



Informatica[®] Axon Data Governance
5.2

User Guide

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Publication Date: 2019-05-16

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Preface

The Axon User Guide is intended to help data stewards, administrators, business users and technical users to work with Axon.

This guide covers the tasks that you can perform using the Axon web UI.

Informatica Resources

Informatica Network

Informatica Network hosts Informatica Global Customer Support, the Informatica Knowledge Base, and other product resources. To access Informatica Network, visit <https://network.informatica.com>.

As a member, you can:

- Access all of your Informatica resources in one place.
- Search the Knowledge Base for product resources, including documentation, FAQs, and best practices.
- View product availability information.
- Review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Knowledge Base

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Informatica Product Availability Matrixes

Product Availability Matrixes (PAMs) indicate the versions of operating systems, databases, and other types of data sources and targets that a product release supports. If you are an Informatica Network member, you can access PAMs at

<https://network.informatica.com/community/informatica-network/product-availability-matrixes>.

Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services. Developed from the real-world experience of hundreds of data management projects, Informatica Velocity represents the collective knowledge of our consultants who have worked with organizations from around the world to plan, develop, deploy, and maintain successful data management solutions.

If you are an Informatica Network member, you can access Informatica Velocity resources at <http://velocity.informatica.com>.

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Informatica Marketplace

The Informatica Marketplace is a forum where you can find solutions that augment, extend, or enhance your Informatica implementations. By leveraging any of the hundreds of solutions from Informatica developers and partners, you can improve your productivity and speed up time to implementation on your projects. You can access Informatica Marketplace at <https://marketplace.informatica.com>.

Informatica Global Customer Support

You can contact a Global Support Center by telephone or through Online Support on Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:

<http://www.informatica.com/us/services-and-training/support-services/global-support-centers>.

If you are an Informatica Network member, you can use Online Support at <http://network.informatica.com>.

CHAPTER 1

Getting Started with Axon

This chapter includes the following topics:

- [Introduction to Axon, 10](#)
- [Users, 12](#)

Introduction to Axon

Axon Data Governance is a knowledge repository tool that you can use to document the data items that require governance. Data owners, data stewards, subject matter experts, and other responsible stakeholders collaborate across the organization to progressively chart the business reality of data, its lineage, and usage across processes, policies, projects, and regulation.

Inventorize

To effectively use Axon, you must inventorize the important data assets of your organization. Axon is a central repository for the frequent tasks performed by any department and the data assets used in the department.

Axon does not store any source data. Axon maintains an inventory of metadata such as systems, data sets, attributes, definitions, and projects. Content managers can manually create data objects or bulk upload them to Axon. Administrators can assign stakeholders to objects and establish ownership of data.

You can create the following types of data and technology related data objects:

- Attributes
- Data Sets
- Data Quality
- Glossary
- System Interface
- System

You can create the following types of business and change related data objects:

- Business Area
- Change Request
- Committee
- Policy

- Process
- Project
- Role

You can create the following types of organizational data objects:

- Business Area
- Capability
- Client
- Legal Entity
- Org Unit
- People
- Product

You can create the following types of regulatory data objects:

- Geography
- Regulation
- Regulator
- Regulatory Theme

Connect

Axon connects data in the inventory and displays the connected data in dashboards, maps, and advanced search results. Content managers can manually define connections between objects. Axon consumers can view these connections after they open the object.

Axon displays lineage connections between objects as maps. You can view two types of map. You can view a local map when you open an object, or a system wide Insight map from the toolbar. You can narrow down the scope of the Insight map when you perform a Unison search. Unison search is a powerful search function that searches for the objects and the linked objects in all the available facets.

Axon displays dashboards to represent the health of your data. Axon displays local dashboards and system-wide dashboards. The local dashboard displays the data quality of the active object, including a roll-up of the data quality scores of linked objects. You can configure the information that Axon displays in the system-wide dashboard.

Control

Axon provides an integrated view of roles and responsibilities. Consumers of data can view object information from the Axon interface without logging in. Axon ensures that content is managed responsibly by permitting only assigned users to edit objects.

You can manage users in Axon with profiles and roles. Profiles control the level of access that a user has while working with Axon.

Content managers can assign stakeholders to objects. Administrators assign stakeholder roles to users. Every object displays a list of stakeholders. Stakeholders establish who in the organisation has knowledge pertinent to the object. This allows all users to communicate with the right people when considering definitions and understanding the effects of changes.

Users

You can view objects in Axon without logging in. After logging in, you can perform tasks on objects based on the user profile that the administrator has associated with your account.

An Axon user can perform the following different types of tasks based on the profile that is assigned to their account:

- Administering users and managing Axon
- Creating and managing content
- Viewing content

User Profiles

Every Axon user has a user profile. The type of profile decides the tasks that a user can perform in Axon. An administrator associates user profiles to user accounts.

Users can have one of the following user profiles associated with their account:

WebUser

A WebUser is the most basic user profile in Axon. WebUsers have permission to view content.

An administrator can provide advanced permissions to a WebUser on a facet by assigning a role. The WebUser then becomes a stakeholder for the facet and can perform other tasks to create or manage content for the facet. For example, a WebUser with the relevant role and permission can bulk upload data to Axon.

Admin

Users can perform administrative tasks on facets if they are assigned the Admin profile. Users with the admin profile have access to the Admin Panel.

Users with the Admin profile can perform the following tasks from the Admin Panel:

- Assign roles and permissions
- Use the static page editor
- Manage locks
- Reset passwords
- View Enterprise Catalog menu items
- Bulk upload objects
- View non-public and deleted objects
- View licensed users
- Download logs

SuperAdmin

Users with the SuperAdmin profile can perform all administrative tasks in Axon. In addition to the tasks that a user with the Admin profile can perform, a user with a SuperAdmin profile can perform the following tasks:

- Create roles and permissions
- Configure default workflows
- Configure drop-downs

- Edit the glossary rules engine
- Bulk upload objects
- Import Data
- Configure automatic glossary assignment
- View non-public and deleted objects
- View licensed users
- Download logs
- Customize and configure Axon

CHAPTER 2

Search and View

This chapter includes the following topics:

- [Searching and Viewing Objects Overview, 14](#)
- [The Axon Interface, 15](#)
- [Searching for Objects, 18](#)
- [Working with the Search Results, 21](#)
- [Viewing Object Details, 24](#)
- [Viewing My Items, 28](#)
- [Following Objects, 28](#)
- [Viewing Notifications, 28](#)
- [Managing Locks, 29](#)
- [Viewing Object Dashboards, 30](#)
- [Viewing Data Privacy Metrics, 32](#)
- [Viewing Insight Maps, 35](#)
- [Viewing Local Maps, 39](#)
- [Viewing Process Maps, 39](#)
- [Viewing Data Quality Reports, 41](#)

Searching and Viewing Objects Overview

You can access Axon using a web browser. After you open Axon, you can search for objects in the Axon, manage notifications, and view maps and dashboards. To look up objects, you do not need to be logged in.

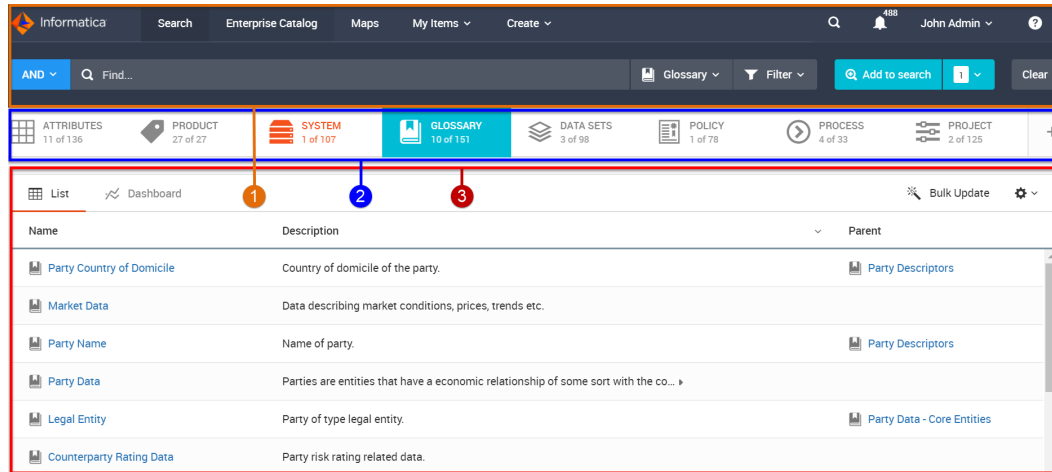
From the Axon home page, you can log in using your username and password. Once you log in, you can create objects, view notifications and other personalized items.

The Axon Interface

Search and view objects from the Axon interface. You can log in to Axon from the landing page, access Unison and Quick searches, and view Axon facets and objects. The landing page and Unison are the two main pages of Axon.

After you run a Unison search, you can view the objects in the search results.

The following image shows the Axon interface:



1. Toolbar. Visible from the landing page and Unison.
2. Facets. Visible in Unison.
3. Grid. Visible in Unison.

Toolbar

Axon displays a toolbar at the top of the Axon interface. The toolbar has menus that you use to view more options to perform specific actions. The menu items in the toolbar change based on the Axon page that you are accessing and whether you are logged in or not.

The following table lists the menu items visible in the toolbar from the landing page and the login criteria to see the options:

Toolbar Option	Login Required?	Description
Search	No	Search for Axon objects in the catalog using Unison search.
Quick Search	No	Search for Axon objects and directly open the object from the list of results.
Login	No	Log in to Axon.
Help	No	Access the online help for Axon.
My Items	Yes	View the recently visited objects, the objects that you are following, and the objects in which you have a stakeholder role.

Toolbar Option	Login Required?	Description
Create	Yes	Create new objects based on your role.
Notifications	Yes	View your Axon notifications and actions that you need to perform.
Locks	Yes	Prevent users from editing an object. You can view objects that you have locked and manage locks from the My Locked Items pop-up.
User Menu	Yes	Perform the following actions from the user menu: <ul style="list-style-type: none"> - Access your page in the people facet and manage objects that you are following. - Access the Admin Panel if you have an administrator account. - Log out of Axon.

The following table lists the menu items visible in the toolbar from Unison and the login criteria to see the options:

Toolbar Option	Login Required?	Description
Maps	No	View search results as an interactive diagram using Insight Maps.
Enterprise Catalog	Yes	Access the Resources and Fields facets to link enterprise metadata from Enterprise Data Catalog.

Facets

Axon displays objects in the Unison page categorized by facets. Axon uses facets to describe different aspects of an organization.

Unison does not display all the facets by default. Axon contains a large number of facets and not all of them might be relevant to your organization. If you want to show or hide a facet, click the **+** icon to the right of the Unison page and select the checkbox against the facet from the drop-down menu. You can choose to save the layout so that you can view the facets that you want whenever you log in. When you save the layout, Axon saves the grid columns along with the facet. When you switch from one facet to another, Axon automatically changes the facet on the Unison search toolbar. Each facet has a counter that displays the number of objects in the facet and how many of them are currently visible. Axon filters the objects in a facet based on the search keyword in the Unison search.

Grid

Axon displays objects in a grid below the facets. The grid consists of **List** and **Dashboard** tabs. If you open Unison without searching for any keyword, Axon displays all the objects from the catalog in the grid.

List

Axon displays objects on the **List** tab of the grid based on the search criteria. The **List** tab consists of grid columns that you can configure. The grid columns vary based on a facet. The number of rows in the grid

increases dynamically as you scroll down. The objects in the grid are not sorted. You can choose to sort based on the columns that contain the sort arrow icon next to it.

The following table describes sample grid columns:

Column Name	Description
Name	Name of the object.
Description	Description of the object.
Type	Type of the object.
Axon Status	Status of the object. Permitted values: Active, Inactive, Pending Review, Obsolete, Deleted.
Long Name	Full name of the object.
Lifecycle	Lifecycle of the object. The permitted values are based on the object type. An administrator can customize these values.
Classification	Classification of the object. The permitted values are based on the object type. An administrator can customize these values.

Dashboard

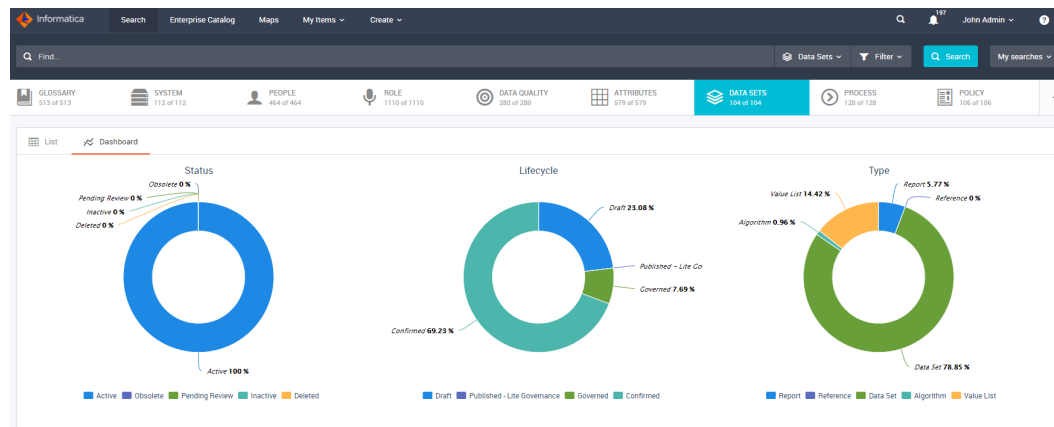
Axon displays search results as a dashboard for each facet. The dashboard provides a visual representation of data based on the search results that you view in the **List** tab.

If you click the **Dashboard** tab from the grid without performing a Unison search, Axon uses data available for all the objects in the facet to calculate the dashboard results. After you perform a Unison search, Axon calculates and displays graphs based on the search results for each facet on the **Dashboard** tab.

The dashboard items differ based on each facet. For example, when you view the dashboard for a Data Set facet, Axon displays graphs for parameters, such as Status, Lifecycle, and Type. When you view the dashboard for a Process facet, Axon displays graphs parameters, such as Type, Lifecycle, Status, Classification, Automation, and Level.

Hover the mouse over a graph to see the breakdown of a parameter. Click a color in the legend below the graph to remove a value from the graph. Axon redraws the dashboard to display graphs based on the remaining values.

The following image shows a sample dashboard for a Data Set facet:



Searching for Objects

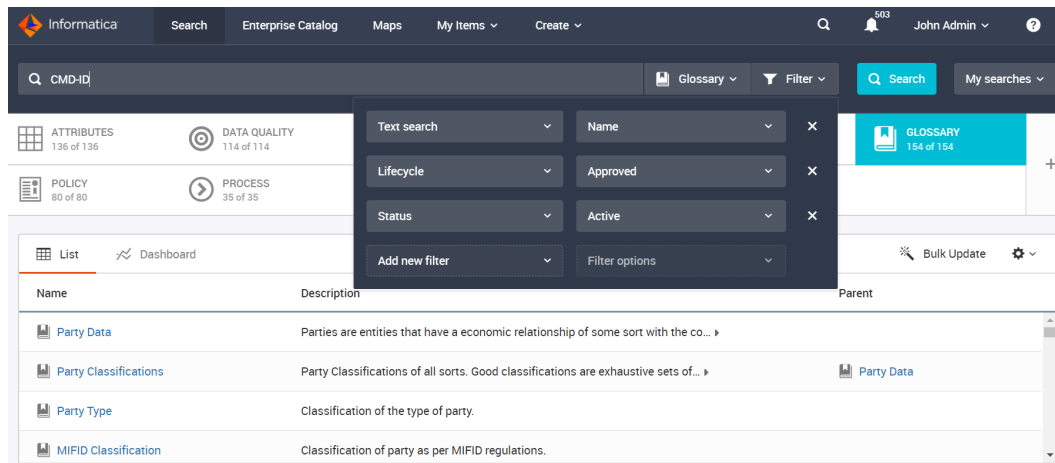
Use Unison and Quick searches to search for objects in Axon. Searching for an object is the quickest way to view the object properties.

Unison Search

Unison search is a powerful search function that is central to Axon. When you run a Unison search, Axon searches for the objects and the linked objects in all the available facets. Axon searches for objects in all facets during each Unison Search, regardless of whether or not the facets are hidden.

Axon filters the objects in the facets based on the keyword that you searched. You can select a facet in which you want to perform the search. When you click the menu to select a facet, you can view the active and hidden facets. If you select another active facet, Axon automatically switches to the facet that you selected in the **Facets** layout. If you click a hidden facet, the facet is added to the active facets and appears in the **Facets** layout. You can configure the filter options to refine the search. The filter options appear based on the facet that you select. For example, you want to search the glossary term CMD-ID that has an approved lifecycle and active status. You enter the keyword as CMD-ID and select the **Glossary** facet. Configure the filter options such as Text search, Lifecycle, and Status, and then perform a search to find accurate results.

The following image shows a sample Unison search criteria:



When Axon applies an active filter to a facet based on the search keyword, the color of the facet changes to orange. You can see a count of the number of objects in a facet next to the facet name. After you search for an object, Axon updates the counter in each facet to show the number of assets that are linked to the search keyword and filters the objects in the facets to display only those that are linked. After you search for the first time, Axon creates and displays a search counter with a numeric digit drop-down. The search counter increases based on the number of searches. You can view the current active searches that you performed from the search counter drop-down. You can view all the saved searches from the **My searches** list.

When you open maps, Axon displays objects linked to the keyword that you searched for. You can see how objects in one facet are connected to items in other facets. Unison search uses both direct and indirect connections to display the items that are most relevant to the search.

For some facets, Axon uses a direct connection to filter objects. For example, when you filter for projects, the objects are filtered in the systems, processes, policies, people and glossary facets that are directly connected to the project.

For some facets, Axon uses an indirect connection to filter objects. For example, when Axon filters objects in projects, data sets and attribute facets are filtered based on an indirect link through the system and glossary

items that are connected to the project. Axon first looks at the system and glossary items that the project links to and then determines which data set and attributes are relevant.

You can perform the following tasks after you search for a keyword:

Add to search

You can add a keyword to an existing search. Axon treats the search keywords as an **AND** operation. When you search a keyword for the first time after you log in, you can view the **Add to search** button. When you add a keyword to a search, Axon filters the search results further to only items that match the filter in each facet with an active search. Enter another keyword and click **Add to Search** to add the keyword to an existing search. For example, you first search for the Party Data glossary term. Enter the name "John" in the keyword, select the People facet, and click **Add to search**. Axon refines the search and filters the Party Data glossary term for which the stakeholder is "John".

Clear

Clear the previous search before you start a new search. Click **Clear** next to the **Add to search** button to clear all the searches that you performed.

Unison Search Operators

You can include logical operators in a search query to refine the search results. Apply the logical operators such as AND, OR, and NOT to filter to the search results.

After you log in and search for the first time, you can view the AND drop-down next to the search field.

Use the following operators to refine the Unison search results:

Find

The default operator that you always apply when you perform the first search.

And

The operator adds additional search options to a simple search that you already performed. For example, you want to search for an attribute that is part of a data set and the data set needs to be part of a particular system. When you use the **AND** operator, objects that match both criteria appear in the search results. The **And** operator has a blue background color.

Or

The operator helps search based on any one of the multiple search criteria. For example, you want to search for a data set with the name "Trading" or a system with a "Trading Platform" classification. The search results include all the data sets that start with the name "Trading" and the systems that are classified as "Trading Platform". The **Or** operator has a green background color.

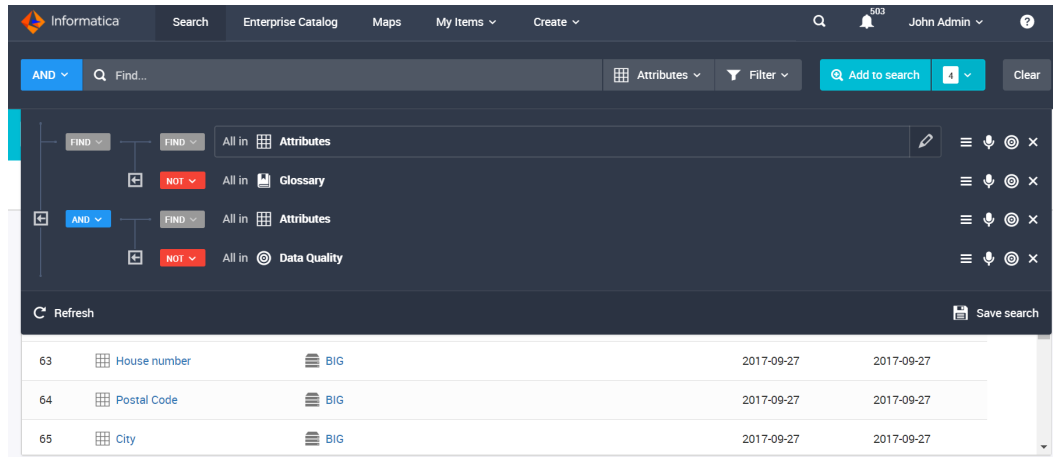
Not

The operator that excludes a specific item from a search. For example, you want to search for a system with the name "Enterprise" excluding the associated glossary "CMD-ID". The **Not** operator has a red background color.

Unison Search Options

Every time you perform a search, Axon adds the search criteria for reuse. Click the count drop-down to view the search options for each search operation that you performed.

The following image shows the various search options that you can use in a Unison search:



You can perform the following operations for a Unison search:

Edit

You can choose to update a search. Click **Edit** and update the keyword and search filter.

Reorder this search

You can choose to perform a specific search operation prior to another search operation from a list of multiple searches. Click the **Reorder this search** icon and drag it upwards or downwards to change the order of search.

Mute this search

You can choose not to run a specific search from a list of multiple searches. Click the **Mute this search** icon to disable the search. Later, if you want to use any other option for the search, you need to click the **Unmute this search** icon.

Run only this search

You can choose to run a particular search from a list of searches. Click the **Run only this search** icon to run a specific search.

Clear this search

If you want to delete a particular search, click the **Clear this search** icon.

Add to group

If you have multiple complex searches, you might want to group specific searches and run them before the rest of the searches. To group searches, click the **Add to group** icon. Axon adds the search to a group. When you run a search, Axon first applies search criteria based on the combination of the group and then based on the rest of the searches. For example, you want to search the attributes that do not contain any glossary or data quality rule. First, you group the search for all the attributes that do not contain any glossary. Next, group the search for all the attributes that do not contain any data quality rule. When you apply the **AND** operator to both the groups, objects that match both criteria appear in the search results.

