

Physical Data Catalog – an Overview

How does the Data Catalog Work

The metadata manager stores all data assets (physical assets) in a shared repository. Data Assets can be categorized into a folder structure i.e. Systems.

Assets are the equivalent of an **Environment** in metadata manager

The Assets can be created from the metadata manager as standard physical assets or a new asset can be registered via the Business User Portal by any non-logged in business user and a workflow process can be triggered to ensure the necessary approvals are in place prior to approving the asset and harvesting the physical metadata.

Prerequisite - Communication between DI Suite and BUP instances

Every DI Suite instance needs to be configured to communicate with its BUP instance in order to make the Data Catalog registration process work from the Portal

Connect DI suite to the BUP

- Login to the DI Suite application
- Go into the Settings → Miscellaneous → BUP Details → Instances page
- Click on the ADD icon and in the resulting pop up window, enter the BUP URL and save
- This will map the DI Suite instance to the BUP instance

The screenshot shows the 'Instances' page in the DI Suite application. The page has a breadcrumb trail: 'Miscellaneous Settings' > 'BUP Details' > 'Instances'. A table lists instances with columns for Name, URL, Description, Status, Up Since, Edit, Delete, and History. A red arrow points to the 'ADD' icon in the top right corner. Another red arrow points to the 'Edit Instance' dialog box that is open over the table. The dialog box contains fields for Name (BUP), URL (http://localhost:8080/BUP_GA_92/), and Description (BUP for the DI Suite application). A red arrow points to the 'Save' button in the dialog box.

If you have entered the correct BUP URL, you will see the status with a GREEN flickering dot icon

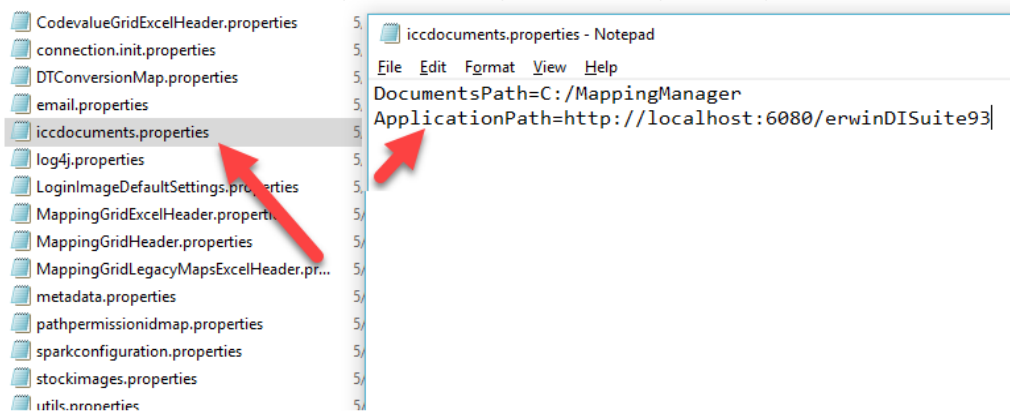
The screenshot shows the 'Instances' page with the instance configuration completed. The table now shows one instance with a green dot in the Status column. A red arrow points to the green dot.

#	Name	URL	Description	Status	Up Since	Edit
1	BUP	http://localhost:8080/BUP_GA_92/	BUP for the DI Suite application	●	03/05/2019 05:07	

Define DI Suite URL for dynamic hyperlink to be populated in Asset Registration emails

The Asset Registration process sends out automated email notifications. The following configuration is needed so that the application can get the full URL of the application and include it in the emails. The email notifications will contain a hyperlink to the workflow queue for easy review and approval of assets

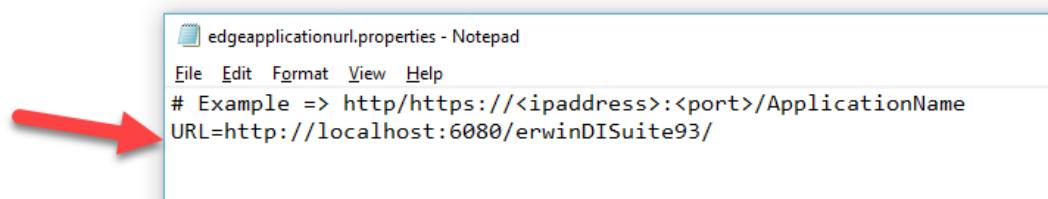
- Go into the tomcat folder - <tomcat drive>\webapps\erwinDISuite_v93\WEB-INF\configuration\properties
- Open the iccdocuments.properties file
- Update the URL against the **ApplicationPath** variable
 - E.g. ApplicationPath=http://localhost:6080/erwinDISuite93



