigint	8	ABS	
Exeter (2) IQVIA (1)	3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT	_ bigint	8	ABS	

3. Click 👯.

The Export Window page appears.

#### **Proprietary XML Format**

Export Window										
ETL Integration Library: To extend the library, contact support - 🔀										
A Mapping Manage	r Testing Automati	on ETL Engineering	Data Vault 2.0							
Nasdaq Data Asset Form										
	Type : CAT									
		Administrator [12/18/2018 04:04:16] Administrator [12/18/2018 04:29:15]								
Mapping Manager XML	Mapping Manager XML Mapping Manager XML Type : CAT									
<element></element>		AnalytiX Data Services [09/14/ AnalytiX Data Services [09/14/	-							

4. Select Mapping Manager XML and click

DefauttDialog		_ 🗆 X
		🗸 🗙
DefaultTab		
	No Cat Options Found	
1		
Click 🗹.		

6. Select the required mappings and click 1.

The following notification appears.

5.

### **Proprietary XML Format**

			Search	Q 🗘 🛛 🛛
Profiles:	Default	Name: Rows 10 South Rows South Sou	Download File	Catalogue     C       xdata     A       rd Party Flat Files     A
Column	Business Rule		Extended Business Transformation	A_System     AdventureWorks     AdventureE
	ABS			<ul> <li>Atlas Sales System</li> <li>BI</li> <li>BO Reports</li> </ul>
				Customer Order Entry

7. Click the **Download file** hyperlink.

A ZIP file is downloaded. Unzip this file to use the mapping specification in the XML format.

### **ETL Jobs**

Once the mappings are considered 'approved for coding', you can export the mappings as coding requirements to automatically generate ETL/ELT jobs. The ETL jobs can be generated for tools, such as Informatica PowerCenter, IBM DataStage, Microsoft SQL Server SSIS, and Talend.

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

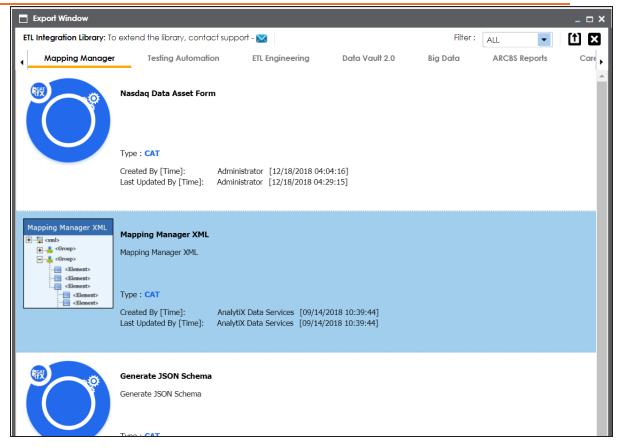
#### The Mapping Specification grid appears.

Workspace Mappings 🛛 👻	_ ۱	Mapping Specifico	ation Grap	hical Designer	Test Specification	Workflow Lo	g	,
Mappings Transformations	2	🗐 🐼 🔳 🍣 (E	rwin_Map]		Profile	es: Default	Ţ Ţ	G, 👯 🗐 < 🗵
<ul> <li>Projects</li> <li>Data Lake Migration (3)</li> <li>EDW (2)</li> </ul>	#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
<ul> <li>ERP (2)</li> <li>Erwin_Project (2)</li> <li>Transformations</li> </ul>	1	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	D	bigint	8	ABS
<ul> <li>Test Cases</li> <li>Mappings</li> <li>m Erwin_Map (v1.00)</li> <li>m K_New_Mapping (v1.00)</li> </ul>	2	erwinDIS	erwinDIS	dbo.ADS_ASSOCI.	SOURCE_OBJECT_	, bigint	8	ABS
<ul> <li>Exeter (2)</li> <li>IQVIA (1)</li> </ul>	3	erwinDIS	erwinDIS	dbo.ADS_ASSOCI	SOURCE_OBJECT_	bigint	8	ABS

3. Click **K**.

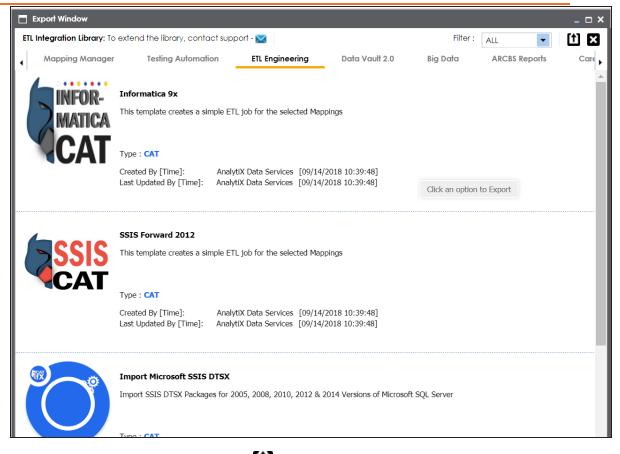
The Export Window page appears.

#### **ETL Jobs**



4. Click the ETL Engineering tab.

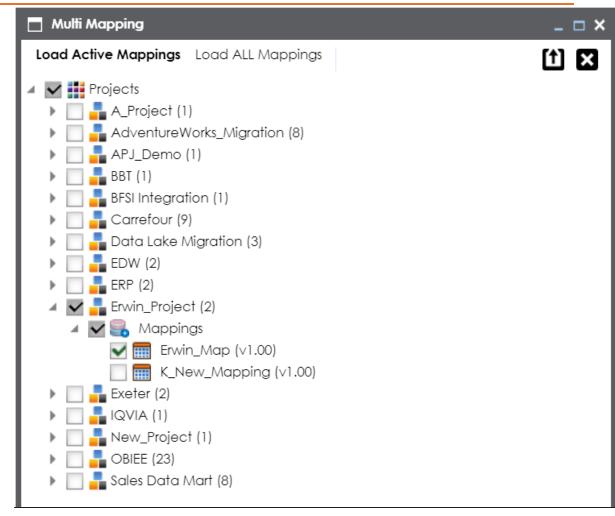
#### **ETL Jobs**



5. Select the required ETL tool and click 🛍.

The Multi Mapping page appears.

**ETL Jobs** 



6. Select the mapping and click 🛍.

The following notification appears.

#### **ETL Jobs**

\4/			Learch	Task Done			
Workflow Lo	Profiles	INFOR- MATICA CAT	Download File	×	, 1 < 1	Metad	Metadato
Source Column Data Type	Source Colui Length			Tra	nded Busine nsformation	) 	A_Syst
bigint	8	AB	S		<b>^</b>	) 	Atlas S

7. Click the **Download File** hyperlink.

The mapping specification is exported.

# **Creating and Managing Test Cases for Mappings**

You can create test cases for testing data mappings and ETL processes in the Mapping Manager for:

- Projects
- Mappings

The test cases created at project-level apply to all the mappings created under the project. Whereas, map-level test cases apply to particular map.

