

erwin<sup>®</sup>  
Data Transformation

erwin DT 9  
User Guide

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# Contents

<b>Contents .....</b>	<b>ii</b>
About this guide.....	6
Document audience .....	6
Document conventions .....	6
<b>Chapter 1 .....</b>	<b>7</b>
<b>1 Tool overview .....</b>	<b>7</b>
<b>2 Licensing .....</b>	<b>9</b>
<b>3 Home page.....</b>	<b>11</b>
1.1.1. File Menu .....	12
1.1.2. Configuration Menu .....	12
1.1.3. Tools Menu .....	13
1.1.4. Help Menu .....	13
<b>Chapter 2.....</b>	<b>14</b>
<b>1 Adapters configuration .....</b>	<b>14</b>
1.1 DB Adapter Configuration .....	14
1.1.1 Add or Modify DB Adapter .....	15
1.1.2 Connection Parameters.....	16
1.1.3 Stored Procedure.....	16
1.1.4 DB Query .....	17
1.1.5 DB Loader .....	18
1.1.6 NoSQL DB Query.....	19
1.1.7 DB Metadata.....	21
1.2 Web Service Adapter Configuration.....	23
1.2.1 Add or Modify SOAP Web Service Adapter .....	24
1.2.2 Test Web Service Parameters.....	29
1.2.3 Add or Modify REST/others Web Service Adapter .....	30
1.2.4 BMC Discovery.....	31
1.2.5 RSA Archer – VIEW REPORT.....	34
1.2.6 RSA Archer – EXECUTE DATA FEED .....	37
1.2.7 ServiceNow – READ TABLES.....	40
1.2.8 ServiceNow – PUSH DATA .....	44
1.2.9 SmartSheet .....	47
1.2.10 SharePoint Online.....	50
1.2.11 Generic data provider - CSV .....	54
1.2.12 Veracode – READ APPLICATION LIST .....	57
1.2.13 Veracode – IMPORT APPLICATION DATA.....	59
1.2.14 Zendesk – Get Tickets.....	62
1.2.15 Zendesk – Create Tickets .....	64
1.2.16 Zendesk – Update Tickets .....	66
1.2.17 CloudHealth – READ PERSPECTIVE GROUPS .....	68

---

1.2.18	CloudHealth – UPDATE PERSPECTIVE .....	72
1.2.19	Business Terms from BGM – Download Business Terms .....	76
1.2.20	Business Terms from BGM – Upload Business Terms.....	80
1.2.21	erwin DISuite Metadata Manager .....	83
1.2.22	erwin DISuite Mapping Manager .....	86
1.3	File Adapter Configuration .....	89
1.3.1	Operation “GET” .....	90
1.3.1.1	NFS Protocol .....	90
1.3.1.2	FTP Protocol .....	91
1.3.2	Operation “PUT” .....	92
1.3.2.1	NFS Protocol .....	93
1.3.2.2	FTP Protocol .....	93
<b>2</b>	<b>Transformation Library Configuration .....</b>	<b>95</b>
<b>Chapter 3</b>	<b>.....</b>	<b>98</b>
<b>1</b>	<b>Model Configuration.....</b>	<b>98</b>
<b>2</b>	<b>Workspace Configuration .....</b>	<b>101</b>
<b>Chapter 4</b>	<b>.....</b>	<b>104</b>
<b>1</b>	<b>WorkFlow Configuration.....</b>	<b>104</b>
1.1	Data Source .....	106
1.1.1	File Adapter .....	106
1.1.2	DB Adapter .....	108
1.1.3	WS Adapter .....	108
1.1.4	EA Adapter (formerly CM Adapter).....	109
1.1.5	EA Agile Adapter .....	111
1.1.6	EA Agile V3 Adapter .....	113
1.2	Transformation .....	116
1.2.1	Data Cleansing.....	116
1.2.1.1	Data Type Check .....	116
1.2.1.2	Not Allowed Text Check .....	117
1.2.1.3	Normalize Blank Spaces .....	117
1.2.2	Data Formatting.....	117
1.2.2.1	Format Date .....	117
1.2.2.2	Format Number .....	118
1.2.2.3	Capital/Small letter .....	118
1.2.2.4	Suffix/Prefix.....	118
1.2.2.5	Replace Text .....	118
1.2.2.6	Replace Value on Condition .....	119
1.2.2.7	Rename and Order Columns .....	119
1.2.2.8	Selected Value in List .....	119
1.2.2.9	Multiple Rows Values to Multiline Cell .....	120

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1.2.2.10	Multiline Cell to Multiple Rows .....	120
1.2.2.11	Group data from datasets .....	120
1.2.2.12	Sort Data by Columns.....	121
1.2.2.13	Compare and Replace .....	122
1.2.3	Data Structure Changing .....	122
1.2.3.1	Combine Field.....	122
1.2.3.2	Split Field.....	122
1.2.3.3	Add Fixed value field.....	123
1.2.3.4	Copy Column .....	123
1.2.3.5	Drop Column .....	123
1.2.4	Data Filtering .....	124
1.2.4.1	Fixed value manager .....	124
1.2.4.2	Interval value manager .....	124
1.2.4.3	Distinct values.....	124
1.2.4.4	Not All Null values.....	125
1.2.4.5	In/Not In Dataset .....	125
1.2.5	Data Derivation.....	125
1.2.5.1	Match Keys and Pick Values .....	125
1.2.5.2	Count Items In Column.....	126
1.2.5.3	Count Items In Rows .....	126
1.2.5.4	Sum Values In Rows .....	126
1.2.5.5	Sum Values In Columns.....	127
1.2.5.6	Divide Values In Two Columns.....	127
1.2.5.7	Two Levels Aggregation .....	127
1.2.6	Custom Transformation .....	128
1.3	Operation .....	130
1.3.1	Load in CM Repository .....	130
1.3.2	Delete in CM Repository.....	136
1.3.3	Synch in CM Repository.....	136
1.3.4	POST to EA Agile .....	138
1.3.5	Delete in EA Agile.....	141
1.3.6	POST to EA Agile V3 .....	142
1.3.7	Delete in EA Agile V3.....	146
1.3.8	Send to File Adapter.....	146
1.3.9	Send to DB Loader .....	146
1.3.10	Web Service POST .....	147
1.3.7	Evolve Site Import.....	148
1.3.11	Email Configurations.....	151
<b>2</b>	<b>Workflow Test .....</b>	<b>154</b>
<b>Chapter 5</b>	<b>.....</b>	<b>156</b>

<b>1</b>	<b>Administrator Tools .....</b>	<b>156</b>
1.1	Execute and Schedule Jobs.....	156
1.1.1	Job Scheduler.....	157
1.1.2	Active Configurations.....	159
1.1.3	Define Jobs Sequences.....	160
1.1.4	Multi Source Jobs.....	162
1.1.5	Custom jobs.....	163
<b>Chapter 6 .....</b>		<b>166</b>
<b>1</b>	<b>Running DT on Event .....</b>	<b>166</b>
1.1	Running an Adapter on Event.....	166
1.1.1	Running a DB Adapter on Event with Parameters .....	167
1.2	Running a Sequence on event .....	169
<b>Chapter 7 .....</b>		<b>171</b>
<b>1</b>	<b>Running DT from Cloud Platform .....</b>	<b>171</b>
<b>Chapter 8 .....</b>		<b>177</b>
<b>1</b>	<b>Log Viewer .....</b>	<b>177</b>
1.1	Client, Scheduler and Workflow log.....	178
<b>Chapter 9 .....</b>		<b>179</b>
<b>1</b>	<b>Utilities .....</b>	<b>179</b>
1.1	Reset Workflows/Sequences.....	179
1.2	Reset Logs/Files .....	180
1.3	Backup DB.....	181
1.4	Export/Import Workflow .....	181
1.5	Request for Help .....	184
1.6	Cloud Environment .....	185
1.7	Reset Cloud Requests.....	186
<b>Chapter 10 .....</b>		<b>187</b>
<b>1</b>	<b>Users, Roles and Security.....</b>	<b>187</b>
<b>Chapter 11 .....</b>		<b>189</b>
<b>1</b>	<b>Troubleshooting Information.....</b>	<b>189</b>
1.1	Installation Path.....	189
1.2	Data Path.....	189
1.3	Setup / Windows Services .....	191
1.4	Adapter Folders .....	191
1.5	Model Configuration Folder .....	191
1.6	Workflow Folder .....	192
1.7	Operation Folder.....	192
<b>Chapter 12 .....</b>		<b>194</b>
<b>1</b>	<b>Examples of Workflow Configurations.....</b>	<b>194</b>
1.1	Loading data from external sources into a model .....	194
1.2	Align External DB with Model Contents .....	203
1.3	Align Federated Models .....	210
1.4	Deriving values and update consistency data.....	214

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## About this guide

This guide explains how to configure and use the tool erwin Data Transformation, describing the various features and functionality available to the user.

It is recommended that you print this guide so that you can follow the instructions more easily. The guide is designed to be printed double-sided in booklet form.

## Document audience

The User Guide is intended to be read by end users who are concerned with getting the most benefit from the erwin Data Transformation implementation.

## Document conventions

**DT** erwin Data Transformation

**CM** CW Suite Desktop Modeling Suite (aka Corporate Modeler Suite)

**CE** erwin CW Exchange (aka Corporate Exchange)

**Evolve** erwin EA Web Platform

**WF** Workflow

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# Chapter 1

## 1 Tool overview

DT is aimed at configuring multiple, dynamic data flows, and managing those flows without relying on programming resources, with an easy to use interface to organize them in logically consistent job sequences, to be run on schedule/on demand:

- Extract and transform raw data *from third party tools* in order to create and update data into erwin CW Exchange repository or into erwin EA Agile workspaces
- Extract data *from erwin CW Exchange repository or from erwin EA Agile workspaces* in order to update third party tools.
- Configure operation to *run on a schedule*: after the initial configuration and test, the data flows can run automatically with no need for the user to intervene.

From now on, “*model*” refers to data logically organized either into CW Exchange repository or into erwin EA Agile workspaces.

DT can therefore be classified as a tool that enables users to:

- *Maintain model data aligned with external sources*
  - Get raw data from external data source via adapters
  - Transform data using XLST Transformation library
  - Map data to the model objects and load into the model
- *Export and publish model data*
  - Unload data from the model, using custom filters
  - Transform data using XLST Transformation library
  - Upload external databases, post data to cloud systems or send files to external folder data to destination

- 
- *Manage operations*
    - Back up data
    - Schedule the data flows to be executed
    - Review audit logs
    - Configure email notification alerts

DT offers a number of ready-to-use standard adapters that cover a wide number of integration needs. This enables the application of a standard approach to integration requirements.

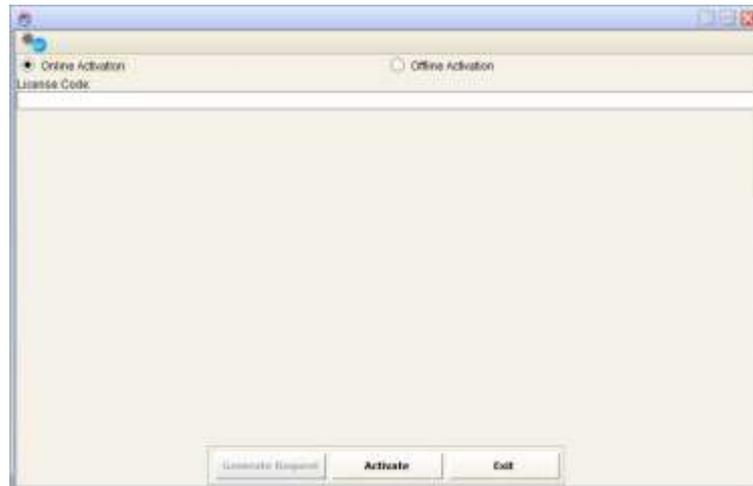
To ensure safe data operations, all updating activities are performed using standard APIs, and are preceded by data mapping and consistency checks. A user operation log, e-mail notification, scheduled operation log and system log are also provided (sever errors are notified via e-mail to system administrator).

DT stores all the necessary settings (environment parameters, access control and profiling, job scheduling, workflows, adapter parameters and rules for file handling) in an embedded database (users do not need to interact with this database directly, a tool administrator may do).

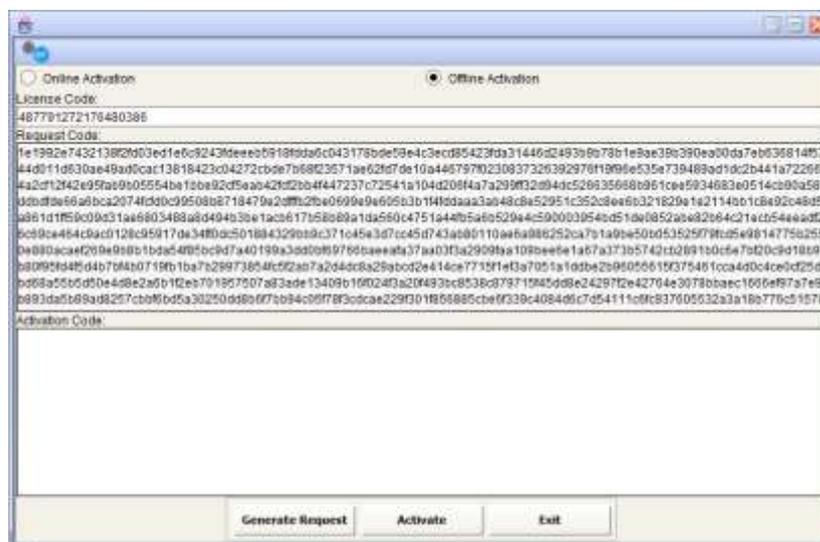
User may interact with the tool during workflow testing activities, checking data previews and if necessary, discarding the updates.

## 2 Licensing

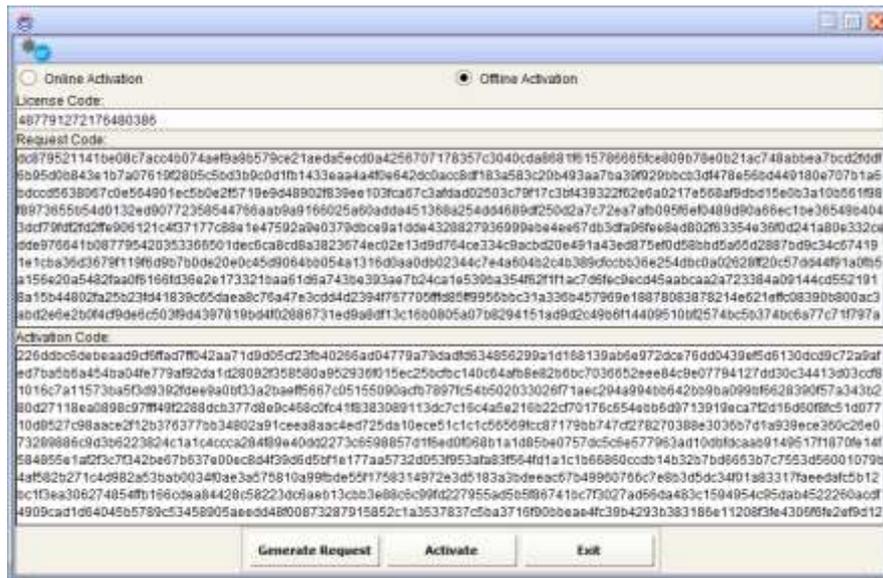
If no valid license is found on the system, the user is required to provide a license key when DT starts.



For offline licensing, a request code must be generated. This window should not be closed until the product activation is complete, as a new request would otherwise need to be generated.



This code should be sent to erwin support, who will in turn provide an activation code specific to the request. This code should be used to activate the product. The activation code used must be specific to the request code provided to support; generating a new request code would necessitate a new activation code.



### 3 Home page

The home page allows the user to select the operation by clicking on the buttons or selecting from the menu at the top of the window.



Operations are logically divided into 2 groups:

- *Setting adapters:*



- *Define model (or workspace) configuration, workflow (data flows) configuration and schedule of the jobs/job sequences.*

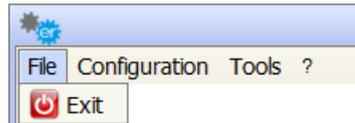


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The same operations are available from the menu bar, as explained in following paragraphs.

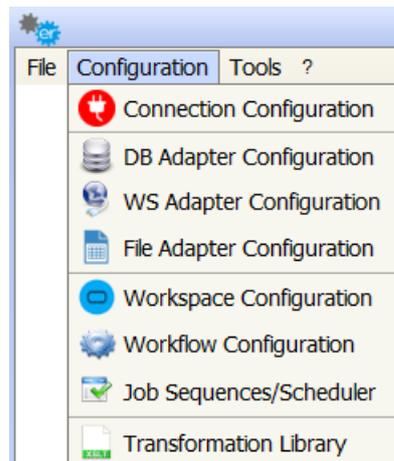
### 1.1.1. File Menu

This menu is used to close the application.



### 1.1.2. Configuration Menu

This menu provides access to add/delete/modify the settings for the following operations:

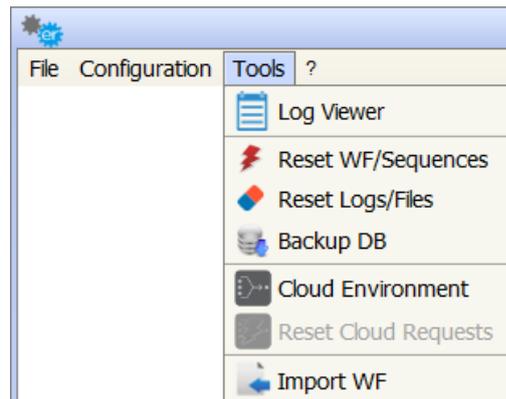


- Connection Configuration
- Adapter Configuration (DB, WebService or File Adapter)
- Model/Workspace Configuration
- Workflow Configuration
- Job Sequences/Scheduler
- Transformation Library

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### 1.1.3. Tools Menu

This menu provides access to the application log viewer. Additionally the user can reset sequences that are running, reset logs, delete workflow files, backup CC database and import workflow from the CC workflow export file – (see [Chapter 9 - Utilities](#))

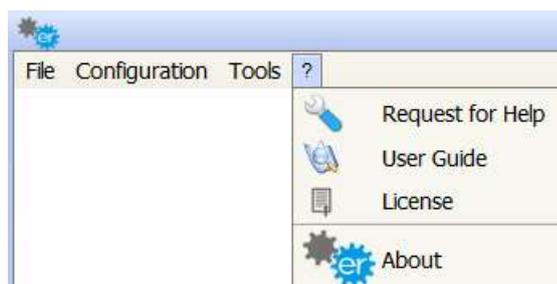


“Cloud Environment” and “Reset Cloud Requests” items refer to external environment configuration and operations – See [“Chapter 7 - Running DT from Cloud Platform”](#)

### 1.1.4. Help Menu

This menu provides information and tools:

- Request for Help on a given workflow – (see [Chapter 9 - Utilities](#))
- DT User Guide (PDF)
- License
- About, DT version, build and type of license



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# Chapter 2

## 1 Adapters configuration

Adapters are tools used by DT to “GET” data from the external world (databases, web services, folders and files) or to “PUT”, or send data to the destination. “GET” adapters can be used as a data source when configuring a workflow; “PUT” adapters can be used as a workflow operation target (see later). Any time a “GET” adapter is created, a job is also created, in order to be scheduled and produce its dataset (triggering all the workflows which use that dataset as source). A “PUT” adapter cannot be scheduled, as its execution is triggered by the execution of workflows using it as target.

### 1.1 DB Adapter Configuration

Going through this configuration window, the user can set up an adapter to be used as data source or operation target in a workflow. It's possible to:

- Execute a **query** on a specified relational database to use the result set as data source in a workflow
- Execute a **stored procedure** with the proper parameters to use the output file as a data source in a workflow
- Configure a **DB loader** to be used as the operation target in a workflow
- Execute a **query** on a MongoDB database to use the result set as data source in a workflow

The first group of fields in the window is the DB Adapter List, which lists all the DB Adapters available. The second group is the General Parameters, which include the Name, Description, Type and DB Adapter folder; all these fields are mandatory.

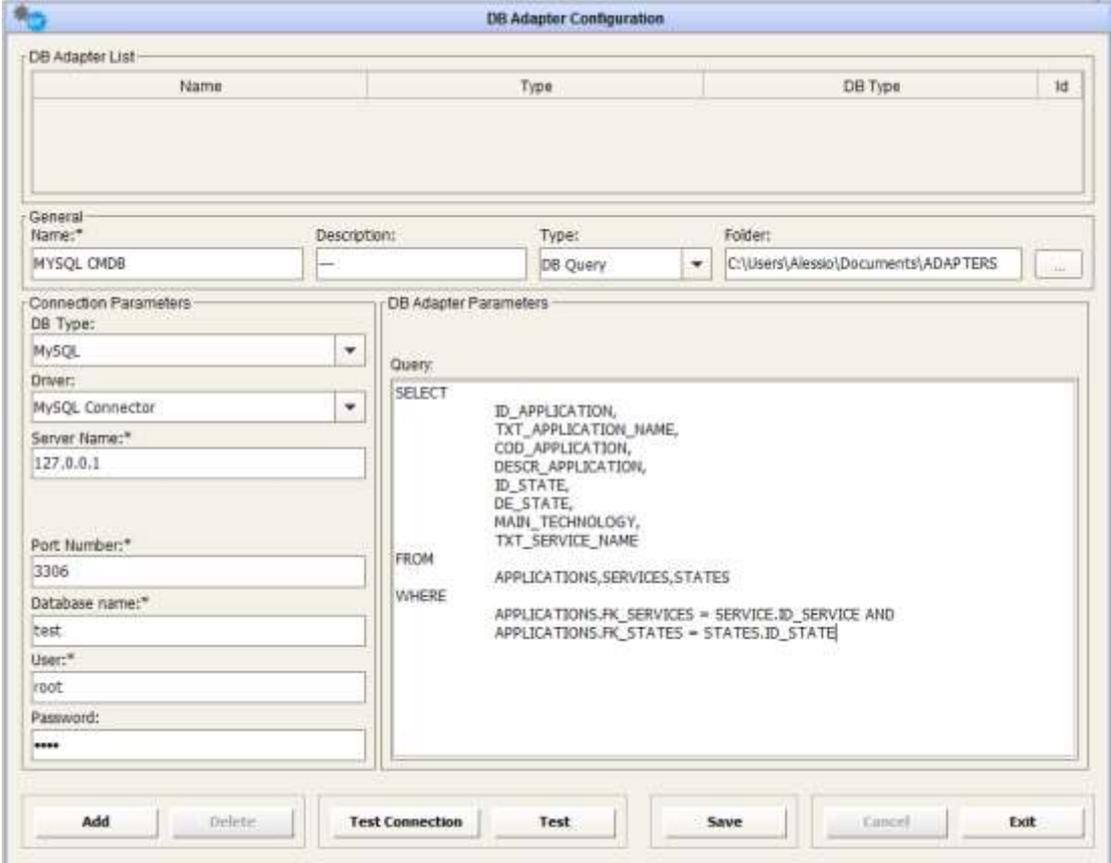
The third group is the Connection Parameters, which includes all the parameters needed to connect to the Data Base and finally the last group is the DB Adapter Parameters, which describes the query or the Stored Procedure and its parameters.

### 1.1.1 Add or Modify DB Adapter

To create a new DB Adapter just press the  button and start editing the new adapter parameters.

Alternatively modify an existing adapter, simply selecting from the list – the parameters are always in edit mode.

The name, description, type and folder (used to save intermediate and result files for adapter execution) of the DB adapter are the first fields to enter in the form; then for any type of DB Adapter the user must provide connection parameters and adapter details as described below.



The screenshot shows the 'DB Adapter Configuration' dialog box. It is divided into several sections:

- DB Adapter List:** A table with columns 'Name', 'Type', 'DB Type', and 'Id'. It is currently empty.
- General:** Fields for 'Name:' (MYSQL OMDB), 'Description:' (-), 'Type:' (DB Query), and 'Folder:' (C:\Users\Alessio\Documents\ADAPTERS).
- Connection Parameters:** Fields for 'DB Type:' (MySQL), 'Driver:' (MySQL Connector), 'Server Name:\*' (127.0.0.1), 'Port Number:\*' (3306), 'Database name:\*' (test), 'User:\*' (root), and 'Password:' (\*\*\*\*).
- DB Adapter Parameters:** A 'Query:' field containing a SQL query:

```
SELECT
  ID_APPLICATION,
  TXT_APPLICATION_NAME,
  COD_APPLICATION,
  DESCR_APPLICATION,
  ID_STATE,
  DE_STATE,
  MAIN_TECHNOLOGY,
  TXT_SERVICE_NAME
FROM
  APPLICATIONS,SERVICES,STATES
WHERE
  APPLICATIONS.FK_SERVICES = SERVICE.ID_SERVICE AND
  APPLICATIONS.FK_STATES = STATES.ID_STATE
```

At the bottom of the dialog are buttons for 'Add', 'Delete', 'Test Connection', 'Test', 'Save', 'Cancel', and 'Exit'.

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## 1.1.2 Connection Parameters

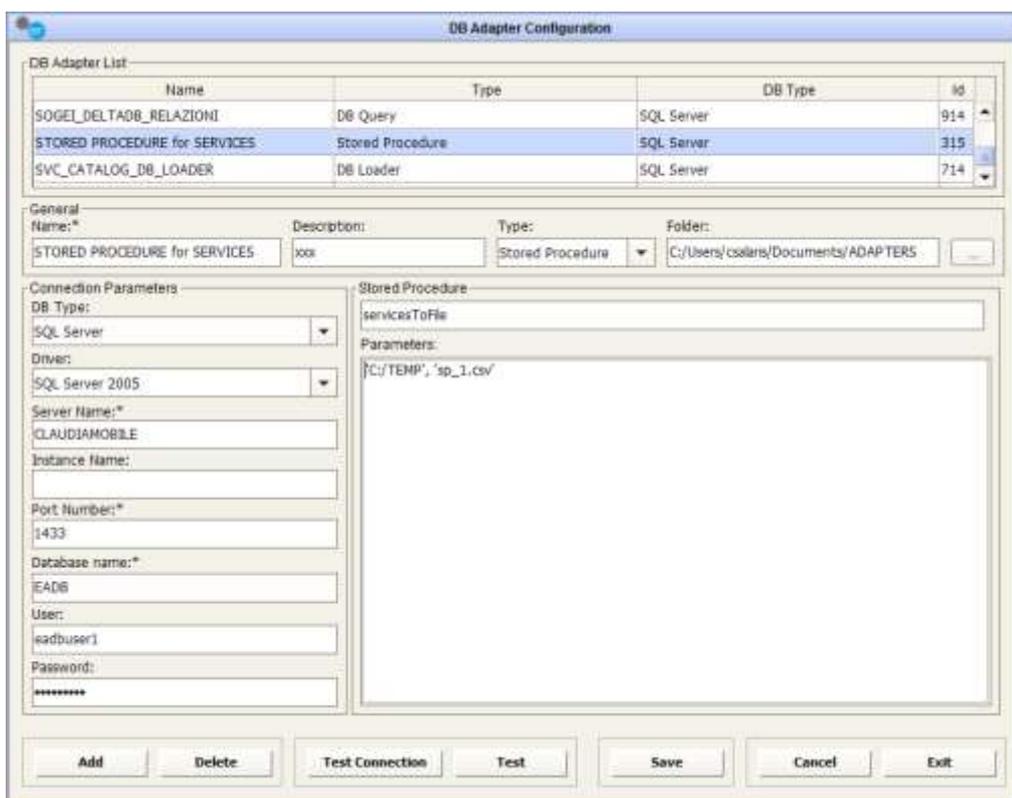
In the Connection Parameters pane the user has to provide all the parameters needed to set up the connection with the database. In order to check if a connection can run correctly, press the **Test Connection** button.

Then, depending on what has been selected in the drop-down list named Type (Stored Procedure, DB Query, DB Loader and NoSQL DB Query) the DB Adapter Parameters section shows the following.

## 1.1.3 Stored Procedure

When the field “Type” is set to “Stored Procedure”, then two other fields are highlighted:

- The field “Stored Procedure name” that has to be filled with the stored procedure name
- The field “Parameters” that has to be filled with the list of all the parameters separated by commas and optionally enclosed by quote (e.g. the same way the stored procedure could be called from outside DT, like a DB Client).

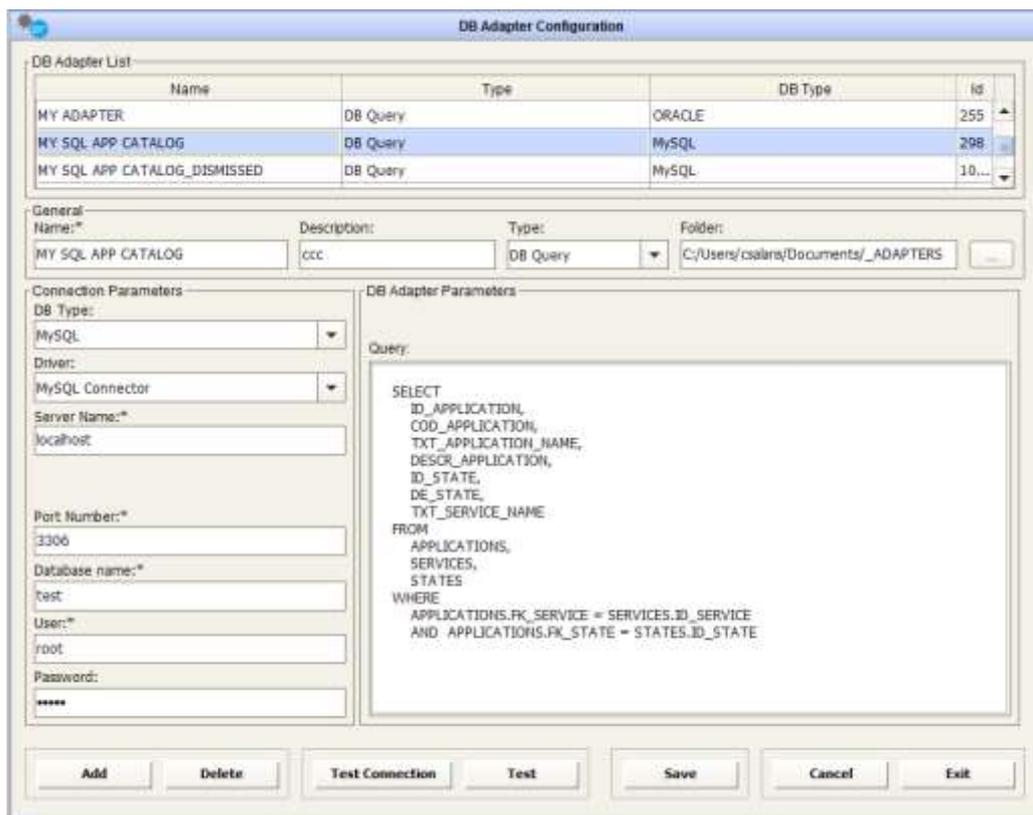


To be used as data source adapter in DT, stored procedures must produce a CSV file containing a data set; this means that at least two parameters are required (folder as the first parameter and file name as second), so that DT knows and accesses the resulting dataset.

For example, if an external database contains a stored procedure named “servicesToFile”, which accepts two parameters “folder” and “filename”, then the parameters text area must be filled with the folder path enclosed by quotes.

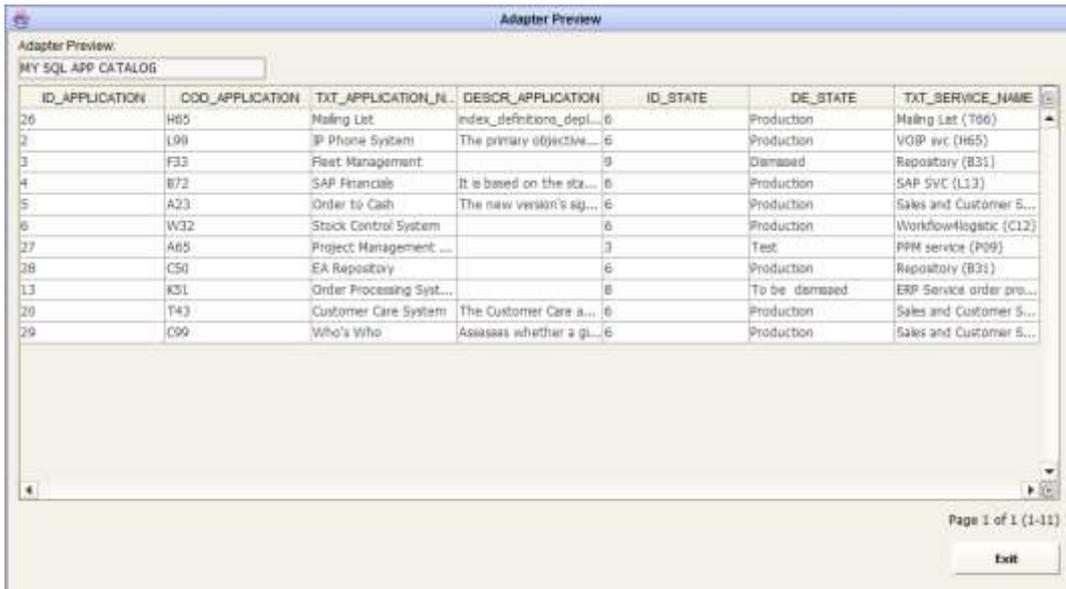
### 1.1.4 DB Query

When the field “Type” is set to “DB Query”, then the “Query” field is highlighted. In this field, the user has to write the query to be run by the Database.



In order to check if the previous DB query is written correctly, press the **Test** button. This opens a new window that contains the result set obtained from running the adapter.

The result set is paginated in groups of 50 records. Use the side window arrows to go up and down the list.



The screenshot shows a window titled "Adapter Preview" with a search bar containing "MY SQL APP CATALOG". Below the search bar is a table with the following columns: ID\_APPLICATION, ODD\_APPLICATION, TXT\_APPLICATION\_N, DESCR\_APPLICATION, ID\_STATE, DE\_STATE, and TXT\_SERVICE\_NAME. The table contains 11 rows of data. At the bottom right of the window, it says "Page 1 of 1 (1-11)" and there is an "Exit" button.

ID_APPLICATION	ODD_APPLICATION	TXT_APPLICATION_N	DESCR_APPLICATION	ID_STATE	DE_STATE	TXT_SERVICE_NAME
26	H65	Mailing List	index_definitions_depl...	6	Production	Mailing List (T06)
2	L98	IP Phone System	The primary objective...	6	Production	VOIP svc (H65)
3	F33	Fleet Management		9	Damaged	Repository (B31)
4	B72	SAP Financials	It is based on the sta...	6	Production	SAP SVC (L13)
5	A23	Order to Cash	The new version's sq...	6	Production	Sales and Customer S...
6	W32	Stock Control System		6	Production	WorkflowFlagatic (C12)
27	A65	Project Management ...		3	Test	PPM service (P09)
28	C50	EA Repository		6	Production	Repository (B31)
13	K51	Order Processing Syst...		8	To be demased	ERP Service order pre...
20	T43	Customer Care System	The Customer Care a...	6	Production	Sales and Customer S...
29	C99	Who's Who	Assesses whether a gl...	6	Production	Sales and Customer S...

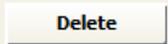
### 1.1.5 DB Loader

When the field "Type" is set to "DB Loader", then the entire DB Adapter Parameters section is disabled. All the mapping parameters between source and target data structure, needed to upload a table in the externals database, will be provided in the workflow operation configuration (see later).

For every type, to save the new DB Adapter just created, press the **Save** button. The adapter will be saved and added to the DB Adapter List at the top of the window. Only if the Test Connection (and query execution, for that type) have valid results, the DB Adapter will be saved.

To cancel the adapter data just entered and to reset the window, press the **Cancel** button.

---

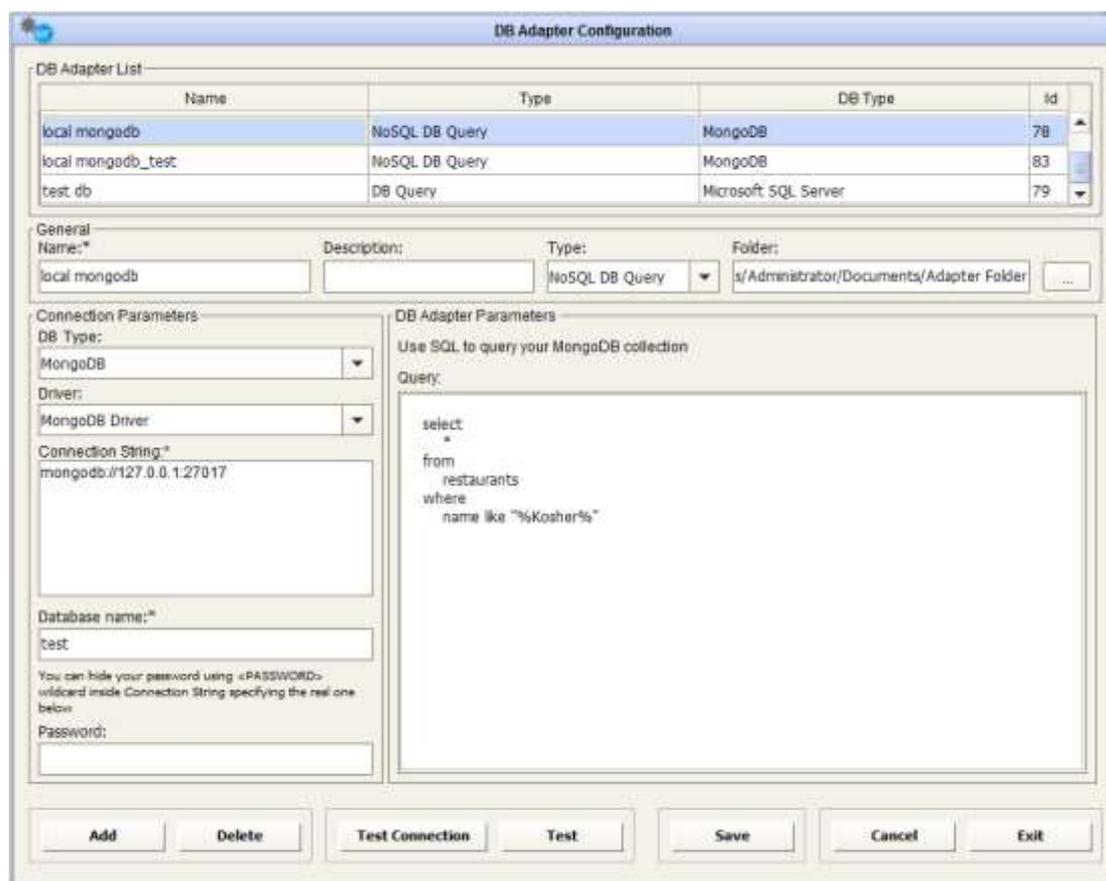
To delete an existing adapter, just select it and press the  button. It will be permanently removed from the DB Adapter List. Please note, all the items linked to the deleted DB adapter (job and workflows that use it as source) are also removed.

The  button closes the window.

### 1.1.6 NoSQL DB Query

When the field “Type” is set to “NoSQL DB Query”, then the “Query” field is highlighted. In this field, the user has to write the query to be run by the MongoDB Database and MongoDB item is selected in the “DB Type” dropdown list. The query must be written using SQL syntax; examples of supported SQL functions are:

- *select object.key1, object2.key3, object1.key4 from my\_collection where object.key2 = 34 AND object2.key4 > 5*
- *select \* from my\_table where date(column,'YYY-MM-DD') >= '2016-12-12'*
- *select \* from my\_table where date(column,'natural') >= '5000 days ago'*
- *select \* from my\_table where regexMatch(column,'^[ae"gf]+\$') = true*
- *select distinct column1 from my\_table where value IS NULL*
- *select \* from my\_table where value LIKE 'start%'*
- *select column1 from my\_table where value IN ("theValue1","theValue2","theValue3")*
- *select column1 from my\_table where value NOT IN ("theValue1","theValue2","theValue3")*
- *select column1 from my\_table where column = true*
- *select borough, cuisine, count(\*) from my\_collection WHERE borough LIKE 'Queens%' GROUP BY borough, cuisine ORDER BY count(\*) DESC;*
- *delete from my\_table where value IN ("theValue1","theValue2","theValue3")*



In the Connection Parameters, user is asked for: Connection String, Database name and Password. For local connection, Connection string is usually *mongodb://127.0.0.1:27017*, while for cloud connections, Connection String can be automatically retrieved from the Connect button inside MongoDB web console. Connection String samples are:

```
mongodb://myusername:<PASSWORD>@cluster0-shard-00-00-
pncrc.mongodb.net:27017,cluster0-shard-00-01-
pncrc.mongodb.net:27017,cluster0-shard-00-02-
pncrc.mongodb.net:27017/admin?replicaSet=Cluster0-shard-
0&ssl=true
```

and

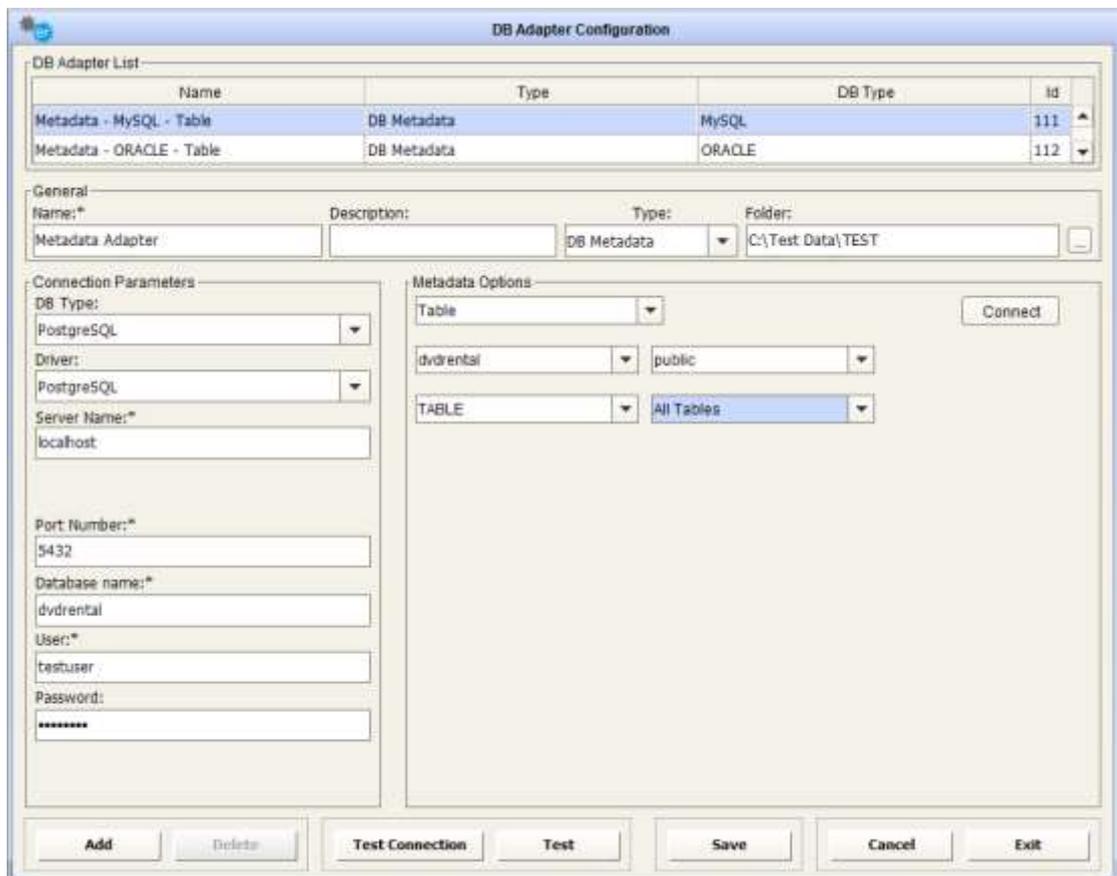
```
mongodb+srv://myusername:<PASSWORD>@cluster0-
pncrc.mongodb.net/test
```

The user can replace <PASSWORD> wildcard with the real one or can keep <PASSWORD> wildcard in the Connection string and provide the encrypted password in the “Password” field.

### 1.1.7 DB Metadata

Setting the “Type” field to “DB Metadata” allows metadata to be retrieved from an SQL databases.

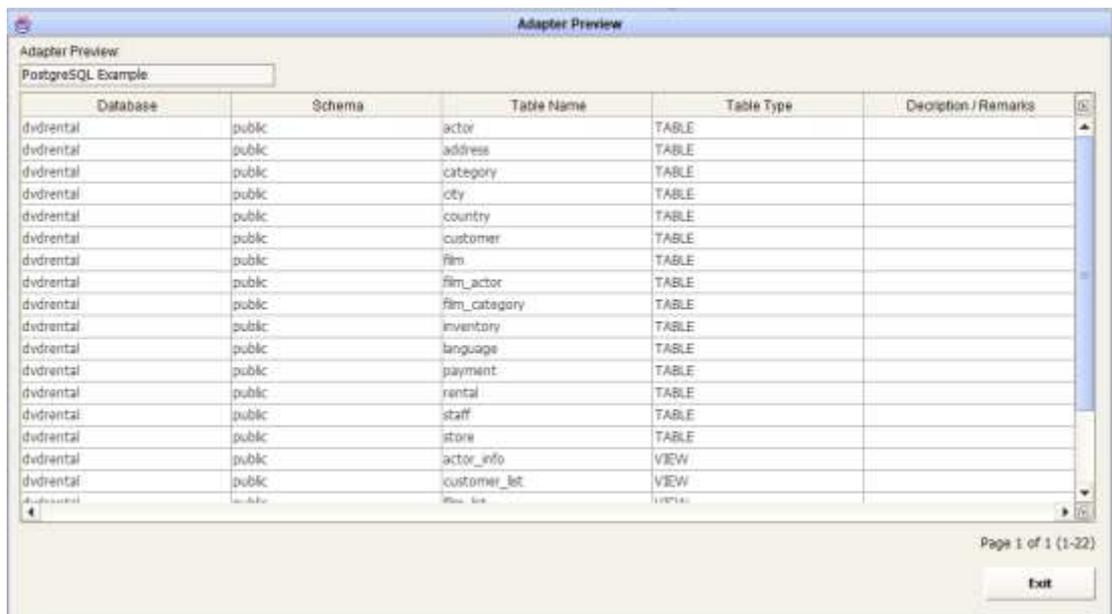
If the “Connection Parameters” are valid, clicking the  button will result in options being displayed for filtering the results by catalog name, schema, table name, and/or table type, as appropriate to the database type and requested metadata type.



If the a connection cannot be established, clicking the  button will result in a “Connection Refused” message being displayed.



The first 50 results can be previewed by pressing the  button.



Database	Schema	Table Name	Table Type	Description / Remarks
dvdrental	public	actor	TABLE	
dvdrental	public	address	TABLE	
dvdrental	public	category	TABLE	
dvdrental	public	city	TABLE	
dvdrental	public	country	TABLE	
dvdrental	public	customer	TABLE	
dvdrental	public	film	TABLE	
dvdrental	public	film_actor	TABLE	
dvdrental	public	film_category	TABLE	
dvdrental	public	inventory	TABLE	
dvdrental	public	language	TABLE	
dvdrental	public	payment	TABLE	
dvdrental	public	rental	TABLE	
dvdrental	public	staff	TABLE	
dvdrental	public	store	TABLE	
dvdrental	public	actor_info	VIEW	
dvdrental	public	customer_list	VIEW	

Page 1 of 1 (1-22)

## 1.2 Web Service Adapter Configuration

Going through this configuration window, the user can set up an adapter to execute a connection with a known Web Service.

The screenshot shows the 'Web Service Adapter' configuration window. It is divided into three main sections:

- Web Service Adapter List:** A table listing available adapters. The selected adapter is 'My Smartheet Adapter for Projects'.
- Web Service Adapter Parameters:** A form where the selected adapter's details are populated, including Name, Description, Adapter Folder, Web Service URL, and Operation.
- Input Parameters Table:** A table showing the expected input parameters for the adapter.

Name	Description	Id
BMC ADDM - Hosts	sd	1137
Global Weather	dfsd	616
My RSA Risk Report	dasd	1138
<b>My Smartheet Adapter for Projects</b>	<b>sadfasf</b>	<b>679</b>

Name:	My Smartheet Adapter for Projects
Description:	sadfasf
Adapter Folder:	C:/Users/csalaris/Documents/ADAPTERS
Web Service URL:	https://app.smartsheet.com/b/home
Operation:	READ_SHEETS

Name	Value	Multi Value	List
Sheet name	My Smartsheet Integ...	NO	NO

Buttons: Add, Modify, Delete, Exit

The first group of fields in the window relate to the Web Services Adapter List, which lists all the available adapters. For each adapter selected in the list, the Web Services Adapter Parameters fill the second group of fields, which describe the Web Service connection parameters and the third group of fields show the expected input parameters for the execution of the adapter.

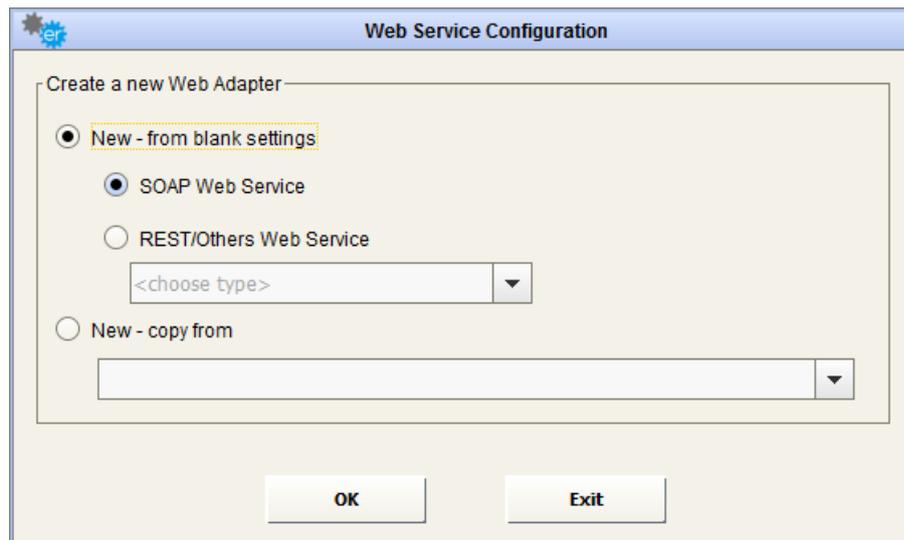
When adding a new one, it's possible to choose between:

- **SOAP** Web Service

- 
- **REST/others** specific adapters, from supported third party systems

### 1.2.1 Add or Modify SOAP Web Service Adapter

To create a new adapter just press the , and select “SOAP Web Service” in the following popup:



To modify an existing adapter selected from the list, press the . An editing window pops up.

The same pop up window applies in both cases. The fields will be empty if the user is creating a new adapter. The same fields will contain data, if the user is going to modify an already existing adapter.

The first group of fields concern the WSDL Parameters while the second group allows the user to specify login parameters, if required.

The first field contains the URL of the WSDL file that should apply for the Web Service. The side button  of the first field allows navigating into the file system and selecting the WSDL file from a local path.

---

Should the Web Service require a login (username and password) to the WSDL server, a flag in the checkbox  Login required will enable the related fields allowing entry of the credentials. Please note that this authentication only applies to the WSDL server and not to the web service operation – operation authentication is not supported at the moment.

The screenshot shows a 'Web Service Configuration' dialog box. It features a 'WSDL' section with a 'WSDL URL:' field containing 'http://www.webservices.net/usweather.asmx?WSDL' and a browse button. Below the URL field is the instruction 'Select the WSDL file from a local path or from a URL'. Further down are 'User:' and 'Password:' fields, and a 'Login required' checkbox. At the bottom of the dialog are three buttons: '< Previous', 'Next >', and 'Exit'. The 'Next >' button is highlighted with a dashed border.

The  button steps into the next window that shows all the available operations of that Web Service.

The screenshot shows a 'Web Service Configuration' dialog box. It has a title bar with a gear icon and the text 'Web Service Configuration'. The main area is divided into sections. The first section is 'Operation', which contains a drop-down menu with 'GetWeatherReport' selected. Below this is the 'Adapter Name:' section with a text box containing 'WS Adapter'. The 'Description:' section has a larger text box containing 'WS Adapter description'. The 'Adapter Folder:' section has a text box containing 'C:\Users\Alessio\Documents' and a 'Browse' button. At the bottom of the dialog, there are three buttons: '< Previous', 'Next >', and 'Exit'.

The first field of the window is a drop-down list that contains a list of the operations available for the selected Web Service.

After selecting the desired operation it is required to enter a name and a description for the adapter in the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to choose the values for the Web Service parameters.

If the Web Services has no parameters the user can leave the fields empty in the following wizard window.

Type	Attribute Name	Attribute Value	isList
class java.lang.String	ZipCode		false

Name: **ZipCode**  Multi value with newline separator

Value(s):

00144

Enter

Modeler Objects

< Previous Test Save

Exit

The first field shows the list of the Web Service parameters, as read from the WSDL:

- Type of parameter (Type),
- Attribute Name (Class Name),
- Attribute Value (Value),
- Capability to accept list of values, as defined in WSDL (isList)

For each of the shown parameters, a value can be entered into the multiline text field, while the parameter is selected in the list above.

The  button sets the entered data.

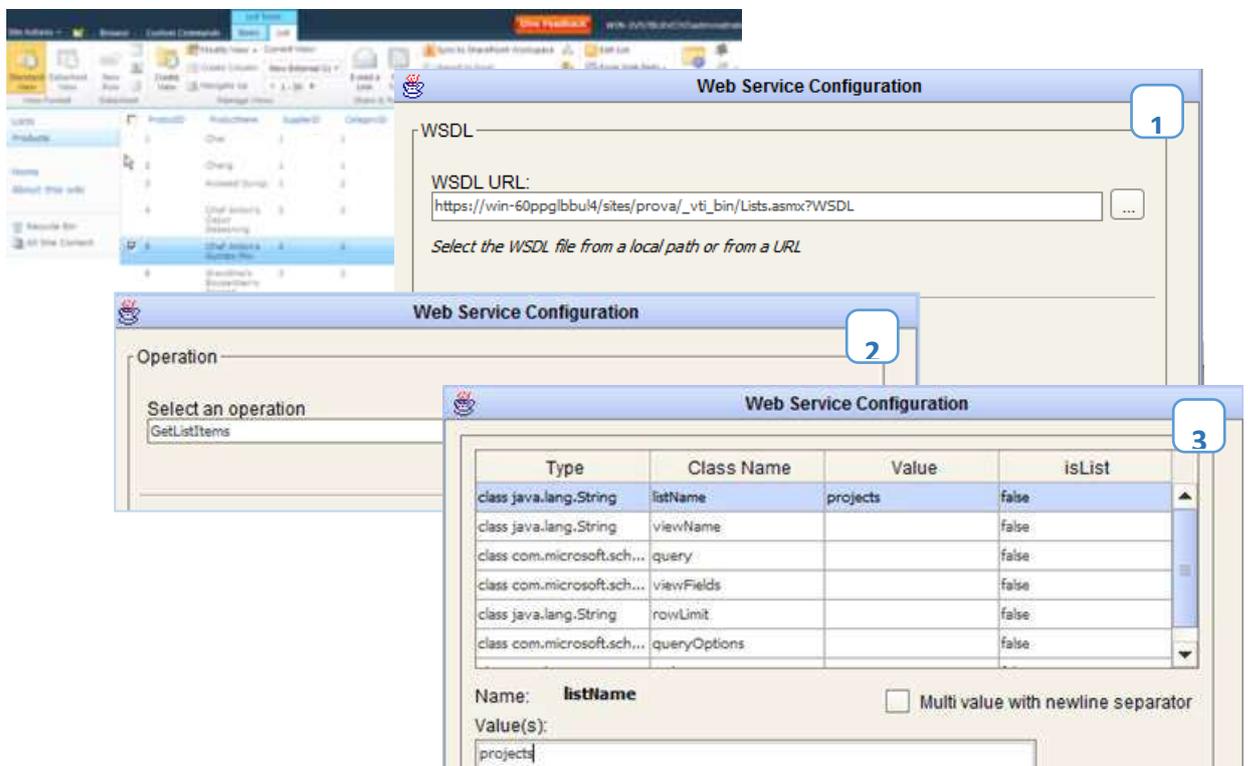
If a parameter is actually a list of values (column “isList” is true), then the user is required to optionally enter different values, separated by a new line (one per row). In this case, DT will call the Web Service only once, passing to it the multi-line string, containing the different values.