Connect BUP to the DI Suite to load the Asset Registration form via API calls

- Go into the following BUP folder - <tomcat drive>\Apache Software Foundation\webapps\BUP_GA_92\WEB-INF\configuration\properties
- Open the **edgeapplicationurl.properties** file
- Update the URL against the **URL** variable
 - E.g. URL=http://localhost:6080/erwinDISuite93/

Name	Date modified	Type	Size
edgeapplicationurl.properties	4/30/2019 12:16 PM	PROPERTIES File	1 KB
iccdocuments.properties	3/16/2019 3:57 PM	PROPERTIES File	1 KB
license.lic	3/16/2019 3:57 PM	LIC File	1 KB
utils.properties	3/16/2019 3:57 PM	PROPERTIES File	1 KB



CONCLUSION:

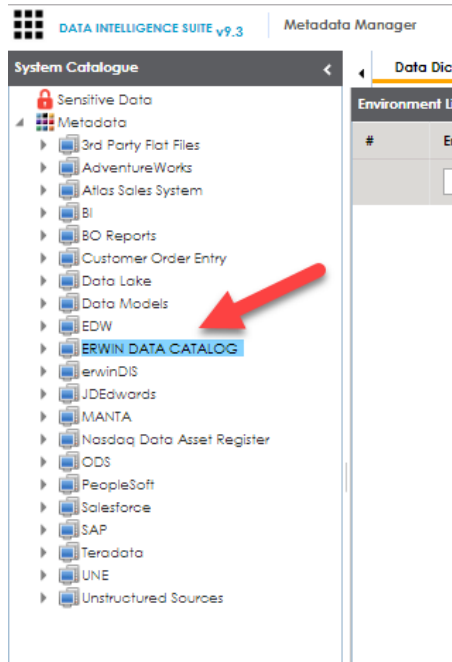
The above configurations ensure that your DI Suite and BUP Instances are now ready to communicate with each other and enable the Data Asset Registration Process from the BUP

Setting up the Data Catalog Area in the DI Suite

Set up the required Systems (folders) to categorize the data assets into
The metadata manager stores the data catalog and the harvested metadata systems

For the data catalog, set up the required system (one example is shown below)

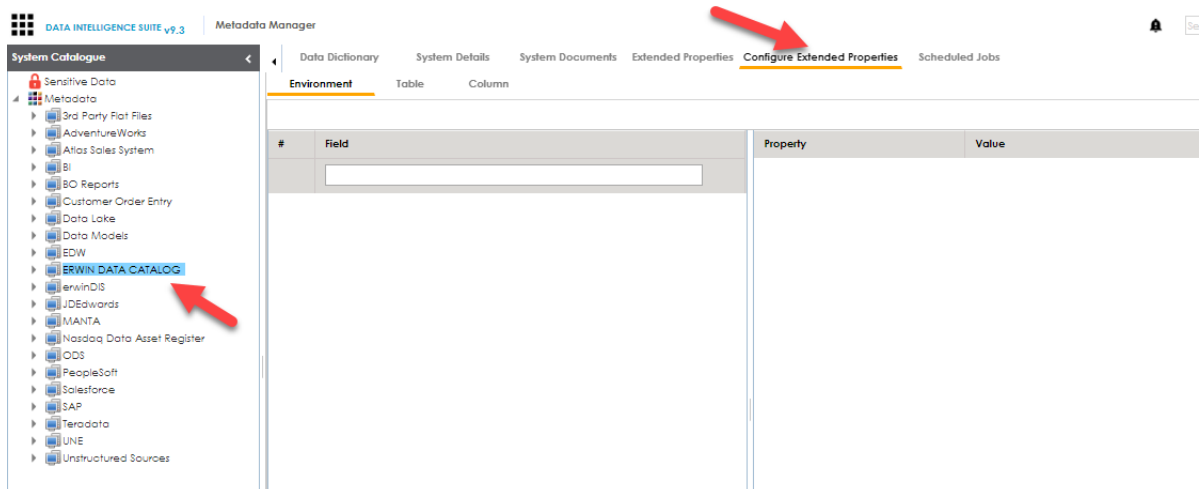
Create a new System for the data catalog e.g. ERWIN DATA CATALOG