Creating and managing test cases involves:

- Creating test cases
- Adding validation steps
- Adding documents
- Managing test cases

# **Creating Test Cases**

In the Mapping Manager, you can define test cases at:

- Project-level
- Map-level

At the project-level, you can create multiple test cases. Whereas, at the map-level, you can create a single test case.

# **Creating Project-Level Test Cases**

To create project-level test cases, follow these steps.

- 1. Go to Application Menu > Data Catalog > Mapping Manager > Workspace Mappings.
- 2. Expand a project and click the **Test Case** node.

The Test Case Summary page appears.

Workspace Mappings 🛛 👻	Test Co	ase Summary				
Mappings	€	⊕ ا				
Projects	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Des
A_Project (1)						
AdventureWorks_Migration (8)						
APJ_Demo (1)						
🔺 📮 Erwin_Project (2)						
💏 Transformations						
🐼 Test Cases						
🖌 🌉 Mappings						
Erwin_Map (∨1.00)						
K_New_Mapping (v1.00)						

3. Click •.

The Add New Test Case page appears.



Test cases created for a project are also applicable to the mappings under a project.

**Creating Test Cases** 

Add New Test Case		- <b>-</b> ×
Test Case Overview	w Validation Steps Document Upload	•
	Save & Continue Save & Exit Cancel	
Test Case Name*		- 11
Test Case Label		- 11
Type of Testing	Select	- 11
Test SQL Script	ъ <u>А</u> <u>н</u> в <i>z</i> <u>и</u> ≡ ≡ ≡ ≡   ⊟ ⊟ ≒ = <b>≼</b> <i>≼</i>	
	*	- 1
		- 1
	*	
Description	≹ A H B Z U ≡ ≡ ≡ ≡  = != != '= '= <b>≼</b>	
	*	
Expected Result	аАн виш вава в ЕЕЕЕ	
		-

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

Field Name	Description
Test Case	Specifies the name of the test case.
Name	For example, Verifying the Completeness of Source Metadata.
Test Case	Specifies the unique label for the test case.
Label	For example, Source Metadata.
Type of Test-	Specifies the type of testing.
ing	For example, Metadata Testing.
Test SQL	Specifies the SQL script required in the test execution.
Script	For example, select * from dbo.ADS_ASSOCIATIONS.
	Specifies the test objective in brief.
Description	For example: The objective of the test case is to verify the com-
	pleteness of source metadata.
Expected Res-	Specifies the expected result of the test case in detail.
ult	For example: The source table should have 50 columns.
Actual Result	Specifies the actual test result after the execution of the test.

**Creating Test Cases** 

Field Name	Description
	For example: The source table has 39 columns.
Testing Com-	Specifies the testing comments about the test case.
ments	For example: The source metadata was scanned from a Sql Server data-
mento	base.

5. Click Save and Exit.

The test case is created and added to the **Test Cases** node.

# **Creating Map-Level Test Cases**

To create map-level test cases, follow these steps.

- 1. Go to Application Menu > Data Catalog > Mapping Manager > Workspace Mappings.
- 2. Click a mapping and click the **Test Specification** tab.

It displays the existing project-level test cases.

Workspace Mappings 🔹 👻	4	Mapping Specifi	cation Grap	ohical Designer	Test Specificat	ion Work	flow Log			•	Metadata 🔍 👻
Mappings	€	• • •							۵ پ	× 14	Metadatc ^
A Projects	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approved	Мар	
A_Project (2)											▶ ∎Adven
AdventureWorks_Migration (											AMER:
<ul> <li>APJ_Demo (1)</li> <li>B_Project (2)</li> </ul>		9	T Name								Atlas S
<ul> <li>BET (1)</li> </ul>	-	7	1_Name								BO Rep
BFSI Integration (1)											Custor
Ecarrefour (9)											🕨 🗐 Data L
🕨 🔒 Data Lake Migration (3)											🕨 🗐 Data N
EDW (2)	•									÷	▶ ∎EDW
ERP (2)			< <	Records from 1 to		🕐 Page 1	25 rov	ws per page			▶ ∎erwinD
A 🔓 Erwin_Project (2)						•		•			JDEdw     Mew_E
🙀 Transformations	4	Test Case Overv	iew Valida	ation Steps	Document Uplo	ad Ext	ended Prop	erties		,	
A Streams											People
Erwin_Map (v1.04)											▶ ∎Salesfc
MappingTargets											▶ ∎SAP 🖕
Archive	Tes	t Case Id	9		Extern	al Test Case Id					$\leftarrow$
K_New_Mapping (v1.											On de Manada
Exeter (2)	Tes	t Case Name*	T_Name								Code Mappin( 🔺
→ 📲 IQVIA (1) 👻	Tes	t Case Label									Specification / 🔺
Published Mappings					_					-	Reference Tab 🔺

3. Click •.

The Add New Test Case page appears.

**Creating Test Cases** 

Add New Test Case																_ = :
Test Case Overview		V	alidat	ion Ste	ps		Docu	ment	Uploc	ıd						
								Sa	ve & Co	ontinu	e	ave &	Exit	Car	ncel	,
Test Case Name*																
Test Case Label								Р	riority		Seleo	st			-	
Type of Testing	Sele	st				•	-	E	xtend	able						_
Test SQL Script	1	A	H	в	1	U	≣	≣	≡			I≡	*≣	•≣	*	
															~	
Description	đ	<u>A</u>	H	в	1	U	E	≣	3	=	t≡	I	*≣	*≣	* ^	
															~	
Expected Result	िंद	<u>A</u>	H	В	I	Ū	F	≣	=		ţ≡	I	*≣	⁺≣	*	
															~	

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

Field Name	Description							
Test Case	Specifies the name of the test case.							
Name	For example, Verifying the Completeness of Source Metadata.							
Test Case	Specifies the unique label for the test case.							
Label	For example, Source Metadata.							
	Specifies the priority of the test case.							
Priority	For example, High. Priority for business rules and functional test cases							
	can be medium or higher.							
Type of Test-	Specifies the type of testing.							
ing	For example, Metadata Testing.							
	Specifies whether the test case is visible even when this map is							
Extendable	archived.							
	A map is archived whenever you create a new version of the map.							
Test SQL	Specifies the SQL script required in the test execution.							
Script	For example, select * from dbo.ADS_ASSOCIATIONS.							

**Creating Test Cases** 

Field Name	Description							
	Specifies the test objective in brief.							
Description	or example: The objective of the test case is to verify the com-							
	pleteness of source metadata.							
Expected Res-	Specifies the expected result of the test case in detail.							
ult	For example: The source table should have 50 columns.							
Actual Result	pecifies the actual test result after the execution of the test.							
Actual Result	For example: The source table has 39 columns.							
Testing Com-	Specifies the testing comments about the test case.							
ments	For example: The source metadata was scanned from a Sql Server data-							
	base.							
Test Case	Specifies the status of the test case.							
Status	For example, Passed.							
Approved	Specifies whether the test case is approved.							

#### 5. Click Save and Exit.

The test case is added under the Test Specification tab.

Once a test case is created, you can enrich it by:

- Adding validation steps
- Adding documents

Managing test cases involves:

- Updating test case status
- Approving test cases
- Exporting test cases
- Deleting test cases

You can add multiple validation steps to the test cases at:

- Project-level
- Map-level

You can also specify actual and expected results for each validation step.