If a parameter natively does not allow a list of values (column “isList” is false), but the user needs to pass more than one value to the Web Service call, selecting the option  Multi value with newline separator, the user is allowed to enter a list of values for the selected parameter, even if “isList” is false, with the new line as a separator.

DT will then perform all the implied calls (as many times as the number of desired values in the list) to the Web Service at the scheduled time, by scheduling just one job.

Pressing the  button will save all the changes made in the window.

One common application may be extracting information from **MS SharePoint Lists, for on premise deployments**. In this case, the user could configure a web service adapter to read GetListItems operation from the Lists web service, specifying as a parameter the name of the list to get data from.



After configuring the adapter, users can use it in any workflow as a source, applying for source normalization the provided parser *GetListItemResponseParser* (which may be customized in terms of extracted properties, if needed), so that the list content can be used in an end to end operation.

ID	Title	Manager	Created	Criticality	Description	End Date	Resources
1	Incident Management Optimization	Mr. Scott	2016-01-08 17:49:51	High	This project covers the incident level 1 management only. Objectives: - Guarantee a better incident record by the Call Center - Ensure the tracking between the creation, the management and the closing of the incident	2016-04-22 00:00:00	10
2	Unloading Process Optimization & Compliance	Mrs. Ross	2016-01-08 17:53:13	Low	The Unloading Process Optimization & Compliance project aims at applying some changes on the Unloading Process in order to: - Reduce the truck queue on the unloading dock and then, manage all the delivery - Comply with a Security & Safety Audit	2016-04-23 00:00:00	5
3	Enterprise Service Catalog	Mr. Downey	2016-01-21 12:43:59	Medium	This large IT program consists in formalizing the whole Enterprise Service Catalogue. The way to articulate the Catalogue should follow the Industry Best Practices and must ensure pragmatic mapping with our actual Business	2016-08-27 00:00:00	7

## 1.2.2 Test Web Service Parameters

Before saving the Web Service adapter, the user can test it. Pressing the **Test** button will open a new pop-up window and the XML SOAP response resulting from the Web Service call is listed.