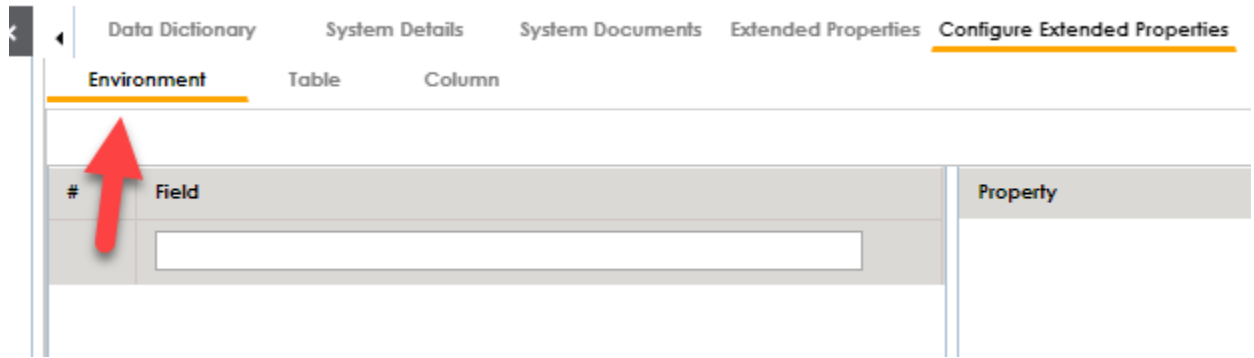
Setting up the UI form for the Asset Registration Process using extended properties

For the Catalog System, set up the UI form using the extended properties editor

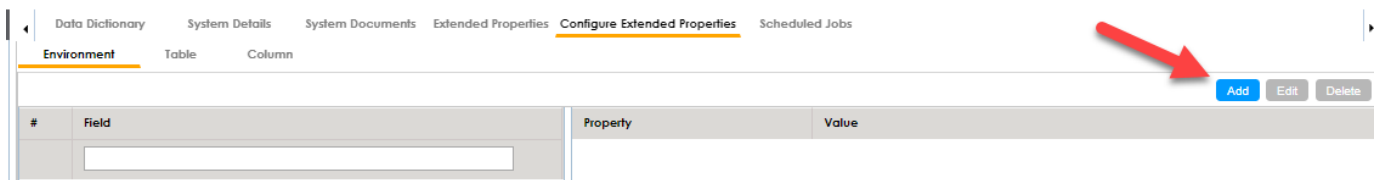
For a system e.g. ERWIN DATA CATALOG, go into the "Configure Extended Properties" tab to set up the form for the Data Registration process



All User Defined Properties for the Asset Registration Process should be configured under the “Environment” tab of the extended properties.