If you choose to reorder, mute, run, or clear a search that is part of a group, the action applies to all the searches within the group. If you want to separate a group, click the **Remove from group** icon.

Save search

You can choose to save the searches for reuse. Click the **Save search** icon to save the searches. You need to provide a name and description for the search criteria. You can edit a saved search to add more filters. You can save the edited search as an update to the existing search or as a new search.

Refresh

If you want to refresh the search results, click the **Refresh** icon.

Quick Search

Quick Search makes it easy to find objects in Axon across all facets directly. The Quick Search bar is located in the toolbar and is visible from the landing page and Unison. Quick Search searches every item in Axon for a match.

To perform a quick search, click the search icon to expand the menu and type a search keyword. Axon displays a list of terms that match your keyword in a window that opens below the search menu. If you click the name of any object displayed in the Quick Search results, Axon opens the object page.

Quick search looks for the following matches:

- Object names
- Alias name (Glossary facet only)
- Reference ID (for those facets that have one)

As Quick Search allows partial matches, it starts searching as soon as you start typing. Normally you do not need to enter many characters before you are offered results. The search refines itself based on your search keyword.

Quick Search also searches for any glossary item alias names. If any matches are found on the alias term, Axon displays the object's standard name (not the alias) in the results pop-up.

Quick Search may find matches across many facets. When this happens, Axon displays the results ordered by facet. Axon displays only the first three matches per facet in the search window. You can use the scroll bar to see more results in the pop-up.

You can re-order the facets that Axon displays in the search window to move the results that you are interested in. Click the drop-down arrow next to the gear icon in the **Quick Search** menu. Axon displays a list of facets in the **Order Search Results** window. Select the facet that you wish to re-order and click and drag it up or down the list. Axon will remember your preference for the rest of the login session, or until you clear cookies on the page.

Working with the Search Results

You can filter the objects, search within hierarchical facets, and save and share search results after Axon displays the Unison search results.

You can filter the search results based on one or more items shown in any of the grids. Each facet has one or more filters. The filters vary based on the facet. Some facets, including the glossary facet, have options to include items within the same facet that are hierarchically linked to the search term. You can also share the saved search results with other Axon users.

Add Grid Items to Unison Search

You can manually add items from the grid to the current search to refine the search results.

To add items to the current search, you need to select a single row or multiple rows that you want to include from the grid. To select multiple items, use the Shift or Control keys when you click the items.

When you click the **Add to search** button, Axon includes the selected items in the current search and refines search results based on the selected grid items. After you run the search, Axon updates the search counter. When you click the search counter drop-down, you can view the grid items are added to the search operations with the default **And** operator. You cannot edit the grid items search criteria. You can edit the search operators and use other search options, such as reorder the search and mute the search.

Searching in Hierarchical Facets

For many Axon facets, such as Glossary, Process, and Policy, you can organize objects in a logical hierarchy, with a nested series of parent-child relationships. Any facet that offers the ability to associate an object to a parent is a hierarchical facet.

When searching in hierarchical facets there are two special filters available in Unison Search.

You can use the following special filters to search within the hierarchical facets:

Level

You can quickly find objects that are in the top level, first level or second level of nesting. A top-level object is any term that does not have a parent object. A first-level object is the immediate child of a top-level object. A second-level object is the immediate child of a first-level object.

Axon permits any number of levels of nesting but you can search on only the first five levels. Use the check box to select multiple levels to search on.

Children

You can explore a specific chain of parent-child relationships in a facet. When you find a term with children, you can choose to add either the immediate child objects or all child objects to the current search.

Saving and Sharing Searches

You can save and manage frequent searches to easily recreate a specific search results view. You can also share these searches with other Axon users.

Before you perform a search, you can click the **My searches** button to view previous searches. After you perform the first search, the **My searches** button disappears. To view the **My searches** button again, you need to clear the searches.

To save searches, perform a Unison search in as many facets as required. Every time you perform a search, Axon adds the search criteria and displays the count next to the **Add to search** button. Click the count drop-down to view and save the list of searches. Provide a name and description, and save the search.

The following image shows sample searches that you can save:

The screenshot shows the Informatica search interface. At the top, there are navigation tabs: Search, Enterprise Catalog, Maps, My Items, and Create. A search bar contains the query: Party in Attributes in Name AND CMD-ID in Glossary in Name. Below the search bar is a table of search results. A 'Save Search' dialog box is open on the right, showing the search name 'AttribGloss' and the description 'Search results for the Party attribute and CMD-ID glossary'.

Ref.	Name	System	Glossary	Created Date
1	CMD ID	CMD	CMD-ID	2017-09-27
8	CMD Number	FXM	CMD-ID	2017-09-27
43	CMD ID	CRR	CMD-ID	2017-09-27
58	Customer ID	KYC	CMD-ID	2017-09-27
83	Invoicing Party	BIG		2017-09-27

To manage your saved searches, click **Manage searches** from the **My searches** drop-down. You can view all the saved searches in the **Saved Searches** tab. To view or run a search that is shared with you, click the **Searches Shared With Me** tab. When you click the link to the right hand side of the row, Axon automatically runs the search. This search overrides any active search that you started in Axon. You can choose to share searches with others so that they can view the same search results if the other users have the same permissions. The shared search results vary based on the user permissions. The other users cannot modify the shared search. To share a search, **Edit > Share Selected Searches**.

The following image shows the **Manage Search** page:

The screenshot shows the 'Manage Searches' page. It has two tabs: 'SAVED SEARCHES' and 'SEARCHES SHARED WITH ME'. The 'SAVED SEARCHES' tab is active, showing a table of saved searches. The table has columns for Name, Description, Shared With, and Created Date. There are four rows of saved searches listed.

Name	Description	Shared With	Created Date
RegulatoryThemeSearch	RegulatoryThemeSearch		3/1/2018
Data with no Quality	Data with no Quality		2/2/2018
legal datasets	same as name		28/9/2017
Data Sets with no Quality Controls	Data Sets with no Quality Controls		2/2/2018

You can perform the following tasks to manage a search:

- Add a description of what the search does.
- Delete searches that you no longer require.
- Share a search with other Axon users so that they can view the same search results if the other users have the same permissions.
- Access saved searches that are shared with you. If you run a shared search, the search overrides any active search that you have in Axon.

Viewing Object Details

Axon displays information about an object in different tabs. You can open an object and click the tabs to view the object properties. Axon does not display all the tabs in all the objects.

Summary

You can view a summary information of an object in the Summary tab. Axon displays object properties in the Summary tab in different sections.

The Summary tab contains properties in the following sections:

Definition

Object description and any key descriptors that support the description.

May contain one or more of the following properties:

- System
- Usage
- Glossary

Classifications

Describes the main classification of the object. For example, Axon Status and Lifecycle.

Scorecard

Displays key information on how comprehensive the stewarding of the object is. You can view a scorecard for glossary and data set objects.

Documents

Displays supporting files that the data steward has uploaded to the object.

Interfaces

View information about other systems connected to the current system in the **Interfaces** tab. Axon displays object properties in the **Interfaces** tab in different sections.

The **Interfaces** tab contains properties in the following sections:

Maps

Provides a graphical representation of the relationships between objects across different facets.

System Interfaces

Show which other systems are connected to this system. You can edit the system interfaces to configure details about which data flows through the interfaces.

Data Flow Outside The Interfaces

Displays any attribute flow described elsewhere affecting the current system, but which has not been linked to an interface. If you see information in this section, you should explore why this data is not described within an interface, and if required, create a link to an interface.

Attributes

Displays information about each attribute belonging to a Data Set.

Axon displays the following information by default in the **Structure** section:

Name	Description
KDE	Displays a count of how many Process objects have indicated this attribute is a key data element to them. If a number is shown, click into it to see a link to each related Process object.
Name	Name of the attribute as known in the business.
Definition	Definition of the item.
Glossary	Individual attributes linked to a single glossary item. Recommended to facilitate finding data concepts across systems irrespective of their system specific naming.
Origination	Describes how the attribute originated. Permitted values: Created/Set Here, Sourced, Unknown

Axon displays the following information when you choose to display extra columns:

Name	Description
Key	Indicates if the item is a Primary Key in the data set it lives in.
Ref. ID.	Unique reference assigned automatically to each attribute by Axon.
DB Field Name	The name of the field in the database holding the data. Can be an encoded string. For example, database.table.fieldname .
Editability	Options: Read Only, Unknown or Editable - Restricted to List / List with Free Text Override / Free Text
Editability Role	Role of the user who can make edits. Permitted values: Admin Only / Most Users / Restricted User Group.
Requirement	Indicates if the field is mandatory, optional or conditional when a new row is created.
Business Logic	Optional field to describe the context of the business logic.
Data Type	Technical metadata field. Captures the datatype of the attribute in the underlying database as per the SQL92 ISO standard.
Data Length	Technical metadata field. Captures the field length in the underlying database.
Related To	Concatenation of the related Data Set & Attribute
Relationship Type	Describes attribute linking which indicates the nature of the sourcing. Permitted values: Enforced Lookup, Unenforced Lookup, Sourced From
Interface	Populated if the Attribute Link is described via an Interface.
Sourcing Logic	Captures any logic applied to the flow of data. For example, selections or transformations performed.

Relationships

The **Relationships** tab provides a context to the object by displaying where the object is placed in a hierarchy of related objects. You can view information about how individual attributes in a data set link to other attributes in other data sets and systems. The data flow shows the lineage through the systems of your organization.

When you open a Glossary object, you can view the **Hierarchy** and **Relationships** sub-tabs from the **Relationships** tab.

The **Hierarchy** sub-tab provides a single view of all the relationships between glossaries. You can view the hierarchical, parent-child relationships for a Glossary object. You can also view other types of relations for an object that are present in the **Relationships** sub-tab, such as *is identified by*, *is related to*, *is specialism of*, *is classified by*, *is described by*, *is part of*, and *is made up of*. For example, the other types of glossary relations can include relations, such as "Customer is part of a Legal Entity" and "Employee is identified by Employee ID." You can see the other glossary relationships marked in a dark orange color. Axon displays all glossary relationships by default. If you do not want to view the other relationships, clear **Show Relationships**.

The **Relationships** sub-tab displays a visual representation of the object and the relationships with the other objects. The **Relationships** sub-tab does not show the parent-child relationships of an object.

Stakeholders

You can define who in the organisation has knowledge pertinent to the object in the **Stakeholders** tab. This allows all users to communicate with the right people when considering definitions, understanding the effects of changes etc. Axon displays object properties in the **Stakeholders** tab in different sections and sub-tabs. You can add, remove, set delegates in the **Stakeholders** tab.

The Stakeholders tab of a data set contains properties in the following sections:

Data Sets

Displays names of the stakeholders, their roles, and the org unit to which they belong. You can see if the user has accepted the role or not.

Data Attributes

Displays roles of the stakeholders at the attribute level. You can assign one owner and one steward to each attribute.

Stakeholder Community

Displays the wider stakeholder community. If the current active object is connected to any other object in Axon, the stakeholders of those connected items collectively form the wider stakeholder.

Axon displays information about users who follow the object in the **Followers** sub-tab. You can see the names of the followers, the organizational unit to which they belong, their function and the date since when they are following the object.

Values

Displays the values for each attribute that belongs to a Data Set facet. You can upload several values for each attribute that you enter in the **Attributes** tab.

Axon displays the following information in the **Value Updates and Availability** section:

Name	Description
Value Update Frequency	The frequency at which you plan to update the list of values.
Update Frequency Comments	Notes or comments about the frequency at which you plan to update the list of values.
Availability	The method by which you plan to make the list of values available to other applications.
Availability Comments	Notes or comments about the availability of the list of values.

The **Values - Full List** or **Values - Sample Set** section displays the list of values for the Data Set that you have opened. The columns you see depend on the entries that you have made in the **Structure** section of the **Attributes** tab.

To add a new column to the list of values, go to the **Attributes** tab and add the column as a new attribute. After you have added the new attribute entry, select the **Values** tab and click **Edit**. When you download the template file to upload values, you will see the new column that you have added in the **Attributes** tab.

Data Quality

Displays a dashboard of data quality results against the current object. The scope of the maps is limited to only the objects that are connected to the active object.

When you open a data set object, you can view the **Dashboard** and **Rules** sub-tabs from the **Data Quality** tab. The **Rules** sub-tab shows the list of data quality rules for all attributes in a data set. If the attributes within the data set do not contain data quality rules, Axon displays the data quality rules from the upstream data sets in the lineage. Axon checks for the upstream data sets in the lineage till it finds an associated data quality rule for the linked attributes. Axon inherits and displays the first occurrence of all data quality rules from the linked attributes.

In the **Rules** sub-tab, Axon displays the related Data Set and System information for a data quality rule that is inherited from the upstream data sets.

Impact

A key part of Axon is explaining the context of an object, by showing which objects in other facets it has been connected to.

History

Displays a record of all edits that have been made to an object. This shows what was changed, when and by whom. Axon does not delete the history, so there is a full history of the object allowing full traceability.

Change

Displays the current and past change requests that are active for the current object. You can also view custom workflows.

Users of Axon can communicate about changes that they would want to make to objects using change requests. A change request can also be used to notify stakeholders of missing information. Any logged in user can create a change request. Axon creates a workflow based on the change request. Stakeholders review the workflow and act on it.

Viewing My Items

The **My Items** menu allows you to see personalised information on how you have used Axon.

You can perform the following tasks from the **My Items** menu:

- View objects you have visited recently.
- View objects you are following.
- View objects in which you have a Stakeholder role.

Axon displays the following tabs in the **My Items** menu:

- Recent
- Following
- Roles

You can search for objects that Axon displays in any of these tabs. You can narrow down your search by object type.

Following Objects

You can follow an object to get notified when changes are made to the object. As a follower, you are not a direct stakeholders and you will not be included in workflows and change requests. You can be part of a workflow or change request by becoming a part of the discussion.

Axon displays updates about the objects that you are following in the **Activity Stream** in your **My Account** page. If you have set a frequency for activity emails, Axon will email you updates about the object that you are following.

Open an object and click **Follow** in the top right hand corner to follow an object. Once you click **Follow**, your name will appear in the **Following** sub tab of the page.

Viewing Notifications

You can view notifications in Axon or receive emails at a regular intervals.

Notifications in Axon

Axon displays notifications in the notifications center after you log in. The notification centers displays the number of unread notification in the toolbar. Click the bell icon in the toolbar to view new and past notifications. The notification center displays information in the **Roles** and **Workflow** tabs.

The following types of notification appear in the notifications centre:

Roles

You see a notification for all the objects for which you have been assigned a stakeholder role. Click the role title to open the object. You can then click **Yes** or **No** to accept or reject the role assignment. You cannot dismiss notifications in the **Roles** tab.

Workflow

Axon displays a notification when someone raises a change request for an object where you are a stakeholder. You can open the object or the change request from the notification. Click the **X** button to dismiss the notification.

Bulk Upload

You can see the status of bulk upload tasks.

Notifications via Email

You can receive email notifications if Axon is configured to work with your organisation's email system. You can choose to either receive automated emails based on some events, or on a regular basis. If another Axon user shares a search with you, you are automatically informed of this by email.

You can choose to receive an email on a regular basis that tells them what is happening in your Axon account. You can manage these emails by selecting a frequency in the Activity Stream.

Axon sends the following information in the Activity Stream email:

- Role acceptances awaiting approval
- Pending workflow actions. Includes discussions that you are part of and you have not yet contributed to.
- A summary of changes that a user has made to an object where you are either the stakeholder or a follower. If you are part of a change request where you have been assigned a role, the Axon notification email will contain information depending on whether the role is included in the underlying workflow.

Managing Locks

You can lock an object to prevent other users from editing the object. You can manage locks from the toolbar.

If there is a lock on an object, Axon displays an orange padlock icon beside the **Edit** button. Hovering over this padlock will trigger a message with the name of the user who locked the object. An edit lock prevents more than one user from editing an object concurrently. This lock does not persist after the user has saved and closed the object. The user who applied the edit lock or an administrator can remove this type of lock.

Viewing Object Dashboards

View a dashboard for each object within a facet. Use the information in the dashboard to get a visual representation about the data quality rules, data stewardship, processes, and data privacy in Axon.

You can view object dashboard results for the following areas:

- Data Quality
- Stewardship
- Process
- Data Privacy

Each of these views is predefined by default and show data if the required information is available. You can use filters to change the views. Click the legends on each of the charts to change the display. After each change, Axon revises and reloads the dashboard.

Data Quality View

Open the **Dashboard** tab of an object to view data quality scores from the data quality rules that you have created.

The following image shows the **Dashboard** page:



1. Axon displays the overall score for each data quality rule type. The default data quality rule types are completeness, accuracy, consistency, validity, and timeliness. Displays scores based on the arithmetic average of the rules in the scope of your Unison search. Takes into consideration the most recently uploaded score for each rule, or the most recently measured value in Informatica Data Quality. Determines the chart color based on the average value of the respective thresholds.
2. Drop-down menu to select the dashboard view.
3. The number of rules by type. Filter scores based on types that you want to exclude.
4. The number of rules by criticality. Filter scores based on the criticality that you want to exclude.
5. The number of rules by target. Filter the scores based on the target threshold results.
6. The number of data quality rules that are measured and not measured.

Axon displays the following sections in the dashboard:

DQ Rules by Type

Displays the number of data quality rules based on the rule type. You can view information about the following rule types:

- Accuracy
- Timeliness
- Completeness
- Validity
- Consistency

Hover your mouse over the graph to see a breakdown of the rules by data quality rule type. Click a color in the legend below the graph to remove a rule type from the score chart. Axon redraws the dashboard to display the scores based on the remaining rule types.

DQ Rules by Criticality

Displays the results of the data quality rules by criticality. Click any of the colors in the legend below the graph to remove the rules that have the threshold value that you want to hide. For example, if you click the amber color to hide all the data quality rules that have a low criticality, Axon redraws the dashboard to display the scores based on the data quality rules that have medium and high criticality.

Hover your mouse over the graph to see the breakdown of rules that meet the criticality criteria.

DQ Rules against Target

Displays the number of rules for each rule type by target threshold values and represents the threshold results by color. Axon uses the following criteria to displays the colors:

1. Above target - displayed in green color.
2. Below threshold - displayed in amber color.
3. Below threshold - displayed in red color.

Hover your mouse over any of the rule types to see the number of rules that meet the measured threshold values.

DQ Rules Measured

Displays the count of the data quality rules that are measured or not measured against the default data quality rule types that are available in Axon. The orange bars display the total number of data quality rules for a particular rule type measured. The blue bars display the total number of data quality rules for a particular rule type that are not measured. Hover your mouse over the graph to see a breakdown of the data quality rules that are measured and not measured.

Stewardship View

Within an object, you can view a dashboard of the data stewardship status in the **Stewardship** view.

Axon displays the stewardship status in the following sections:

Roles per Role Type

Displays a graph of the types of roles. Hover your mouse over the graph to see a breakdown by role type. Click the colors in the legend below the graph to exclude role types.

People Per Org Unit

Displays a graph of the People per Org Unit. Hover your mouse over the graph to see a breakdown of People by Org Unit type. Click the colors in the legend below the graph to exclude departments from the Org Unit.

Role Acceptance

Displays a graph of the Role Acceptance requests that are pending.

Change Requests

Displays a pie-chart of Change Requests by request type. Hover your mouse over the graph to see a breakdown of the Change Requests. Click the colors in the legend below the pie-chart to exclude Change Requests that are Completed, Cancelled, Pending Start, and Running.

Change Request Creation

Displays a graph of the change requests created over a period of time. Click the colors in the legend below the graph to exclude different periods of time.

Change Request Update

Displays a graph of the change request updated over a period of time. Click the colors in the legend below the graph to exclude different periods of time.

Process View

Within an object, you can view a dashboard of the status of processes in the **Process** view.

Axon displays the status of Processes in the following sections:

Lifecycles

Displays a pie-chart of the Processes that are in production and that need to be replaced. Click the colors below the pie-chart to exclude a status.

Types

Displays a pie-chart of the Processes by type. Click the colors below the pie-chart to exclude one or more Process type.

Classification

Displays a pie-chart of the Processes by classification. Click the colors below the pie-chart to exclude one or more classification.

Automation

Displays a pie-chart of the Processes by automation. Click the colors below the pie-chart to exclude one or more automation type.

Viewing Data Privacy Metrics

If you have access to Secure@Source, you can view the data privacy metrics extracted from Secure@Source in the System and Policy facets of Axon. The data privacy metrics helps you determine whether your organization is compliant with statutory regulations, such as General Data Protection Regulation (GDPR) policy.

Axon displays data privacy metrics, such as risk score, risk cost, protection status, and sensitivity levels, sourced from Secure@Source on the Data Privacy dashboard. For example, you want to review if the current status of data privacy supports GDPR compliance. You can view the Data Privacy dashboard to identify the amount of sensitive data that is protected, risk costs, and the policy violations. Based on the current aggregate state of the privacy metrics, you can take necessary actions to identify and protect sensitive data.

In Secure@Source, data privacy metrics are measured for a data store. A data store is a repository object that connects to the data source that you want to analyze. You add data stores to scan jobs. The scan job connects to and identifies sensitive data in the data source.

You can link a security or classification policy from Secure@Source to an Axon policy. A security policy is a rule-based policy designed to detect violations. A security policy contains the severity level of a violation and a rule that defines the violation. Classification policies cater to specific data security standards, such as PCI, PHI, PII, that are available by default. A classification policy defines the rules that Secure@Source uses to identify sensitive data and classify a data store based on industry or organization data security standards.

