erwin Data Intelligence

AIMatch Guide

Release v15.0

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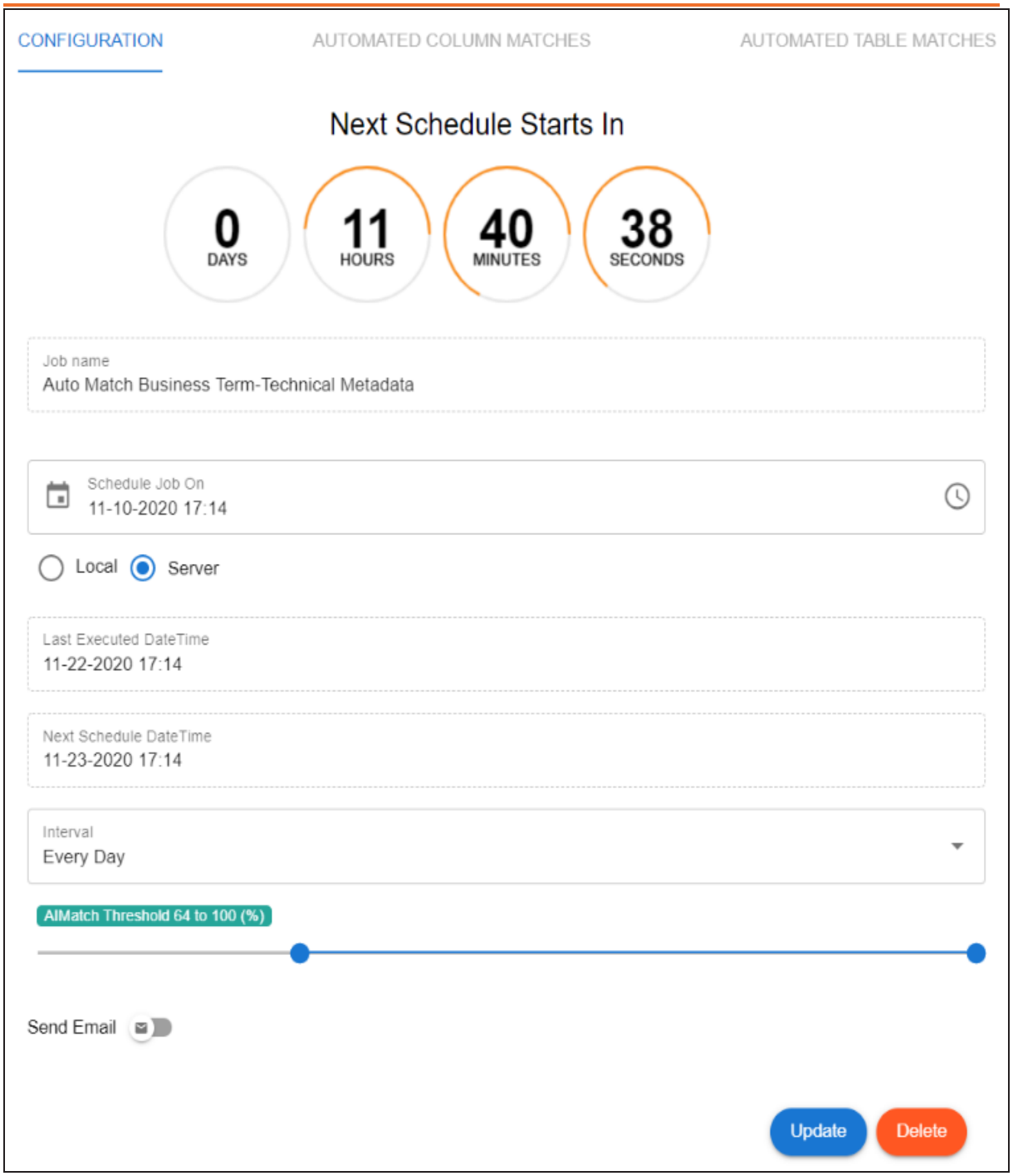
AIMatch

The AIMatch engine automatically finds and suggests the best possible table and column matches scores for business terms. These suggestions are scored based on their relevancy against business terms. Based on the match scores, you can then select and associate tables and columns with business terms.

To access AIMatch, go to **Application Menu** > **Data Literacy** > **AIMatch**.

The AIMatch page appears. By default, the Configuration tab opens.



Using the AIMatch engine involves:

1. Associating metadata for AI matching
2. Configuring AIMatch job
3. Associating table and column matches

Associating Metadata for AI Matching

Before scheduling an AIMatch job, you need to associate metadata to any business asset catalogs in the Business Glossary Manager. When the AIMatch job runs, the AIMatch engine finds matches between the associated metadata and business assets in the catalogs. You can also configure the AIMatch for Sensitive Data Detection.