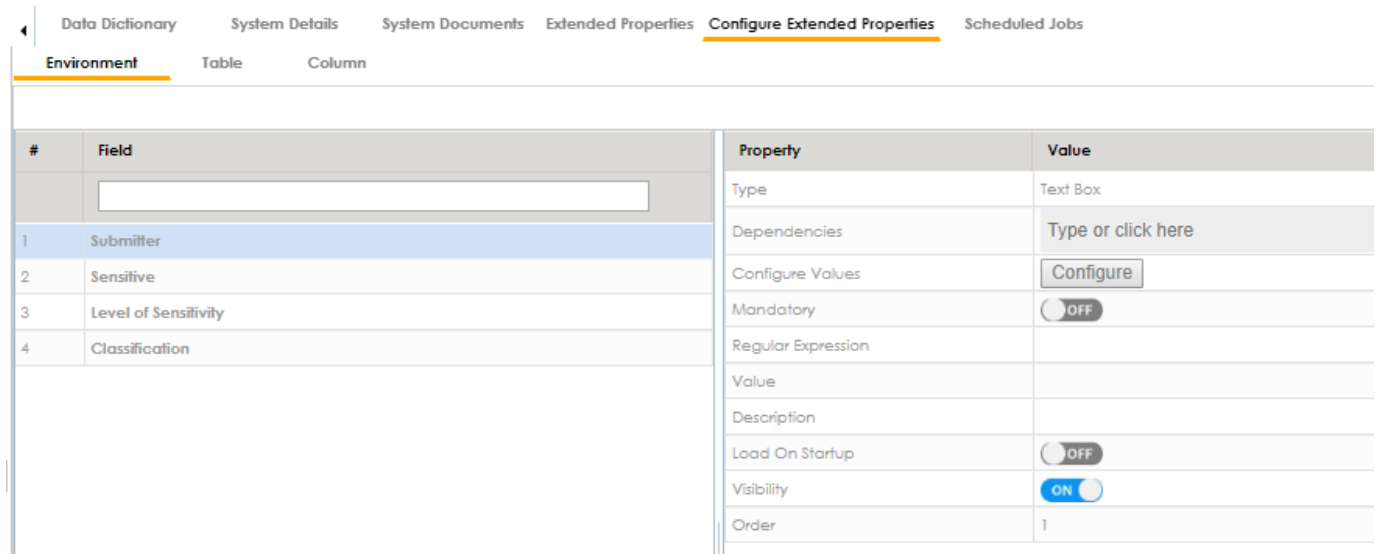


Click the ADD button to start configuring User Defined properties for the Registration process



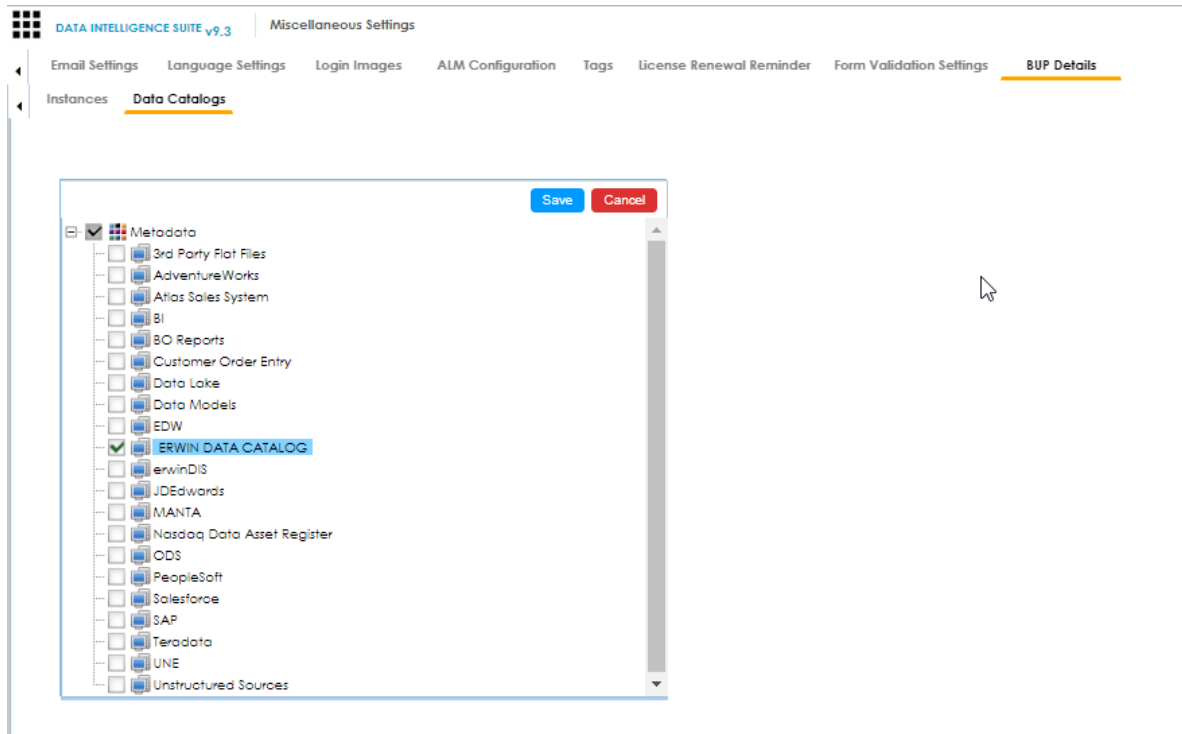
Set the VISIBILITY of the UI elements to ON for these elements to display in the BUP form.