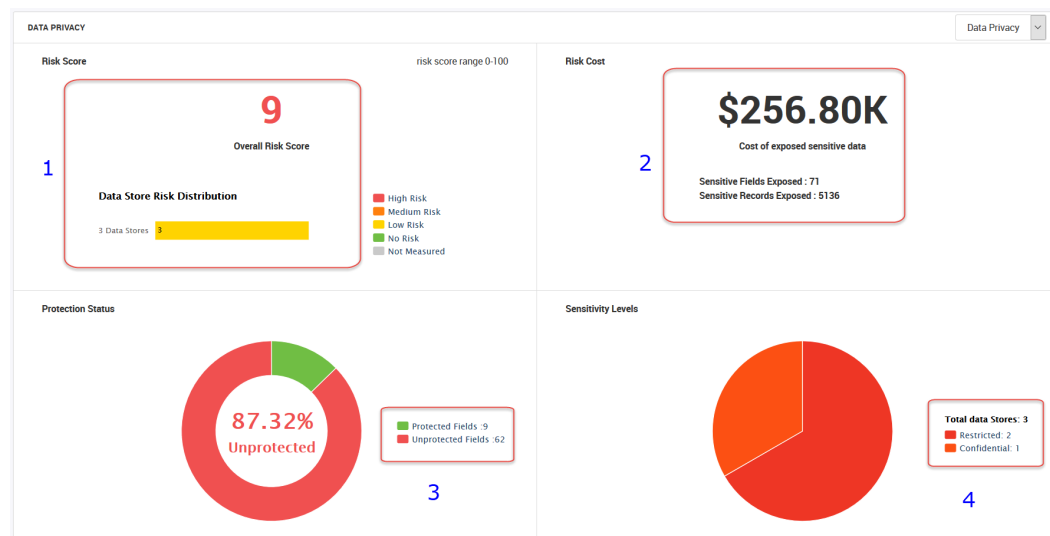
Axon displays the following data privacy metrics for system and classification policies:

- Risk score
- Risk cost
- Protection status
- Sensitivity levels

Axon displays the following data privacy metrics for security policies:

- Policy violations
- Severity level

The following image shows a sample data privacy dashboard for a system:



1. The overall risk score for the scanned data stores that are associated to a system. Axon displays a distribution chart with the total number of data stores and the level of risk based on the different color codes.
2. The total cost of exposed sensitive data. View the number of sensitive fields and records that are exposed.
3. The percentage of unprotected data. View the number of protected and unprotected sensitive fields.
4. The sensitivity levels of data in the data stores.

Risk Score

Displays a number that summarizes the overall risk score of the scanned data stores that are associated to a system or classification policy. The higher the number, the greater the risk to sensitive data. The risk score value ranges from 0-100. View the total number of data stores that are at risk along with data store

distribution chart based on the severity level of the risk. The data store risk chart shows the distribution of risk based on the following levels:

- High Risk
- Medium Risk
- Low Risk
- No Risk
- Not Measured

Risk Cost

Displays the cost that the business might incur if the sensitive data in the data store is exposed. The data risk cost of a data store is the product of the cost for each occurrence of sensitive data and the number of records of sensitive data. You can view the following details:

- The number of sensitive fields that are exposed
- The number of sensitive records that are exposed

Protection Status

Displays the percentage of unprotected sensitive data in the data store that is associated with a system or classification policy. A field is protected if a PowerCenter mapping includes a data masking transformation for the column. The Protection Status indicator shows the number of sensitive fields that are protected and unprotected.

Sensitivity Levels

The level of data sensitivity of a data store that is associated to a system or classification policy. You can view the following default sensitivity levels:

- Public
- Internal
- Confidential
- Restricted

The sensitivity level for a system contains a pie chart that includes distribution of data stores based on the sensitivity level. You can also view the total number of data stores.

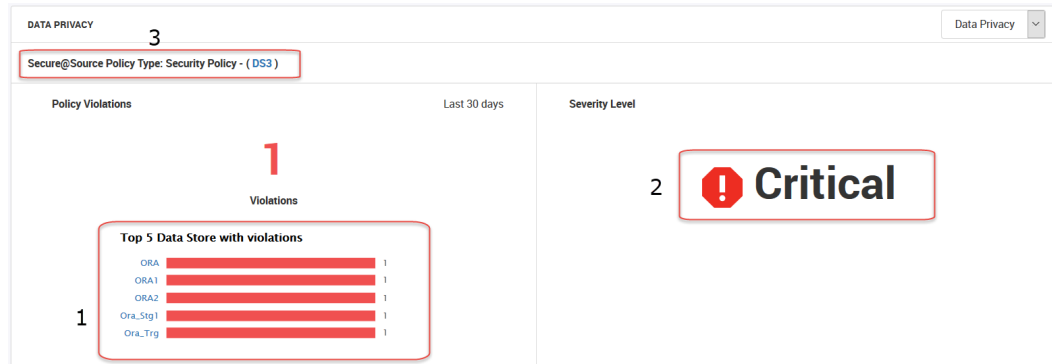
The sensitivity level for a classification policy shows only one sensitivity level. If a data store matches a classification policy, the scan job in Secure@Source updates the data store with the sensitivity level of the classification policy. When you click on the Secure@Source link to view the sensitivity level, you might find a different sensitivity level for the classification policy because Axon displays the aggregate sensitivity value at the data store level.

Policy Violations

Displays the total number of violations that Secure@Source detected for a security policy associated with an Axon business policy. Axon displays the total number of violations measured over the last 30 days. You can see the aggregate number of data stores associated with the violations for the security policy. You can also view the number of violations in each data store.

A security policy violation occurs when one or more properties in an anomaly, data store, or user activity event match the rule specified in a security policy. The count only includes the data stores to which you have access. To view more details about the security policy in Secure@Source, you can click the link that displays the associated security policy name on the dashboard.

The following image shows a sample data privacy dashboard for an Axon policy that is associated with a security policy:



1. The total number of security policy violations. Axon lists the top five data stores with the corresponding number of violations.
2. The severity level of the policy violation.
3. The Secure@Source link to the associated security policy.

Severity Level

Displays the severity level of violation of a security policy that is associated with the Axon policy. A violation can only have one severity level. The severity level can have one of the following values:

- Critical
- High
- Medium
- Low
- Informational

Viewing Data Privacy Dashboard

You can view the data privacy metrics extracted from Secure@Source in System and Policy facets.

1. Click an object from a System or Policy facet.
2. Click the **Dashboard** tab.
3. Select the **Data Privacy** view from the list.

The dashboard appears with the data privacy metrics.

Viewing Insight Maps

Axon can display Unison search results as an interactive map. Maps are a graphical representation of the relationships between objects across different facets. You can apply different overlays, exclude nodes and

group nodes to view more or less information on the map. Insight maps are not limited in scope to any particular facet or object type.

You can view the following types of maps in Axon:

System Lineage

Displays system objects and how information flows across them. The dotted lines between systems describe a system interface. The solid lines between systems describe the linking attributes.

Data Lineage

Displays data set objects and how information flows across them. Axon displays the Data Set Lineage view only when you have described Linking Attributes. Axon displays labels for both system names and the Data Set Name, with searchable data set reference number.

Multi-Node

Each node is an object type from a limited range of facets (system, process, project and their stakeholders). You can view the multi-node map with only the System and Stakeholder filters applied and for the Project and Processes facets. Axon displays connections between these objects in the map. You can modify the map by controlling the Information menu that appears upon mouseover.

When you click the information bar, you can add in objects that are connected to the current which are not in scope of the original map. This is limited to the 4 facets available in the filter, but allows you to expand the map to see a collection of connected objects.

Interpreting and Interacting with the Map

You can interact with an Insight map to obtain the information that you need. The colour of the node shows whether they are in scope of the active search.

The lines connecting items on the map represent connections between items. Clicking on any item that is connected to any other item highlights the inbound and outbound paths. A dotted line between objects means that one or more interfaces exist between two objects. A solid line means that a flow of data lineage is available described between data sets held in systems.

You can perform the following tasks on the map:

Highlight a Node

Click on a node and see the information flow. Axon highlights the lines to show information flowing in and out of an object. This works when you have created system interfaces or linking attribute relationships.

Moving Objects

Left click and drag an object to move it around the map. To move more than one object, draw a rectangle around the objects using a left click and highlight multiple items. For larger maps that exceed the viewable area, right click and drag the map canvas to move around.

Open the Information Menu

You can hover your cursor over an object to see the information menu. Some of the actions that you perform in the information menu will temporarily change the look of the map without refocusing the search in Unison Search.

You can perform the following tasks from the information menu:

- Go to object. Open the object in a new browser tab.
- Hide the object. Temporarily remove the item and the interface lines that connect it to other systems from the map.

- Focus object. Limit the map view to items directly connected to one object. An object in focus is highlighted in green color
- Hide upstream or Hide downstream. View information that flows into or out of a given system. Hide upstream will suppress the flow into the object and Hide downstream will suppress the flow from the object.

Insight Maps Palette

After you open an Insight Map, you can use the palette to change the way Axon displays the map. Click the - icon on the right hand side of the Axon map screen to hide the palette and the + icon to show the palette if it is hidden.

You can perform the following tasks from the Insight Map palette:

Change the Map Type

Select a map type from the drop-down list. Axon redraws the map based on the map type that you selected.

The following options are available from the drop-down list:

- System Lineage
- Data Set Lineage
- Multi Node Lineage

Change the Map Layout

You can change the direction of the lineage flow by changing the map layout. Select a layout from the drop-down list to change the map layout.

The following options are available from the drop-down list:

- Left to Right. Use this layout for small to medium sized maps.
- Top to Bottom. Use this layout to represent information flows that aggregate into a central point.
- Organic. Use this layout for larger maps or maps with no overriding direction in the information flow.

Change the Overlay

Axon can place additional information on the map in the form of an information box above each object by changing the overlay. Adding an overlay increases the space required on the screen to display the map. Overlays are therefore limited by default to show a maximum of 10 items in an overlay, with multiple pages to hold extra information. The grey box at the bottom of each overlay shows users how many pages of information each overlay contains.

The following data overlay types are available:

- Description
- Glossary
- Attributes
- Linking Attributes
- Data Quality

The following business overlay types are available:

- Stakeholders
- Processes

- Projects
- Policies

You can connect information in an overlay by using the following types of highlighting:

- Simple Highlighting. Click on an item in an Overlay, and it will turn dark blue. If the same item is relevant to other objects, it will be highlighted in a lighter blue.
- Advanced Highlighting. Some Overlays can show how the information of interest flows between objects by colouring the interface lines red. This is particularly useful for looking at Linking Attributes, where connected objects may have different names in connected systems and data sets.

Click **Clear Overlays** from the **Overlay** drop-down menu to remove any overlay that Axon displays on the map.

Apply Filters

Filters allow you to show hide objects or connections that are described based on certain characteristics. The filters available depend on the map type that you are using.

You can set the following types of filters:

- Links. Differentiate between Interface and Data Attribute links by selecting or removing the checkbox.
- System Classification. Include or exclude systems by selecting or removing the checkbox.
- Interface automation.

After Axon displays a map, you can perform tasks such as zooming in and out to change the map display. These actions do not change the information displayed in the map but change the way Axon displays the map.

You can perform the following additional tasks on a map that Axon displays:

- Zoom in to the map.
- Zoom out of the map.
- Redraw the map.
- Reset the map.
- Export the map.
- Use the map navigator to scroll and view the sections of a large map.
- View the map in a new full screen browser tab.

Viewing Local Maps

You can view a local map from one of the tabs after you open an object from Unison. Local maps display the immediate relationships of the object that you have currently opened.

The following table describes the different Axon facets that have local maps and how to view the map:

Facet	Section	Description
Data Set	Relationship	Displays a graphical representation of the Inbound and Outbound relationships described in the two tables immediately above the map. The map is therefore scoped to show only these connections, although it will show the full lineage relevant the active data sets' attributes.
System	Interfaces	System lineage map relevant to the active system. Shows immediate interface connections, and full linking attribute lineage relevant to the attributes held in the active system.
System	Data Map sub-tab under the Data tab	Data Lineage map scoped to the lineage of Data Sets and Attributes belonging to the active system
Glossary	Relationships under the Relationships tab	Glossary, System and Data Set Lineage maps scoped to the items connected to the active glossary object.
Glossary	Data Map sub-tab under the Data Tab	Full set of locally scoped Insight Maps focused showing lineage on objects linked to the active glossary object.
DQ Rule	Relationships sub-tab under the Standardised DQ Rules	System and Data Set Lineage maps.
Process	Context map in the Summary tab and Process map in the Components tab	A context map shows the dependencies, such as predecessors and successors, for a process. A process map shows the process flow between the immediate children of a process object.
Capability	Map under the Relationship tab	Capability lineage map is a feature in beta. It currently shows all capability children.
Project	Data Map sub-tab under the Data Tab	System lineage map scoped to any systems linked to the active project.

Viewing Process Maps

You can view context and process maps in a Process object. A context map within a process provides a visual representation of the process dependencies. A process map within a process provides a visual representation of the process flow.

Within a map, you can see the following types of steps:

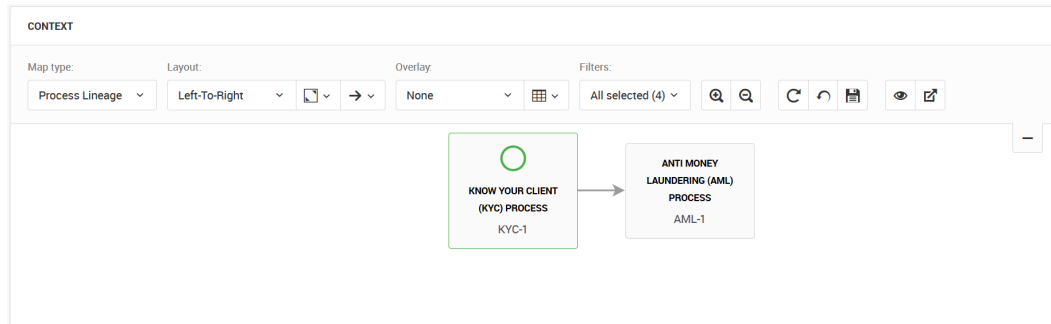
- Start. A green circle indicates the start step for a process.
- End. A blue circle indicates the end step for a process.
- Control. An orange decision box indicates the decision control step for a process.

Context Maps

A context map shows the dependencies, such as predecessors and successors, for a process. A predecessor for a process indicates the steps that you need to follow before the process. A successor for a process indicates the steps that you need to follow after the process. View the context map from the **Summary** tab. You can edit and add predecessors for a process. A context map provides a complete view of the dependencies for a process.

For example, you run a Know Your Client (KYC) compliance process. After completing the KYC process, you need to run the Anti-Money Laundering (AML) process. The AML process is a dependency for the KYC process.

The following image shows a sample context map for a KYC compliance process:



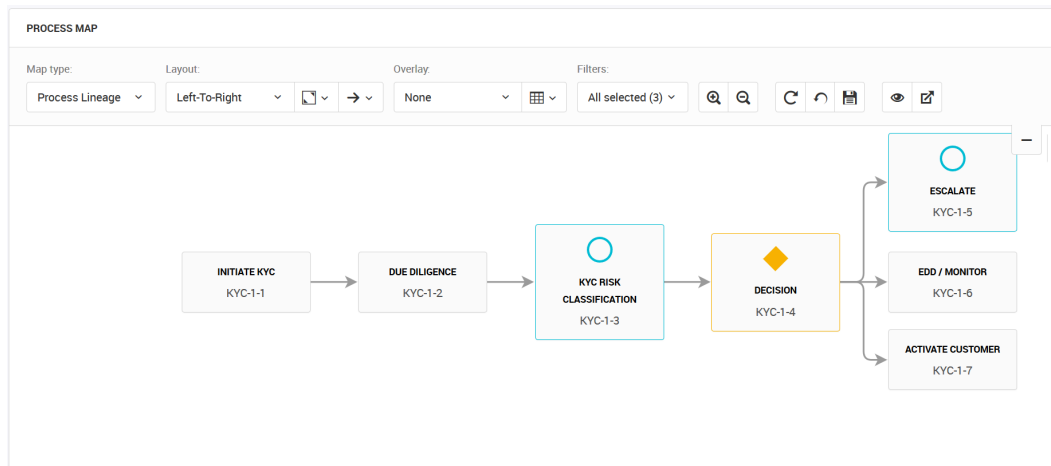
You can go to each object in the map to view further details. If you select a predecessor object, you can view the process object and all the successor objects. If you choose to view a successor object, you can see all the predecessor and process objects.

Process Maps

A process map shows the process flow between the immediate children of a process object. View the process map from the **Components** tab. A process map shows the flow of a process.

For example, you want to view the flow of a KYC compliance process. You need to initiate the KYC process, analyze the risks, and decide whether to escalate, monitor, or activate the customer account.

The following image shows a sample process map for a KYC compliance process:



You can go to each object in the map to view details of each step.

Viewing Data Quality Reports

Axon displays data quality reports based on data quality rules that you configure. Axon supports local data quality rules and standard data quality rules. Local data quality rules are assigned against attributes upon which scores are recorded. Standard data quality rules are assigned at the glossary level and give guidance on how attributes linked to a glossary term should be measured.

Axon does not replace your existing data quality measuring and profiling systems, but it can take inputs from them. You can do this by a technical linking of systems, or uploading extracts to Axon as a bulk upload.

You can view dashboards when you open certain object types. The **Summary** tab of such objects display the dashboard. Local dashboards show a roll up of data quality scores linked to the object.

CHAPTER 3

Create

This chapter includes the following topics:

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- [Clone Data Set, 57](#)
- [Create Change Requests, 58](#)
- [Create Workflows, 59](#)
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Create Objects Overview

You can create several types of objects in Axon. Objects are data assets that belong to one of the various areas of data governance, such as Regulatory area, Organizational area, Business and Change area, and Data and Technology area.

You must verify the following prerequisites before you create an object:

- The Create New Item permission is assigned to your role or user. Contact your Axon administrator for this permission.
- Some objects require that other associated objects are already present in Axon. For example, to create a data set, its associated system must already be present in Axon.

Consider the following guidelines when you create an object:

- When you create an object, update the **Stakeholder** tab with the appropriate stakeholder information.
- To create a large number of items, use the bulk upload feature.

Creating an Object

You can create objects in Axon and add properties to it.

1. Log in to Axon.
2. In the Axon toolbar, click the **Create** menu, move your mouse over a governance area, and click on the object name that you want to create.

The **Summary** tab appears where you can enter the basic properties of the object..

3. In the **Definition** and **Classifications** section, enter the properties of the object . Click **Save** to save the object and add additional properties. Click **Save and Close** to finish creating the object.

If you clicked **Save**, the following additional tabs appear:

- **Relationships**
- **Stakeholders**
- **Impact**
- **Workflow**

4. Enter the associated properties of the object in the additional tabs. Click **Close**.

Capability Properties

A capability refers to a list of activities, deliverables or skills that is available in your organization. A capability might cross departmental boundaries. Axon users can see the resources that are brought together to deliver a capability in a particular context.

Definition

The following table describes the properties for creating a capability:

Field	Description
Primary Name	Name of the capability.
Ref.	ID for the capability. If you leave this field empty, Axon assigns a new reference automatically.
Description	Description of the capability.
Parent	Parent of the capability if the capability belongs to a hierarchy.

Classifications

The following table describes the properties for classifying a capability:

Field	Description
Axon Status	Status of the capability asset in Axon.
Axon Viewing	Whether the capability should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.

Field	Description
Lifecycle	Stage of the capability in the approval lifecycle.
Classification	Classification of the capability that best describes its purpose, for example, Regulatory Capability. The options you see here are predefined in your Axon installation.
Capability Type	Type of capability that best describes the object.

Data Set Properties

A data set refers to a data object that you can create and then define its attributes. In Unison search, Data Sets and Attributes are displayed as separate facets. However, the attributes of a data object exist only within the context of a data set. The items in the Attributes facet represent a different view of the items in the Data Sets facet.

Definition

The following table describes the properties for creating a data set:

Field	Description
Name	Name of the data set. You can create several data sets with the same name, if they belong to different systems.
System	System that the data set belongs to.
Definition	Description of the data set.
Glossary	Glossary that the data set is associated with.
Usage	Additional information about the data set.

Classifications

The following table describes the properties for classifying a data set:

Field	Description
Axon Status	Status of the data set asset in Axon.
Type	Type of the data set. The options you see here are predefined in your Axon installation.
Axon Viewing	Whether the data set should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.
Lifecycle	Stage of the data set in the governance lifecycle.

Attribute Values

The following table describes the properties for the values of a data set attribute:

Field	Description
Value Update Frequency	The frequency at which you plan to update the list of values. Select one of the following frequencies: <ul style="list-style-type: none">- Daily- Weekly- Monthly- Quarterly- Yearly- Ad-hoc- Other- Unknown
Update Frequency Comments	Notes or comments about the frequency at which you plan to update the list of values
Availability	The method by which you plan to make the list of values available to other applications. Select one of the following methods: <ul style="list-style-type: none">- Other applications can retrieve and display the values one object at a time.- Other applications can retrieve the values using batch operation.- The IT system administrator for other applications can retrieve the values using batch operation.- The values are available for data warehousing.
Availability Comments	Notes or comments about the availability of the list of values.
Values in Axon	Select whether the value is part of a complete list of values or a sample representation of values.

Geography Properties

Geography refers to a region or country in which you want to enforce a regulation. For example, you create a regulation that applies to only the offices in the United States. You can specify the geography when you edit a Regulation or Regulator facet.

Definition

The following table describes the properties that you can provide to create a geography:

Field	Description
Name	Name of the geographical region or country in which you want to enforce a regulation.
Description	Description of the geographical region.

Glossary Properties

The Glossary captures an organization's agreed definitions for data, activities, business terms, and other objects. A set of well-described glossary terms allows users from different business functions to link their data and activities to definitions that everyone within the organization can understand. In a glossary, you can

organize terms in logical hierarchies. A good glossary unifies the meanings of terms for use by a wide group of people, and facilitates search and addition of terms. After you create a glossary object, you can edit and configure relationships between glossaries.

Definition

The following table describes the properties that you can enter to create a glossary:

Field	Description
Name	Name of the glossary.
Description	Description of the glossary.
Format Type	Format in which the glossary is expressed.
Alias Names	Alternate names for the glossary. Enter synonyms of the glossary that is commonly used in your organization.
Format Description	Description of the glossary format.
LDM Reference	Place of the glossary in a Logical Data Model.
Business Logic	Business context in which the glossary is used.
Examples	Contextual examples of the business logic.
Parent	Parent of the glossary in the glossary hierarchy. The options you see here are created by your Data Steward.

Classifications

The following table describes the properties that you can enter to classify a glossary:

Field	Description
Axon Status	Status of the glossary in Axon.
Lifecycle	Stage of the glossary in the approval lifecycle.
Axon Viewing	Whether the glossary should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.
Type	Whether the glossary refers to an entity, a domain, or a business term.
Security Classification	Security classification of the glossary. The options you see here are predefined in your Axon installation.

Glossary Relationships

To configure relationships between glossaries, click the **Relationships** tab, and click **Edit**.