## Adding Validation Steps to Project-Level Test Cases

To add validations to project-level test cases, follow these steps.

1. In the **Workspace Mappings** pane, expand a project and click the **Test Case** node. The Test Case Summary pane appears.

Workspace Mappings 🔹 🔻	Test Ca	se Summary					^				
Mappings	•	Ð ⊕					🕷 🗙				
Projects	#	#         Test Case Id         Test Case Name         Test Case Label         Type of Testing         Description         Cl									
<ul> <li>A_Project (2)</li> <li>AdventureWorks_Migration (</li> </ul>											
🕨 🚦 APJ_Demo (1)	1	9	T_Name				Administrator				
<ul> <li>B_Project (2)</li> <li>BBT (1)</li> </ul>											
BFSI Integration (1)							•				
<ul> <li>Carrefour (9)</li> <li>Data Lake Migration (3)</li> </ul>	4		IX X Records fro	mitoi s si ∩	Page 1 25 rows pe	r page	•				
EDW (2)					• =	•					
<ul> <li>ERP (2)</li> <li>Erwin_Project (2)</li> </ul>	, • 💻	est Case Overview	Validation Steps Do	cument Upload			•				
Transformations					Save	ł					
🖌 🔩 Mappings	Test C	ase Id	9								
Erwin_Map (v1.04)	Test C	ase Label									
Exeter (2)	Test C	ase Name*	I_Name								
+	4						• •				
Published Mappings											

2. Click 🕑.

The Add Validation Steps page appears.

Add Validation steps															- 0	×
											Sa	ve	Canc	el		Î
Validation Step Type	Selec	st												•		H
Step Name*																
Description	T	<u>A</u>	H	в	I	U	≣	≣	≣	ŧ≡	i=	*≣	•≣			H
														-		I
														-		H
Expected Result	1	<u>A</u>	H	в	I	U	≣	≣	≣	ŧ≡	I≡	*≣	•≣			
														-		Ľ
																I
														~		H
Actual Result	<b>a</b>	<u>A</u>	H	в	I	U	≣	≣	≣	<b>4</b> ⊒	I≡	*≣	•≣			н
														-		
														-		-

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

Field Name	Description						
Validation Step	Specifies the type of validation step.						
Туре	For example, Data Check.						
Step Name	Specifies the unique name of the step.						
Step Name	For example, Validating Number of Columns.						
	Specifies the description of the validation step.						
Description	or example: This step validates the number of columns in the						
	source metadata.						
	Specifies the expected result in detail.						
Expected Result	For example: The source table, dbo.ADS_ASSOCIATIONS should						
	have 50 columns.						
Actual Result	Specifies the actual test result after the execution of the test.						
Actual Result	For example: The source table contains 50 columns.						
Test Step Com-	Specifies the comments about the step.						
ments	For example: The source metadata was scanned from a Sql Server						

Field Name	Description
	database.

4. Click Save.

The validation step is added to the test case.

## Adding Validation Steps to Map-Level Test Cases

To add validations to map-level test cases, follow these steps.

- 1. In the Workspace Mappings pane, expand a project and click a mapping.
- 2. Click the Test Specification tab.
- 3. Double-click a map-level test case.

The Test Case Summary	pane	appears.
-----------------------	------	----------

Workspace Mappings 🔹 👻	4	Mapping Spe	cification	Graphical Desi	gner Tes	Specification	Wo	rkflow Log		•	Metadata Catalogue 🔍 🔍	•
Mappings	€	• • •							🌣 🥑 🖏	×	Metadata     Matadata     Matadata     Matadata	*
<ul> <li>Projects</li> <li>A_Project (2)</li> <li>AdventureWorks_Migration (</li> </ul>	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approved	Mat	A_System     AdventureWorks     AdventureWorks     AMERISURE	
<ul> <li>APJ_Demo (1)</li> <li>B_Project (2)</li> <li>BBT (1)</li> </ul>		9	T_Name								Atlas Sales System     Atlas BI     BI     BO Reports	
BFSI Integration (1)     Garrefour (9)     Data Lake Migration (3)	2		Erwin_Test New_Association	Association	Source to Tar	ge Data Migrat				•	Customer Order Entry     Data Lake     Data Models	
<ul> <li>EDW (2)</li> <li>ERP (2)</li> </ul>	•	K K Records from 1 to 3 >>  Page 1 25 rows per page								•	<ul> <li>EDW</li> <li>erwinDIS</li> </ul>	
<ul> <li>Erwin_Project (2)</li> <li>Transformations</li> <li>Test Cases</li> </ul>	•	Test Case Ov	erview V	alidation Steps	Doc	ument Upload	E	xtended Propert		•	JDEdwards     Mew_Erwin     JODS	
<ul> <li>Gappings</li> <li>Erwin_Map (v1.04)</li> <li>MappingTargets</li> </ul>	Te	st Case Id	11			External T	est Case I	d	Ø		<ul> <li>Image: PeopleSoft</li> <li>Image: Salesforce</li> <li>Image: SAP</li> </ul>	
K_New_Mapping (v1.      Exeter (2)		st Case Name*	Erwin_Test			External					Code Mappings Catalogue	<b>•</b>
▶ ■ IQVIA (1) ▼	Te	st Case Label				Priority					Specification Artifact Catalogue	•
Published Mappings	Тур	pe of Testing				Extendab	le 🗌				Reference Table Catalogue	•

 In the bottom pane, click the Validation Steps tab. The Validation Steps tab appears.

Workspace Mappings 🗸 👻	4	Mapping Spe	cification	Graphical Des	igner Test	Specification	Wo	rkflow Log		•	Metadata Catalogue 🔍 🗸
Mappings	€	• • •							🌣 🥑 🖏	×	Metadata     Srd Party Flat Files
Projects     Project (2)	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approved	Μαρ	<ul> <li>A_System</li> <li>AdventureWorks</li> </ul>
AdventureWorks_Migration ( APJ_Demo (1)											AMERISURE     Atlas Sales System
<ul> <li>B_Project (2)</li> </ul>	1	9	T_Name								<ul> <li>Alids sales system</li> <li>Bl</li> </ul>
<ul> <li>BBT (1)</li> <li>BFSI Integration (1)</li> </ul>	2	11	Erwin_Test								BO Reports     Gustomer Order Entry
Carrefour (9)	3	12	New_Associatio	or Association	Source to Targ	e Data Migrat					🕨 🗐 Data Lake
<ul> <li>Data Lake Migration (3)</li> <li>EDW (2)</li> </ul>	4									•	Data Models     EDW
ERP (2)			K K Re	cords from 1 to	3 > >	🜔 Page 1	• 🗏 <sup>2</sup>	5 rows per pag			▶ ∎erwinDIS
Erwin_Project (2) Transformations		Test Case Ov	erview	Validation Steps	Docu	ument Upload	E	xtended Prope	rties	,	JDEdwards     Interview
Test Cases	Ð	)									) ODS
Mappings Erwin_Map (v1.04)	#	Step Name	Step Type	Step Status	Description	Expected Res	ult A	ctual Result	Created By	Creat	PeopleSoft     Salesforce
MappingTargets     Archive											▶ ■SAP ▶ ■T_New
K_New_Mapping (v1.											
<ul> <li>Exeter (2)</li> <li>IQVIA (1)</li> </ul>											Code Mappings Catalogue
										-	Specification Artifact Catalogue
Published Mappings	1									+	Reference Table Catalogue

5. Click •

The Add New Step page appears.