A completed form looks as follows



You can configure the Systems that need to display for the Data Asset Registration process so you have the metadata and data catalog separated.

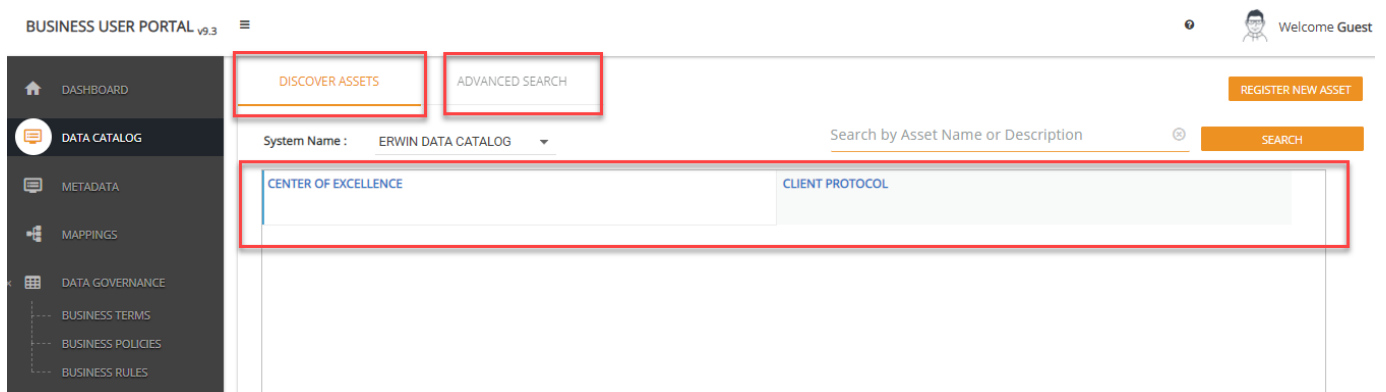
- To do this, go into Settings → Miscellaneous → BUP Details → Data Catalogs screen
- Here, select the required Systems using the checkboxes and save.
- Only these Systems will be available in the BUP Asset Registration area



BUP – DATA CATALOG AREA AND ASSET REGISTRATION PROCESS

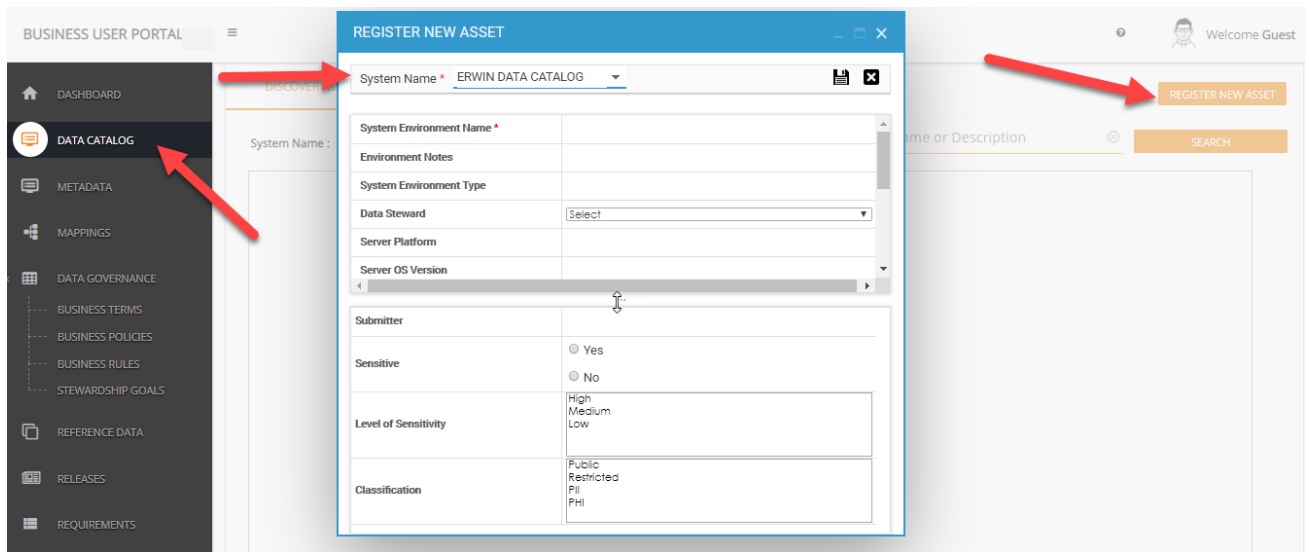
Go into the BUP → Data Catalog section

The DATA CATALOG menu option gives you access to all the data assets



Discover Assets – the Discover Assets area shows all published assets with the ability to search by asset name. the information shown on this screen is limited to the Asset Name and Description. Click on the asset name to view all related details.