The following table describes the relationships that you can configure when you edit a glossary:

Relationship	Description
Is Related to	Defines how a glossary is related to another glossary. Use this type of relationship to describe the relationships, other than parent-child relationship, between two glossaries.
Is Identified by	Defines identity of a glossary. For example, an Employee is identified by the Employee ID and a Person is identified by the SSN.
Is Specialism of	Defines how you can categorize a glossary. For example, an IT Employee is specialism of Employees.
Is Described by	Defines how a glossary is described by another glossary. For example, a Date Format is described by the Region and Tax is described by the Country.
Is Classified by	Defines the classification for a glossary. For example, a Country is classified by the Region.
Is Made up of	Defines how you can calculate or derive a glossary from other glossaries. For example, Revenue is made up of the License Sale and Subscription Sale.

Organizational Unit Properties

An organizational unit describes the complex hierarchical structure of an organization. You must create an org unit before you create the People object. You must have an Admin profile to create an org unit. If your organization uses Single Sign-On authentication, you can link the Org Unit facet to an HR view.

Definition

The following table describes the properties that you need to specify when you create an org unit:

Field	Description
Primary Name	Name of the local department, team, or unit.
Ref.	Reference identifier for the org unit. The reference ID must be a string data type. If you enter a number, you must format the column to Text type. Otherwise, when you bulk upload org unit assets using a template, Microsoft Excel alters the reference ID by deleting trailing zeros.
Description	Relevant description about the org unit.
Parent	Parent of the org unit. The parent record must exist in Axon before you create an org unit asset.
Axon Status	Status of the org unit object in Axon.

Policy Properties

A policy is a statement of a plan or principles that address the needs of a particular situation. For example, to meet a regulatory requirement, a policy describes the agreed manner in which the requirement is met. In Axon, you can see how policies interact with other objects and activities.

Definition

The following table describes the properties for creating a policy:

Field	Description
Name	Name of the policy. Enter a name that users can recognize easily.
Ref.	ID for the policy. If you leave this field empty, Axon assigns a new reference automatically.
Description	Description of the policy.
Type	Category that best describes the policy. The options you see here are predefined in your Axon installation.
Internal	Whether the policy is internal or external.
URL	Link to another page where the policy is mentioned in detail.
Parent	Parent of the policy if the policy belongs to a hierarchy.
Security or Classification Policy Reference	The name of the Secure@Source policy that you want to link to the Axon policy. You can select a security or classification policy.

Classifications

The following table describes the properties for classifying a policy:

Field	Description
Effective Date	Date from which the policy is effective. When you bulk upload policy assets from a Microsoft Excel file, sometimes, Microsoft Excel converts the date into number of days. To prevent this, enter a single quote before the date. For example, enter March 20, 2017 as '20-03-2017 in Microsoft Excel.
End Date	Date after which the policy ceases to be effective. When you bulk upload policy assets from a Microsoft Excel file, sometimes, Microsoft Excel converts the date into number of days. To prevent this, enter a single quote before the date. For example, enter March 20, 2017 as '20-03-2017 in Microsoft Excel.
Axon Status	Status of the policy asset in Axon.
Lifecycle	Stage of the policy in the approval lifecycle.
Axon Viewing	Whether the policy should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.

Process Properties

A process is a series of actions performed in a logical order to achieve a particular task or objective. Axon is not a process mapping tool, but Informatica recommends users to inventorize the key aspects of each process in Axon. Using Axon, you can link processes to their dependencies and view how data and business tasks interact with each other.

Definition

The following table describes the properties for creating a process:

Field	Description
Primary Name	Name of the process.
Ref.	ID for the process. If you leave this field empty, Axon assigns a new reference automatically.
Description	Description of the process.
Parent	Parent process of the process that you create. After you create a process, you can view the parent name of the process when you hover over the process name regardless of the tab that you are in.
Input Description	Description of relevant inputs to the process.
Output Description	Description of relevant outputs from the process.
Class	Classification of the process. The options you see here are predefined in your Axon installation.
Automation	Level of automation. <ul style="list-style-type: none">- The Manual option means that the process requires human intervention at every stage of the workflow.- The Partially Automated option means that the process requires human intervention at some, but not all, stages of the workflow.- The Fully Automated option means that the process requires no human intervention at any stage of the workflow.
Permissions	Default permission granted to the user for working with the process.
Duration	The time duration for the process that you create. Choose hours or days as the unit of time. If you want to enter the unit of time in weeks or week days, you can configure the Process Duration Type property from Meta-Model Administration Dropdown Configurations in the Admin Panel. You can view the specified process duration in a process or context map.

Classifications

The following table describes the properties for classifying a process:

Field	Description
Axon Status	Status of the process asset in Axon.
Lifecycle	Stage of the process in the approval lifecycle.
Type	Whether you are creating a complete process, a step within a process, or a control within a process.

Field	Description
Step Type	Whether you are creating the starting step of a process, the ending step of a process, or a common step across the process.
Axon Viewing	Whether the process should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.

Product Properties

A product captures the core product segmentation of an organization and describes the context of the products by connecting them to other facets.

The following table describes the properties that you can provide to create a product:

Field	Description
Name	Short name of the product. Enter a name that users can recognize easily.
Description	Description of the product.
Long Name	Full name of the product.
Parent	Parent name of the product that you want to create.

Classifications

The following table describes the properties that you can enter to classify a product:

Field	Description
Axon Status	Status of the product asset in Axon.
Axon Viewing	Whether the product should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.
Lifecycle	Stage of the product in the production lifecycle. The stages are In Production and Being Considered .

Project Properties

A project is a collection of activities that are planned and organized in order to achieve a particular set of objectives. Projects are often complex, and are managed using project management tools. In Axon, you can view how projects interact with and are dependent on other functions within your organization.

Definition

The following table describes the properties for creating a project:

Field	Description
Name	Name of the project. Enter a name that users can recognize easily.
Ref.	ID for the project. If you leave this field empty, Axon assigns a new reference automatically.
Description	Description of the project.
Type	Whether you are creating a program, a project within a program, a workstream within a project, or a workpackage within a project. The options you see here are predefined in your Axon installation.
Parent	Parent project of the project you are creating.
Classification	Purpose of the project.

Classifications

The following table describes the properties for classifying a project:

Field	Description
Axon Status	Status of the project asset in Axon.
Lifecycle	Stage of the project in the project management lifecycle.
Axon Viewing	Whether the project should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.
RAG	Status of the project in the project management lifecycle. Select Red, Amber or Green.
Start Date	Start date of the project. When you bulk upload a project assets from a Microsoft Excel file, sometimes, Microsoft Excel converts the date into number of days. To prevent this, enter a single quote before the date. For example, enter March 20, 2017 as '20-03-2017 in Microsoft Excel.
End Date	End date of the project. When you bulk upload a project assets from a Microsoft Excel file, sometimes, Microsoft Excel converts the date into number of days. To prevent this, enter a single quote before the date. For example, enter March 20, 2017 as '20-03-2017 in Microsoft Excel.

Regulation Properties

A regulation is a directive or rule that you employ to manage an activity, system, or organization. For example, the General Data Protection Regulation (GDPR) policy helps you determine whether your

organization is compliant with statutory regulations on data privacy and protection. A regulation holds the interpretation of regulatory documentation for an organization. In Axon, you can link external regulation to internal policies to ensure compliance.

Definition

The following table describes the properties that you can provide to create a regulation:

Field	Description
Long Name	Full name of the regulation, for example, General Data Protection Regulation.
Ref	ID for the regulation. If you leave this field empty, Axon assigns a reference identifier automatically.
Description	Description of the regulation.
Short Name	Short name of the regulation. The most commonly used name or an acronym for the regulation, such as GDPR. Enter a name that users can recognize easily.
Legal Advice	A description of the legal advice.
Legal Advice Type	The type of legal advice. Select one of the following legal advice types: <ul style="list-style-type: none"> - Comment - Guideline - Legal Requirement
Additional Info	Any additional information that provides a context to the regulation.
Parent	Parent object of the regulation.

Classifications

The following table describes the properties that you can provide to classify a regulation:

Field	Description
Compliance Level	The current state of the response of the organization to the regulation. Select one of the following compliance levels: <ul style="list-style-type: none"> - Unknown - Fully Compliant - Compliant with Exceptions - Materially Not Compliant
Maturity	The level of maturity in understanding and interpreting the regulation. Select one of the following maturity stages: <ul style="list-style-type: none"> - Initial Draft - Open for Comments - Comments Incorporated - Finalizing - Finalized
Probability	The extent to which a regulation is probable. Select Confirmed .

Field	Description
Impact Rating	The level of impact of the regulation on the organization. Select one of the following impact ratings: <ul style="list-style-type: none"> - None - Unknown - Low - Medium - High
Status	Status of the regulation in Axon. Select one of the following statuses: <ul style="list-style-type: none"> - Active - Obsolete - Deleted
Stage	The stage of the organization when a regulation is created or updated. Select one of the following stages: <ul style="list-style-type: none"> - Interpretation - Impact Assessment - Impact Approval - Completed
Access Control	Whether or not the regulation needs to be available to public. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before you configure the field to "Non-Public."
Publication Date	The date of the original publication of the regulation. If a regulation object is manually created and the object is a child of another regulation object, the publication date automatically inherits the value from the parent.
Compliance Date	The date by when you want to enforce the regulation, for example, 25th May 2018. If a regulation object is manually created and is the child of another regulation object, the compliance date automatically inherits the value from the parent.
Comments Date	The date by when you want the stakeholders of an organization to provide comments or opinions on the draft regulation.
Finalisation Date	The date by when you want the stakeholders to submit comments and finalize the regulation.

Regulator Properties

A regulator is a person who applies or enforces the regulation. One regulator can start a regulation and other regulators can adopt the regulation. For example, the European Union (EU) is the regulator of GDPR.

Definition

The following table describes the properties that you can provide to create a regulator:

Field	Description
Name	Full name of the regulator.
Short Name	Short name of the regulator. The most commonly used name or an acronym for the regulator. Enter a name that users can recognize easily.
Description	Description of the regulator.

Regulatory Theme Properties

A regulatory theme classifies a regulation based on the type of data. For example, you can create a regulatory theme to know what is the Credit Exposure limit for your organization or to protect sensitive, personal data of employees.

Definition

The following table describes the properties that you can provide to create a regulatory theme:

Field	Description
Name	Full name of the regulatory theme.
Description	Description of the regulatory theme.
Ref	ID for the regulatory theme.
Short Name	Short name of the regulatory theme. The most commonly used name or an acronym for the regulatory theme. Enter a name that users can recognize easily.
Parent	Parent object of the regulatory theme.

Classification

The following table describes the property that you can select to classify a regulatory theme:

Field	Description
Axon Status	Status of the regulatory theme in Axon. Select one of the following statuses: <ul style="list-style-type: none">- Active- Inactive- Pending Review- Obsolete- Deleted

System Interface Properties

System interfaces facilitate the flow of information between systems and data sets. These interfaces might be technical assets that are supplied by your IT department. These interfaces might also be manual activities that you create to fully understand the flow of data within an organization. When you create a system interface in Axon, you create a dotted line between two objects in a system lineage map. You can use system interfaces to explain data lineage by looking at the attributes that link two objects.

Definition

The following table describes the properties for creating a system interface:

Field	Description
Name	Name of the system interface. You can create several interfaces between the same systems. Duplicate names are allowed, but Informatica recommends that you enter a name that is descriptive and unique.
Ref.	ID for the system interface. If you leave this field empty, Axon assigns a new reference automatically.
Source System	System or data set from which the information flows out.
Target System	System or data set to which the information flows in.
Description	Description of the system interface.
Synchronization Control	Description of the rules that control the synchronization of information between the two connected interfaces.

Classifications

The following table describes the properties for classifying a system interface:

Field	Description
Axon Status	Status of the system interface asset in Axon.
Axon Viewing	Whether the system interface should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.
Lifecycle	Stage of the system interface in the production lifecycle.
Automation	Level of automation.
Frequency	Frequency at which data flows between the source and target system.
Asset ID	ID of the asset.
Transfer Method	Protocol or medium used to move information between the source and target system.

Field	Description
Transfer Format	Format or file type used to flow information between the source and target system.
Interface Classification	Classification of the system interface that best describes its purpose, for example, Migration. The options you see here are predefined in your Axon installation.

System Properties

A system is a container that holds one or more collections of data assets that are useful to your organization. The definition of a system is broader than only the software applications that are supplied by your IT department. A system refers to business categories and functions that retrieve data from their sources and use them. In Axon, data assets, such as documents and end-user computing applications, are often described as systems.

Definition

The following table describes the properties for creating a system:

Field	Description
Short Name	Short name of the system. Enter a name that users can recognize easily.
Description	Description of the system.
Type	Whether the system is a software application or one of several file types. You also need to specify whether the system is hosted internally inside your organization or externally outside your organization.
Long Name	Full name or proper name of the system.
URL	Link to another page where related information is mentioned.
Parent	Parent process of the system that you create.

Classifications

The following table describes the properties for classifying a system:

Field	Description
Axon Status	Status of the system asset in Axon.
Lifecycle	Stage of the system in the production lifecycle.
Axon Viewing	Whether the system should be available for public viewing or not. Axon is meant for public use within your organization. Contact Informatica Global Customer Support before setting this field as Non-Public.

Field	Description
CIA Rating	<p>Confidentiality, Integrity and Availability (CIA) rating of the system.</p> <p>This rating indicates the security assessment of your system.</p> <ul style="list-style-type: none"> - 1 indicates weak security (less secure). - 2 indicates average security (moderately secure). - 3 indicates strong security (most secure). <p>Each of the CIA elements is rated from 1 to 3. The value you select here is a composite rating of all three elements. For example, a rating of 213 means that:</p> <ul style="list-style-type: none"> - Confidentiality is rated at 2 (moderately secure). - Integrity is rated at 1 (less secure). - Availability is rated at 2 (most secure). <p>Confidentiality, Integrity and Availability are crucial elements of your system's security.</p> <ul style="list-style-type: none"> - Confidentiality: The system's ability to show the right information to the right users who have the right credentials. - Integrity: The system's ability to ensure that the information shown to the users have not been compromised. - Availability: The system's ability to show the right information to the right users at the right time.
Asset ID	ID for the system.
Classification	Classification of the system that best describes its function, for example, Sales Reporting. The options you see here are predefined in your Axon installation.

Editing an Object

You can edit the properties of the objects in Axon. You must have the edit permission to edit an object.

1. Log in to Axon.
2. Click a facet to edit an object.
3. Click the object that you want to edit.
The **Summary** tab appears where you can enter the basic properties of the object.
4. Click **Edit > Edit Item**.
5. In the **Definition** and **Classifications** section, edit the properties that you want to change for the object.
6. To save and finish the changes, click **Save and Close**.

Clone Data Set

In an organization, you can come across multiple repositories that contain similar data sets. The process of creating data sets and attributes for each system is time-consuming, and most of the data sets and attributes might be similar. To reduce the time and effort, you can clone a data set that contains all the attributes and associate the data set with different systems. You can clone a data set to quickly reuse the data set attributes in different systems instead of creating the attributes again.

You might see a duplication of data across systems or across multiple versions of a system running in different parts of an organization. For example, if you want to run five instances of the same system but in different departments of your organization, you can clone the data set that contains all the attributes.

When you clone a data set, Axon creates and saves a copy of the data set. Axon replicates data to the **Summary** and **Attributes** tabs. You can add details in other tabs, such as Stakeholders and Impact, that are not cloned.

After you clone a data set, Axon appends the word (*clone*) to the data set name. For example, if the data set name is KYC Data, Axon creates a clone of the data set with the name "KYC Data (clone)". You can choose to use the same name or provide a unique name for the cloned data set.

Cloning a Data Set

You can clone a data set along with the attributes in Axon. You can clone one data set at a time.

1. Open a data set that you want to clone.
2. Click **Edit > Clone Data Set**.
The **Clone Data Set** dialog box appears and displays a confirmation message.
3. To clone the data set, click **Continue**.

Axon replicates data in the Summary and Attributes tabs. By default, Axon appends the word (*clone*) to the data set name.

4. Optionally, edit the name of the data set.
5. Optionally, update the fields in the remaining tabs that are not cloned.
6. Click **Save and Close**.

Create Change Requests

Create a change request to facilitate communication and discussion between the object stakeholders and the wider Axon community.

Raise a change request to provide a controlled and audited change approval process. Assign a workflow to the change request, and run the workflow to activate the change request. The types of change requests that you can create depend on the configuration of each instance of Axon and the configured workflows. Any user that logs in to Axon can raise a change request.

You can find or track a change request in the following locations:

- Unison Search. Change Requests have their own facet. Each change request is linked to the object that they belong to.
- Object View. View a change request in the **Change** tab of an object.
- My Account. Object stakeholders that are a part of change request workflow can find a list in the **My Account | Change Request** view.

Creating a Change Request

Create a change request for objects in Axon to update, enhance, or request information for an item. You must configure at least one workflow to activate a change request.

1. Click the object for which you want to raise a change request.
2. In the **Change** tab of the object, click the **Change Request** tab.
3. Click **Edit > Raise Change Request**.
The **New Change Request** page appears.
4. Configure the following properties to define a change request:

Field	Description
Title	Provide a short, meaningful title for the change request.
Type	Select the option that best describes the type of change request. You can either request for a change or request for information.
Summary	Provide a full description to explain why you want to raise the change request. The summary must contain enough information for stakeholders to assess the change request. A change request might be rejected if the details are not sufficient.
Parent	Select a parent name if the change request is part of a collection of related requests. You can associate the change request as a child of the parent change request.

5. Configure the following properties to classify a change request:

Field	Description
Severity	Select the severity of the change request. You can select a low, medium, or high severity.
Urgency	Select the level of urgency for the change request. Select low, medium, or high.
Estimated Benefit	Enter the amount of estimated benefit after you make the change. Expressed in GBP.
Estimated Cost	Enter the amount of the estimated cost to make the change. Expressed in GBP.

6. Click **Save and Close**.

You can view the Summary, Relationships, Stakeholders, and History tabs of the change request that you created.

Create Workflows

Workflows are predetermined steps that a change request must follow to ensure that the right people have the opportunity to provide input, challenge, and approve matters related to the objects that they change.

Axon includes a Business Process Model and Notation (BPMN) 2.0 workflow component to support data governance and change control efforts.

To create a workflow, leverage the different roles that you can assign to items in each facet. You can assign each workflow step to a role for assessment. The workflows available for a change request might vary depending on the facets.

You can create default and custom workflows in Axon. A custom workflow is a workflow that you can configure for each object within a facet. A default workflow is a workflow that you configure for a facet, and the workflow applies to all the objects in the facet.

For more information on default workflows, refer the following topics:

- [“Default Workflows” on page 82](#)
- [“Create a Default Workflow” on page 83](#)

Custom Workflows

Create and use custom workflows for an object within a facet.

You can create additional workflows for an object. If you want an object to follow one or more specific workflows, create a custom workflow for the object. For example, you can create a custom workflow that applies to a specific glossary item. A stakeholder with edit permissions for an object can create and manage custom workflows.

Creating a Custom Workflow

Create a custom workflow for an object in a facet. A stakeholder with edit permissions can create a custom workflow.

1. Click the object for which you want to create a custom workflow.
2. Click **Edit**.
The object opens in the edit mode.
3. Click the **Workflow** tab.
4. Choose to add a new workflow.
5. Enter a name for the workflow.
The name must contain a minimum of six characters.
6. Provide a description for the workflow.
Axon creates a canvas with many swimlanes based on the roles that are defined for the facet.
7. In **Workflow Diagram** section, create a workflow diagram on the canvas. Use the **Toolbar** to add objects and connect them. Use the **Properties** panel to specify additional properties for the objects.
8. Click **Save**.

Assigning and Running a Workflow

After you create a change request, you must assign a workflow to the change request. To activate the change request, you must run the workflow. You can choose a default or custom workflow.

1. Click the object in which you created a change request.
2. In the **Change | Change Requests** view, click the change request for which you want to run the workflow.
Before you open the change request, you can see that the change request is in the **Pending Start** state.
3. In the **Summary** tab, select a workflow from the list.

You can view the list of custom and default workflows that are applicable for the object.

4. To run the workflow, click **Start**.

Axon displays a message that the workflow is initiated. The stakeholder can add comments and complete the tasks based on the tasks specified for different roles in the workflow.

Workflows Discussion

When you run a workflow, Axon displays a notification to the stakeholders about the change request based on the tasks that they need to perform.

A stakeholder can review and take necessary actions for the change request. After you start the workflow, the workflow diagram shows the active task in green color.

The **Discussion** section of the workflow contains an audit trail of all the steps for which actions are taken or discussions are held. For example, you can see the task name, status, description, and due date for a user task. You can use the @ special character to address the user in a discussion. When a user is assigned to perform a task, Axon invites the user to post the results and shows the relevant actions that the user needs to perform to complete the task. If a user task is followed by a gateway, the user has an option to capture the decision made as part of the user task.

After all the responsible stakeholders complete the tasks, the designated stakeholder can close the change request.

Stuck Workflow

When a change request workflow is stuck, an Admin user or an object stakeholder with edit permissions can help progress the workflow.

Stuck workflow occurs due to the following reasons:

- The responsible user might not be available to complete the action in the active workflow step.
- A required stakeholder role might be vacant during the life of the change request.

To allow the progress of a workflow, you can add a user to the required role as a delegate of an existing role if the role is vacant. Allow the user take the appropriate action, and approve the step when complete. Then, remove the user from the role for the task. You must add an entry to the **Discussion** section of the Change Request to record the actions that you take. You can also view the updates to the change request from the **History** tab of the Change Request.

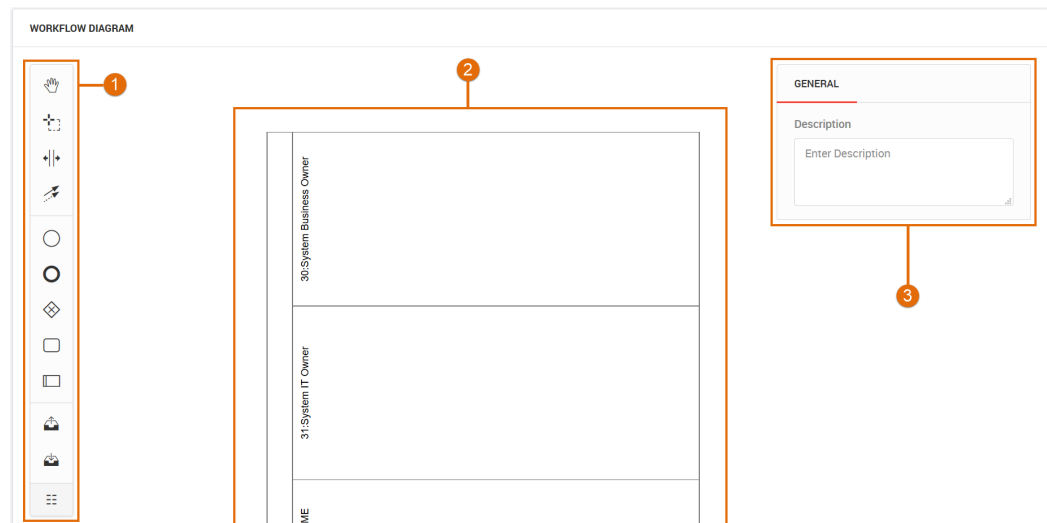
Note: The workflow can get stuck only during the progress of a workflow. If a user role is vacant, you cannot assign the workflow to a Change Request object .