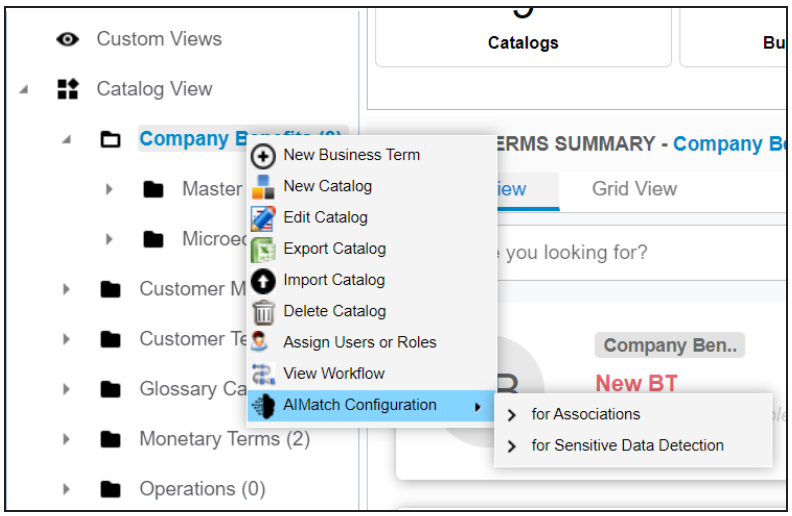
To associate metadata for AI match, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**.

   By default, the business terms view is displayed in the Asset Workspace pane.

2. In the **Asset Workspace** pane, right-click a catalog.

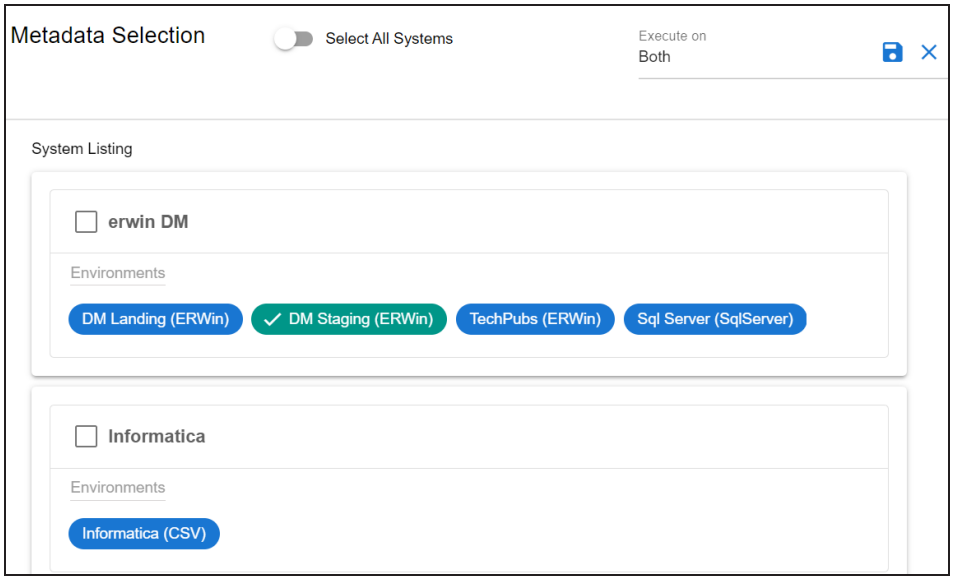
   The options available for the catalog appear.



3. Hover over the **AIMatch Configuration** to click either of the following option:

   - **for Associations**
     Click this option to find matches between associated metadata and business terms.
   - **for Sensitive Data Detection**
     Click this option to detect sensitive data for associations.

The Metadata Selection page appears. It displays a list of systems available in your erwin Data Intelligence (erwin DI) ecosystem.



1. Under **System Listing**, select the required systems and environments.
2. From the **Execute on** option, select one of the following options:
   - **Both**:
     Use this option to use both, table and column names under the selected systems and environments to find matches.
   - **Table Name**:
     Use this option to use table names under the selected systems and environments to find matches.
   - **Column Name**:
     Use this option to use column names under the selected systems and environments to find matches.

     You can execute only the Column Name option to configure AIMatch job **for Sensitive Data Detection**.
3. Click .

The selected metadata is associated with the catalog.

Once metadata is associated with catalogs, you can schedule an AIMatch job to find matches between the associated metadata and business terms in the catalogs. For more information on scheduling AIMatch job, refer to the Configuring AIMatch Job topic.