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://www.w3.org/2003/05/soap-envelope" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <soap:Body>
    <GetWeatherReportResponse xmlns="http://www.webserviceX.NET">
      <GetWeatherReportResult>&lt;Weather&gt;&lt;City&gt;&lt;/City&gt;&lt;State&gt;&lt;/State&gt;&lt;County&gt;&lt;/County&gt;&lt;/GetWeatherReportResult>
    </GetWeatherReportResponse>
  </soap:Body>
</soap:Envelope>
```

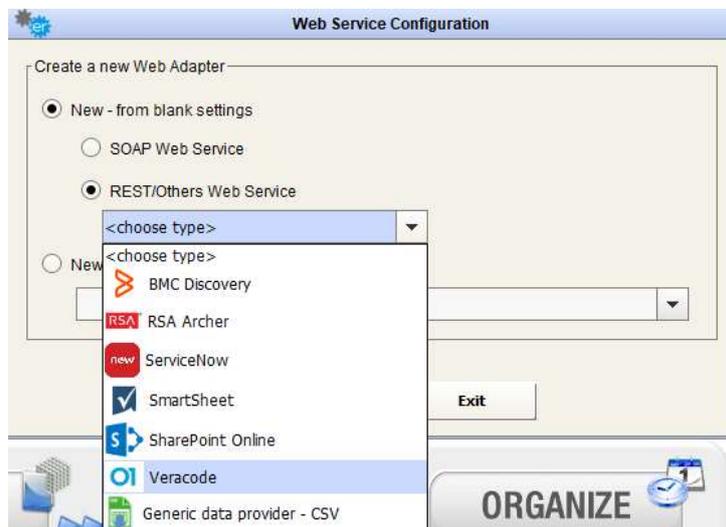
---

The  button closes the data preview window and goes back to Web Service configuration form.

If you have not saved before testing the Web Service Configuration, remember to press the  button, before leaving the parent window and all the entered parameters will be stored into the DT databases.

### 1.2.3 Add or Modify REST/others Web Service Adapter

To create a new adapter just press the , and select “REST/Others Web Service” in the following popup:

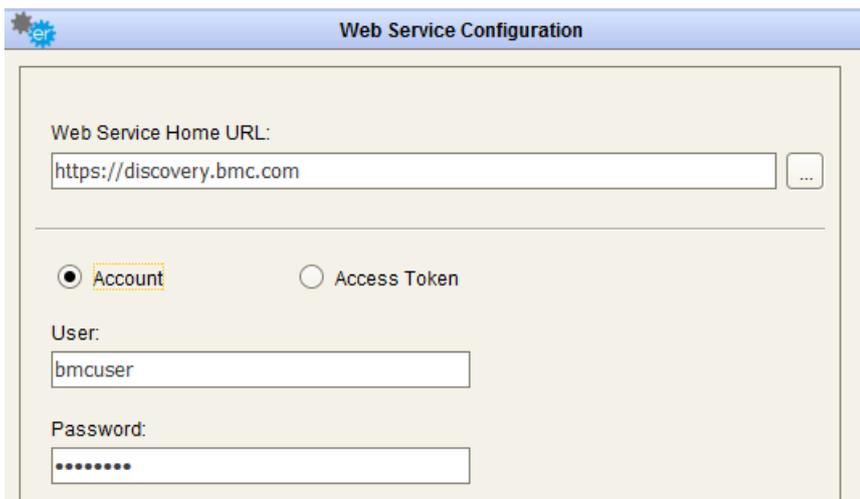


To modify an existing adapter selected from the list, press the . An editing window pops up.

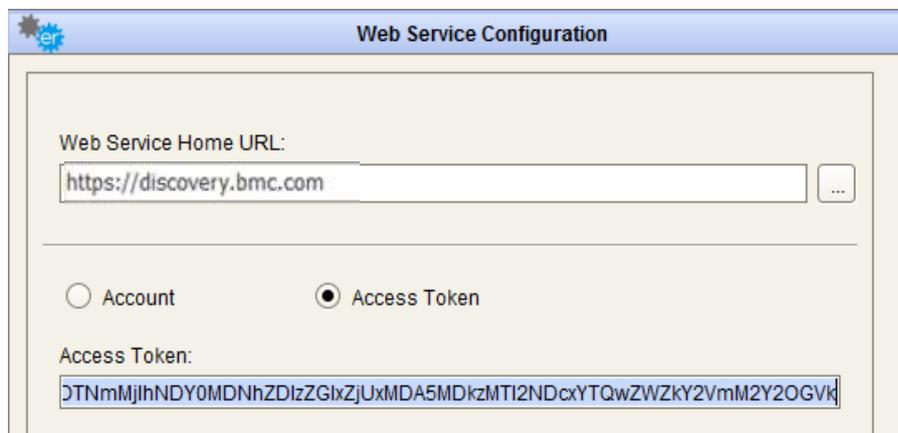
---

## 1.2.4 BMC Discovery

To use the adapter for **BMC Discovery**, fill the field “Web Service Home URL” with the SmartSheet home page URL you want to connect to. Then provide the **username** and **password** for a valid BMC Account or an **access token** to connect. To generate an access token, please refer to BMC Discovery System Administrator

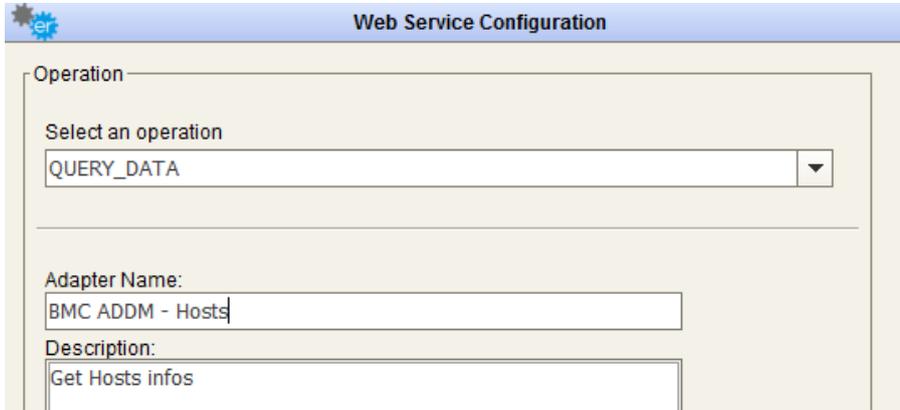


The screenshot shows a dialog box titled "Web Service Configuration". At the top left is a gear icon with the letter "e". The main content area has a light beige background. The first section is labeled "Web Service Home URL:" and contains a text input field with the value "https://discovery.bmc.com" and a small square button with three dots to its right. Below this is a horizontal line. The next section contains two radio buttons: the first is selected and labeled "Account", and the second is unselected and labeled "Access Token". Below the radio buttons are two more text input fields: "User:" with the value "bmcuser" and "Password:" with a masked value of "\*\*\*\*\*".



The screenshot shows the same "Web Service Configuration" dialog box. The "Web Service Home URL:" field still contains "https://discovery.bmc.com". In this view, the "Access Token" radio button is selected, and the "Account" radio button is unselected. Below the radio buttons is a text input field labeled "Access Token:" containing a long alphanumeric string: "JTNmMjIhNDY0MDNhZDZlZGlxZjUxMDA5MDkzMTI2NDcxYTQwZWZKY2VmM2Y2OGVkJ".

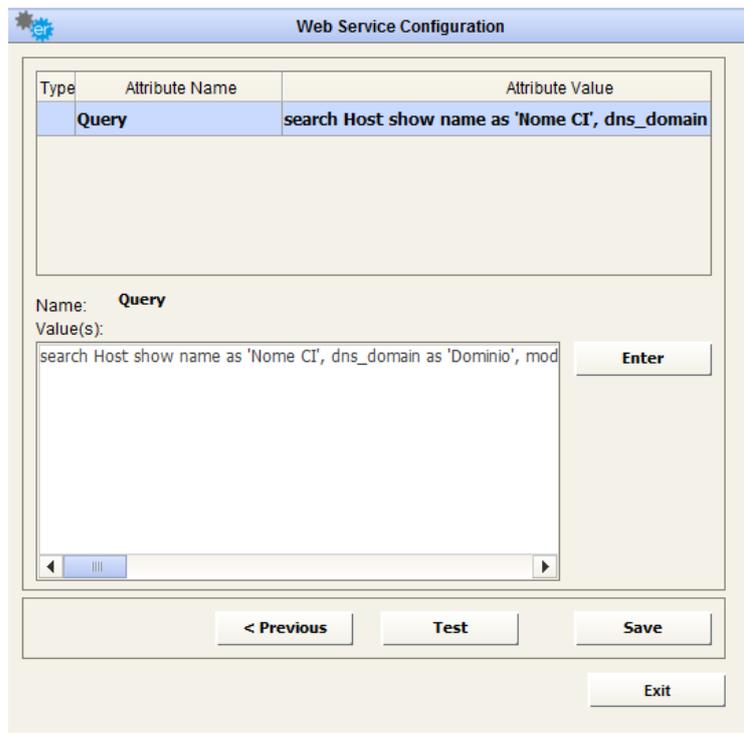
The  button steps into the next window that shows the available operation of that Web Service, which is “**QUERY DATA**”, allowing users to query all data stored in user worksheets.



The screenshot shows a window titled "Web Service Configuration". Under the "Operation" section, there is a dropdown menu with "QUERY\_DATA" selected. Below this, there are two text input fields: "Adapter Name:" containing "BMC ADDM - Hosts" and "Description:" containing "Get Hosts infos".

After selecting the desired operation, it is required to enter a name and a description for the adapter in the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

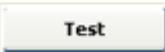
The next button  steps into the next window that allows the user to set values for the Web Service parameters.



The screenshot shows a window titled "Web Service Configuration". It features a table with the following content:

Type	Attribute Name	Attribute Value
Query	search Host show name as 'Nome CI', dns_domain	

Below the table, there is a "Name:" field with the value "Query". Underneath is a "Value(s):" text area with a scroll bar containing the text: "search Host show name as 'Nome CI', dns\_domain as 'Dominio', mod". To the right of the text area is an "Enter" button. At the bottom of the window, there are four buttons: "< Previous", "Test", "Save", and "Exit".

Pressing the  button will open a new pop-up window. The response resulting from the Web Service call is displayed.

Nome Cl	Dominio	Modello	Tipo CPU	Numero C	RAM Fisica	S.O.	Kernel	Versione	Hardware	Virtual	Partition	Indirizzo IP	Alias DNS
edscprw	aceaspa...	VMware ...	Intel(R) X...	1	1024	Microsoft...	Unproces...	Server 20...	VMware, ...	true		10.55.21...	
ahcmpr...	aceaspa...	VMware ...	Intel(R) X...	2	4096	Microsoft ...	Multproc...	Server 20...	VMware, ...	true		10.55.21...	portalem...
webats2...	aceaspa...	VMware ...	Intel(R) X...	4	4096	Microsoft...	Multproc...	Server 20...	VMware, ...	true		10.55.21...	.....fmi...
ahgmspra...	aceaspa.t	VMware ...	Intel(R) X...	1	4096	Microsoft ...	Multproc...	Server 20...	VMware, ...	true		172.16.7...	ahgmspra...
ahstypa...	aceaspa.t	VMware ...	Intel(R) X...	1	2048	Microsoft ...	Multproc...	Server 20...	VMware, ...	true		172.16.7...	ahstypa...
raepri12		VMware ...	Intel(R) X...	4		CentOS r...	2.6.18-3...	3.9	VMware, ...	true		10.65.30...	...
ahtpwr...	aceaspa.t	VMware ...	Intel(R) X...	2		CentOS r...	2.6.32-3...	6.4	VMware, ...	true		172.16.7...	...
ahwebpr...	aceaspa...	VMware ...	Intel(R) X...	2	4096	Microsoft ...	Multproc...	Server 20...	VMware, ...	true		10.55.34...	.....ace2...
addcord...		VMware ...	Intel(R) X...	2		Microsoft ...	Multproc...	Server 20...	VMware, ...	true		10.55.33...	...
server04	aceaspa...	VMware ...	Intel(R) X...	2	2048	Microsoft ...	Multproc...	Server 20...	VMware, ...	true		10.55.21...	...
ahfpbrw...		VMware ...	Intel(R) X...	2		Microsoft ...	Multproc...	Server 20...	VMware, ...	true		10.55.34...	documen...
coco	aceaspa...	VMware ...	Intel(R) X...	4	4096	Microsoft ...	Multproc...	Server 20...	VMware, ...	true		10.55.31...	coco.ace...
ahwebpr...		VMware ...	Intel(R) X...	2		Microsoft ...	Multproc...	Server 20...	VMware, ...	true		10.55.34...	.....ace2...
addcpa...		VMware ...	Intel(R) X...	2		Microsoft ...	Multproc...	Server 20...	VMware, ...	true		10.55.34...	...

Page 1 of 36 (1-50)

Pressing the  button will store all the entered parameters for the web service adapter in the DT database.

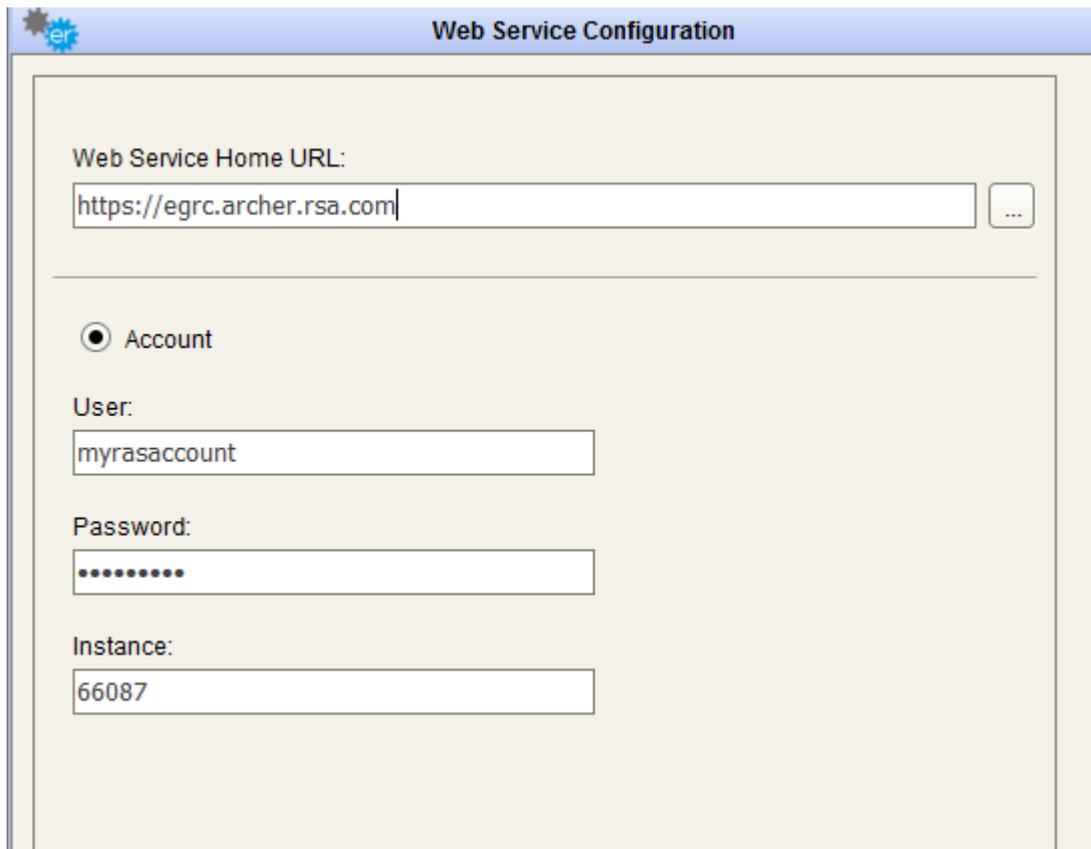
The  button closes the data preview window and goes back to Web Service configuration form.

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## 1.2.5 RSA Archer – VIEW REPORT

To use the adapter for **RSA Archer, to read report contents**, fill the field “Web Service Home URL” with the RSA URL you want to connect to.

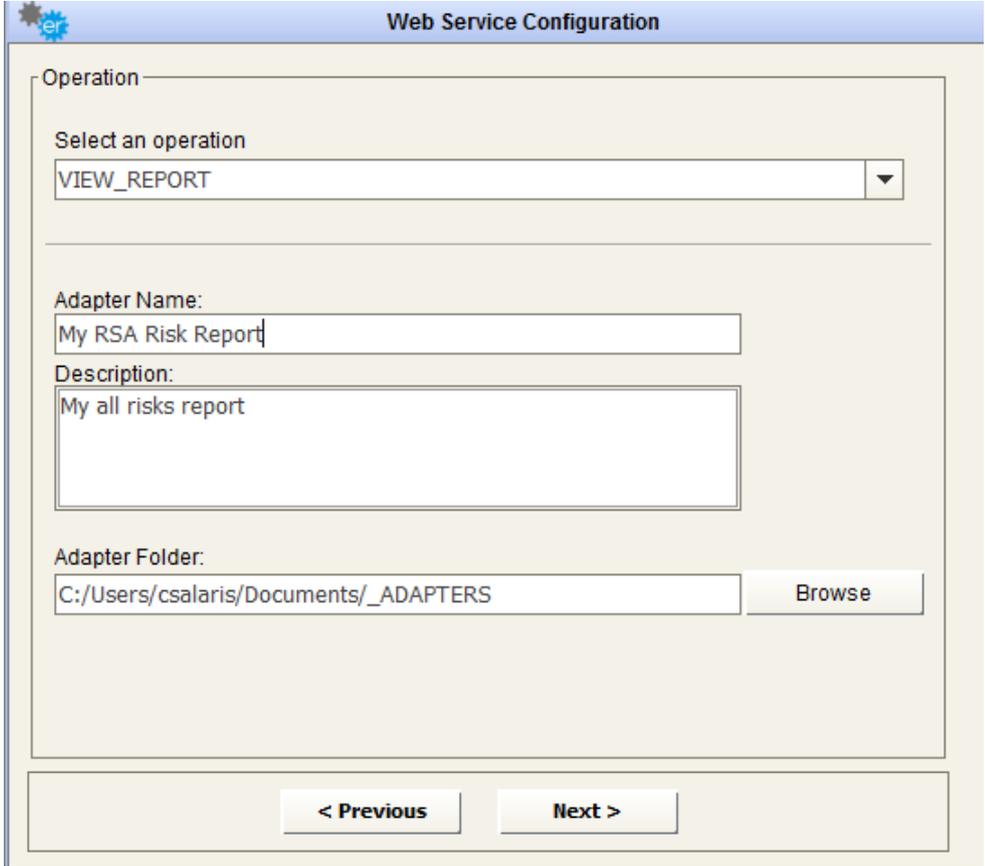
Then, provide a valid instance URL and username/password to connect.



The screenshot shows a "Web Service Configuration" dialog box. It contains the following fields and options:

- Web Service Home URL:** A text box containing the URL `https://egrc.archer.rsa.com`.
- Account:** A radio button is selected next to the label "Account".
- User:** A text box containing the username `myrasaccount`.
- Password:** A text box containing masked characters (dots).
- Instance:** A text box containing the instance ID `66087`.

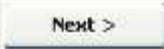
The  button steps into the next window that shows the available operations of this Web Service; choose “**VIEW REPORT**”, to query data as per RSA report definition.



The image shows a dialog box titled "Web Service Configuration". It contains the following fields and controls:

- Operation:** A dropdown menu with "VIEW\_REPORT" selected.
- Adapter Name:** A text box containing "My RSA Risk Report".
- Description:** A text box containing "My all risks report".
- Adapter Folder:** A text box containing "C:/Users/csalaris/Documents/\_ADAPTERS" and a "Browse" button.
- Navigation:** "< Previous" and "Next >" buttons at the bottom.

After selecting the desired operation, it is required to enter a name and a description for the adapter into the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to set values for the Web Service parameters.

When a lens icon shows beside the parameter name:



this means that user may set the parameter value from a list of available items.

In the case of the RSA Archer “View Report” operation, double-click on the lens icon besides “reportIdOrGuid” parameter, a popup appears, with the available reports to query:

The screenshot shows a 'Web Service Configuration' window with a table of parameters. The 'reportIdOrGuid' parameter has a lens icon next to it. A blue arrow points from this icon to a 'Field Values Preview' popup window. The popup window displays a table of reports with columns: ReportName, ReportDescription, ReportGUID, ApplicationName, and ApplicationGUID. The 'Risks - All' report is selected and highlighted in blue.

ReportName	ReportDescription	ReportGUID	ApplicationName	ApplicationGUID
Risk With Metrics That Decreases...		c3444d55-ecfd-4335-b154-1b0...	Self-Assessment	31bc75bf-b2ec-4ea2-afbf-0711...
Risk With Metrics That Increase...		40152bb6-d070-425f-a121-460...	Self-Assessment	31bc75bf-b2ec-4ea2-afbf-0711...
Risk With Metrics That Increase...		9e77e460-501f-46ea-a0e4-d36...	Self-Assessment	31bc75bf-b2ec-4ea2-afbf-0711...
Risk and Control Matrix	This report displays the Risk and...	2498b022-43b3-4603-abef-bbe...	Control Procedures	b8bcbf64-37c5-4e4a-a176-539d...
Risk by Model Category		7b3f5d63-e242-4751-a553-43b...	Model Inventory	acf35c14-7c18-4a91-9e24-a52b...
RiskBusiness All Process Records	This report provides a list of all ...	13e05804-1185-484a-8e0c-fc1...	Business Processes	e8ee6401-b423-46c2-baac-abd...
RiskBusiness All Products and Se...	This report produces a list of vt...	844c35c-963e-4860-8466-36b...	Products and Services	782e5dfc-3789-43e0-b8cf-bcde...
RiskBusiness Dependent Metrics...		285b09b1-e843-48c9-ae09-8e7...	Metrics	95049677-9da0-4687-b1e6-02...
RiskBusiness Dependent Metrics...		8dc9a319-2fa1-4639-ab56-5b2...	Performance Monitoring	2b28240c-fc6b-4c0e-8857-e46b...
RiskBusiness Product, Process, ...	This report depicts all of the Rc...	5903b928-cd85-4745-a31f-3d8...	Products and Services	782e5dfc-3789-43e0-b8cf-bcde...
RiskBusiness Risk to Metric Map	This report provides a list of the...	01a533cb-376f-4a0f-9240-4aba...	Risk Register	13bf8c1-0fac-4e08-ba96-faab...
Risks - All	This report displays the Status ...	63e37893-32e3-4f85-82c3-bd8...	Risk Register	13bf8c1-0fac-4e08-ba96-faab...
Risks Added, Changed Or Remo...		03286d31-2c26-41de-b5e3-8d...	Self-Assessment	31bc75bf-b2ec-4ea2-afbf-0711...
Risks Added, Changed Or Remo...		069e401f-207f-4d71-935f-fab39...	Self-Assessment	31bc75bf-b2ec-4ea2-afbf-0711...

Page 47 of 54 (2301-2350)

Buttons: Apply, Exit

Select and apply the selection, and the desired report GUID fills the parameter value:

The screenshot shows the 'Web Service Configuration' window. The 'reportIdOrGuid' parameter is selected, and its value is now filled with the GUID: 63e37893-32e3-4f85-82c3-bd8f09b52355. Below the table, the 'Name' is 'reportIdOrGuid' and the 'Value(s)' field contains the same GUID. An 'Enter' button is visible next to the value field.

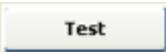
Type	Attribute Name	Attribute Value
	reportIdOrGuid	63e37893-32e3-4f85-82c3-bd8f09b52355

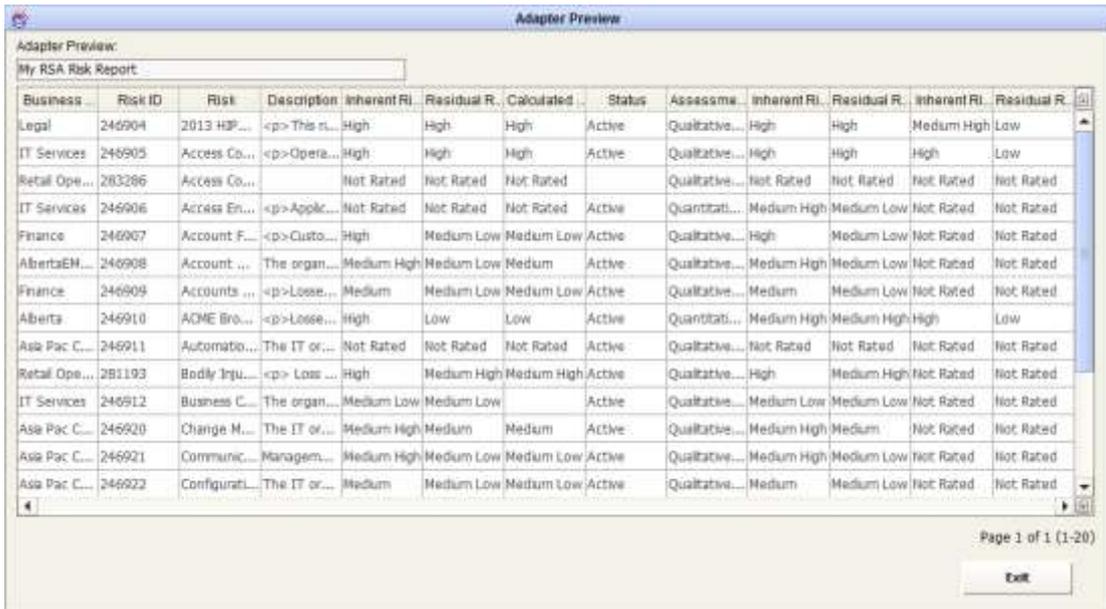
Name: reportIdOrGuid

Value(s): 63e37893-32e3-4f85-82c3-bd8f09b52355

Enter

Should the provided account not be granted to read system tables (such as the one containing the list of user tables) the popup will be blank, but **the parameters** can always be **manually filled**.

Pressing the  button and a new pop-up window is opened and the response resulting from the Web Service call is displayed.



The screenshot shows a window titled "Adapter Preview" with a sub-header "My RSA Risk Report". It contains a table with the following columns: Business, Risk ID, Risk, Description, Inherent RI, Residual R., Calculated, Status, Assessme..., Inherent RI., Residual R., Inherent RI., Residual R. The table lists various risks across different business units like Legal, IT Services, Retail Ope..., Finance, AlbertaEH..., and Asia Pac C... with their respective risk levels and statuses.

Business	Risk ID	Risk	Description	Inherent RI	Residual R.	Calculated	Status	Assessme...	Inherent RI.	Residual R.	Inherent RI.	Residual R.
Legal	246904	2013 H3P...	<p>This s...	High	High	High	Active	Qualitative...	High	High	Medium High	Low
IT Services	246905	Access Co...	<p>Opera...	High	High	High	Active	Qualitative...	High	High	High	Low
Retail Ope...	263286	Access Co...		Not Rated	Not Rated	Not Rated		Qualitative...	Not Rated	Not Rated	Not Rated	Not Rated
IT Services	246906	Access En...	<p>Applc...	Not Rated	Not Rated	Not Rated	Active	Quantitati...	Medium High	Medium Low	Not Rated	Not Rated
Finance	246907	Account F...	<p>Custo...	High	Medium Low	Medium Low	Active	Qualitative...	High	Medium Low	Not Rated	Not Rated
AlbertaEH...	246908	Account ...	The organ...	Medium High	Medium Low	Medium	Active	Qualitative...	Medium High	Medium Low	Not Rated	Not Rated
Finance	246909	Accounts ...	<p>Loose...	Medium	Medium Low	Medium Low	Active	Qualitative...	Medium	Medium Low	Not Rated	Not Rated
Aberts	246910	ACME Bro...	<p>Loose...	High	Low	Low	Active	Quantitati...	Medium High	Medium High	High	Low
Asia Pac C...	246911	Automatio...	The IT or...	Not Rated	Not Rated	Not Rated	Active	Qualitative...	Not Rated	Not Rated	Not Rated	Not Rated
Retail Ope...	281193	Bodily Inju...	<p> Loss ...	High	Medium High	Medium High	Active	Qualitative...	High	Medium High	Not Rated	Not Rated
IT Services	246912	Business C...	The organ...	Medium Low	Medium Low		Active	Qualitative...	Medium Low	Medium Low	Not Rated	Not Rated
Asia Pac C...	246920	Change M...	The IT or...	Medium High	Medium	Medium	Active	Qualitative...	Medium High	Medium	Not Rated	Not Rated
Asia Pac C...	246921	Communic...	Managem...	Medium High	Medium Low	Medium Low	Active	Qualitative...	Medium High	Medium Low	Not Rated	Not Rated
Asia Pac C...	246922	Configurat...	The IT or...	Medium	Medium Low	Medium Low	Active	Qualitative...	Medium	Medium Low	Not Rated	Not Rated

Page 1 of 1 (1-20)

Exit

Pressing the  button will store all the entered parameters for the web service adapter in the DT database.

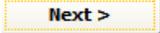
The  button closes the data preview window and goes back to the Web Service configuration form.

### 1.2.6 RSA Archer – EXECUTE DATA FEED

To use the adapter for **RSA Archer**, to **execute a data feed**, fill the field “Web Service Home URL” with the ServiceNow instance URL you want to connect to.

Then, provide a valid instance URL and ID, username/password to connect.

The image shows a 'Web Service Configuration' dialog box. At the top, there is a title bar with a gear icon and the text 'Web Service Configuration'. Below the title bar, the 'Web Service Home URL:' is set to 'https://egrc.archer.rsa.com'. A radio button labeled 'Account' is selected. The 'User:' field contains 'myrasaccount', the 'Password:' field is masked with dots, and the 'Instance:' field contains '66087'. There is a 'Next >' button at the bottom right of the dialog.

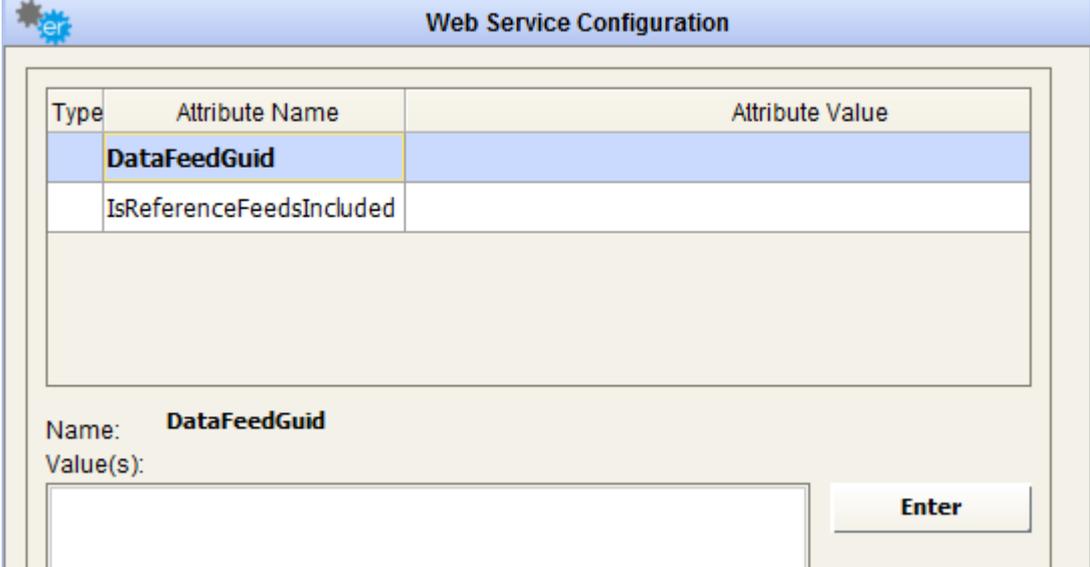
The  button steps into the next window that shows the available operations of this Web Service; choose **“DATA FEED”**, to manage data feed executions.

The image shows the 'Web Service Configuration' dialog box at the 'Operation' step. The title bar is the same. Under the 'Operation' section, a dropdown menu is open, showing 'DATA\_FEED' as the selected option. Below this, the 'Adapter Name:' field contains 'RSA - My DATA FEED 4 Vendors'. The 'Description:' field is empty. The 'Adapter Folder:' field contains 'C:/Users/csalaris/Documents/\_ADAPTERS' and has a 'Browse' button next to it.

---

After selecting the desired operation, it is required to enter a name and a description for the adapter in the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to set values for the Web Service parameters.



The screenshot shows a window titled "Web Service Configuration" with a table of attributes. The table has three columns: "Type", "Attribute Name", and "Attribute Value". The first row is highlighted in blue and contains "DataFeedGuid" in the "Attribute Name" column. The second row contains "IsReferenceFeedsIncluded" in the "Attribute Name" column. Below the table, there are two input fields: "Name:" with the value "DataFeedGuid" and "Value(s):" with an empty text box. An "Enter" button is located to the right of the "Value(s):" field.

Type	Attribute Name	Attribute Value
	DataFeedGuid	
	IsReferenceFeedsIncluded	

Name: DataFeedGuid  
Value(s):

After that, user should complete configuration, filling the parameters (select the parameter, write value and press the  button):

- **DataFeedGuid:** Data Feed GUID, it can be retrieved from RSA Archer application
- **IsReferenceFeedsIncluded:** must be "true" before any referenced data feeds can run. If you want to run a single data feed without any referenced feeds, you must ensure that the flag is set to "false".

Pressing the  button will store all the entered parameters for the web service adapter in the DT database.

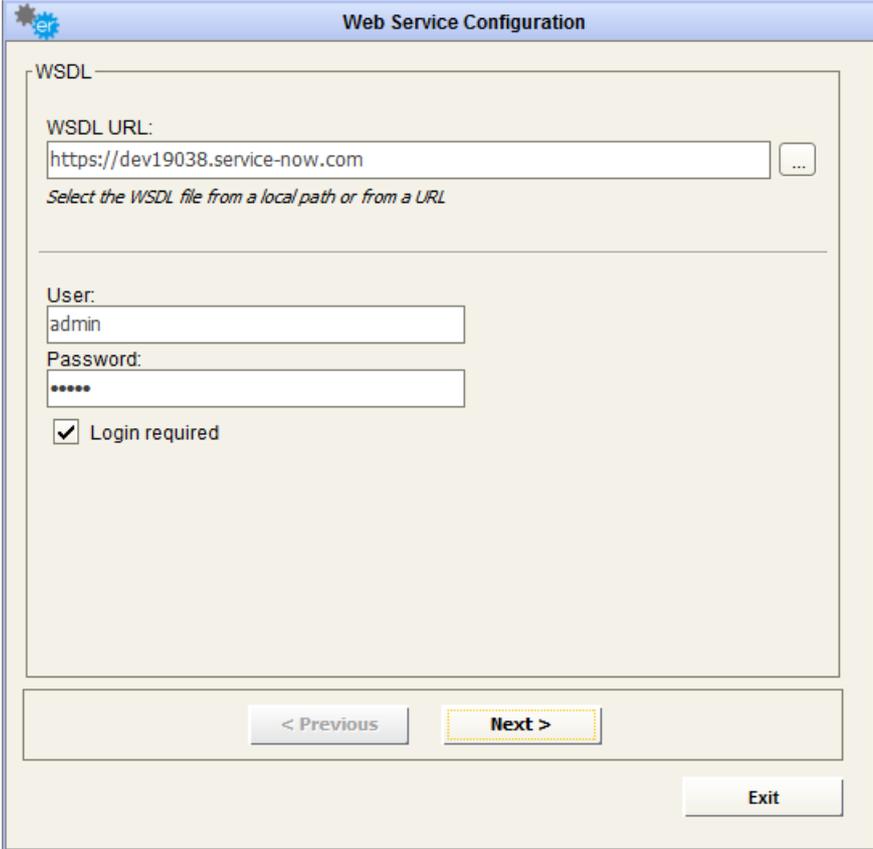
The  button closes the data preview window and goes back to Web Service configuration form.

---

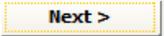
## 1.2.7 ServiceNow – READ TABLES

To use the adapter for **ServiceNow**, to read table contents, fill the field “Web Service Home URL” with the ServiceNow instance URL you want to connect to.

Then, provide a valid instance URL, username/password to connect.

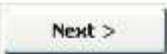


The screenshot shows a "Web Service Configuration" window. It has a "WSDL" section with a "WSDL URL" text box containing "https://dev19038.service-now.com" and a browse button. Below this is the text "Select the WSDL file from a local path or from a URL". There are also "User:" and "Password:" text boxes, with "admin" and "\*\*\*\*\*" respectively. A "Login required" checkbox is checked. At the bottom, there are three buttons: "< Previous", "Next >", and "Exit".

The  button steps into the next window that shows the available operations of that Web Service; choose “**READ TABLES**”, to query data stored in ServiceNow tables.

The screenshot shows a 'Web Service Configuration' window. It has a title bar with a gear icon and the text 'Web Service Configuration'. The main content area is titled 'Operation' and contains a dropdown menu with 'READ\_TABLES' selected. Below this are three input fields: 'Adapter Name' with the text 'ServiceNow GET - Applications', 'Description' (empty), and 'Adapter Folder' with the text 'C:/Users/ccUser/Documents/\_ADAPTERS' and a 'Browse' button. At the bottom, there are three buttons: '< Previous', 'Next >', and 'Exit'.

After selecting the desired operation, it is required to enter a name and a description for the adapter in the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to set values for the Web Service parameters.

When a lens icon shows beside the parameter name:

 Table name	cmdb_ci_appl
--	--------------

this means that user may set the parameter value from a list of available items.

In case of ServiceNow “read tables” operation, with the double-click on the lens icon besides “Table name” parameter, a popup appears, with the available tables to query:

The screenshot shows the 'Web Service Configuration' interface. A table with columns 'Type', 'Attribute Name', and 'Attribute Value' is visible. The 'Table name' attribute is selected, and a lens icon is double-clicked. An 'Adapter Preview' popup is shown, displaying a table of available tables. The 'Application' row is highlighted.

label	name	super_class	is_extensible	sys_updated_on
App Log Entry	syslog_app_scope0005	Log Entry	false	2016-09-19 04:25:42
App Log Entry	syslog_app_scope0004	Log Entry	false	2016-09-19 04:25:39
App Log Entry	syslog_app_scope	Log Entry	false	2016-09-19 04:09:30
App Log Entry	syslog_app_scope0003	Log Entry	false	2016-09-19 04:25:37
App Log Entry	syslog_app_scope0005	Log Entry	false	2016-09-19 04:25:41
App Template	sn_appcreator_app_template	Application File	false	2016-09-19 04:31:40
Application	sys_scope	Package	true	2016-09-19 04:09:14
<b>Application</b>	<b>cmdb_ci_appl</b>	<b>Configuration Item</b>	<b>true</b>	<b>2016-09-19 04:14:44</b>
Application Cluster	cmdb_ci_application_cluster	Configuration Item	false	2016-09-19 04:15:56
Application File	sys_metadata		true	2016-09-19 04:09:10
Application File Types	sys_app_file_type		false	2016-09-19 04:11:41
Application Menu	sys_app_application	Application File	false	2012-10-30 13:59:18
Application Menu	sys_ui_application	Application File	false	2016-09-19 04:12:56
Application Metadata	ui_app_metadata		false	2016-09-19 04:30:27
Application Model	cmdb_application_product_model	Product Model	false	2016-09-19 04:14:34
Application PID	cmdb_pid		false	2016-09-19 04:15:59

Select and apply the selection, and the desired table name (as expected by ServiceNow export service) fills the “Table name” parameter value:

The screenshot shows the 'Web Service Configuration' interface. The 'Table name' attribute in the table is now filled with the value 'cmdb\_ci\_appl'.

Type	Attribute Name	Attribute Value
	<b>Table name</b>	<b>cmdb_ci_appl</b>
	View name	ess
	Filters	ORDERBYname

---

Should the provided account not be granted to read system tables, as the one containing the list of user tables, the popup will be blank, but **the parameters** can always be **manually filled**.

After that, the user may apply optional formatting/filter settings, filling the parameters (select the parameter, write value and press the  button ):

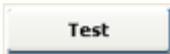
- **View Name:** name of the desired view. For example, to export fields visible from the Self Service view, parameter value is “**ess**”
- **Filters:** some additional parameters may be added to control for instance:
  - the sorting of results: “**ORDERBYname**”
  - the data filtering: “**category=Resource**”

Concatenate different filters with ampersand; for instance:

**category=Resource&ORDERBYname**

Complete reference for filters can be found at the ServiceNow website:

[https://wiki.servicenow.com/index.php?title=Excel\\_Export\\_Threshold#Using\\_URL\\_Queries\\_to\\_Filter\\_List\\_Results](https://wiki.servicenow.com/index.php?title=Excel_Export_Threshold#Using_URL_Queries_to_Filter_List_Results)

Pressing the  button will open a new pop-up window and the response resulting from the Web Service call is displayed.

Pressing the  button stores all the entered parameters for the web service adapter in the DT database.

The  button closes the data preview window and goes back to Web Service configuration form.

Adapter Preview

My ServiceNow Adapter for applications.

name	sys_class_name	category	version	operational_status
apache linux den 200	Web Server		6.0	Operational
apache linux ny 100	Web Server		6.0	Operational
CM5 App FLX	Application			Operational
EXOH-SO-05	Email Server			Operational
EXOH-SO-07	Email Server			Operational
EXCHANGE-NY-02	Email Server			Operational
IronMail-SO-01	Email Server			Operational
IronMail-SO-02	Email Server			Operational
Java Application Server FLX	JavaServer			Operational
My Corporate Collector app	Application	Resource	5.0.0	Operational
PS Apache01	Web Server		6.0	Operational
PS Apache02	Web Server		6.0	Operational
PS Apache03	Web Server		6.0	Operational
SAP WEB01	Web Server		6.0	Operational
SAP WEB02	Web Server		6.0	Operational
SAP WEB03	Web Server		6.0	Operational

Page 1 of 1 (1-17)

Exit

## 1.2.8 ServiceNow – PUSH DATA

To use the adapter for **ServiceNow**, to push data to the system, fill the field “Web Service Home URL” with the ServiceNow instance URL you want to connect to.

Then provide a valid instance URL, username/password to connect.

Web Service Configuration

WSDL

WSDL URL:  
 ...

*Select the WSDL file from a local path or from a URL*

---

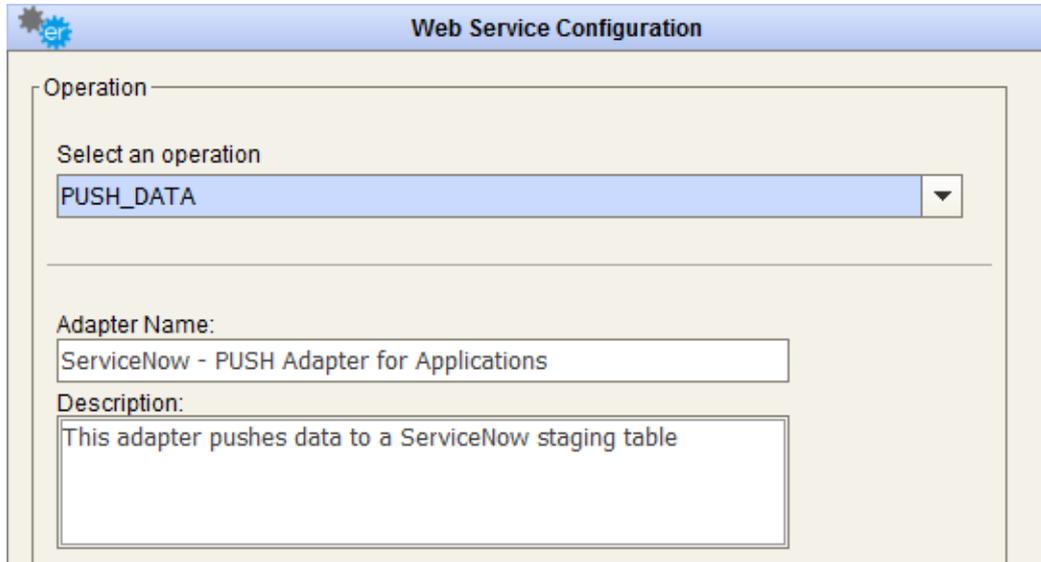
User:

Password:

Login required

---

The  button steps into the next window that shows the available operations of that Web Service; choose “**PUSH DATA**”, to query data stored in ServiceNow tables.

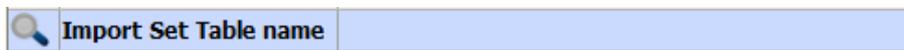


The screenshot shows a window titled "Web Service Configuration". Inside, there is a section labeled "Operation" with a dropdown menu set to "PUSH\_DATA". Below this, there are two text input fields: "Adapter Name:" containing "ServiceNow - PUSH Adapter for Applications" and "Description:" containing "This adapter pushes data to a ServiceNow staging table".

After selecting the desired operation, it is required to enter a name and a description for the adapter into the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The  button steps into the next window that allows the user to set values for the Web Service parameters.

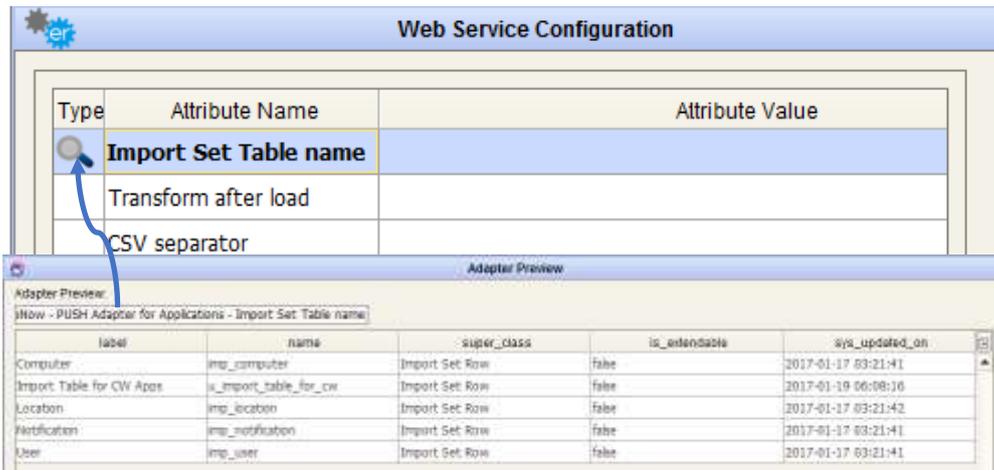
When a lens icon shows beside the parameter name, as for “**Import Set Table name**”:



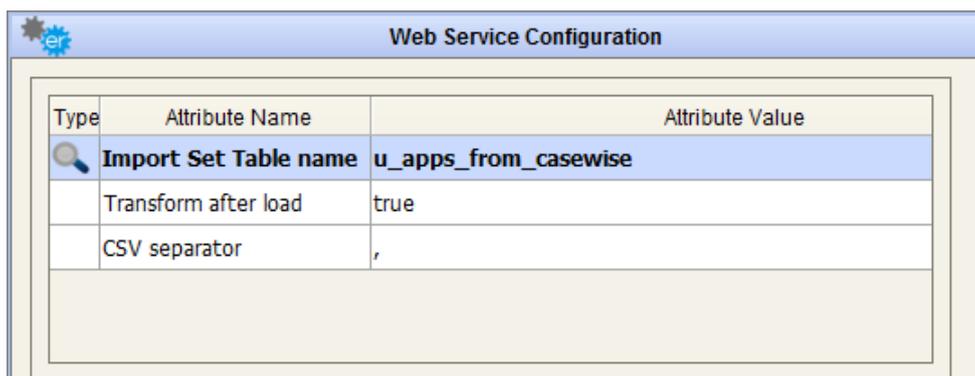
The screenshot shows a parameter field with a lens icon on the left and the text "Import Set Table name" inside a blue-bordered box.

this means that user may set the parameter value from a list of available items.

In case of ServiceNow “**push data**” operation, with the double-click on the lens icon, a table appears, with the available import set tables:



Select the proper one and apply the selection, and the desired import set table name fills the “Import Set Table name” parameter value:



Should the provided account not be granted to read system tables, as the one containing the list of user tables, the popup will be blank, but **the parameters** can always be **manually filled**.

After that, user complete push operations configuration, filling the parameters (select the parameter, write value and press  button ):

- **Transform after load:** set to “true” if there is a Transformation Map set between the Import Set Table and ServiceNow target table to be applied after staging table load, “false” or blank otherwise
- **CSV separator:** comma as default

---

Documentation about import set tables and transformation map can be found at the ServiceNow website:

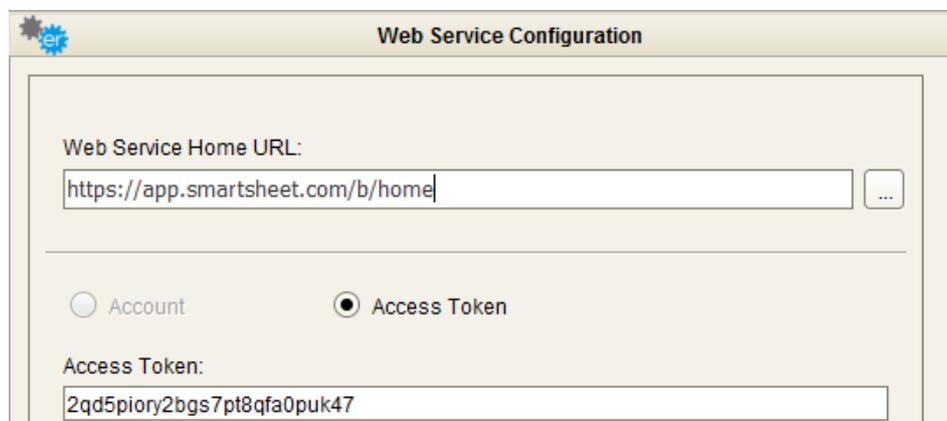
[http://wiki.servicenow.com/index.php?title=Importing\\_Data\\_Using\\_Import\\_Sets#Posting\\_CSV\\_or\\_Excel\\_Files\\_Directly\\_to\\_an\\_Import\\_Set&gs.c.tab=0](http://wiki.servicenow.com/index.php?title=Importing_Data_Using_Import_Sets#Posting_CSV_or_Excel_Files_Directly_to_an_Import_Set&gs.c.tab=0)

Pressing the  button stores all the entered parameters for the web service adapter in the DT database.

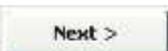
The  button closes the data preview window and goes back to Web Service configuration form.

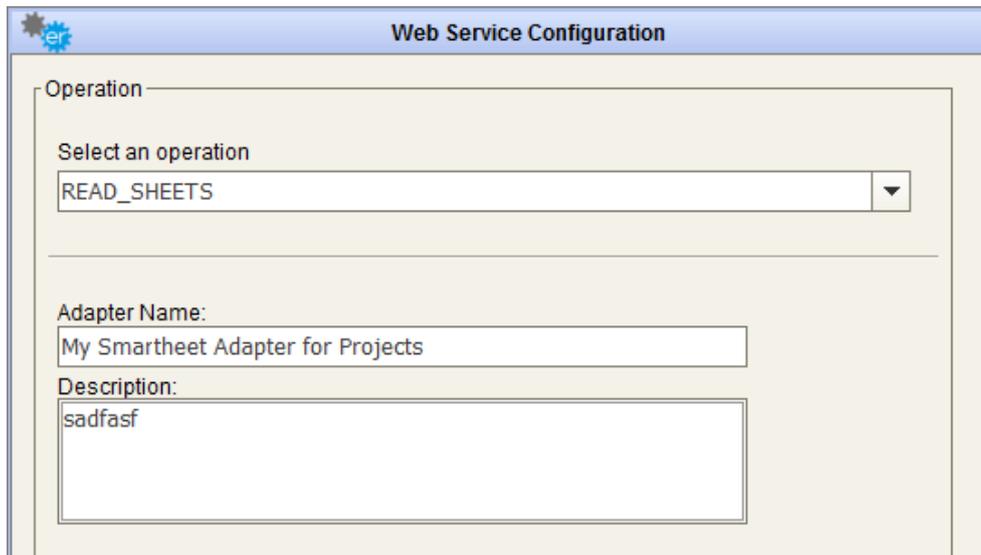
### 1.2.9 SmartSheet

To use the adapter for **SmartSheet**, fill the field “Web Service Home URL” with the SmartSheet home page URL you want to connect to.



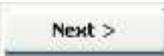
Then, provide a valid **access token** to connect. To generate an access token, requested to authenticate the SmartSheet service, follow instructions from <https://smartsheet-platform.github.io/api-docs/?shell>

The  button steps into the next window that shows the available operation of that Web Service, which is “**READ SHEETS**”, allowing user to query all data stored in user worksheets.



The image shows a 'Web Service Configuration' dialog box. It has a title bar with a gear icon and the text 'Web Service Configuration'. Inside, there is a section titled 'Operation' with a dropdown menu currently showing 'READ\_SHEETS'. Below this, there are two text input fields: 'Adapter Name:' containing 'My Smartheet Adapter for Projects' and 'Description:' containing 'sadfasf'.

After selecting the desired operation, it is required to enter a name and a description for the adapter in the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to set values for the Web Service parameters.

When a lens icon shows beside the parameter name:

Type	Attribute Name	Attribute Value
	Sheet name	

this means that user may choose the parameter value from a list of available items.

In case of SmartSheet “read sheets” operation, with the double-click on the lens icon, a table appears, with the available sheets to query:

Type	Attribute Name	Attribute Value
	Sheet name	

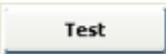
  


The image shows an 'Adapter Preview' dialog box. It has a title bar with a gear icon and the text 'Adapter Preview'. Inside, there is a text input field containing 'My Smartheet Adapter for Projects - Sheet name'. Below this, there is a table with columns: ID, Sheet name, Owner, and Version. The table contains three rows of data.

ID	Sheet name	Owner	Version
0440239394202180	My second project		
3026708001749420	My Smartheet Integration Project		
62763066271748	Sales Forecast		

Select and apply the selection, and the desired sheet name (as expected by Smartsheet export service) fills the “Sheet name” parameter value:

Type	Attribute Name	Attribute Value
	Sheet name	My Smartsheet Integration Project

Pressing the  button opens a new pop-up window and the response resulting from the Web Service call is displayed.

Task Name	Duration	Start	Finish	Predecessors	Assigned To	% Complete	Status	Comments
Test REST API	16d	2016-06-19T08:...	2016-07-06T16:...		c.salas@aepron...	0.15	In Progress	
test with postman	2d	2016-06-19T08:...	2016-06-20T16:...		Omar	0.0	At Risk	
Collector develo...	6d	2016-06-28T08:...	2016-07-01T16:...		Claudia	0.25	On Track	Sembra fattiiii!
Authentication ...	5d	2016-07-04T08:...	2016-07-08T16:...		Fahie	0.1	On Track	

Page 1 of 1 (1-4)



Pressing the  button stores all the entered parameters for the web service adapter in the DT database.

The  button closes the data preview window and goes back to Web Service configuration form.

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## 1.2.10 SharePoint Online

To use the adapter for **SharePoint Online**, fill the field “Web Service Home URL” with the SmartSheet home page URL you want to connect to.

The screenshot shows a 'Web Service Configuration' dialog box. The title bar contains the 'erwin' logo and the text 'Web Service Configuration'. The main area contains the following fields and controls:

- Web Service Home URL:** A text box containing the placeholder `https://{tenant}.sharepoint.com/sites/{siteName}/` and a browse button (three dots).
- Authentication:** A radio button labeled 'OAuth2' is selected.
- Tenant ID:** A text box containing the placeholder `{tenantID}`.
- Client ID:** A text box containing the placeholder `{clientID}`.
- Redirect URI:** A text box containing the placeholder `http://erwinCC`.
- Resource:** A text box containing the placeholder `https://{tenant}.sharepoint.com/`.

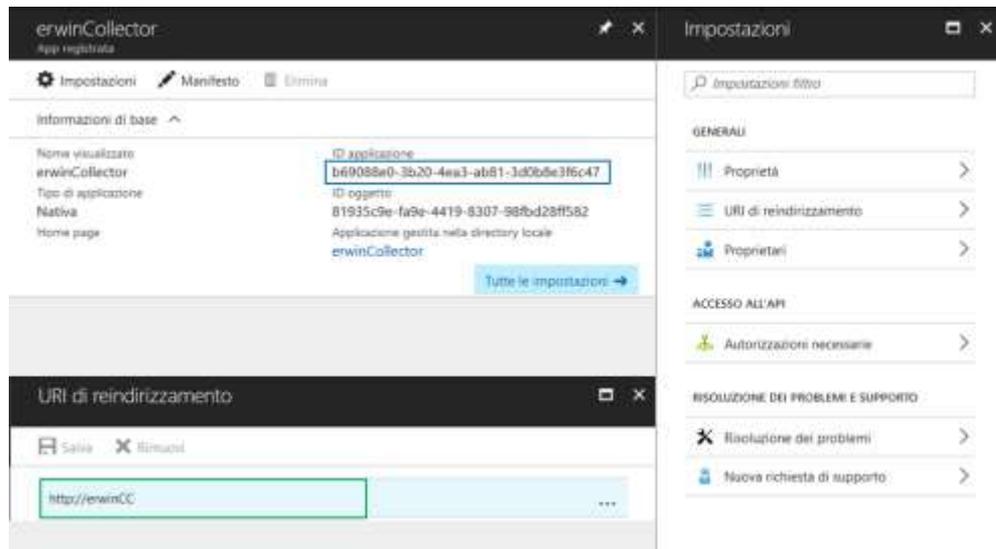
At the bottom of the dialog, there are three buttons: '< Previous', 'Next >', and 'Exit'.

To provide required parameters, please ensure that erwin DT is registered on target tenant Azure Active Directory.

See: <https://docs.microsoft.com/en-us/azure/app-service/app-service-mobile-how-to-configure-active-directory-authentication#optional-configure-a-native-client-application> about registering a **native application**.

Register DT with:

- **Name:** erwinCollector
- **Application Type:** Native
- **Redirect URI:** http://erwinCC

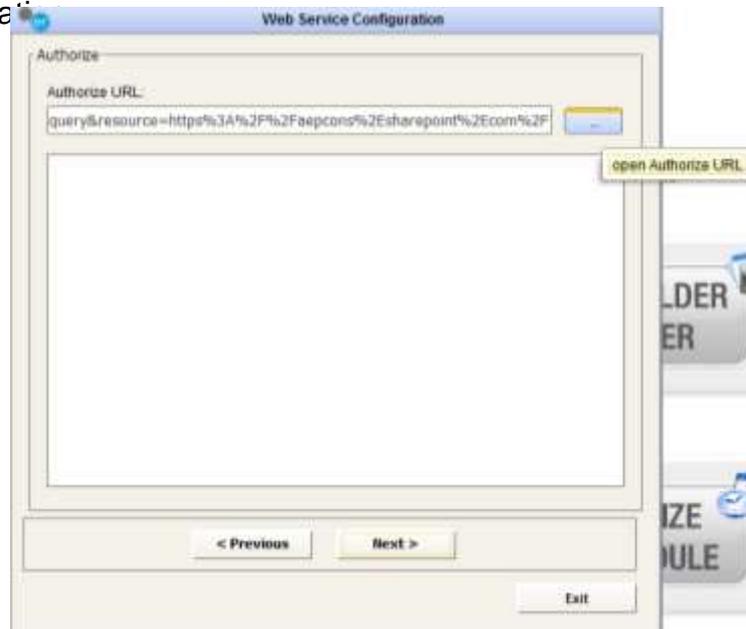


and provide all grants to read site list, for specific Microsoft API:

- Microsoft Graph:
  - Read items in all site collection
  - Access directory as the signed in user
- Microsoft Azure Active Directory:
  - Read all users' basic profiles
  - Sign in and read user profile
- Office 365 SharePoint Online (Microsoft.SharePoint)
  - Read and write items and lists in all site collections
  - Read and write items in all site collections
  - Read items in all site collections
  - Read managed metadata

---

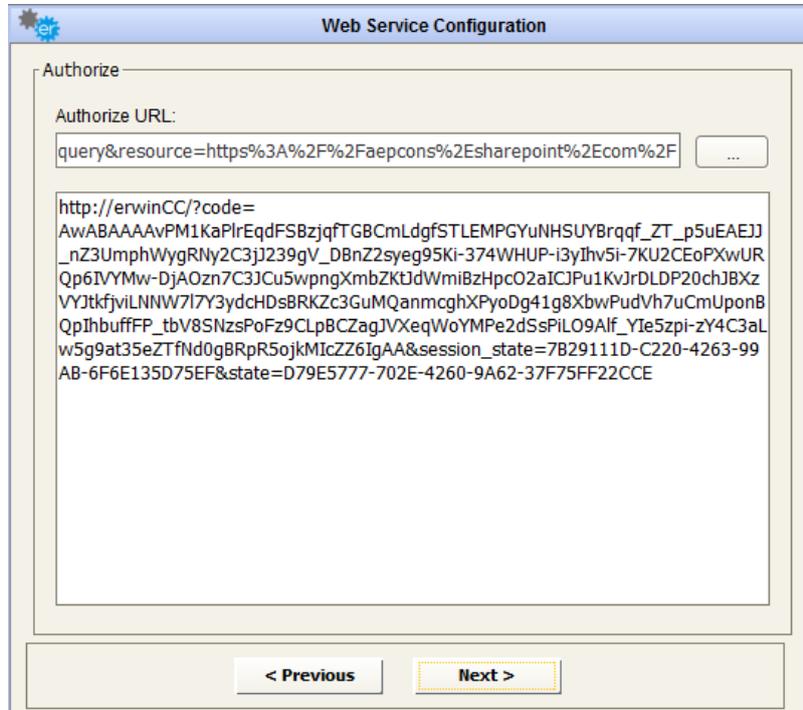
The  button steps into the next window, which requires user to browse to authorization URL and provide grant to the application.

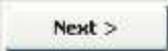


Wait for the browser to complete the request; a new page will be presented, with a URL like:

*[http://erwinCC/?code=AwABAAAAvPM1KaPIrEqdFSBzjqfTGBCmLdgfSTLEMPGYuNHSUYBrqqf\\_ZT\\_p5uEAEJJ\\_nZ3UmphWygRNY2C3jJ239gV\\_DBNZ2syeg95Ki-374WHUP-i3yIhv5i-7KU2CEoPXwURQp6IVYMW-DjAOzn7C3JCu5wpngXmbZKtJdWmiBzHpcO2aICJPu1KvJrDLDP20chJBXzVYJtkfjviLNNW7I7Y3ydcHDSBRKZc3GuMQanmcghXPyoDg41g8XbwPudVh7uCmUponBQplhbuffFP\\_tbV8SNzsPoFz9CLpBCZagJVXeQWoYMPe2dSsPiLO9Alf\\_Yle5zpi-zY4C3aLw5g9at35eZTfNd0gBRpR5ojkMlcZZ6lgAA&session\\_state=7B29111D-C220-4263-99AB-6F6E135D75EF&state=D79E5777-702E-4260-9A62-37F75FF22CCE &session\\_state=7B29111D-C220-4263-99AB-6F6E135D75EF&state=D79E5777-702E-4260-9A62-37F75FF22CCE](http://erwinCC/?code=AwABAAAAvPM1KaPIrEqdFSBzjqfTGBCmLdgfSTLEMPGYuNHSUYBrqqf_ZT_p5uEAEJJ_nZ3UmphWygRNY2C3jJ239gV_DBNZ2syeg95Ki-374WHUP-i3yIhv5i-7KU2CEoPXwURQp6IVYMW-DjAOzn7C3JCu5wpngXmbZKtJdWmiBzHpcO2aICJPu1KvJrDLDP20chJBXzVYJtkfjviLNNW7I7Y3ydcHDSBRKZc3GuMQanmcghXPyoDg41g8XbwPudVh7uCmUponBQplhbuffFP_tbV8SNzsPoFz9CLpBCZagJVXeQWoYMPe2dSsPiLO9Alf_Yle5zpi-zY4C3aLw5g9at35eZTfNd0gBRpR5ojkMlcZZ6lgAA&session_state=7B29111D-C220-4263-99AB-6F6E135D75EF&state=D79E5777-702E-4260-9A62-37F75FF22CCE &session_state=7B29111D-C220-4263-99AB-6F6E135D75EF&state=D79E5777-702E-4260-9A62-37F75FF22CCE)*

Copy the **entire URL** to DT text area:



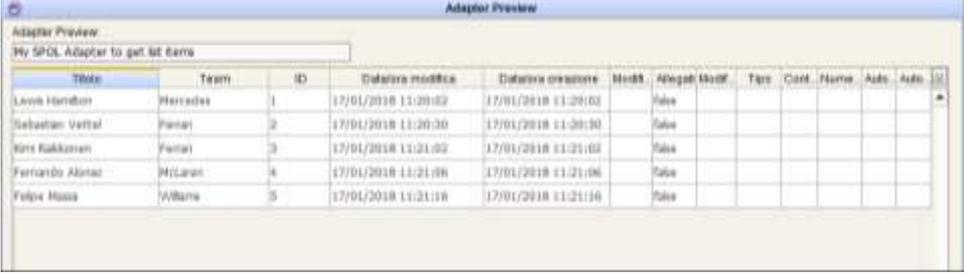
The  button steps into the next window that shows the available operation of that Web Service, which is **“READ LISTS”**.

After selecting the desired operation, it is required to enter a name and a description for the adapter in the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to set values for the Web Service parameters.

Select the list – double click on lens icon beside “List GUID” open a list of available lists – and apply the selection, and the desired list GUID (as expected by Sharepoint export API) fills the parameter value

Pressing the  button opens a new pop-up window and the response resulting from the Web Service call is displayed.



The screenshot shows a window titled 'Adapter Preview' with a sub-header 'My SPQL Adapter to get list items'. It contains a table with the following data:

Title	Team	ID	Database modified	Database created	Month	Always Work	Tip	Conf. Name	Auto	Auto
Luis Hernandez	Harades	1	17/01/2018 11:20:02	17/01/2018 11:20:02		False				
Sebastian Vettel	Ferrari	2	17/01/2018 11:20:30	17/01/2018 11:20:30		False				
Kimi Raikkonen	Ferrari	3	17/01/2018 11:21:02	17/01/2018 11:21:02		False				
Fernando Alonso	McLaren	4	17/01/2018 11:21:06	17/01/2018 11:21:06		False				
Felipe Massa	Williams	5	17/01/2018 11:21:16	17/01/2018 11:21:16		False				

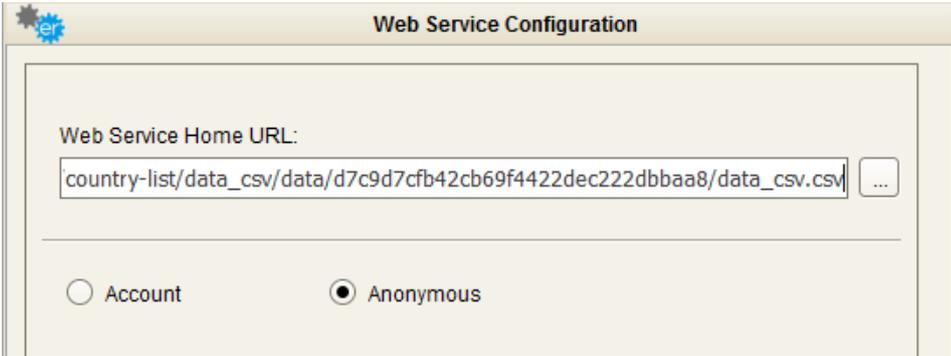
Pressing the  button stores all the entered parameters for the web service adapter in the DT database.

The  button closes the data preview window and goes back to Web Service configuration form.

### 1.2.11 Generic data provider - CSV

To use the adapter for a **generic http data provider**, fill the field “Web Service Home URL” with the URL to the data provider service, ex:

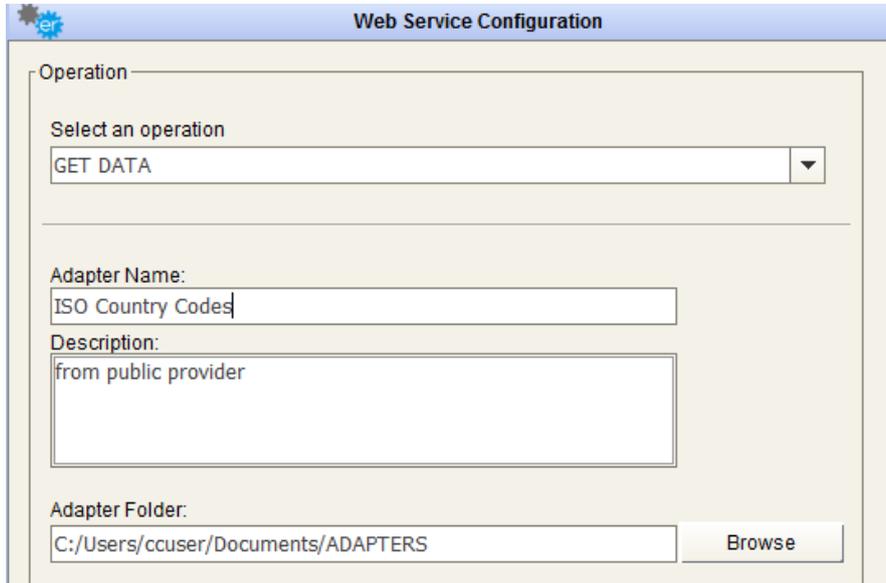
[https://pkgstore.datahub.io/core/country-list/data\\_csv/data/d7c9d7cfb42cb69f4422dec222dbbaa8/data\\_csv.csv](https://pkgstore.datahub.io/core/country-list/data_csv/data/d7c9d7cfb42cb69f4422dec222dbbaa8/data_csv.csv)



The screenshot shows the 'Web Service Configuration' dialog box. It has a title bar with a gear icon and the text 'Web Service Configuration'. Inside, there is a label 'Web Service Home URL:' followed by a text input field containing the URL 'country-list/data\_csv/data/d7c9d7cfb42cb69f4422dec222dbbaa8/data\_csv.csv' and a browse button '...'. Below the input field, there are two radio buttons: 'Account' (unselected) and 'Anonymous' (selected).

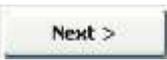
Then, provide a valid User/Password if service requires (basic) authentication, or select “Anonymous” access option

The  button steps into the next window that shows the available operation of that Web Service, which is “**GET DATA**”, allowing user to query web data.



The image shows a 'Web Service Configuration' dialog box. It has a title bar with a gear icon and the text 'Web Service Configuration'. Inside, there is a section titled 'Operation' with a dropdown menu showing 'GET DATA'. Below this are three input fields: 'Adapter Name' with the text 'ISO Country Codes', 'Description' with the text 'from public provider', and 'Adapter Folder' with the text 'C:/Users/ccuser/Documents/ADAPTERS' and a 'Browse' button to its right.

After selecting the desired operation, it is required to enter a name and a description for the adapter in the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to set values for the Web Service parameters.

When a lens icon shows beside the parameter name:

	<b>Encoding</b>	<b>ISO8859_1</b>
---	-----------------	------------------

this means that user may choose the parameter value from a list of available items. In case of this example, with the double-click on the lens icon, a table appears, with the available encoding:

Type	Attribute Name	Attribute Value
	Parameters	
	CSV separator	,
	<b>Encoding</b>	<b>ISO8859_1</b>

Field Values Preview

Adapter Preview:  
ISO Country Codes - Encoding

Name	Description
Cp850	Variant of Cp850 with Euro character
Cp437	MS-DOS United States, Australia, New Zealand, South Africa
Cp775	PC Baltic
Cp850	MS-DOS Latin-1
Cp852	MS-DOS Latin-2
Cp855	IBM Cyrilic
Cp857	IBM Turkish
Cp862	PC Hebrew
Cp866	MS-DOS Russian
ISO8859_1	ISO-8859-1, Latin Alphabet No. 1
ISO8859_2	Latin Alphabet No. 2
ISO8859_4	Latin Alphabet No. 4
ISO8859_5	Latin/Cyrilic Alphabet
ISO8859_7	Latin/Greek Alphabet (ISO-8859-7:2003)

Select and apply the selection, and the desired values for other fields, like the CSV column separator and parameters should the service require them.

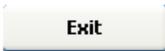
Pressing the **Test** button opens a new pop-up window and the response resulting from the Web Service call is displayed.

