

# Metadata Management Tutorial

Data Governance Naming  
Standards  
with erwin Data Modeler  
Using erwin Metadata Management  
(EMM)

**TABLE OF CONTENTS**

<b>1</b>	<b><i>Introduction</i></b>	<b>4</b>
1.1	Conventions used in the tutorial	5
<b>2</b>	<b><i>Populating a Business Glossary with Naming Standards</i></b>	<b>6</b>
<b>3</b>	<b><i>Exporting a Business Glossary to erwin Data Modeler Naming Standards</i></b>	<b>9</b>

# Metadata Management Tutorial – Data Governance Naming Standards with erwin Data Modeler Using erwin Metadata Management (EMM)

## TABLE OF FIGURES

Figure 1 -	New Business Glossary inside New Folder in the Repository Panel .....	6
Figure 2 -	Glossary tab in Naming Standards Editor dialog .....	6
Figure 3 -	Viewing the resulting CSV file in Microsoft Excel .....	7
Figure 4 -	Viewing the GlossaryImportSample.csv file in Microsoft Excel .....	7
Figure 5 -	Resulting glossary spreadsheet ready to load into erwin Metadata Management (EMM) ...	8
Figure 6 -	Resulting business glossary in erwin Metadata Management (EMM) .....	8
Figure 7 -	Resulting exported CSV file from business glossary in erwin Metadata Management (EMM)	9
Figure 8 -	Resulting CSV file ready to load into erwin Data Modeler .....	9
Figure 9 -	Glossary tab in Naming Standards Editor dialog .....	10
Figure 10 -	Resulting glossary tab in erwin Data Modeler .....	10

## 1 Introduction

A large number of erwin Data Modeler customers have spent a great deal of effort developing naming standards which are used as part of the physical model definition and forward engineering of models into database implementations. The erwin Metadata Management (EMM) features a data governance based glossary feature which may contain terms with physical “abbreviations”. These terms may also be used for enforcing naming standards are physical models of databases, big data sources, etc., managed as documentable models within erwin Metadata Management (EMM).

This document provides step-by-step instructions as to how one may integrate these two capabilities using the CSV file format available for both erwin Data Modeler and erwin Metadata Management (EMM).

### Disclaimer

Some of the features detailed in this document may not apply and/or be available for the particular erwin Metadata Management (EMM) edition you may have.

## 1.1 Conventions used in the tutorial

The following font conventions will be used throughout the tutorial.

- User Interface item – **New**
- Submenu item – **New › Folder**
- Terminology item – *model content* item
- Name or label reference – **Accounts Payable**

## 2 Populating a Business Glossary with Naming Standards

First, create a new folder in your repository. Then create a new business glossary inside that folder:

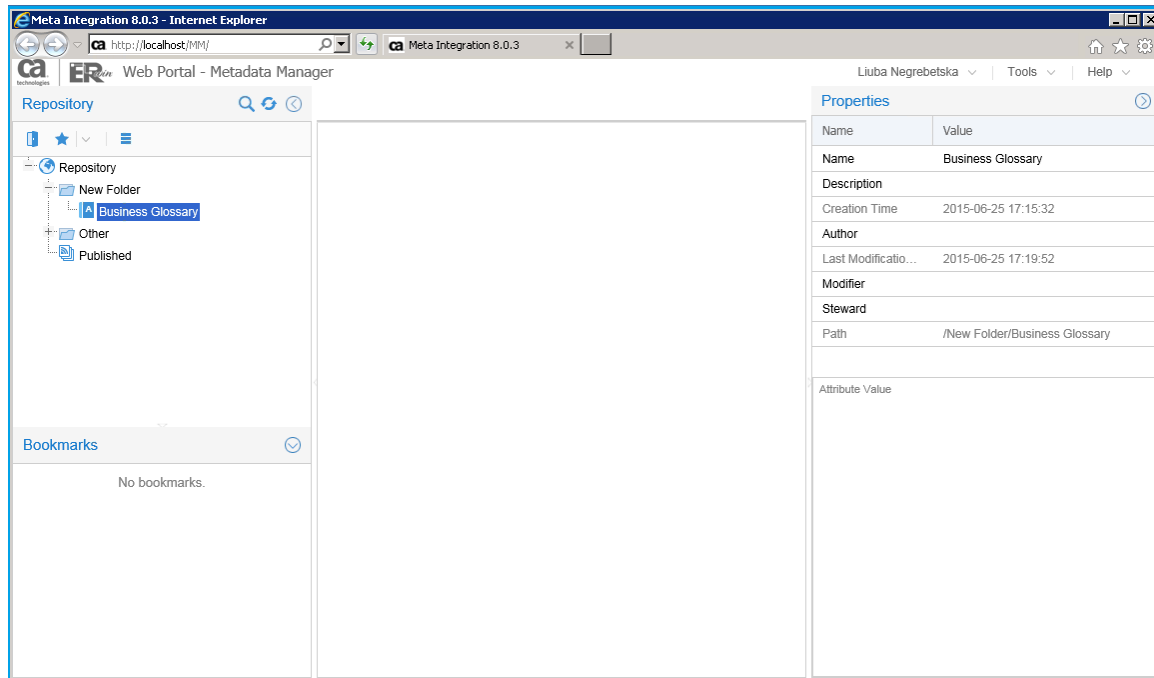


Figure 1 - New Business Glossary inside New Folder in the Repository Panel

Now, open the eMovies.erwin model in erwin Data Modeler, and go to Tools ➔ Standards ➔ Naming Standards and click on the Glossary tab:

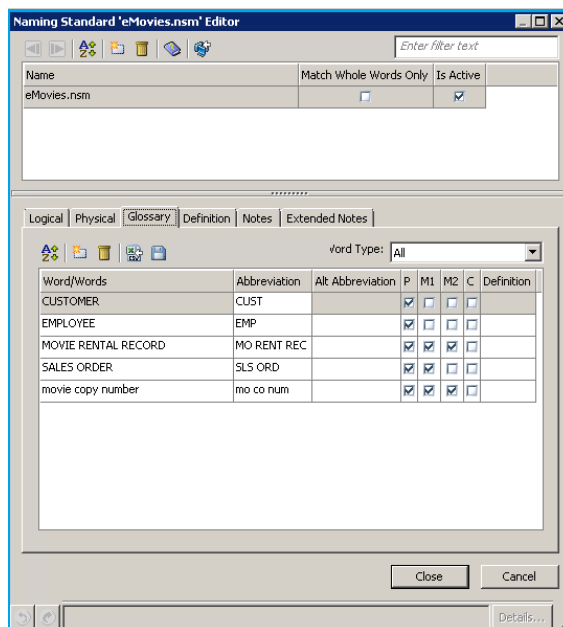


Figure 2 - Glossary tab in Naming Standrds Editor dialog

## Metadata Management Tutorial – Data Governance Naming Standards with erwin Data Modeler Using erwin Metadata Management (EMM)

Now click on the Save icon and save the CSV file.

	A	B	C	D	E	F
1	CUSTOMER	CUST		X		
2	MOVIE RENTAL RECORD	MO RENT REC		X	X	X
3	EMPLOYEE	EMP		X		
4	SALES ORDER	SLS ORD		X	X	
5	movie copy number	mo co num		X	X	X
6						

Figure 3 - Viewing the resulting CSV file in Microsoft Excel

Note this file is formatted in the manner that erwin Data Modeler expects. We now must convert it to the format that the erwin Metadata Management (EMM) business glossary expects.