Create a Workflow Diagram

Axon implements an open source workflow engine, Camunda, which provides a visual editor to create and run a workflow from a browser.

When you provide a name and description for a new workflow, Axon creates a canvas to create a workflow diagram. The Workflow Diagram section has three components: a toolbar on the left, a canvas in the center, and a properties panel on the right.

The following image shows the different sections of a workflow diagram:



1. Toolbar
2. Canvas
3. Properties

Toolbar

Use the toolbar to create a workflow diagram. The toolbar has three sections. The top section contains tools to select the items, resize the canvas, and connect the items. The middle section lists the building blocks of the workflow. You can select the items and drag to the canvas to create the workflow. Use the tools in the bottom section to show or hide the toolbar.

The following table describes the different tools that you can use to create a workflow diagram:

Tool Name	Description
Hand	Use the hand tool to select an item.
Lasso	Use the lasso tool to select a block on the swimlane.
Create/ Remove Space	Use the create/ remove tool to increase or decrease the canvas size.
Global Connect	Use the global connect tool to connect the items in a workflow.
Create StartEvent	Use the Create StartEvent tool to start a workflow event. You can decide the role that can start the event.
Create EndEvent	Use the Create EndEvent tool to end a workflow event. You can decide the role that can end the event.
Create ExclusiveGateway	Use the Create ExclusiveGateway tool to create decision boxes that can have two results. For example, a validate request can have two values: accept and reject. A gateway and the preceding user task must be close to one another in the same swimlane because they both are a logical unit and must be performed by the same user.

Tool Name	Description
Create UserTask	Use the Create UserTask tool to create tasks that a user can perform. You must enter a name and due date for the user task. The description is optional. You can create user tasks such as validate request, capture impact assessment, confirm feasibility, and approve request.
Create Pool/ Participant	Use the Create Pool/ Participant tool to add a swimlane for a user role.
Upload BPMN	Use the Upload BPMN tool to upload a workflow diagram to the canvas. This tool presently is not in use.
Download BPMN	Use the Download BPMN tool to download a workflow diagram from the canvas. This tool presently is not in use.
Hide/ Show	Use the Hide/ Show tool to hide or show the toolbar.

Canvas

The canvas provides a visual representation of the workflow. When you create a custom or default workflow, Axon automatically creates an empty canvas with swimlanes for each role that is defined for a facet. For example, if a Glossary facet has four roles, Axon creates four swimlanes, one for each role.

Select a swimlane and drag a corner to resize the canvas vertically and horizontally. Select items from the toolbar, drag them to the canvas, and connect them. When you place an item on the canvas, you can click the item to view the toolbar options that are relevant to the object.

BPMN workflows use swimlanes to capture who is responsible for a set of tasks. The tasks that you specify in a swimlane becomes the responsibility of the role associated with the swimlane. If one or more roles do not contain any task in the workflow, you can leave the swimlanes empty or delete the swimlanes. If you want to create the swimlane again, you can use the tool bar to create a swimlane and you must specify the role name and the correct role ID.

Properties

In the **Properties** panel, you can specify additional properties for the items or tasks on the canvas. Additional properties include required and optional fields for each item. To perform the tasks in a workflow, you must configure the details such as due date and step description.

You must specify the required fields for the following items and tasks:

- User Task. Specify the due date by when the user must complete the task.
- Gateway. Specify labels for the lines that start from the gateway. The labels need to be short and unique. The labels serves decision routing actions when you run the workflow.

Workflow Diagram Example

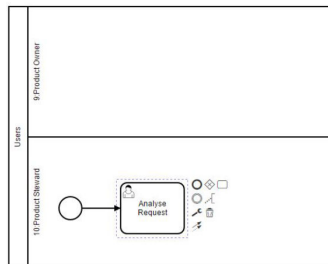
The example shows a new Default Workflow being created. Apart from the different start point, the functionality to build the workflow is identical. The facet used in this example is Product. After you select the Product facet, you can see that one default workflow already exists. You can either select this one to edit, or create another.

1. From the Axon toolbar, click **Admin Panel** under the user name.

The **Admin Dashboard** appears with the Axon version details, status of Axon services, and Axon message queues.

2. On the left navigation pane, click **DG Operating Model > Default Workflows**.
3. Select the **Product** facet for which you want to configure a workflow.
4. Choose to add a new workflow.
5. Enter a name for the workflow.
The name must contain a minimum of six characters.
6. Provide a description for the workflow.
Axon creates a canvas with many swimlanes based on the roles that are defined for the facet.
7. Remember that the swimlanes appear with a lane for each type of stakeholder role configured for the facet, that is for the Product Steward, Product Owner role.
8. Click into one of the lanes, so that a dotted line appears, and use the bin icon on the menu to delete this lane. You can add it back in later if required.
9. From the toolbar, choose the **Start Event**, and place it in the Steward's swimlane. This means that the objects Stewards' will receive the first request to action when a ticket is raised against this request.
10. Typically the first thing that anyone does is to validate that the request should have been routed to this workflow. If OK, then do something. If Not OK, inform the requestor and close the ticket.
11. The first step is to raise a User Action, and populate the Properties on the right.
 1. Click into the Start action.
 2. From the options cloud that appears, choose the User Action and drop it in the Steward's swimlane.
 3. A line will automatically draw between the two concepts.

The following image shows the start step and the first user task of the workflow:

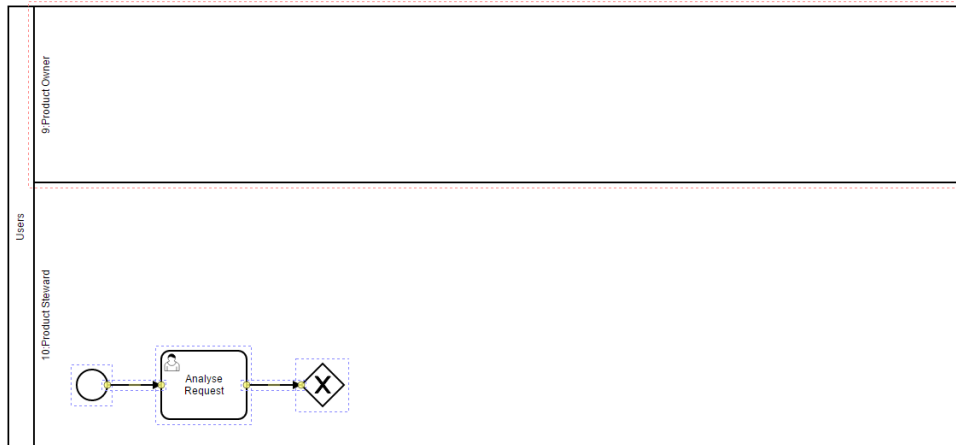


General	
Name	Analyse Request
Due Date	3 Days
Description	Ensure the request is valid and properly raised

The User Action can be populated by completing the Properties section, as above.

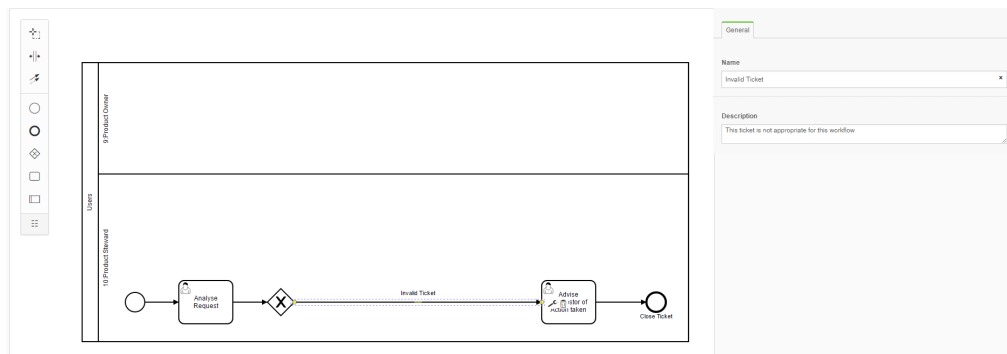
12. Next, you need a Gateway to show that there are two options - accept as valid request or reject.
 1. Click in the User Action and the same option cloud appears as before. This time select the diamond shaped concept, ensuring that it is placed in the Steward's swimlane.
 2. In the next picture the user has increased the horizontal width of all swimlanes, increased the height of the Steward's swimlane, and finally used the lasso tool on the Toolbar to grab and move the concepts you have created so far to the bottom of the swimlane.

The following image shows the increased length of the swimlane:



13. Now, you can add the two possible paths. First, an invalid request needs a User Action to Inform the user and then a Close Action.
 1. Always remember to click the predecessor object, create the User Action, and close the workflow. Remember to populate the Properties for each object.
 2. Lines leaving a gateway MUST have a name added to them, because these will appear in the any active workflow as labels on the Accept/Reject buttons. Keep them short and clear.

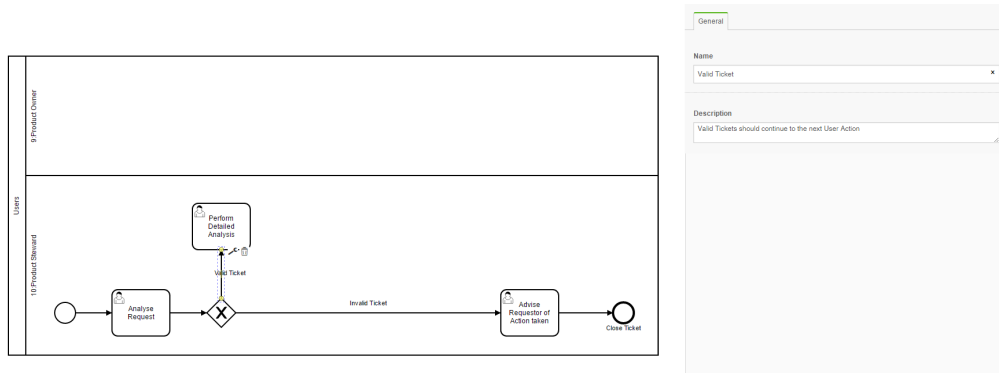
The following image shows the workflow diagram with the user task:



14. If you want to leave the Gateway on the alternative (valid request) path, then you need to create the next User Task.

This step is to 'Perform Detailed Analysis', and has been created in the picture below. As you can see, this is also performed by the Product Steward.

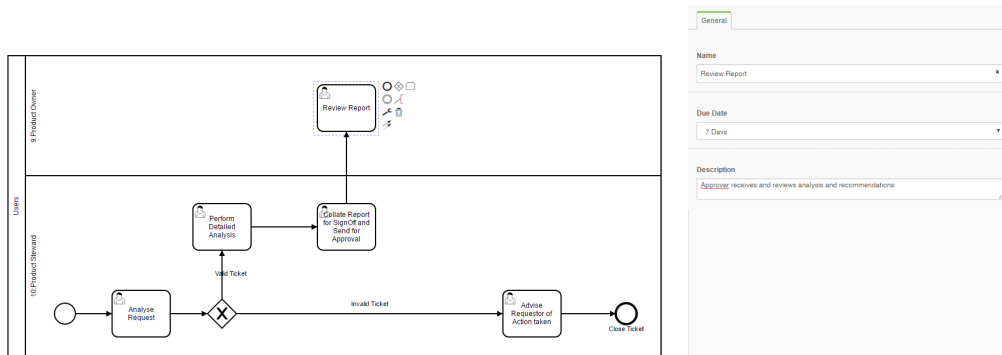
The following image shows the workflow diagram with the user task:



- After some additional tasks by the Steward shown as an additional User Task (Collate Report) in the same swimlane, it is time to send to the Product Owner user for review and approval.

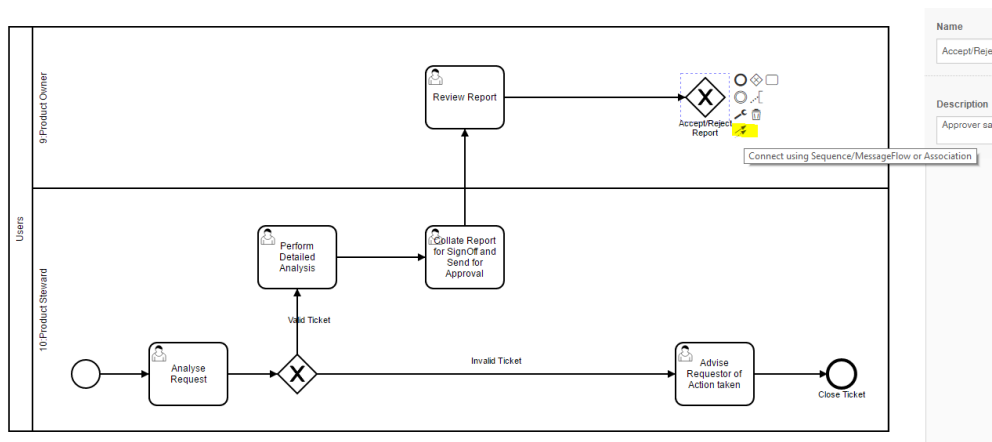
This time, from the option cloud on the 'Collate Report' User Action, simply drag the User Action into the Owner's swimlane, and fill in the Properties.

The following image shows the properties that you can fill in for the user task:



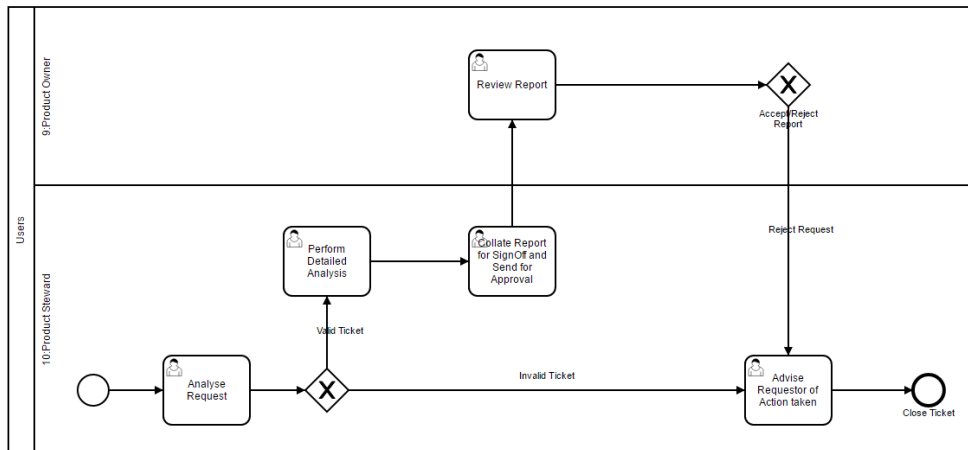
- As the possible actions are to either accept or reject the findings in the report, you need a Gateway to show these two alternatives. If the Owner rejects the report, then you should connect this new Gateway to the User Action already created to 'Advise Requestor of Action taken', and then you close the workflow.

The following image shows the alternatives for the gateway:



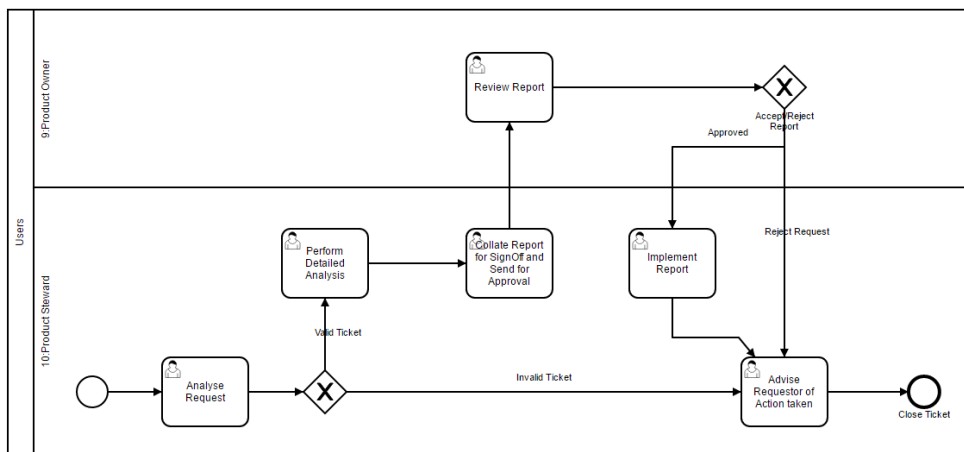
17. As this Gateway and the User Action both already appear on the page, you need to do something slightly different to connect them.
 1. Click on the Gateway, and select the lines icon, from the option cloud.
 2. Once clicked simply move your mouse toward the 'Advise Requestor...' User Action, and a line will be drawn between them.
 3. Remember to go back to this new line and name it. Click in the line between the two concepts and fill in the Properties. The line's name will later appear in the workflow step when the Owner has to accept/reject the step.

The following image shows the workflow with the Reject path complete:



18. If the reviewed report is accepted, add something in to show what happens. The Steward is expected to implement the report, so create a User Action in the Steward's swimlane.

The following image shows the action added to the steward role:

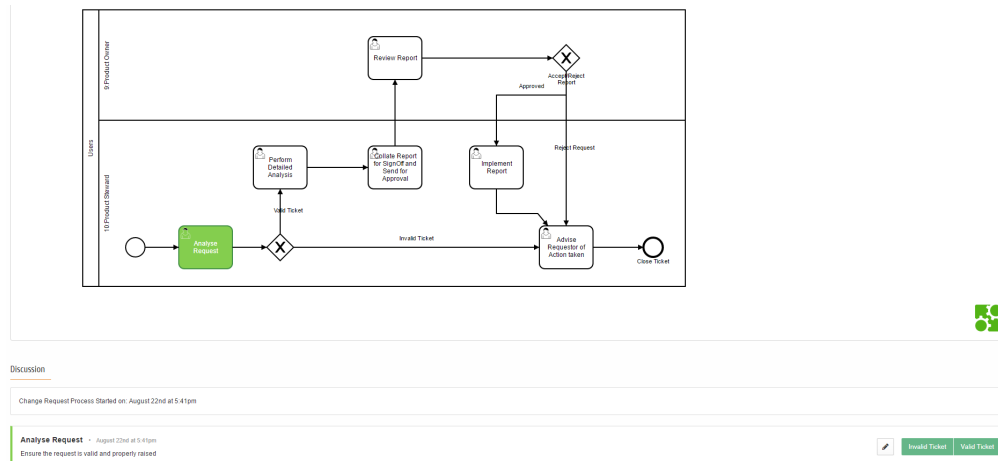


19. Save and close the workflow.
you now have a completed workflow. All paths ultimately lead to the Close event. All lines leading FROM a Gateway have a name, which creates the approve/reject buttons in a live workflow.
20. When a Change Request is raised against the workflow, you can see the CR on the canvas.

You can see that:

1. The Active Step, i.e. the step awaiting action is Green. If orange it is alerting users that the Due By Date is less than a day away.
2. The description that was created for this workflow step (in the Properties section) appears as guidance on the action expected by the Steward in the Discussion section below the canvas..
3. There are two green buttons in the Discussion, which allow the Steward to accept/reject the step. They have the same names as the lines that leave the Gateway immediately after the active User Action.

The following image shows the workflow diagram for the change request:



Connect Objects

The context of an object is critical information that you need to know. Axon derives the context of an object from the other objects it is connected to in different facets.

You can associate an object from one facet to another facet. The **Impact** tab of an object shows the connection of the object across many other facets. If you have edit permissions, you can connect the objects from the **Impact** tab.

From the **Impact** tab of an object, you can perform the following tasks:

- View and edit a connection.
- Create a connection.
- Search and add a connection.

View and Edit Modes

If you view an object in the View mode, you can see the facets to which the object is connected. If you view the same object in the Edit mode, you can see additional facets to which you can connect the object. For example, if you open a Data Set object, you can see the Policy facet in the View mode and the Policy, Client, and Legal Entity facets in the Edit mode.

The connections to objects in the other facets are unidirectional. For example, you can edit the Impact tab of a Process object to connect the object to the System object. If you look at the connected System object, you can view the relationship, but cannot edit the relationship.

Create Connections

Users with the appropriate edit permissions can add or manage connections. Create a connection in the Edit mode. Use the + icon to add a connection, and the - icon to delete a connection. When you create a connection, the fields that appear depend on the facet type.

The following fields might appear when you create a connection:

Field	Type	Description
Relationship Type	Required	The type of relationship between the object and facet. You can configure the list of the relationship types.
Object	Required	The name of the object that you want to connect the active object to.
Ref.	Optional	The reference number of the object that the object connects to. After you select an object, Axon automatically populates the reference number and ensures that the correct object is selected.
Owner	Optional	The owner of the object that the object connects to. After you select an object, Axon automatically populates the owner.
Description	Optional	Description of the relationships between the objects.

Search and Add Connections

You can provide search criteria to find and add objects. To search and add objects, click the **Search and Add** button next to the **Grid Settings**. You can select a lifecycle status or perform a keyword search to find the objects.

After the search results appear, you can perform the following tasks:

- Add each object one by one.
- Remove a collection of object connections.
- Add all the objects that belong to a hierarchy together based on the relationship type.
- Add the additional or missing objects if all the hierarchical objects are added.

Data Quality Rules

The Data Quality facet displays the data quality rules. You can configure different types of data quality rules to check the quality of the data in your systems. Technical users implement the rules in a third-party data quality product.

You can use Informatica Analyst and Informatica Developer to analyze the source data and metadata. Axon can import data quality information from profiles and scorecards that you define in Informatica Data Quality. You can create profiles to analyze the content, quality, and structure of data sources. Scorecards monitor data quality. You must install the Axon Agent before you can configure technical references to profiles and scorecards in Informatica Data Quality.