Adapter Preview

Adapter Preview:  
ISO Country Codes

Name	Code
Afghanistan	AF
Åland Islands	AX
Albania	AL
Algeria	DZ
American Samoa	AS
Andorra	AD
Angola	AO
Anguilla	AI
Antarctica	AQ
Antigua and Barbuda	AG
Argentina	AR
Armenia	AM
Aruba	AW
Australia	AU

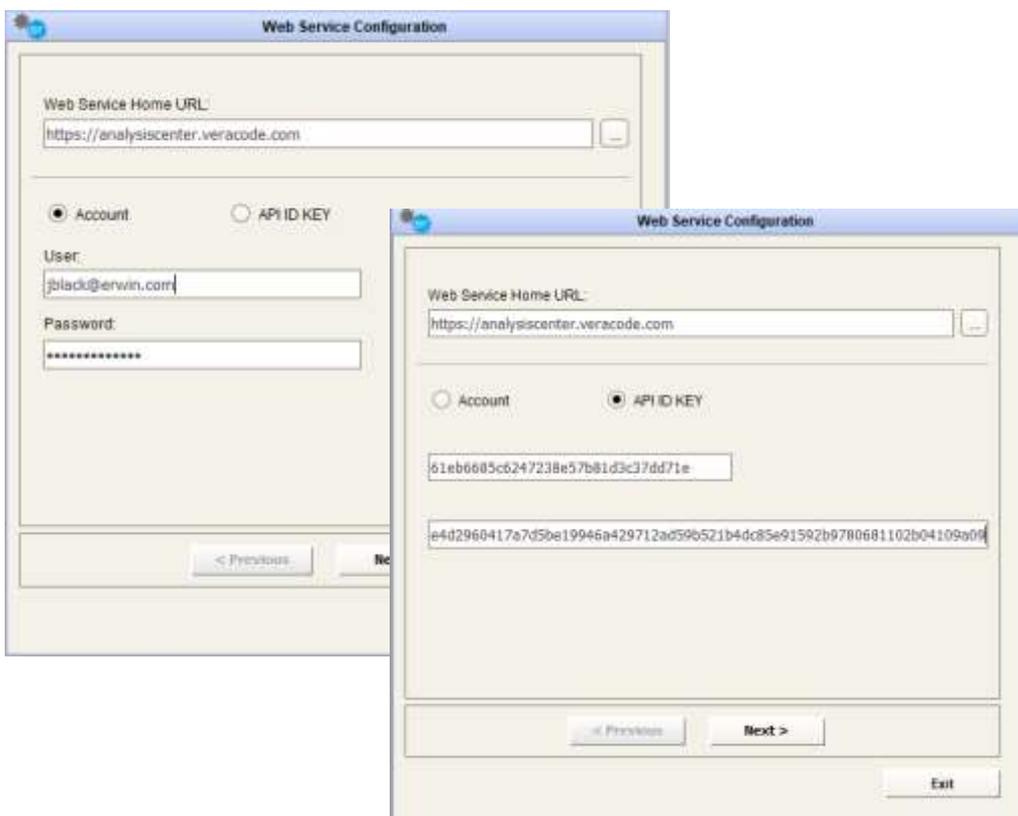
Pressing the  button stores all the entered parameters for the web service adapter in the DT database.

The  button closes the data preview window and goes back to Web Service configuration form.

## 1.2.12 Veracode – READ APPLICATION LIST

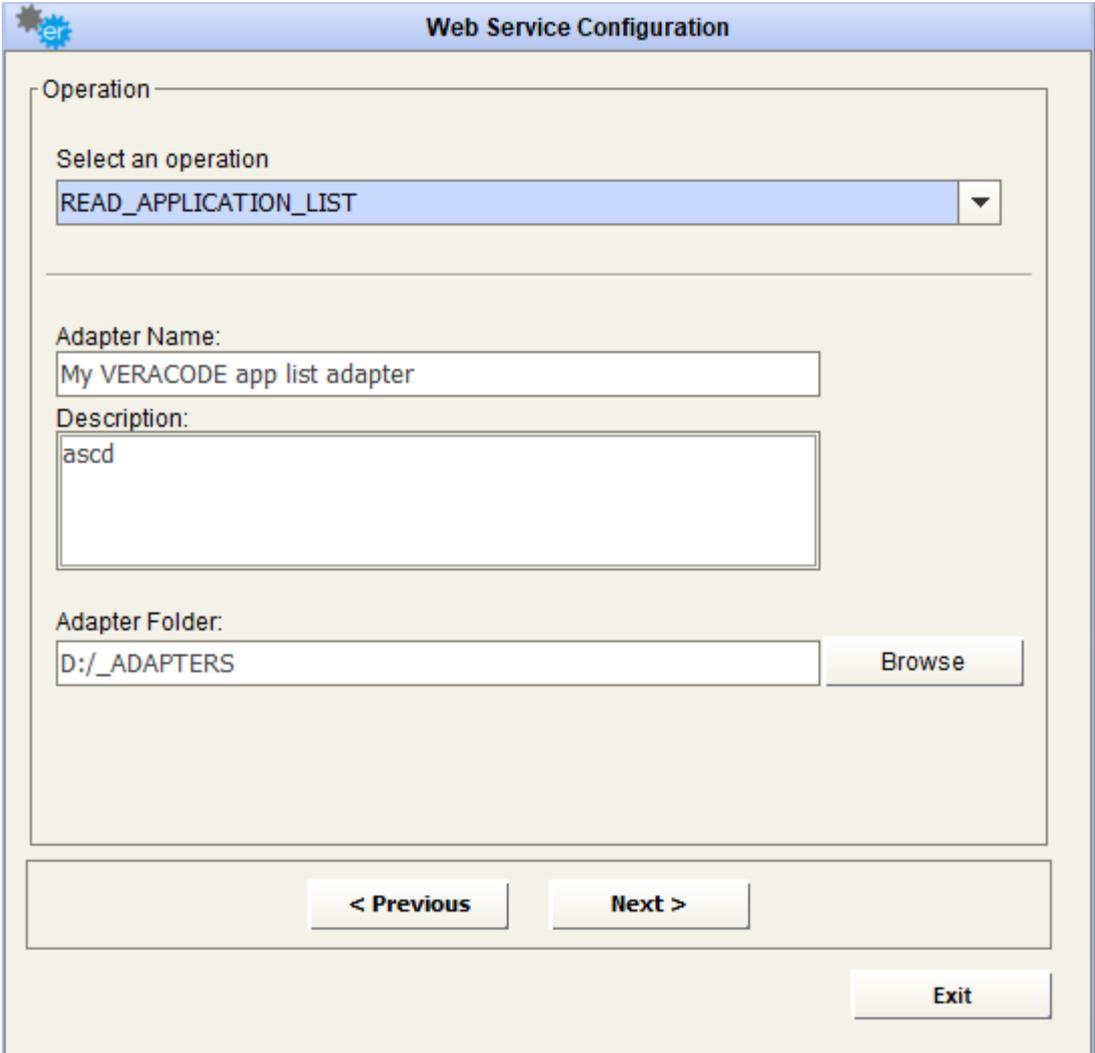
To use the adapter for Veracode, **to read application list**, fill the field “Web Service Home URL” with the Veracode URL you want to connect to. Then, provide a valid username/password to connect, or the API credentials (ID/KEY), that can be generated by a valid account. Please, make sure that the account has the correct permissions to use Veracode

API:  
[https://help.veracode.com/reader/LMv\\_dtSHyb7ilxAQznC~9w/2nDnsg\\_bBHfc2TPcl\\_Ps~KQ](https://help.veracode.com/reader/LMv_dtSHyb7ilxAQznC~9w/2nDnsg_bBHfc2TPcl_Ps~KQ)



---

The **Next >** button steps into the next window that shows the available operations of this Web Service; choose “**READ APPLICATION LIST**”, to get the list of application names and their Veracode ID.

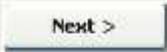


The image shows a dialog box titled "Web Service Configuration" with a gear icon in the top-left corner. The dialog is divided into several sections. The top section, labeled "Operation", contains a dropdown menu with "READ\_APPLICATION\_LIST" selected. Below this is a section for "Adapter Name:" with a text box containing "My VERACODE app list adapter". The "Description:" section has a text box containing "ascd". The "Adapter Folder:" section has a text box containing "D:/\_ADAPTERS" and a "Browse" button to its right. At the bottom of the dialog, there are three buttons: "< Previous", "Next >", and "Exit".

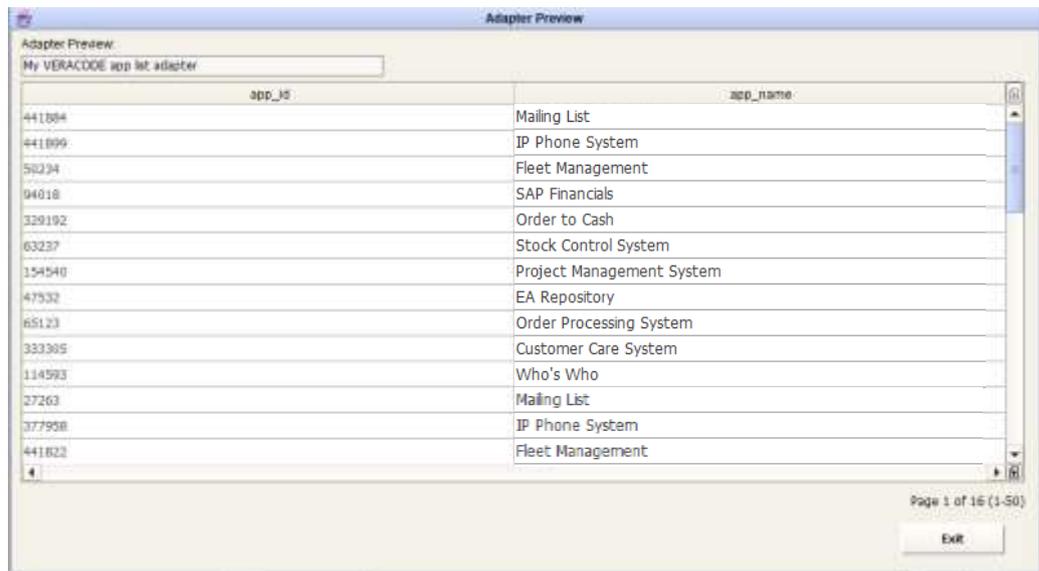
After selecting the desired operation, it is required to enter a name and a description for the adapter into the appropriate fields; the user must

---

browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to set values for the Web Service parameters, not required for this operation.

Pressing the  button and a pop-up window is opened and the response resulting from the Web Service call is displayed.



Pressing the  button will store all the entered parameters for the web service adapter in the DT database.

The  button closes the data preview window and goes back to the Web Service configuration form.

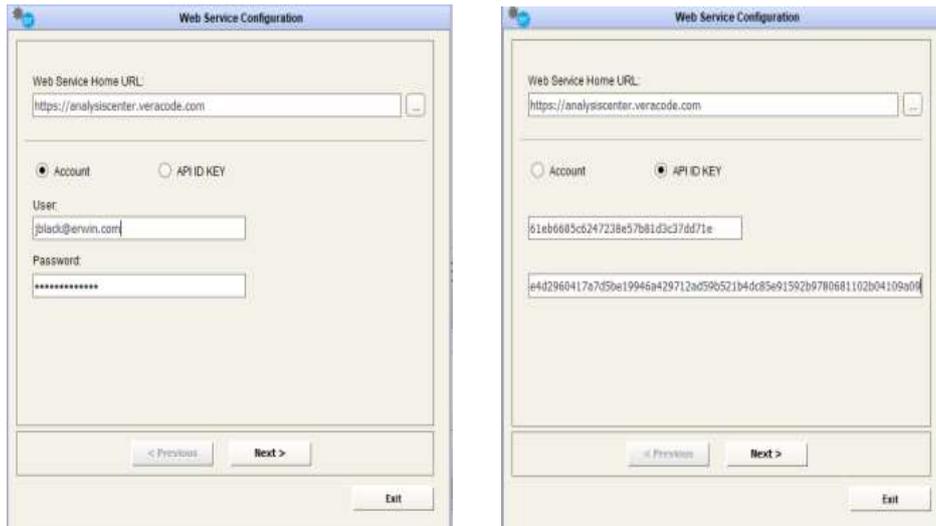
### 1.2.13 Veracode – IMPORT APPLICATION DATA

To use the adapter for Veracode, **to import application data**, fill the field "Web Service Home URL" with the Veracode URL you want to connect to. Then, provide a valid username/password to connect, or the API credentials (ID/KEY), that can be generated by a valid account. Please, make sure that the account has the correct permissions to use

Veracode

API:

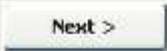
[https://help.veracode.com/reader/LMv\\_dtSHyb7ilxAQznC~9w/2nDnsg\\_bBHfc2TPcl\\_Ps~KQ](https://help.veracode.com/reader/LMv_dtSHyb7ilxAQznC~9w/2nDnsg_bBHfc2TPcl_Ps~KQ)



The **Next >** button steps into the next window that shows the available operations of this Web Service; choose **“IMPORT APPLICATION DATA”**, to configure an adapter that can be used in a workflow to push application metadata to Veracode (see later).



After selecting the desired operation, it is required to enter a name and a description for the adapter in the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

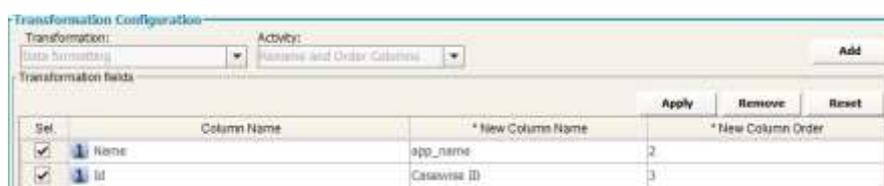
The next button  steps into the next window that allows the user to set values for the Web Service parameters, not required for this operation.



Pressing the  button will store all the entered parameters for the web service adapter in the DT database.

The  button closes the data preview window and goes back to Web Service configuration form.

The Adapter, as mentioned, can be used to push data to Veracode and fill applications metadata. For example, if the application object type in Veracode has two custom fields named “Casewise ID” and “Development Manager”, the alignment can be done configuring a workflow, with a source providing values for the fields, and with the target operation “Web Service POST”, using the configured adapter. To provide mappings between source and target field, use a “Data Formatting: Rename and Order Columns” transformation, with the required “**app\_id**” and “**app\_name**” fields, and all others desired fields. Where “**app\_id**” (numeric) value is **null** or **0**, the application with



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provided name will be created, or updated, if an existing Veracode application with the same name already exists.

### 1.2.14 Zendesk – Get Tickets

To use the adapter for Zendesk **to get tickets**, select the authorization method (Account / Access Token) and enter the relevant credentials.



Click the **Next >** button to proceed to the next step, and select the operation “Get Tickets”. Enter a name and folder for the adapter, and select the view from which to retrieve tickets. A description can also optionally be entered for the adapter.

The dialog box is titled "Web Service Configuration". It contains the following fields and controls:

- Operation:** A dropdown menu with "Get Tickets" selected.
- Adapter Name:** A text box containing "Example Zendesk Adapter".
- Description:** A text box containing "The description is optional."
- Adapter Folder:** A text box containing "C:\Test Data" and a "Browse" button.
- Test View:** A dropdown menu with "Test View" selected.
- Navigation:** "< Previous" and "Next >" buttons.
- Exit:** An "Exit" button.

Click the **Next >** button to proceed to the next step, where the adapter can be previewed and/or saved.

The dialog box is titled "Web Service Configuration". It contains the following fields and controls:

- Table:** A table with columns "Type", "Attribute Name", and "Attribute Value". The first row is highlighted and contains "Tickets".
- Name:** A text box containing "Tickets".
- Value(s):** A large text area for entering values.
- Enter:** A button next to the "Value(s)" text area.
- Navigation:** "< Previous", "Test", and "Save" buttons.
- Exit:** An "Exit" button.

To preview a sample of the first 50 results, click the **Test** button.





The dialog box is titled "Web Service Configuration". It contains the following fields and controls:

- Operation:** A dropdown menu with "Create Tickets" selected.
- Adapter Name:** A text box containing "Exemple Zendesk Adapter".
- Description:** A text box containing "This description is optional".
- Adapter Folder:** A text box containing "C:\Test Data" and a "Browse" button.
- Navigation:** "< Previous" and "Next >" buttons.
- Exit:** An "Exit" button.

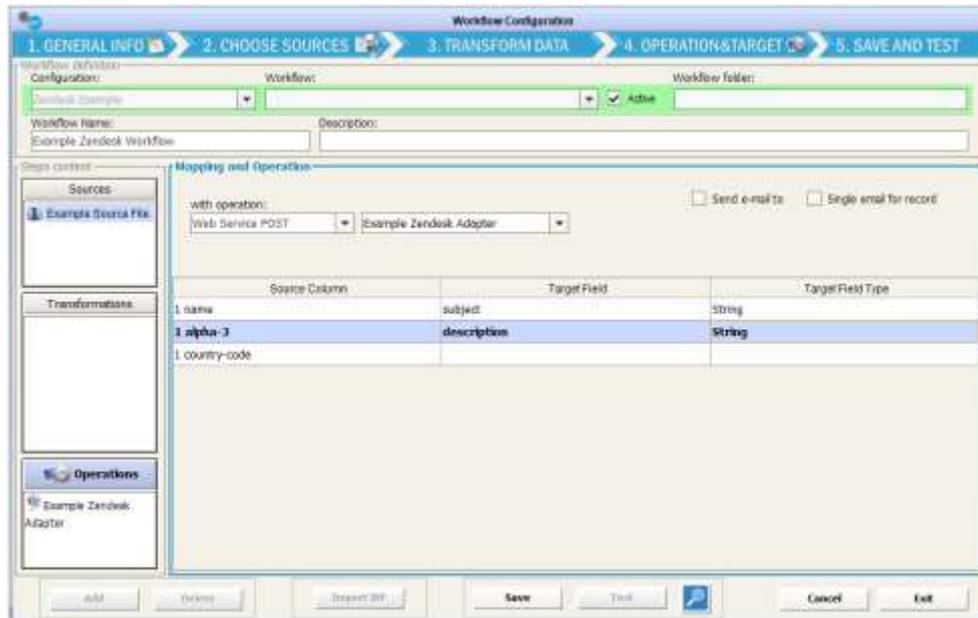
Click the **Next >** button to proceed to the next step. To save the adapter to the DT database, click the **SAVE** button.

The dialog box is titled "Web Service Configuration". It contains the following fields and controls:

- Table:** A table with columns "Type", "Attribute Name", and "Attribute Value". The first row is highlighted and contains "Tickets".
- Name:** A text box containing "Tickets".
- Value(s):** A large text area for input.
- Enter:** A button next to the "Value(s)" text area.
- Navigation:** "< Previous", "Test", and "Save" buttons.
- Exit:** An "Exit" button.

The adapter can now be used as a target endpoint when mapping data in a workflow. To select the adapter as a target, select "Web Service POST" as the operation and select your Zendesk adapter. A mapping

table will appear, allowing the source fields to be mapped to relevant target fields for creating Zendesk tickets.



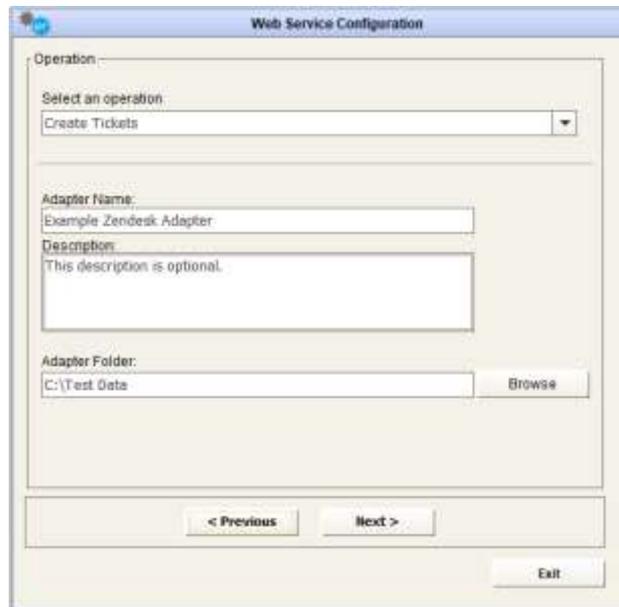
### 1.2.16 Zendesk – Update Tickets

To use the adapter for Zendesk **to update existing tickets**, select the authorization method (Account / Access Token) and enter the relevant credentials.



---

Click the **Next >** button to proceed to the next step, and select the operation “Update Tickets”. Enter a name and folder for the adapter. A description can also optionally be entered for the adapter.



Web Service Configuration

Operation:

Select an operation:

Create Tickets

Adapter Name:

Example Zendesk Adapter

Description:

This description is optional.

Adapter Folder:

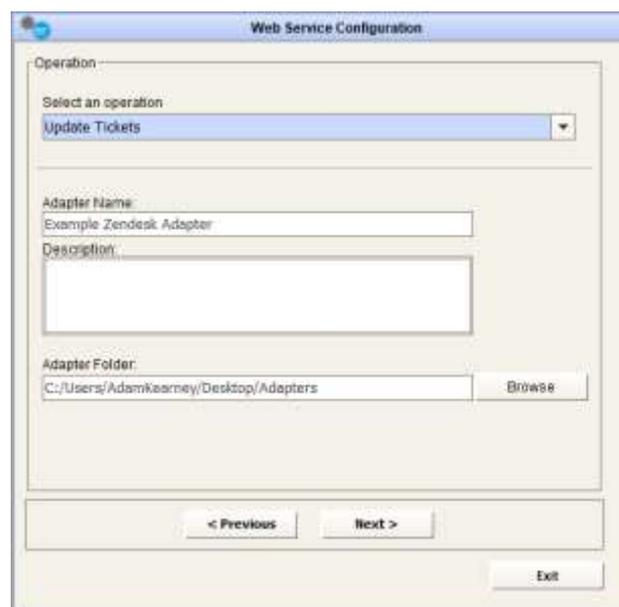
C:\Test Data

Browse

< Previous    Next >

Exit

Click the **Next >** button to proceed to the next step. To save the adapter to the DT database, click the **SAVE** button.



Web Service Configuration

Operation:

Select an operation:

Update Tickets

Adapter Name:

Example Zendesk Adapter

Description:

Adapter Folder:

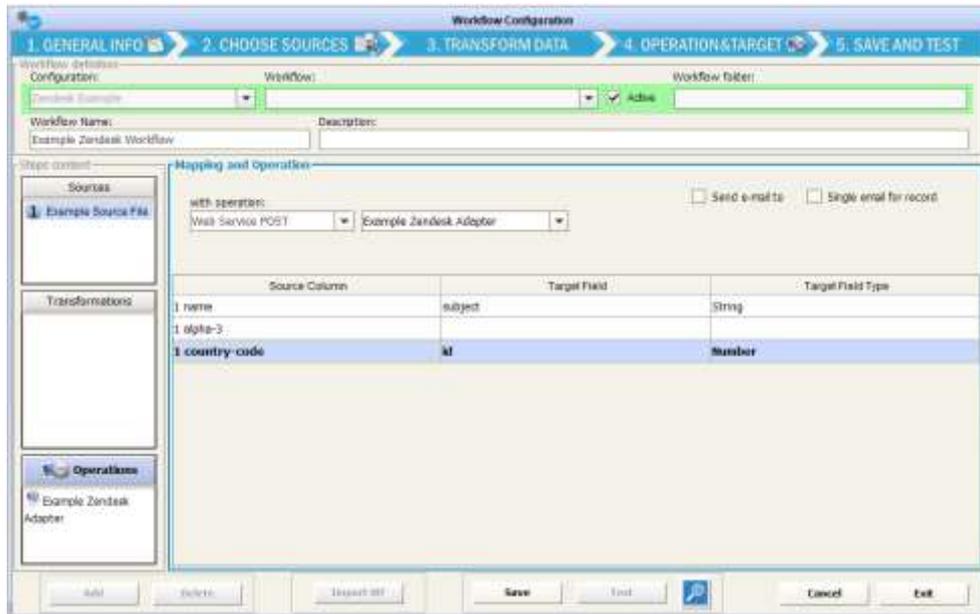
C:/Users/AdamKearney/Desktop/Adapters

Browse

< Previous    Next >

Exit

The adapter can now be used as a target endpoint when mapping data in a workflow. To select the adapter as a target, select “Web Service POST” as the operation and select your Zendesk adapter. A mapping table will appear, allowing the source fields to be mapped to relevant target fields for updating Zendesk tickets (using the id as a key).



### 1.2.17 CloudHealth – READ PERSPECTIVE GROUPS

To use the adapter for CloudHealth, **to read perspective groups**, fill the field “Web Service Home URL” with the CloudHealth URL you want to connect to. Then, provide a valid username/password to connect, or the API credentials (API Key), that can be generated by a valid account. Please, make sure that the account has the correct permissions to use CloudHealth API: [http://apidocs.cloudhealthtech.com/#documentation\\_getting-your-api-key](http://apidocs.cloudhealthtech.com/#documentation_getting-your-api-key)

## SETTINGS

### API Access

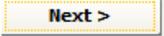


Web Service Configuration

Web Service Home URL:  
https://apps.cloudhealthtech.com

API Key

API Key:  
a573862e-bcab-63ac-bcc7-2a04cbaca12b

The  button steps into the next window that shows the available operations of this Web Service; choose “**READ PERSPECTIVE GROUPS**”, to get the list of groups in the desired perspective.

**Web Service Configuration**

Operation

Select an operation

READ\_PERSPECTIVE\_GROUPS

Adapter Name:

CH - Read Application Name perspective

Description:

Adapter Folder:

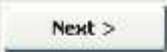
C:/Users/Administrator/Documents/DTAdapter

Browse

< Previous      Next >

Exit

After selecting the desired operation, it is required to enter a name and a description for the adapter into the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button  steps into the next window that allows the user to set values for the Web Service parameters.

When a lens icon shows beside the parameter name:

**Web Service Configuration**

Type	Attribute Name	Attribute Value
	<b>Perspective ID</b>	

this means that user may choose the parameter value from a list of available items. In case of this example, with the double-click on the lens icon, a table appears, with the available perspectives:

The screenshot shows a window titled "Field Values Preview" with a sub-header "Adapter Preview:". Below this, there is a text input field containing "CH - Read Application Name perspective - Perspective ID:". The main content is a table with three columns: "Perspective Name", "Perspective Id", and "Active". The table lists various perspectives such as "Email", "Matrix", "RES Matrix MLS Application", "Account", "test", "Environment", "Platform", "Application", "Data Center Migration", "BU", "Account ID", "blank for tagging", "internationalteam", and "CH - Tagging". Each row includes a corresponding Perspective ID and an Active status (true or false). At the bottom right, there are "Apply" and "Exit" buttons, and a page indicator "Page 1 of 1 (1-36)".

Perspective Name	Perspective Id	Active
Email	1099511682435	false
Matrix	1099512084097	false
RES Matrix MLS Application	1099512084099	false
Account	3710851744917	true
test	3710851744953	false
Environment	3710851744966	true
Platform	3710851744972	true
Application	3710851744973	true
Data Center Migration	3710851744977	true
BU	3710851744996	true
Account ID	3710851744999	true
blank for tagging	3710851745002	false
internationalteam	3710851745007	true
CH - Tagging	3710851745008	false

Select and apply the selection:

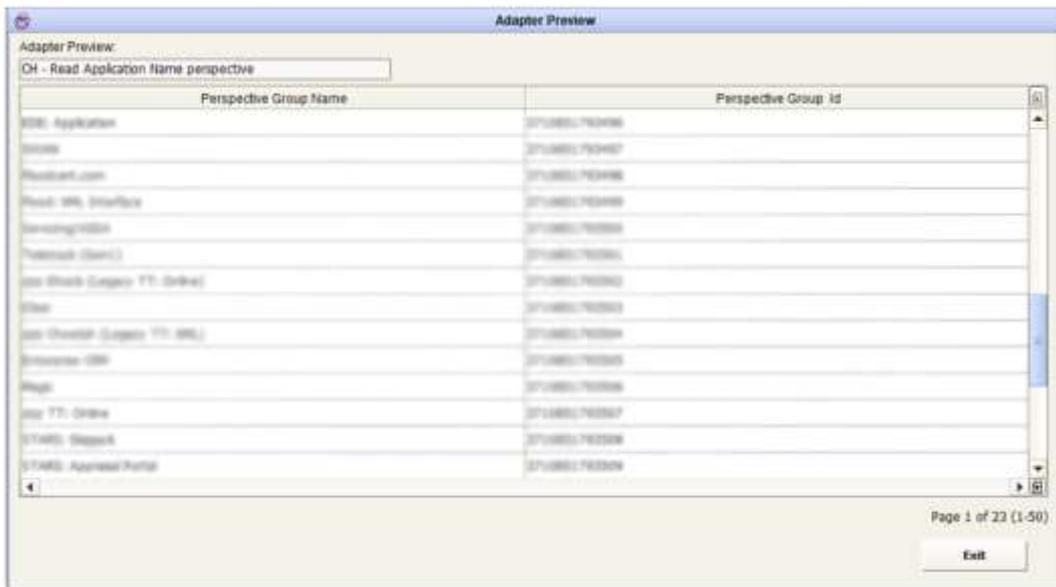
The screenshot shows a window titled "Web Service Configuration" with a gear icon in the top left. It contains a table with three columns: "Type", "Attribute Name", and "Attribute Value". The first row is highlighted in blue and contains a magnifying glass icon in the "Type" column, "Perspective ID" in the "Attribute Name" column, and "3710871253012" in the "Attribute Value" column.

Type	Attribute Name	Attribute Value
	<b>Perspective ID</b>	<b>3710871253012</b>

Pressing the button opens a new pop-up window and the response resulting from the Web Service call is displayed, with the name and ref\_id of existing groups. These values can be stored in EA model object to manage groups creation and update, based on CH identifier (see after).

Pressing the button will store all the entered parameters for the web service adapter in the DT database.

The button closes the data preview window and goes back to the Web Service configuration form.



## 1.2.18 CloudHealth – UPDATE PERSPECTIVE

To use the adapter for CloudHealth, **to update perspective**, fill the field “Web Service Home URL” with the CloudHealth URL you want to connect to. Then, provide a valid username/password to connect, or the API credentials (API Key), that can be generated by a valid account. Please, make sure that the account has the correct permissions to use CloudHealth API: [http://apidocs.cloudhealthtech.com/#documentation\\_getting-your-api-key](http://apidocs.cloudhealthtech.com/#documentation_getting-your-api-key)

### SETTINGS

#### API Access

**Web Service Configuration**

Web Service Home URL:

API Key

API Key:

The “Next” button steps into the next window that shows the available operations of this Web Service; choose “UPDATE PERSPECTIVE”, to push groups to the desired perspective in CloudHealth.

The screenshot shows a window titled "Web Service Configuration" with a gear icon in the top left. The main area is labeled "Operation" and contains a dropdown menu with "UPDATE\_PERSPECTIVE" selected. Below this are three input fields: "Adapter Name" with the text "CH - Update Application Ecosystem", "Description" with the text "update perspective \"Application Ecosystem\"", and "Adapter Folder" with the text "D:/DT\_ADAPTERS" and a "Browse" button to its right. At the bottom of the window are two buttons: "< Previous" and "Next >".

After selecting the desired operation, it is required to enter a name and a description for the adapter into the appropriate fields; the user must browse the file system for the adapter folder (used to save intermediate and result file for adapter execution).

The next button steps into the next window that allows the user to set values for the Web Service parameters.

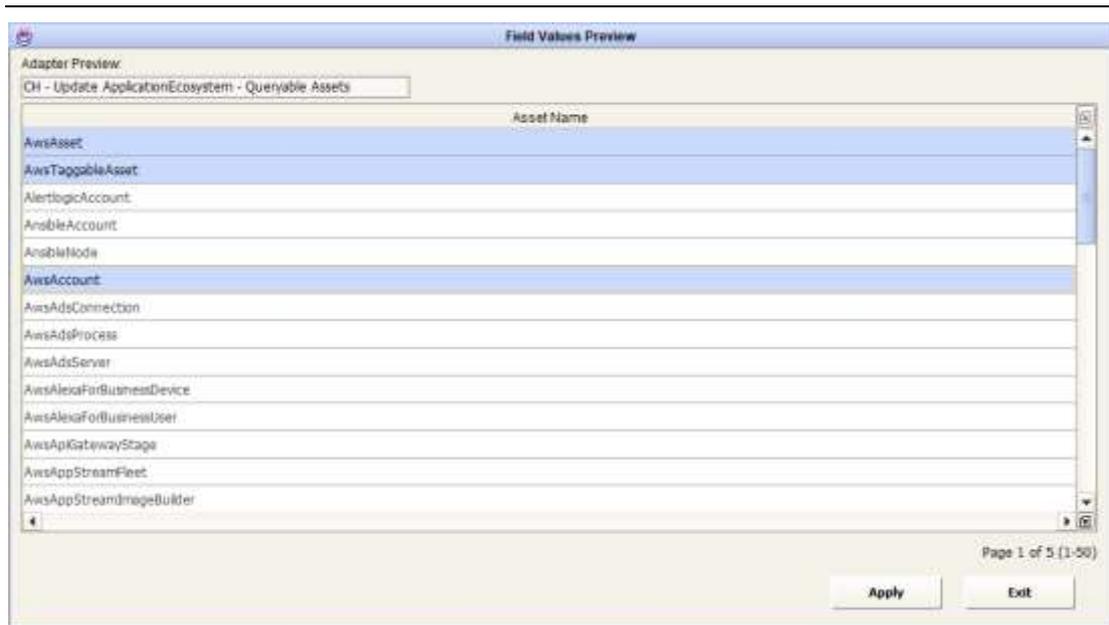
Type	Attribute Name	Attribute Value
	<b>Perspective ID</b>	
	Queryable Assets	

When a lens icon shows beside the parameter name, this means that user may choose the parameter value from a list of available items.

In case of this example, with the double-click on the lens icon, a table appears, with the available perspectives:

Perspective Name	Perspective Id	Active
Email	1099511682435	false
Matrix	1099512084097	false
RES Matrix MLS Application	1099512084099	false
Account	3710851744917	true
test	3710851744953	false
Environment	3710851744966	true
Platform	3710851744972	true
Application	3710851744973	true
Data Center Migration	3710851744977	true
BU	3710851744996	true
Account ID	3710851744999	true
blank for tagging	3710851745002	false
clnternational-team	3710851745007	true
CH - Tagging	3710851745008	false

and Queryable assets:



Select and apply the selection, even using multiselection in case of queryable assets:



Pressing the “Save” button will store all the entered parameters for the web service adapter in the DT database.

The “Exit” button closes the data preview window and goes back to the Web Service configuration form.

The Adapter, as mentioned, can be used to push data to CloudHealth and fill perspective groups. Based on an asset tag (for instance, application ID), corresponding metadata associated with the application ID will be pushed to CloudHealth in the form of perspectives and groups.

As an example, the perspective listing an Application Ecosystem and their associated applications can be aligned configuring a workflow, with a source providing values for application ecosystems name and associated application ID, and with the target operation “Web Service POST”, using the configured adapter. To provide mappings between source and target field, use a “Data Formatting: Rename and Order Columns” transformation, with the mandatory “Name” field for the perspective groups, the optional “ref\_id” field to manage

object renaming and additional fields name corresponding to tag fields to populate:

**Transformation Configuration**

Transformation: Data formatting      Activity: Rename and Order Columns      Add

Transformation fields

Sel.	Column Name	* New Column Name	* New Column Order
<input checked="" type="checkbox"/>	1 <Application Ecosystem> Name	Name	1
<input checked="" type="checkbox"/>	1 <Application Ecosystem> CH_ref_id	ref_id	2
<input checked="" type="checkbox"/>	1 <IT: Application> Unique Id	CasewiseAppID	3

Apply    Remove    Reset

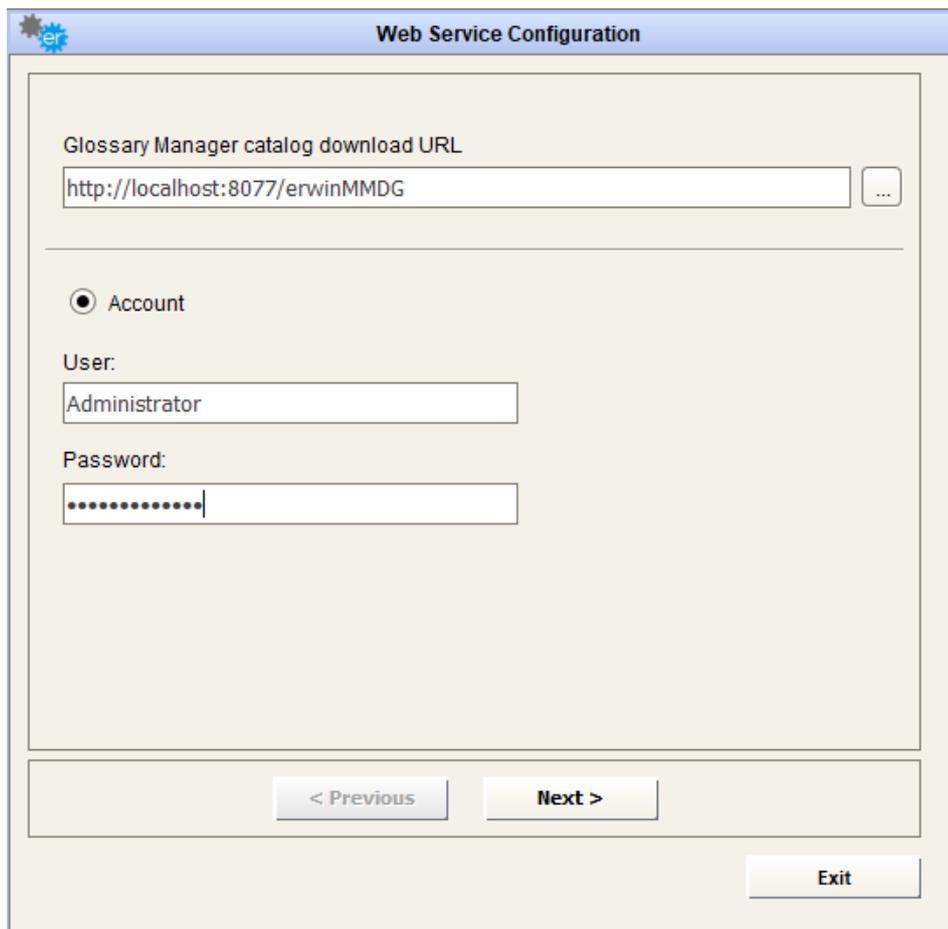
**Mapping and Operation**

with operation:

Web Service POST    CH - Update ApplicationEcosystem

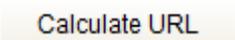
### 1.2.19 Business Terms from BGM – Download Business Terms

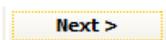
To use the adapter for BGM to **get Business Terms**, select the authorization method (Account / Access Token) and enter the relevant credentials.

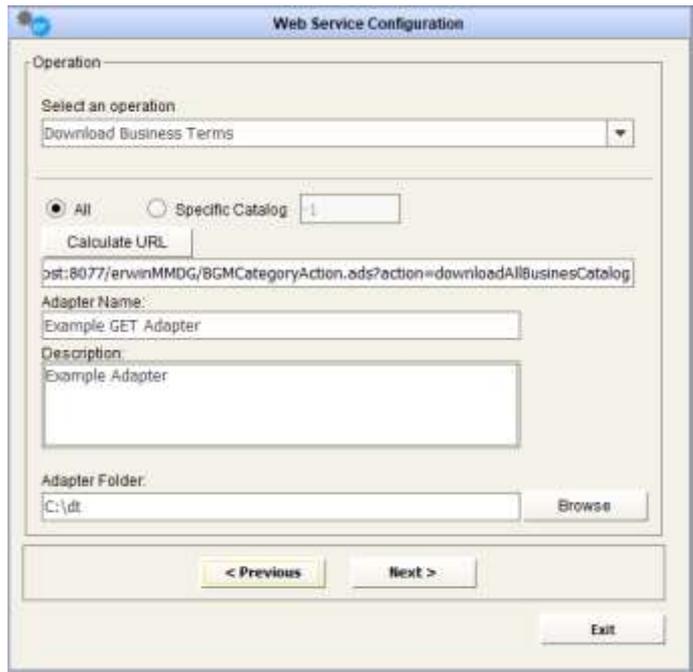


The image shows a 'Web Service Configuration' dialog box with a blue title bar and a gear icon. The main area is light beige and contains the following elements:

- A label 'Glossary Manager catalog download URL' above a text input field containing 'http://localhost:8077/erwinMMDG' and a browse button '...'.
- A horizontal separator line.
- A radio button labeled 'Account' which is selected.
- A label 'User:' above a text input field containing 'Administrator'.
- A label 'Password:' above a text input field containing ten dots.
- A bottom section with three buttons: '< Previous', 'Next >', and 'Exit'.

Click the  button to proceed to the next step, and select the operation "Download Business Terms". Specify the specific Catalog ID or select "All" and click the  button. Enter a name and folder for the adapter. A description can also optionally be entered for the adapter.

Click the  button to proceed to the next step. To save the adapter to the DT database, click the  button.



Click the  button to proceed to the next step, where the adapter can be previewed and/or saved.



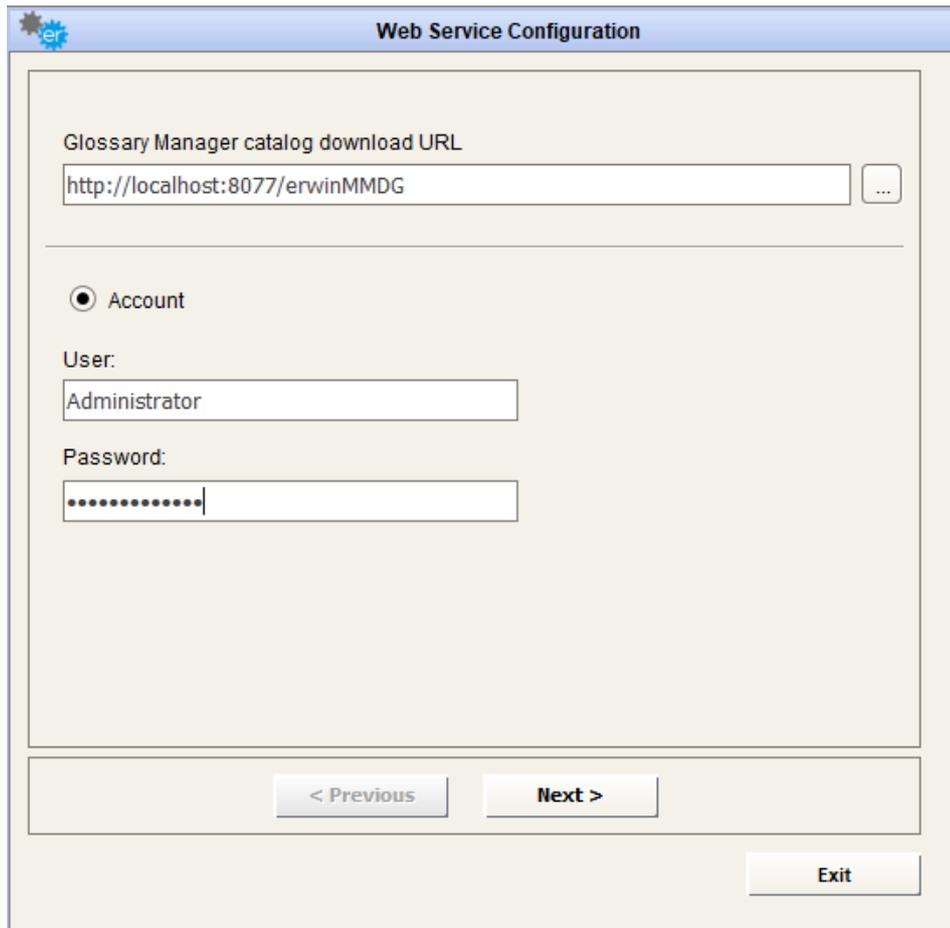
To preview a sample of the first 50 results, click the  button.



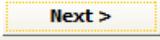
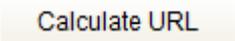
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## 1.2.20 Business Terms from BGM – Upload Business Terms

To use the adapter for BGM **to get Business Terms**, select the authorization method (Account / Access Token) and enter the relevant credentials.



The image shows a 'Web Service Configuration' dialog box. It has a title bar with a gear icon and the text 'Web Service Configuration'. The main area contains a text box for 'Glossary Manager catalog download URL' with the value 'http://localhost:8077/erwinMMDG' and a browse button (...). Below this is a radio button labeled 'Account' which is selected. Underneath are two text boxes: 'User:' containing 'Administrator' and 'Password:' containing a series of dots. At the bottom, there are three buttons: '< Previous', 'Next >', and 'Exit'.

Click the  button to proceed to the next step, and select the operation "Upload Business Terms". Specify the a specific Catalog ID or select "All" and click the  button. Enter a name and folder for the adapter. A description can also optionally be entered for the adapter.

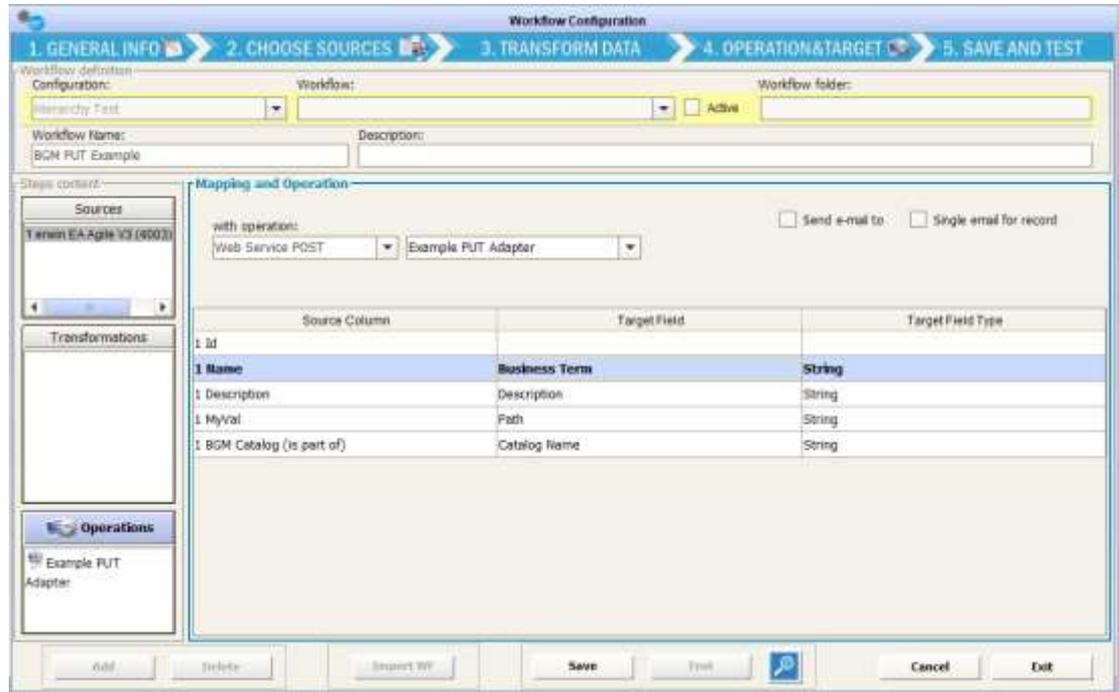
The image shows a 'Web Service Configuration' dialog box. At the top, it says 'Operation'. Below that, there is a dropdown menu with 'Upload Business Terms' selected. Underneath, there are two radio buttons: 'All' (which is selected) and 'Specific Catalog' with a text box containing '-1'. A 'Calculate URL' button is present, and below it, a text box contains the URL: 'IDG/BusinessGlossaryAction.ads?action=ImportCatvalidation&globalCategoryId=-1'. There are two text boxes: 'Adapter Name:' with 'Example PUT Adapter' and 'Description:' with 'Example PUT Adapter'. At the bottom of the configuration area, there is an 'Adapter Folder:' text box with 'C:\dt' and a 'Browse' button. At the very bottom of the dialog, there are three buttons: '< Previous', 'Next >', and 'Exit'.

Click the **Next >** button to proceed to the next step. To save the adapter to the DT database, click the **SAVE** button.

The image shows the 'Web Service Configuration' dialog box at a later stage. It features a table with three columns: 'Type', 'Attribute Name', and 'Attribute Value'. Below the table, there is a 'Name:' label and a 'Value(s):' text box. To the right of the text box is an 'Enter' button. At the bottom of the dialog, there are four buttons: '< Previous', 'Test', 'Save', and 'Exit'.

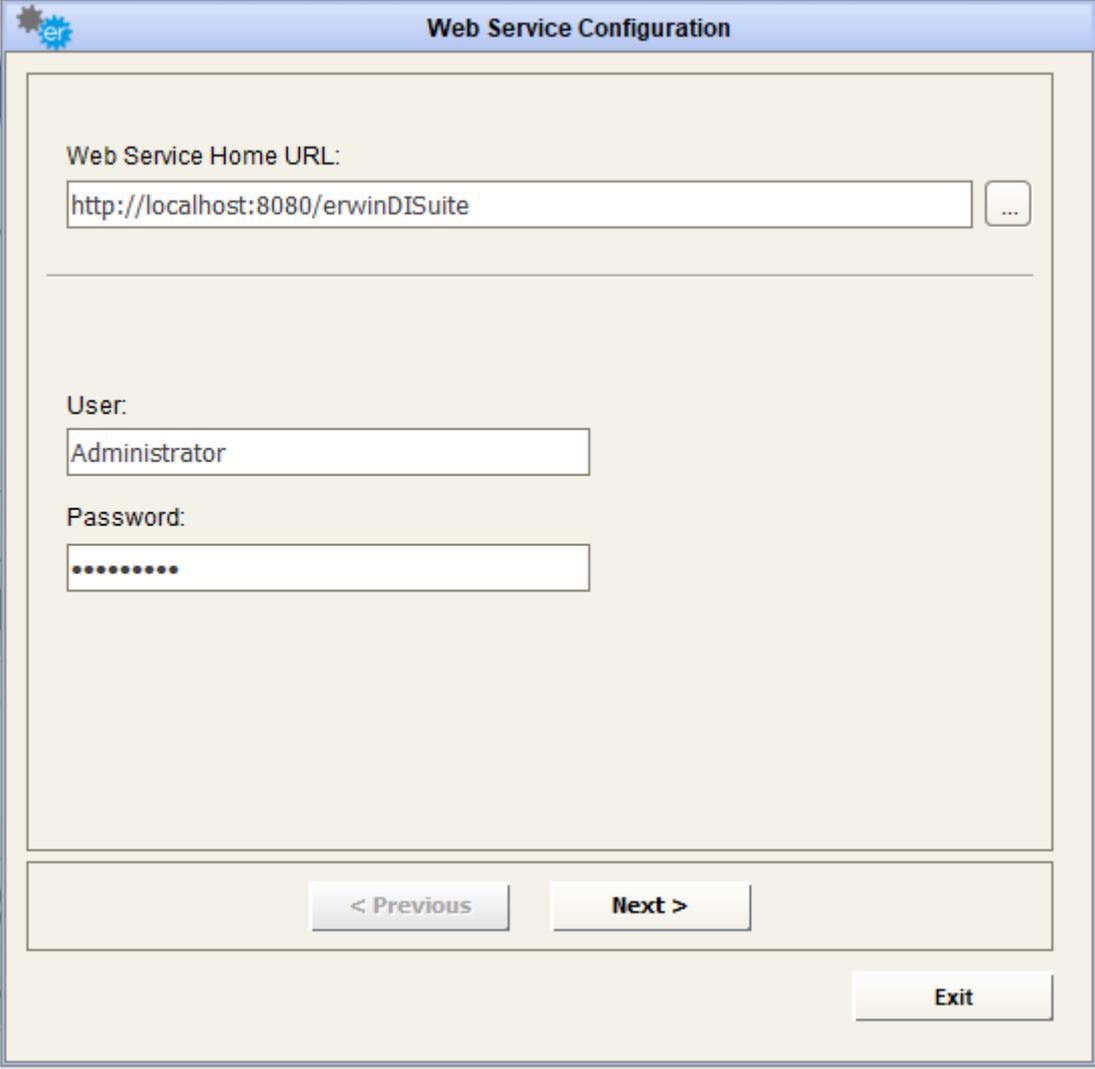
The adapter can now be used as a target endpoint when mapping data in a workflow. To select the adapter as a target, select “Web Service POST” as the operation and select your BGM adapter. A mapping

table will appear, allowing the source fields to be mapped to relevant target fields for creating BGM Business Terms.



## 1.2.21 erwin DISuite Metadata Manager

To use the adapter for erwin DISuite Metadata Manager **to download Data Dictionary**, provide the url of erwin DISuite and enter the relevant credentials



The image shows a 'Web Service Configuration' dialog box with a light blue title bar and a gear icon. The main area is a light beige panel containing three input fields. The first field is labeled 'Web Service Home URL:' and contains the text 'http://localhost:8080/erwinDISuite'. The second field is labeled 'User:' and contains the text 'Administrator'. The third field is labeled 'Password:' and contains a series of dots. At the bottom of the dialog, there are three buttons: '< Previous', 'Next >', and 'Exit'.

Web Service Home URL:

User:

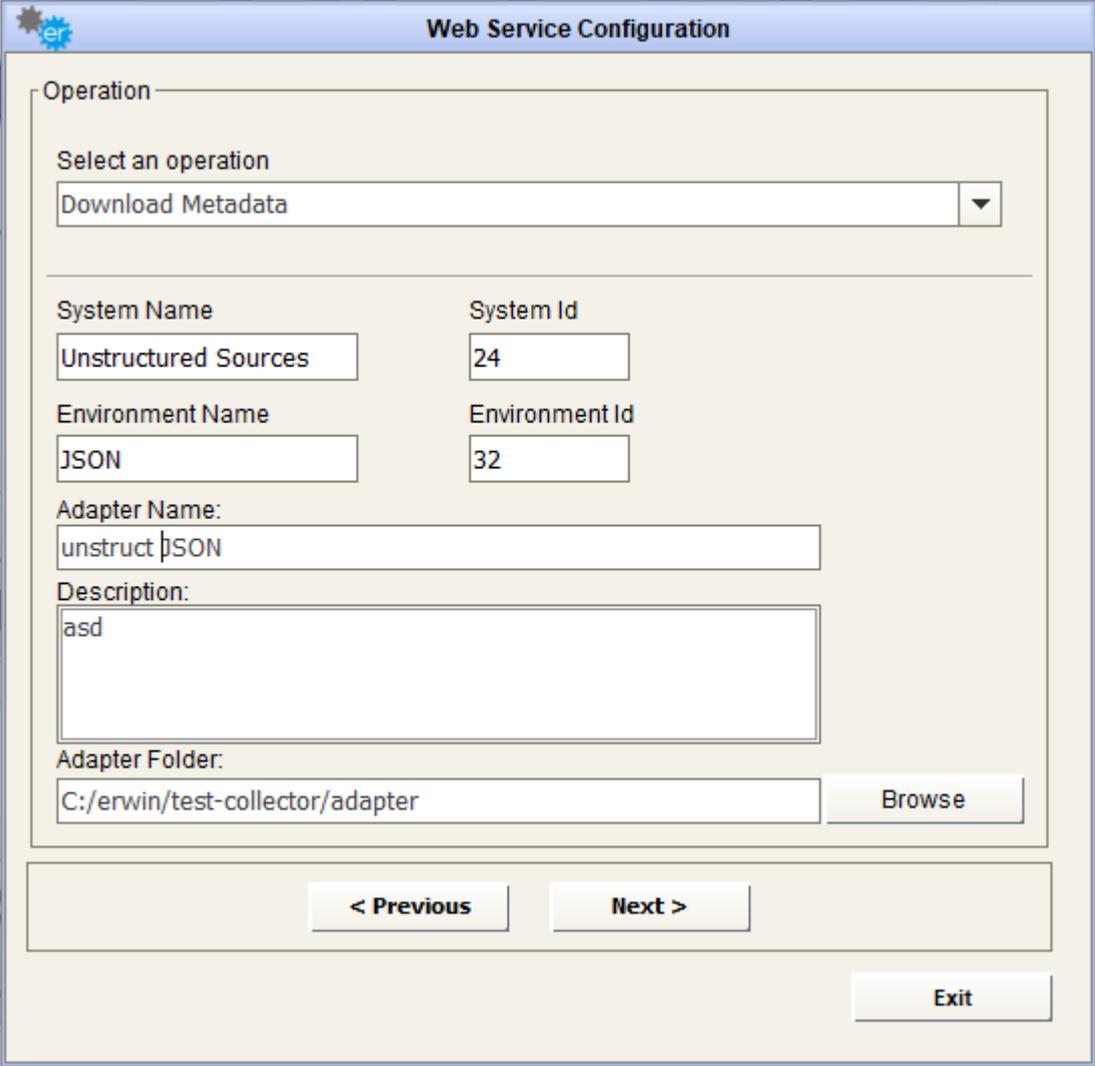
Password:

< Previous      Next >      Exit

Click the **Next >** button to proceed to the next step, and select the operation "Download Metadata".

Provide the "System Name", "System Id", "Environment Name", "Environment Id" in their respective edit box.

Enter a name and folder for the adapter. A description can also optionally be entered for the adapter.

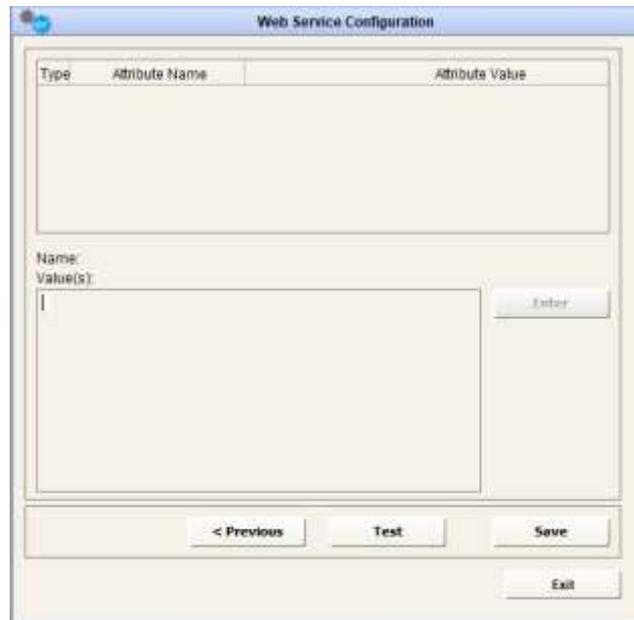


The image shows a "Web Service Configuration" dialog box with the following fields and controls:

- Operation:** A dropdown menu with "Download Metadata" selected.
- System Name:** Text box containing "Unstructured Sources".
- System Id:** Text box containing "24".
- Environment Name:** Text box containing "JSON".
- Environment Id:** Text box containing "32".
- Adapter Name:** Text box containing "unstruct JSON".
- Description:** Text area containing "asd".
- Adapter Folder:** Text box containing "C:/erwin/test-collector/adapter" and a "Browse" button.
- Navigation:** "< Previous" and "Next >" buttons.
- Exit:** "Exit" button.

---

Click the **Next >** button to proceed to the next step, where the adapter can be previewed and/or saved.



The image shows a 'Web Service Configuration' dialog box. It features a table with three columns: 'Type', 'Attribute Name', and 'Attribute Value'. Below the table, there is a 'Name:' label and a 'Value(s):' text area with an 'Enter' button to its right. At the bottom of the dialog, there are four buttons: '< Previous', 'Test', 'Save', and 'Exit'.

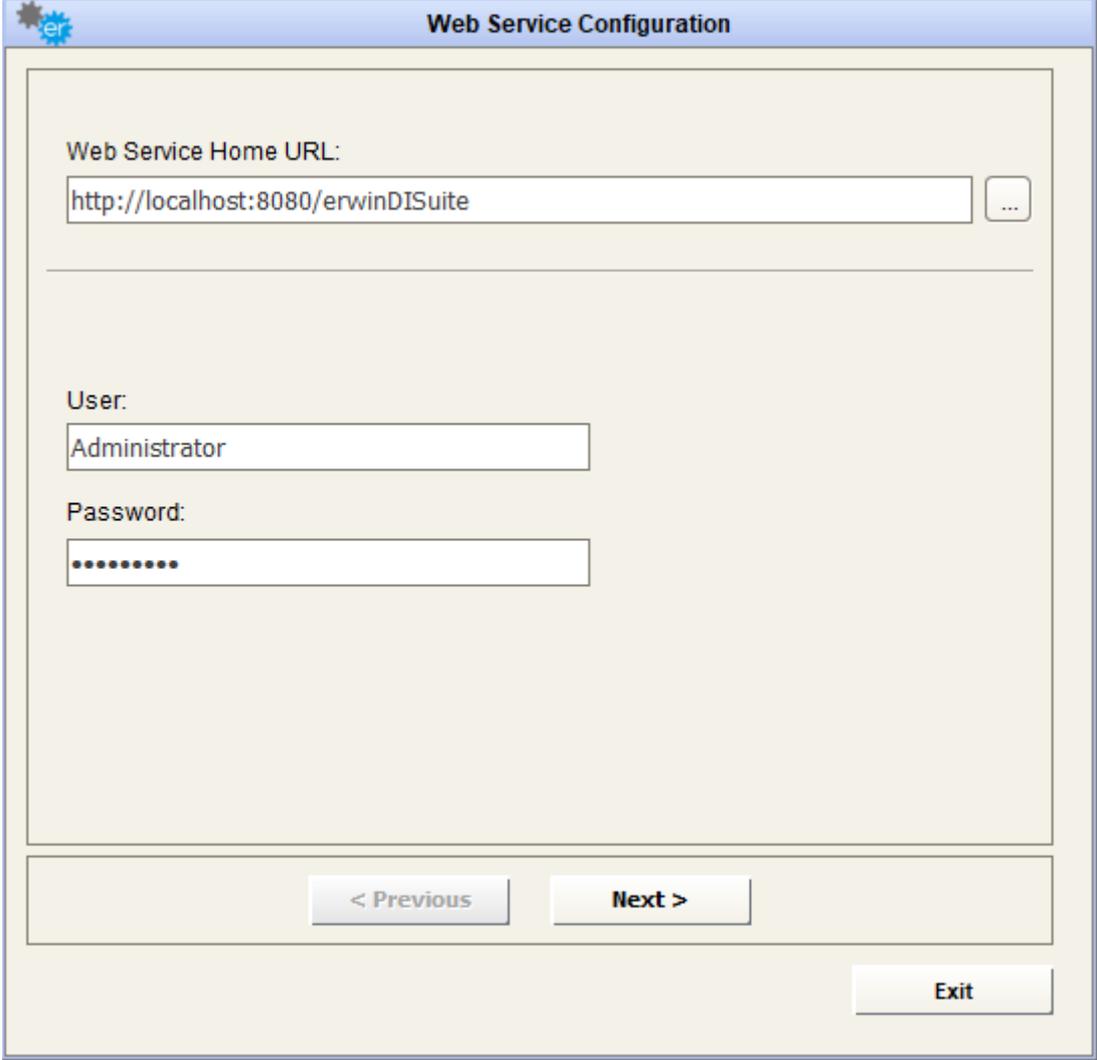
To preview a sample of the first 50 results, click the **Test** button

To save the adapter to the DT database, click the **SAVE** button.

---

### 1.2.22 erwin DISuite Mapping Manager

To use the adapter for erwin DISuite Mapping Manager **to download Mappings**, provide the url of erwin DISuite and enter the relevant credentials

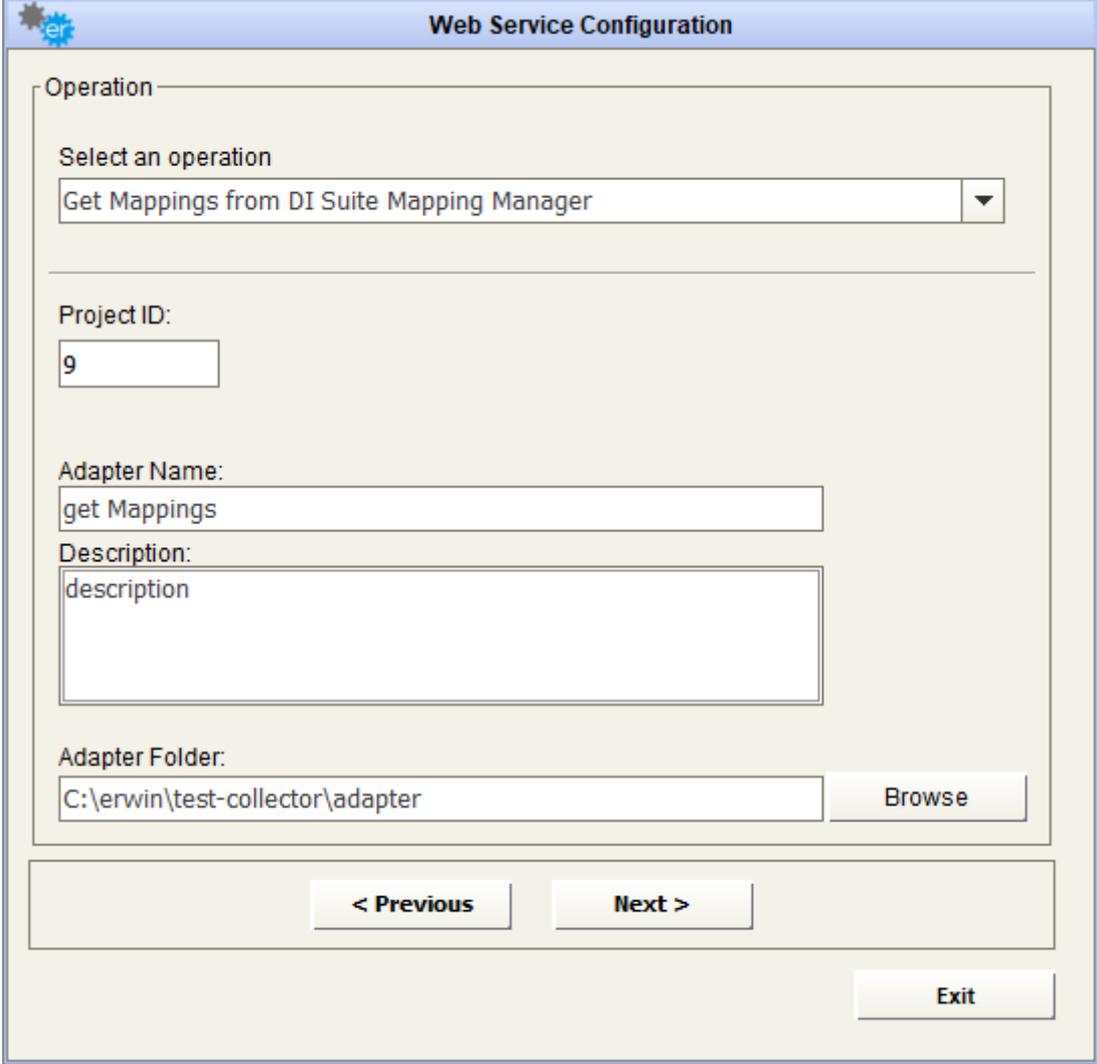


The image shows a 'Web Service Configuration' dialog box with a blue header bar containing the erwin logo. The main area is light beige and contains three input fields. The first field is labeled 'Web Service Home URL:' and contains the text 'http://localhost:8080/erwinDISuite' with a small '...' button to its right. Below this is a horizontal separator line. The second field is labeled 'User:' and contains the text 'Administrator'. The third field is labeled 'Password:' and contains a series of ten black dots. At the bottom of the dialog, there are three buttons: '< Previous' on the left, 'Next >' in the center, and 'Exit' on the right.

Click the **Next >** button to proceed to the next step, and select the operation “Get Mappings from DI Suite Mapping Manager”.

Provide the “Project Id” of the project in Mapping Manager.

Enter a name and folder for the adapter. A description can also optionally be entered for the adapter.



The image shows a dialog box titled "Web Service Configuration" with a gear icon in the top-left corner. The dialog is divided into several sections. The first section, labeled "Operation", contains a dropdown menu with the text "Get Mappings from DI Suite Mapping Manager" and a downward arrow. Below this is a "Project ID:" label followed by a text box containing the number "9". The next section is "Adapter Name:" with a text box containing "get Mappings". Below that is "Description:" with a larger text box containing "description". The final section is "Adapter Folder:" with a text box containing "C:\erwin\test-collector\adapter" and a "Browse" button to its right. At the bottom of the dialog, there are three buttons: "< Previous", "Next >", and "Exit".

---

Click the **Next >** button to proceed to the next step, where the adapter can be previewed and/or saved.



The image shows a 'Web Service Configuration' dialog box. It features a table with three columns: 'Type', 'Attribute Name', and 'Attribute Value'. Below the table, there is a 'Name:' label and a 'Value(s):' text area. To the right of the text area is an 'Enter' button. At the bottom of the dialog, there are four buttons: '< Previous', 'Test', 'Save', and 'Exit'.

To preview a sample of the first 50 results, click the **Test** button

To save the adapter to the DT database, click the **SAVE** button.

---

## 1.3 File Adapter Configuration

Going through this configuration window, the user can set up a file adapter to use as a data source or operation in a workflow.

It's possible to:

- Configure a File Adapter to use the file content as a data source in a workflow – **GET** type
- Configure a File Adapter to use as a workflow operation target – **PUT** type

See later for a detailed description of using a [File Adapter](#) the workflow configuration.

The screenshot shows the 'File Adapter' configuration window. At the top, there is a table with columns 'Name', 'Description', and 'Id'. Below the table, the configuration is divided into four main sections:

- General:** Includes fields for \* Name, \* Description, \* Adapter Folder (with a browse button), and \* Operation (a dropdown menu currently set to 'Get').
- Connection:** Includes fields for \* Host IP, \* Port (pre-filled with '21'), \* UserName, and \* Password.
- \* Operation Parameters:** Includes a dropdown for \* Protocol (set to 'FTP'), a dropdown for \* Type (set to 'CSV'), \* FTP Server Directory (with a browse button), and \* File/Filters (with a browse button).
- Proxy:** Includes a checkbox for 'Use Proxy Socks', and fields for Host IP, Port, UserName, and Password.

At the bottom of the window, there are several buttons: 'Add', 'Delete', 'Save', 'Cancel', 'Test', and 'Exit'.

---

The first group of fields in the window relate to the File Adapter List, which lists all the File Adapters available.

The second group is the General Parameters, which include the Name, Description, File Adapter folder and Operation type (GET - PUT); all these fields are mandatory.

Please note that in this case the adapter folder is the one used as the destination folder for the GET adapter and the source folder for the PUT adapters, as explained later.

The third group is the Operation Parameters, including all the parameters needed to actually perform the requested operation, as a Protocol (NFS or FTP), file type, etc.

The fourth group is the Connection Parameters to be set up when configuring an FTP file adapter.

To create a new File Adapter just press the  button and start editing the new adapter parameters.

The name, description and adapter folder for the File Adapter are the first fields to enter in the form; then, depending on the selection in the drop-down list named **Operation** (GET or PUT) the Operation Parameters section shows the following:

### 1.3.1 Operation “GET”

When the field “Operation” is set to “GET”, then the Operation Parameter section shows options for the file adapter execution. The first option is related to the protocol (NFS or FTP)

#### 1.3.1.1 *NFS Protocol*

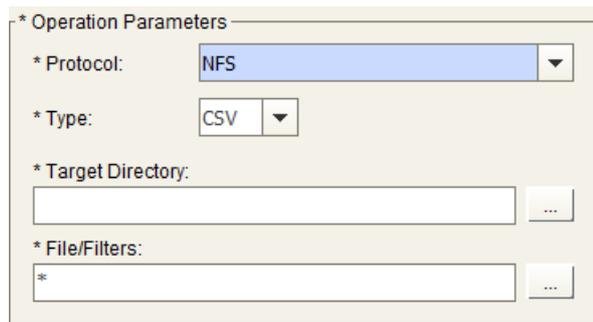
If the protocol is set to NFS, then the Operation Parameter section shows the following parameters:

- Type (CSV, Sheet, XML, MS Project, DM) – file type the adapter will manage
- Target (remote) Directory that will be used at adapter execution time to get files from; this may be anywhere in the Windows network file system, provided that it is accessible

---

and readable by the Windows user (“local system account”) performing batch operations.

- Filters – used to include more than one file in the adapter operation (using “\*” as a wildcard for the beginning, in the middle, or at the end of file name). If filter is set as a single “\*”, then the entire folder content will be used by the adapter during execution.



\* Operation Parameters

\* Protocol: NFS

\* Type: CSV

\* Target Directory: [ ] ...

\* File/Filters: \* [ ] ...

#### 1.3.1.2 FTP Protocol

If the protocol is set as FTP then the Operation Parameter section shows the following parameters:

- Type (CSV, Sheet, XML, MS Project, DM) – type of file the adapter will manage
- FTP Server Directory that will be used at adapter execution time; this may be anywhere in the network file system, provided that it is accessible and readable by the adapter specified in the FTP account (see below)
- Filters – used to include more than one file in the adapter operation (using “\*” as a wildcard for the beginning, in the middle, or at the end of file name). If filter is set as a single “\*”, then the entire folder content will be used by the adapter during execution.

---

\* Operation Parameters

\* Protocol: FTP

\* Type: CSV

\* FTP Server Directory: [ ] [ ... ]

\* File/Filters: [ \* ] [ ... ]

Moreover, the user has to define the Connection and Proxy sections with the parameters needed to access the FTP server.

Connection

\* Host IP: [ ] \* Port: 21

\* UserName: [ ]

\* Password: [ ]

Proxy

Use Proxy Socks

Host IP: [ ] Port: [ ]

UserName: [ ]

Password: [ ]

All the parameters in the Connection section are mandatory, including the FTP account to be used to access the specified directory; if a proxy is used then the user must complete the Proxy section parameters.

### 1.3.2 Operation “PUT”

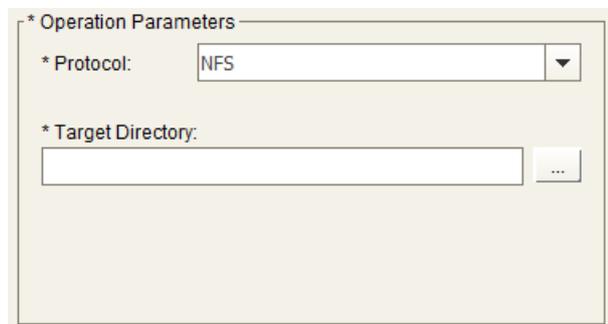
When the field “Operation” is set to “PUT”, then the Operation Parameter section shows options for the file adapter execution. The first option is related to the protocol (NFS or FTP)

---

### 1.3.2.1 NFS Protocol

If the protocol is set to NFS, then the Operation Parameter section shows the following parameters:

- Target (remote) Directory that will be used at adapter execution time, to drop files coming out from workflows using it as operation target; this may be anywhere in the Windows network file system, provided that it is accessible and writable by the Windows user (“local system account”) performing batch operations.

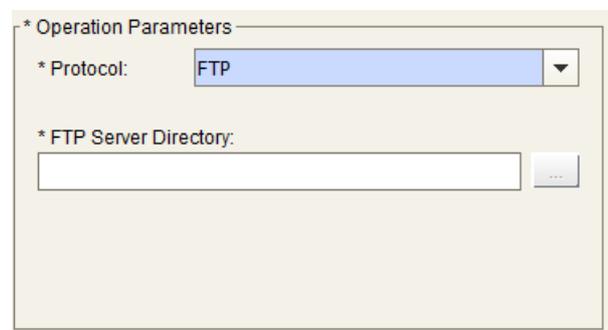


The screenshot shows a dialog box titled "\* Operation Parameters". It contains two main sections. The first section is labeled "\* Protocol:" and has a dropdown menu with "NFS" selected. The second section is labeled "\* Target Directory:" and has a text input field followed by a button with three dots "...".

### 1.3.2.2 FTP Protocol

If the protocol is set to FTP, then the Operation Parameter section shows the following parameters:

- FTP Server Directory that will be used at adapter execution time, to drop files coming out from workflows using it as operation target, provided that it is accessible and writable by the adapter specified FTP account (see below)



The screenshot shows a dialog box titled "\* Operation Parameters". It contains two main sections. The first section is labeled "\* Protocol:" and has a dropdown menu with "FTP" selected. The second section is labeled "\* FTP Server Directory:" and has a text input field followed by a button with three dots "...".

Moreover, the user has to define the Connection and Proxy sections with the parameters needed to access the FTP server.

---

The image shows a configuration dialog box with two main sections: 'Connection' and 'Proxy'. The 'Connection' section contains four mandatory fields: '\* Host IP:' (empty text box), '\* Port:' (text box containing '21'), '\* UserName:' (empty text box), and '\* Password:' (empty text box). The 'Proxy' section starts with a checkbox labeled 'Use Proxy Socks' which is currently unchecked. Below this are three more fields: 'Host IP:' (empty text box), 'Port:' (empty text box), 'UserName:' (empty text box), and 'Password:' (empty text box).

All the parameters in the Connection section are mandatory, including the FTP account to be used to access the specified directory; only if you have a proxy you must complete the Proxy section parameters.

To save the new File Adapter just created, press the  button. The adapter will be saved and added to the File Adapter List at the top of the window.

To cancel the adapter data just entered and to reset the window, press the  button.

To delete an existing adapter, just select it and press the  button. It will be permanently removed from the File Adapter List (all the items linked to the file adapter are removed: job, workflow using it as source).

The  button closes the window.

---

## 2 Transformation Library Configuration

In the Transformation Library there are some pre-built parsers (based onto XSLT) to apply transformations to the data managed through the workflow (see after):

- Data cleanse (like Data Type Check, Not Allowed Text Check)
- Data format (like Format Date - Format Number - Capital/Small letter - Suffix/Prefix - Replace Text)
- Data structure change (like Combine Field - Split Field - Add Fixed value field)
- Data filter (like Fixed values, Interval Value)
- Data Derivation (like Sum values in rows/columns, counting values in rows/columns, Match keys and pick values)

These kinds of XSLT files can't be modified or deleted by the user.

The screenshot shows the 'Library Configuration' dialog box. It contains a 'Library List' table and a 'Library Parameters' form.

Operation	Activity	Description	File
Custom Transforma...	CC2CSV	Transform workflow...	CC2CSV.xsl
Custom Transforma...	SharePointListPar...	Extract List items in...	GetListItemsResp...
Custom Transforma...	CC2EXCEL	Transform workflow...	CC2EXCEL.xslt
Custom Transforma...	CC2HTML	Transform workflow...	MyXSLT2HTML.xslt
Custom Transforma...	CC2PDF	Transform workflow...	wkhtmltopdf.exe
Data filtering	Distinct Values	Distinct Values	distinctValues.xsl

**Library Parameters** *\*Mandatory field*

Activity:\*  Type:\*

Description:

File:\*

---

The top field of the window shows the contents of the XSLT library, with a short description and the relative XSL file.

Selecting an activity from the list automatically completes the Library Parameters fields with the parameters of the library.

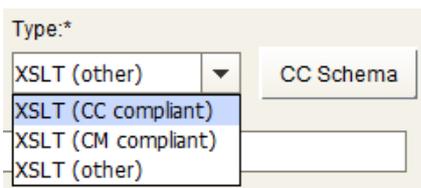
Optionally, it's also possible here to define custom XSLT library elements to be used in the workflow configuration for input or output data formatting (see later). The custom parsers must have been developed in advance, with a proper XML/XSLT editor.

To add a new custom XSLT to the library, press the  button; once the name and description are provided, the browse button pops up a new window allowing the user to select an .XSLT file from the file system. The selected file will be copied into the subfolder "library\Custom Transformation" of your DT data installation folder.

A custom transformation could be alternatively defined as:

- CC compliant – output is XML, compliant with the CC internal XML schema
- CC uncompliant – output is XML, with a different schema, or HTML, or TXT, or MS Excel
- CM compliant – output is XML, compliant with CM operation schema (only to be used to load in CM models multiple intersection object type at once)

It's possible to have a preview of the CC internal Schema / CM operation Schema pressing the  button, with the appropriate dropdown type selection:



```
<?xml version="1.0" encoding="UTF-8" ?>
<!-- W3C Schema generated by XMLSpy v2011 sp1 (http://www.altova.com) -->
- <xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema">
- <xs:simpleType name="ST_cell">
  <xs:restriction base="xs:string" />
</xs:simpleType>
- <xs:element name="root">
  <xs:complexType>
  - <xs:sequence>
    <xs:element ref="dataset" maxOccurs="unbounded" />
  </xs:sequence>
  <xs:attribute name="status" type="xs:string" use="optional" />
  <xs:attribute name="notifyTo" type="xs:string" use="optional" />
  <xs:attribute name="creationDate" type="xs:string" use="optional" />
  <xs:attribute name="wfName" type="xs:string" use="optional" />
  </xs:complexType>
</xs:element>
- <xs:element name="cell">
  <xs:complexType>
  - <xs:simpleContent>
    - <xs:extension base="ST_cell">
      <xs:attribute name="status" type="xs:string" use="optional" />
      <xs:attribute name="name" type="xs:string" use="required" />
    </xs:extension>
  </xs:simpleContent>
  </xs:complexType>
```

The  button saves the XSL library once created or modified by the user.

The  button deletes the XSL library that user selected from the list.

The  button resets all the fields just edited by the user.

The  button closes the window.

---

# Chapter 3

## 1 Model Configuration

If logged to a CE Repository, this window can add, delete or modify a *model configuration*. A *model configuration* is a group of parameters that:

- Allows DT to connect to models in CE repository
- Allows the user to configure preferences (publication sets, export folder, etc.)

In order to prevent inconsistency that may arise if two or more configurations address the same data, one model can be associated to only one configuration.

Name	State	Id
Somma TCO	Active	3

The first step is to select a configuration from the pick list, or add a new one by clicking the  button.

---

Selecting an existing configuration fills all fields in the form automatically.

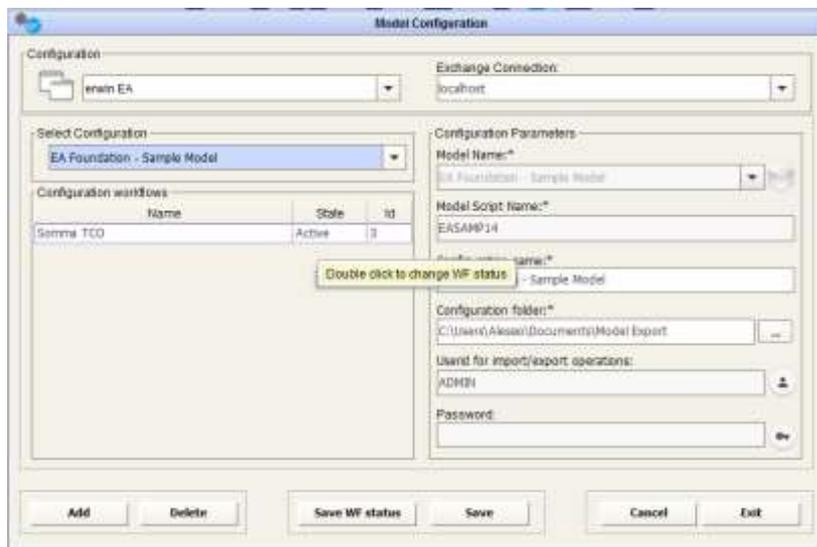
On pressing the “Add” button, the user is required to set the configuration name, to select a model name and an export folder, which will be also *the working folder for automatically created adapters to import/export data from workspace*.

In particular, the user should select model name and preferences in the section “Model parameters”. All fields are mandatory.

In detail, the following parameters have to be defined:

- **Model name** – select the name of the model you want to work with.
- **Configuration Folder** – browse to a path where you wish the model backups and exports to be saved

At the left side of model configuration window, is a list of the existing workflows created to manage information flows in and out of that model. In particular, you can see the name, the activation status and ID of each (useful for troubleshooting purposes, see later).



You can change “Active/Not Active” status of the single workflow by double-clicking on status cell, and then simultaneously saving the current set with the **Save WF status** button.

---

To save the Model Configuration use the  button .

Pressing the  button clears all fields on this form.

To delete an existing configuration just select it from the configurations list and press the  button. The configuration will be removed from the list. Please note that if a configuration is deleted, all the adapters, jobs and workflows associated to the configuration will be deleted.

The  button closes the window.

---

## 2 Workspace Configuration

If logged in to EA Agile or EA Agile V3, this window is to add, delete or modify a *workspace configuration*. A *workspace configuration*, in a similar way to CM *model configuration*, from the tool perspective, is a group of parameters that:

- Allows DT to connect to an EA Agile workspace
- Allows the user to configure preferences for export folder

In order to prevent inconsistency that can arise if two or more configurations address the same data, one workspace can be associated to only one configuration.

The screenshot shows the 'Model Configuration' dialog box. It is divided into several sections:

- Configuration:** A dropdown menu showing 'erwin EA Agile' and a 'Base URL' field containing 'https://uk.myerwin.io'.
- Select Configuration:** A dropdown menu showing 'My AS IS Architecture'.
- Configuration workflows:** A table with columns 'Name', 'State', and 'Id'.

Name	State	Id
_A SALSAL MULTI 3	Not Active	1303
BMC ADDM getting Hosts	Active	1288
EA AGILE - Load Apps from App catalogue	Active	1275
EA AGILE - Export app component to DB Lo...	Not Active	1272
EA AGILE - Export app component to PDF	Active	1279
EA AGILE - Export app components to Serv...	Active	1274
EA AGILE - Exporting View My Reqs	Not Active	1276
EA Agile - Getting Applications from Service...	Active	1284
Exporting requirements (OT)	Not Active	1287
My CRM Portfolio	Active	1283
- Configuration Parameters:** Fields for 'Workspace Name:' (My AS IS Architecture), 'Workspace ID:' (1705), 'Configuration name:' (My AS IS Architecture), 'Configuration folder:' (C:\Users\csalaris\Documents\\_CC\_EAGILE), 'Userid for import/export operations:' (csalaris), and 'Password:' (masked).

At the bottom of the dialog are buttons for 'Add', 'Delete', 'Save WF status', 'Save', 'Cancel', and 'Exit'.

The first step is to select a configuration from the pick list, or add a new one by clicking the  button.

Selecting an existing configuration fills in all fields on the form automatically.

---

On pressing the “Add” button, the user is required to set the configuration name, to select a workspace name and the export folder, which will be also *the working folder for automatically created adapters to import/export data from workspace*.

In particular, the user should select model name and preferences in the section “Model parameters”. All fields are mandatory.

In detail, the following parameters have to be defined:

- **Workspace name** – select the name of the workspace you want to work with.
- **Configuration Folder** – browse to a path where you wish the exports to be saved

At the left side of model configuration window, is a list of the existing workflows created to manage information flows in and out of that model. In particular, you can see the name, the activation status and ID of each (useful for troubleshooting purposes, see later).

Name	State	Id
_A SALSAL MULTI 3	Not Active	1303
BMC ADDM getting Hosts	Active	1288
EA AGILE - Load Apps from App catalogue	Active	1275
EA AGILE - Export app component to DB Lo...	Not Active	1272
EA AGILE - Export app component to PDF	Active	1279
EA AGILE - Export app components to Serv...	Active	1274
EA AGILE - Exporting View My Reqs	Not Active	1276
EA Agile - Getting Applications from Service...	Active	1284
Exporting requirements (OT)	Not Active	1287
My CRM Portfolio	Active	1283

---

You can change “Active/Not Active” status of the single workflow by double-clicking on status cell, and then simultaneously saving the current set with the  button.

To save all the Model Configuration use the  button.

Pressing the  button clears all fields on this form.

To delete an existing configuration just select it from the configurations list and press the  button. The configuration will be removed from the list. Please note that if a configuration is deleted, all the adapters, jobs and workflows associated to the configuration will be deleted.

The  button closes the window.

---

# Chapter 4

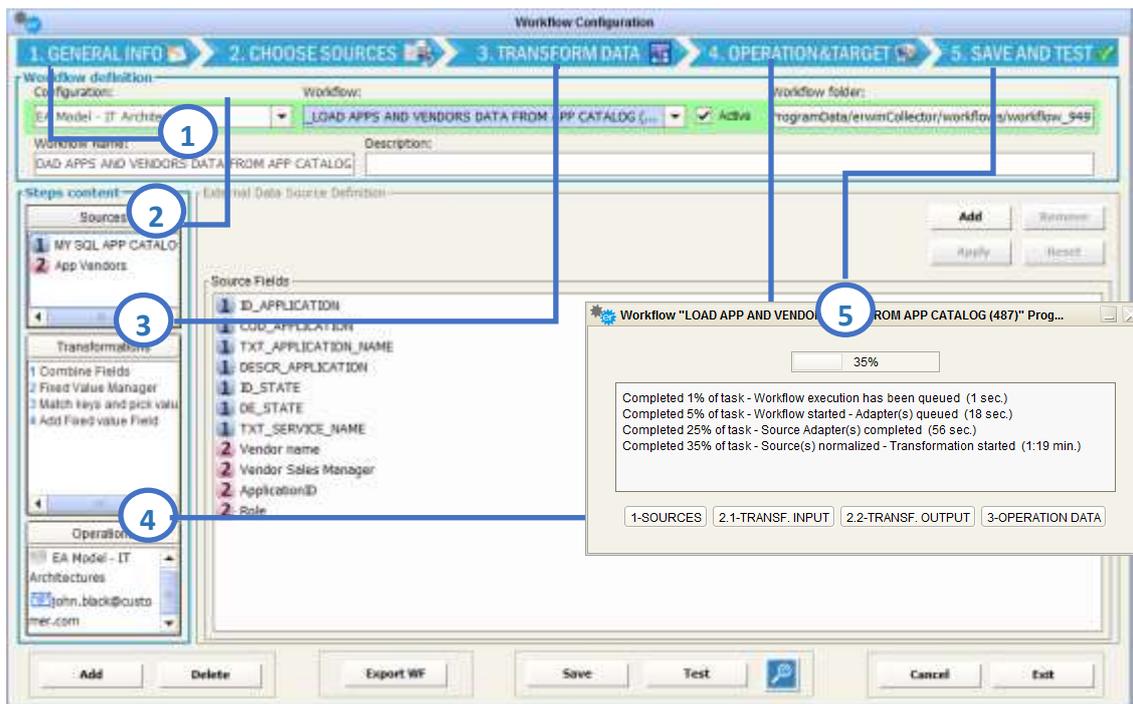
## 1 WorkFlow Configuration

This window goes through the configuration and management of the Workflow. For each CW model, for which a configuration has been set up (see

Chapter 3), the user can define more than one workflow.

Each workflow is described through three main sections:

- Data Source, containing information for getting the input data
- Transformation, containing activities to be applied to transform the input data
- Operation, which details the target of the workflow, i.e. where to send the output data



Configuring a workflow means:

1. Providing **general information**, like name, descriptions and “active” status
2. Choosing applicable **data sources**, and providing normalization parameters (like name of the sheet for Excel files, or the object type to extract for an EA/EA Agile Adapter)
3. Optional data **transformation** – filters on source data and other needed data manipulations settings
4. **Operation and target** – what system/human resource is the target for the desired operation

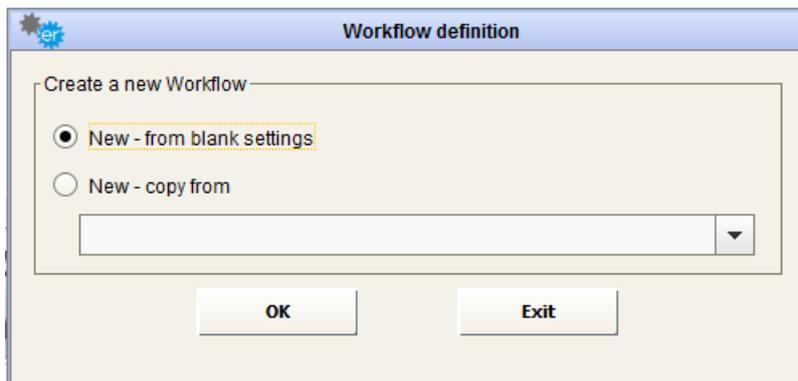
- 
5. **Test** and **save** the workflow: workflow is ready to be tested (whatever the setting for “Active” checkbox is) and saved for further scheduled executions (if set in “Active” mode)

First of all the user is required to select a model/workspace configuration in the **Configuration** drop-down list.

In the “Workflow” drop down list are displayed all the existing workflows for that model configuration.

To create a new Workflow, press the  button. This pops up a new window with two options:

- Create the new Workflow from blank settings (option “New – from blank settings”), or
- Copy it from an existing Workflow, that the user can choose from the displayed drop-down list (option “New – copy from”).



When the user presses the “Add” button the workflow name and description are set and then the three sections of a workflow are defined.

## 1.1 Data Source

To define the source of a Workflow follow the steps in the section “External Data Source Definition”:

- Select ADD button
- Select the external data source type

---

According to the type of the data source, the External Data Source Definition section shows the requested data normalization parameters as described below.

User may also create File Adapter, DB Adapter and Web Service Adapter using the <Create New> item in the available adapters list, and pressing “Apply” button.

### 1.1.1 File Adapter



Select the name of the File Adapter from the drop-down list, Name (as mentioned in Chapter “File Adapter Configuration” only “GET” File Adapters will appear in the list).

- If the type of file is “**CSV**” it’s necessary to complete the following information:
  - Header (yes/no)
  - Separator (between columns)
- If the type of file is “**Sheet**” it’s necessary to complete the following information:
  - Header (yes/no)
  - 1° column
  - 1° row
  - Sheet name
- If the type of file is “**XML**” it’s necessary to complete the following:
  - XSL ParserThis parser can be selected in a list containing all “non CC compliant” custom transformations, previously defined in “XSLT

Library”. Any XSLT parser developed to manage XML data has to provide a CSV structure, with a “semicolon” as a separator.

- If the type of file is “**Project**” it’s necessary to complete the following:
  - Project Information (TASK, RESOURCE)

This allows the user to extract information from the project file, related to the work breakdown structure, task start and end dates, task duration, task cost; or the resource assignments in task, with earned value information, budget and actual cost and work.
- If the type of file is “**DM**” it’s necessary to complete the following:
  - DM Information (ENTITY\_ATTRIBUTES, RELATIONSHIPS)

This allows the user to extract information from DM export file, about Entities, their attributes and Primary Key/Foreign Key roles and Relationships:

ENTITY_NAME	ATTRIBUTE_NAME	ATTRIBUTE_WTABLE_NAME	ATTRIBUTE_TYPE	ATTRIBUTE_IS_PK_OF	ATTRIBUTE_IS_NONKEY_OF	ATTRIBUTE_IS_FK_OF_ENTITY	ATTRIBUTE_IS_FK_OF_ENTITYPATH
Person	firstName	Person.firstName	char(15)			Person	
Person	surName	Person.surName	char(20)			Person	
Person	sex	Person.sex	char(10)		Person		
Address	address_line_1	Address.address_line_1	char(100)			Address	
Address	address_line_2	Address.address_line_2	char(100)			Address	
Address	city	Address.city	char(10)			Address	
Address	zip_code	Address.zip_code	char(10)			Address	
Address	address_identifier	Address.address_identifier	char(10)			Address	
Address	sex	Address.sex	char(10)			Address	Person sex
Task	taskID	Task.taskID	char(10)	Task			
Task	Name	Task.Name	char(10)			Task	
Task	Description	Task.Description	char(10)			Task	
Task	duration	Task.duration	int			Task	
Task	startDate	Task.startDate	datetime			Task	
Task	endDate	Task.endDate	datetime			Task	
Task	cost	Task.cost	char(10)			Task	Person cost
Message_Log	time	Message_Log.time	time		Message_Log		
Message_Log	log_text	Message_Log.log_text	char(80)		Message_Log		
Message_Log	cost	Message_Log.cost	char(10)		Message_Log	Person	Person cost

REL_NAME	TABLE2TABLE_NAME	PARENT_ENTITY	CHILD_ENTITY	CARDINALITY
may have	Person may have Address	Person	Address	-3
creates	Person creates Task	Person	Task	-3
logs in	Person logs in Message_Log	Person	Message_Log	-3

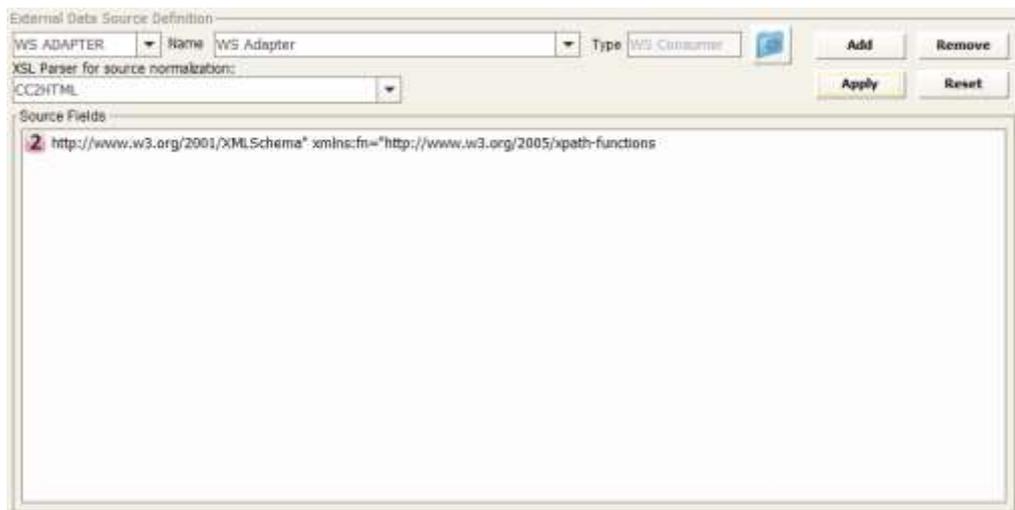
- Click the “Apply” button to save the data source
- A preview of the source fields will be shown

## 1.1.2 DB Adapter



- Select the name of the DB Adapter from the drop-down list, Name (only DB Query and Stored Procedure Adapters will appear in the list)
- Click the “Apply” button to save the data source
- A preview of the source fields will be shown

## 1.1.3 WS Adapter



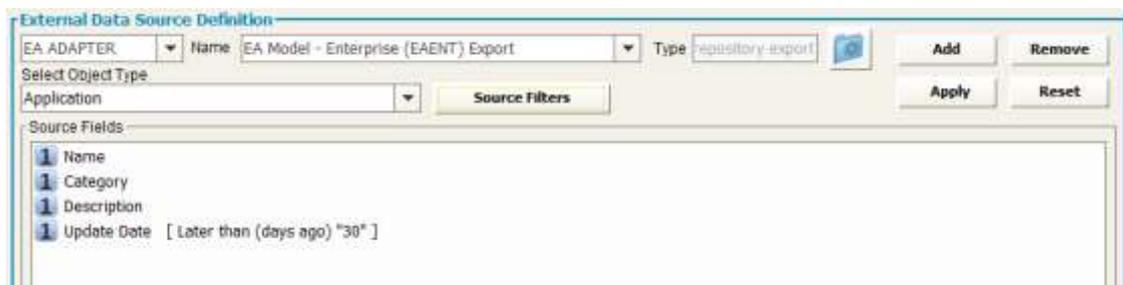
- Select the name of the Web Services Adapter from the drop-down list
- Select XSL Parser for source normalization from the list

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This parser can be chosen in a list containing all “non CC compliant” custom transformations previously defined in “XSLT Library”; in particular, any XSLT parser developed to manage outside XML data has to provide a CSV structure, with “semicolon” as separator, to be effective in this step.

- Click on the “Apply” button to save the data source
- A preview of the source fields will be shown

### 1.1.4 EA Adapter (formerly CM Adapter)



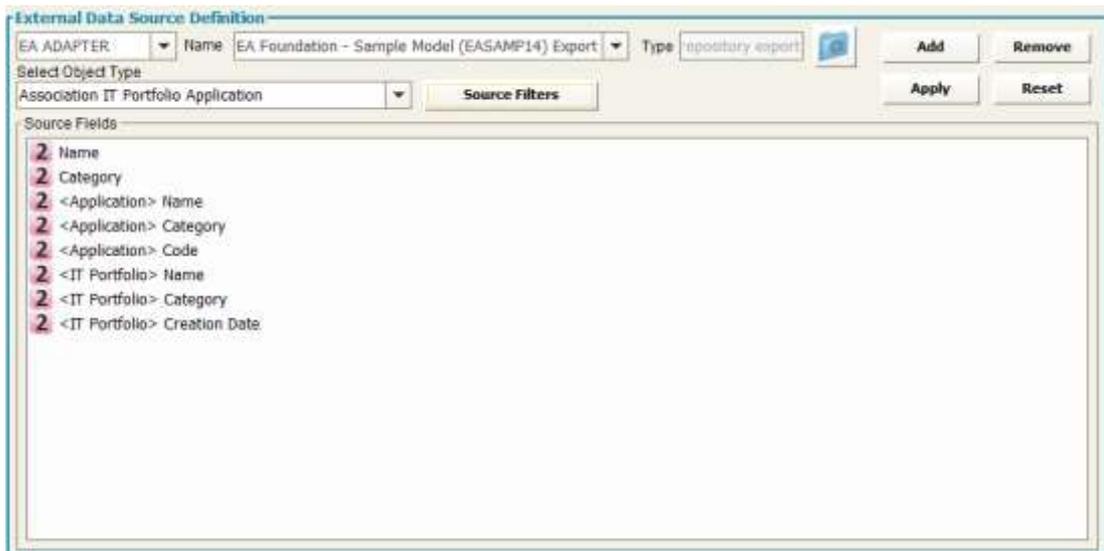
When creating a model configuration, adapters to import / export data from model are automatically created (the working folder is the one set as “Export folder”):

Select the name of the EA Adapter from the drop-down list Name (only the “EA Adapters for import” will be shown in the list)

- Select the object type from the drop-down list “Select Object Type”
- Click on the “Apply” button to save the data source
- A preview of the source fields will be shown

It’s also possible to choose which Properties/Associations extract through an EA Adapter for the selected object type. The “Source Filters” button allow user to pick only the desired information from a model, while default operation includes all of them.

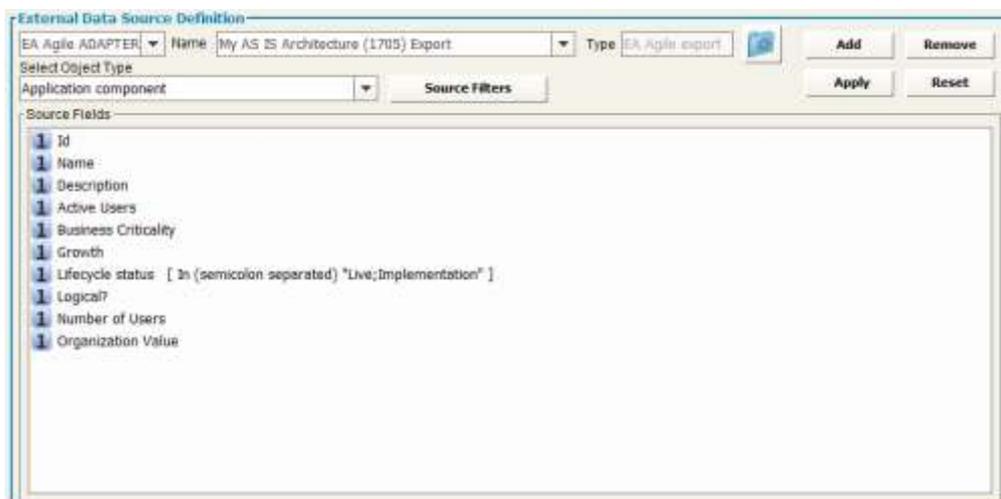




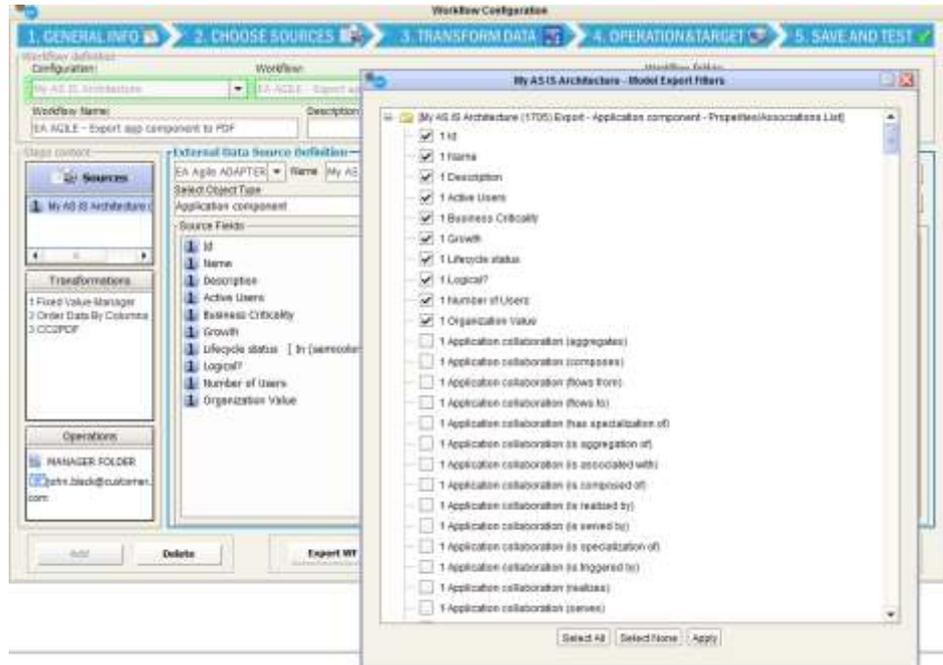
### 1.1.5 EA Agile Adapter

When creating a workspace configuration, adapters to import / export data from workspace are automatically created (the working folder is the one set as “Export folder”):

- Select the name of the EA Agile Adapter from the drop-down list Name (only the “EA Agile Adapters for export” will be shown in the list)
- Select the object type from the drop-down list “Select Object Type”
- Click the “Apply” button to save the data source
- A preview of the source fields will be shown



It's also possible to choose which Properties/Associations extract through an EA Agile Adapter for the selected object type. The "Source Filters" button allow user to pick only the desired information, while default operation includes all of them.

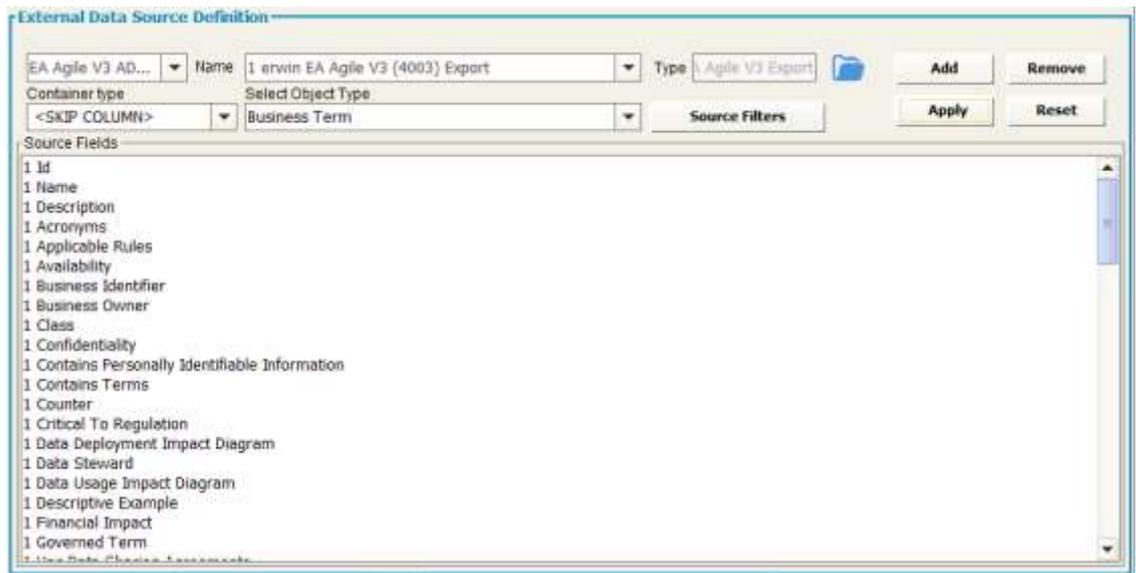


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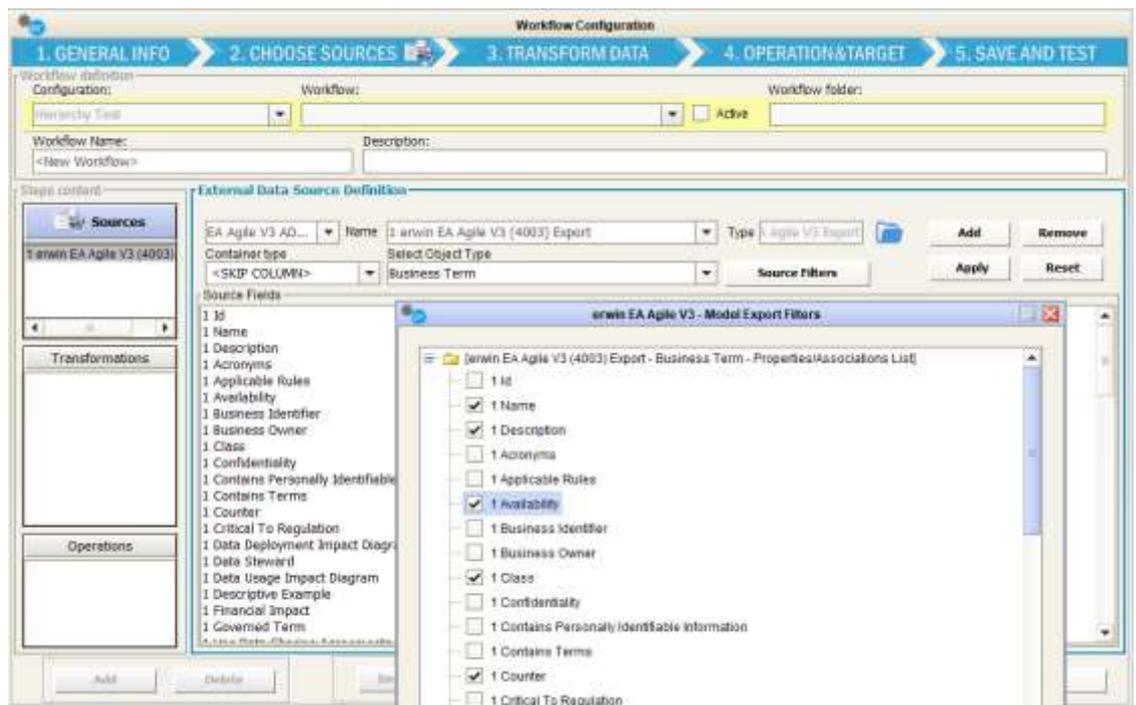
### 1.1.6 EA Agile V3 Adapter

When creating a workspace configuration for EA Agile V3, adapters to import / export data from the platform are automatically created (the working folder is the one set as “Export folder”):

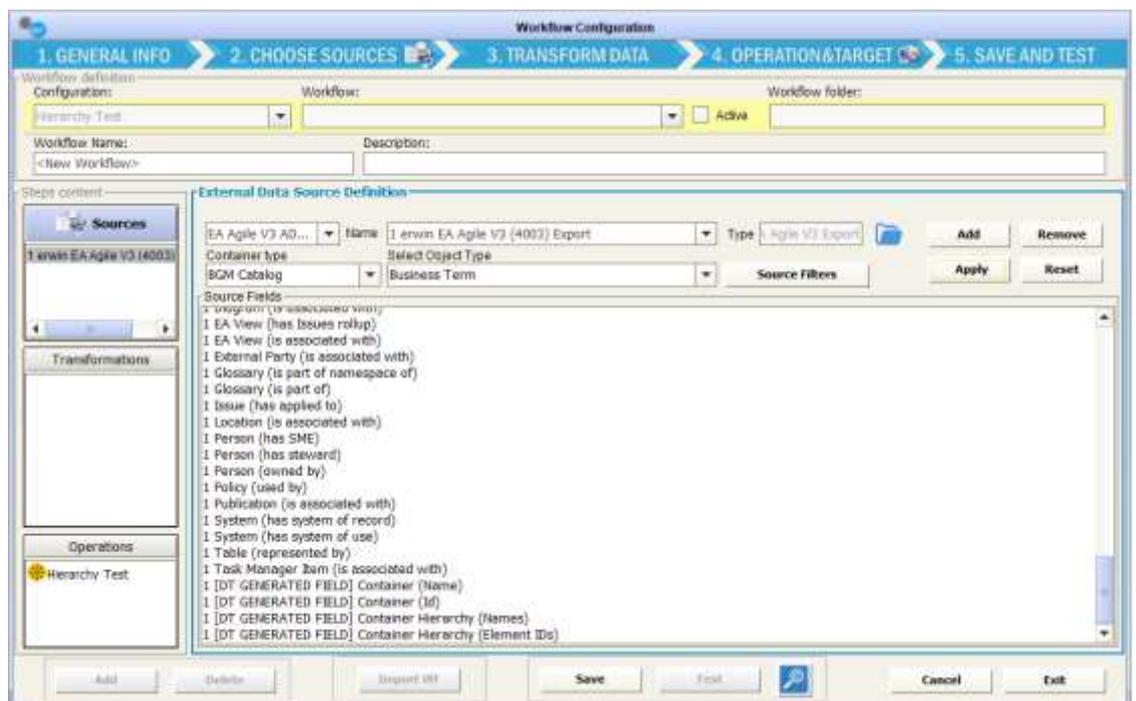
- Select the name of the EA Agile V3 Adapter from the drop-down list Name (only the “EA Agile V3 Adapters for export” will be shown in the list)
- Select the object type from the drop-down list “Select Object Type”
- Click the “Apply” button to save the data source
- A preview of the source fields will be shown



It's also possible to choose which Properties/Associations extract through a EA Agile V3 Adapter for the selected object type. The “Source Filters” button allow user to pick only the desired information, while default operation includes all of them.



It is also possible to optionally select a “Container type” for the selected; for an object type that contains either an object of the same type or the selected object type as a terminal node, the hierarchy of the source object type will be resolved in generated fields. This cannot be combined reliably with the source filters.



Regardless of the data source type, it is possible to insert more than one data source in the same workflow of the same type or of different types); each data source is then marked with a sequence number.

In this case you have a “multi source” workflow, and a specific “**multisource job**” is created to be scheduled and produce all the different data sets involved at the same time (thus ensuring the time consistency of the whole set of related information). The data sources defined in a workflow will be displayed in the section Source Definition in the left upper area of the Workflow window:



It's possible to select one of these data sources to modify it. Please be careful, as when a user modifies the source of a workflow, all fields will be deleted for the transformation and mapping rules, where they are not required by the new source definition.

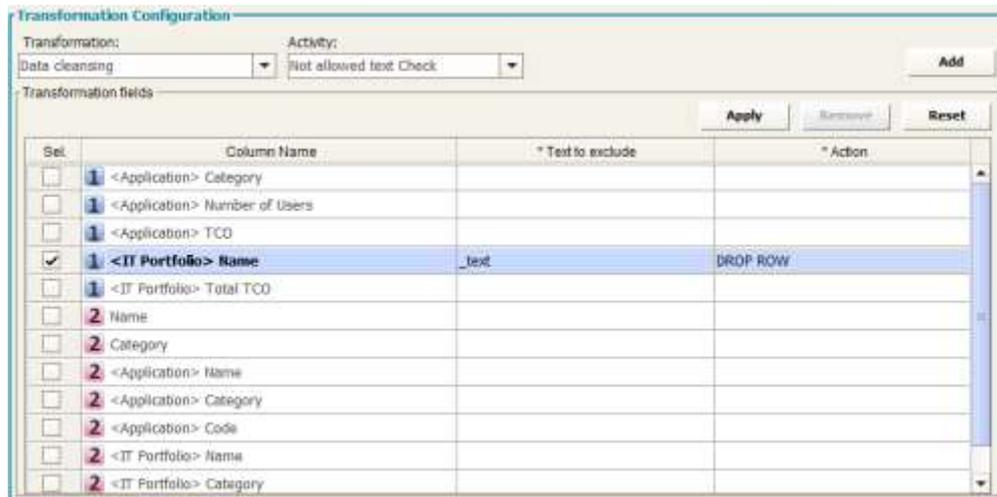
The  button deletes the selected source from the workflow; the  button clears all the settings for the selected source.

*Please note that changing the source will result in a transformation and mappings reset, unless the new source provides exactly the same source columns as the previous.*

## 1.2 Transformation

To define the transformations in the intermediate step of the new Workflow follow the following steps in the section Transformation Configuration:

- Click on the ADD button to insert a transformation. It's possible to add more than one transformation for each workflow and apply a specific transformation to the data source fields or to the new columns coming from a previous transformation of the same workflow. - Select the transformation from the “Transformation” and “Activity” drop-down lists
- Click the “Apply” button to apply the selected transformation rule



The available Transformations and Activities are:

### 1.2.1 Data Cleansing

#### 1.2.1.1 Data Type Check

The “*Data Type Check*” Transformation applies in the case the user needs to check the *format* of the columns and perform an *action* in case the data format is not compliant with the specified format. The actions are *drop text* (exclude from the following workflow steps only the invalid format values in the specified column), *drop row* (exclude from the following workflow steps the whole record containing an invalid value for any specified column) or *drop file* (discard the entire file – no following operations will be performed). All these configurations may be done separately for each source field.

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### 1.2.1.2 *Not Allowed Text Check*

The “*Not Allowed Text Check*” Transformation applies when it’s required to check if in the selected column there is a specific *string value* and perform an *action* in the case of invalid data.

If a cell contains a value containing that text (i.e. is not valid) the user can choose the action to perform. The possible choices of action are *drop text* (remove specified text from the cells in the specified column), *drop row* (exclude from the following workflow steps the whole record containing an invalid value for any specified column) or *drop file* (discard the entire file – no following operations will be performed). All these configurations may be done separately for each source field.

### 1.2.1.3 *Normalize Blank Spaces*

The “*Normalize Blank Spaces*” Transformation applies when it’s required to delete some redundant blank spaces in the cell value. It’s possible to choose between “Left Trim”, “Right Trim”, “Trim (both sides)”, “Normalize Blank Spaces” (this will trim blank spaces from both sides and delete internal spaces between words if more than one. All these configurations may be done separately for each source field.

## 1.2.2 Data Formatting

### 1.2.2.1 *Format Date*

The “*Format Date*” Transformation applies if it is required to *transform* a column with internal data type DATE from a specific *source format* (for example EUR date format) into a different *target format* (for example USA date format). If the column value can’t be transformed into the specific format, the user can choose the action to perform. The possible actions are; *drop text* (exclude from the following workflow steps only the values in the specified column where transformation can’t be performed), *drop row* (exclude from the following workflow steps the whole record for a specified column where the transformation can’t be performed in any specified column) or *drop file* (discard the entire file – no following operations will be performed). All these configurations may be done separately for each source field.

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#### 1.2.2.2 *Format Number*

The “*Format Number*” Transformation applies if it is required to transform a column with internal data type NUMBER (integer or decimal) from a specific source format (for example EUR number format) into a different target format (for example USA number format). If the column value can't be transformed into the specified format, the user can choose the action to perform. The possible actions are *drop text* (exclude only the values in the specified column where the transformation can't be performed), *drop row* (exclude the whole record for a specified column where the transformation can't be performed in any specified column) or *drop file* (discard the entire file and stop). All these configurations may be done separately for each source field.

#### 1.2.2.3 *Capital/Small letter*

The “*Capital/Small Letter*” Transformation applies if it is required to change the string format of a specific column; the user can choose from Capitalized, To Upper and To Lower. The transformation will be applied to the specified column value. All these configurations may be done separately for each source field.

#### 1.2.2.4 *Suffix/Prefix*

The “*Suffix/Prefix*” Transformation applies if it is required to add a specific string to a specific column value; the user can choose between Suffix and Prefix and insert the string to add as prefix/suffix to the column value. All these configurations may be done separately for each source field.

#### 1.2.2.5 *Replace Text*

The “*Replace Text*” Transformation applies if it is required to replace a specific string value with another string value into a specific column values; the user can edit the text to be replaced and the text to replace it with. Some special replace can be obtained: in a cell containing multi-values separated by commas, for instance, using “\n” to replace “,” will result in a cell containing a list of those values separated by a newline. Also, wildcards can be used: for instance, when asked to replace “**PROC\*\_**” with “”, DT will delete this sub word from the cell value regardless of the

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dynamic part of it. All these configurations may be done separately for each source field.

Special parameter can be used for particular replace requirements:

- **<%BLANK%>** as text to be replaced: to replace empty text
- **<%SYSDATE%>** as text to replace with: to obtain datetime (at execution time) in *UTC format* or **<%SYSDATE\_EUR%>** to obtain datetime in *European format* or **<%SYSDATE\_USA%>** to obtain datetime in *United States format* (see [here](#) for date format descriptions).

#### 1.2.2.6 *Replace Value on Condition*

The “*Replace Value on Condition*” Transformation applies if it is required to set a specific value if a condition is matched and another if it’s not. The user can edit the condition on the source column, choosing between “Equal”, “Not Equal”, “Less than (numeric value)”, “Greater than (numeric value)”, “Like” or “Not Like” options, and then editing the value to be compared with the source column value. Then the user may pick between the available columns to set the column target to be used in case the condition is matched or not. Parameters can be applied as previous transformation.

#### 1.2.2.7 *Rename and Order Columns*

The “*Rename and Order Columns*” Transformation applies if it is required to change the name of a specific column, and or its order, in the output; the user can choose to rename a column, to give it a different order from the natural one (as coming from the source), or both. The order is not mandatory, while the given orders must not be conflicting. The transformation will be applied to the specified column value. All these configurations may be done separately for each source field.

#### 1.2.2.8 *Selected Value in List*

The “*Selected Value in List*” Transformation applies if there is a column containing a multiline text, as when exporting from a CM model an object and a list of associated objects, and it’s needed to have a single item of that list, either the first or the last. The user can set the option on the source column, choosing between

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“First value in List”, “Last value in List”. All these configurations may be done separately for each source field.

#### 1.2.2.9 Multiple Rows Values to Multiline Cell

The “*Multiple Rows Values to Multiline Cell*” Transformation applies to get a list of items from a column containing different values, fixed other columns, grouping them in a multiline cell.

*Typical use case:* when exporting an intersection object type, with couples of associated objects, from a model, for a given couple obj1-obj2, obtain one single row with obj1 and a list of all the obj2 for that obj1 value.



#### 1.2.2.10 Multiline Cell to Multiple Rows

The “*Multiline Cell to Multiple Rows*” Transformation applies to get, from a single multi-value (multiline) cell, one different row for one single different value in multiline value

*Typical use case:* getting an object from CM, with properties and associations and obtain one row per associated object, for selected association type



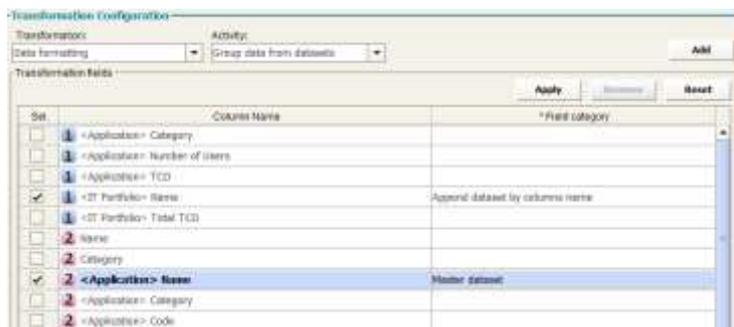
#### 1.2.2.11 Group data from datasets

The “*Group data from datasets*” Transformation applies when data belonging to different dataset must be grouped into one.

*Typical use case:* different lists of the same object type are provided by different data sources, and must be loaded into

model, in a single workflow operation. This can be obtained defining:

- one dataset to be the **master** (this will contain all merged data): set this option on whatever column in the dataset
- one or more dataset providing data to **append by column name** (data will be appended to the master one by its columns name): set this option on whatever column in the dataset
- one or more dataset providing data to **append by column position** (data will be appended to the master one by its columns position): set this option on whatever column in the dataset



After the transformation, the master dataset will contain all data as per configured merging options, and can be used to send data to model:

Column Name	Type	Objtypes	Mapping Properties/Col.	Type	Action	KeySet	Has use
<Application> Category	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<Application> Number of U...	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<Application> TCD	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Name	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Total TCD	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
Name	Generic string	Application	<DB NAME> Name	Single line L...		<input type="checkbox"/>	<input type="checkbox"/>
Category	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<Application> Name	Generic string	Application	<DB NAME> Name	Single line L...		<input type="checkbox"/>	<input type="checkbox"/>
<Application> Category	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<Application> Code	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Name	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Category	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Create Date	Generic string	<EXP COLUMN>	<EXP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>

### 1.2.2.12 Sort Data by Columns

The “Sort Data by Columns” Transformation applies if it is required to sort data by column contents. Use columns “Order Index” (1..4) and “Order Type” (“A to Z”, “Z to A”, “Numerical

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Ascending”, “Numerical Descending”) to have data sorted by the corresponding content and settings.

#### 1.2.2.13 *Compare and Replace*

The “*Compare and Replace*” Transformation applies if it is required to compare two column values, and replace a third or fourth column value, if the condition is matched or not. Check the source column to be compared, set the condition, and the value for the comparison; select the true value (column to be used to replace value of the source, when condition is matched) and false value (column to be used to replace value of the source, when condition is not matched). After the transformation, the source column value will be replaced with the “true” value or “false” value, depending from the result of the condition evaluation.

### 1.2.3 Data Structure Changing

#### 1.2.3.1 *Combine Field*

The “*Combine Field*” Transformation applies if it is required to create a new column as result of the combination of two other column values. The user can insert a name of the new column, the *first field* of the combine operation, a *separator* and the *second field*.

The user must indicate which is **the data source to assign to** the new column, using the “Adapter to assign column” drop-down list. This new column can be used by another transformation or by the mapping operation. Special chars like “\n” (combine with newline) can be used for specific requirements.

#### 1.2.3.2 *Split Field*

The “*Split Field*” Transformation applies if it is required to create two new columns as result of the splitting an existing column value.

The user can insert the name of the *two new columns* and the *separator* that the system must use to perform the split operation. If you have more than one data source, you must indicate which is the data source to assign the new column to, using the “Adapter to assign column” drop-down list. This new column can

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be used by another transformation or by the mapping operation. Special chars like “\n” (split by newline) can be used for specific requirements.

#### 1.2.3.3 *Add Fixed value field*

The “*Add Fixed Value Field*” Transformation applies if it is required to create a *new column* with the same *value* for all the entries. The user can insert a name for the *new column* and the *value* to assign to it. When you have more than one data source you must indicate which is the data source to assign the new column to, using the “Adapter to assign column” drop-down list. This *new column* can be used by another transformation or by the mapping operation. A parameter can be used to populate the new column with the system date and time: **<%SYSDATE%>** for *UTC format*, **<%SYSDATE\_EUR%>** for *EUR format*, **<%SYSDATE\_USA%>** for *USA format* (see paragraph 1.3.1 for date format descriptions).

#### 1.2.3.4 *Copy Column*

The “*Copy Column*” Transformation applies if it is required to create a *new column* with the *same values of another*. The user can insert the name of the new column and the column value to assign to it, picking it from a list of available columns. The user must indicate which is the data source to assign the new column to, using the “Adapter to assign column” drop-down list.

This new column can be used by another transformation or by the mapping operation.

#### 1.2.3.5 *Drop Column*

The “*Drop Column*” Transformation applies if it is required to delete one or more *columns* from the output. The user must check the column to be deleted and set the action to “DROP COLUMN”. The selected columns will not be included in the resulting output. A second option, “DROP DATASET”, will remove from the output the entire dataset that the column is in.

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## 1.2.4 Data Filtering

### 1.2.4.1 Fixed value manager

The “*Fixed Value Manager*” Transformation applies if it is required to *filter* the workflow data by some *fixed value* specified for a given column. The user can insert the format of the column, the *filter operator* between “*Equal*”, “*Not Equal*”, “*Greater than*”, “*Less than*”, “*Like*” or “*Not Like*”, “*Equal sysdate*”, “*Later than (days ago)*”, “*Later than (hours ago)*”, “*Later than (minutes ago)*”, “*Earlier than (days ago)*”, “*Earlier than (hours ago)*”, “*Earlier than (minutes ago)*”, “*In (semicolon separated)*”, “*Not in (semicolon separated)*” and the value to use as filter. For example, the condition “*Not Like*” and the value “*a*” will remove from the resulting dataset all the rows in which that column value does not contain “*a*” (case sensitive). All the configurations may be done separately for each source field.

When using “*Like*” and “*Not Like*”, wildcard “*%*” can be used to filter content containing text (“*%CRM%*”: only cells containing “*CRM*” match filter), starting with text (“*CRM%*”: only cells starting with “*CRM*” match filter), ending with text (“*%CRM*”: only cells ending with “*CRM*” match filter).

When possible, **filters defined as first transformation in the list, for columns coming from a CM Object Type export**, are executed at export time, allowing for more compact and less consuming workflow execution.

### 1.2.4.2 Interval value manager

The “*Interval Value Manager*” Transformation applies if it is required to *filter* the workflow data by a *list of possible values* specified for a given column. Users have to define the *value list*, and the *separator* between the list items. All these configurations may be done separately for each source field.

### 1.2.4.3 Distinct values

The “*Distinct Value*” Transformation applies if it is required to *obtain distinct occurrences of data* by a *list of columns* specified as the keyset. Users have to define the columns to be the keyset setting the *action* “*DISTINCT*”. The result will contain only one

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occurrence for any combination of values of the selected “DISTINCT” columns list.

#### 1.2.4.4 *Not All Null values*

The “*Not All Null values*” Transformation applies if it is required to *check that at least one value is not null in a list of columns* specified by user. Users have to define the columns to be verified setting the *action “Check value in Column”*. The result will contain only rows containing at least one non null value in the selected columns.

#### 1.2.4.5 *In/Not In Dataset*

The “*In/Not In Dataset*” Transformation applies if it is required to *filter one dataset by the condition that a key column value is (not) in the allowed values list, provided by a slave key column in a second dataset*. Users have to define for the master dataset a column as the “*Key (master)*” and a column as the “*Key (Slave) – IN*” or “*Key (Slave) – NOT IN*”. The result will contain rows in the master dataset, only if its master key column value (does not) exist in the slave dataset, in the slave key column.

### 1.2.5 Data Derivation

#### 1.2.5.1 *Match Keys and Pick Values*

The “*Match Keys and Pick Values*” Transformation (former “*Format Values On Conditions*”) applies if it is required to join values from different data sets, apply conditions to different column values, and then specify a result column value if the conditions (evaluated all together) are matched or not. For first, given two datasets, the user must choose a column for the first and a column for the second, setting one as “*Key (master)*” and the other as “*Key (slave)*” for the join operation. Then, for the remaining columns, the user may optionally define a “*condition*” as described for the “*Replace value on condition*” transformation: they have to all be matched to make the transformation condition be true. Lastly, the user can choose one or more columns as “*result*” column, thus choosing which column value to set for it if the condition is true and which if it’s false, picking them from the

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joined dataset columns. User may also define a single column as “*Key (master)/Result*”, to be used both as a key for the join, and to host the result when matching occurs. Please be sure that column that is identified as “*Key (slave)*” contains only one occurrence per key value, while this is not mandatory for the master.

#### 1.2.5.2 *Count Items In Column*

The “*Count Items In Column*” Transformation applies if it is required to evaluate the number of item in a list, with an item per line in a multiline *column*. The user must give a name for the new column that will contain the number of items (one per line of the multiline cell) and select from a dropdown list the column containing the multiline text. The output column will contain the number of items (lines) in the selected multiline column.

#### 1.2.5.3 *Count Items In Rows*

The “*Count Items In Rows*” Transformation applies if it is required to count the *occurrence of a given keyset for several rows*. The user must choose one or more columns to be the “*Key (for data aggregation)*”, a column to be the “*Source column (to count items for keyset)*” and a third column to be the “*Result*”. The output will contain a single row for any combination of keys; the “*Result*” column will contain the count of selected “*Source*” column in different rows for the same keyset. It can be used for instance to count associated objects for a master object.

#### 1.2.5.4 *Sum Values In Rows*

The “*Sum Values In Rows*” Transformation applies if it is required to sum the *numerical values in a selected column for several rows*. The user must choose one or more columns to be the “*Key (for data aggregation)*”, a column to be the “*Source column (to sum values from)*” and a third column to be the “*Result*”. The output will contain a single row for any combination of keys; the “*Result*” column will contain the sum of values in the selected “*Source*” column in different rows (non numerical values will be skipped).

---

#### 1.2.5.5 *Sum Values In Columns*

The “*Sum Values In Column*” Transformation applies if it is required to sum the *numerical* values in selected *columns for one single rows*. The user must choose one or more columns to be the “*Source column (to sum values from)*” and another column to be the “*Result*”. The “*Result*” column will contain the sum of values in the selected “*Source*” columns in same row (non numerical values will be skipped).

#### 1.2.5.6 *Divide Values In Two Columns*

The “*Divide Values In Columns*” Transformation applies if it is required to get the division between values in two columns of a dataset . The user must choose one column to be the “*Numerator*“, a column to be the “*Denominator*” and a third column to be the “*Result (number)*” or “*Result (percent)*”. The output will contain in the “*Result*” column the division between values in “*Numerator*” and “*Denominator*” columns in the selected format (non numerical values will produced a blank result).

#### 1.2.5.7 *Two Levels Aggregation*

The “*Two Levels Aggregation*” Transformation applies if it is required to sum the *numerical* values in a selected *column for several rows, with two different levels of aggregation*.

The user must choose one column to be the “*Key (for first level aggregation)*“, a column to be the “*Result (for first level aggregation)*“, a column to be the “*Key (for second level aggregation)*“, a column to be the “*Result (for second level aggregation)*“, and a column to be the “*Source column (to sum values from)*”. The output will contain a single row for any combination of keys; the “*Result (for first level aggregation)*” column will contain the sum of values in the selected “*Source column (to sum values from)*” column in different rows, given a single “*Key (for first level aggregation)*” value, and the “*Result (for second level aggregation)*” column will contain the sum of values in the selected “*Source column (to sum values from)*” column in different rows, given a single “*Key (for second level aggregation)*” value (non numerical values will be skipped).

*Typical use case:* A model contains a technical chain from server with number of CPU, associated to IT services, associated with application, aggregated in platforms: exporting the two intersection object types, and using the “Sum Values in Rows” for association between servers (with CPU) and IT Services, collecting the CPU for IT Service in the first dataset (association between platform and application), using the IT service as key in “Match keys and pick values” transformation, this output can be obtained:

Platform	CPU per Platform	Application	CPU per Application
Billing&Credit Management	6730	CELLOM 2.0	92
Billing&Credit Management	6730	ADM Credit Care	52
Billing&Credit Management	6730	SAP IS-U QW	1222
Billing&Credit Management	6730	SAP IS-U IB	1222
Billing&Credit Management	6730	SAP IS-U EC	1346
Billing&Credit Management	6730	SAP IS-U EB	1346
Billing&Credit Management	6730	SAP IS-U EG	1346
Billing&Credit Management	6730	CREDIT CARE IRW	52
Billing&Credit Management	6730	CELLOM 1.0	52
Business Intelligence	3527	BI 2.0	1819
Business Intelligence	3527	Operational Intelligence	720
Business Intelligence	3527	SAP Process Mining	15
Business Intelligence	3527	SAP LT Replication Server	973
CRM	222	CCU FYN 3.0	100
CRM	222	CCU FYN 1.0	100
CRM	222	HU	22

## 1.2.6 Custom Transformation

If it is required to apply a custom transformation the user must define a specific XSLT Library using the XSLT Library Configuration Tool (see before).

The user may define a “**CC Uncompliant**” or “**CC Compliant**” (compliant to CC schema) XSLT Library item.

Please note that the “**CC uncompliant**” custom transformation can't be followed by any other transformation and the workflow operation can only be set to “File Adapter”.

“**CC compliant**” transformations are instead not subject to any constraint (besides adhering to CC internal XML schema) when used in workflow transformations.

A number of “CC uncompliant” transformations are included, producing a formatted workflow:

- 
- CC2CSV: produces a csv output file
  - CC2HTML
  - CC2EXCEL: produces a MS Excel compatible file via XSLT, so that it can be slightly customized
  - CC2MSEXCEL: produces an XLSX file through Excel API, not configurable
  - CC2OGFF: Produces an Open Group File Format XML output file. Note that this additionally requires the application of a fixed value field (*OGFF\_Type*) specifying the target object type.

A special third type is “**CM Compliant**” transformations, which means that the output file is an XML ready to be consumed by the import module CM4Collector (i.e. describing target model, operation, objects metamodel, identity constraints, maps and object instances to be uploaded). Using that one, all the user interface setting for operation will be skipped at workflow execution time.

Please note that saving the entire workflow using the “Save” button will also save the selected transformations.

It’s possible to insert more than one transformation in the same workflow of the same type or of different types. The transformation defined in a workflow will be displayed in the section “Transformation” in the left middle section of the Workflow window.

It’s possible to select one of these transformations to delete it; if the user deletes a transformation in a workflow, the mapping rules applying to the fields that are no longer required (i.e. created by that transformation) will also be deleted.

### 1.3 Operation

To define the operation of a Workflow follow the steps in the section “Mapping and Operation”:

- Select the operation in the “with operation” drop-down list.
- Optionally, provide the email configuration parameters (see specific chapter for details)

According to the rules of the operation type, the Mapping and Operation section shows the requested parameters as described below.

#### 1.3.1 Load in CM Repository

In the “Model Name” field you can see the model linked to the selected configuration.

The user may proceed with the mapping operation in the mapping table, having the requested parameters described in the following list:

**Column Name:** shows the columns coming from the data source and from the transformation steps; a sequence number that the system assigns to each data source can be seen as prefix to the column name, so the user can easily recognize the source of the data, in the case of multiple data sources.

**Column type and format:** choose the type and format of the column of the source (String, numeric, boolean, date). This is important if user wants DT to perform a re-format operation on the target column data type.

Column Name	Type	Object types	Mapping (Properties/Associations)	Type	Action	KeySel	No new
1 <Application> Category	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 <Application> Number	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 <Application> TCO	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 <IT Portfolio> Name	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 <IT Portfolio> Total T...	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
2 Name	Gener...	Application	<OBJ NAME> Name	Single-line t...		<input type="checkbox"/>	<input type="checkbox"/>
2 Category	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
2 <Application> Name	Gener...	Application	<OBJ NAME> Name	Single-line t...		<input type="checkbox"/>	<input type="checkbox"/>
2 <Application> Category	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
2 <Application> Code	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
2 <IT Portfolio> Name	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
2 <IT Portfolio> Category	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
2 <IT Portfolio> Creatio...	Gener...	<SEP COLUMN>	<SEP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>

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In particular, to properly import *date fields* with DT, it's important to follow the following rules.

First, it's helpful to configure the query/file in order to have preformatted source data.

In particular, dates coming from data sources that are mapped onto *CM datetime* property types have to be one of the following:

- *DD/MM/YYYY* i.e. *31/08/2016* (*EUR FORMAT*)
- *MM/DD/YYYY* i.e. *08/31/2016* (*USA FORMAT*)
- *YYYY-MM-DD* i.e. *2016-08-31* (*UTC FORMAT*)

while time, when provided, has to be mandatory in the format:

- *HH24:mm:ss*

This input date format has to be set in workflow mapping step:

2 <IT Portfolio> Category	Generic string	<SKIP COLUMN>	<SKIP COLUMN>		<input type="checkbox"/>	<input type="checkbox"/>
2 <IT Portfolio> Creation Date	Date in EUR forma...	Application	<PROPERTY> Cr...	Date / Time	<input type="checkbox"/>	<input type="checkbox"/>

**Model object type:** choose the model object type to load the data; it's possible to select different object types in the same operation

**Mapping (prop./assoc.):** once you have selected the object type you can map the property or the association between the ones defined in CM for that object type. Please be sure that the "Name" property of an object type is always mapped, in order to allow DT to identify the object instance to work with (except for Association Types imports, see later). Please take into consideration that you can map Unique ID to keep the values when moving objects from a model to another.

**Type:** shows the type of the mapped column of the target (String, numeric, boolean, date)

**Action:** user can now choose what to do for a single attribute/association mapping. This means that:

- For multiline property: the user can choose between APPEND, REPLACE or EMPTY model values

- 
- For other data type properties: the user can choose EMPTY model values (not for Name or ID)
  - For association type: user can choose between MERGE, REPLACE or EMPTY model values
  - For property types:
    - o UUID
    - o Created By
    - o Creation Date
    - o Updated by
    - o Updated Date

user is requested to choose between two Actions: KEEP TARGET (default) and KEEP SOURCE.

KEEP TARGET: target object property is maintained regardless of what is mapped from the user (the property is skipped)

KEEP SOURCE: target object property is overridden with source property

UUID, Creation Date and Created By properties, can be retained only if you are creating a new object in the target models and therefore cannot be updated if the object already exists.

KEEP SOURCE action should be used in a federated models environment and is also supported by [Synch in CM Repository](#)

**Unique Key:** users must check, for all the mapped object types, which set of columns must be considered as the unique keyset when performing the upload of the data. Keep in mind that this setting will work according to the usual Corporate Modeler behaviour, where “Name” has to be unique in the object type instances list, while mapping ID or Unique ID allows object name to be updated. For example, the user may check “Name” as key, and all other properties/associations of

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an existing object with that name will be updated, or a new object with that name will be created by DT if it is not already in use, or will concatenate it with a sequence number.

Any other mapped column can be included in the keyset, without the “name” – in this case, if an object is identified by the configured keyset, DT will try to update the name with the uniqueness rules described above.

**No New:** when importing data from an external source, it’s possible that the master list of objects involved in the operation is the one contained in the model. In such a case, the user would want existing objects to be updated (only for the properties used in mapping), but no new objects to be created. If so, user may choose to check “No New” option, on the keyset of the master object type, and this will prevent new objects to be created, while existing will be updated within bounds of mapped properties. The same applies when the object list which has not to be extended is the one related to an object type associated with the master, involved in the operation. In such a case, the user may choose to check the “No New” option, on the record related to the association, and this will prevent new associated objects from being created.

As a result for this operation, data coming from the source adapter will be transformed as defined in “Transformation” step and uploaded into specified model according to the defined mapping rules.

Some additional requirements apply to specific kind of operations, as follows.

1. In case of “*All Objects*” type of associations, differently from other type of associations, the target object type has to be specified, allowing a proper execution of data import. To do this, after mapping a source column to an association to all object, it is then mandatory to map one more specific column:

- **TARGET\_OBJTYPE:** scriptname of the **object type** at the other side of the “all object” association with the same name, which user wants the objects to belong

Column Name	Type	Object ty...	Mapping (Properties/Associations)	Type	Action	KeySet	No new
<Application> Category	Generic string	<SKIP ...	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<Application> Number of ...	Generic string	<SKIP ...	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<Application> TCO	Generic string	<SKIP ...	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Itame	Generic string	CW User	<ASSOCIATION> All Objects (has as...		Replace	<input type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Total TCO	Generic string	<SKIP ...	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>

To help this mapping, the tooltip of Model Object type, when selecting one, is equal to the SCRIPTNAME of the selected.

Type	Object type	Mapping
Generic string	<SKIP COLUMN>	<SKIP COL
Generic string	<SKIP COLUMN>	<SKIP COL
Generic string	<SKIP COLUMN>	<SKIP COL
Generic string	CW User	<SCRIPT CO
Generic string	<SKIP COLUMN>	<SKIP COL
Generic string	AppObject_1	<SCRIPT NA
Generic string	Association_A	<SKIP COL
Generic string	Association_A	<SKIP COL
Generic string	Association_B	<SKIP COL
Generic string	Association_C	<SKIP COL
Generic string	Association_D	<SKIP COL
Generic string	Association_E	<SKIP COL

This can be added in the source with a fixed value field, with scriptname value, to be then used in mapping.

- In case of *multiple data source*, it is implied that the different dataset, alternatively:
  - Have to be joined, if each of them contains a subset of properties/associations information for the same Object Type. If so, the “Name” property of the object type must be mapped onto each dataset resulting in multiple “Name” mappings – this will be the field used to perform the join operation at runtime on the actual data.
  - Have to be used to map on different object types; if so, “Name” property must mapped only once for each Object Type.
- In case of *association type*, when the user wants, for instance, to import the association’s properties, it is mandatory to map four specific columns:
  - CCAboveName**: name of the object **instance** at one side of the association (the one defined as “Source Object Type” at design time)

- **CCBelowName**: name of the object **instance** at one side of the association (the one defined as “Target Object Type” at design time)
- **CCAboveTableName**: scriptname of the **object type** at one side of the association (the one defined as “Source Object Type” at design time)
- **CCBelowTableName**: scriptname of the **object type** at one side of the association (the one defined as “Target Object Type” at design time)

To help the last two mappings, the tooltip of Model Object type, when selecting one, is equal to the SCRIPTNAME of the selected.

/format	Model object types	Mapping (Pr
ic string	Referente AM	<ABOVE OE
ic string	SocietaVSOrg	<BELOW OE
ic string	Software di Infrastruttur	<PROPERTY
ic string	Software di Infrastruttura	<SKIP COLL
ic string	Standard	<PROPERTY
ic string	Subcontractor	<PROPERTY
ic string	SWInfrServizio	<PROPERTY
ic string	Technology	<PROPERTY
ic string	Utenti esterni	<PROPERTY

4. In case of *Users or User Group* import operation, which is allowed using the Admin Model configuration, the operation, will be executed within the following conditions:
  - New **users** can be created, if:
    - **User Name** and **Logon Name** are both **unique** - records which are uncompliant to this Corporate Modeler requirement are skipped at import time, and logged into the operation log file
  - **Password** cannot be provided
  - **Power Level** has to be **provided**, in a numeric form, and is documented by a tooltip:  
Users - 1 (System Manager), 2 (Project Manager), 3 (Normal User), 4 (Read Only User)
  - No new **user groups** are going to be created; user can only associate **users** to existing user groups
  - The operation **key** has to be one and only one of the following fields:

- 
- **User Name** – in that case, for existing objects, **fields** can be updated, **except for Logon Name, Power Level and Password**
  - **Logon Name** – in that case, for existing objects, **name and other fields** can be updated, except for **Power Level and Password**
  - **CW ID** - in that case, for existing objects, **name and other fields** can be updated, except for **Logon Name, Power Level and Password**

### 1.3.2 Delete in CM Repository

When selecting this operation, the only mandatory mapping is the NAME of the object type that the user wants to manage: as a result of this operation, data coming from the source adapter will be *physically deleted* in the specified model accord to the defined mapping rules, for the ones that are not diagrammed (while diagrammed ones will be listed in the operation log file).

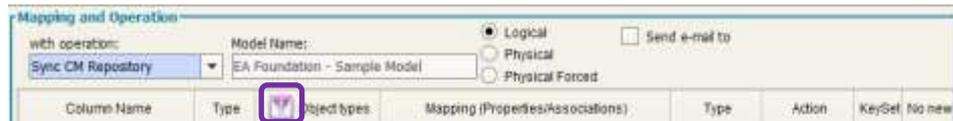
### 1.3.3 Synch in CM Repository

When selecting this operation, it is mandatory that user choose a *keyset* that's *unique in the source dataset* to avoid undesired results. In particular:

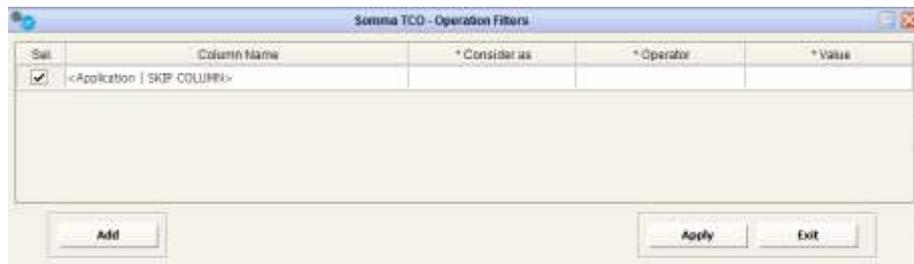
- *Objects coming from the source dataset* will be *inserted/updated* in the specified model accord to the defined mapping rules
- *Objects already in the specified model object type, that are not listed in the source dataset, will be:*
  - When “*logical*” option is set, *logically deleted*, and renamed with the prefix “\_TO\_BE\_DELETED\_”
  - When “*physical*” option is set, *physically deleted*, if not diagrammed, or renamed with the prefix “\_TO\_BE\_DELETED\_” if diagrammed
  - When “*physical forced*” option is set, *physically deleted*, even if diagrammed

If the synchronization operation must be done against a subset of objects, and not the whole set of instances (for example, when contributing external source are more than one for a given object type, each one managing a set of instances, like a CMDB providing data for “Applications in Production environment”), this can be managed using the **sync filters** interface.

Double clicking on the “filter” icon on object type column name

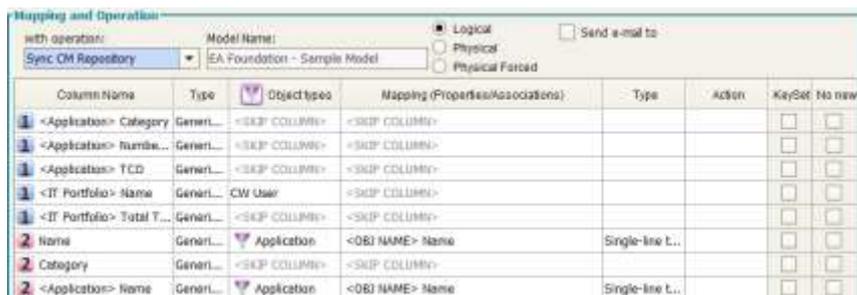


Opens a popup window allowing the creation of sync filters and showing previously defined filters:



User can add, delete (uncheck the filters to be deleted) and apply desired filters.

When the sync operation is defined to be executed according to filters, the involved object type name will be marked with a specific filter icon in the map table, the name will be plain otherwise:



For filtered sync option, the load step will follow the usual behavior, while the deletion of redundant object instances will be done within the filtered subset on objects compliant with the filters.

### 1.3.4 POST to EA Agile

In the “Workspace Name” the name of target workspace will be shown.

Column Name	Type	Object types	Mapping (Properties/Associations)	Type	Action	Key/Set	No new
1 ID_APPLICATION	Generi...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 COD_APPLICATION	Generi...	Application comp...	<ASSOCIATION> Requirement (realizes)	Relationship		<input type="checkbox"/>	<input type="checkbox"/>
1 TXT_APPLICATION_N...	Generi...	Application comp...	<OBJ NAME> Name			<input checked="" type="checkbox"/>	<input type="checkbox"/>
1 DESCR_APPLICATION	Generi...	Application comp...	<PROPERTY> Description		Replace	<input type="checkbox"/>	<input type="checkbox"/>
1 ID_STATE	Generi...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 DE_STATE	Generi...	Application comp...	<PROPERTY> Lifecycle status			<input type="checkbox"/>	<input type="checkbox"/>
1 TXT_SERVICE_NAME	Generi...	Application comp...	<ASSOCIATION> Goal (influences)	Relationship	Replace	<input type="checkbox"/>	<input type="checkbox"/>

User may proceed with the mapping operation in the mapping table, having the requested parameters described in the following list:

**Column Name:** shows the columns coming from the data source and from the transformation steps; a sequence number that the system assigns to each data source can be seen as prefix to the column name, so the user can easily recognize the source of the data, in the case of multiple data sources.

**Column type and format:** choose the type and format of the column of the source (String, numeric, boolean, date). This is important if user wants DT to perform a re-format operation on the target column data type.

#### Date in UTC format

##### Date / Datetime

The following ISO-8601 formats are supported:

- YYYY-MM-DD (e.g. 2019-01.28)
- YYYY-MM-DDThh:mm (e.g. 2019-01-28T01:02)
- YYYY-MM-DDThh:mm:ss (e.g. 2019-01-28T01:02:03)
- YYYY-MM-DDThh:mm:ssTZD (e.g. 2019-01-28T01:02:03+04:05)

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When positing to EA Agile, if a time and offset are not provided, these will default to 00:00Z (i.e. 00:00+00)

### Date Ranges

For the supported UTC date formats outlined above, DT supports the following separators:

- \$UTCDATE/\$UTCDATE
- \$UTCDATE,\$UTCDATE
- \$UTCDATE;\$UTCDATE
- start:\$UTCDATE end:\$UTCDATE
- start: \$UTCDATE end: \$UTCDATE

### **Date in EUR format**

#### Date / Datetime

The following formats are supported:

- dd/MM/yyyy (e.g. 28/01/2019)
- dd/MM/yyyy HH24:mm (e.g. 28/01/2019 13:01)
- dd/MM/yyyy HH24:mm:ss (e.g. 28/01/2019 13:01:02)
- dd/MM/yyyy HH:mm AM/PM (e.g. 28/01/2019 01:01 PM)
- dd/MM/yyyy HH:mm:ss AM/PM (e.g. 28/01/2019 01:01:02 PM)
- dd/MM/yyyy HH:mmAM/PM (e.g. 28/01/2019 01:01PM)
- dd/MM/yyyy HH:mm:ssAM/PM (e.g. 28/01/2019 01:01:02PM)

### Date Ranges

For the supported EUR date formats outlined above, DT supports the following date range formats:

- start:\$EURDATE end:\$EURDATE
- start: \$EURDATE end: \$EURDATE
- \$EURDATE;\$EURDATE
- \$EURDATE,\$EURDATE

## Date in USA format

### Date / Datetime

The following formats are supported:

- MM/dd/yyyy (e.g. 01/28/2019)
- MM/dd/yyyy HH24:mm (e.g. 01/28/2019 13:01)
- MM/dd/yyyy HH24:mm:ss mm (e.g. 01/28/2019 13:01:02)

### Date Ranges

Dates ranges may be formatted as:

- start:\$USADATE end:\$USADATE
- start: \$USADATE end: \$USADATE
- \$USADATE;\$USADATE
- \$USADATE,\$USADATE

This input date format has to be set in workflow mapping step:

2	<IT Portfolio> Category	Generic string	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
2	<IT Portfolio> Creation Date	Date in EUR forma...	Application	<PROPERTY> Cr...	Date / Time		<input type="checkbox"/>	<input type="checkbox"/>

**Object type:** choose the model object type to load the data; it's possible to select different object types in the same operation

**Mapping (prop./assoc.):** once you have selected the object type you can map the property or the association between the ones defined in EA Agile for that object type. Please be sure that the "Name" property of an

object type is always mapped, in order to allow DT to identify the object instance to work with (except for Association Types imports, see later).

About **associations** mappings, multiple values can be associated putting the different values in a single cell, **newline** separator. Other separators can be replaced with “Data Formatting: Replace Text”:

Sel.	Column Name	* Text to be replaced	* Replace with
<input type="checkbox"/>	1 name		
<input type="checkbox"/>	1 business_criticality		
<input type="checkbox"/>	1 service_classification		
<input checked="" type="checkbox"/>	1 managed_by	:	\n

If an association is of “composition” type, like “Entity is part of Data Model”, the action “set as parent” must be selected from drop down list in order to properly identify objects parent in the platform.

1	ENTITY_NAME	Generi...	Entity	<OBJ NAME> Name	String		<input checked="" type="checkbox"/>	<input type="checkbox"/>
1	SCHEMATA/TABLES_NA...	Generi...	Entity	<ASSOCIATION> Data Model (is part of)	Composition	Set as parent	<input type="checkbox"/>	<input type="checkbox"/>

**Type:** shows the type of the mapped column of the target (String, numeric, boolean, date). To help the user in mapping, in case of list or key values allowed values are shown in the “type” cell tooltip:

1	DE_STAT	Generi...	Application compo...	<PROPERTY> Lifecycle status	List			
1	TXT_SERVICE_NAME	Generi...	Application component	<ASSOCIATION> Goal (Influences)	Relative	Proposed in Development, Use, Phasing Out, Retired, Proof of Concept, Pilot, Implementation		

**No New:** when importing data from an external source, it’s possible that the master list of objects involved in the operation is the one contained in the workspace. In such a case, the user would want existing objects to be updated (only for the properties used in mapping), but no objects from being created. If so, the user may choose to check the “No New” option, on the keyset of the **master object type**, and this will prevent new objects from being created, while existing will be updated within bounds of mapped properties.

The same applies when the object list which has not to be extended is the one related to an object type **associated with the master**, involved in the operation. In such a case, user may choose to check “No New” option, on the record related to the association, and this will prevent new associated objects from being created.

### 1.3.5 Delete in EA Agile

When selecting this operation, user should map only the “**Name**” of the object type that he wants to manage: as a result of this operation, data

coming from the source adapter will be deleted in the specified workspace according to the defined mapping rules.

### 1.3.6 POST to EA Agile V3

In the “Workspace Name” the name of target workspace will be shown (“Default”).

User may proceed with the mapping operation in the mapping table, having the requested parameters described in the following list:

**Column Name:** shows the columns coming from the data source and from the transformation steps; a sequence number that the system assigns to each data source can be seen as prefix to the column name, so the user can easily recognize the source of the data, in the case of multiple data sources.

Column Name	Type	Object types	Mapping (Properties/Associations)	Type	Action	KeySet	No new
1 name	Generi...	System	<OBJ NAME> Name	String		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1 business_criticality	Generi...	System	<PROPERTY> Notes	String		<input type="checkbox"/>	<input type="checkbox"/>
1 service_classification	Generi...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 managed_by	Generi...	System	<ASSOCIATION> Person (has SME)	Relationship	Replace	<input type="checkbox"/>	<input type="checkbox"/>
1 owned_by	Generi...	System	<ASSOCIATION> Person (owned by)	Relationship	Replace	<input type="checkbox"/>	<input type="checkbox"/>
1 change_control	Generi...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 location	Generi...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 operational_status	Generi...	System	<PROPERTY> Status	List (Single)		<input type="checkbox"/>	<input type="checkbox"/>
1 sys_id_display	Generi...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 SN URL	Generi...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 URL	Generi...	System	<PROPERTY> CMDB link	URL		<input type="checkbox"/>	<input type="checkbox"/>

**Column type and format:** choose the type and format of the column of the source (String, numeric, boolean, date). This is important if user wants DT to perform a re-format operation on the target column data type.

#### Date in UTC format

#### Date / Datetime

The following ISO-8601 formats are supported:

- YYYY-MM-DD (e.g. 2019-01.28)
- YYYY-MM-DDThh:mm (e.g. 2019-01-28T01:02)

- 
- YYYY-MM-DDThh:mm:ss (e.g. 2019-01-28T01:02:03)
  - YYYY-MM-DDThh:mm:ssTZD (e.g. 2019-01-28T01:02:03+04:05)

When posting to EA Agile, if a time and offset are not provided, these will default to 00:00Z (i.e. 00:00+00)

### Date Ranges

For the supported UTC date formats outlined above, DT supports the following separators:

- \$UTCDATE/\$UTCDATE
- \$UTCDATE,\$UTCDATE
- \$UTCDATE;\$UTCDATE
- start:\$UTCDATE end:\$UTCDATE
- start: \$UTCDATE end: \$UTCDATE

### **Date in EUR format**

#### Date / Datetime

The following formats are supported:

- dd/MM/yyyy (e.g. 28/01/2019)
- dd/MM/yyyy HH24:mm (e.g. 28/01/2019 13:01)
- dd/MM/yyyy HH24:mm:ss (e.g. 28/01/2019 13:01:02)
- dd/MM/yyyy HH:mm AM/PM (e.g. 28/01/2019 01:01 PM)
- dd/MM/yyyy HH:mm:ss AM/PM (e.g. 28/01/2019 01:01:02 PM)
- dd/MM/yyyy HH:mmAM/PM (e.g. 28/01/2019 01:01PM)
- dd/MM/yyyy HH:mm:ssAM/PM (e.g. 28/01/2019 01:01:02PM)

---

## Date Ranges

For the supported EUR date formats outlined above, DT supports the following date range formats:

- start:\$EURDATE end:\$EURDATE
- start: \$EURDATE end: \$EURDATE
- \$EURDATE;\$EURDATE
- \$EURDATE,\$EURDATE

## **Date in USA format**

### Date / Datetime

The following formats are supported:

- MM/dd/yyyy (e.g. 01/28/2019)
- MM/dd/yyyy HH24:mm (e.g. 01/28/2019 13:01)
- MM/dd/yyyy HH24:mm:ss mm (e.g. 01/28/2019 13:01:02)

## Date Ranges

Dates ranges may be formatted as:

- start:\$USADATE end:\$USADATE
- start: \$USADATE end: \$USADATE
- \$USADATE;\$USADATE
- \$USADATE,\$USADATE

2	<IT Portfolio> Category	Generic string	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
2	<IT Portfolio> Creation Date	Date in EUR forma...	Application	<PROPERTY> Cr...	Date / Time		<input type="checkbox"/>	<input type="checkbox"/>

**Object type:** choose the model object type to load the data; it's possible to select different object types in the same operation

**Mapping (prop./assoc.):** once you have selected the object type you can map the property or the association between the ones defined in EA Agile V3 for that object type. Please be sure that the “**Name**” property of an object type is always mapped, in order to allow DT to identify the object instance to work with (except for Association Types imports, see later).

About **associations** mappings, multiple values can be associated putting the different values in a single cell, **newline** separator. Other separators can be replaced with “Data Formatting: Replace Text”:

Set	Column Name	* Text to be replaced	* Replace with
<input type="checkbox"/>	name		
<input type="checkbox"/>	business_criticality		
<input type="checkbox"/>	service_classification		
<input checked="" type="checkbox"/>	managed_by	;	\n

If an association is of “composition” type, like “Entity is part of Data Model”, the action “set as parent” must be selected from drop down list in order to properly identify objects parent in the platform.

ENTITY_NAME	Generi...	Entity	<OBJ NAME> Name	String		<input checked="" type="checkbox"/>	<input type="checkbox"/>
SCHEMATABLES_HA...	Generi...	Entity	<ASSOCIATION> Data Model (is part of)	Composition	Set as parent	<input type="checkbox"/>	<input type="checkbox"/>

**Type:** shows the type of the mapped column of the target (String, numeric, boolean, date). To help the user in mapping, in case of list or key values allowed values are shown in the “type” cell tooltip:

DE_STATE	Generic... Application compo...	<PROPERTY> Lifecycle status	List				
TXT_SERVICE_NAME	Generic... Application component	<ASSOCIATION> Goal (influences)	Reflector				Proposed, in Development, Live, Phasing Out, Retired, Proof of Concept, Pilot, Implementation

**No New:** when importing data from an external source, it’s possible that the master list of objects involved in the operation is the one contained in EA Agile V3 workspace. In such a case, the user would want existing object to be updated (for the only properties used in mapping), but no objects to be created. If so, user may choose to check “No New” option, on the keyset of the **master object type**, and this will prevent new objects to be created, while existing will be updated within bounds of mapped properties. The same applies when the object list which has not to be extended is the one related to an object type **associated with the master**, involved in the operation. In such a case, user may choose to check “No New” option, on the record related to the association, and this will prevent new associated objects to be created.

### 1.3.7 Delete in EA Agile V3

When selecting this operation, user should map only the “**Name**” of the object type that he wants to manage: as a result of this operation, data coming from the source adapter will be deleted in the specified workspace according to the defined mapping rules.

### 1.3.8 Send to File Adapter

The screenshot shows the 'Mapping and Operation' dialog box. It has a title bar 'Mapping and Operation'. Below the title bar, there are two dropdown menus: 'with operation:' set to 'Send to File Adapter' and 'Choose Adapter' set to 'MANAGER FOLDER'. Below these, there is a text input field for 'Optional output file naming convention, without extension:' containing 'APPandVendorsEXCEL'. To the right of this field is a checked checkbox labeled 'Overwrite file'.

- Choose the *File Adapter* in the “Choose Adapter” drop-down list (only the “PUT” File Adapter will be available in the list)
- Optionally, define a customized name for the output file, without the extension (it will be *.xml*, if no final custom transformation is applied; it will be *.csv*, if *Custom transformation (CC uncompliant):CC2CSV* transformation is applied, or *.xls*, for *Custom transformation (CC uncompliant):CC2EXCEL*, or *.html*, for *Custom transformation (CC uncompliant):CC2HTML*, etc). Moreover, the user can choose between overwriting file if existing, or have a different file for different executions (in this case, the name will be post fixed with a timestamp)

As a result of this choice, data coming from the source adapter will be transformed as defined in “Transformation” step and sent to the File Adapter folder. When completed it will be delivered to the destination.

### 1.3.9 Send to DB Loader

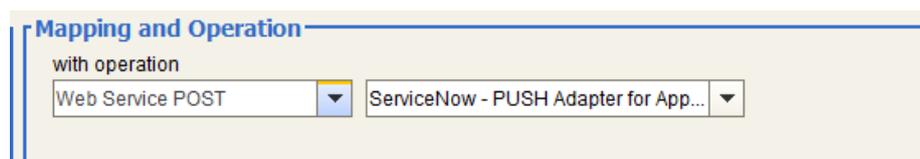
The screenshot shows the 'Mapping and Operation' dialog box for 'Send to DB Loader'. It has a title bar 'Mapping and Operation'. Below the title bar, there are two dropdown menus: 'with operation:' set to 'Send to DB Loader' and 'Choose Adapter' set to 'MYSQL LOADER'. To the right of these are two checkboxes: 'Send e-mail to' (unchecked) and 'Single email for record' (unchecked). Below these, there is a text input field for 'Table to be updated:' containing 'services' and a dropdown for 'Key field for this operation:' set to 'ID\_SERVICE'. To the right of this is a checked checkbox labeled 'No new (only updates)'. Below these fields is a table with the following data:

Object field	Object type	Table column	FK table	FK match column	FK key column
1 Name	Generic string	TXT_SERVICE_NAME			
1 Id	Generic string	ID_SERVICE			
1 Status	Generic string	FK_STATE	states	DE_STATE	ID_STATE
1 Updated Date	Generic string	<SKIP COLUMN>			

- 
- Select the *Table* to be uploaded with data, coming from the source and transformations of the workflow, among the ones owned by the user specified at DB Loader Adapter configuration time.
  - Select the *Key column* among the ones describing the Table, to be used to allow DT to properly perform an “INSERT” or “UPDATE” SQL command at runtime, for any given field value occurrence in input data.
  - Then, for each input column name the user may alternatively:
    1. Map onto a specified column of the previously chosen table, when the input value is natively hosted by that
    2. Map onto a specified column of the previously chosen table, when this contains the foreign key of another table in the same database, actually containing the input values, providing:
      - The name (“FK table”)
      - The column hosting the input values (“FK match column”)
      - The column hosting the foreign keys for given table (“FK key column”)
  - The option “*No New (only updates)*” allows user to set import operation to be limited to updates on selected table

As a result of this choice, data coming from the source adapter will be transformed as defined in “Transformation” step and sent to the DB Loader Adapter for the upload operation previously defined.

### 1.3.10 Web Service POST



- Choose the *Web Service POST Adapter* in the “Choose Adapter” drop-down list (only the Web Service “POST” Adapters will be available in the list)

As a result of this choice, data coming from the source adapter will be transformed as defined in “Transformation” step and sent to the Web Service, as defined in its configuration.

### 1.3.7 Evolve Site Import

Column Name	Type	Object types	Mapping (Properties/Associations)	Type	Action	KeySet	N.
1 <Application> Category	Gener...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 <Application> Num...	Gener...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 <Application> TCO	Gener...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
1 <IT Portfolio> Name	Gener...	IT Portfolio	<OBJ NAME> Name	Single-line t...		<input checked="" type="checkbox"/>	<input type="checkbox"/>
1 <IT Portfolio> Total T...	Gener...	IT Portfolio	<PROPERTY> Total TCO	Whole num...		<input type="checkbox"/>	<input type="checkbox"/>

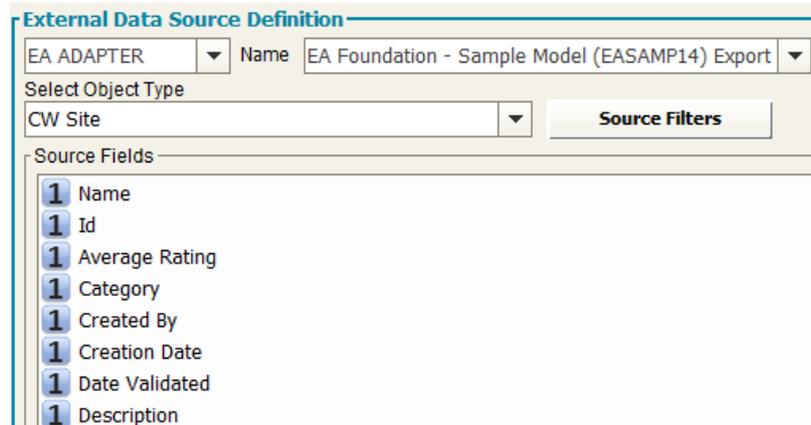
In order to copy Evolve sites from model to model, you should consider that:

- A target site has to be created before executing the operation
- Only the following components are copied from source model to target model: Menu, Index Pages, Object Pages, Diagram Popouts, Diagram Designer Layouts
- If you want to manage Diagram Designer Layouts you should enable target model with Diagram Designer
- If any objects is already defined in the target site it will be overwritten
- It is recommended that all the pages linked to source Evolve site, should not be associated to other Evolve sites

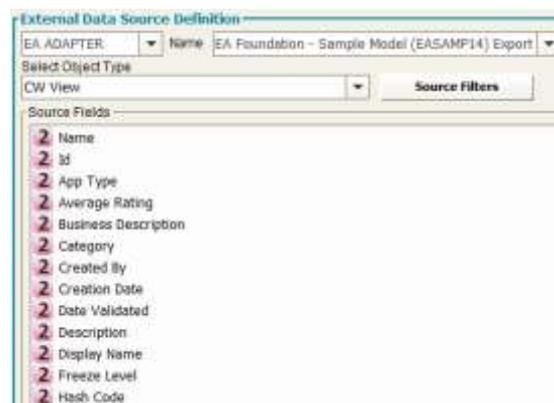
The following instructions have to be followed in order to copy an Evolve Site. It is recommended to back up your target model before the operation, as a bad configuration may result in a loss of information.

- 1 Create a new workflow configuration on your target model configuration

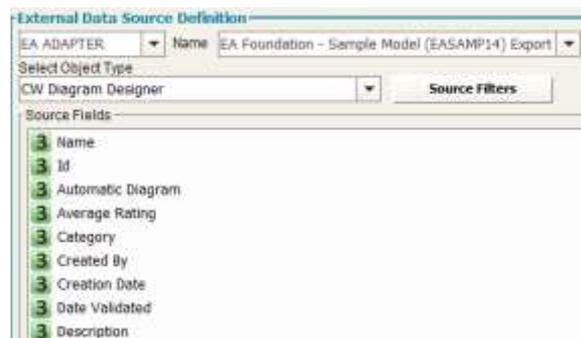
- 2 Select as source EA Adapter and select the export adapter related to your source model
- 3 Select **CW Site** as object type and filter only Name and Description properties



- 4 Add a second source EA Adapter and select the export adapter related to your source model: select **CW View** as object type and filter the following properties/associations:
  - a. Name
  - b. App Type
  - c. Business Description
  - d. Category
  - e. Description
  - f. Display Name
  - g. Hash Code
  - h. Root Object Type
  - i. CW Site (belongs to (index))
  - j. CW Site (belongs to (single))
  - k. CW Site (belongs to (diagram pop out))



- 
- 5 (Optionally, only if you want to copy **Diagram Designer Layouts**) Add a third source EA Adapter, select the export adapter related to your source model and filter the following properties:
- Name
  - Automatic Diagram
  - Category
  - Description
  - Enabled Version
  - Root Object Type



- 6 Add a Fixed Value Manager transformation on the following columns:

Src. Number	Column Name	Consider as	Operator	Value
1	Name	String	Equal	source_site_name

2	CW Site (belongs to (index))	String	In (semicolon separated)	;source_site_name*
2	CW Site (belongs to (single))	String	In (semicolon separated)	;source_site_name*
2	CW Site (belongs to (diagram popout))	String	In (semicolon separated)	;source_site_name*

\*: use semicolon in value cell as specified

## 7 Add a Replace Text transformation on the following columns:

Src Number	Column Name	Text to be replaced	Replace with
1	Name	source_site_name	target_site_name
2	CW Site (belongs to (index))	source_site_name	target_site_name
2	CW Site (belongs to (single))	source_site_name	target_site_name
2	CW Site (belongs to (diagram popout))	source_site_name	target_site_name

## 8 Choose the operation **Evolve Site Import** that will automatically map all needed fields

Column Name	Type	Object types	Mapping (Properties/Associations)	Type	Action	Key/Set
1 Name	Generic ...	CW Site	<OBJ NAME> Name	Single-line text		<input checked="" type="checkbox"/>
1 Description	Generic ...	CW Site	<PROPERTY> Description	Multi-line text		<input type="checkbox"/>
2 Name	Generic ...	CW View	<OBJ NAME> Name	Single-line text		<input checked="" type="checkbox"/>
2 App Type	Generic ...	CW View	<PROPERTY> App Type	Drop-down list		<input type="checkbox"/>
2 Business Description	Generic ...	CW View	<PROPERTY> Business Description	Multi-line text		<input type="checkbox"/>
2 Category	Generic ...	CW View	<PROPERTY> Category	Drop-down list		<input type="checkbox"/>
2 Description	Generic ...	CW View	<PROPERTY> Description	Multi-line text		<input type="checkbox"/>
2 Display Name	Generic ...	CW View	<PROPERTY> Display Name	Single-line text		<input type="checkbox"/>
2 Hash Code	Generic ...	CW View	<PROPERTY> Hash Code	Whole number		<input type="checkbox"/>
2 Root Object Type	Generic ...	CW View	<PROPERTY> Root Object Type	Single-line text		<input type="checkbox"/>
2 CW Site (belongs to (index))	Generic ...	CW View	<ASSOCIATION> CW Site (belongs to (index))		Replace	<input type="checkbox"/>
2 CW Site (belongs to (single))	Generic ...	CW View	<ASSOCIATION> CW Site (belongs to (single))		Replace	<input type="checkbox"/>
2 CW Site (belongs to (diagram popout))	Generic ...	CW View	<ASSOCIATION> CW Site (belongs to (diagram popout))		Replace	<input type="checkbox"/>

### 1.3.11 Email Configurations

The email notification allows the user to be easily aware of what's going on with DT operations, particularly for the owners of model information managed by the tool.

Notification email for the workflow operation results can be configured with a custom setting for recipients, CC recipients, email subject and message text.

---

The workflow output, in HTML format, will be attached to email. If it is not needed – for example, the workflow is configured to produce a file that will be also attached to email – the option “Attach workflow output file” should be deselected:

Attach workflow output file (HTML)

another option is provided to send email always (per default), only with data, or only on errors:

Email Always       Only with data       Only on errors

Some parameters can be used in subject or message text:

- `<%SYSDATE%>`, `<%SYSDATE_EUR%>`, `<%SYSDATE_USA%>`, `<%SYSDATE_UTC%>`: replaced at execution time with date time, using requested format.
- `<%OPERATION_FOLDER%>`: replaced at execution time workflow operation folder path.
- `<%WORKFLOW_FOLDER%>`: replaced at execution time workflow folder path.

The email can contain links to specified URL: just use “Add URL” button to have a sample link text and replace your own site address and name:

Configure message

Configure message

Email To:  
john.black@customer.com

Email CC:

Email Subject:  
Application Catalog updated - <%SYSDATE\_EUR%>

Attach workflow output file (HTML)

Email Always       Only with data       Only on errors

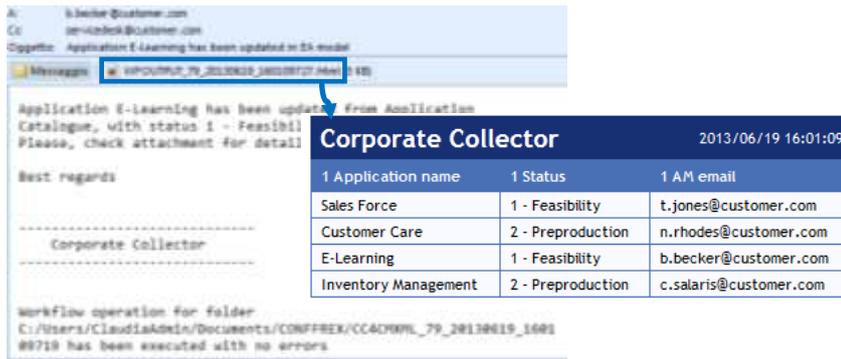
Message:  
Please, check HTML report in <%OPERATION\_FOLDER%>. Refer to: <a href='\"https://myapm.com\">Enterprise Application Catalog</a> for details. Collector Team

Add URL      OK      Exit



---

This setting, when the “*Single email for record*” option is selected, produces a single notification per source dataset record, replacing parameters with their value as read from the input.



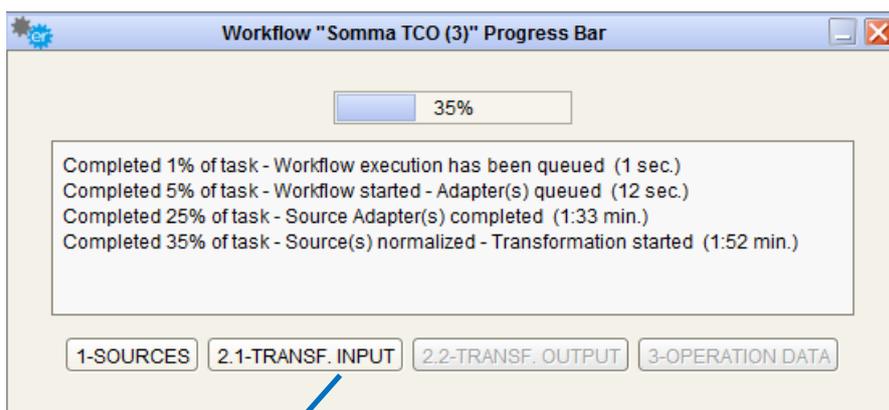
## 2 Workflow Test

Once configured, the workflow can be tested using the button “Test”, even if is not yet active.

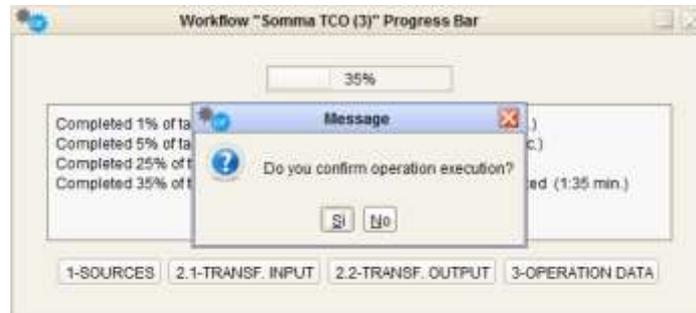
When tested, a progress bar will make the user aware of the major workflow steps:

1. Adapter execution
2. Source data normalization – to provide transformation input data
3. Transformation execution
4. Workflow output normalization – to provide data for operation

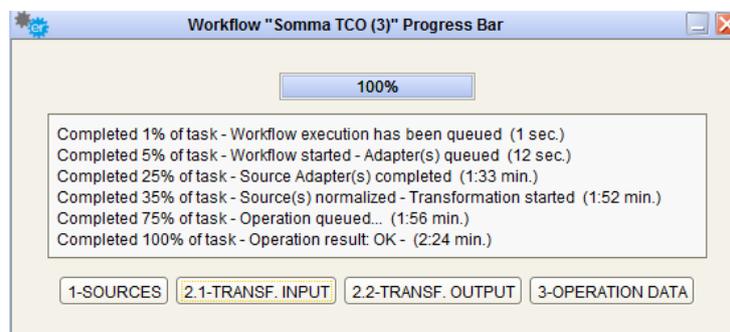
As soon as the step is performed and corresponding data is produced, a specific button makes it available to the user.



<Application> Category	<Application> Number of Users	<Application> TCO
Legacy	40	7500
ERP	402	100000
Legacy	200	78000
Middleware	150	220000
Software	150	30000
ERP	110	50000
ERP	150	7500
ERP	20	80000
Legacy	152	7500
ERP	370	200000
Software	300	65000



The user is then informed about the result of the operation execution, if requested.



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# Chapter 5

## 1 Administrator Tools

### 1.1 Execute and Schedule Jobs

The administrator tools include the scheduler, which is the engine that runs the jobs mainly related to the adapters set up by the user. The scheduler allows the user to schedule a single job; the user may define and schedule job sequences that run the desired jobs with the assigned priority.

According to the type of jobs available and the timing facilities, the user may schedule each single job (or a job sequence) with a certain frequency.

In this window the user can choose to manage the jobs available for all the configurations or to select a specific model configuration to work on the model administration jobs. In particular, selecting from the upper dropdown list:

- “*All Configurations*”, the user can schedule the Custom Job (see related section) and the Adapters (CM, WS, File and DB Adapters) which may be used by different models within their specific workflows. In this case, when an adapter is executed by the scheduler engine, an embedded workflow manager will trigger all the workflows using that adapter as its data source to execute

For each of the available Adapters, the user can set up the definition of single job to be scheduled (section “Job Scheduler”)

- *A specific model configuration name*, the user manages the scheduling of the given model administration jobs, as
  - Model backup

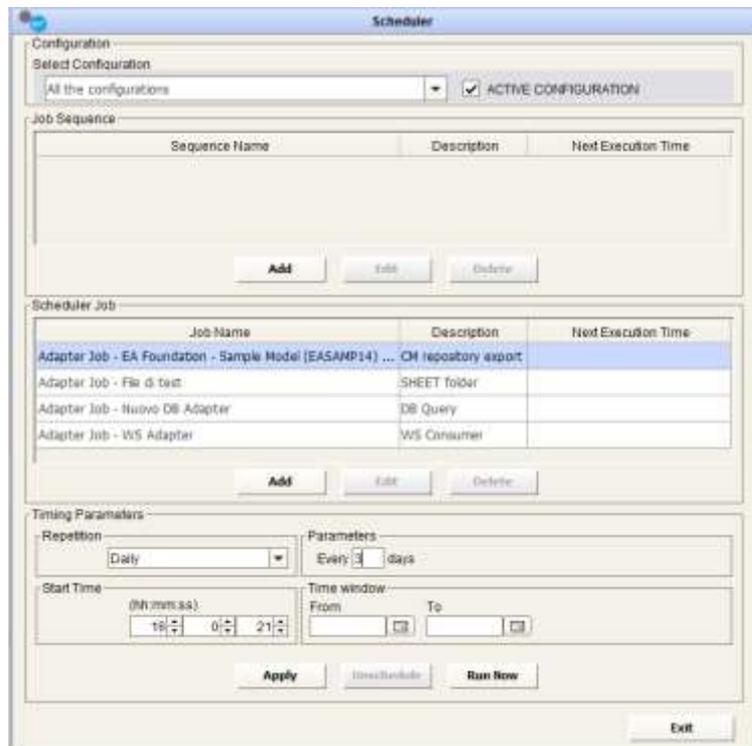
- Multisource jobs defined within that configuration workflow (thus needed only for those and not available for any other)

For each of the available model configuration, the user can set up:

- If it is active or not (checkbox “Active configuration”) – a configuration could exist even if it is not active
- The definition of single job to be scheduled (section “Job Scheduler”)
- The definition of each job sequencer (“Job Sequencer”)

### 1.1.1 Job Scheduler

For any kind of job, the user can set the scheduling time for each job after selecting it from the list.



Here are the timing parameters available:

- *Time Window* - gives the opportunity to set a date interval for job execution. The jobs are executed according to the following repetition options and set-up time field.

- *Repetition by "Minutes"* - set the repetition of a job every "xx" minutes (optionally within an hour interval).

- *Repetition "Hourly"* - set the repetition of a job every "xx" hours (12 hours in the example).

- *Repetition "Daily"* - set the repetition of a job every "xx" days (2 days in the example).

- *Repetition "Weekly"* - set the repetition of a job each "day" of the week (Sunday and Monday in the example).

- *Repetition "Monthly"* - the repetition of the job every "xx" (ordinal number) of the month (first day in the example).

- *Repetition "Once"* - schedule the job to run just once, in the specified date and accordingly to the "Start Time" field.

---

When the user has completed the scheduling configuration, the user can store the scheduling parameters in the DT database by pressing the

 button.

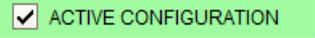
When the user presses the “Apply” button, either if they selected a job sequence or a single job, the field “Next Execution Time” (in the Job Sequencer or Job Scheduler respectively) is filled with the next expected time the job will run.

If it is required to unschedule a job, the user has to select it in the list and then press the  button.

If it is required to execute a job or a job sequencer immediately, the user has to select it in the list and then press the  button.

The  button closes the window.

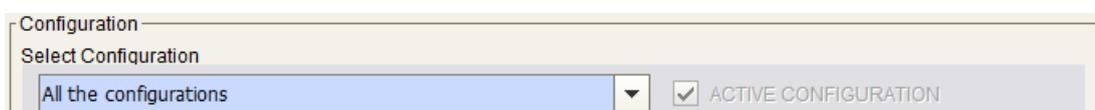
### 1.1.2 Active Configurations

If you want the scheduler to execute the jobs at the scheduled time, activate the configuration by checking the  check box. Once activated the check-box changes colour from yellow to green.

Please note that a configuration does not necessarily need to be activated in order to schedule its jobs. The user is allowed to schedule any of the jobs, but the jobs will not be executed if at the execution time the configuration is not checked as “active”.

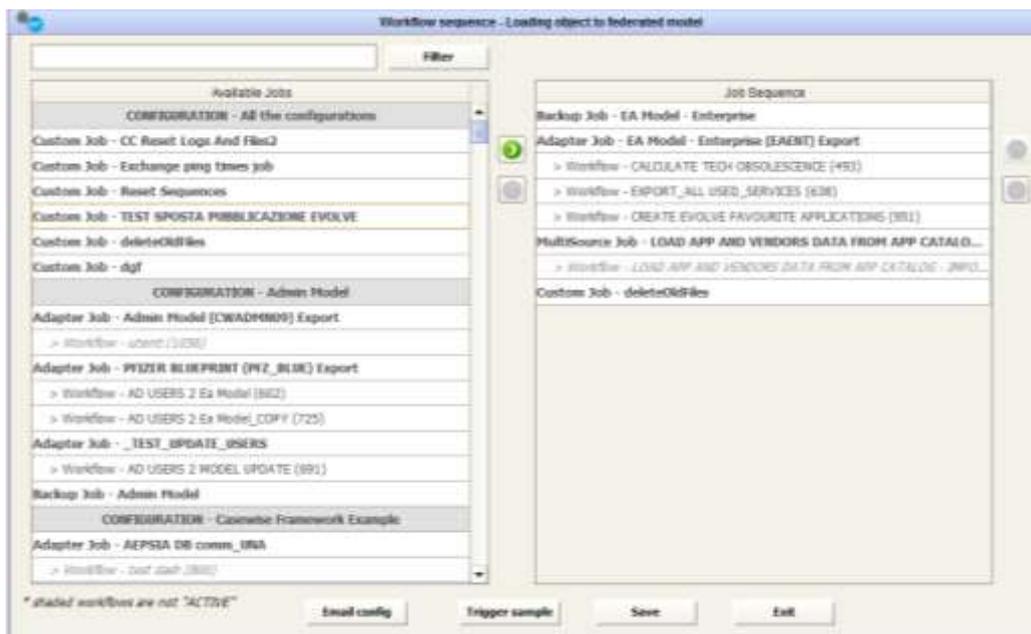


The “All the configurations” configuration is always active:



### 1.1.3 Define Jobs Sequences

The user may define job sequences, configuring *adapters and workflow* in a real *logical flow*; the user may choose between available adapters and related workflows which ones, and which order they belong in the Job Sequence:



Using right/left arrows to include/ exclude an item, and up/down arrow to change their order.

User may include more than one occurrence of adapter, with different workflows, backup and custom jobs.

You can schedule a job using the standard timing parameters: the job will result in the execution of all the adapters belonging to the job sequencer definition and all of the selected workflow, in the configured order.

Please take into consideration that if a workflow included in a sequence is set *inactive* in the workflow configuration, then it will still belong to the sequence, but it will appear "*grayed out*" in the sequence definition window, and its execution will be skipped when running the sequence itself.

---

Take into account the following internal behavior: when different workflows use source objects exported from the same model:

Job Sequencer	
Adapter Job - EA Model - Enterprise (EAENT) Export	
> Workflow - CALCULATE TECH OBSOLESCENCE (493)	
> Workflow - EXPORT_ALL_USED_SERVICES (638)	
> Workflow - EXPORT_ALL_UNUSED_SERVICES (535)	
> Workflow - CREATE EVOLVE FAVOURITE APPLICATIONS (951)	

All the different requests will be aggregated, in terms of **different object types**, and in terms of **filters** (which attributes/associations are to be exported; the definition of filters on data).

So, if the objects to be exported, all at once, are typically more than a few thousand, or the filters are conflicting, it's recommended to replicate the adapter execution, moving workflows in order to make the adapter request more efficient and avoid conflicts:

Job Sequencer	
Adapter Job - EA Model - Enterprise (EAENT) Export	
> Workflow - CALCULATE TECH OBSOLESCENCE (493)	
Adapter Job - EA Model - Enterprise (EAENT) Export	
> Workflow - EXPORT_ALL_USED_SERVICES (638)	
Adapter Job - EA Model - Enterprise (EAENT) Export	
> Workflow - EXPORT_ALL_UNUSED_SERVICES (535)	
Adapter Job - EA Model - Enterprise (EAENT) Export	
> Workflow - CREATE EVOLVE FAVOURITE APPLICATIONS (951)	

This is not mandatory and a single rule of workflow aggregation cannot be provided, as it hugely depends on the size/type of required export.

Sometimes, if DT Windows Services are forced to stop, or in case of severe internal error, sequences may enter an inconsistent state, that could stop other jobs from being executed. In that case the administrator may use the “**Reset sequences**” item in the “Tools” menu (view [Chapter 9 – Utilities](#)).

---

### 1.1.4 Multi Source Jobs

When the user in a workflow configuration defines more than one source (workflow with multi source) the system creates a “special” job named “MultiSource Job” that will be shown in the Job Sequencer and Job Scheduler sections of the specific workflow configuration:

Job Sequence		
Sequence Name	Description	Next Execution Time
Sequencer multisource	CONDITIONAL	

Scheduler Job		
Job Name	Description	Next Execution Time
Backup Job - EA Foundation - Sample Model	Backup	
MultiSource Job - Somma TCO	MultiSourceJob	

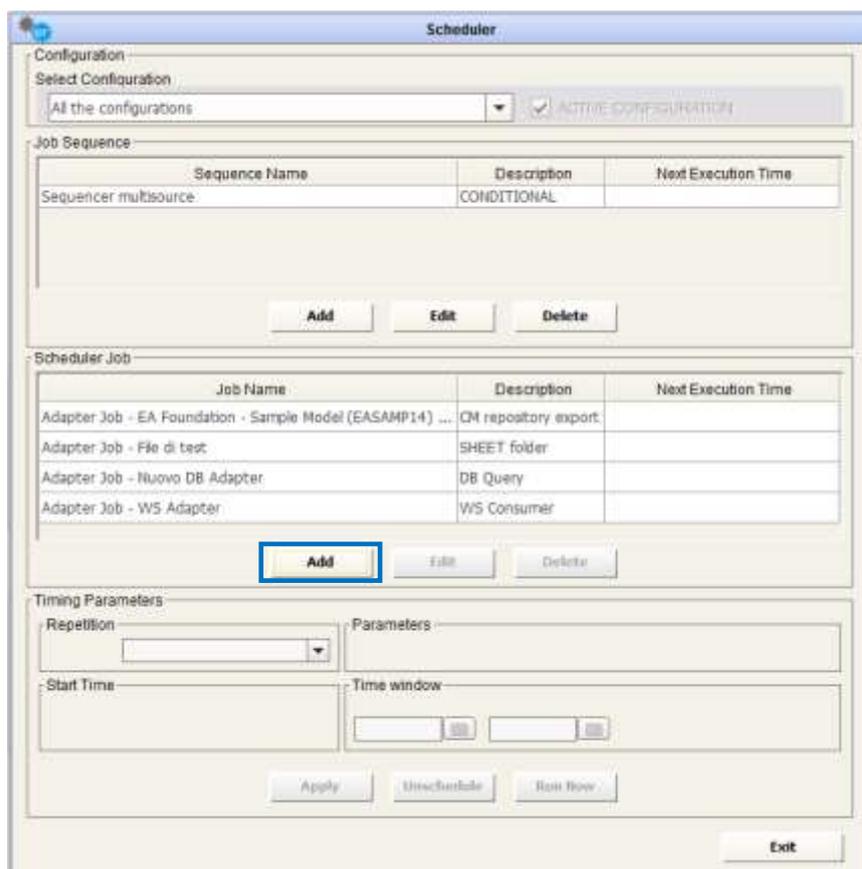
You can schedule it using the standard timing parameters: the job will result in the execution of all the adapters belonging to the source definition of the workflow that will trigger the workflow execution itself.

Workflows that have any of those adapters as single source or in a different multisource definition will not be triggered.

---

## 1.1.5 Custom jobs

If needed, users can configure a custom job, aimed to run any external executable that can be launched through a command line, using the “Add” button at the bottom of the job list, available with the “All the configurations”.



To configure a Custom Job, beside the Job Name and Description, the user must provide the environment information, such as the IP of the server in which the execution has to be launched, the username and password of a Windows account (as specified in the Windows domain) which has the grant to login to the server and run the execution.

Custom Job Configuration

Job Name:\*  
 Job Description:  
 Server IP:\*      Username:\*      Password\*  
 Executable path (server):\*  
 Parameters:  
 Wait For Return      Timeout after 0 minutes (Kill the custom job if not completed after x minutes)

Save      Test      Exit

The user must provide the physical path, including the file name, of the given execution in the server, and the optional parameters required by the execution itself, enclosed by quotes if needed, as they would be written in a command line.

Custom Job Configuration

Job Name:\*  
My custom job  
 Job Description:  
post processing jobs to complete links  
 Server IP:\*      Username:\*      Password\*  
192.168.29.18      Administrator      \*\*\*\*\*  
 Executable path (server):\*  
F:\temp\pb\postProcessing.bat  
 Parameters:  
F:\temp\output.txt  
 Wait For Return      Timeout after 1 minutes (Kill the custom job if not completed after x minutes)

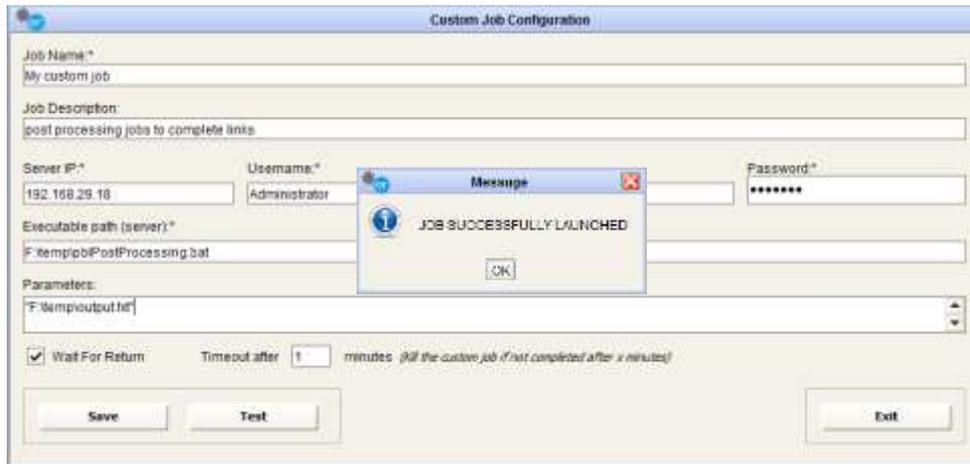
Save      Test      Exit

The option “Wait For Return” forces the process that launches the execution to be listening for the external process to end and wait for the exit code. In this case it’s mandatory to define the timeout in minutes, to avoid DT hanging, if the executable does not exit in the given elapsed.

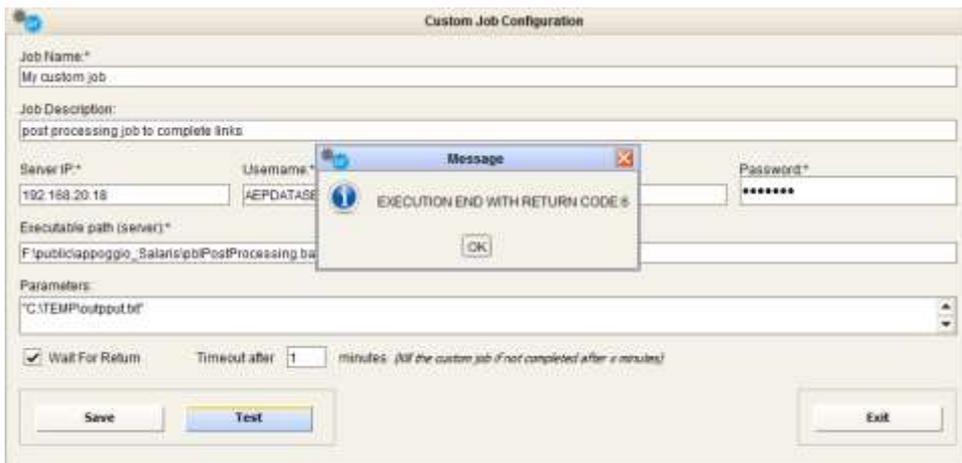
DTWhen “Wait For Return” is not checked, user may define a number of minutes that DT will wait before scheduling the next job, if the custom job is included in a job sequence.

Wait For Return      Timeout after 1 minutes (Kill the custom job if not completed after x minutes)

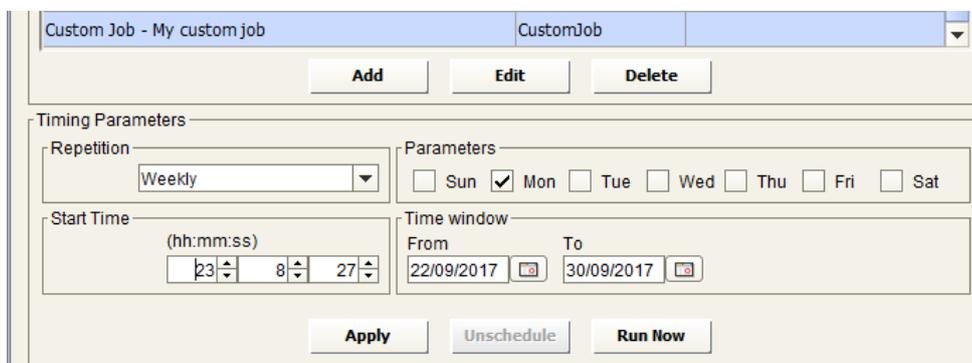
After saving the configuration, user can test the execution of the job:



In case of error, DT will provide the return code of the process execution.



You can schedule it using the standard timing parameters: the job will result in the launch of the external execution.



# Chapter 6

## 1 Running DT on Event

### 1.1 Running an Adapter on Event

In a real life environment, it could be important to acquire external data on a scheduled basis, or in an “*on event*” mode; in particular, when a DB Adapter is used for reading the information from a database. It’s quite easy to implement, for example, a stored procedure that drops a text file, containing the trigger information for DT to start a given adapter.

The trigger file can be detected by DT if dropped in a given folder:

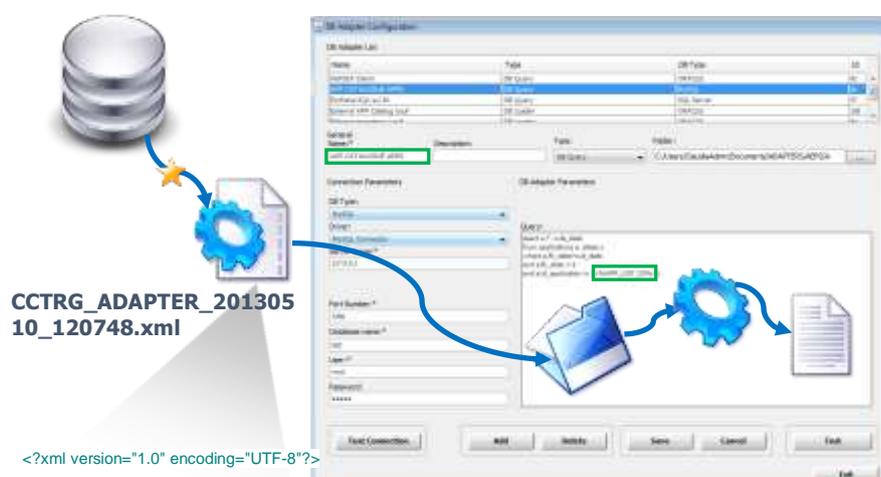
- any of the DT *adapter folders* (including the specific adapter, but not mandatory)
- the folder “*C:\ProgramData\erwin\Data Transformation\workflows*”

The described *triggering feature* applies to any other adapter type.

The trigger files must be compliant with the naming convention:

*CCTRG\_ADAPTER\_YYYYMMDD\_HHMMSS.xml*

and the sample content describing the schema is detailed below (see next paragraph for *<PARAMETERS>* tag):



