erwin Data Intelligence

Best Practices Guide

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Best Practices

This guide walks you through the best practices and naming conventions that would help improve your experience of working on erwin Data Intelligence (erwin DI). The intended readers
include mapping admin, business analysts, and data stewards.

The recommendations in this guide are based on our expertize and learnings from our customers.

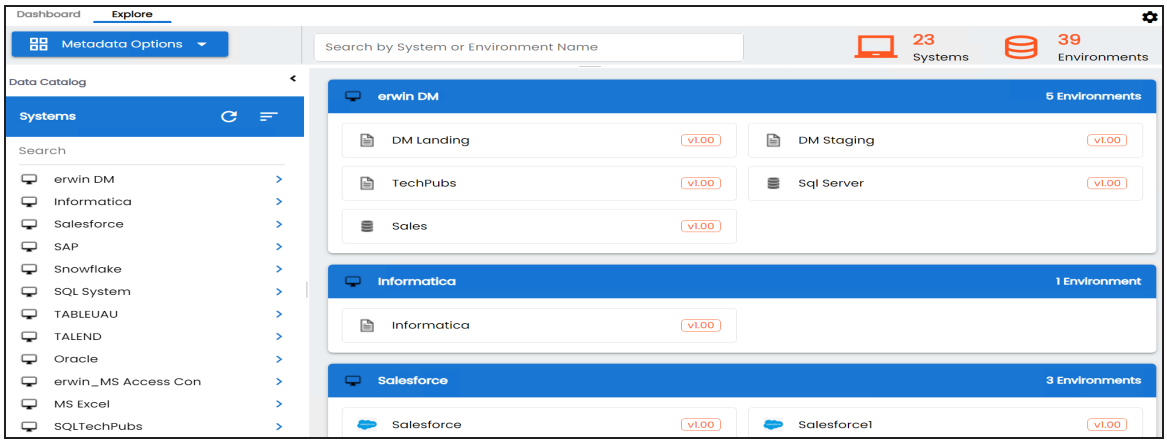
The guide includes best practices in:

- Metadata management
- Mapping management
- Business glossary management

Metadata Manager

To access Metadata Manager, go to **Application Menu** > **Data Catalog** > **Metadata Manager**.

The Metadata Manager page appears with the Data Catalog pane on the left.



You can create systems, environments, and scan source or target metadata in the Metadata Manager. After you scan metadata, you can browse through it in the Data Catalog. A repository stores metadata in a hierarchy, System > Environment > Table > Column. All these levels together form a data glossary. For more information on using Metadata Manager, refer to the Managing Metadata section. You can organize data glossary (systems and environments) in the Data Catalog using:

- Physical organization
- Logical organization

We recommend that you follow best practices and naming conventions for systems and environments depending on the type of organization.

Physical Organization

For physical organization, we recommend that you apply the following naming conventions for systems and environments:

Systems

Follow the naming conventions that your database administrators have set up.

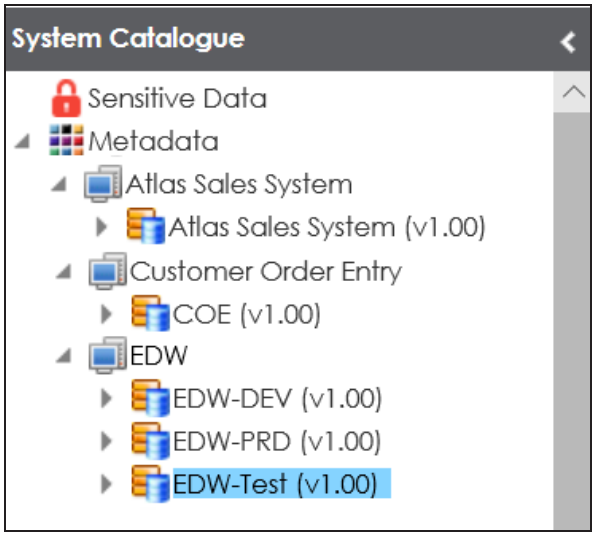
Use complete system name. For example, EDW or Enterprise Data Warehouse, or COE or Customer Order Entry.

Environments

Follow the naming conventions that your database administrators have set up.

Use standard naming conventions already in place to identify these environments. For example: EDW-PRD, EDW-Test, and EDW-DEV.

The following image shows an example of physical organization.



Logical Organization

For logical organization, we recommend that you apply the following naming conventions for systems and environments:

Systems

Use full system name. For example: Salesforce.