Data Quality Report holds the scores or ratings of the Data Quality Rules for a given period. Typically, a set of rows in a table are validated against a DQ Rule and the report list the percentage of compliant rows as well as

the number of exceptions. The report displays the scores in red, amber, or green color according to the rule thresholds that you have specified in the respective rule.

Some DQ systems provide results as exceptions or variances from a perfect score. For example, a 5% value might not meet the rule requirements. Axon requires the data as an achieved score. It only considers values that are in the following format:

- 0 or 1
- Yes or No
- True or False

When the profile result for a column is in numeric values other than Axon standard, there is no error logged in Axon. Axon updates the volume count result as 0%. When the profile result for a column has string values, then Axon records an error message.

Local DQ Rules

DQ rules defined within the context of a System are also referred to as Local Data Quality Rules. Only Local DQ rules can have scores or reports associated to them. All DQ dashboards seen in Axon relate to Local DQ Rules and reports.

Before you can create a local DQ Rule, you must create a data set with at least one attribute. DQ Rules are measured against the attributes in the data set. Create the attributes before you create the DQ Rules. You can create new local DQ rules manually or by bulk upload. During bulk upload, do not mix rules for different Data Sets in the same upload file.

Standard DQ Rules

Large organisations often have departments working independently of each other, using their own data sources and systems. In turn these functions are unaware that other areas use the same data, so set up their own controls and quality measurement. As a result the same data is often measured in different DQ tools/ systems/data sets. Where this occurs, it is desirable that similar data is subject to the same quality measurement standards. Axon facilitates this via Standard DQ Rules.

Standard DQ Rules set the guidelines for how anything linked to a Standard DQ Rule (Data Sets or Attributes) should be measured, wherever this occurs. Standard DQ rules are described at the glossary level. Since similar data should be associated to the same Glossary term, it is the ideal place to share common standards. Any local DQ rules controlling attributes linked to this glossary object can therefore be set up against these standards.

Creating Local DQ Rules

Create a local DQ Rule for a data set. You provide initial details when you create a new DQ rule. After you save the DQ rule, Axon redirects you to the edit mode where you can provide more details. In both create and edit modes, Axon marks the mandatory fields with a red asterisk.

1. From Unison search, open a data set object.
2. From the Actions menu, click **+ New DQ Rule**.
The New DQ Rule page opens.

3. In the **Definition** section of the **Summary** tab, configure the following properties:

Option	Description
Name*	Specify a name for the DQ rule.
Description*	Describe the logic for the DQ rule.
Ref*	Unique identifier for each object. Axon will auto-assign a unique reference ID if you leave this property blank.
Type*	Select from one of the following types of DQ rules: <ul style="list-style-type: none"> • Accuracy • Consistency • Validity • Timeliness • Integrity • Purity
Measured In*	Name of the system in which the rule is measured. This is often the name of the DQ profiling or measurement system used for the given data set.
Measuring Method*	How the DQ rule is evaluated. You can specify one of the following options: <ul style="list-style-type: none"> • System Function • Technical Script • Business Extract

4. In the **Optional Fields** section of the **Summary** tab, configure the following properties:

Option	Description
Measuring Method Description	Optional. Add relevant information about the measurement process.
Population	Optional. Describe the population in scope for the rule.
Technical Description	A technical description of the rule logic. Can include SQL or pseudo SQL.

5. In the **Attribute Items in Measure** section of the **Summary** tab, configure the following properties:

Option	Description
Attribute	Select the name of the attribute that the rule is measuring. Click the Add button to select multiple attributes.
Measured Against	Optional section for rule types only to show against which attribute in the current data set is being measured. Click the Edit icon to open the Select Component dialog box.

6. Click **Add Item** if you want to add more attributes to measure the DQ Rule against. Informatica recommends that you measure only one DQ Rule against one attribute.

7. In the **Classifications** section of the **Summary** tab, configure the following properties.

Option	Description
Lifecycle	Lifecycle status of the object.
Axon Viewing	Choose if the DQ Rule is public or non-public.
Criticality	Level of criticality . Select from one of the following options: <ul style="list-style-type: none"> • Low • Medium • High
Frequency	How often the rule is measured. Select one of the following values from the drop-down menu: <ul style="list-style-type: none"> • Daily • Weekly • Monthly • Quarterly • AdHoc • Bi-Weekly
Automation	How automated the DQ measurement process is. Select from one of the following options: <ul style="list-style-type: none"> • Fully Automated • Partially Automated • Manual • Unknown
Green Target	Enter this as a number from 0 to 100 to reflect the proportion of the measured data has achieved this level of performance Do not enter characters e.g. %. Decimal Points are acceptable, although results are rounded. Some DQ measurement systems report deviation from a perfect score rather than stating the actual score - do not enter as deviation, i.e. if 5% deviation is reported, enter '95'
Amber Target	A number from 0 to 100 that indicates the threshold value for amber color.

8. Click **Save and Close**.

Linking Profiles and Scorecards to Local DQ Rules

You can link DQ Rules to columns in Informatica Data Quality. Informatica Data Quality runs a profile or scorecard which you define against the data in a column or metric. Axon fetches the profile score or scorecard data and displays it as a report or dashboard in the data set, DQ rule or system.

You must create and save a DQ Rule before you link profiles and scorecards to DQ Rules.

1. From Unison search, open a data set object.
2. In the **Data Quality** tab, click the **Rules** sub-tab.
3. In the **Ref** column, click the DQ Rule that you want to edit.
Axon displays the DQ Rule.
4. Optionally, search for a DQ Rule from Unison or open the Data Quality facet in Unison to see existing rules.
5. Click **Edit**.

6. In the **Summary** tab, edit the **Technical Rule Reference** in the optional fields section under **Definition**. Axon displays the **Select Technical Rule Reference** dialog box.
7. Click either the **Scorecard** or **Profile** radio button.
8. Select a project that Axon displays. The list of projects are from the Model Repository Service in the Informatica domain.
9. Select the scorecard or profile and the column or metric.
10. Select the Frequency under **Basic Classifications** in the **Classifications section**.
11. Select a frequency and configure the scheduling details based on the frequency that you selected. Axon fetches scores from Data Quality based on these parameters.
12. Select **Execute Rule** for Axon to run the profile or scorecard in Informatica Data Quality at the scheduled frequency. The data is purged from Informatica Data Quality after the rule is executed. If you do not select **Execute Rule**, Axon fetches the latest data available in Informatica Data Quality.
13. Click **Save and Close**.

Enhance Local DQ Rules

Add information to DQ Rules after you create and save the DQ rule. You can update the existing data to provide more information or link it to other items in Axon.

All users of Axon can view the details in the DQ Rule objects. Only users with permissions on individual items can make edits. Users with no edit rights may be able to make associations to an item if they hold edit rights against other item types.

You can add more information to a DQ Rule in the following tabs.

Stakeholder Tab

Displays a list of stakeholders and followers for the DQ Rule.

You can view information about stakeholders in the following sections:

- Direct Stakeholders. Responsible for providing, defining or maintaining the item
- Stakeholder Community. If this item is connected to any other items in Axon, the stakeholders of those connected items collectively make up the wider stakeholder community.

Report Tab

Displays reports and results about the DQ rules. You can upload data or manually add data here.

Displays historical scores for the DQ Rule. Axon considers only the latest score for calculation in the DQ Dashboard. The same report is displayed in the Data Quality Dashboard in the Data Quality tab of a Data Set.

You can view information in the following sections:

- DQ Results. A chart of DQ performance for the rule over the last 12 months.
- DQ Reports. Gives greater detail on all DQ reports added for the rule.

Relationships Tab

Summarises information on Data Quality into the following sub-views:

- Standardised DQ Rules
- Non-Standardised DQ Rules

Impact Tab

The Impact tab shows how connected an item is across many other facets

Creating Standard DQ Rules

Create a standard DQ Rule in a Glossary object. You must have edit permission on the Glossary object.

1. From Unison search, open the Glossary object where you want to create a standard DQ Rule.
2. Click the **Data Quality** tab.
3. Click the Edit icon.
4. In the Standard Data Quality Rules section, specify the following properties:

Option	Description
Standard Ref	Unique identifier for each object. Axon will auto-assign a unique reference ID if you leave this property blank.
Name	Specify a name for the standard DQ rule.
Type	Select from one of the following types of DQ rules: <ul style="list-style-type: none">• Completeness• Accuracy• Consistency• Validity• Timeliness
Description	Describe the logic for the standard DQ rule.
Technical Description	A technical description of the rule logic. Can include SQL or pseudo SQL.
Criticality	Level of criticality . Select from one of the following options: <ul style="list-style-type: none">• Low• Medium• High
Axon Status	Select one of the following status from the drop-down menu: <ul style="list-style-type: none">• Active• In Design• Being Implemented• Obsolete• Deleted

5. Click - if you choose to add a new standard rule
6. Click **Save and Close**.

Associating Local Data Quality Rules to a Standard Data Quality Rule

If an existing local Data Quality rule that applies to an attribute is associated with the Glossary object, you can view it in the Local Data Quality Rules grid in the **Data Quality** tab of the Glossary object.

Define local Data Quality rules before you associate a local Data Quality rule to a standard Data Quality rule.

1. From Unison search, open the Glossary object where you want to associate a standard Data Quality Rule.

2. Click the **Data Quality** tab.
3. Click the **+** icon below the local Data Quality Rule to copy it as a standard Data Quality Rule.

Manually Add DQ Report Data

Manually add DQ report data by editing a local DQ Rule. You cannot add scores to a standard DQ Rule.

1. From Unison search, open a data set object.
2. In the **Data Quality** tab, click the **Rules** sub-tab.
3. In the **Ref** column, click the DQ Rule that you want to edit.

Axon displays the DQ Rule.

4. Click the **Report** tab.
5. Click **Edit**.
6. Configure the following properties:

Option	Description
Report Date	The date of the DQ report in the format DD/MM/YYYY. This is not the date the reports are uploaded to Axon, it is when the evaluation of the data was performed in your DQ system. Multiple reports for the same item and multiple items can be uploaded at the same time.
Result	The score expressed as a number between 0 and 100, of items that meet the expectations of the quality rule. Axon displays this number as a percentage. Do not use a % sign when entering data. You can enter scores expressed with decimal places. Most Axon screens round off the score with a decimal value.
Report URL	Link to the full report generated by the DQ system.
Exception Count	Some DQ systems report the number of records that did not meet standards. Specify that information.
Volume	Number of observations in the report.

7. Click the **+** icon to add another row.
8. Click **Save and Close**.

Bulk Upload Objects

If you have large amounts of objects, relationships, and roles to enter in Axon, you can use the bulk upload option. You can download a Microsoft Excel template from Axon for bulk upload.

A WebUser with the New or Edit permission, Admin, and SuperAdmin can bulk upload data to Axon. If a web user has the New permission for an object, the user can upload a new file but cannot upload existing items. If a web user has the Edit permission, the user can update existing items but cannot upload a new file. A web user can upload new items or update existing relationships and roles for objects that they can add or edit.

Use the bulk upload template when you need to perform the following tasks:

- Add new objects, relationships, and roles to Axon.

- Update existing objects, relationships, and roles to Axon.

You can use a Microsoft Excel template that you have created to upload data to Axon. Informatica recommends that you use the templates that Axon provides.

You can use a comma-separated-value (CSV) file format to bulk upload to Axon. You can use a CSV file that you created to upload data to Axon. If you want to use the Axon template, you need to download and save the Microsoft Excel template in the CSV format.

Note: You must have the necessary permission to create or update Axon objects before you can bulk upload data.

You can bulk upload the following types of objects:

- Attribute
- Business Area
- Capability
- Data Set
- DQ Measure
- DQ Report
- Glossary
- Interface
- Legal
- Org Unit
- People
- Policy
- Process
- Product
- Project
- System

You can bulk upload the following types of relationships:

- Attribute X Attribute
- Business Area X Process
- Capability X Process
- Glossary X Glossary
- Glossary X Project
- Interface X Glossary
- People X People
- Policy X Business Area
- Policy X Glossary
- Policy X Process
- Policy X Project
- Process X Glossary
- Process X Legal
- Process X System

- Process X Process
- Project X System
- System X Glossary
- System X Product

You can bulk upload the following types of roles:

- Dataset
- Glossary
- Interface
- Process
- System

Bulk Uploading Data

To bulk upload data, you must use a Microsoft Excel template. Enter the data in the template and upload the filled template to Axon.

The following image shows the tasks that you must perform to upload data to Axon:

1. Enter data in the Microsoft Excel template and select the template file in Axon.
2. Map the columns in the template to the columns in Axon.
3. Upload the template to Axon.

Select Template File

1. In the Axon toolbar, click **Create > Upload from file**.
Axon displays the **Upload from File** page. Use the wizard to choose options related to bulk uploading of data. The first step of the wizard is **Choose File**.
2. From the **Upload Type** list, select the type of item that you want to upload. The type of upload items include Relationship, Object, and Role.
3. Based on the type of upload item, select the type of a relationship, object, or role in the field to the right of the **Upload Type** list.
4. Choose whether you want to upload new items or update existing items.
The options to upload a new item or update an existing item appear based on the type of item that you choose to upload.

5. Click **Download Template**.
A Microsoft Excel template is downloaded to the Downloads folder.
6. In the Microsoft Excel template, add the data that you want to add or update in Axon, and then save the template.
Note: In the template, columns with headers in red color are required.
7. Click **Choose File** and select the template file.
8. To cancel the upload when Axon detects a conflict, select **Cancel on warning**.
9. Click **Next – Map Columns**.

Map Columns

1. In the **Map Columns** step of the wizard, map the columns in the Microsoft Excel template to the properties that Axon supports. Double-click a column in the **Column in Uploaded File** column and select the value that corresponds to the value in the **Axon Field** column.
2. To continue with the bulk upload wizard steps, click **Next Start Upload**.

Upload Template File

1. In the **Upload** step of the wizard, review the progress of the upload task. If the upload fails, you can download the error report to troubleshoot the upload.
Axon displays a progress bar and a message to indicate the progress of the upload task.
2. To view the status of the bulk upload job, click **Go to My Jobs**.
Axon displays the list of pending tasks in the **My Jobs** page of the **Activity Stream** tab. You can open the **My Jobs** page from the **People** object to view the progress of the upload task in the **Status** column at any time.
3. From the **Action** column in the **My Jobs** page, you can upload a fixed file again, or download the original file that you uploaded.
4. Optionally, click the **Notifications** icon on the Axon toolbar and click the **Bulk Upload** tab to see the progress of the pending task.

CHAPTER 4

Administer

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Administrative Tasks Overview

As an administrator, you can perform administrative tasks such as managing users, configuring roles, assigning permissions, adding users, and customizing the Axon interface. You must have an Admin or SuperAdmin profile before you can perform administrative tasks.

User Roles

A role is a collection of permissions. Permissions that you assign to a role determine the actions that users who are assigned the role can perform. When you assign a role to a user, you also define the scope of the permissions by specifying the facet for which the role applies.

A user can perform one or more of the following types of tasks based on the permissions that you assign:

- New. Create objects.
- Edit. Edit objects.
- View. View objects.

Stakeholders have business or technical expertise on the object. The following types of stakeholder roles are available in Axon:

- Authority Role
- Knowledge Role
- Ownership Role
- SMR Role
- Stewardship Role

As an administrator, you can assign one of the stakeholder roles to any Axon user. When you make a user a stakeholder for an object, other users see that the stakeholder user has ownership or responsibility for the object. Typically, you assign stakeholder roles to Axon users according to the specific expertise that the users demonstrate. If an Axon user is not available to perform a task that is required by a role, you can assign the same stakeholder role to another user.

Configure Roles

Axon provides a number of default roles. You can configure new roles based on the needs of your organization.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, click **Roles and Responsibilities** under **DG Operating Model**.
3. Click **Edit**.
4. In the **Roles and Responsibilities** page, click the **+** icon to add a new role.
5. Configure the following properties:

Option	Description
PrimaryName	Provide a name for the role.

Option	Description
Description	Provide a description for the role.
Default	Select the checkbox to make this a default role when you save an object. All objects need at least one default role. If you select this option, you must assign the Edit permission to the role.
Module	From the drop-down menu, select a module. In the object page, you can filter the grid by module to quickly find the role.
Role Type	From the drop-down menu, select a role type. The role type affects dashboards and scorecards.

- Click **Save and Close**.

Object Permissions

Configure the actions that a role can perform by assigning permissions. When you assign permissions to a role, all users who are assigned the role inherit the permissions.

You can grant the following permissions:

New

A role with the **New** permission can create objects within the same facet as the object for which you have assigned the role.

Edit

A role that has the **Edit** permission on an object can edit and update the object properties.

View

A user with the **View** permission can view objects. All Axon users have the **View** permission.

The following table lists the permissions for Axon users when they search for "Deleted" objects in Unison search:

User Profile	Deleted Objects Appear in Unison Search	Can Open Deleted Objects from Unison Search
User not logged into Axon	No	No
WebUser with no stakeholder role	No	No
WebUser with stakeholder role	No	No
Admin or SuperAdmin	Yes	Yes

The following table lists the permissions for Axon users when they search for "Non-Public" objects in Unison search:

User Profile	Non-Public Objects Appear in Unison Search	Can Open Non-Public Objects from Unison Search
User not logged into Axon	No	No
WebUser with no stakeholder role	Yes	No
WebUser with stakeholder role	Yes	Yes
Admin or SuperAdmin	Yes	Yes

Assign Permissions to Roles

Permissions define the level of access that users have on objects in a facet. You must define the scope of the permission by selecting the facet for which the role is valid. All users who are assigned the role inherit the permissions.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left of the page, click **Role Permissions** under **DG Operating Model**.
3. Click **Edit**.
4. Click the **+** icon against the role that you want to update.
5. Configure the following properties:

Option	Description
Module	From the drop-down menu, select the facet for which the permissions is valid.
Role	From the drop-down menu, select the role for which the permission is valid.
Permission	From the drop-down menu, select the type of permission that you want to assign to the role.

6. Click **Save and Close**.

Default Workflows

Default workflows are specific to a facet and apply to all the objects in the facet.

Each facet can have multiple default workflows. If you want multiple objects to follow a workflow, create a default workflow. For example, you can use one or more default workflows to control changes to any objects in the Glossary facet.

A SuperAdmin user can configure and manage default workflows. Create and edit a default workflow from the Admin Panel menu. To edit a default workflow, you must select a facet and workflow. You can assign tasks to different roles that are defined for the facet.

Create a Default Workflow

You can create default workflows for a facet. The default workflow applies to all the objects in the facet. You must have a SuperAdmin profile to create a default workflow.

1. From the Axon toolbar, click **Admin Panel** under the user name.
The **Admin Dashboard** appears with the Axon version details, status of Axon services, and Axon message queues.
2. On the left navigation pane, click **DG Operating Model > Default Workflows**.
3. Select the facet for which you want to configure a workflow.
4. Choose to add a new workflow.
5. Enter a name for the workflow.
The name must contain a minimum of six characters.
6. Provide a description for the workflow.
Axon creates a canvas with many swimlanes based on the roles that are defined for the facet.
7. In **Workflow Diagram** section, create a workflow diagram on the canvas. Use the **Toolbar** to add objects and connect them. Use the **Properties** panel to specify additional properties for the objects.
8. In the workflow diagram, specify the required fields for the following items:
 - User Task. You need to enter a name and due date for a user task.
 - Exclusive Gateway. Specify short, unique labels for the lines that start from an exclusive gateway. The labels serve decision routing actions when you run the workflow. A gateway and the preceding user task must be close to one another in the same swimlane because they both are a logical unit and must be performed by the same user.
9. Click **Save**.

Add Users

You can add users to Axon by manually creating a People object or by bulk uploading People objects. To manually create a People object or to bulk upload People, you must have the Admin or SuperAdmin profile.

Before you can create People objects, you must create the necessary Org Unit objects. You can create Org Units manually or by bulk importing objects. When you add a People object, you may require to configure the Manager property. The Manager property specifies the reporting structure. Ensure that the Manager accounts are available in Axon before you create the People objects.

If your organization uses Single Sign-On, you can link the People facet to an external databases such as LDAP. You can link the Org Unit facet to a HR view. If you link the People facet to an external database, you do not create People and Org Unit objects.

Bulk Upload Users to the People Facet

You can bulk upload a large number of People objects to Axon. Specify data in a Microsoft Excel sheet and upload the sheet to Axon. You must have the Admin or SuperAdmin profile to bulk upload data to Axon.

1. In the Axon toolbar, click **Upload from file** from the **Create** menu.
Axon displays the **Upload from File** page. Use the wizard to make choices related to bulk uploading of data.
2. In the **Choose File** step of the wizard, download an object template for People.
3. Configure the following properties in the Microsoft Excel file:

Field	Description
First Name	Required. First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
Last Name	Required. Last name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
Function	Job title or role of the user.
Function Description	Job description of the role of the user.
Description	Description about the user.
Email	Required. Email address of the user. Must be unique. Axon sends emails to this address.
Password	A password to provide access to the user. The user can change the password later. Not required if you enable Single Sign-On authentication.
Org Unit Reference	Required. The reference identifier of the organizational unit that the user is associated with.
Profile	Required. A user profile that controls the tasks that the user can perform and the objects that the user can view. Select one of the following user profiles: <ul style="list-style-type: none">- WebUser- Admin- SuperAdmin- Data Importer
Office Location	Office location of the user.
Internal Mail Code	Internal office mail code of the user.
Office Telephone	Office phone number of the user.
Mobile/Cell	Mobile phone number of the user.

Field	Description
LAN ID	Network ID of the user. LAN ID might be required if you want to enable Single Sign-On authentication. If the LAN ID column is empty, you must not map the LAN ID column of the template to any field in the Axon Field column when you perform a bulk upload.
Employment Type	Required. The type of employment of the user. Specify whether the employment of the user is external or internal.
Lifecycle	Required. The status of the employment of the user. You can select one of the following default statuses: - Working - Temporarily Inactive - Pending Deactivation - Left the Company An administrator can configure these values. Specify customized values if your organization does not have the default values.

4. Select the file from your computer and choose to update existing objects or upload new items.
5. Click **Next - Map Columns**.
6. In the **Map Columns** step of the wizard, map the columns in the Excel file to the properties that Axon supports. You can select the column that is present in the Excel file that you want to map to the Axon field from the drop-down menu from the **Column in Uploaded File** property.
7. To continue with the bulk upload wizard steps, click **Next - Start Upload**.
8. In the **Upload** step of the wizard, review the progress of the upload task. Axon displays a progress bar and a message to indicate the progress of the upload task.