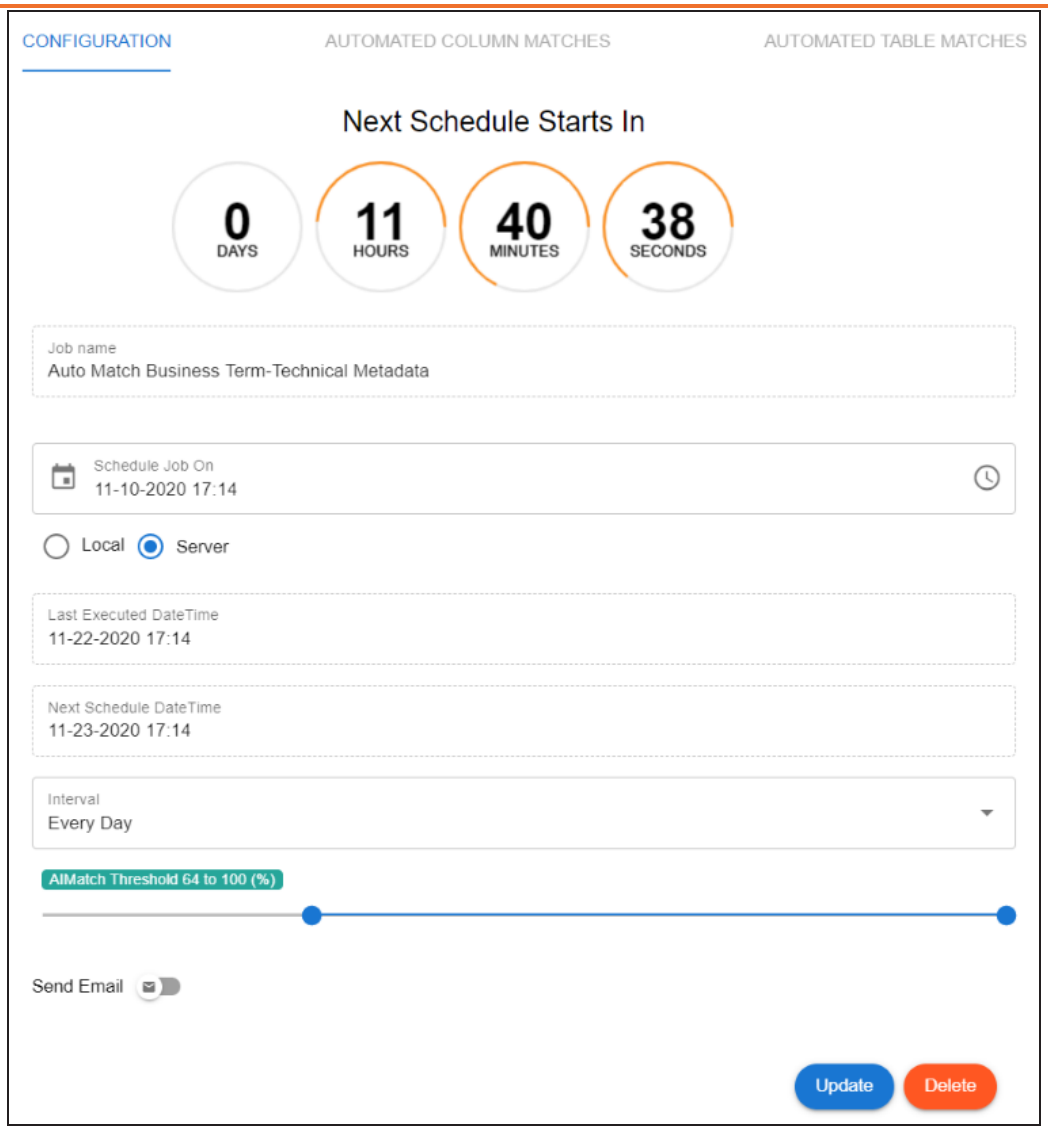
Configuring AIMatch Job

After associating metadata to business term catalogs, you can schedule an AIMatch job to find matches between the associated metadata and business terms. The job also scores the matches based on their relevancy.

To schedule AIMatch job, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **AIMatch**.

   The AIMatch page appears. By default, the Configuration tab opens.



2. Enter or select appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Job Name	Specifies the job name. For example, Auto Match Business Term-Technical Metadata. This field autopopulates with a job name and cannot be edited.

Field Name	Description
Schedule Job On	Set the date and time of the job using and . For example, 03-24-2020 11:45.
Local or Server	Select whether the job uses local or server time. • Local: Refers to your local machine. • Server: Refers to the machine where your application is deployed.
Last Executed Date Time	Specifies the date and time when the job was run last. For example, 06-15-2020 09:13
Next Sched-uled Date Time	Specifies the date and time when the job will run next. For example, 06-16-2020 09:13
Interval	Specifies the frequency of the job. You can run the AIMatch job daily, weekly, or monthly.
AIMatch Threshold	Adjust the AIMatch Threshold slider to select a percentage match range for AIMatch job.
Send Email	Switch **Send Email** on ( ) to enable email notifications about the job. **Email Id**: It is autopopulated with your email ID. **CC Email Id(s)**: Enter email IDs that should receive email notifications about the job. For example, talon.smith@mauris.edu.

3. Click **Update**.

The job is scheduled and is executed at the scheduled date and time. The resultant matches for tables and columns are available on the Automated Table Matches and Automated Column Matches tabs.

You can select and associate tables and columns with business terms based on the match scores, and classify relevant data sensitive based on your requirements.