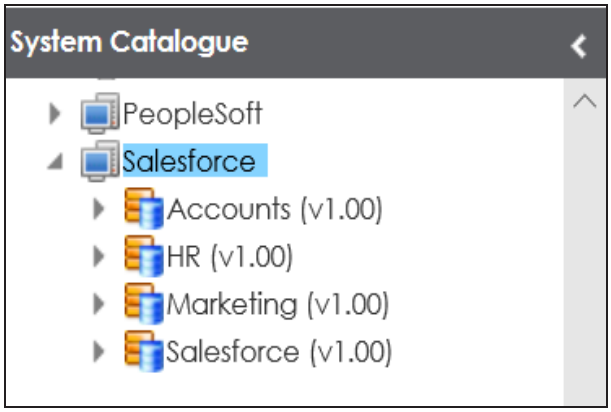
Environments

Use subject areas to name environments.

You can group tables into multiple subject areas. The subject areas can then be used to name environments. For example, Salesforce has 2000 tables grouped into multiple subject areas:

- Accounts
- HR
- Marketing
- Salesforce

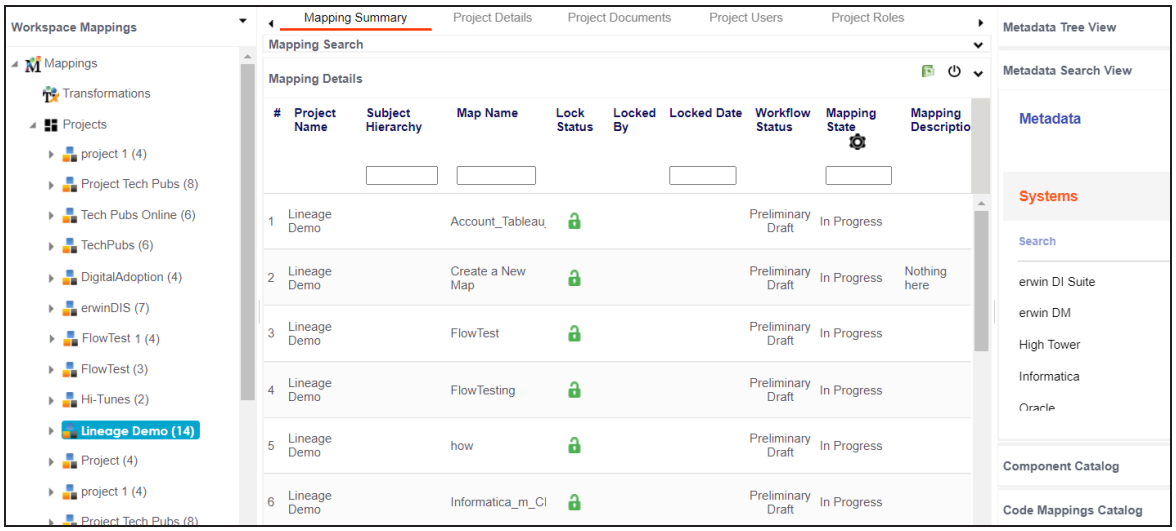
The following image shows an example of logical organization.



Mapping Manager

To access Mapping Manager, go to **Application Menu** > **Data Catalog** > **Mapping Manager**.

The Mapping Manager page appears with the Workspace Mappings on left.



For more information on using mapping manager, refer to the Mapping Manager section.

You can categorize mappings into project and subject area levels in the Workspace Mappings pane. To organize the mapping workspace, we recommend that you follow the best practices for:

- Projects
- Subject areas
- Mappings

Projects

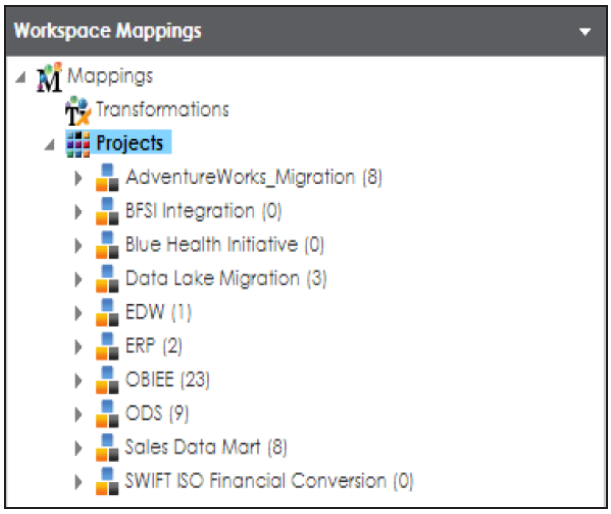
You can name projects the way you want. However, for better navigation and project discovery,
we recommend that you name projects based on either of the following:

- Target system
- Business initiative

Refer to the following table for some examples of project names:

Project Name	According to
Data Lake Migration	Business initiative as it is a data conversion project
SWIFT ISO Financial Conversion	Business initiative as it is a part of industry standard conversion mappings
EDW	Target system name
Sales Data Mart	Target system name

The following image shows project names in the Workspace Mappings pane.