Manually Add Users to the People Facet

You create users in the People facet like how you create other objects in Axon. You must be logged in with an Admin profile to create People.

1. From the toolbar, click **Create**.
2. From the sub-menu, click **People** under **Organizational**.
3. Configure the following properties in the **Summary** tab:

Option	Description
Email	Email address of the person. Must be unique. Axon sends emails to this address.
Password	Optional. Provide a password. The user can change the password later. Not required when using Single Sign-On
Confirm	Repeat the password.

Option	Description
Profile	User profile assigned to the person. The object is always saved with the WebUser profile, regardless of the value that you select here. Note: To change the profile after you save the object, open the object in Edit mode and select a different profile value.
Axon Status	Status of the object.
First Name	First name of the user. Specify the name as it is recorded in the LDAP directory of your organization.
Last Name	Last name of the user. Specify the name as it is recorded in the LDAP directory of your organization.
Description	Other relevant information about the user. Axon displays this information in the About Me section.
Org Unit	Organization unit that the user is associated with.
Function Name	Job title or role of the user.
Function Description	Job description of the role of the user.

4. Click **Save & Close** to save the user details.

View Licensed Users

You can view the count and list of licensed users that have create or edit permissions in Axon. The licensed users include SuperAdmin, Admin, and any other user that is assigned a role with create or edit permissions.

View the number of licensed users and the list of users to verify that the licenses are effectively used in your organization. For example, if you buy 20 licenses and if you find that your organization uses only 15 licenses, you can assign the remaining licenses to additional users. If the licenses used are more than 20, then you can revoke some of the licenses.

Log in with the SuperAdmin profile to view the number of licensed users from the Admin Dashboard. To view the list of licensed users, click **DG Operating Model > Licensed Users**. You can filter the results based on the type of user profile, first name, and last name.

Bulk Update

You can perform a bulk update to make changes to certain fields for a single object or multiple objects in a facet at a time.

A user with the SuperAdmin profile can perform a bulk update.

In a facet, select as many objects as you want and click **Bulk Update**. In the **Bulk Update Items** section, you can see the selected objects. In the **Definition** section, you can view the fields that you can update for the

objects. Use bulk update to make a collection of changes at once. For example, change the **Axon Status** from "Inactive" to "Active" using a single update instead of changing the status from each object.

Note: Axon does not perform bulk updates on locked objects.

Manage Locks

Locks prevent users from editing an object. With an Admin profile, you can manage locked objects.

A content manager can assign one of the following types of locks:

Edit Lock

This lock prevents other users from editing an object that is currently being edited by a content manager. After a content manager finishes editing the object and clicks **Save and Close**, Axon removes the edit lock. You can manually remove an edit lock if Axon does not automatically remove the edit lock after the content manager finishes editing the object.

Permanent Lock

Content managers can assign a permanent lock to an object that they are editing. Permanent locks persist even after the object is closed. This prevents other users from editing the item until the content manager who assigned the lock unlocks the object.

Axon displays the name of the user who has assigned the permanent lock when you hover the cursor over the lock. As an administrator, you can unlock an object that has a permanent lock. Before you remove a permanent lock, you must contact the content manager who placed the lock to ensure that edits made to the object are not lost.

Configure Glossary Rules Engine

You can configure Axon to customize the search behavior and automate connections to Glossary items are made. You need a SuperAdmin profile to access the **Automatic Glossary Assignment Dashboard** page. In this page, you can find links that describe the application of the glossary term around the business.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the super admin menu on the left of the page, click **Glossary Rules Engine** under **Operational Management**.
3. Configure the following properties in the **Summary** tab of the **Automatic Glossary Assignment Dashboard** page:

Option	Description
Choose System	From the drop-down menu, select the system you want to run rules against.
Only Process Uncategorized Attributes?	Select Yes to apply changes to glossaries that currently have no glossary assigned to them. Select No to alter existing glossary assignments.

Option	Description
Choose Commit Mode	Select Dry Run Mode to highlight changes that can be made without affecting any data. Select Full Commit Mode to apply changes to glossaries in Axon.
Include RI Copy-Across Categoriser?	Choose to copy glossary information across the attribute lineage. Select No to not copy glossary information across the attribute lineage
Include Custom Rules?	Choose to include any rule based assignment. Select No to exclude any rule based assignment.
Include PK Copy-Down Categoriser?	Choose to copy data set glossary information to the primary key attributes within the data set.
Include Closure Categoriser?	Choose to trigger additional logic as configured on the Axon instance.
Later Passes Can Overwrite Earlier Ones?	Choose to avoid lower ranked rules to affect previous pass rules.

4. In the **Manually Override Rule** property, enter a comma separated list of rule IDs. Axon runs only the given collection of rules.
5. Review the attributes that match the rules and search engine settings. When you run these changes in full commit mode, the values Axon changes the glossary assignment based on the summary in the **Affected Items** grid.
6. Click **Run**.

Reindex Search Service and Rebuild Maps Database

Axon uses Apache Solr to index and search objects. The graph database stores the maps that Axon displays.

You can reindex the Solr service if Axon cannot retrieve objects from a search query. Similarly, you can rebuild the graph database if Axon cannot display maps.

Reindex Search Service

You might want to reindex the search service under the following circumstances:

- You have created an object but Axon does not display it in the search result.
- You have migrated all Axon data from one instance to another.

To reindex the search service, perform the following steps:

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, click **Operational Management**.
3. In the **Axon Management** page, click **Administrator's Panel**.
4. Select the **Reindex Solr** option, and click **Run**.

To reindex the Solr service using the command line interface, go to the <INSTALLATION_DIR>/axonhome/axon directory and run the following command:

```
php app/console diaku:reindex-solr
```


Rebuild Graph Database

You might want to rebuild the graph database under the following circumstances:

- Axon does not display maps in the **Maps** tab.
- You have migrated all Axon data from one instance to another.

To rebuild the graph database, perform the following steps:

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, click **Operational Management**.
3. In the **Axon Management** page, click **Administrator's Panel**.
4. Select the **Rebuild Graph DB** option, and click **Run**.

To rebuild the graph database from the Linux environment, go to the `<INSTALLATION_DIR>/axonhome/axon` directory, and run the following command:

```
php app/console diaku:run-full-etl
```

After you rebuild the database, run the following commands to restart the Daemon Tools, odbConsumer, and Unison Search services:

```
service axon_daemontools restart
service OdbConsumer restart
service axon_unison_microservice restart
```

Download Logs

You can download application logs to troubleshoot the errors that occur in Axon.

Application logs store internal errors that occur while you work with the Axon interface. For example, you might not be able to edit an object even if you have permissions.

A user with the Admin or SuperAdmin profile can view the application logs. To download application logs, click **Download Logs** from the **Operational Management** menu on the Admin Panel page. You can open or save the `application.log` file to view the logs.

Configure Dropdowns

You can assign classifications when you create objects. If you have a SuperAdmin profile, you can create new classifications or modify the default classifications to suit the needs of your organization.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, click **Dropdown Configurations** under **Meta-Model Administration**.
3. In the **Dropdown Configurations** page, select a module from the drop-down list in the **Choice** property.
Axon filters the list of choices to display the options available in the facet that you selected.
4. Click the module that you want to edit.
Axon displays the configuration menu editor.
5. In the configuration page, click the **+** icon to add a new item to the drop-down menu.

For example, if you selected Process Duration Type, you can add more values, such as seconds and minutes.

6. Configure the following properties:

Option	Description
PrimaryName	Specify a name that Axon will display in the drop-down menu.
Description	Specify a description that Axon will display in the drop-down menu.

7. Click **Save and Close**.

Configure Static Pages

Axon contains a number of static HTML pages. If you have a SuperAdmin profile, you can customize the static pages.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, click **Static Page Editor** under **Meta-Model Administration**.
 - To create a new static page, click **+ New Static Page** from the **Actions** menu.
 - To edit an existing static page, click the title of the static page.
3. Configure the static page properties.

Option	Description
Title	Specify a title for the static page. Axon does not display the title anywhere.
Link	Specify a link for the static page. Axon configures the URL of the page in the following format: <Axon_URL>/<link>
Context	Specify a description for the static page. Axon does not display the context anywhere.
Content	Specify the content that is displayed in the static page. You can use HTML tags to format the content.
Homepage	Choose to make this page the homepage.

4. Click **Save and Close**.

View System Information

Administrators can view system information from the Admin Panel. Axon displays static information and real time information. Use the system information to troubleshoot Axon before you contact Informatica Global Customer Support.

Axon displays the following static information in the Admin Panel:

- Axon version
- Axon build
- Axon core
- Build date

Axon displays the following real time data in the Admin Panel:

- Status of the Axon services
- Axon message queue

Axon represents the status of Axon services using colors, and reports the health of the application services. A green-colored dot next to a service means that the service is healthy. A red-colored dot indicates that the service has shut down.

You can also check the status of specific services from the Linux environment. To check the status of a service, run the following command as a root user or sudo user:

```
service <service_name> status
```

For example, to check the status of the Search service, run the following command:

```
service tomcat-solr status
```

For the complete list of services used by Axon, see the *Working with Services* topic in the *Monitoring Axon* chapter.

Display Your Organization Logo

You can replace the logo in the Axon toolbar with the logo of your organization.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, under the **Customize & Configure** category, click **Change Logo**.
3. In the **Upload Logo** field, click **Browse** to select the image file that contains the logo of your organization.
4. Click **Save** to upload the file to Axon.
5. Run the following commands in the Linux environment to stop the HTTPD and Memcached services, clear the contents of the `cache` directory, and start the HTTPD and Memcached services:

```
service httpd stop
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached stop
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached start
service httpd start
```

Customize the Axon Interface Theme

You can change the colors of the Axon interface to reflect the theme and colors of your organization.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, under the **Customize & Configure** category, click **Customize Styles**.
3. In the **Upload Custom CSS** field, enter the stylesheet content for the theme and colors of your organization.
4. Click **Save**.
5. Run the following commands in the Linux environment to stop the HTTPD and Memcached services, clear the contents of the `cache` directory, and start the HTTPD and Memcached services:

```
service httpd stop
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached stop
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached start
service httpd start
```

Linking to Enterprise Metadata

Integrate Axon with Informatica Enterprise Data Catalog to view links to technical enterprise assets in systems, glossaries, and data sets. After integration, Axon fetches Enterprise Data Catalog resources and fields and displays them in the **Resources** and **Fields** facets. You can link resources to systems. You can link fields to attributes in data sets. Axon uses Informatica CLAIRE to recommend attributes to which you can link the fields.

To view a field from Enterprise Data Catalog that you linked to an attribute, navigate to **Linked Fields** on the **Attributes** tab of a **Data Set** facet. In the **Relationships** tab of a **Data Set** facet, you can click **Show Recommendations** to view the related attributes that Axon recommends for possible linking with fields. Axon displays attribute recommendations only if the associated fields are interlinked in Enterprise Data Catalog. You also need to ensure that you provide the accurate Axon Resource Name parameter value when you configure access to Enterprise Data Catalog.

For a list of resource types available in Enterprise Data Catalog, see the *Catalog Administrator Guide*.

Configure Access to Enterprise Data Catalog

If you selected the advanced configuration option during Axon installation, you would have entered the configuration settings for Enterprise Data Catalog. If you did not select advanced configuration during Axon installation or if you want to update the connection settings for Enterprise Data Catalog after the installation, go to the Axon Admin Panel.

You must have the Super Admin profile to perform this task.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, under the **Customize & Configure** category, click **Configure Axon**.
3. In the **Group** dropdown, select **Enterprise Data Catalog**.

- Click **Edit**, and configure the following properties:

Property	Description
Enterprise Data Catalog Server Host	URL of the Enterprise Data Catalog service in the following format: http(s)://<host_name> or http(s)://<IP_address>
Enterprise Data Catalog Server Port	Port number of the Enterprise Data Catalog service
Enterprise Data Catalog Server Login User Name	User name to log in to Enterprise Data Catalog server
Enterprise Data Catalog Server Login Password	Password to log in to Enterprise Data Catalog server
Enterprise Data Catalog Server Login Namespace	User security domain of Enterprise Data Catalog server
Enterprise Data Catalog Axon Resource Name	Resource name in Enterprise Data Catalog that is configured to connect to your specific Axon application

- Click **Save**.
- In the Linux environment, run the following command to clear the contents of the `cache` directory:

```
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
```

- Run the following command to restart the Memcached service:

```
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached restart
```

- Run the following command to restart the HTTPD service:

```
service httpd restart
```

Note: When you clear the cache and restart the Memcached and HTTPD services, the Axon web interface might be disrupted for some users that are logged into Axon. Informatica recommends that you update the cache after you save your changes in all the **Configure Axon** pages. Additionally, perform this action during a maintenance period when very few users are using Axon.

Enterprise Catalog Facets

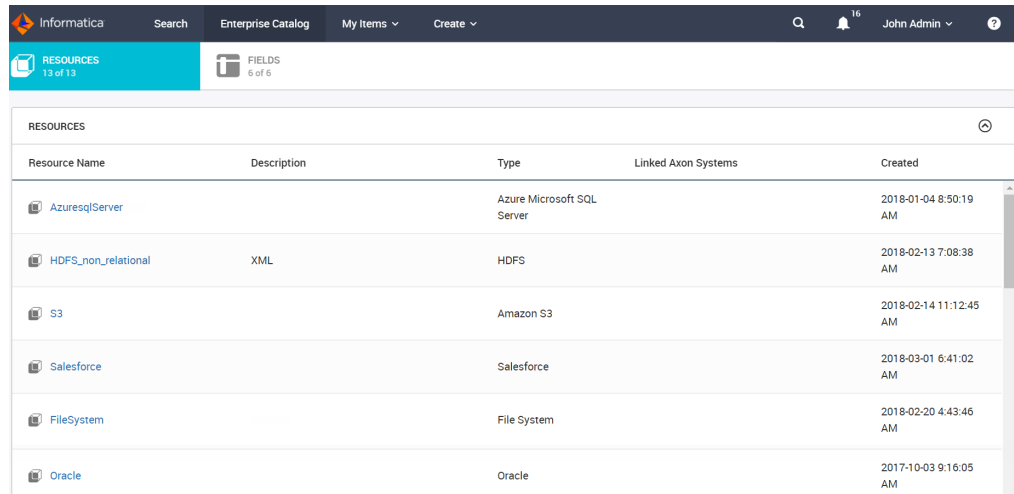
Users with the admin profile can view enterprise metadata from the Axon toolbar. After integrating Axon and Enterprise Data Catalog, users with an administrator profile can view a list of resources from Enterprise Data Catalog in the **Resources** facet and fields data in the **Fields** facet under **Enterprise Catalog**. WebUsers can view field information in attributes and view resource information in System and Glossary read views.

Axon displays enterprise metadata in the following facets:

Resources Facet

A resource is an Enterprise Data Catalog object that represents an external data source or metadata repository from where scanners extract metadata. Scanners in Enterprise Data Catalog fetch the metadata from resources. Enterprise Data Catalog performs basic metadata operations, such as extraction, storage, and management of metadata at the resource level. Axon displays resources from the relational sources, file systems such as Amazon S3, Native, and HDFS, and Salesforce application from Enterprise Data Catalog.

The following image shows a sample list of Enterprise Catalog resources:



The screenshot shows the Enterprise Catalog interface. At the top, there is a navigation bar with 'Informatica', 'Search', 'Enterprise Catalog', 'My Items', and 'Create'. Below this, there are two tabs: 'RESOURCES' (13 of 13) and 'FIELDS' (6 of 6). The main content area displays a table of resources with the following columns: Resource Name, Description, Type, Linked Axon Systems, and Created. The table contains six rows of data.

Resource Name	Description	Type	Linked Axon Systems	Created
AzureSqlServer		Azure Microsoft SQL Server		2018-01-04 8:50:19 AM
HDFS_non_relational	XML	HDFS		2018-02-13 7:08:38 AM
S3		Amazon S3		2018-02-14 11:12:45 AM
Salesforce		Salesforce		2018-03-01 6:41:02 AM
FileSystem		File System		2018-02-20 4:43:46 AM
Oracle		Oracle		2017-10-03 9:16:05 AM

The **Resources** facet displays the following information in a tabular format:

- Resource Name
- Description
- Type
- Linked Axon Systems
- Created

The **Resource Name** column contains the hyperlink to the resources in Enterprise Data Catalog. The **Linked Axon Systems** column displays information after you link systems to resources. All other columns display information that Axon fetches from Enterprise Data Catalog.

If you have access to only Enterprise Data Catalog or both Enterprise Data Catalog and Secure@Source, the Resource Name hyperlink opens the resource information in the Enterprise Data Catalog application. If you have access to only Secure@Source, you can click the Resource Name hyperlink to view the list of data stores in the Secure@Source application. You can search for the data store name from the list of data stores.

You can filter the information in the **Resources** facet by filter type. You can search by resource name and narrow down your search by the uploaded or updated date. The created date is in the YYYY/MM/DD HH:MI:SS format.

Fields Facet

After you link systems to resources, Axon displays fields from the linked resources in the **Fields** facet.

The following image shows the list of Enterprise Catalog fields:

Name	Type	Parent Name	Resource Name	Status	Linked Glossary	Inferred Glossary
FIRST_NAME	Column	CUSTOMERS	Oracle	Reported		
FAVORITE_WEBSITE	Column	CUSTOMERS	Oracle	Reported		
LAST_NAME	Column	CUSTOMERS	Oracle	Reported		
DEPT_NAME	Column	DEPARTMENTS	Oracle	Reported		
DEPT_ID	Column	DEPARTMENTS	Oracle	Reported		
CUSTOMER_ID	Column	CUSTOMERS	Oracle	Reported		

The **Fields** facet displays the following information in a tabular format:

- Name
- Type
- Parent Name
- Resource Name
- Status
- Linked Glossary
- Inferred Glossary

You can view the following types of Enterprise Catalog fields in Axon: Column, JSON Field, XML Field, CSV Field, and Salesforce Field.

In the **Linked Glossary** column, you can view the Axon glossaries that you linked to fields in Enterprise Data Catalog. In the **Inferred Glossary** column, you can view the Axon glossaries linked to data domains in Enterprise Data Catalog. If the data domain has one or more than one column associated with the data domain, all the fields appear in the **Fields** facet with the same Axon glossary name listed in the **Inferred Glossary** column. Axon provides glossary recommendations for attributes.

Click the name, parent name, and resource name links in the facet to launch Enterprise Data Catalog and view more information about each item.

You can create an Axon resource in Catalog Administrator. For more information on the resource-related task that you need to perform in Enterprise Data Catalog, see the Axon Resource Properties topic in the *Catalog Administrator Guide*.

You can run a profile on resources in Enterprise Data Catalog and identify fields from the profile results that match data domains. You can link those data domains to Axon glossaries in Enterprise Data Catalog. If you link fields to a data domain in Enterprise Data Catalog, the fields appear on the **Fields** facet with the associated glossary name displayed in the **Inferred Glossary** column.

You can filter the information in the **Fields** facet by status type. You can search by the field name, parent name, linked glossary, or inferred glossary, and narrow down the search by selecting resources to search in. In the Parent Name field, Axon displays suggestions for table names along with the schema information for relational sources and path information for non-relational sources.

Integration Overview

You associate Axon objects with Enterprise Data Catalog assets. WebUsers see technical assets in Axon systems, glossaries, and data sets.

The following table lists the tasks that Axon users perform to view technical metadata:

Task	User Profile	Result
Provide the machine details of your Enterprise Data Catalog deployment when you install Axon.	Installer	Axon and Enterprise Data Catalog are integrated. Axon displays the resources from Enterprise Data Catalog in the Resources facet. For more information on installing Axon, see the <i>Informatica Axon 5.0 Installation Guide</i> .
Link Enterprise Data Catalog resources to one or more Axon systems.	Admin or SuperAdmin	Axon associates systems and resources and displays the linked resources in the Enterprise Catalog tab when you open the system object.
Link fields to attributes in data sets.	Admin or SuperAdmin	Axon displays the technical metadata from the fields in the Attributes tab when you open the data set object.
Ignore	Admin or SuperAdmin	Axon does not associate the fields in the Fields facet with the corresponding attributes in Enterprise Data Catalog. In Axon, the status of the ignored fields change from Reported to Ignored.

Linking Resources with Systems

Link Enterprise Data Catalog resources with Axon systems to view the resources in the **Fields** facet in Axon. You can add an existing system or create a system. You must have an admin profile to view the **Resources** facet. You must have an Enterprise Data Catalog account to view the resource details.

1. From the Axon toolbar, click **Enterprise Catalog** to view the **Resources** facet.
2. Review the resource details and select the rows that you want to link to Axon systems. To make multiple selections, hold the control key and click every row that you want to include.
3. Right-click a row and click **Manage Linking**.

The **Link Axon System(s)** dialog box opens.

The following image shows a sample system to which you can link a resource:

System Name *	Description	Type	Action
System_Automation_TM_01 ⌵ Create	This is an object created via Automation fo	Software Application	+ ×
Select System ⌵ Create			+ ×

4. In the **System Name** column, start typing the name of the system that you want to link to the rows that you selected.
Axon starts suggesting systems based on the keywords that you type.
5. Select the system from the list of suggestions that Axon makes.
Axon updates the **Description** and **Type** columns with information about the system that you selected.

6. Optionally, click **Create** to create a system.
 - a. Configure the required properties.
 - b. Click **Save**.
7. Optionally, click the **+** icon to add a row and link another system. You can add multiple systems to Enterprise Data Catalog resources.
8. Optionally, click the **X** icon to delete a row and remove an existing link.
9. Click **Save**.

Note: Axon lists a resource in the **Resources** facet even if you save the resource without running it or purge the resource in Enterprise Data Catalog. If you link the resource to a system, the **Fields** facet does not list the corresponding fields.