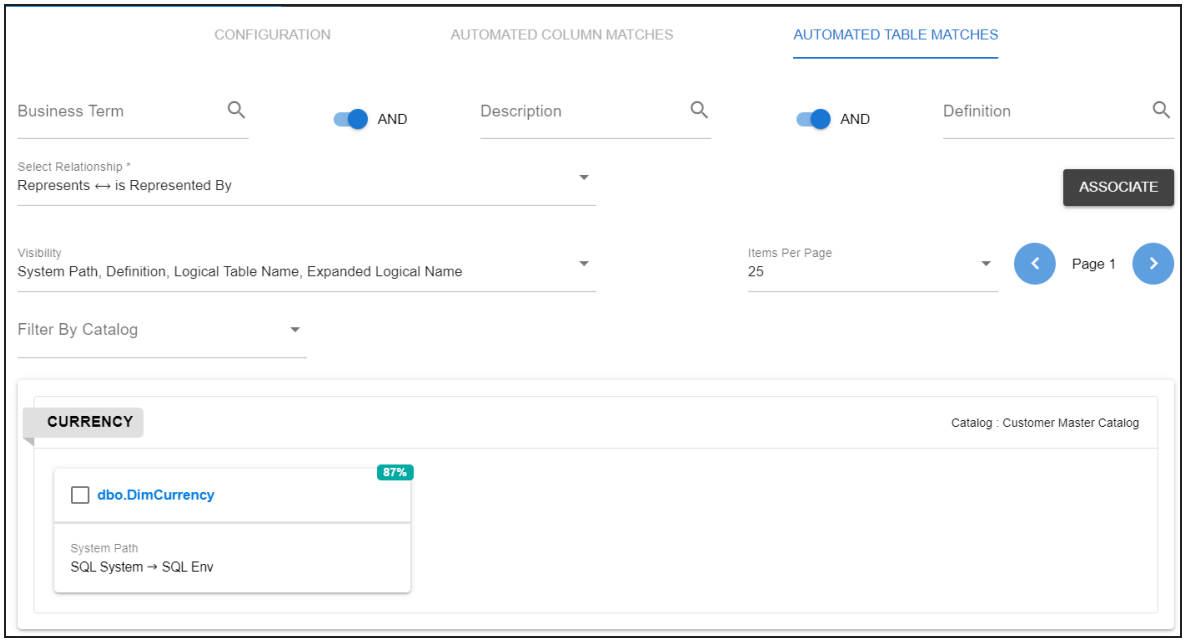
Associating Table Matches

After the AIMatch job runs, the resultant matches for tables are available on the Automated Table Matches tab in a card format. Each match card displays a match score in percentage based on the relevancy between tables and business terms.

To associate tables with business terms using the automated table matches, follow these steps:

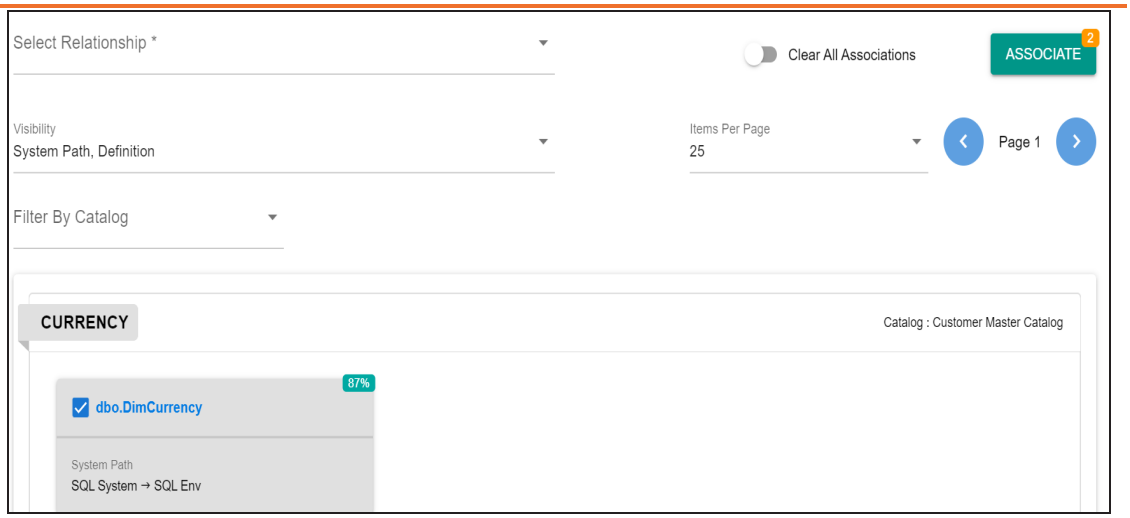
1. Go to **Application Menu** > **Data Literacy** > **AIMatch** > **Automated Table Matches** tab.

   Table matches with their match score in percentage appear in a card format.



2. Select the required table matches.

   This enables the Select Relationship list and the Association button.



3. From the **Select Relationship** list, select the relationship between tables and business terms.
4. Click **Associate**.

   The selected tables are associated with the business terms.

You can also refine the available matches using the filters and visibility options.