To determine what that format is, go to the erwin Metadata Management (EMM) installation directory on the application server and open the file at:

conf\Glossary\GlossaryImportSample.csv

A	B	C	D	E	F	G	H	I	J
1	Type	Parent Category Path	Name	Description	Term Type	Term Data Type	Term Abbreviation	Term Alternate Abbreviation	Documentation
2	Category	/	Sample Category	Sample category defined in the external csv file.					
3	Term	/Sample Category	Sample Term	Term imported with a sample csv.	Business		sCategory		
4	Term	/Sample Category	Sample Term2	Second term imported with a sample csv.	Business		sCategory		
5	Category	/Sample Category	Sample Subcategory	Sample subcategory defined in the csv.					
6	Term	/Sample Category/Sample Subcategory	Sample Term	Sample term created in the sub category					
7									
8	*This CSV file is used to create a new or update existing categories and terms in a Glossary								
9	*Comment line starts with asterisk(*) symbol.								
10									
11	*The following is the list of the standard attributes:								
12									
13	* - Type: possible values: Term, Category.								
14	* - Parent Path: variable length string. Must be present in the glossary or pre-created in the file								
15	* - Name: variable length string. Must be unique in the parent category. Can contain letters, numbers, spaces, dashes and underscores only								
16	* - Description: variable length string.								
17	* - Term Type: possible values: Business, Entity, Attribute, Domain, Possible Value								
18	* - Term Data Type: variable length string.								
19	* - Term Abbreviation: variable length string.								
20	* - Term Alternate Abbreviation: variable length string.								
21	* - Documentation: variable length string.								
22	* - Object ID: serialized object identifier in the format [modelId]#[objectId]. Generated when exporting from Glossary. Not required for importing.								
23	*Custom Attribute Name: glossary can have custom attributes defined. Use the custom attribute name as a column name to specify its values.								
24									
25	* When "Parent Category Path" (or "Object ID") is missing the object is imported into a temporary category under the root to be moved to appropriate category manually. The temporary category name is derived from the import time.								
26									

Figure 4 - Viewing the GlossaryImportSample.csv file in Microsoft Excel

Basically, the idea is to:

- Take the columns in the file exported from erwin Data Modeler and arrange them in the order expected by the erwin Metadata Management (EMM):

Column in new glossary format CSV file	Column in exported CSV file
Type	To be filled in ("Term")
Parent Category Path	To be filled in ("/<category name>")
Name	Column A
Description	Column H
Term Type	To be filled in ("Business")
Term Data Type	No equivalent
Term Abbreviation	Column B
Term Alternate Abbreviation	Column C

## Metadata Management Tutorial – Data Governance Naming Standards with erwin Data Modeler Using erwin Metadata Management (EMM)

- Insert a first row with the names in the GlossayImportSample.csv
- Fill in the Type, Parent Category Path and Term Type columns appropriately
- The business glossary must have a root term, i.e., terms cannot be at the root. Thus, you must add a row just below the column headers to define a category and then specify that category as the Parent Category Path for each term appropriately.

You may of course add additional categories and Parent Category Paths as you wish.

Type	Parent Category Path	Name	Description	Term Type	Term Data Type	Term Abbreviation	Term Alternate Abbreviation
Category	/	Sample Category	Sample category defined in the external csv file.				
Term	/Sample Category	CUSTOMER	First Term imported with a sample csv.	Business		CUST	
Term	/Sample Category	MOVIE RENTAL RECORD	Second Term imported with a sample csv.	Business		MO RENT REC	
Term	/Sample Category	EMPLOYEE	Third Term imported with a sample csv.	Business		EMP	
Term	/Sample Category	SALES ORDER	Fourth Term imported with a sample csv.	Business		SLS ORD	
Term	/Sample Category	movie copy number	Fifth Term imported with a sample csv.	Business		mo co num	

Figure 5 - Resulting glossary spreadsheet ready to load into erwin Metadata Management (EMM)

Now, return to erwin Metadata Management (EMM) and open the new business glossary. Then, click on the **Import** icon, browse for the file and you created click the **Import** button. The result is:

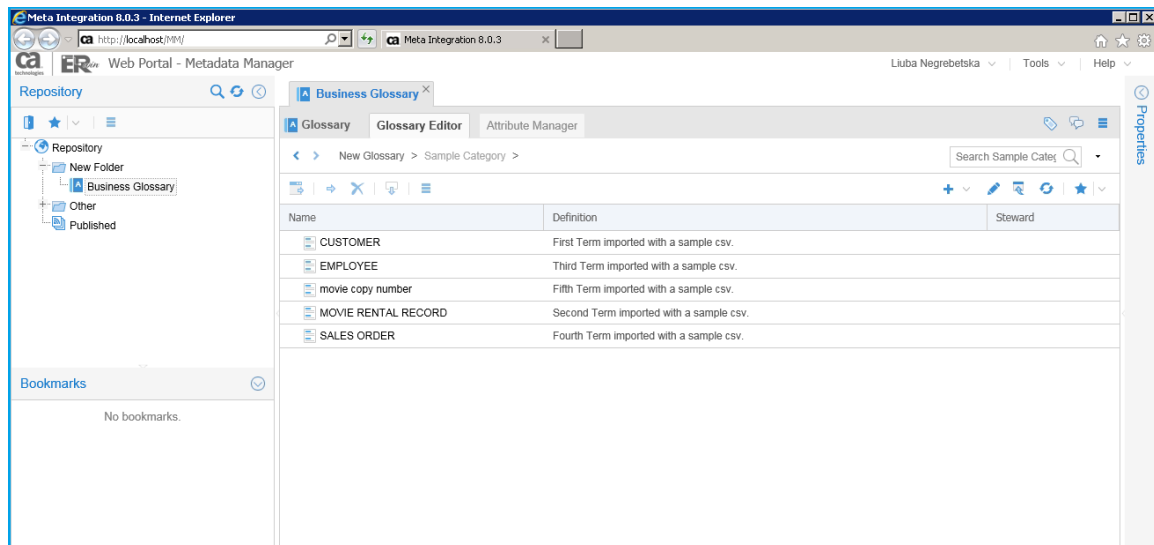


Figure 6 - Resulting business glossary in erwin Metadata Management (EMM)



### 3 Exporting a Business Glossary to erwin Data Modeler Naming Standards

Go to erwin Metadata Management (EMM) and open the new business glossary. Then, click on a category and then either right-click and select [Export to CSV File](#) or click on the Actions icon and select [Export to CSV File](#).

The result is a new CSV file:

	A	B	C	D	E	F	G	H	I	J
1	Type	Parent Category Path	Name	Description	Term Type	Term Data Type	Term Abbreviation	Term Alternate Abbreviation	Documentation	Object Id
2	Category	/	Sample Category							2413#2
3	Term	/Sample Category	CUSTOMER	First Term imported with a sample csv.	Business		CUST			2413#3
4	Term	/Sample Category	MOVIE RENTAL RECORD	Second Term imported with a sample csv.	Business		MO RENT REC			2413#4
5	Term	/Sample Category	EMPLOYEE	Third Term imported with a sample csv.	Business		EMP			2413#5
6	Term	/Sample Category	SALES ORDER	Fourth Term imported with a sample csv.	Business		SLS ORD			2413#6
7	Term	/Sample Category	movie copy number	Fifth Term imported with a sample csv.	Business		mo co num			2413#7
8										

Figure 7 - Resulting exported CSV file from business glossary in erwin Metadata Management (EMM)

Basically, the idea is to:

- Take the columns in the file exported from the erwin Metadata Management (EMM) and arrange them in the order expected by erwin Data Modeler:

Column in new CSV file	Column in exported glossary format CSV file
Column A	Name
Column B	Term Abbreviation
Column C	Term Alternate Abbreviation
Column D	“X”
Columns E, F and G	empty
Column H	Description

- Remove the first row with the column names
- Fill in D, E, F and G columns appropriately
- Remove the row just below the column headers that defined the category from the business glossary.

	A	B	C	D	E	F	G	H
1	CUSTOMER	CUST		x				First Term imported with a sample csv.
2	MOVIE RENTAL RECORD	MO RENT REC		x				Second Term imported with a sample csv.
3	EMPLOYEE	EMP		x				Third Term imported with a sample csv.
4	SALES ORDER	SLS ORD		x				Fourth Term imported with a sample csv.
5	movie copy number	mo co num		x				Fifth Term imported with a sample csv.
6								

Figure 8 - Resulting CSV file ready to load into erwin Data Modeler

Now, open any .erwin model in erwin Data Modeler, and go to Tools ➔ Standards ➔ Naming Standards and click on the Glossary tab. Then, create new Naming Standard for imported model (E.g.: “Naming\_Standard\_Imported”).