Subject Areas

In a project, you can group and categorize mappings under subject areas. For more information on creating and managing subject areas, refer to the Creating Subject Areas topic.

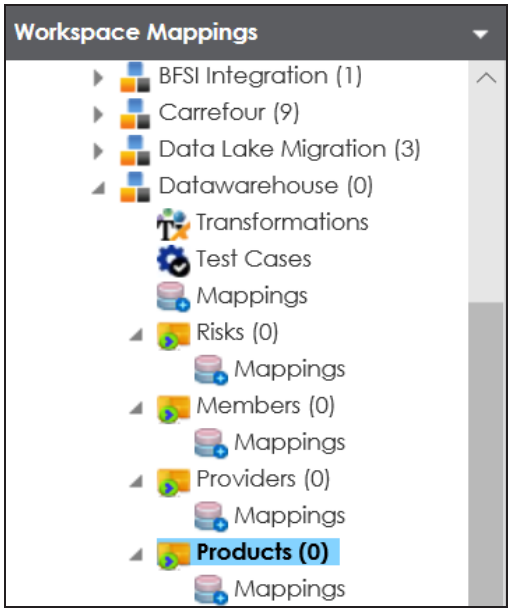
We recommend that you organize subject areas based on either of the following:

- Logical Organization
- Contributing source system

Logical Organization

You can create multiple subject areas under a project. We recommend that you group and organize mappings logically under subject areas for ease of access and management.

The following image shows an example of logical organization of mappings using subject areas.



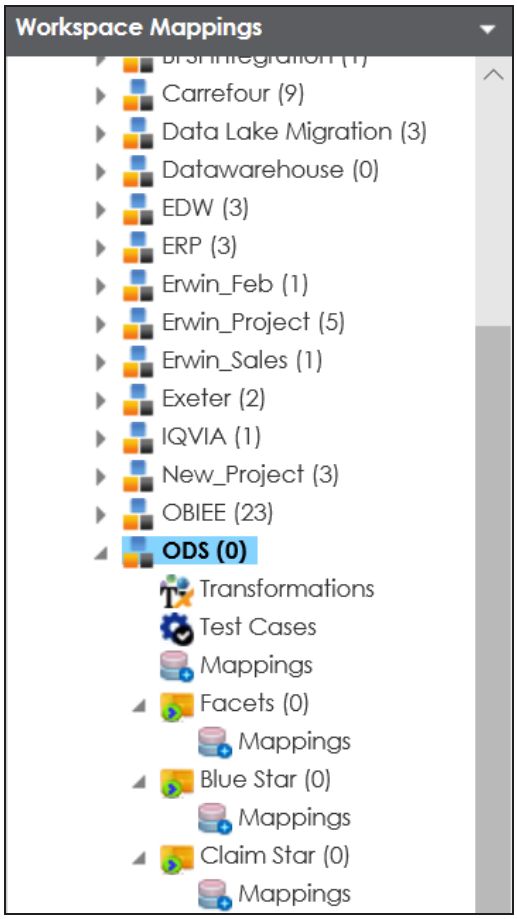
Datawarehouse is a large project with substantial number of mappings. It is organized logically using subject areas, such as:

- Risks
- Members
- Providers
- Products

Contributing Source Systems

A mapping project might involve multiple source systems. In such situation, we recommend that you use subject areas (named after the contributing source systems) to group mappings based on contributing source systems. This facilitates ease of access and management.

The following image shows an example of grouping of mappings based on contributing source systems.