Filter

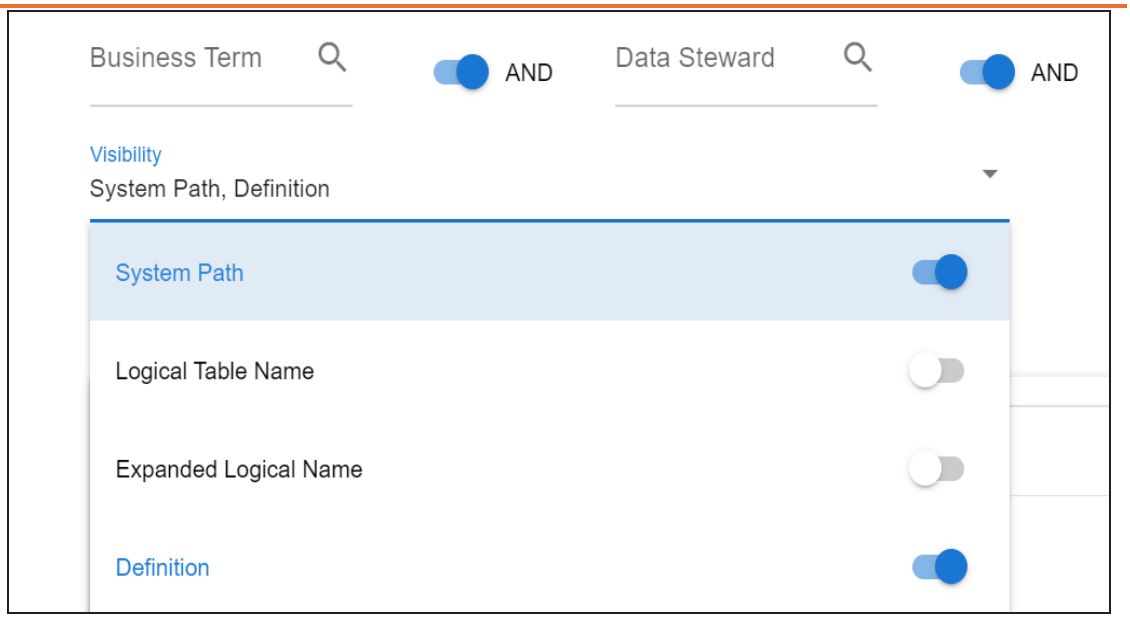
You can filter the table match cards based on AND or OR combinations of Business Term, Description, and Definition. You can also filter the table match cards based on Catalog.

Visibility

You can control the visibility of information on the table match cards.

To control the visibility of information on table match cards, use the drop down options under **Visibility**.

For example, in the following image, it is opted to view System Path and Definition on the table match cards.


Business Term
AND
Data Steward
AND
Visibility
System Path, Definition
System Path
Logical Table Name
Expanded Logical Name
Definition

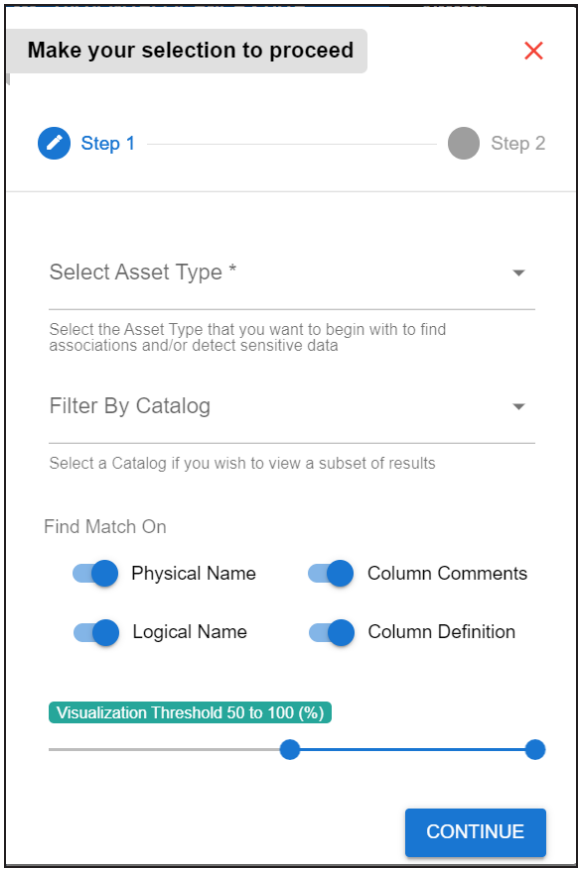
Associating Column Matches

After the AIMatch job runs, the resultant matches for the columns are available on the Automated Column Matches tab in a card format. Each match card displays a match score in percentage based on the relevancy between columns and business assets.