Add New Test Step																_ 0	×
													Save	C	ancel		-
Step Name*																	
Validation Step Type	Selec	<b>:</b> †				-	Ste	p Sta	tus		Sele	ect			-		
Description	T	A	н	в	1	<u>u</u>	≡	≡	=	=	١Ξ	I	•≡	•≡	*		
															-		
															-		
Expected Result	T	<u>A</u>	H	в	1	<u>u</u>	≡	≣	≡			I	*≣	•≣	*		
															-		
															-		
Actual Result	<b>a</b> r	A	н	в	1	U	≡	≣	≡		ŧ≡	:≡	*≣	•≣	*		
															-		
															-		
Test Step Comments	<u>a</u>	A	н	в	1	ш	=	≡	=	=	ŧ≡	:≡	•≡	•≡	*		
															-		
																	-

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

Field Name	Description
Step Name	Specifies the unique name of the step.

Field Name	Description
	For example, Validating Number of Columns.
Validation Step	Specifies the type of the validation step.
Туре	For example, Data Check.
Stop Status	Specifies the status of the step.
Step Status	For example, Passed.
	Specifies the description about the validation step.
Description	For example: This step validates the number of columns in the source
	metadata.
Expected Res-	Specifies the expected result in detail.
ult	For example: The source table, dbo.ADS_ASSOCIATIONS should have
	50 columns.
Actual Result	Specifies the actual test result after the execution of the test.
Actual Result	For example: The source table contains 50 columns.
Expected Res-	Enter the expected result in detail, including the error-message that
ult	is displayed on screen.
Tost Stop Com-	Specifies the comments about the step.
Test Step Com- ments	For example: The source metadata was scanned from a Sql Server
	database.

#### 7. Click Save.

The validation step is added to the test case.

## **Adding Documents**

You can add supporting documents such as text files, audio files, video files, and so on to a test case at:

- Project-level
- Map-level

## **Adding Documents to Project-Level Test Cases**

To add documents to project-level test cases, follow these steps.

1. In the Workspace Mappings pane, click the Test Cases node of a project.

The Test Case Summary pane appears.

Workspace Mappings 🔹 👻	Test Co	ise Summary						^
▲ Mappings ▲	€	⊕ ⊕					*	×
Projects	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Created By	
A_Project (2)								-
AdventureWorks_Migration (								
APJ_Demo (1)	1	9	T_Name				Administrator	· •
B_Project (2)								
BBT (1)								18
BFSI Integration (1)	4				_			· ·
Carrefour (9)					Dens 1 Defermine			·
Data Lake Migration (3)			I K K Records fro	miltoi 🔉 🕅 📋	Page 1 25 rows pe	r page		
EDW (2)								
ERP (2)	4	lest Case Overview	Validation Steps Do	cument Upload				•
Enwin_Project (2)								
Transformations					Save	el		
🔺 🕞 Mappings	Test C	ase Id	)			7		
Erwin_Map (v1.04)						-		
K_New_Mapping (v1.	Test C	ase Label						
Exeter (2)	Test C	ase Name*	Name					
	4	L				-		T I
Published Mappings								

2. In the bottom pane, click **Document Upload** and click  $oldsymbol{\Theta}$ .

The Add Test Case Document page appears.

#### **Adding Documents**

Add Test Case Document		_ <b>-</b> ×
		Save Cancel
Document Name*	Document Owner	
Document Object	Drag-n-Drop files here or click to select files for upload.	
Intended Use Description	<b>⋩ <u>म</u> в и ш ≡ ≡ ≡ ≡ ⊑ ⊑ ⊑ ± .</b>	4
		<b>v</b>
Approval Required Flag		

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

Field Name	Description						
Document Name	Specifies the name of the added document to the test case.						
	For example, Source Metadata Details.						
Document Object	Drag and drop document files or use ≐ to select and upload doc-						
bocament object	uments.						
Document Owner	Specifies the document owner's name.						
Document Owner	For example, John Doe.						
	Specifies the URL of the document.						
Document Link	For example, https://drive.google.com/file/I/2sC2_SZIyeFKI7OOn-						
	b5YkMBq4ptA7jhg5/view						
Intended Use	Specifies the intended use of the document.						
Description	For example: The document has information about the source						
Description	metadata.						
Approval	Specifies whether the document requires approval.						
Required Flag	Select the <b>Approval Required Flag</b> check box to select the doc-						

**Adding Documents** 

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

#### 4. Click Save.

The document is added to the test case and saved under the **Document Upload** tab.

Workspace Mappings	•	Test C	ase Summary							^
Mappings Transformations	*	€	•						*	×
🖌 🖬 Projects		#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Created By	Cre	ated D(
ABC (2)				_						
Transformations										
iest Cases 🖌 🖓 Test Cases		1	5	Techpubs				Administrator	2020-	-09-2
Tech Pubs 2 (v1.00)										- 11
TechPubs (v1.00)										- 11
🔺 📕 dgfd (0)										-
🙀 Transformations		4								•
🗞 Test Cases				< <	Records from 1 to 1	>I 🜔 Page 1 🚬 🗐	25 rows per page			4
Same and the second sec							•			
DigitalAdoption (0) erwinDIS (5)		4	Test Case Overview	Validation Steps	Document Upload					• 0
<ul> <li>Lineage Demo (12)</li> <li>Project (4)</li> </ul>		€								
project 1 (4)		#	Document Name	Document	ink	Document Status	Intended U	e Description	Options	
🖌 📕 Project Tech Pubs (7)										
🙀 Transformations		1	doc1			In Progress			1	x
Test Cases									_	
A 📑 Mappings										

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

## Preview( 📝 )

Use this option to preview the document.

Edit (🖊 )

Use this option to update the document details.

## Delete(X)

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

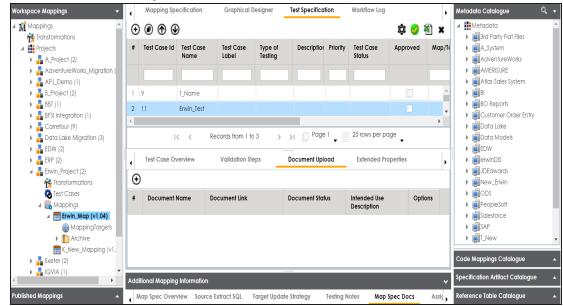
## **Adding Documents to Map-Level Test Cases**

To add documents to map-level test cases, follow these steps.

- 1. In the **Workspace Mappings** pane, click a mapping and click the **Test Cases** node of a project.
- 2. Double-click a map-level test case.