Subject Areas

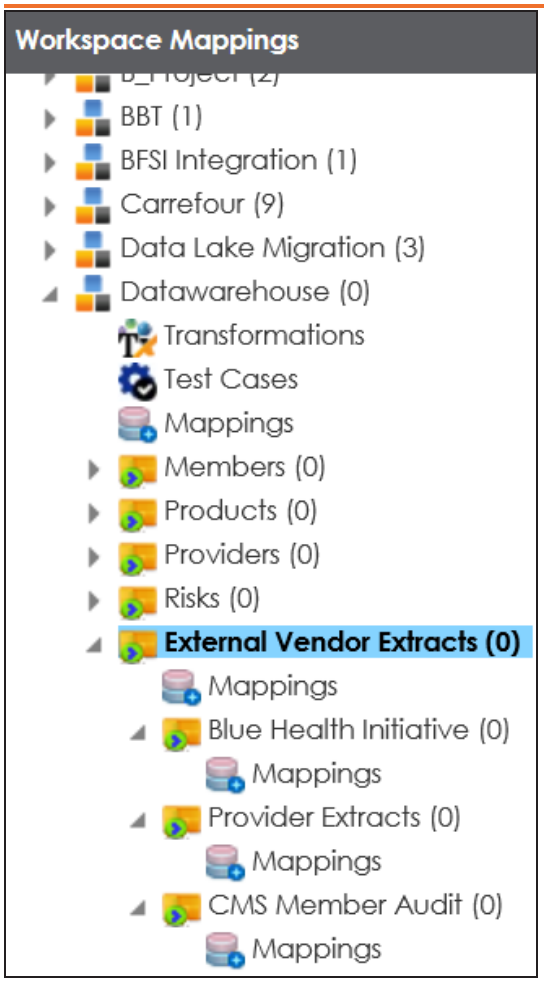
The ODS project is organized by three contributing source systems:

- Facets
- Blue Star
- Claim Star

You can also use nested subject areas for further grouping and categorization. Consider creating nested subject areas when mappings can be grouped by multiple:

- Contributing source systems
- Business initiatives
- Business partners

The following image displays an example of nested subject areas where External Vendor Extracts contains three subject areas.


Workspace Mappings
BBT (1)
BFSI Integration (1)
Carrefour (9)
Data Lake Migration (3)
Datawarehouse (0)
Transformations
Test Cases
Mappings
Members (0)
Products (0)
Providers (0)
Risks (0)
External Vendor Extracts (0)
Mappings
Blue Health Initiative (0)
Mappings
Provider Extracts (0)
Mappings
CMS Member Audit (0)
Mappings

Mappings

You can create mappings under a project or a subject area. A mapping may involve multiple sources and multiple targets. However, we recommend that you create one mapping for one target table and name it with a business meaning.

To adopt a naming convention use the combination of the following:

- Target system name (abbreviated acronym)
- Subject area name (abbreviated acronym)
- Source system name (abbreviated acronym)
- Mapping business name (based on target table/file being loaded)
- Physical table name (physical name of target table)

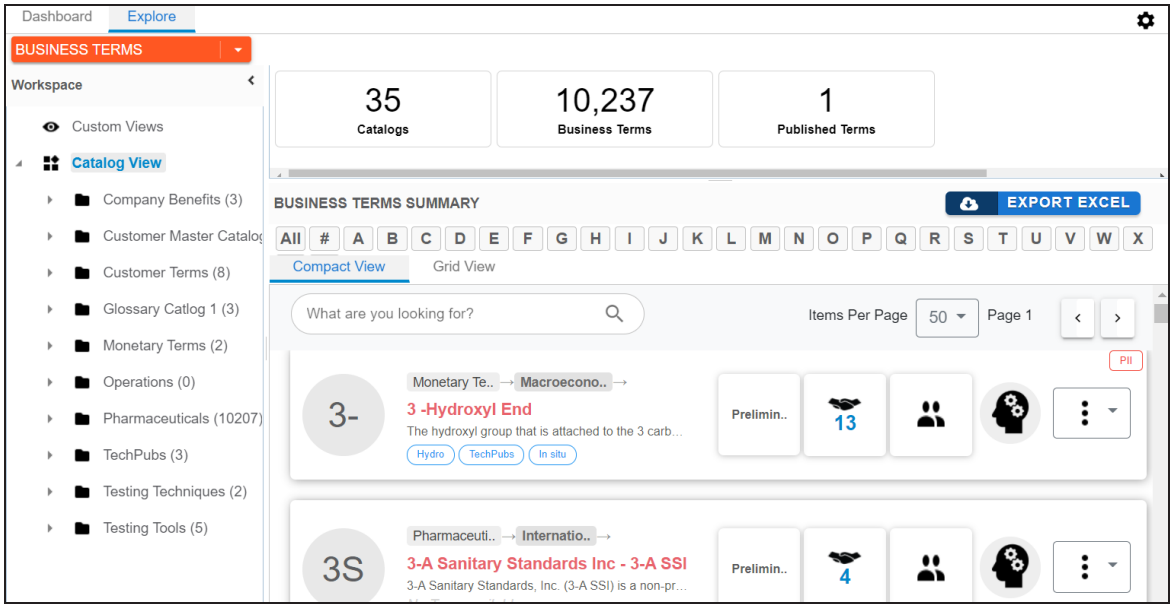
Refer to the following table for the recommended naming conventions:

Naming Convention	Comment
TargetSystem_SubjectArea_SourceSystem_MappingBusiness	This convention uses a combination of target system name, subject area name, source system name, and mapping business name. **We recommend this naming convention for readability and comprehensive understanding.**
SourceSystem_TargetSystem_MappingBusiness	This convention uses a combination of source system name, target system name, and mapping business name.
SourceSystem_PhysicalTable	This convention uses a combination of source system name and physical name of target table.
SourceSystem_MappingBusiness	This convention uses a combination of source system name and mapping business name.