To associate columns with business assets using the automated column matches, follow these steps:

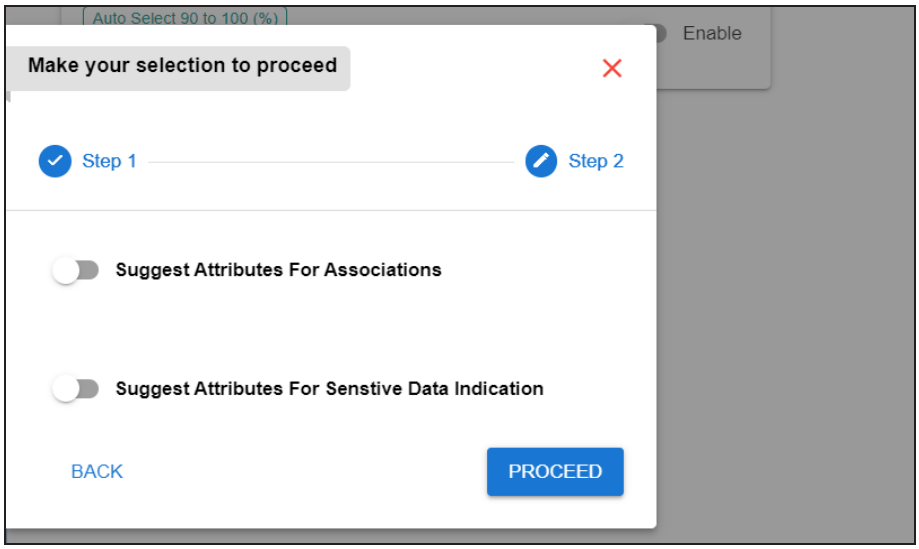
1. Go to **Application Menu** > **Data Literacy** > **AIMatch** > **Automated Column Matches** tab.

   The configuration page appears.



2. Under **Step 1** page, select an asset type, a filter category and find match option.

3. Click **Continue**.
   The step 2 for configuration appears.

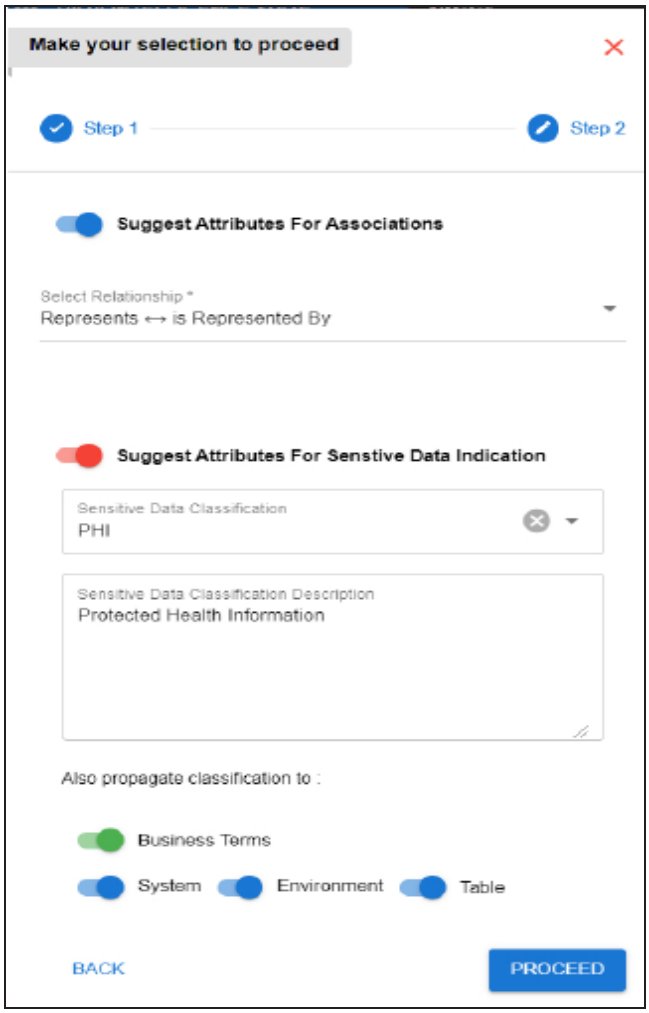


4. Under **Step 2**, use the following options:

   - **Suggest Attributes For Association**
     Switch this option on to select a relationship from the **Select Relationship** drop-down list.
   - **Suggest Attributes For Sensitive Data Indication**
     Switch this option on to enable the following options:
     - **Sensitive Data Classification:**
       Select a sensitivity classification from the drop-down list.
     - **Sensitive Data Classification Description:**
       This field displays the description of the selected classification type.
     - **Also propagate classification to:**
       Enable the relevant objects to apply a sensitivity classification for business terms, systems, environments, and tables.

> You can use one of the **Suggest Attributes For Association** and **Suggest Attributes For Sensitive Data Indication** options or use both.

For example, see the following image, where the **Suggest Attributes For Association** and **Suggest Attributes For Sensitive Data Indication** options are enabled.