Advanced Search – the advanced search screen shows a pivoted grid with all the extended properties for the asset to search by any extended property and filter down the information.



Register a new Asset

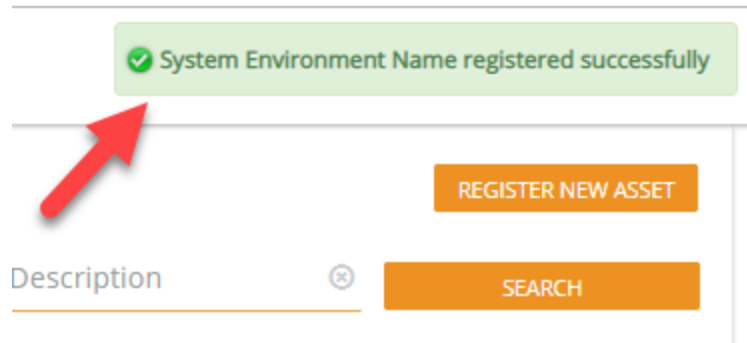
To register a new asset, click the “REGISTER NEW ASSET” button. A new pop up window opens and displays the list of Systems in the drop down. Selecting a system loads the UI form relevant to that system along with all custom properties (extended properties).

Create a new asset by entering all the required information e.g. new asset being created is **CENTER OF EXCELLENCE**

Please note that the labels can all be modified to meet customer naming conventions using the settings area

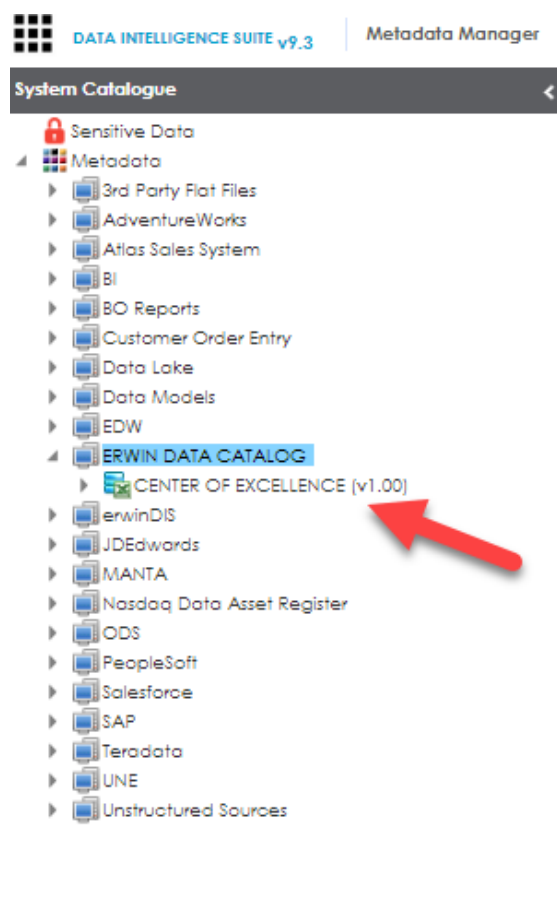
e.g. **System Environment Name** can be updated to **Data Asset Name**

REGISTER NEW ASSET	
System Name *	ERWIN DATA CATALOG
System Environment Name *	CENTER OF EXCELLENCE
Environment Notes	
Submitter	KARTIK SRIDHAR
Sensitive	<input type="radio"/> Yes <input checked="" type="radio"/> No
Level of Sensitivity	High Medium Low
Classification	Public Restricted PII PHI



The New asset e.g. **CENTER OF EXCELLENCE** is registered under the respective System and this triggers a workflow behind the scenes. *

***Prerequisite** - ensure that a workflow has been created upfront and assigned to a system so all assets being created within that system follow the applicable workflow



Use the metadata manager's workflow queue to move assets back and forth through the review and approval processes.