The Test Overviev	<i>к</i> р	age a	ppears.									
Workspace Mappings 🔹 👻	4	Mapping Spe	ecification	Graphical De	signer Tes	Specification	Wo	rkflow Log		Þ	Metadata Catalogue (	o <b>,  →</b>
Mappings	€	• • •	)						🕸 🤣 🕸	×	Metadata     Matadata     Matadata	<b>^</b>
<ul> <li>Projects</li> <li>A_Project (2)</li> <li>AdventureWorks_Migration (</li> <li>Adventure(1)</li> <li>Project (2)</li> </ul>	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approved	Map		
<ul> <li>BBT (1)</li> <li>BFSI Integration (1)</li> <li>Carrefour (9)</li> <li>Data Lake Migration (3)</li> </ul>	2 3	11	Erwin_Test New_Associatio	r Association	Source to Tar	ge Data Migrat				•	<ul> <li>BO Reports</li> <li>Customer Order Entry</li> <li>Data Lake</li> <li>Data Models</li> </ul>	, 
<ul> <li>EDW (2)</li> <li>ERP (2)</li> <li>Wruh_Project (2)</li> <li>Test Cases</li> <li>Mappings</li> <li>Mappings</li> <li>Envin_Mapp (v1.04)</li> </ul>	•	Test Case Ov		cords from 1 to Validation Step		Page 1		5 rows per page xtended Proper	•	•	BEDW     BervinDIS     BJDEdwards     BNew_Erwin     BODS     BPeopleSoft     Bsalesforce	
MappingTargets  Archive  K_New_Mapping (v1.		st Case Id	11 Erwin_Test			External T	est Case I	d			▶ ∎SAP ▶ ∎T_New	•
Exeter (2)     RVIA (1)		st Case Name* st Case Label	crwin_lest			Priority					Code Mappings Catalogue Specification Artifact Catalogue	• e •
Published Mappings	Тур	pe of Testing				Extendab	le 🗌				Reference Table Catalogue	•

#### 3. Click the **Document Upload** tab.



4. Click 🔁.

#### **Adding Documents**

The Add Test Case	Document page appears.	
Add Test Case Document		_ <b>_</b> ×
		Save Cancel
Document Name*	Document Owner	
Document Object	Drag-n-Drop files here or click to select files for upload.	
Intended Use Description		★
Approval Required Flag		

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

Field Name	Description				
	Specifies the name of the physical document being attached to the				
Document Name	test case.				
	For example, Source Metadata Details.				
Document Object	Drag and drop document files or use ≐ to select and upload doc-				
Document Object	iment files.				
Document Owner	Specifies the document owner's name.				
Document Owner	For example, John Doe.				
	Specifies the URL of the document.				
Document Link	For example, https://drive.google.com/file/I/2sC2_SZIyeFKI7OOn-				
	b5YkMBq4ptA7jhg5/view				
Intended Use	Specifies the intended use of the document.				
Description	For example: The document has information about the source				
	metadata.				

#### **Adding Documents**

Field Name	Description
Approval	Specifies whether the document requires approval.
Approval Required Flag	Select the Approval Required Flag check box to select the doc-
Required hag	ument status.
	Specifies the status of the document.
Document Status	For example, In Progress.
	This field is available only when the <b>Approval Required Flag</b> check
	box is selected.

#### 6. Click Save.

The document is added to the test case.

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

#### Preview( 🕑 )

Use this option to preview the document.

# Edit 🖊

Use this option to update the document details.

## Delete(🗙)

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

## **Managing Test Cases**

Managing project-level or map-level test cases involve:

- Updating test cases
- Exporting test cases
- Deleting test cases

# **Managing Project-Level Test Cases**

To update project-level test cases, follow these steps

To update test cases, follow these steps:

1. In the **Workspace Mappings** pane, click the **Test Cases** node.

Workspace Mappings 🔹	Test C	ase Summary						^
Mappings	€	⊕ ⊕						🐮 🗙
🖌 🏭 Projects	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Created By	Created Do
A_Project (6)     AdventureWorks_Migration								
<ul> <li>APJ_Demo (1)</li> <li>B_Project (2)</li> </ul>	1	26	T_Name	erwin	Production Validation Testing	Data integration projects for Erwin Sales.	Administrator	2020-01-2
<ul> <li>BBT (1)</li> <li>BFSI Integration (1)</li> </ul>								- 18
<ul> <li>Carrefour (9)</li> <li>Data Lake Migration (3)</li> </ul>								$\sim$
EDW (3)	<							>
ERP [3]			< <	Records from 1 to 1	> > D Page 1 🖕 🗐	25 rows per page		
Erwin_Feb (1) Erwin_Project (5)		Test Case Overview	Validation Steps Do	ocument Upload				
Transformations	<b> </b> •	lesi cuse overview	validation steps Do	comeni opioda				•
Test Cases						Ø		
🖌 🔒 Mappings						<i>v</i>		- 15
Erwin_Map	Test (	Case Id	26					- 15
K_New_Mapping	Test (	Case Label	erwin					
Trial_Map	Test (	Case Name*	T_Name					- 1
Erwin_Sales (1)	Type	of Testing	Production Validation Testing	9				
<ul> <li>Exeter (2)</li> <li>IQVIA (1)</li> </ul>	Test S	SQL Script	select * from dbo.ADS_ASSO	DCIATIONS		^		- 1
New_Project (3)								~
Published Mappings						_		~

- 2. In the Test Case Summary pane, click the required test case.
- 3. In the **Test Case Overview** tab, click **2**.
- Update the necessary information.
   For more information n fields, refer to Creating Test Cases topic.

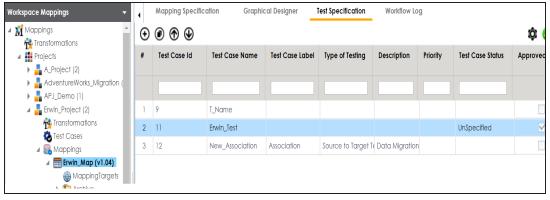
To export a test case, click the test case in the **Test Case Summary** pane, and click 1.

To delete a test case, click the test case in the **Test Case Summary** pane, and click

# **Managing Map-Level Test Cases**

To update map-level test case, follow these steps:

1. In the **Workspace Mappings** pane, click a map and click the **Test Specification** tab.



2. Click 🥑.

The Map and Test Cases Status page appears. You can update test case status in the Test Cases Grid and Map Test Status in the bottom pane.