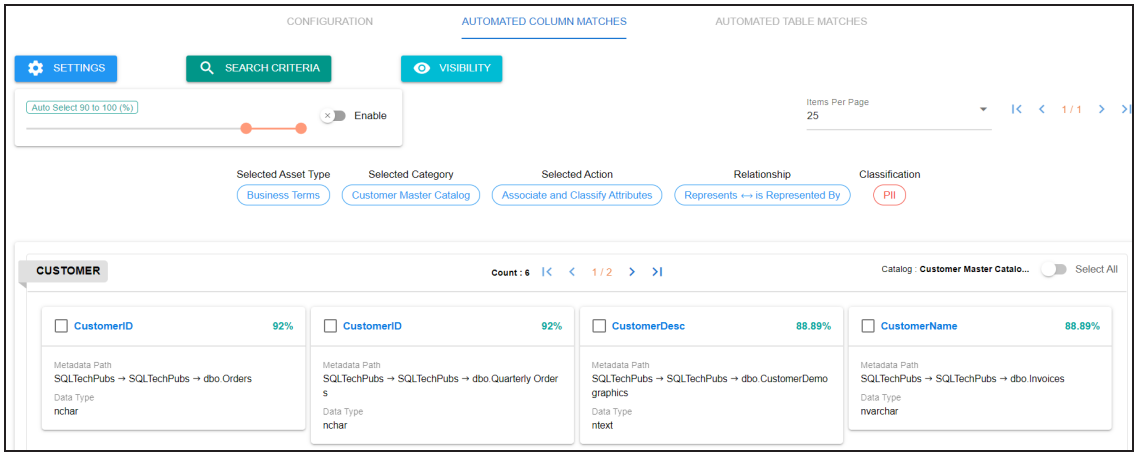


5. Click **Proceed**.
   Based on the configuration, column matches are displayed in the card format along with their match score percentage in a card format.

> Once the column matches are displayed, you can click the **Settings** option to re-configure the suggested attributes for associations and sensitive data classification.

6. Select the required column matches.
   Selecting columns enables the Associate and Classify Attributes button.

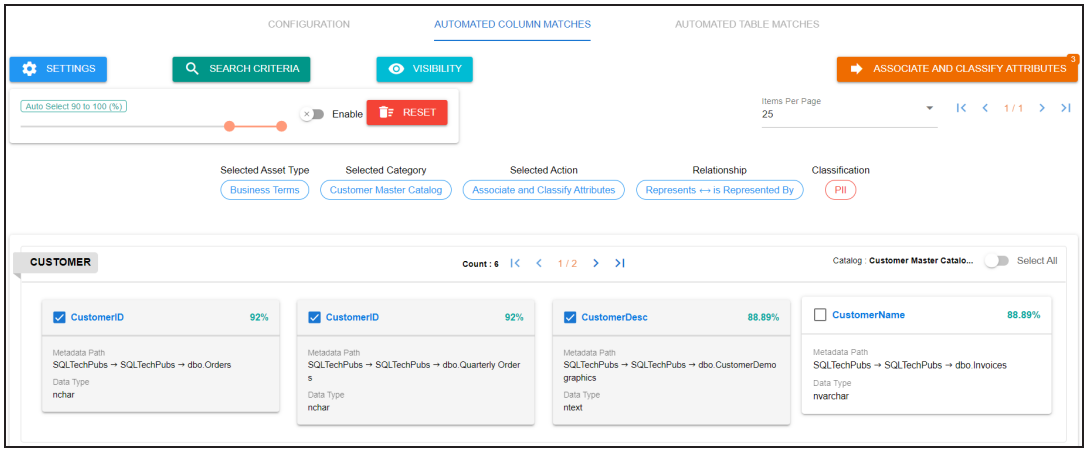
> You can also refine the matches using the search criteria, visibility setting, and filter matches based on percentage options.



7. Click one of the following options:

   - **Associate Attributes:**
     Use this option to associate the selected columns with business assets. This option appears if you enable the Suggest Attributes For Association option during column match configuration.
   - **Classify Attributes:**
     Use this option to classify the selected columns as sensitive. This option appears if you enable the Suggest Attributes For Sensitive Data Indication option during column match configuration.
   - **Associate And Classify Attributes:**
     Use this option to associate the selected columns with business assets and classify the selected columns as sensitive. This option appears if you enable the Suggest Attributes For Association and Suggest Attributes For Sensitive Data Indication options during column match configuration.
     For example, the following image displays the Associate And Classify Attribute

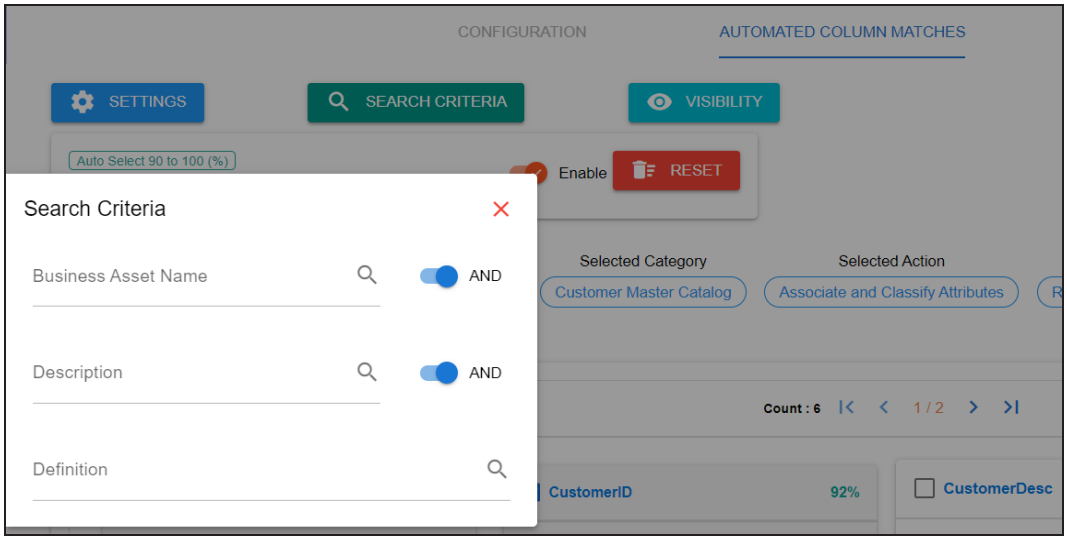
option.