```
<?xml version="1.0" encoding="UTF-8"?>
<CC_TRIGGER>
  <PARAMETERS>
    <PARAMETER name="APP_ID_LIST" value="2,5,20"/>
  </PARAMETERS>
  <ADAPTER name="APP CATALOGUE APPS">
```

---

Please note that you could even choose whether to execute all the (active) workflows defined against that adapter as source, or a sub list of your choice:

```
<?xml version="1.0" encoding="UTF-8"?>
<CC_TRIGGER>
  <PARAMETERS>
    <PARAMETER name="APP_ID_LIST" value="2,5,20"/>
  </PARAMETERS>
  <ADAPTER name="APP CATALOGUE APPS">
    <DELAY HH="0" MIN="0" SEC="30" />
    <WORKFLOWS all="false">
      <WORKFLOW name="CCWORKFLOW_1">
        <DELAY SEC="0" MIN="0" HH="0"/>
      </WORKFLOW>
    </WORKFLOWS>
  </ADAPTER>
</CC_TRIGGER>
```

### 1.1.1 Running a DB Adapter on Event with Parameters

When configuring and using a trigger file for executing a DB adapter on event, it is possible to add parameters to drive the query resultset through them.

Let's suppose that you want to configure a DB Query Adapter, which is named "MY ADAPTER" and extract detail of just the Applications that have been updated / inserted in a table named "MY\_TABLE". The Applications are selected, based on their ID.

The SQL query to do this would look like:

```
SELECT * from MY_TABLE where APPLICATION_ID in (131, 156, 653)
```

When triggering DT on event, you may want this adapter to just process applications that were updated or inserted in the DB table. The IDs of the updated / inserted Applications can be obtained and passed to the adapter using parameters in the SQL query. e.g.