## Metadata Management Tutorial – Data Governance Naming Standards with erwin Data Modeler Using erwin Metadata Management (EMM)

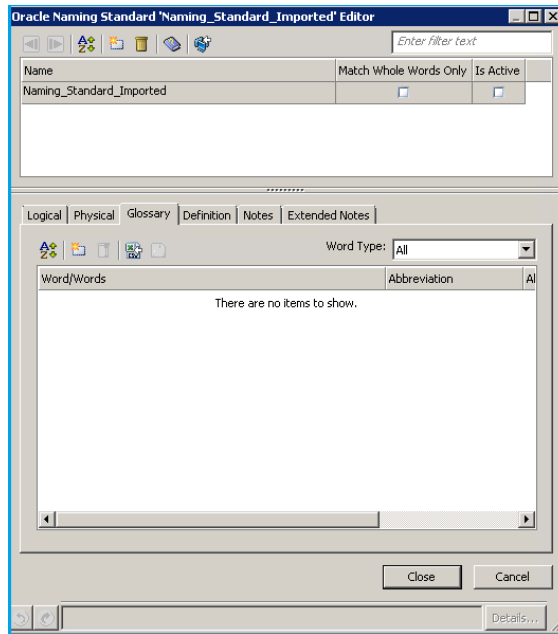


Figure 9 - Glossary tab in Naming Standards Editor dialog

Click on Import from CSV and either merge with existing contents or replace. Browse to the file and click Open.

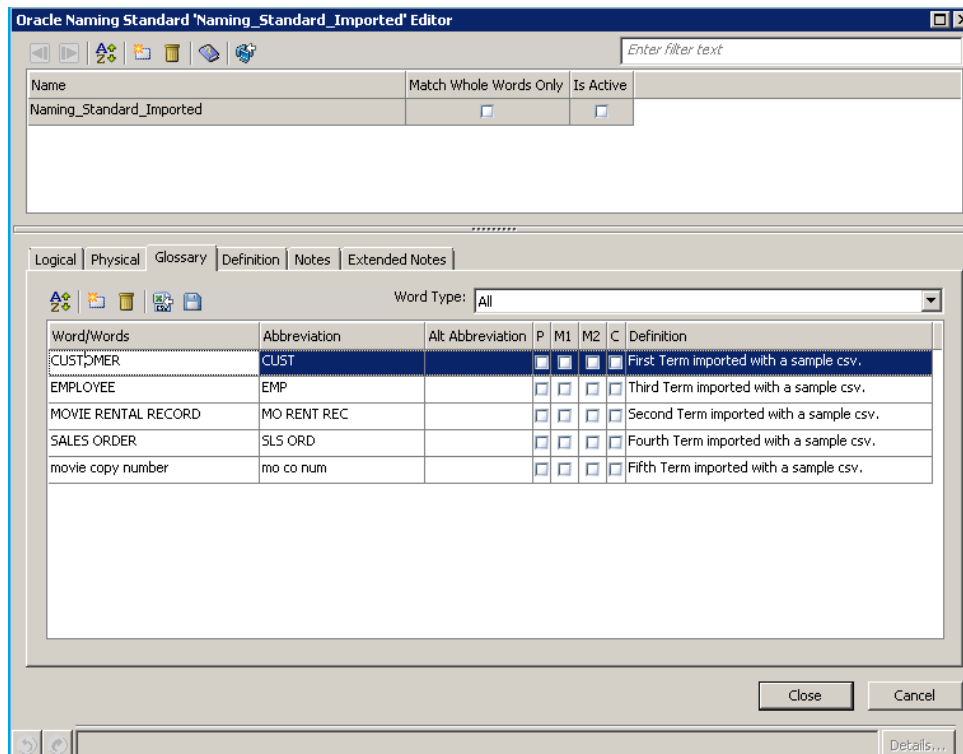


Figure 10 - Resulting glossary tab in erwin Data Modeler.