Search Criteria

You can filter the column matches based on AND or OR combinations of Business Asset Name and Description. You can also filter the column matches based on Definitions.

To filter column matches, click **Search Criteria** and configure the required options.

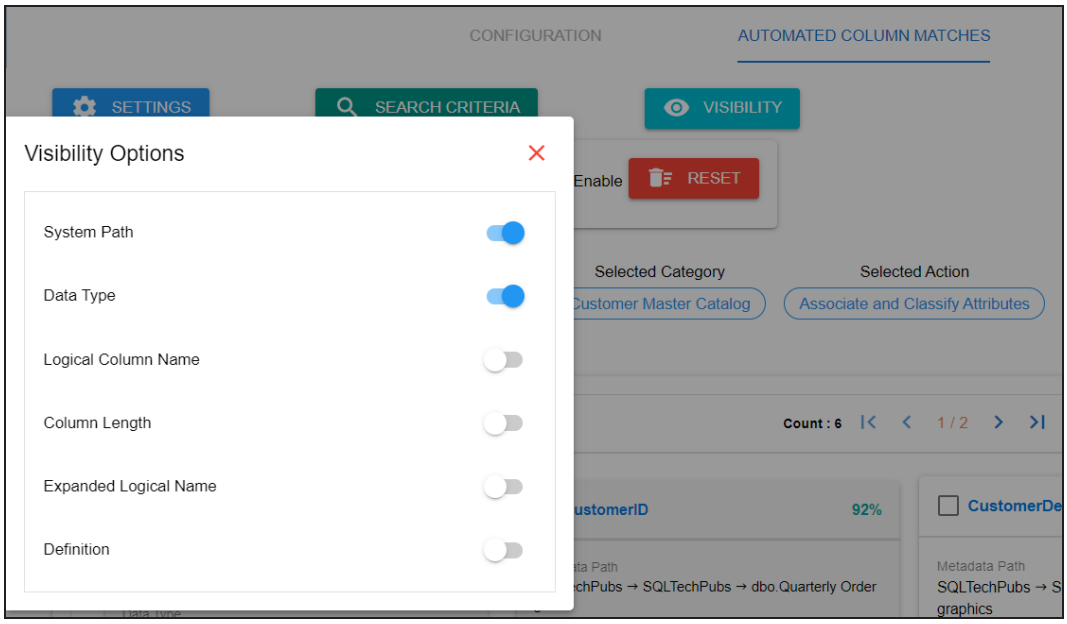


Visibility

You can customize the information displayed on the column match cards.

To set visibility on column match cards, click **Visibility**. Then, switch ON the required objects to view their information on the Automated Column Matches tab.

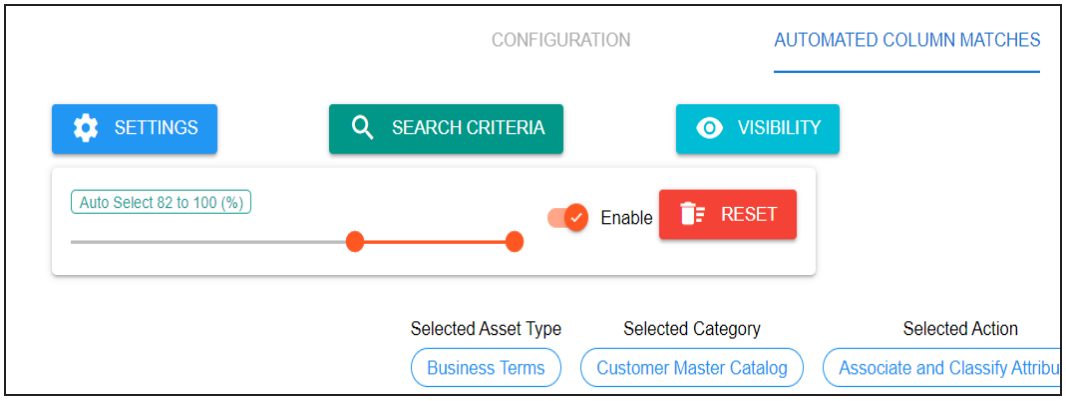
For example, in the following image, System Path and Data Type are switched on to be visible on the column match cards.



Filter based on Match Percentage

You can filter the column matches based on a match percentage range.

To filter matches based on percentage, switch on the **Enable** option. Then, drag to adjust the slider and set a match percentage range.



You can click **Reset** to reset your column selections and search criteria settings.