	Map and Test Case	es Status								_ 🗆 X
										\$ 🗄 🛛
Tes	t Cases Grid									^
#	Test Case Label	Test Case Name	Test Case Status	Type of Testing	Description	Priority	Created By	Created On	Modified By	Modified On
1		Erwin_Test	UnSpecified				Administrator	2019-11-11 12:52:19	Administrator	2019-11-12 17:10:14
Mo	ıp Test Status									~
Г										
	Map Tes	t Status : Need	l Analysis	•						
	Testing N	Notes : 🕅	<u>А</u> <u>Н</u> В 2	Ÿ∐≣≣	≡ ■ 15 15	*≣ *≣ ◀	1			
							•			

To approve map-level test cases, follow these steps:

1. In the **Workspace Mappings** pane, click a mapping, and click the **Test Specification** tab.

Workspace Mappings 🔹 👻	4	Mapping Specifie	cation Graphic	cal Designer	Test Specification	Workflow Lo	g		
Mappings	€	۵							¢
Projects	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status	Approve
AdventureWorks_Migration ( APJ_Demo (1)									
🔺 📑 Erwin_Project (2)	1	9	T_Name						
🙀 Transformations 🗞 Test Cases	2	11	Erwin_Test					UnSpecified	5
A S Mappings	3	12	New_Association	Association	Source to Target T	Data Migration			
Erwin_Map (v1.04)     MappingTargets									

2. Click 🔯.

The Approved Test Cases page appears.

•	pproved Test Cases								_ 🗆 ×
									Ľ ×
Test C	ases Grid								
#	Test Case Label	Test Case Name	Test Case Status	Approved	Type of Testing	Description	Priority	Created By	Create
1		Erwin_Test						Administrator	2019-11

- 3. Select the check box against the test case under the **Approved** column.
- 4. Click Save.

To export a test case, click the test case in the **Test Case Summary** pane, and click **1**.

To delete a test case, click the test case in the **Test Case Summary** pane, and click

The Mapping Manager Dashboard displays metrics that help you analyze and track your projects and mappings. It presents this information using charts and graphs.

To access Mapping Manager Dashboard, follow these steps:

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

Projec	ct Summary		•	
#	Project Name	Project Description	Project Ow	
6	WhatfixIntegratior	<pre><iframe id="editorembed" style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top: -1000px;" tabindex="-1"></iframe></pre>		lelp
7	ABC	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top: -1000px;"&gt;</iframe>		Self Help
8	TechPubs			
9	Tech Pubs Online	<iframe <br="" id="editorembed" tabindex="-1">style="position: absolute; width: 0px; height: 0px; border: none; left: -1000px; top:</iframe>	-	
Mapa	oing Manager Dashbo	ard	•	
тарр	ing manager basilbo		-	

2. Click the Mapping Manager Dashboard pane.

The Mapping Manager Dashboard appears.

Mapping Manager Dashboard								-
Statistics	∑ Projects: <u>16</u>	$\Sigma$ Subjects: $\underline{0}$	∑ Mappings: <u>86</u>	∑ Source Tables: <u>44</u>	$\Sigma$ Target Tables: <u>46</u>	$\Sigma$ Possible Truncations: <u>84</u>	$\Sigma$ Users: <u>4</u>	ወ
Mapping Summary	Mapping	Status			Proactive Impact And	lysis - Truncation Impacts		<b>^</b>
35 <b>35</b> 357 357 357 357 357 357			100%			8 2 10 2 2 3 2 3 2 3 2 3 2 3 3 2 3 3 2 5 3 3 3 2 5 3 3 3 3		Self Help
Project Overview								
		7	6 •	6	4 3	30		Ţ

It displays the following panes:

- **<u>Statistics</u>**: It displays a snapshot of statistics related to mapping projects.
- Mapping Summary: It displays the number of mappings in each project.
- Mapping Status: It displays the number of mappings in each mapping state.
- Proactive Impact Analysis Truncation Impacts: It displays the number of instances of source truncation in each project.
- Project Overview: It displays the number of subjects, mappings, and assigned users in each project.
- Mapping Classification: It displays the number of active, archived, and published mappings in each project.
- Mapping Assignments: It displays the number of designers, approvers, developers, and testers assigned to mappings
- Sources/Targets Not Mapped: It displays the number of sources and targets not mapped in each project.
- **Test Case Status**: It displays the number of test cases under a test case status.
- **Project Test Cases**: It displays the number of test cases in each project.
- User Test Cases: It displays the number of test cases created by each user.

## **Statistics**

The Statistics pane displays the total number of projects, subjects, mappings, source tables, target tables, possible truncations, and users. For example, in the following image there are sixteen projects, eighty-six mappings, forty-four source tables, forty-six target tables, eighty-four possible truncations, and four users.

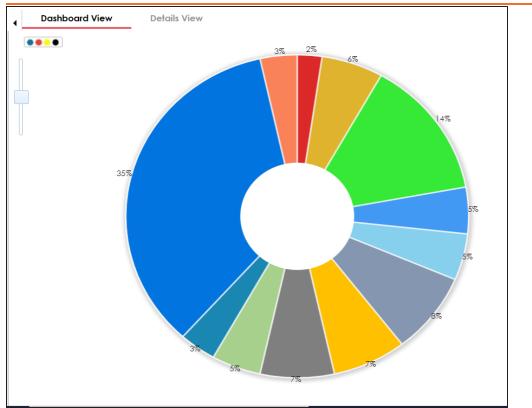
Statistics  $\Sigma$  Projects: 16  $\Sigma$  Subjects: 0  $\Sigma$  Mappings: 86  $\Sigma$  Source Tables: 44  $\Sigma$  Target Tables: 46  $\Sigma$  Possible Truncations: 84  $\Sigma$  Users: 4

You can click the hyperlink to view further details. For example, if you click the hyperlink for the Target Tables. The Target Table Details page appears.

🗖 Targ	jet Tables Details		
#	Table Name	Environment Name	System Name
1	Account	erwinSales	SQLTechPubs
2	Account	Presentation Layer	TABLEAU
3	Account	Presentation Layer	TABLEAU
4	Account	PRESENTATION LAYER	TABLEUAU
5	Account	TechPubs	PRESENTATION LAYER
6	Account	TechPubs	Salesforce
7	APPQOSSYS.WLM_CLASSIFIER_PLAN	TechPubs	Oracle
8	APPQOSSYS.WLM_CLASSIFIER_PLAN	TechPubs	Oracle

## **Mapping Summary**

The Mapping Summary pane displays the number of mappings in each project in a pie chart. To open the chart in the Dashboard View, click the pie-chart.



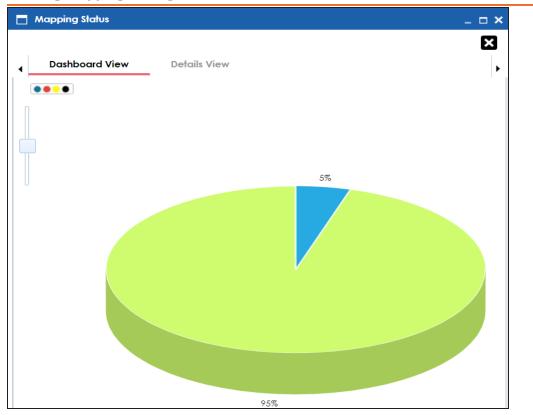
Each slice of the pie chart corresponds to a project. You can drill down and view detailed information in the list format. To view detailed information about mappings in a project, click a slice. The Details View tab opens. It displays project name, subject name, map name, and map version.