```
SELECT * from MY_TABLE where APPLICATION_ID in (<%APP_ID_LIST%>)
```

---

<%APP\_ID\_LIST%> in the SQL query is the parameter name to obtain the name of the parameter in the XML trigger file.

Please note the required syntax for DT: parameter names must be provided enclosed by the prefix "<%>" and suffix "%>", like: <%PARAM\_NAME%>.

The values of the parameter must be written in the XML trigger file each time that the SQL Trigger executes on the Table where the Application detail will be updated / inserted.

The XML trigger file must contain the following:

```
<PARAMETERS>
```

```
  <PARAMETER name="APP_ID_LIST" value="345, 436"/>
```

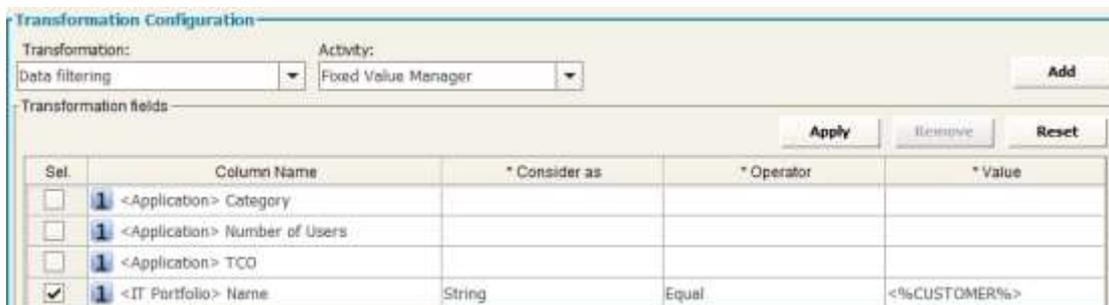
```
</PARAMETERS>
```

The parameter name is hard coded into the SQL Trigger, and the values are the IDs of the changed Applications which is written directly into the xml trigger file by the SQL Trigger. These values can be different, each time that the database trigger is executed.

When the DT Database query is executed, the values will be put in place of the parameter name, as follows:

```
SELECT * from MY_TABLE where APPLICATION_ID in (345, 436)
```

Parameters included in the trigger file can be used even in workflow transformations, when they accept fixed values, like:



Special parameters include:

**<%SYSDATE%>**: a parameter can be used to populate a fixed value column, or a filter value, with the system date and time (*UTC format*); if the value **<%SYSDATE%>** is entered, DT will replace the parameter with the datetime value, at execution time.

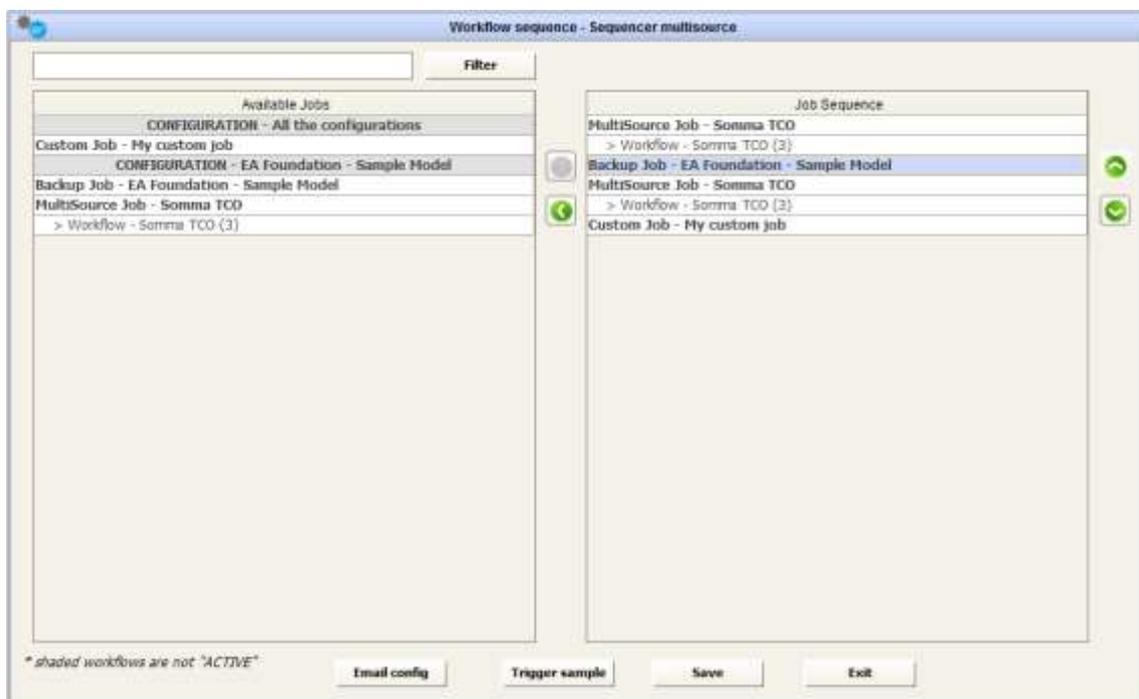


**<%BLANK%>**: in Replace Text transformation, when you want it to be applied to an empty value.

Set	Column Name	* Text to be replaced	* Replace with
<input checked="" type="checkbox"/>	<b>&lt;Application&gt; Category</b>	<b>&lt;%BLANK%&gt;</b>	<b>Critical</b>

## 1.2 Running a Sequence on event

In this version, you can define job sequences, not only on schedule time basis, but in a real logical flow; that is, the user may choose between available adapters and related workflows; which ones, and in which order they belong in the Job Sequence:



---

The job sequences can be launched on demand, on schedule, or on event in a similar way to adapters.

A sample of the needed trigger file could be obtained pushing the “Trigger sample” button:

```
<?xml version="1.0" encoding="UTF-8"?>
<CC_TRIGGER sequence="MySequenceJob">
  <PARAMETERS>
    <PARAMETER name="MY_CATEGORY_PARAM"
value="sample_value" />
  </PARAMETERS>
</CC_TRIGGER>
```

And it will contain all the parameters included in the included adapter/workflow definitions (where “*sample\_value*” must be replaced by the actual “*MY\_CATEGORY\_PARAM*” value when producing the real trigger file).

The trigger files must be compliant to the naming convention:

*CCTRG\_SEQUENCE\_YYYYMMDD\_HHMMSS.xml*

# Chapter 7

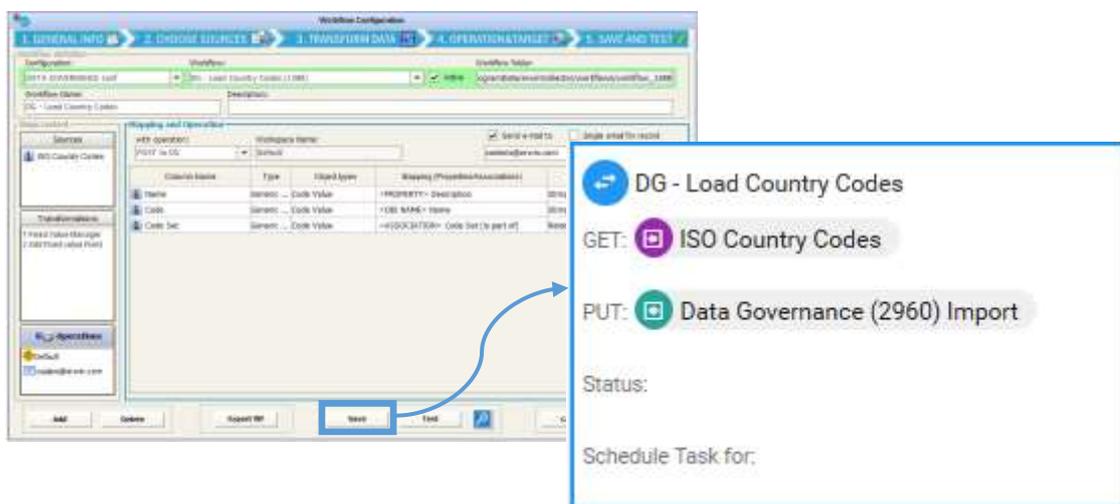
## 1 Running DT from Cloud Platform

Collector4Cloud provides EA Agile/EA Agile V3 users the capability to interact with onPrem DT:

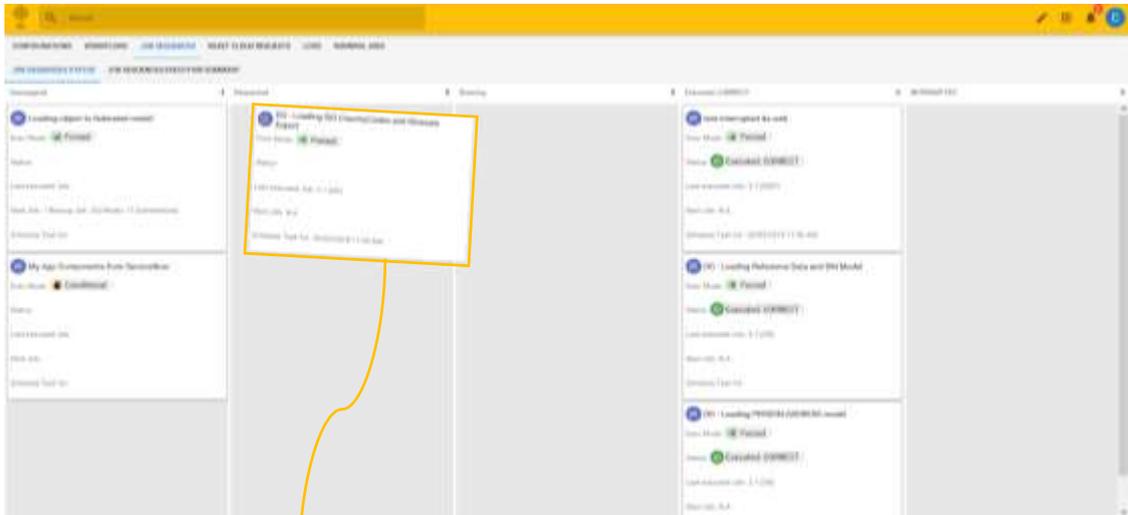
- View available **DT flows / job scheduler**
- View the **workflow definition**, in terms of sources/target Adapters and configuration
- View the **Job Sequence definition**, in terms of included workflows and custom jobs
- **Run a specific flow or job sequence on demand or by schedule**, following the execution status
- view the **data managed by the flow** to the target system / people
- **check** if the flow exited with **no data**
- **check** if there were **errors**, and view the **logs** in case
- Have a complete updated view of the **daily operations log**

Both **erwin EA Agile** and **erwin EA Agile V3** are supported, depending on the specific configuration (see [Cloud Environment](#)). This enables Listener Windows service to support on premise application to work with cloud:

- *Job (workflows and sequences) definitions* are pushed to cloud



- *Job requests* are pulled from cloud
  - *one time requests*– drag and drop to “Requested” status kanban



Name  
**DG - Loading ISO CountryCodes and Glossary Export**

---

Description  
 Upload ISO Country Codes, then export Business Glossary for Data Owner

---

Exec Mode  
 → Forced

---

Schedule Task for  
 26/03/2018 11:55 AM

---

Notify Result to  
 c.salens@yahoo.it

---

Status  
 ⌚ Requested

---

Execution Progress  
[http://localhost/Collector/Workflows/CC.JobSequence\\_1522065263365\\_20180326\\_135423.html](http://localhost/Collector/Workflows/CC.JobSequence_1522065263365_20180326_135423.html)

---

Last Execution DateTime  
 26/03/2018 01:57 PM

---

Last executed Job  
 2.1 (OK)

---

Next Job  
 N.A.

---

Workflows included  
 ⚙️ DG - Load Country Codes ⚙️ DG Glossary - Report

---

Custom Jobs included

---

Last Execution ID  
 1522065263365

---

Job Sequence ID  
 -17089281

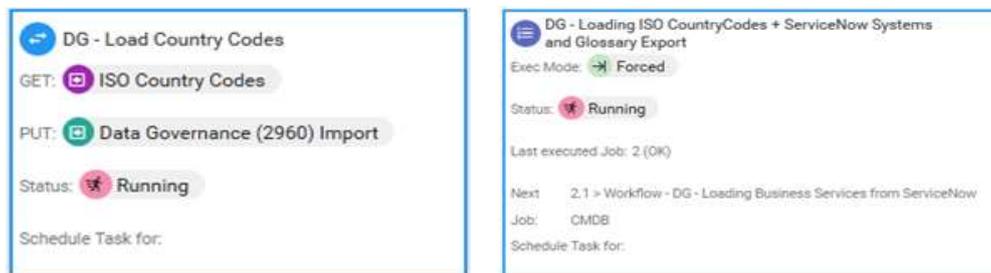
- *on schedule* – setting the datetime field “Schedule Job for”

Schedule Task for  
26/03/2018 01:28 PM



Please, note that **repetitive schedules** are only configurable by **on premise application**.

User can **monitor** the **execution of jobs** by different views and fields and linked reports:



- “*Last execution Dataset*” for workflows:

Last Execution ID  
1522071325173

Last Execution DateTime  
26/03/2018 03:37 PM

Last Execution Dataset  
<http://localhost/CollectorWorkflows/My Application Catalog.pdf>

Job Name	Job Type	Job Status	Job ID	Job Start Time	Job End Time	Job Duration	Job Priority	Job Owner	Job Group	Job Category	Job Sub-category
Full Application	Full Application	Success	1522071325173	2018-03-26 03:37:00	2018-03-26 03:37:00	00:00:00	Normal	System	Full Application	Full Application	Full Application
Full System	Full System	Success	1522071325173	2018-03-26 03:37:00	2018-03-26 03:37:00	00:00:00	Normal	System	Full System	Full System	Full System
Full System Manager	Full System Manager	Success	1522071325173	2018-03-26 03:37:00	2018-03-26 03:37:00	00:00:00	Normal	System	Full System Manager	Full System Manager	Full System Manager
Full System Application	Full System Application	Success	1522071325173	2018-03-26 03:37:00	2018-03-26 03:37:00	00:00:00	Normal	System	Full System Application	Full System Application	Full System Application
Full System Configuration	Full System Configuration	Success	1522071325173	2018-03-26 03:37:00	2018-03-26 03:37:00	00:00:00	Normal	System	Full System Configuration	Full System Configuration	Full System Configuration
Full System Data	Full System Data	Success	1522071325173	2018-03-26 03:37:00	2018-03-26 03:37:00	00:00:00	Normal	System	Full System Data	Full System Data	Full System Data
Full System Integration	Full System Integration	Success	1522071325173	2018-03-26 03:37:00	2018-03-26 03:37:00	00:00:00	Normal	System	Full System Integration	Full System Integration	Full System Integration

- “*Execution Progress*” for Job Sequences (with links to workflows dataset), continuously updated:

The top part of the image shows the Erwin configuration for a job sequence named "DG - Loading ISO CountryCodes + ServiceNow Systems and Glossary Export". The configuration includes a "Notify Result to" field with the email address "www@erwin.com".

Below the configuration are two screenshots of the "erwinCollector" logs:

Job Type	Index	Job Name	Status	Execution DateTime	Notes
SINGLE_ADAPTER	1	ISO Country Codes	Executed CORRECT	2018-04-02 17:49:02.455	
WORKFLOW	1.1	> DG - Load Country Codes	Executed CORRECT	2018-04-02 17:49:54.575	OPERATION DATA
SINGLE_ADAPTER	2	SN - get Business Services	Executed CORRECT	2018-04-02 17:50:25.448	
WORKFLOW	2.1	> DG - Loading Business Services from ServiceNow CMDB	Executed CORRECT	2018-04-02 17:51:21.29	OPERATION DATA
SINGLE_ADAPTER	3	Data Governance (2060) Export	Executed CORRECT	2018-04-02 17:51:50.978	
WORKFLOW	3.1	> DG Glossary - Report			

Job Type	Index	Job Name	Status	Execution DateTime	Notes
SINGLE_ADAPTER	1	Data Governance (2060) Export	Executed CORRECT	2018-04-02 10:27:20.423	
WORKFLOW	1.1	> BI REPORTS	Skipped	2018-04-02 10:27:22.049	JOB IS NOT ACTIVE
CUSTOM_JOB	2	EVOLVE Publication	Executed ERROR	2018-04-02 10:27:50.514	Sequence stopped
MULTI_ADAPTER	3	GETTING DATA FROM DM - REPORT			
WORKFLOW	3.1	> GETTING DATA FROM DM - REPORT			

- *Notification emails* – can be requested by cloud setting the “Notify Result to” field on workflow/job sequences

Schedule Task for

Notify Result to

**Business Glossary from erwin DG - 03/04/2018 08:28:27**

A

glossary.xlsx  
59 KB

PFA the Business Glossary.

See more information on:

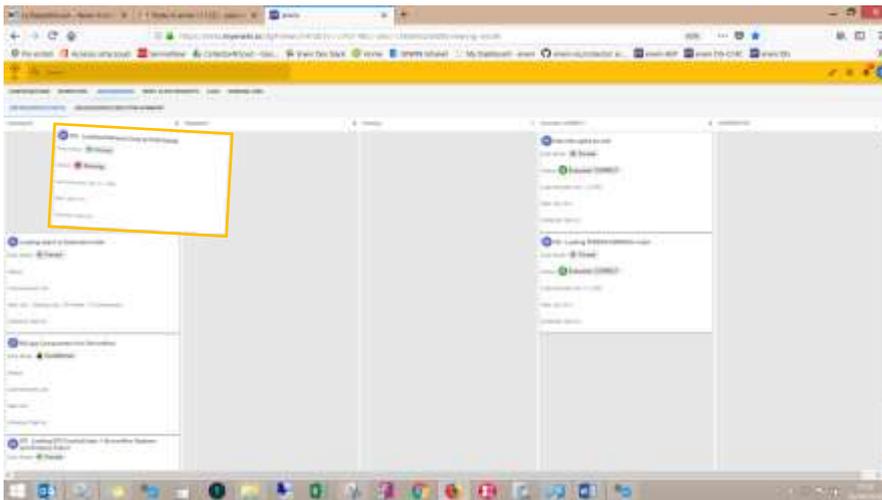
[Go to Erwin](#)



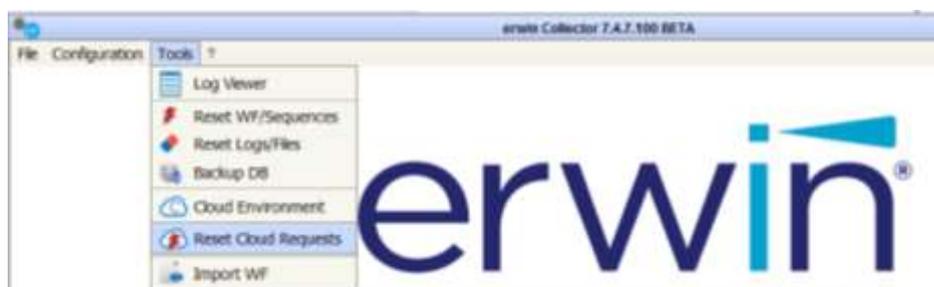
---

User can also **reset** requests:

- *one time requests* – drag and drop on “unassigned” status kanban
- *on schedule* – clearing the datetime field “Schedule Job for”, if not started; with drag and drop on “unassigned” status kanban, if running



- *all requests* can be deleted through “**RESET CLOUD REQUESTS**” job from cloud, or “**Tools→Reset Cloud Requests**” command from onprem UI.



---

# Chapter 8

## 1 Log Viewer

The log window lists all the most important actions performed by DT.

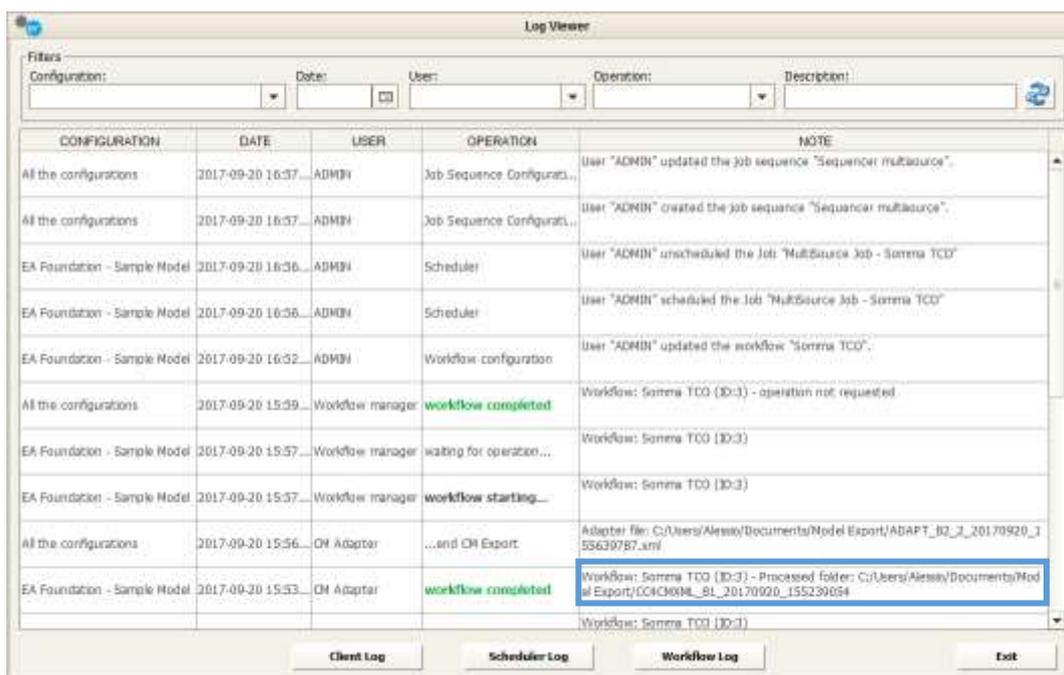
For each row, you can see the name of the configuration (column name *CONFIGURATION* – available only if linked to the action), the date (column name *DATE* – timestamp of the action), the user (column name *USER* – the user who owns the action), the operation (column name *OPERATION* – what has been done) and a short description of the action (column name *DESCRIPTION*).

*Filters* (one for each column) can be used to see a subset of the whole Log.

By pressing the  button the selected filters are applied.

Clicking on the head of each column, the rows will be ordered alphabetically.

If “Note” refers to a file or folder, double click on the note text will open it.



## 1.1 Client, Scheduler and Workflow log

The buttons open different kinds of logs showing a detailed view of the system events. Very detailed information can be found there, such as query messages, exceptions, errors etc.

The log will be shown in your predefined text editor:

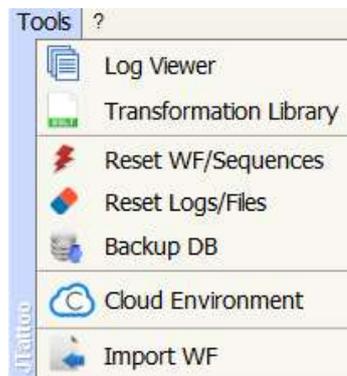
- *Client Log* refers to the operations executed through the user interface
- *Scheduler Log* refers to the batch operations related to Adapter execution
- *Workflow Log* refers to the operations required by workflow transformation and operation

---

# Chapter 9

## 1 Utilities

Additional administration features are available from the “Tools” Menu.



### 1.1 Reset Workflows/Sequences

If DT Windows Services are forced to stop, or in the case of a severe internal error, sequences may enter an inconsistent state which could stop other jobs from being executed. In such a case, the administrator may use the “Reset WF/Sequences” item in the “Tools” menu.

This operation can be done manually, as described, or by scheduling it in a custom job, using the sample execution: *resetSequencesUtil.bat* that can be found in the DT installation folder:

The screenshot shows a 'Custom Job Configuration' dialog box. The 'Job Name' field contains 'Reset Sequences Util'. The 'Job Description' field contains 'the job will reset running and pending sequences'. The 'Server IP' field contains 'ALESSIMOUBLE', the 'Username' field contains 'AlessioAdmin', and the 'Password' field contains '\*\*\*\*\*'. The 'Executable path (server)' field contains 'C:\ProgramFiles(x86)\CorporateCollector\resetSequencesUtil.bat'. The 'Parameters' field is empty. The 'Wait For Return' checkbox is checked, and the 'Timeout after' field contains '1' minutes. There are 'Save', 'Test', and 'Exit' buttons at the bottom.

## 1.2 Reset Logs/Files

When needed, it is possible to reset the logs table just by pressing the “Tools” menu item “Reset Logs/Files”.

This action will clean the database of all the application logs, thus preventing the DB from being overloaded by historical tracking data.

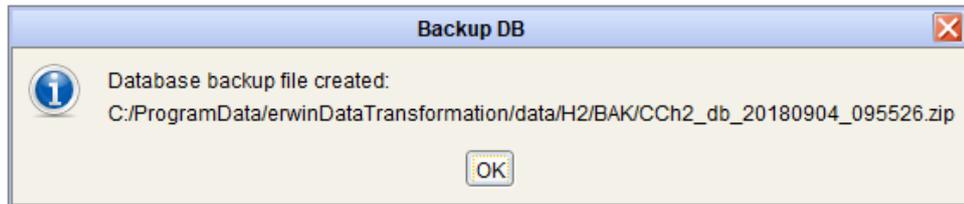
All the physical files mentioned in the deleted logs will also be deleted in the internal workflow folders; please be sure that no active workflows are running when using this feature.

This operation can be done manually, as described, or by scheduling it as a custom job, using the sample execution: *resetLogsUtil.bat* that can be found into the DT installation folder. The executable optionally accepts a numerical integer parameter, which is “days to be maintained”. For example, if called with “3”, past logs until 3 days before the job execution will be deleted.

The screenshot shows a 'Custom Job Configuration' dialog box. The 'Job Name' field contains 'Reset Logs Util'. The 'Job Description' field contains 'The job will delete temporary files and logs produced until 3 days before the job execution'. The 'Server IP' field contains 'ALESSIMOUBLE', the 'Username' field contains 'AlessioAdmin', and the 'Password' field contains '\*\*\*\*\*'. The 'Executable path (server)' field contains 'C:\ProgramFiles(x86)\CorporateCollector\resetLogsUtil.bat'. The 'Parameters' field contains '3'. The 'Wait For Return' checkbox is checked, and the 'Timeout after' field contains '1' minutes. There are 'Save', 'Test', and 'Exit' buttons at the bottom.

### 1.3 Backup DB

Regular DT database backups are recommended as a best practice. This can be obtained with “Tools→Backup DB”: it produces a zip file with a dump of CC DB into “C:\ProgramData\erwinDataTransformation\data\H2\BAK” folder, with backup datetime:

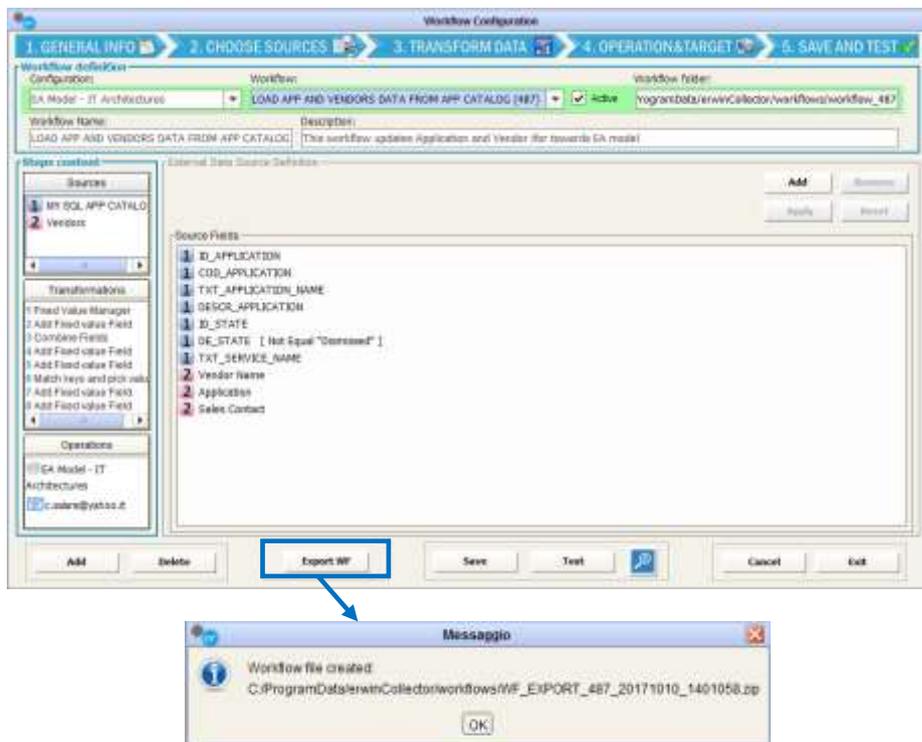


### 1.4 Export/Import Workflow

It can sometimes be necessary to configure and test workflows in a working DT instance before deploying them in a production site.

Workflows can be exported and imported in a different DT instance.

- To **Export workflows**, just open the workflow of interest, and create an archive (zip file) containing the workflow and its adapters/activity information:



- To **Import workflows**, use the “Tools”→”Import WF” - or the button “Import” in the workflow configuration interface, after selecting a model configuration - and browse to the exported zip file previously created (or drag the file to the text field):

The screenshot shows a dialog box titled "Workflow Import Management". It contains the following fields and controls:

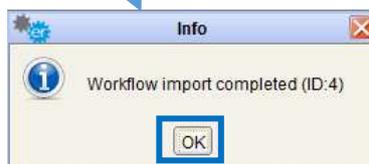
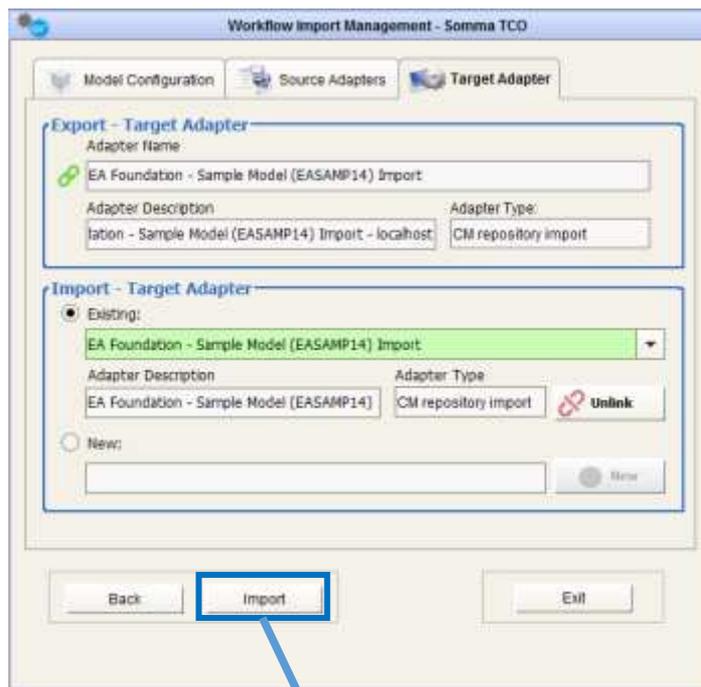
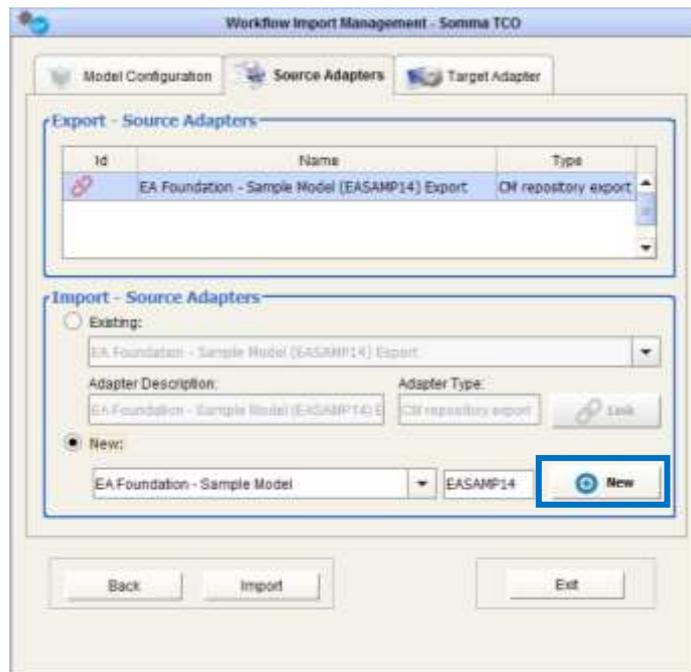
- Import file:** A text field containing the path "C:\ProgramData\erwinCollector\workflows\WF\_EXPORT\_487\_20171010\_1401058.zip" and a browse button "...".
- Workflow name:** A dropdown menu with the selected value "LOAD APP AND VENDORS DATA FROM APP CATALOG".
- Workflow description:** A text area containing the text "This workflow updates Application and Vendor ifor towards EA model".
- Buttons:** "Exit" and "Next" buttons are located at the bottom center.

Then map the **model configuration**, **source(s) adapter(s)**, and **target adapter**. In every step, should the needed configuration or adapter not exist in the target DT instance, **it can be contextually created**, allowing for smart import operations:

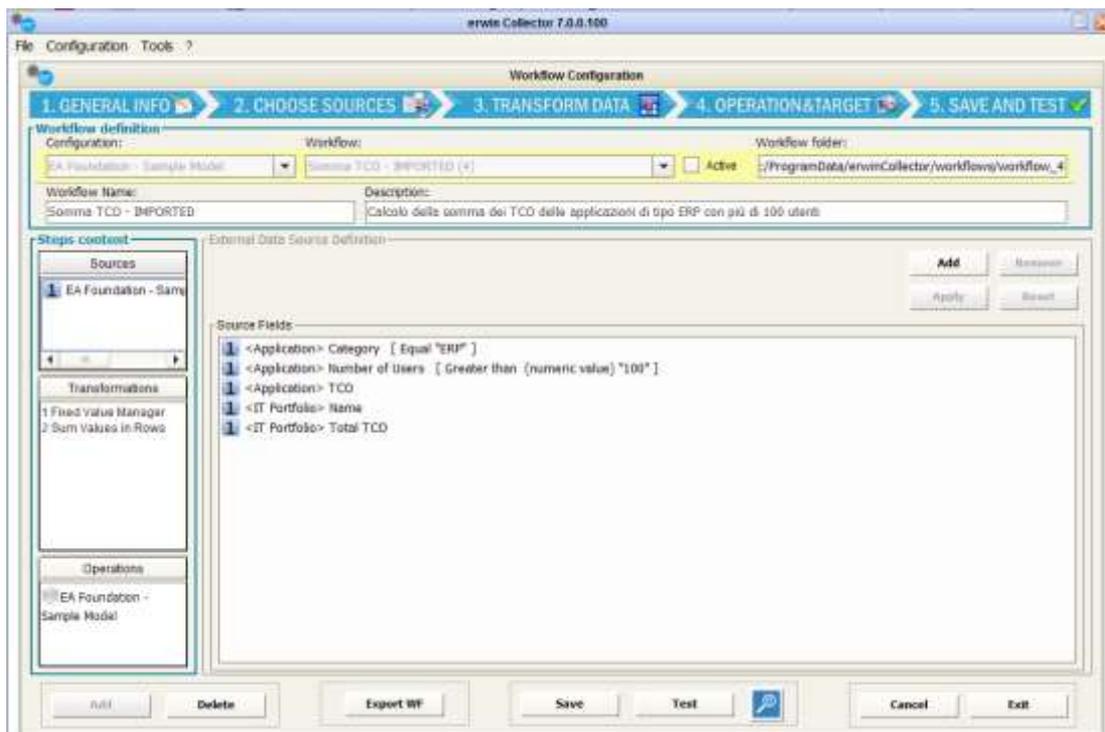
The screenshot shows a dialog box titled "Workflow Import Management - Somma TCO". It has three tabs: "Model Configuration", "Source Adapters", and "Target Adapter". The "Model Configuration" tab is active and contains two sections:

- Export - Model Configuration:** Contains fields for "Model Name" (EA Foundation - Sample Model) and "Model ScriptName" (EASAMP14).
- Import - Model Configuration:** Contains radio buttons for "Existing:" and "New:". Under "Existing:", there is a dropdown menu with "EA Foundation - Sample Model" selected, and fields for "Model Name" (EA Foundation - Sample Model) and "ScriptName" (EASAMP14) with an "Unlink" button. Under "New:", there is a dropdown menu with "<select a model>", an empty text field, and a "New" button.

At the bottom, there are "Back", "Import", and "Exit" buttons.

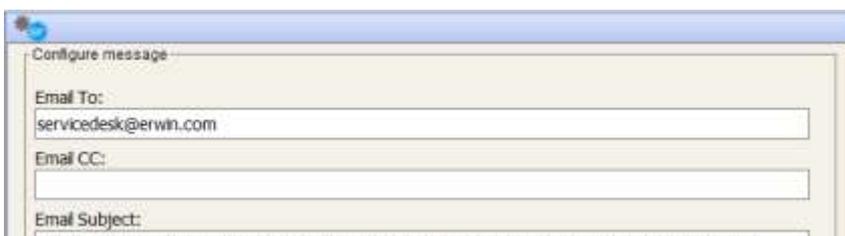
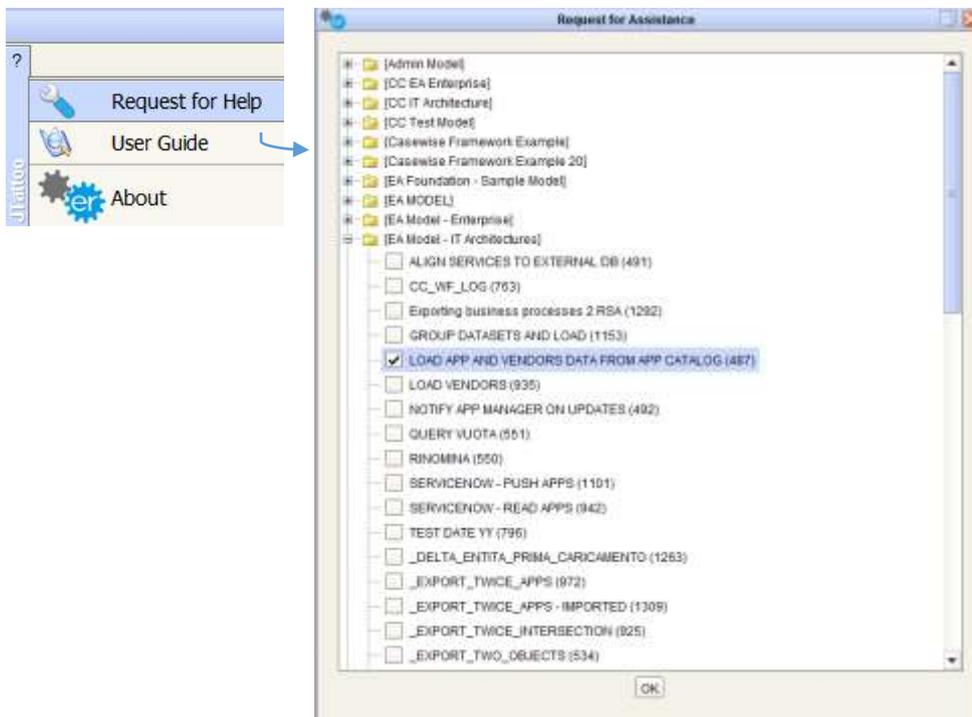


The result of the import operation is then shown to the user, which can edit/test/schedule workflow as usual:



## 1.5 Request for Help

Users can ask for assistance for workflows through a dedicated features in main toolbar:



---

A message with a workflow definition and log file attached (more files can be added) will be prepared to be sent to ServiceDesk if DT email parameters have been provided during tool configuration.

## 1.6 Cloud Environment

Use this menu item to configure Cloud Environment parameters, to connect DT to erwin Cloud platform ([see Running DT from Cloud Platform](#))

The screenshot shows a dialog box titled "Configure Cloud Environment" with the following fields and controls:

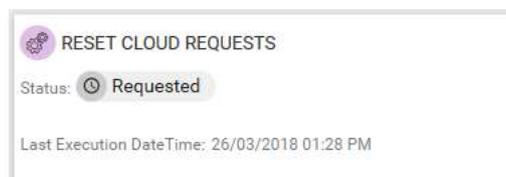
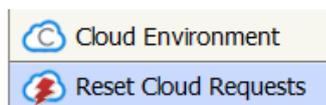
- Environment: erwin Data Governance (dropdown)
- URL: https://myerwin.io (dropdown)
- Username: csalaris (text input)
- Password: masked with dots (password input) with a "Test" button
- Workspace: Default (dropdown)
- WS Id: 2121 (text input) with a checked "Active" checkbox
- Folder: F:\CollectorExtEvents (text input) with a "..." browse button
- Output URL: http://localhost/CollectorWorkflows (text input) with a "..." browse button
- Buttons: "Browse", "Save", and "Exit" at the bottom.

- 
1. Select environment parameters – erwin EA Agile or erwin EA Agile V3 – and instance
  2. Provide credentials for the selected instance
  3. Test the connection
  4. Select workspace containing the DT package (see before)
  5. Set the communications to be active or not. In last case, DT will not take charge of requests from cloud. This may be applied as a temporary setting for upgrade/maintenance purposes etc.
  6. Select a physical folder. This will be used as a publishing folder for web reports (HTML, pdf, csv, Excel), like web logs, workflows operation data, sequence progress reports. It has to be:
    - a. Readable/writable by Windows user running Windows services and the DT UI on premise
    - b. Published in LAN or public web, making DT reports visible and accessible by web.
  7. Save
  8. Restart Windows service “erwinDataTransformationEventManager”
  9. Reset WF/Sequences from Tools menu item.

### 1.7 Reset Cloud Requests

Use this menu item to reset requests sent by erwin Cloud platform ([see Running DT from Cloud Platform](#)).

If DT Windows Services are forced to stop, or in the case of a severe internal error, sequences may enter an inconsistent state which could stop other jobs from being executed. In such a case, the administrator may use the “Reset Cloud Requests” item in the “Tools” menu, or request for “RESET CLOUD REQUESTS” job by cloud.



---

# Chapter 10

## 1 Users, Roles and Security

DT interacts with CM contents – models, objects and so on – through the same logic and application components that Corporate Modeler and Evolve rely on.

**Normal authentication is the only fully supported option.**

**Windows Authentication is not supported** in DT, as it is not suitable for batch job execution.

General rules about security, authentication and authorization are:

- *Users' logon* is performed using their CM userid/password, provided that a valid DT license has been installed.
- Once logged on, users can define *model configurations*, and associated *workflows*, only for *models* which have been granted through Corporate Modeler Administration.
- When a user defines a model configuration, *users' credentials of related CM Adapters* (created automatically for data export/import on that model) are encrypted and stored in the CC internal database. This is needed in order to be available when workflows using those adapters are executed in a batch mode (which "Test workflow" simulates).

This means that CM Users actually executing the operation are the person that configured and saved the associated model configuration. *If the user has to be changed*, the new user must log on to DT, and save the configuration, in order to bind their CM credentials to it; the workflows will be automatically updated.

- *Read/write/delete operations* on object type instances will be executed within the same user's rights scope existing in model. This means that they are impacted by general and specific grants on model and object type, by the status of the object (for

---

instance, Frozen level) and property type configuration (Read Only properties will be not updated).

When requested, these operations will be executed, if possible, or a log will be produced, containing details about what prevented the operation to be finalized.

---

# Chapter 11

## 1 Troubleshooting Information

DT creates and uses some specific paths/folder during the execution of client configurations or scheduled operations. Main folders and files are explained in the following paragraphs.

### 1.1 Installation Path

The **installation path** is by default:

*C:\Program Files (x86)\erwin\Data Transformation*

#### Contents:

- *Configuration files:*
  - *<inst\_path>\config\erwinDataTransformation.properties*
  - *<inst\_path>\config\quartz.properties*
  - *<inst\_path>\config\workflows\config\jdbc\CollectorDS.properties*  
containing the DT database connection string
- *Binaries*
- *External libraries*
- *CM4Collector.exe*  
performs import/export CM models operations

### 1.2 Data Path

The **data path** is by default:

*C:\ProgramData\erwin\Data Transformation*

---

### Subfolders:

- *data*  
DT database files
- *libraries*  
XSLT parsers used for library/custom transformations
- *log*  
Client.log, event.log, server.log, listener.log
- *workflows*  
Workflows operation data, workflow testing triggers

The data path can be different from the default; configure the tool providing the desired path:

The image shows a screenshot of the 'erwinCollector Configuration Parameters' dialog box. The title bar reads 'erwinCollector Configuration Parameters'. The main area features the 'erwin COLLECTOR' logo. Below the logo are three tabs: 'General', 'Database', and 'Email'. The 'Database' tab is selected. The configuration options include:

- Select Language:** A dropdown menu set to 'English'.
- Select JDK version:** A dropdown menu set to '1.7.0\_79 (64bit)'.
- Credential for Windows services creation:**
  - User:** A text field containing 'CLAUDIAMOBILE\ClaudiaAdmin'.
  - Password:** An empty text field.
  - Attention: for service creation user with password is mandatory.*
- Select Data Folder:** A text field containing 'C:/ProgramData/erwinCollector' and a 'Browse...' button. This section is highlighted with a blue border.

---

### 1.3 Setup / Windows Services

DT installs four Windows Services, which have to be launched by a Windows user belonging to the Administrator group:

- *erwinDataTransformationH2DB*:  
Runs the application database
- *erwinDataTransformationListenerManager*  
Detects newly created files into DT folders (see later)
- *erwinDataTransformationEventManager*  
Manage the event queue, as workflows to be run for adapter files detected by Listener manager
- *erwinDataTransformationServerManager*  
Performs scheduled jobs (adapters or sequences execution)

### 1.4 Adapter Folders

When configuring an adapter, DT requires to assign a folder.

This will contain:

- A file, created when saving the adapter, which is used to inherit the information about the structure of datasets coming from the adapter, named:

*ADAPT\_<adapt\_id>\_struct.<adapt\_ext>*

For instance, ADAPT\_79\_struct.csv will be produced when saving a DB adapter with internal id equal 79, containing the resultset columns and a sample of data.

- The following adapter files coming from its execution, that will be named as:

*ADAPT\_<adapt\_id>\_<operation\_timestamp>.<adapt\_ext>*

### 1.5 Model Configuration Folder

When setting up a model configuration, DT requires assignment of a folder for the backup. This will be used also as *adapter folder* for the automatically created CM import-export adapter.

This will contain:

- 
- The backup of the model, when required by scheduling:  
*<model scriptname>\_<operation\_timestamp>.mdb*
  - The structure file for export adapter, containing the metamodel:  
*ADAPT\_<adapt\_id>.xml*
  - The CM export adapter files, when requested:  
*ADAPT\_<adapt\_id >\_<operation\_timestamp>.xml*
  - Operation folders for the given model (see later)

## 1.6 Workflow Folder

When configuring a workflow, DT will automatically create a subfolder in the <datafolder>/workflows, assigned for the specific workflow, named:

*workflow\_<wf\_id>*

This will contain:

- the source adapter normalized file
- the multisource folder when using more than a source
- Support file containing trigger and parameter information
- the xslt dynamically created to perform requested transformation
- the intermediate and final result of the transformation chain

## 1.7 Operation Folder

When configuring a workflow operation, this will be in charge of an adapter (*CM Import, DB Loader, Folder*).

The workflow manager, at the end of the transformation chain, prepares the files which allow it to perform the requested operation, and puts them into a subfolder of the adapter folder.

In particular, for:

- *Load/Synch/Delete CM Repository*  
The subfolder will be created into target model folder
- *Send to DB Loader*  
The subfolder will be created into adapter folder
- *Send to File Adapter*

---

The subfolder will be created in the target folder

# Chapter 12

## 1 Examples of Workflow Configurations

### 1.1 Loading data from external sources into a model

This example describes the following use case: application and vendor data stored in different external tools must be loaded consistently in a CE repository.

Let us suppose that:

- a **CMDB** manages the **application data**, stored in a **MySQL database table**. The application table identifies the item with a “COD\_APPLICATION” field, which has a different erwin ID for the model for the same item:



ID_APPLICATION	FK_SERVICE	COD_APPLICATION	TXT_APPLICATION_NAME	FK_STATE	MAIN_TECHNOLOGY	DESCR_APPLICATION
1	2	4L99	IP Phone System	6	Java	The primary objective for the site is the discor
2	3	6F33	Fleet Management	9	Java	
3	4	7B72	SAP Financials	6	COBOL	Gaucherpartners.com is a non-branded wet
4	5	10A23	Order to Cash	6	NET	Prova prova def aprostrato
5	6	8W32	Stock Control System	6	DB2	(null)
6	13	2K51	Order Processing System	6	AS400	(null)
7	20	10T43	Customer Care System	6	NET	The Customer Care application
8	26	3H85	Mailing List	6	Java	http://evolve.pfizer.com/pfcentabica/blueprin
9	27	5A65	Project Management System	3	Java	(null)
10	28	6C50	EA Repository	6	DB2	(null)
11	29	10C89	Who's Who	6	NET	It is in-house implementation of the signpath

- **Vendor data** for any application are provided by another APM tool, via an **Excel** report. The file relates the Vendor and the Sales Contact with an Application through its CMDB code:



	A	B	C	D
1	Vendor name	Vendors Sales Manager	ApplicationID	Role
2	Alfa S.p.a	Mark	K65	AM
3	Beta S.r.l.	Lewis	V32	PM
	Ita	Carl	L43	AM/DM
	mma	Antonio	A30	AM

A DT workflow importing and refreshing application and vendor data can be configured with the following steps:

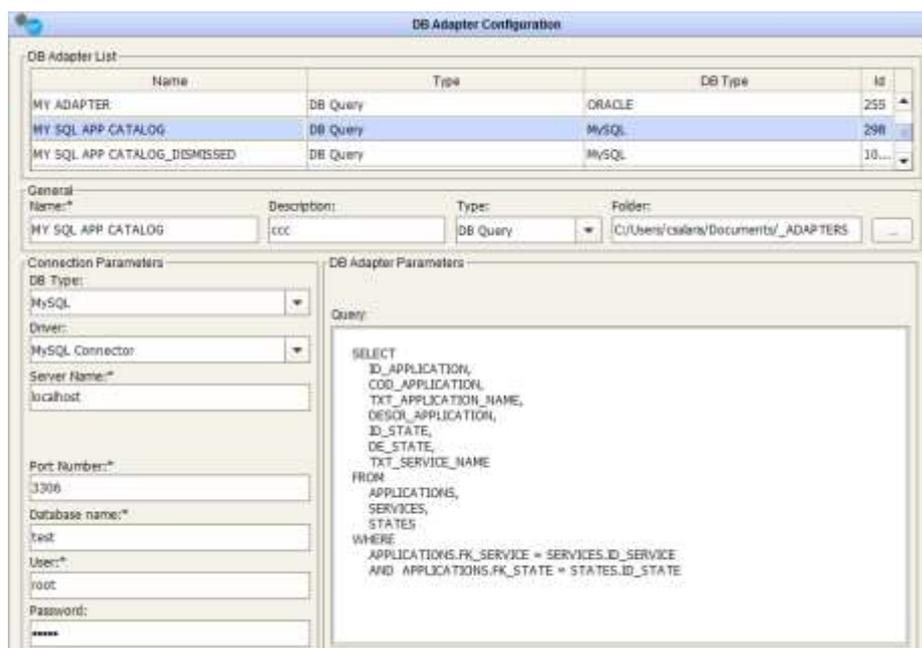


- CREATE MODEL CONFIGURATION

Log in to DT and create a model configuration, for instance on model “Framework Example”. To load data into a model choose the specific model configuration.

- CREATE DATABASE ADAPTER FOR SAMPLE APPLICATION CATALOG DB

Press the “DB Adapter” button on the Home Page and configure the following adapter:



having the database type equal to “MySQL”, server, port, database name, user, password and query producing the desired data (preview with the “Test” button):

Adapter Preview  
MY SQL APP CATALOG

ID_APPLICATION	COD_APPLICATION	TXT_APPLICATION_N...	DESCR_APPLICATION	ID_STATE	DE_STATE	TXT_SERVICE_NAME
26	H65	Mailing List	index_definitions_employment	6	Production	Mailing List (T66)
2	L99	IP Phone System	The primary objective for b...	6	Production	VOIP svc (H65)
3	F33	Fleet Management		9	Demoad	Repository (B31)
4	B72	SAP Financials	It is based on the standard ...	6	Production	SAP SVC (L31)
5	A23	Order to Cash	The new version's significa...	6	Production	Sales and Customer Servic...
6	W32	Stock Control System		6	Production	Workflow-Logistic (C12)
17	A44	Project Management System		3	Test	PRM servca (P09)
28	C59	SA Repository		6	Production	Repository (B31)
13	K31	Order Processing System		8	To be demoad	ERP Service order processi...
20	T43	Customer Care System	The Customer Care applicat...	6	Production	Sales and Customer Servic...
25	C99	Who's Who	Assesses whether a given g...	6	Production	Sales and Customer Servic...

- CREATE FILE ADAPTER FOR VENDORS INFORMATIONS FILE

Press the “File Adapter” button on the Home Page and configure the following adapter:

**File Adapter**

Name	Description	Id
ADAPTER CSV FROM ARCHER	---	333
AFD	---	293
App Vendors	---	373
CAP ONE - 1002-Requirement_Coverage_Detail	sf	682
CAP1 - Requirement Details	---	78

**General**

\* Name:

\* Description:

\* Adapter Folder:  ...

\* Operation:  ▼

**Connection**

\* Host IP:

\* Port:

\* UserName:

\* Password:

**\* Operation Parameters**

\* Protocol:  ▼

\* Type:  ▼

\* Target Directory:  ...

\* File/Filters:  ...

**Proxy**

Use Proxy Socks

Host IP:

Port:

UserName:

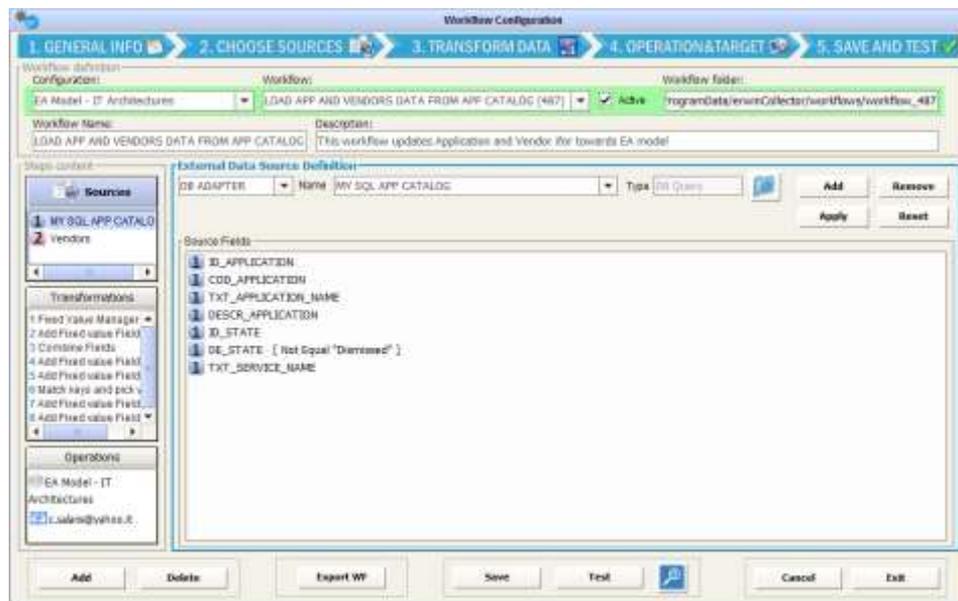
Password:

- CREATE WORKFLOW TO LOAD APPLICATIONS AND VENDOR DATA

Press the “Workflow configuration” button on the Home Page and configure the following workflow choosing the model configuration set in the previous steps:

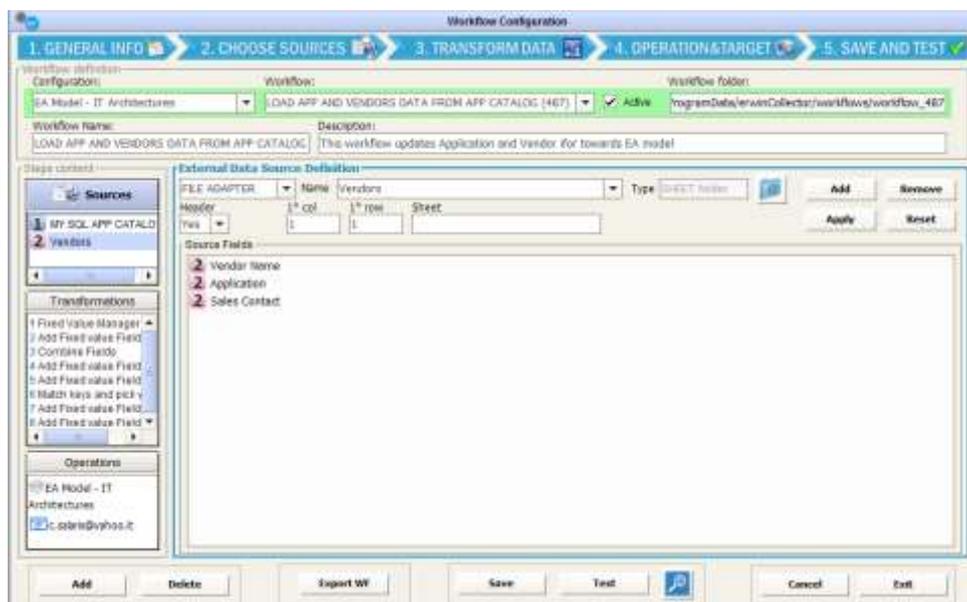
### **SOURCE DEFINITION – Source 1**

Choose previously configured DB adapter on MYSQL:

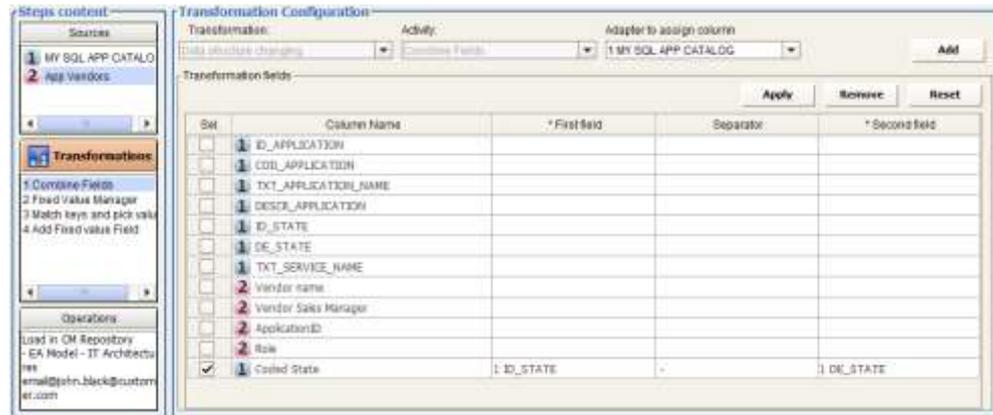


### **SOURCE DEFINITION – Source 2**

Choose previously configured file adapter for vendor info:



Let us suppose that “Status” field in CM model is coded, combining the status id with the status description (for example “6 - Production”). Combine the application status code and application status description (columns “1 ID\_STATE” and “1 DE\_STATE”) in a new column named “1 Coded state” with a given separator according to target model conventions:



### **TRANSFORMATION 2 – Filter Status Values**

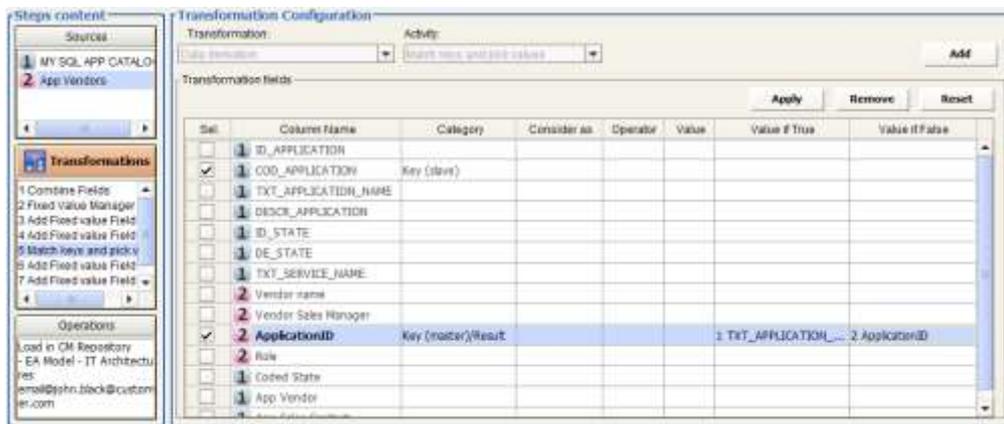
CM model manages only active applications: choose “DATA FILTER”, “Expected fixed Value Manager” to manage only application with a status different from “Dismissed”:



**TRANSFORMATION 3 – Pick the application name from the App catalogue dataset, given its id**

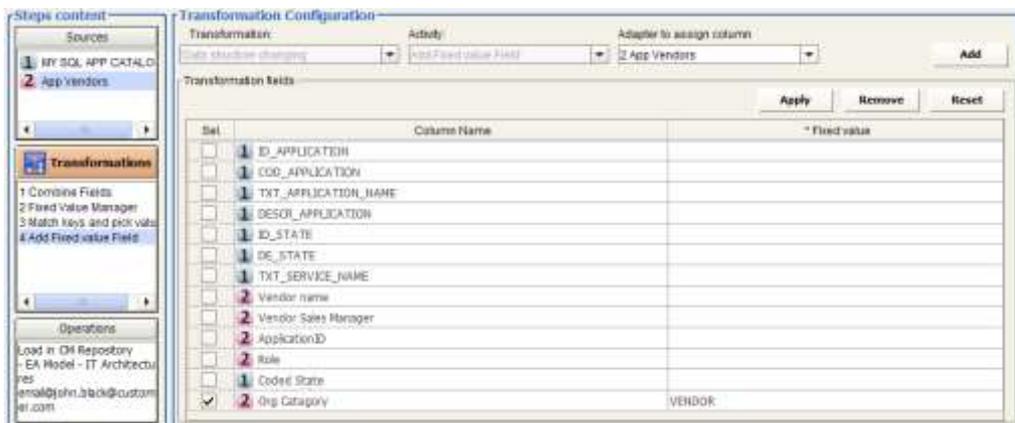
The “Data derivation” activity “Match keys and pick values” applies if it is required to join values from different data sets and have a different result column value if the keys are matched or not. For the purposes of this exercise:

- Set the ‘Category’ field to “Key (slave)” for “COD\_APPLICATION” and “Key (master/result)” for “ApplicationID” in the Vendor dataset: pick “TXT\_APPLICATION\_NAME” column from app catalogue dataset to get the application name, when the keys match (“Value If True”) and the column itself, otherwise (“Value If False”).



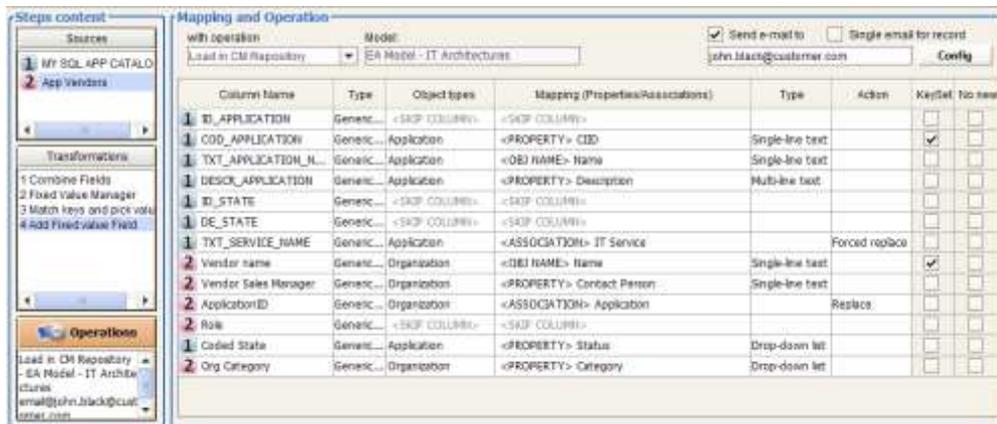
**TRANSFORMATION 4 – Set Vendor Category.**

Choose “DATA STRUCTURE CHANGING” and “Add fixed value Field”, with name “Vendor Category” and value “VENDOR” and assign to Adapter “2 App Vendors”:



## OPERATION – Load in CM Repository

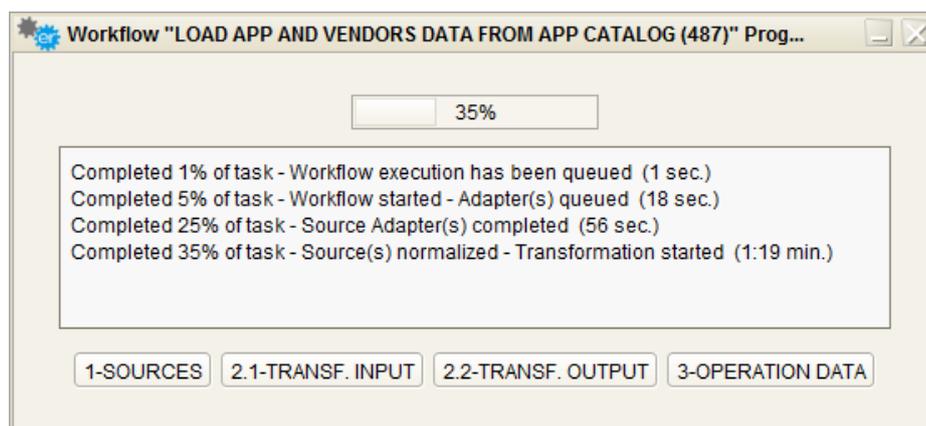
Load application and vendor data in to model, as in the next picture.



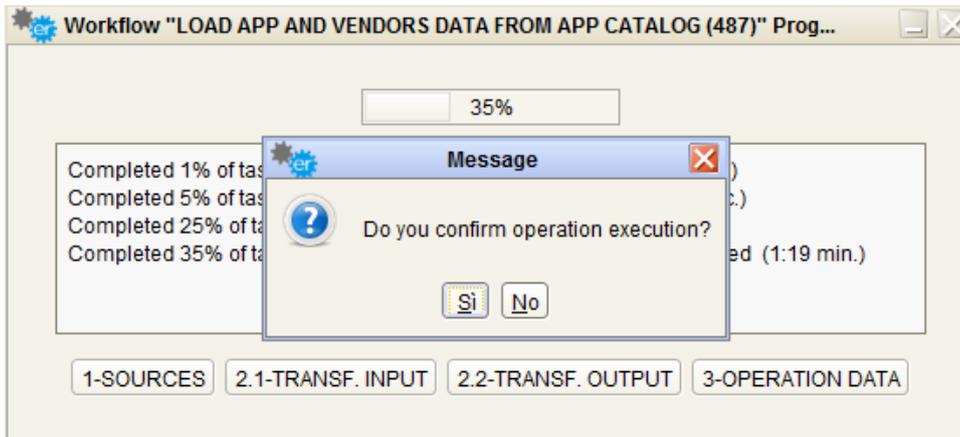
Note that the keyset for operation is set to “<Property> CIID” to manage the renaming of applications. The “Forced replace” option under ‘Action’ for “TXT\_SERVICE\_NAME” will make the association between “applications” and “IT services” be replaced even when associations are diagrammed.

- TEST THE WORKFLOW

Test the configured workflow with the “Test” button, and follow its execution through the progress bar or Logs and email notifications.



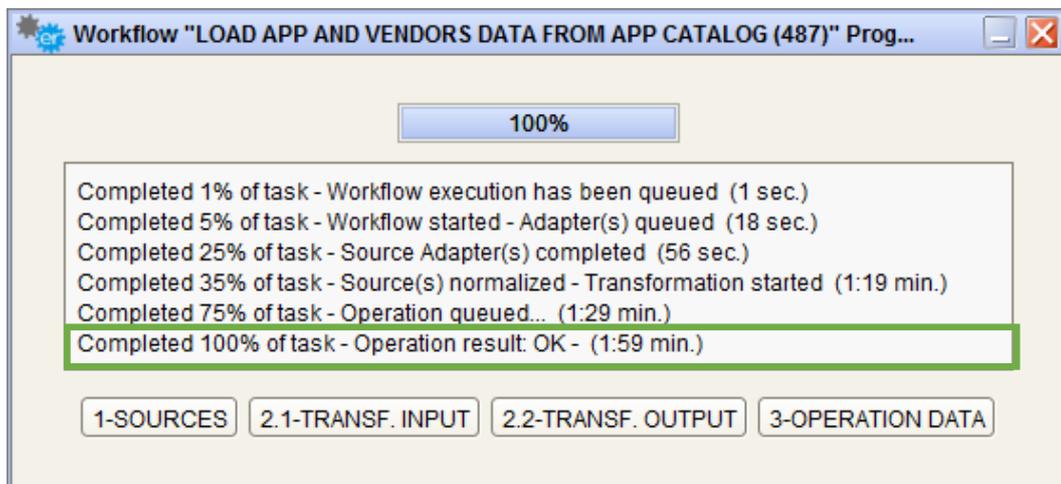
At the end of workflow transformation if operation data is available and ready, the user may choose whether to execute the operation or not:



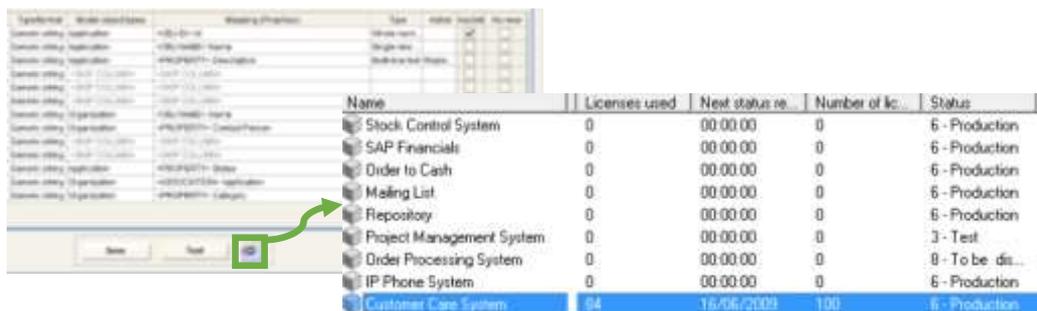
- CHECK RESULT

Moreover, you can check the result:

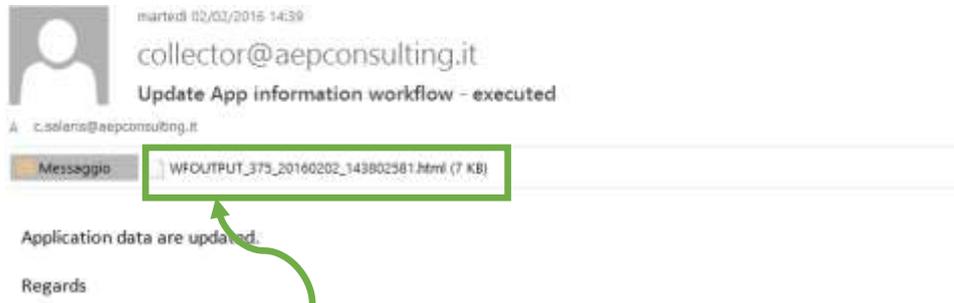
- from the test workflow **progress bar**:



- in **CM**, accessing the tool through the CM icon provided in the button bar.



- with the **email notification**, if configured for the single workflow:



ID_APPLICATION	TIT_APPLICATION_NAME	DESCR_APPLICATION	ID_STATE	DE_STATE	TIT_SERVICE_NAME	Coded State
26	Mailing List		6	Production	Mailing List (T66)	6 - Production
2	IP Phone System		6	Production	VOIP svc (H83)	6 - Production
4	SAP Financials		6	Production	SAP SVC (L13)	6 - Production
5	Order to Cash		6	Production	Sales and Customer Services (Q81)	6 - Production
6	Stock Control System		6	Production	Workflow-logistic (C12)	6 - Production
27	Project Management System		3	Test	PPW service (P09)	3 - Test
28	Repository		6	Production	Repository (R11)	6 - Production
13	Order Processing System		8	To be dismantled	ERP Service order processing (F43)	8 - To be dismantled
28	Customer Care System	The Customer Care application	6	Production	Sales and Customer Services (Q81)	6 - Production

Vendor name	Vendor Sales Manager	ApplicationID	Role	Application Name	Vendor Category
Alfa S.p.a	John Black	13	AM	Order Processing System	VENDOR
Beta S.r.l.	Mark Brown	5	Vendor	Order to Cash	VENDOR
Delta	Lisa White	4	AM	SAP Financials	VENDOR
Gamma	Blck Jones	2	AM	IP Phone System	VENDOR
Gamma	Rick Jones	13	VENDOR	Order Processing System	VENDOR

- from the **DT Log Viewer**:

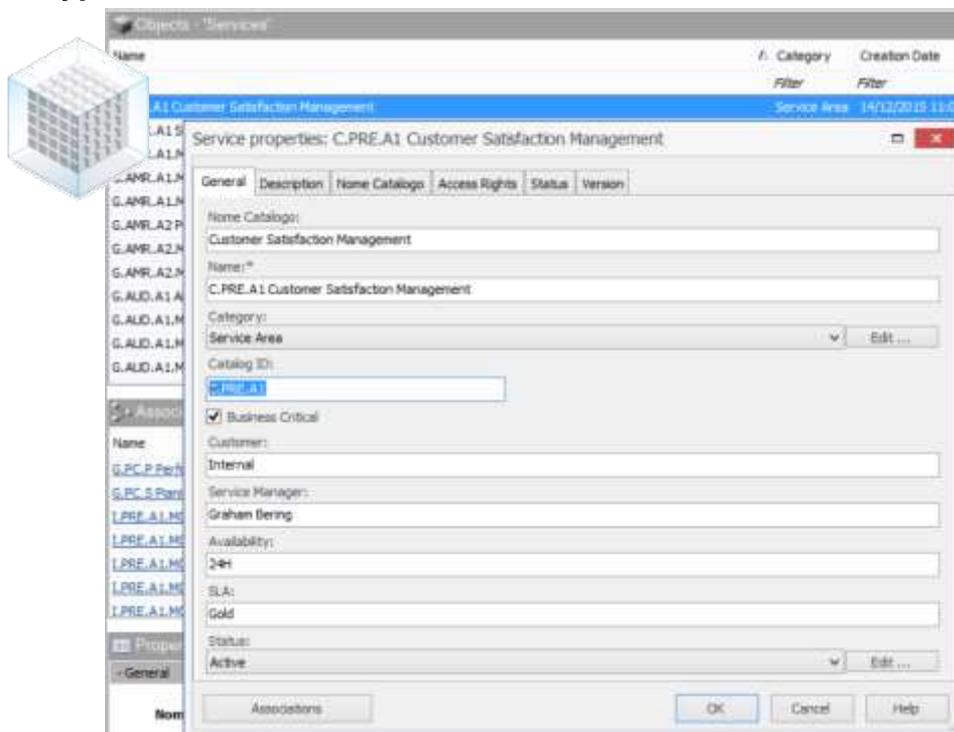
CONFIGURATION	DATE	USER	OPERATION	NOTE
EA Model - IT Architecture	2017-09-30 13:35	CR Adapter	workflow completed	Workflow: LOAD APP AND VENDORS DATA FROM APP CATALOG (ID:487) - Processed Folder: C:\Users\calaris\Documents\CC_ITARCH\CC4CM004_375_20170930_133136283
EA Model - IT Architecture	2017-09-30 13:31	Workflow manager	waiting for operation...	Workflow: LOAD APP AND VENDORS DATA FROM APP CATALOG (ID:487)
EA Model - IT Architecture	2017-09-30 13:31	Workflow manager	workflow starting...	Workflow: LOAD APP AND VENDORS DATA FROM APP CATALOG (ID:487)
All the configurations	2017-09-30 13:30	File Adapter	file(s) transferred	Adapter file: C:\ProgramData\erwinCollector\workflows\workflow_487\MULTISOURC E_487_20179930_1330030\ADAPT_299_2_20170930_133030645.xml
All the configurations	2017-09-30 13:30	DB Query	...end DB Export	Adapter file: C:\ProgramData\erwinCollector\workflows\workflow_487\MULTISOURC E_487_20179930_1330030\ADAPT_298_1_20170930_133030515.csv

## 1.2 Align External DB with Model Contents

The example describes the following use case: business service data, managed natively into a CE repository, must be loaded consistently in a MS SQL database, hosting a third party Service Catalogue.

Let us suppose that:

- **Business service data** are into the **CM model**, in a dedicated **object type**



- a **Service Catalogue** manages **enterprise services data**, stored in a MS SQL **database table**. The service table identifies the item with a “COD\_APPLICATION” field, which is differentiated by the Erwin ID of the model for the same item:



ENC_ID	NAME	DESCRIPTION	CATEGORY	SLA	BN_CRITICAL	STATUS	OP_DATE	CC_OP_DATE
C.PRE.A1	Previsioni vendite		Service Area	Gold	1	Active	2016-10-08 09:31:53	2016-10-06 10:13:16
G.ANR.A1	Sonesta		Service Area	Platinum	1	Active	2016-01-27 10:25:30	2016-10-06 10:13:16
G.ANR.A1.M01	Circolanza statistica situazione		MacroService	Silver	C	Active	2015-12-14 10:36:49	2016-10-06 10:13:16
G.ANR.A1.M01.001	Raccolta dati statistici esterni all'azienda	Acquisizione dei dati e def.	Service	Gold	1	Active	2015-12-14 10:36:49	2016-10-06 10:13:16
G.ANR.A1.M01.002	Elaborazione e analisi statistiche situazione	Studi, analisi ed elaborazi.	Service	Gold	1	Active	2015-12-14 10:36:49	2016-10-06 10:13:16
G.ANR.A2	Fattiche di indirizzo		Service Area	Silver	1	Active	2015-12-14 10:36:49	2016-10-06 10:13:16
G.ANR.A2.M01	Fattiche di indirizzo		MacroService	Gold	1	Active	2015-12-14 10:36:48	2016-10-06 10:13:16
G.ANR.A2.M01.001	Fattiche, linee guida e rubriche in materia di...	Partecipazione di politiche...	Service	Gold	1	Active	2015-12-14 10:36:50	2016-10-06 10:13:16
G.AUD.A1	Audi strategico		Service Area	Platinum	1	Active	2015-12-14 10:36:50	2016-10-06 10:13:16
G.AUD.A1.M01	Audi strategico		MacroService	Platinum	1	Active	2015-12-14 10:36:50	2016-10-06 10:13:16
G.AUD.A1.M01.001	Audi su processi di business per regolamenti...	Controllo metodologico su...	Service	Gold	1	Active	2015-12-14 10:36:50	2016-10-06 10:13:16
G.AUD.A1.M01.002	Data quality e Data governance	Controllo dei processi di De...	Service	Gold	1	Active	2015-12-14 10:36:50	2016-10-06 10:13:16
G.AUD.A2	Governance Rischi		Service Area	Gold	1	Active	2015-12-14 10:36:50	2016-10-06 10:13:16
G.AUD.A2.M01	Governance Rischi		MacroService	Silver	C	Active	2015-12-14 10:36:50	2016-10-06 10:13:16
G.AUD.A2.M01.001	Gestione Rischi	Verifica della regolarità dell...	Service	Gold	1	Active	2015-12-14 10:36:50	2016-10-06 10:13:16
G.AUD.A2.M01.002	Analisi	Valutazione dei rischi e de...	Service	Gold	1	Active	2016-01-28 16:17:38	2016-10-06 10:13:16

A DT workflow aligning Business Services data from Erwin to the Service Catalogue database can be configured with the following steps:

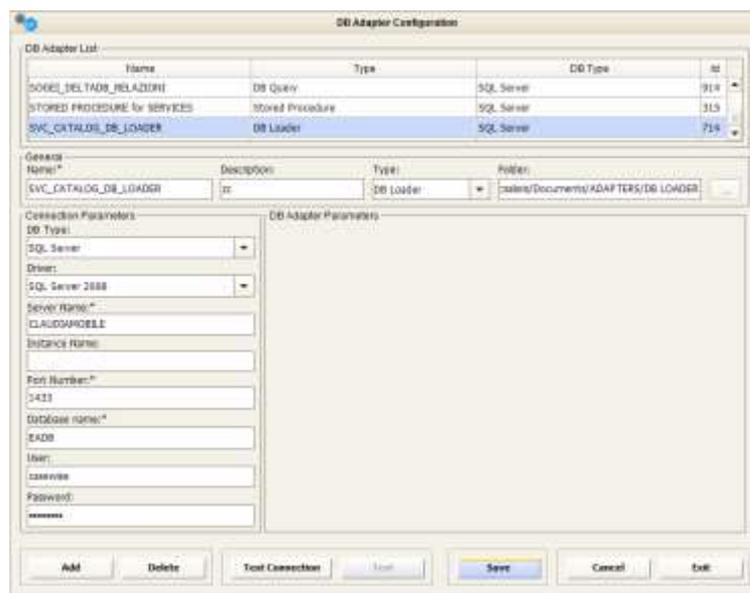


- CREATE MODEL CONFIGURATION

Log in to DT and create a model configuration for the model involved in the use case

- CREATE DATABASE ADAPTER TO LOAD SERVICE CATALOG DB

Press “DB Adapter” button in Home Page and configure the DB Loader Adapter:



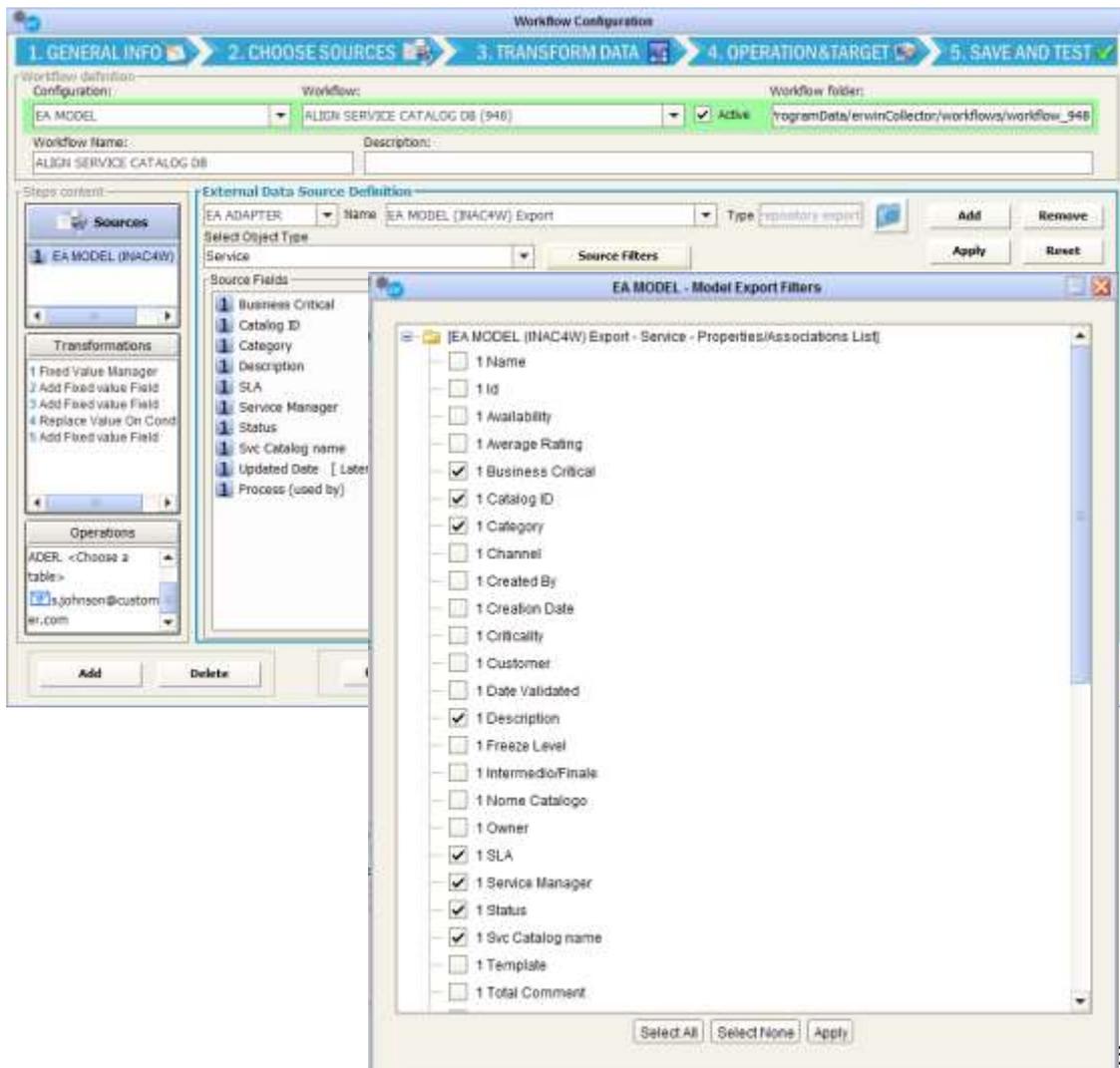
with the proper DB type, server, port, database name, user, password for the target

- **CREATE WORKFLOW TO ALIGN SERVICE CATALOG DATABASE**

Press the “Workflow configuration” button on the Home Page and configure the following workflow choosing the model configuration according to requirements (please note that the model configuration is mandatory for a given model, only for “Load, Sync or Delete” operation against that model)

### **SOURCE DEFINITION – Source 1**

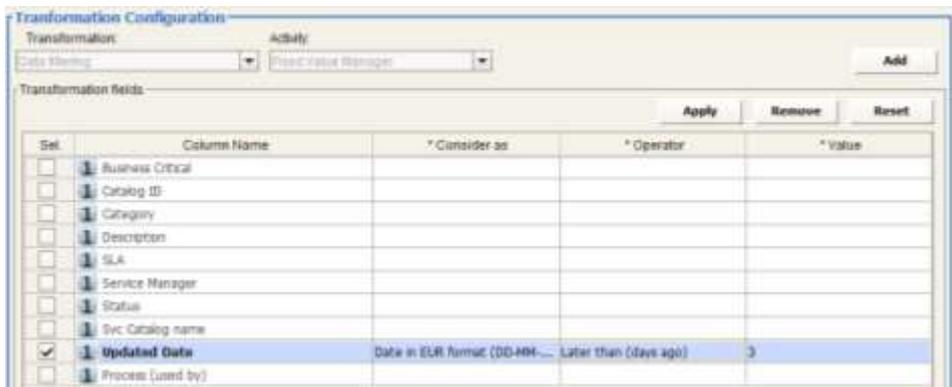
Choose CM Adapter and the specific CM Model Export adapter from the dropdown list; then pick the “Service” object type from the list and check the desired properties / associations from the “CM Filters” interface:



### **TRANSFORMATION 1 – Filter services at export time**

To optimize the data flow, filter source data in order to export only the more recently updated. Use then a “Data filtering”, “Fixed Value Manager” to manage only services with “Updated Date” up to 3 days before the operation (i.e. running the workflow every 3 days, they will be only needed services, if updated in the last 3 days).

Please note that filters defined as the first transformation will be shown in the source field list (see picture above) and executed at export time (if a CM Adapter is the source for filter fields):



### **TRANSFORMATION 2/3 – Add Fixed Value fields for target Business Critical fields**

The target database stores the Business Criticality information in a bit field, with “0” or “1” values. In CM there is a checkbox field, exported by CM Adapter as “True” / “False” values.

A text conditional replace is then needed so that two different fixed value fields, with values 0 and 1 respectively, replace “False” and “True” in the following replace transformation (see later):

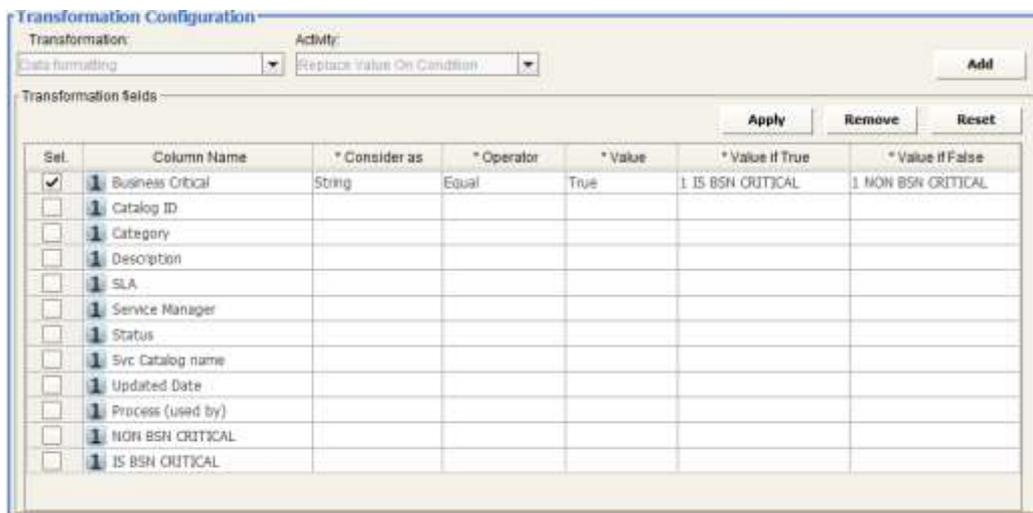




**TRANSFORMATION 4 – Prepare Application name column into Vendor dataset**

Vendors are to be imported as Application associated objects, but the Vendor file does not contain the application name, which is needed to execute the operation.

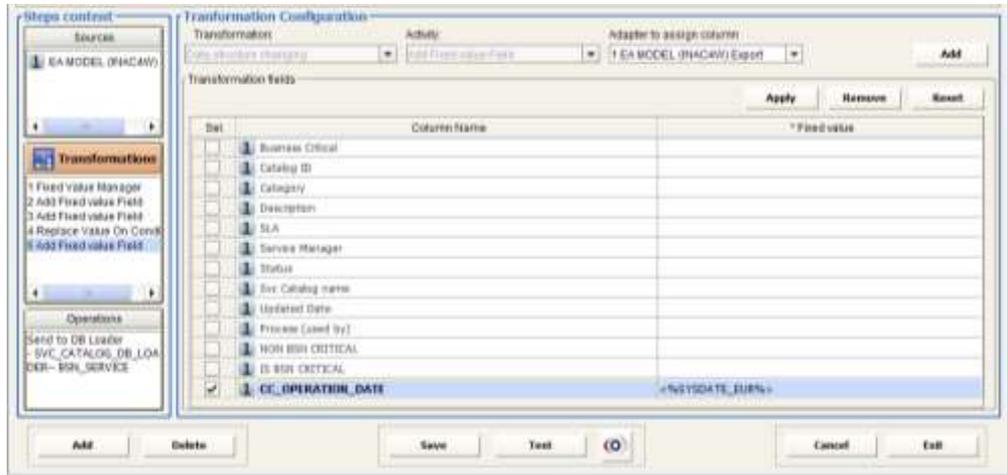
A “Replace Value on Condition” is needed to decode the “True”/“False” value for the source field hosting Business Criticality information in Modeler to the target 1/0 format:



**TRANSFORMATION 5 – Add Fixed Value to fill a datetime target field**

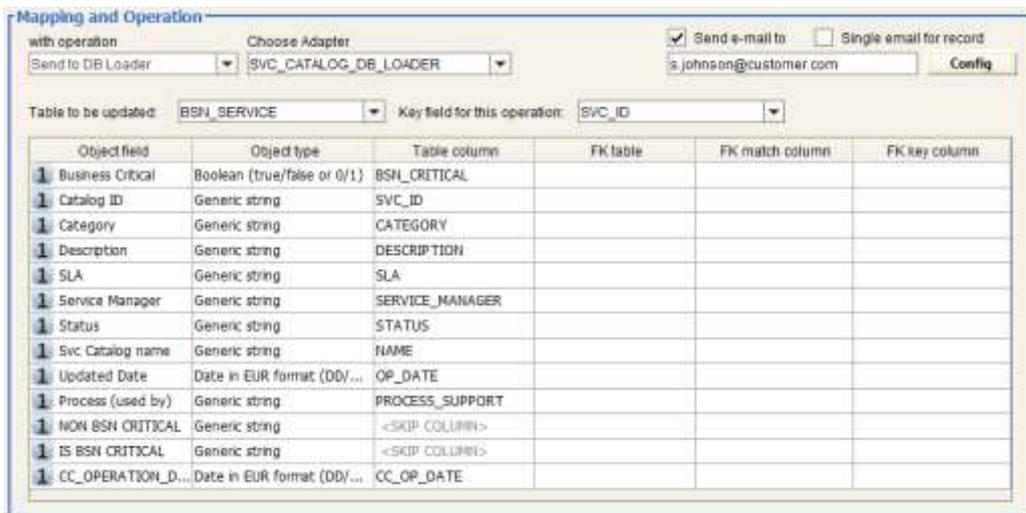
Let’s suppose that a datetime field in the target table is uploaded with the DT execution datetime, for any created/updated record.

In such a case, a fixed value field, with value equal to parameter “<%SYSDATE\_EUR%>” (to get a European “DD/MM/YYYY” format, or “<%SYSDATE\_USA%>” for a “MM/DD/YYYY” format or “<%SYSDATE%>” for a standard “DDDD/MM/YY” UTC format):

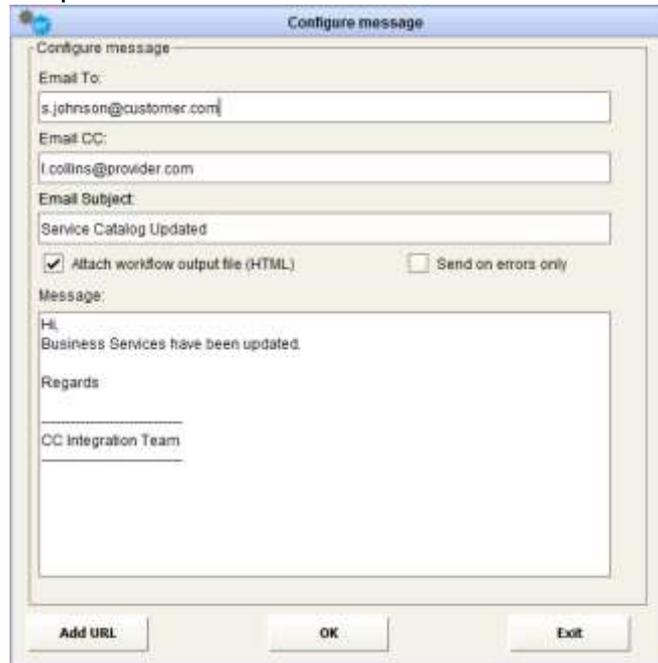


### **OPERATION – Send to DB Loader**

In the “Mapping and Operation” step, choose the previously configured DB Loader, the target table, and the target field to be used as a key for the operation. Then map all the relevant source fields to target fields. In case of datetime, boolean or numeric target fields, the source datatype must be specified to ensure a correct data transfer:

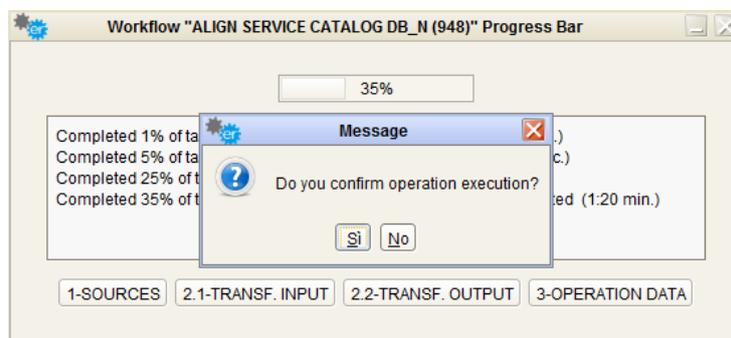


**Email** can be configured with default text (simply filling the “email to” field) or with custom properties (“Conf”). Please refer to the “Email configurations” chapter for a detailed description on the email configuration options.



- **TEST THE WORKFLOW AND CHECK RESULT**

Test the configured workflow with the “Test” button, and follow its execution through the progress bar or Logs and email notifications. At the end of the workflow execution, check the result in the target database:



SVC_ID	NAME	DESCRIPTION	CATEGORY	SERVICE MANAGER	AVAILABILITY	SLA	BBL_CATEG	STATUS	UP_DATE	CC_UP_DATE
1	CPRI-A1	Prodotti servizi	Service Area	Graham Billing	24H	Gold	1	Active	2016-10-09 09:31:55.000	2016-10-09 21:43:18.000
2	S-CT-A1	Information Services	Service Area	Real Wilson	N/A	Platinum	1	Active	2016-10-09 09:47:53.000	2016-10-09 21:43:18.000
3	S-CT-A4-M01	Analytics Services	MacroService		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000
4	S-CT-A4-M01-S01	Service Analytics e di Reportistica	Service		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000
5	S-CT-A4-M02	Data Services	MacroService		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000
6	S-CT-A4-M02-S01	Document Management e Co	Service		N/A		0	Active	2015-12-22 10:00:11.000	2016-10-08 10:00:18.000
7	S-CT-A4-M03	Open Data	MacroService		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000
8	S-CT-A4-M03-S01	Customer Open Data	Service		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000
9	S-CT-A5	Infrastructure, Operation & De...	Service Area		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000
10	S-CT-A5-M01	Progettazione e realizzazione i...	MacroService		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000
11	S-CT-A5-M01-S01	Progettazione e realizzazione i...	Service		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000
12	S-CT-A5-M02	Operation Management	MacroService		N/A		0	Active	2015-12-14 10:37:26.000	2016-10-08 10:00:18.000

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## 1.3 Align Federated Models

This example describes the following use case: an enterprise organized its EA information in two federated models, one specifically aimed to support IT and the second for more general business analysis purposes. The two models partially share the same metamodel, given to different IT and business teams requirements.

The first model is used to synchronize the second about application data, but only for a specific subset of applications, i.e. applications with a given lifecycle status (“production”) and only for those coming from the enterprise application catalogue (the source of application information for IT models, while the second hosts applications from other sources, relevant for the business).

Let us suppose that:

- **Application data** are in the source **CM model** in a dedicated **object type**:



- a **second CM Model** hosts **application data**, which is needed to execute Business Analysis in a dedicated object type, and a slightly different metamodel from the IT Model:



A DT workflow aligning the database of two CM models can be configured with the following steps:

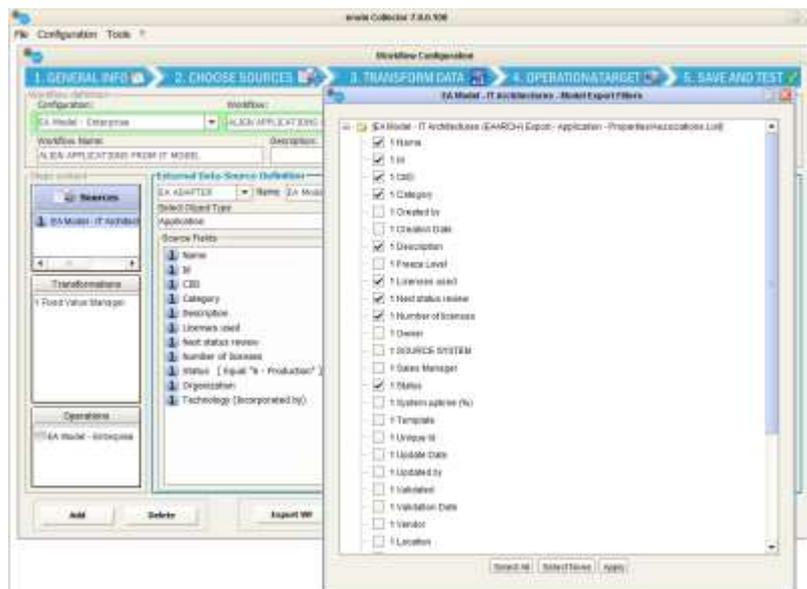


- **CREATE WORKFLOW TO ALIGN FEDERATED MODELS**

Press the “Workflow configuration” button on the Home Page and configure the following workflow choosing the model configuration according to requirements (please note that the model configuration is mandatory for a given model, when the “Load, Sync or Delete” operation must be executed on that model)

**SOURCE DEFINITION – Source 1**

Choose the CM Adapter and specific CM Model Export adapter (i.e. the IT Model one) from the dropdown list; then pick the “Application” object type from the list and check the desired properties/associations from the “Source Filters” interface:



## TRANSFORMATION 1 – Filter Application in “Production”

To optimize the data flow, filter source data in order to export only the more recently updated. Use then a “Data filtering”, “Fixed Value Manager” to manage only services with “Status” equal “6 – Production”.

Please note that filters defined as the first transformation will be shown in source field list (see picture above) and executed at export time (if an EA Adapter is the source for filter fields):

The screenshot shows the 'Transformation Configuration' dialog box. The 'Transformation' dropdown is set to 'Data filtering' and the 'Activity' dropdown is set to 'Fixed Value Manager'. The 'Transformation fields' table is as follows:

Set	Column Name	* Consider as	* Operator	* Value
<input type="checkbox"/>	Name			
<input type="checkbox"/>	Id			
<input type="checkbox"/>	CIID			
<input type="checkbox"/>	Category			
<input type="checkbox"/>	Description			
<input type="checkbox"/>	Licenses used			
<input type="checkbox"/>	Next status review			
<input type="checkbox"/>	Number of licenses			
<input checked="" type="checkbox"/>	Status	String	Equal	6 - Production
<input type="checkbox"/>	Organization			
<input type="checkbox"/>	Technology (Incorporated by)			

## OPERATION – Sync CM Repository

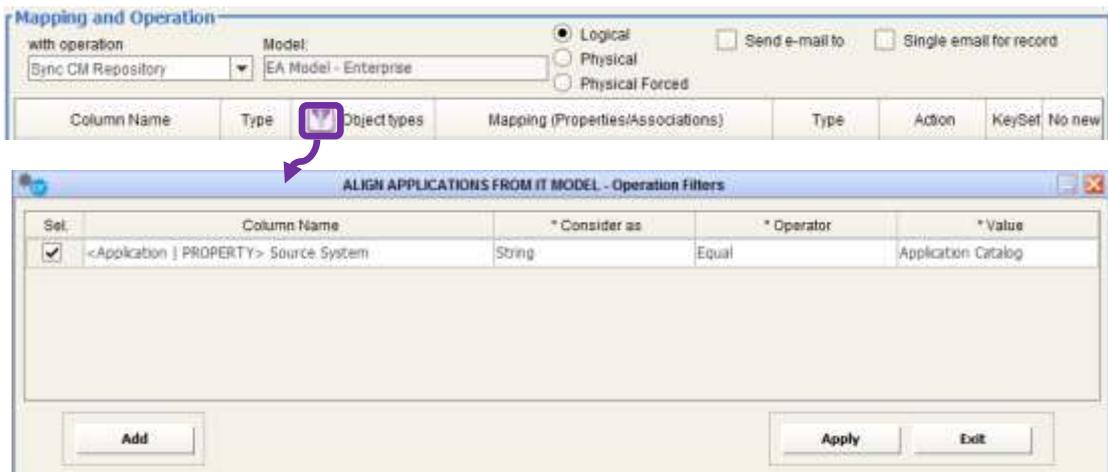
In the “Mapping and Operation” step, choose “Sync CM Repository”. The target model is the one related to the Model Configuration the workflow has been assigned to. Then map all the relevant source fields to the target fields for “Application” object type. Define the desired synchronization action (“Logical”, “Physical” or “Physical Forced” deletion, which will affect redundant objects in the target model in comparison with the exported list from the source model):

The screenshot shows the 'Mapping and Operation' dialog box. The 'with operation' dropdown is set to 'Sync CM Repository' and the 'Model' dropdown is set to 'EA Model - Enterprise'. The 'Logical' radio button is selected. The 'Mapping (Properties/Associations)' table is as follows:

Column Name	Type	Object types	Mapping (Properties/Associations)	Type	Action	KeySet	No new
Name	Generic...	Application	<OBJ NAME> Common Name	Single-line text		<input type="checkbox"/>	<input type="checkbox"/>
Id	Generic...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
CIID	Generic...	Application	<PROPERTY> CI ID	Single-line text		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category	Generic...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
Description	Generic...	Application	<PROPERTY> Description	Multi-line text	Replace	<input type="checkbox"/>	<input type="checkbox"/>
Licenses used	Generic...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
Next status review	Date in...	Application	<PROPERTY> Next status review	Date / Time		<input type="checkbox"/>	<input type="checkbox"/>
Number of licenses	Generic...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
Status	Generic...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
Organization	Generic...	Application	<PROPERTY> Vendor	Drop-down list		<input type="checkbox"/>	<input type="checkbox"/>
Technology (Incorpora...	Generic...	Application	<ASSOCIATION> Technology (Incorporated ...		Forced replace	<input type="checkbox"/>	<input type="checkbox"/>

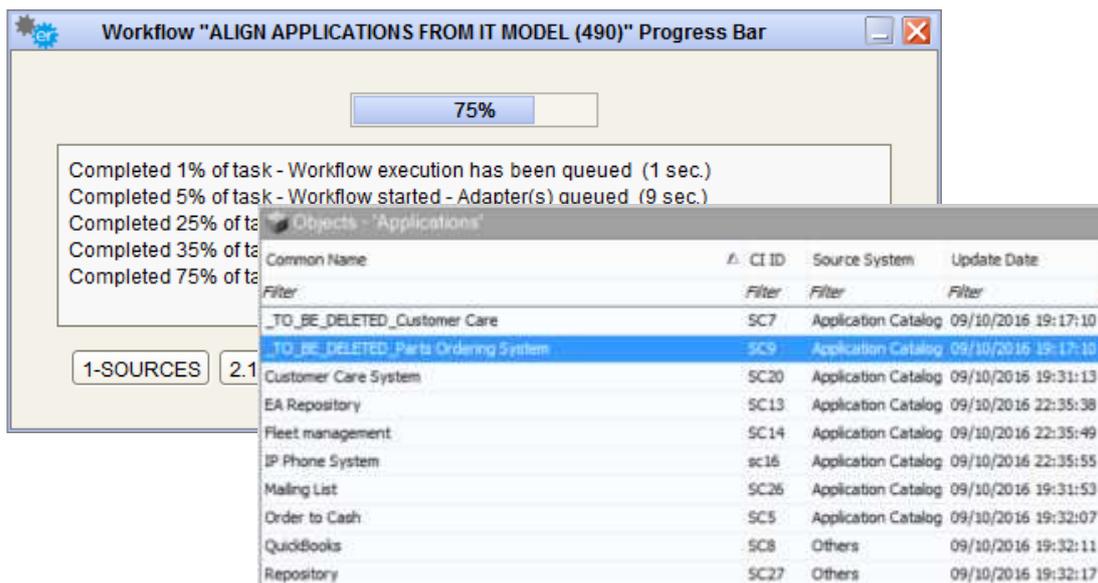
Please note the keyset on the operation defined to be the CI ID of the applications is a reasonable setting because the second model receives application data from various sources. For object types with instances coming only from the source model, it can be also used the Erwin Id.

To apply the synchronization within requirements (it must occur only for applications with a specific source system - the Application Catalogue) configure a filter for the synch operation, by double clicking on the filter icon on the "Object Type" column:



- TEST THE WORKFLOW AND CHECK RESULT

Test the configured workflow with the "Test" button and follow its execution through the progress bar, Logs and email notifications. At the end of workflow execution, check the result in the target CM Model:

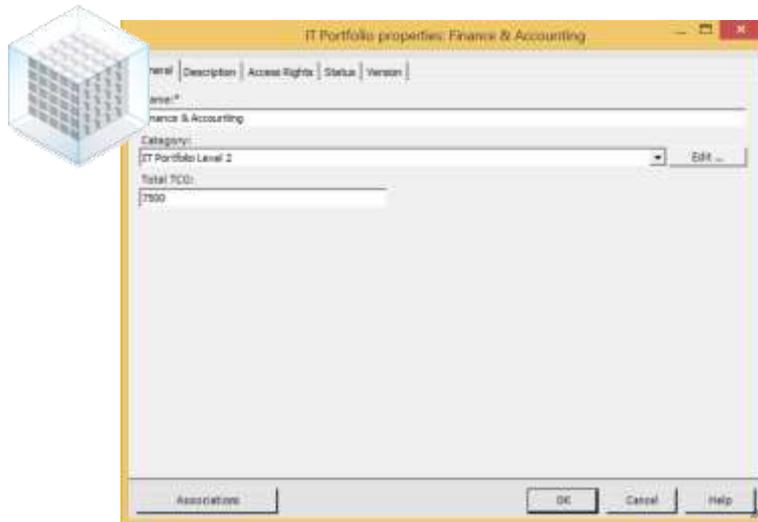


## 1.4 Deriving values and update consistency data

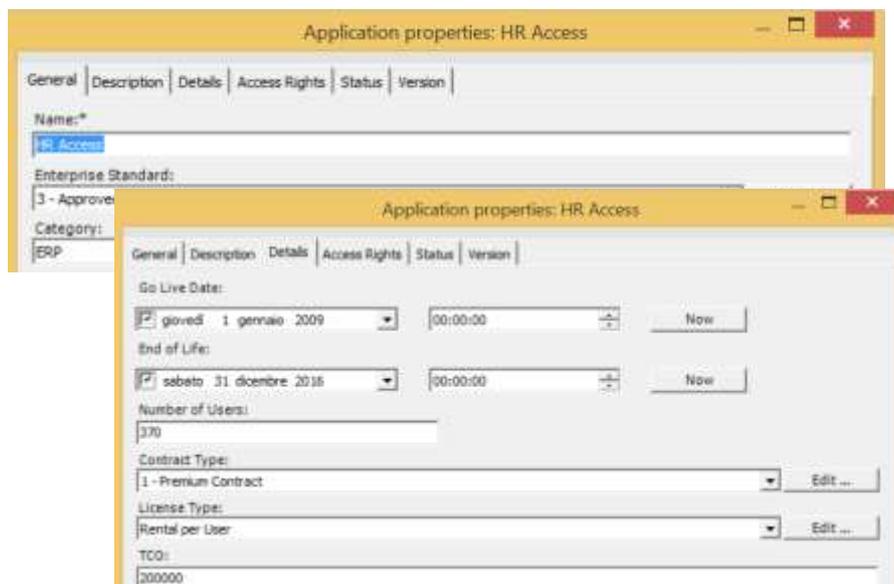
The example describes the following use case: an enterprise organized its EA information in a model which supports general business analysis purposes with reports and dashboards. One of them is about IT Portfolios, and shows summary information to managers.

Let us suppose that:

- **IT Portfolio data** are in the source **CM model** in a dedicated **object type**:



and the **“Total TCO”** value must be calculated as the sum of associated **application TCO**, for the ones of **“ERP” category** and a **number of users greater than 100**.



A DT workflow calculating Total TCO for IT Portfolios can be configured with the following steps:

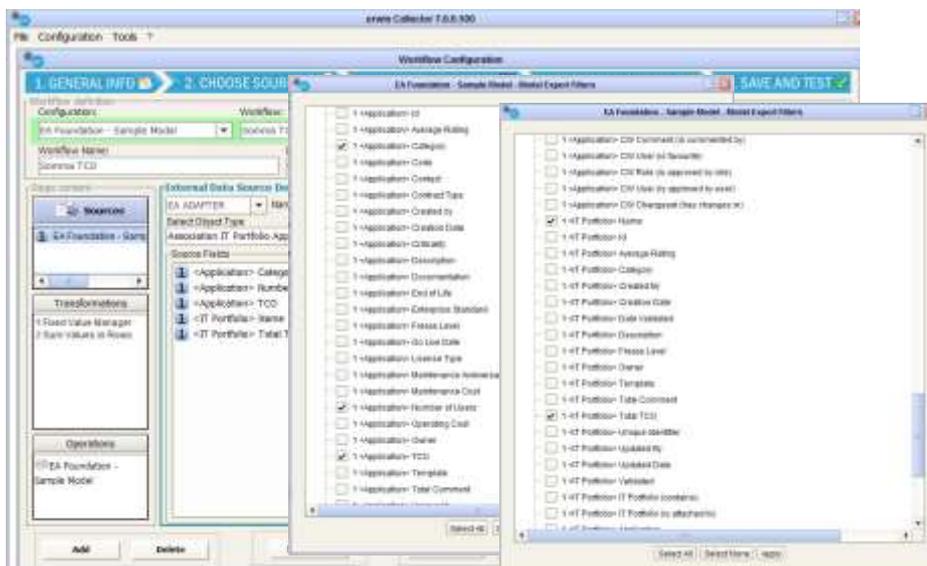


- CREATE WORKFLOW TO DERIVE VALUES AND UPDATE CONSISTENCY DATA

Press the “Workflow configuration” button on the Home Page and configure the following workflow choosing the model configuration according to requirements (please note that the model configuration is mandatory for a given model, when the “Load, Sync or Delete” operation must be executed towards that model)

### **SOURCE DEFINITION – Source 1**

Choose CM Adapter, and specific CM Model Export adapter (i.e. the IT Model one) from the dropdown list; the select “Association IT Portfolio-Application” from the Object Type list, and select <Application> Category, <Application> TCO, <Application> Number of Users, <IT Portfolio> Name, <IT Portfolio> Total TCO fields:



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### **TRANSFORMATION 1 – Filter application by “category” and “number of users”**

To export the relevant application, set a filter on “category” and “number of users” with “DATA FILTERING”-“Fixed Value Manager” to manage applications having:

- “Category” equal to “ERP”
- “Number of users” greater than “100”.

The screenshot shows the 'Transformation Configuration' dialog box. The 'Transformation' dropdown is set to 'Data filtering' and the 'Activity' dropdown is set to 'Fixed Value Manager'. The 'Transformation fields' table is as follows:

Sel.	Column Name	* Consider as	* Operator	* Value
<input checked="" type="checkbox"/>	<Application> Category	String	Equal	ERP
<input checked="" type="checkbox"/>	<Application> Number of Users	Numeric in EUR format (ex ...	Greater than (numeric value)	100
<input type="checkbox"/>	<Application> TCO			
<input type="checkbox"/>	<IT Portfolio> Name			
<input type="checkbox"/>	<IT Portfolio> Total TCO			

### **TRANSFORMATION 2 – Derive IT Portfolio “Total TCO” from associated applications**

Choose a “DATA DERIVATION”, “Sum Values in Column” transformation and set:

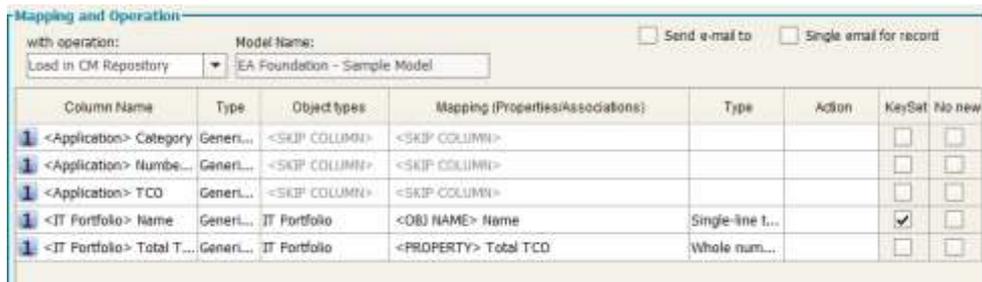
- The “<Application> TCO” column as “Source Column (to sum values from)”
- The “<IT Portfolio> Name” column as “Key (for data aggregation)”
- The “<IT Portfolio> Total TCO” as “Result” for the transformation

The screenshot shows the 'Transformation Configuration' dialog box. The 'Transformation' dropdown is set to 'Data derivation' and the 'Activity' dropdown is set to 'Sum Values in Rows'. The 'Transformation fields' table is as follows:

Sel.	Column Name	* Field category
<input type="checkbox"/>	<Application> Category	
<input type="checkbox"/>	<Application> Number of Users	
<input checked="" type="checkbox"/>	<Application> TCO	Source column (to sum values from)
<input checked="" type="checkbox"/>	<IT Portfolio> Name	Key (for data aggregation)
<input checked="" type="checkbox"/>	<IT Portfolio> Total TCO	Result

## OPERATION – Sync CM Repository

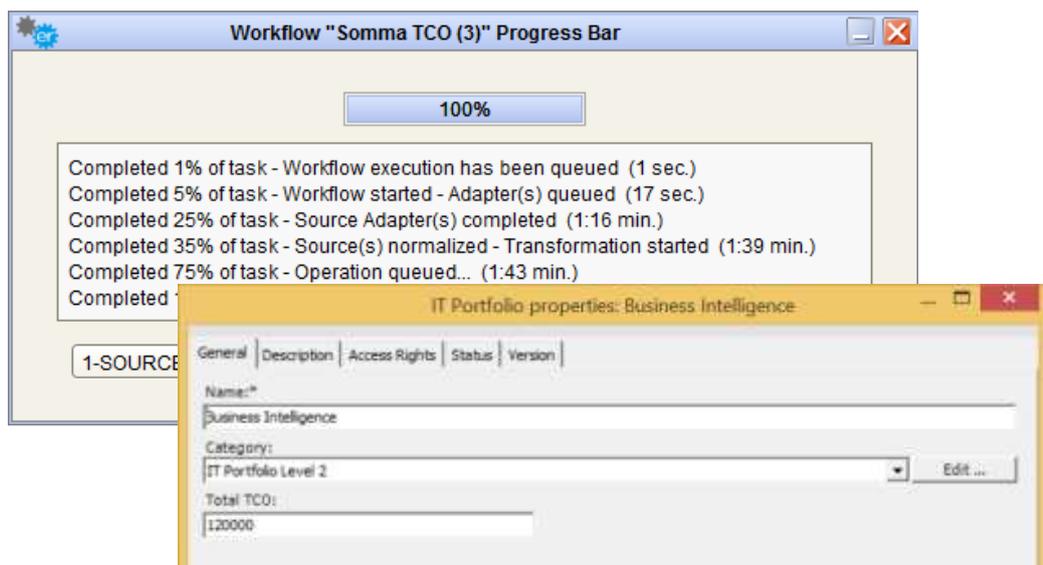
In the “Mapping and Operation” step, choose the “Load CM Repository”. The target model is the one related to the Model Configuration which the workflow has been assigned. Then map all the relevant source fields to target fields:



Column Name	Type	Object types	Mapping (Properties/Associations)	Type	Action	KeySat	No new
<Application> Category	Gener...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<Application> Numbe...	Gener...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<Application> TCO	Gener...	<SKIP COLUMN>	<SKIP COLUMN>			<input type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Name	Gener...	IT Portfolio	<OBJ NAME> Name	Single-line L...		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<IT Portfolio> Total T...	Gener...	IT Portfolio	<PROPERTY> Total TCO	Whole num...		<input type="checkbox"/>	<input type="checkbox"/>

- TEST THE WORKFLOW AND CHECK RESULT

Test the configured workflow with the “Test” button and follow its execution through the progress bar, Logs and email notifications. At the end of the workflow execution check the result in CM Model IT Portfolios:



Workflow "Somma TCO (3)" Progress Bar

100%

Completed 1% of task - Workflow execution has been queued (1 sec.)  
Completed 5% of task - Workflow started - Adapter(s) queued (17 sec.)  
Completed 25% of task - Source Adapter(s) completed (1:16 min.)  
Completed 35% of task - Source(s) normalized - Transformation started (1:39 min.)  
Completed 75% of task - Operation queued... (1:43 min.)  
Completed

1-SOURCE

IT Portfolio properties: Business Intelligence

General | Description | Access Rights | Status | Version

Name:\*  
Business Intelligence

Category:  
IT Portfolio Level 2

Total TCO:  
120000