Business Glossary Manager

To access Business Glossary Manager, go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.

The Business Glossary Manager page appears.



For more information on using Business Glossary Manager, refer to the Managing Business Glossary section.

Managing business glossary involves creating and defining business assets. It allows you to manage a common business vocabulary across the organization.

We recommend best practices to manage Business Glossary Manager by having better:

- Organization: It involves organizing business glossary in a way to improve ease of access and visibility.
- Governance: It involves best practices resulting in better governance in business glossary management.

Organization

We recommend that you organize business assets in a hierarchical manner for good visibility and ease of access. You can implement hierarchical structure with catalogs and sub-catalogs. For more information on creating catalogs and sub-catalogs refer to the Creating Catalogs topic.

You can design hierarchical structure with the help of the classification themes based on:

1. General and specific business assets

   The hierarchical structure includes:

   - General business assets under catalogs
   - Specific business assets under sub-catalogs

   For example, agreement is a general asset type whereas contract and purchase order are specific business assets.

2. Areas of interest or subject areas

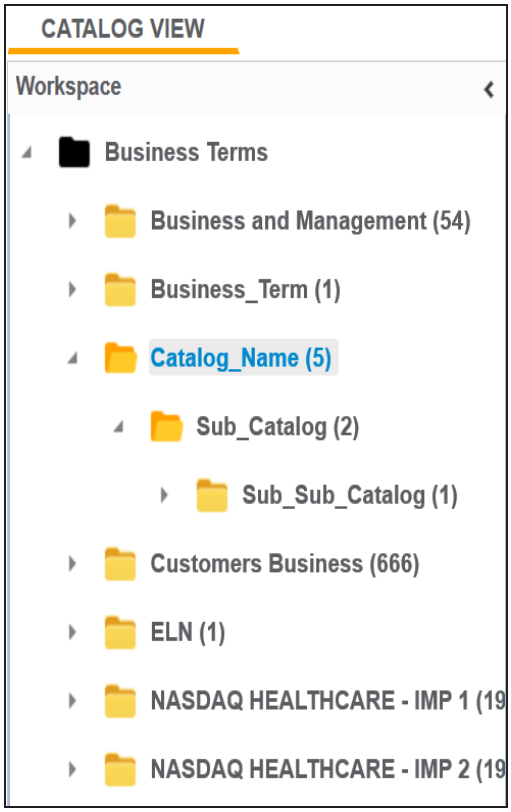
   The hierarchical structure includes:

   - Umbrella asset type under catalogs
   - Subject areas under sub-catalogs

   For example, you can breakdown the organization (umbrella asset type) into subject areas like sales, products, orders, shipments, and other related areas.

   The following image displays a hierarchical structure with catalogs and sub-catalogs

for business terms.



We recommend you to take note of the following things when building a classification theme:

- Every asset type may not fit neatly into a single classification.
- There may be instances where a term may be in multiple places.
- The nesting depth should not go beyond five levels.
- Avoid technical jargon or complexity.

We recommend you to have:

- Single business glossary: If you can standardize names and meaning of all business assets across the organization.

- Multiple business glossaries: If agreements cannot be reached on a single meaning for a business asset type. For example, in industries like healthcare and insurance you need to have multiple business glossaries.

Governance

A streamlined governance process in managing business glossary leads to a good level of trust among its end users. We recommend that you include a governance process which involves clearly defined process for:

- Submission of business assets
- Approval of business assets
- Making stewards responsible for business asset type's definition, purpose, and use.
- Quality measurement
- Progress measurement

Governance should be able to provide quality measurement. We recommend that you adopt
a standard and document parameters of a good definition of business assets. For example definitions:

- Must be stated in the present tense
- Must be stated in a descriptive phrase or sentence
- Should avoid acronyms and abbreviations
- Must not contain the words used in the term (tautology)

We recommend that you adopt a standard making stewardship consistent. You can measure progress in stewardship by measuring:

- Reduction in misunderstanding
- Number of users accessing the business glossary
- Reduction of synonym terms