	Mapping Summary			_ <b>_ ×</b>
				X
•	Dashboard View	Details View		<b></b>
#	Project Name	Subject Name	Map Name	Map Version
1	<u>Lineage Demo</u>		Informatica m CBDR BDM CASA	1.00
2	<u>Lineage Demo</u>		Ialend staging	1.00
3	<u>Lineage Demo</u>		<u>test</u>	1.00
4	<u>Lineage Demo</u>		TestDataMap1	1.00
5	<u>Lineage Demo</u>		<u>TestMap2</u>	1.00
6	Lineage Demo		<u>TestMap3</u>	1.00
7	<u>Lineage Demo</u>		Tech Pubs	1.00
8	Lineage Demo		Create a New Map	1.00
9	<u>Lineage Demo</u>		how	1.00
10	<u>Lineage Demo</u>		Account Tableau Report	1.02
11	<u>Lineage Demo</u>		Line Mapping	1.00
12	Lineage Demo		map map	1.00

## **Mapping Status**

The Mapping Status pane displays the number of mappings under each mapping state in a pie chart. By default there are two mapping states, In Progress and Approved. You can create your own mapping states depending on your requirements. For more information on creating mapping states, refer to the <u>Configuring Mapping State Settings</u> topic.

To open the chart in the Dashboard View, click the pie chart.

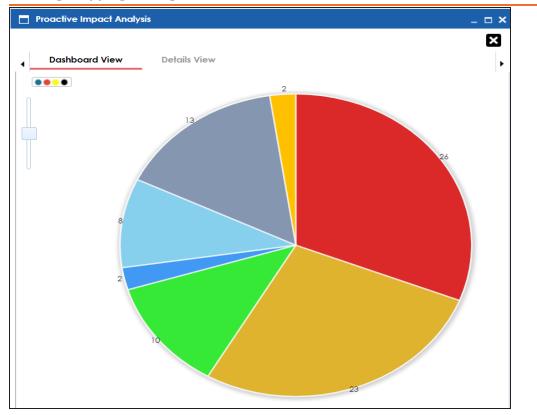


Each slice corresponds to a mapping state. You can drill down and view detailed information in the list format. To view detailed information about maps in a mapping state, click a slice of the pie-chart.

	Mapping Status				_ 🗆 ×
					×
4	Dashboard View	Details View	_		•
#	Project Name	Subject Name	Map Name	Map Version	State Name
1	<u>erwinDIS</u>		Data Integration	1.00	Approved
2	<u>erwinDIS</u>		SalesforceIntegratic	1.00	Approved
3	<u>erwinDIS</u>		<u>BugTrial</u>	1.00	Approved
4	<u>erwinDIS</u>		<u>erwinSalesIntegratic</u>	1.01	Approved

## **Proactive Impact Analysis - Truncation Impacts**

The Proactive Impact Analysis - Truncation Impacts pane displays the number of instances where the target column length is smaller than the source column length in each project in a pie-chart. To open the chart in the Dashboard View, click the pie chart.



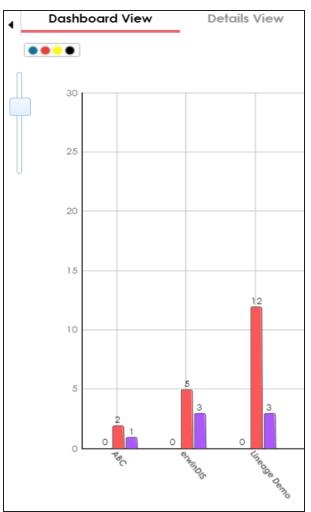
Each slice of the pie chart corresponds to a project. You can drill down and view detailed information in the list format.

To view detailed information about truncated sources in a project, click a slice of the pie chart. The Details View tab opens. It displays project name, subject name, map name, source and target column names.

4	Dashboard View	Details View										
#	Project Name	Subject Name	Map Name	Source Table Name	Target Table Name	Source Column Name	Target Column Name	Source Column Length	Source Column Precision	Target Column Length	Target Column Precision	Map Version
- 1	Test Source		mp STGTPCH SF10000	TPCH_SF10000.LINEITEN	stg.STG_LINEITEM	L_LINENUMBER	LINEITEM_HSH	38		16		1.00
2	Test Source		mp_STGTPCH_SF10000	TPCH_SF10000.LINEITEN	stg.STG_LINEITEM	L_LINENUMBER	UNEITEM_HSH_DIFF	38		16		1.00
3	Test Source		mp_STGTPCH_SF10000	TPCH_SF10000.LINEITEN	stg.STG_LINEITEM	L_ORDERKEY	TPCH_SF10000.ORDER	38		16		1.00
4	Test Source		mp STGTPCH SF10000	TPCH_SF10000.LINEITEN	stg.STG_LINEITEM	L_PARTKEY	TPCH_SF10000.PART_H	38		16		1.00

## **Project Overview**

The Project Overview pane displays the number of subjects, mappings, and assigned users in each project in a bar graph. To open bar graph in the Dashboard View, click the bar graph.



Each set of three bars corresponds to a project. You can view detailed information in the list format. To view the Detailed information about mappings, subjects, or assigned users of a project click the corresponding bar. For example, if you click the mappings bar then the Mappings tab opens.

4	D	ashboard View	Details Vie	ew		
4	Μ	appings	Subjects	Assigned Users		
	#	Project Name		Subject Name	Map Name	Map Version
	1	<u>erwinDIS</u>			Data Integration	1.00
	2	<u>erwinDIS</u>			SalesforceIntegration	1.00
	3	<u>erwinDIS</u>			<u>BugTrial</u>	1.00
	4	<u>erwinDIS</u>			<u>TechPubsBUgTrial</u>	1.00
	5	<u>erwinDIS</u>			<u>erwinSalesIntegration</u>	1.01

To view a list of subjects, click the **Subjects** tab.

To view a list of the assigned users, click the **Assigned Users** tab.

## **Mapping Classification**

The Mapping Classification pane displays the number of active, archived, and published mappings in each project in a bar graph. To open the bar graph in the Dashboard View, click the bar graph.

## Dashboard View **Details View** 30 25 20 15 12 10 Δ Richect Tech RUDS 1 rech Rups Online - quoject - project JechRups Pac SIGUIN SIGUIN Leage Demo

Each set of three bars corresponds to a project. You can drill down and view detailed information. To view detailed information about status of mappings in a project, click a bar. The Details View tab opens. It displays project name, subject name, map name, map version, and status.

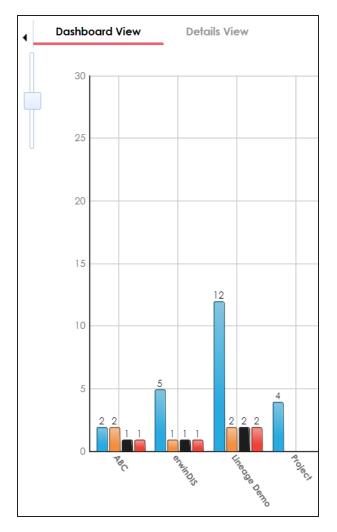
• Das	hboard View Details View					
#	Project Name	Subject Name	Map Name	Map Version	Status	Map Published
1	erwinDIS		BugTrial	1.00	Active	
2	erwinDIS		Data Integration	1.00	Active	
3	erwinDIS		erwinSalesIntegration	1.00	Passive	
4	erwinDIS		<u>erwinSalesIntegration</u>	1.01	Active	
5	erwinDIS		SalesforceIntegration	1.00	Active	
6	erwinDIS		TechPubsBUgTrial	1.00	Active	

#### Viewing Mapping Manager Dashboard

## **Mapping Assignments**

The Mapping Assignments pane displays the number of designers, approvers, developers, and testers assigned to mappings in each project in a bar graph. For more information on mapping assignments, refer to the <u>Assigning Mapping Specifications to Users</u> topic.

To open the bar graph in the Dashboard View, click the bar graph.



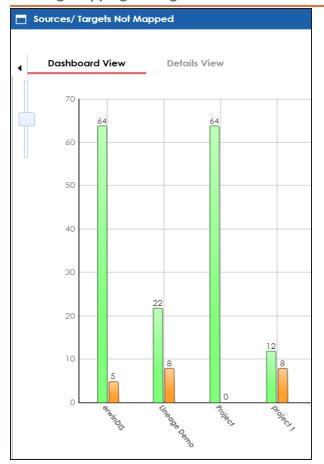
Each set of three bars corresponds to a project. You can drill down and view detailed information in the list format. To view detailed information about mapping assignments in a pro-

ject, click a bar. The Detail View tab opens. It displays project name, subject name, map name, assigned user's full name, and assignment status.

•		Dashboard V	iew	Details View	/				
4	#	Project Name	Subject Name	Map Name	Map Descriptio	Assigne Full Name	Responsib	Assignme Status	Last Modified By
1		<u>erwinDIS</u>		Data Integ		Administrat	Mapping D	In Progress	Administrator
2	:	<u>erwinDIS</u>		<u>Salesforcel</u>		Administrat	Mapping D	In Progress	Administrator
3	5	<u>erwinDIS</u>		<u>BugTrial</u>	Testing for (	Saras Ojha	Mapping A	Not Startec	Administrator
4		<u>erwinDIS</u>		<u>BugTrial</u>	Testing for a	Administrat	Mapping D	In Progress	Administrator
5	;	<u>erwinDIS</u>		<b>BugTrial</b>	Testing for a	Jane Doe	Mapping E	Not Startec	Administrator
6		<u>erwinDIS</u>		<u>BugTrial</u>	Testing for (	public - De	Mapping Te	Not Startec	Administrator
7		<u>erwinDIS</u>		TechPubsBI	TechPubsBl	Administrat	Mapping D	In Progress	Administrator
8		<u>erwinDIS</u>		<u>erwinSalesl</u>		Administrat	Mapping D	In Progress	Administrator

# Sources/Targets Not Mapped

The Sources/Targets Not Mapped pane displays the number of sources and targets not mapped in each project in a bar graph. To open the bar graph in the Dashboard View, click the bar graph.



Each set of two bars corresponds to a project. You can drill down and view detailed information in the list format. To view the detailed information about sources and target not mapped in a project, click a bar. The Details View tab opens. It displays project name, map name, and target and source details.

Viewing	Mapping	Manager	Dashboard
AIC MILLE	1110PPIIIB	i i i a i a b i a b i a b i a b i a b i a b i a b i a b i a b i a b i a b i a b i a b i a b i a b i a b i a b i	Dustinoutu

1	Dashboard View	Details View					•
•	Targets Not Mapped	Sources	Not Mapped				,
#	Project Name	Subject Name	Map Name	Target System Name	Target Environment Name	Target Table Name	Target Column Name
	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	SQN_NUM
2	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	LOAD_DTS
3	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	REC_SRC
4	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	MLTID
5	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	ВКСС
5	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	BWSC
7	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	SQN_NUM
3	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	LOAD_DTS
7	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	REC_SRC
10	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	MLTID
11	<u>Lineage Demo</u>		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	вксс
2	Lineage Demo		Account Tableau	Snowflake	Snowflake_STG	stg.STG_LINEITEM	BWSC
3	Lineage Demo		<u>map map(1.00)</u>	erwin DM	DM Landing	Citizens	CitizenID

## **Test Case Status**

The Test Case Status pane displays the number of test cases under a test case status in a pie chart. To open the chart in the Dashboard View, click the pie chart.

# Dashboard View

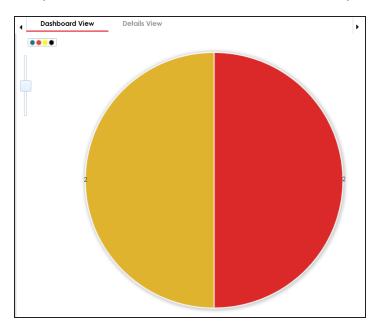
Each slice of the pie chart corresponds to a test case status. You can drill down and view detailed information in the list format. To open the detailed information about test cases, click a slice. The Details View tab opens. It displays project name, map name, and test case names.

•	Dashboard Viev	w Details V	liew			•
#	Project Name	Subject Name	Map Name	Test Case Id	Test Case Name	Test Ca Label
1	<u>Lineage Demo</u>			3	ETL Testing	Alpha
2	<u>Lineage Demo</u>		Account Tableau	4	Account_Tat	
3	<u>erwinDIS</u>			1	Validating sc	Alpha

#### Viewing Mapping Manager Dashboard

## **Project Test Cases**

The Project Test Cases pane displays the number of test cases in each project in a pie-chart. To open the chart in the Dashboard View, click the pie chart.



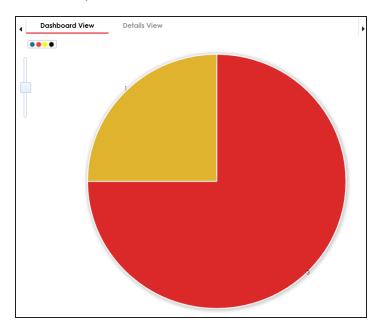
Each slice in the pie chart corresponds to a project. You can drill down and view detailed information in the list format.

To view the detailed information about test cases in a project, click a slice of the pie chart. The Details View tab opens. It displays project name, subject name, map name, test case ID, test case name, and test case label.

4	Dashboard View	Details View	-			•
#	Project Name	Subject Name	Map Name	Test Case Id	Test Case Name	Test Case Label
1	<u>erwinDIS</u>			1	Validating sour	Alpha
2	erwinDIS		Data Integration	2	Customer-Acco	Alpha

## **User Test Cases**

The User Test Cases pane displays the number of test cases created by each user in a piechart. To open the chart in the Dashboard View, click the pie chart.



Each slice of the pie chart corresponds to a user. You can drill down to view detailed information in the list format.

To view the detailed information about test cases created by a user, click a slice of the piechart. The Details View tab opens. It displays project name, subject name, map name, test case ID, test case name, and test case label.

•	Dashboard View	Details View				•
#	Project Name	Subject Name	Map Name	Test Case Id	Test Case Name	Test Case Label
1	<u>Lineage Demo</u>			3	ETL Testing	Alpha
2	<u>erwinDIS</u>			1	Validating sour	Alpha
3	erwinDIS		Data Integration	2	Customer-Acco	Alpha