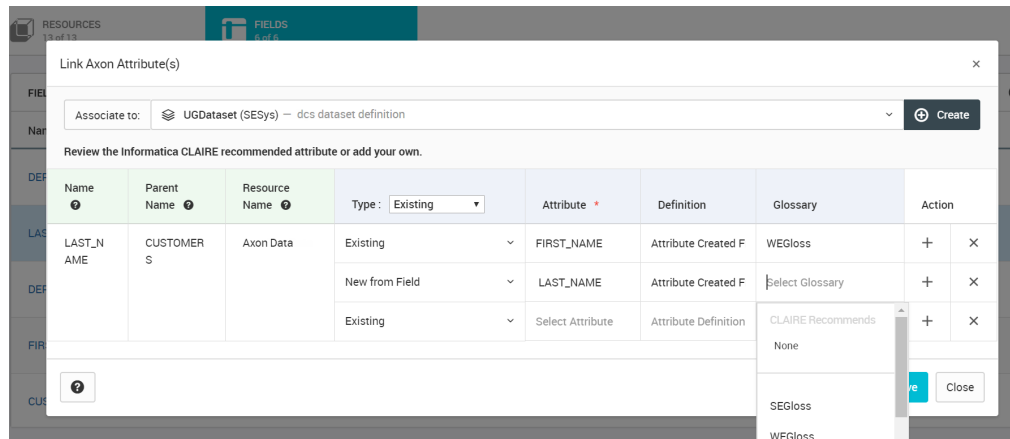
Linking Fields with Attributes

Link columns in Enterprise Data Catalog to data set attributes in Axon. You must have one of the administrator profile to view the **Fields** facet. You can set the status of columns that are not relevant to **Ignore**.

1. From the Axon toolbar, click **Enterprise Catalog** to view the **Fields** facet.
2. Review the field details and select the rows that you want to link to attributes in data sets. To make multiple selections, hold the control key and click the rows that you want to include.
3. Right-click a row and click **Manage Linking**. Optionally, click the drop-down menu next to the **Search** button and click **Manage Linking**.

The **Link Axon System(s)** dialog box opens.

The following image shows a sample attribute to which you can link a field:



4. In the **Associate to** field, select a data set attribute that you want to link the field. Informatica CLAIRE recommends attributes of the selected data set that you can link the fields to. You can also view the list of data set attributes available in Axon.
5. Optionally, click **Create** to create a data set.
 - a. In the **Create a Data Set** dialog box, specify values for the required properties.
 - b. Click **Save**.

- From the **Type** dropdown, select the link type.

Option	Description
Existing	Select an existing attribute of the data set.
New from Field	Create an attribute from the field information.

- Based on the type of link, Axon updates the **Attribute**, **Definition**, and **Glossary** columns.
If you select **New from Field**, Axon recommends a list of glossaries that you can associate with the attribute.
- Optionally, click the **+** icon to associate a new attribute to a field.
- Optionally, click the **X** icon to unlink the Axon data set attribute and the Enterprise Data Catalog field.
- Click **Save**.

Bulk Upload Templates

You can download predefined Microsoft Excel templates to bulk upload in Axon. You can also use custom Microsoft Excel templates to upload data to Axon. Informatica recommends that you use the templates that Axon provides.

You can use a comma-separated-value (CSV) file format to bulk upload data to Axon. You can use a CSV file that you created to upload data to Axon. If you want to use the Axon template, you need to download and save the Microsoft Excel template in the CSV format.

Use the bulk upload template when you need to perform the following tasks:

- Add new objects, relationships, and roles to Axon.
- Update existing objects, relationships, and roles to Axon.

Business & Change Object Templates

Use Business and Change object templates to explain different business functions and changes to objects in an organization. Download templates for Business and Change objects from Axon to perform a bulk upload.

You can bulk upload the following types of objects:

- Policy
- Project
- Process

Policy

Download the Policy template to bulk upload policies to Axon. You can choose to upload a new policy or update an existing policy.

Upload New Items

The following table describes the fields of the Policy template that you can use to upload new items:

Field	Type	Description
Policy Name	Required	Name of the policy. Enter a name that other Axon users can recognize easily.
Reference	Optional	Reference identifier for the policy. If you leave this field empty, Axon assigns a new reference automatically.
Internal	Required	Indicates whether the policy is internal or external.
URL	Optional	Link to another page where the policy is mentioned in detail.
Definition	Required	Definition of the policy.
Effective Date	Optional	The date from which the policy is effective. The effective date must be in the DD/MM/YYYY format.
End Date	Optional	The date after which the policy ceases to be effective. The end date must be in the DD/MM/YYYY format.
Parent Policy Name	Optional	Name of the parent policy if the policy belongs to a hierarchy.
Policy Lifecycle	Required	Stage of the policy in the approval lifecycle. You can select the following default stages: <ul style="list-style-type: none">- Proposed- Draft- Enforced- To Be Replaced You can also create policy lifecycle stages.
Policy Type	Required	Category that best describes the policy. You can select the following default policy types: <ul style="list-style-type: none">- Conduct Standards- Data Standards- Technical Standards- Technical Guidelines- Procedures You can also create policy types.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.

Field	Type	Description
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: <ul style="list-style-type: none"> - Policy Owner - Policy Steward - Policy Subject Matter Expert

Update Existing Items

The following table describes the fields of the Policy template that you can use to update existing items:

Field	Type	Description
Policy ID	Optional	ID for the policy.
Policy Name	Required	Name of the policy. Enter a name that other Axon users can recognize easily.
Reference	Optional	Reference identifier for the policy. If you leave this field empty, Axon assigns a new reference automatically.
Internal	Required	Indicates whether the policy is internal or external.
URL	Optional	Link to another page where the policy is mentioned in detail.
Definition	Required	Definition of the policy.
Effective Date	Optional	The date from which the policy is effective. The effective date must be in the DD/MM/YYYY format.
End Date	Optional	The date after which the policy ceases to be effective. The end date must be in the DD/MM/YYYY format.
Parent Policy Name	Optional	Name of the parent policy if the policy belongs to a hierarchy.
Policy Lifecycle	Required	Stage of the policy in the approval lifecycle. You can select the following default stages: <ul style="list-style-type: none"> - Proposed - Draft - Enforced - To Be Replaced You can also create policy lifecycle stages.
Policy Type	Required	Category that best describes the policy. You can select the following default policy types: <ul style="list-style-type: none"> - Conduct Standards - Data Standards - Technical Standards - Technical Guidelines - Procedures You can also create policy types.

Project

Download the Project template to bulk upload projects to Axon. You can choose to upload a new project or update an existing project.

Upload New Items

The following table describes the fields of the Project template that you can use to upload new items:

Field	Type	Description
Reference	Optional	Reference identifier for the project. If you leave this field empty, Axon assigns a new reference automatically.
Project Name	Required	Name of the project. Enter a name that other Axon users can recognize easily.
Project Description	Required	Description of the project.
Start Date	Required	Start date of the project. The start date must be in the DD/MM/YYYY format.
End Date	Required	End date of the project. The end date must be in the DD/MM/YYYY format.
Parent Project Name	Optional	Parent of the project that you create.
RAG	Required	Status of the project in the project management lifecycle. Select Red, Amber, or Green.
Classification	Optional	Classification of the project. Select whether you want to classify the project as a mandatory change or a discretionary change.
Project Lifecycle	Required	Stage of the project in the project management lifecycle. You can select the following default stages: <ul style="list-style-type: none">- Initiation- Planning- Execution- Closure- Closed You can also create project lifecycle stages.
Project Type	Required	Indicates the type of the project. Specify whether you want to create a program, a project within a program, a workstream within a project, or a workpackage within a project.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.

Field	Type	Description
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: <ul style="list-style-type: none"> - Project Sponsor - Project Manager - Project Steward - Project Stakeholder - Project Member

Update Existing Items

The following table describes the fields of the Project template that you can use to update existing items:

Field	Type	Description
Project ID	Optional	ID for the project.
Reference	Optional	Reference identifier for the project. If you leave this field empty, Axon assigns a new reference automatically.
Project Name	Required	Name of the project. Enter a name that other Axon users can recognize easily.
Project Description	Required	Description of the project.
Start Date	Required	Start date of the project. The start date must be in the DD/MM/YYYY format.
End Date	Required	End date of the project. The end date must be in the DD/MM/YYYY format.
Parent Project Name	Optional	Parent of the project that you create.
RAG	Required	Status of the project in the project management lifecycle. Select Red, Amber, or Green.
Classification	Optional	Classification of the project. Select whether you want to classify the project as a mandatory change or a discretionary change.
Project Lifecycle	Required	Stage of the project in the project management lifecycle. You can select the following default stages: <ul style="list-style-type: none"> - Initiation - Planning - Execution - Closure - Closed You can also create project lifecycle stages.
Project Type	Required	Indicates the type of the project. Specify whether you want to create a program, a project within a program, a workstream within a project, or a workpackage within a project.

Process

Download the Process template to bulk upload processes to Axon. You can choose to upload a new process or update an existing process.

Upload New Items

The following table describes the fields of the Process template that you can use to upload new items:

Field	Type	Description
Process Name	Required	Name of the process.
Reference	Optional	Reference identifier for the process. If you leave this field empty, Axon assigns a new reference automatically.
Description	Required	Description of the process.
Input Description	Optional	Description of relevant inputs to the process.
Output Description	Optional	Description of relevant outputs from the process.
Step Type	Required	Specify whether you are creating the starting step of a process, the ending step of a process, or a common step across the process.
Parent Process Name	Optional	Parent of the process.
Process Type	Required	The type of process that you create. Specify whether you are creating a complete process, a step within a process, or a control within a process.
Lifecycle	Required	Stage of the process in the approval lifecycle. You can select the following default stages: <ul style="list-style-type: none">- In Production- Being considered- Being Designed/Built- To be Replaced- Being Decommissioned- Decommissioned You can also create process lifecycle stages.
Classification	Optional	Classification of the process. You can classify into the following processes: Execution Process, Control Process, Quality Analysis Process, and Exception Process.
Automation	Optional	Level of automation. <ul style="list-style-type: none">- The Manual option means that the process requires human intervention at every stage of the workflow.- The Partially Automated option means that the process requires human intervention at some, but not all, stages of the workflow.- The Fully Automated option means that the process requires no human intervention at any stage of the workflow.

Field	Type	Description
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: <ul style="list-style-type: none"> - Process Owner - Process Steward - Process Executor - Process SME

Update Existing Items

The following table describes the fields of the Process template that you can use to update existing items:

Field	Type	Description
Process ID	Optional	ID of the process.
Process Name	Required	Name of the process.
Reference	Optional	Reference identifier for the process. If you leave this field empty, Axon assigns a new reference automatically.
Description	Required	Description of the process.
Input Description	Optional	Description of relevant inputs to the process.
Output Description	Optional	Description of relevant outputs from the process.
Step Type	Required	Specify whether you are creating the starting step of a process, the ending step of a process, or a common step across the process.
Parent Process Name	Optional	Parent of the process.
Process Type	Required	The type of process that you create. Specify whether you are creating a complete process, a step within a process, or a control within a process.

Field	Type	Description
Lifecycle	Required	<p>Stage of the process in the approval lifecycle.</p> <p>You can select the following default stages:</p> <ul style="list-style-type: none"> - In Production - Being considered - Being Designed/Built - To be Replaced - Being Decommissioned - Decommissioned <p>You can also create process lifecycle stages.</p>
Classification	Optional	<p>Classification of the process.</p> <p>You can classify into the following processes: Execution Process, Control Process, Quality Analysis Process, and Exception Process.</p>
Automation	Optional	<p>Level of automation.</p> <ul style="list-style-type: none"> - The Manual option means that the process requires human intervention at every stage of the workflow. - The Partially Automated option means that the process requires human intervention at some, but not all, stages of the workflow. - The Fully Automated option means that the process requires no human intervention at any stage of the workflow.

Data & Technology Object Templates

The Data & Technology Object templates contain the main Axon components that identify the systems and data present in an organization and how the systems relate to each other. You can use the data quality objects to control and measure the quality of customer data. Download templates for Data and Technology objects from Axon to perform a bulk upload.

You can bulk upload the following types of objects:

- DQ Report
- Attribute
- Attribute Values
- DQ Measure
- Data Set
- Interface
- Glossary
- System

DQ Report

Download the DQ Report template to bulk upload data quality reports to Axon. You can choose to upload a new DQ report or update an existing DQ report.

Upload New Items

The following table describes the fields of the DQ Report template that you can use to upload new items:

Field	Type	Description
Report Date	Required	The date when the evaluation of the data was performed in the DQ system. The date of the DQ report must be in the DD/MM/YYYY format. Do not enter the date when the reports are uploaded to Axon. You can upload multiple reports for the same item and multiple items at the same time.
DQ Result	Required	The score, expressed as a number between 0 and 100, of items that meet the expectations of the quality rule. Axon displays this number as a percentage. Do not use a % sign when entering data. You can enter scores expressed with decimal places. Most Axon screens round off the score with a decimal value.
DQ Report URL	Optional	Link to the full report generated by the DQ system.
Exception Count	Optional	The number of records that did not meet standards based on some DQ system reports. Specify the exception information.
Volume	Optional	Number of observations in the report.
DQ Measure Reference	Required	The unique reference number of the Local DQ rule.

Update Existing Items

The following table describes the fields of the DQ Report template that you can use to update existing items:

Field	Type	Description
DQ Report ID	Optional	ID of the DQ report.
Report Date	Required	The date when the evaluation of the data was performed in the DQ system. The date of the DQ report must be in the DD/MM/YYYY format. Do not enter the date when the reports are uploaded to Axon. You can upload multiple reports for the same item and multiple items at the same time.
DQ Result	Required	The score, expressed as a number between 0 and 100, of items that meet the expectations of the quality rule. Axon displays this number as a percentage. Do not use a % sign when entering data. You can enter scores expressed with decimal places. Most Axon screens round off the score with a decimal value.

Field	Type	Description
DQ Report URL	Optional	Link to the full report generated by the DQ system.
Exception Count	Optional	The number of records that did not meet standards based on some DQ system reports. Specify the exception information.
Volume	Optional	Number of observations in the report.
DQ Measure Reference	Required	The unique reference number of the Local DQ rule.

Attribute

Download the Attribute template to bulk upload attributes to Axon. You can choose to upload a new attribute or update an existing attribute.

Upload New Items

The following table describes the fields of the Attribute template that you can use to upload new items:

Field	Type	Description
Reference Number	Optional	The unique reference ID of the attribute. If the Reference Number column is empty, you need to remove the column mapping to the Reference Number field when you perform a bulk upload. Alternatively, you can choose to delete the Reference Number column from the template before you perform a bulk upload.
Attribute Name	Required	Name of the attribute as known in the business.
Attribute Definition	Required	Definition of the attribute.
DB Format	Optional	The data type of the attribute. For example, you can enter <code>DATE</code> for a date data type. Note: In the Map Columns step of bulk upload, if you do not specify a value for this field, Axon assigns the <code>VARCHAR(255)</code> data type by default.
Key	Optional	Indicates whether the attribute is a primary key.
Business Logic	Optional	Describes the relevant business logic for the attribute.
Attribute Requirement	Optional	Indicates if the field is mandatory, optional or conditional when a new row is created.
Attribute Data Set	Required	Reference to the data set that contains the attribute.
Attribute System	Optional	Short name of the system that contains the data set and the attribute.
Attribute Glossary Name	Required	The glossary reference that captures the attribute name.

Field	Type	Description
Attribute Glossary Parent Name	Optional	Parent of the glossary asset that captures the attribute in the glossary hierarchy. The parent glossary term must exist in Axon.
Origination	Optional	The origin of the attribute. You can select one of the following types: Created/Set Here, Sourced, or Unknown.
Editability	Optional	Describes whether you can edit the attribute. The following editability options are available: Read Only, Unknown, or Editable - Restricted to List / List with Free Text Override / Free Text.
Editability Role	Optional	The role of the user who can edit the attribute. The permitted roles are Admin Only, Most Users, and Restricted User Group.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: <ul style="list-style-type: none"> - Data Attribute Owner - Data Attribute Steward - DQ Attribute Steward - Data Attribute Business Subject Matter Expert - Data Attribute Technical Subject Matter Expert

Update Existing Items

The following table describes the fields of the Attribute template that you can use to update existing items:

Field	Type	Description
Attribute ID	Optional	ID of the attribute.
Reference Number	Optional	The unique reference ID of the attribute. If the Reference Number column is empty, you need to remove the column mapping to the Reference Number field when you perform a bulk upload. Or, you can choose to delete the Reference Number column from the template before you perform a bulk upload.
Attribute Name	Required	Name of the attribute as known in the business.

Field	Type	Description
Attribute Definition	Required	Definition of the attribute.
DB Format	Optional	The data type of the attribute. For example, you can enter <code>DATE</code> for a date data type. Note: In the Map Columns step of bulk upload, if you do not specify a value for this field, Axon assigns the <code>VARCHAR(255)</code> data type by default.
Key	Optional	Indicates whether the attribute is a primary key.
Business Logic	Optional	Describes the relevant business logic for the attribute.
Attribute Requirement	Optional	Indicates if the field is mandatory, optional or conditional when a new row is created.
Attribute Data Set	Required	Reference to the data set that contains the attribute.
Attribute System	Optional	Short name of the system that contains the data set and the attribute.
Attribute Glossary Name	Required	The glossary reference that captures the attribute name.
Attribute Glossary Parent Name	Optional	Parent of the glossary asset that captures the attribute in the glossary hierarchy. The parent glossary term must exist in Axon.
Origination	Optional	The origin of the attribute. You can select one of the following types: Created/Set Here, Sourced, or Unknown.
Editability	Optional	Describes whether you can edit the attribute. The following editability options are available: Read Only, Unknown, or Editable - Restricted to List / List with Free Text Override / Free Text.
Editability Role	Optional	The role of the user who can edit the attribute. The permitted roles are Admin Only, Most Users, and Restricted User Group.

Note:

- Make sure that the attributes you update already exist in Axon.
- In the template, enter the values in the correct format that is required by the fields. When you upload the template, Axon validates your entries and displays an error if the formats are incorrectly entered.

Attribute Values

Download the Attribute Values template to bulk upload values for Data Set attributes. You can choose to replace the existing values or add to the existing list of values.

Replace Existing Values

To replace the existing list of values for a Data Set attribute, perform the following steps:

1. Open the Data Set for which you want to upload attribute values, and go to the **Values** tab.
2. Click **Download Template** to download the template file.
3. Enter the values in the template file.

Note:

- The columns you see in the template file depend on the entries that you have made in the **Structure** section of the **Attributes** tab.
 - Do not modify the headers in the template.
 - Enter the values according to the format required by the headers. The format of the values you enter must match the format of the existing values.
4. In the **Values** tab of the Data Set, click **Choose File**, and select the template from your local machine.
 5. In the **Upload Type** field, select **Overwrite**.
 6. Click **Save**.

Axon erases all existing values for the Data Set attribute and creates new values from your template.

Add to Existing Values

To add new values to the existing values of a Data Set attribute, perform the following steps:

1. Open the Data Set for which you want to upload attribute values, and go to the **Values** tab.
2. Click **Download Template** to download the template file.
3. Enter the values in the template file.
 - The columns you see in the template file depend on the entries that you have made in the **Structure** section of the **Attributes** tab.
 - Do not modify the headers in the template.
 - Enter the values according to the format required by the headers. The format of the values you enter must match the format of the existing values.
4. In the **Values** tab of the Data Set, click **Choose File**, and select the template from your local machine.
5. In the **Upload Type** field, select **Append**.
6. Click **Save**.

Axon uploads the attribute values from your template and adds them to the list of existing values.

DQ Measure

Download the DQ Measure template to bulk upload data quality measures to Axon. You can upload new items for a DQ Measure object.

Upload New Items

The following table describes the fields of the DQ Measure template that you can use to upload new items:

Field	Type	Description
Rule Name	Required	Name of the rule.
Rule Description	Required	Description of the logic for the rule.
Reference	Optional	The unique reference number. Based on this reference number, Axon loads the scores in the DQ report.
Criticality	Required	Level of criticality. Select from one of the following options: <ul style="list-style-type: none">- Low- Medium- High
Technical Description	Optional	A technical description of the rule logic. Can include SQL or pseudo SQL.
Population Description	Optional	Describes the population in scope for the rule.
Measuring Method Description	Optional	The relevant information about the measurement process.
Amber Target	Required	A number from 0 to 100 that indicates the threshold value for the amber color.
Green Target	Required	A number that indicates the threshold value for the green color. Reflects the proportion of the measured data that achieved the performance level for the green target. Enter a number from 0 to 100. Do not enter characters such as %. Decimal Points are acceptable, although results are rounded. Some DQ measurement systems report deviation from a perfect score rather than stating the actual score. Do not enter the deviation percentage. If 5% deviation is reported, enter "95".
Measured in System	Required	Name of the system in which the rule is measured. This is often the name of the DQ profiling or measurement system used for the given data set.
Rule Type	Required	The type of rule that Axon supports. You can select one of the following types of DQ rules: <ul style="list-style-type: none">- Accuracy- Consistency- Validity- Timeliness- Integrity- Purity

Field	Type	Description
Frequency	Optional	Specifies how often the rule is measured. Select one of the following values: <ul style="list-style-type: none"> - Daily - Weekly - Monthly - Quarterly - AdHoc - Bi-Weekly
Measuring Method	Optional	Specifies how the DQ rule is evaluated. You can specify one of the following options: <ul style="list-style-type: none"> - System Function - Technical Script - Business Extract
Automation Level	Optional	Specifies how automated the DQ measurement process is. Select one of the following options: <ul style="list-style-type: none"> - Fully Automated - Partially Automated - Manual - Unknown
Strategic DQ Measure Reference	Optional	The reference to the Strategic DQ Measure that is attached to a glossary term and specifies how to validate the data related to the glossary.
Attribute Name	Required	Name of the attribute that the rule measures.
Attribute Data Set Name	Optional	Name of the data set that contains the attribute.
Attribute Data Set System Name	Optional	Short name of the system that contains the data set and the attribute.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: <ul style="list-style-type: none"> - DQ Steward - DQ Business Subject Matter Expert - DQ Technical Subject Matter Expert

Data Set

Download the Data Set template to bulk upload data sets to Axon. You can choose to upload a new data set or update an existing data set.

Upload New Items

The following table describes the fields of the Data Set template that you can use to upload new items:

Field	Type	Description
Reference Number	Optional	The unique identifier for the data set.
Data Set Name	Required	Name of the data set as known in the business.
Data Set Definition	Required	Description of the data set.
Data Set Usage Description	Optional	Additional information about the data set.
Data Set Type	Required	Type of the data set. You can select the following data set types: <ul style="list-style-type: none">- Value List- Data Set- Document- Report- Message Default is Data Set.
System Name	Required	Short name of the system that contains the data set.
Lifecycle	Required	Stage of the data set in the governance lifecycle. You can select the following default stages: <ul style="list-style-type: none">- Draft- Confirmed- Governed You can also create lifecycle stages.
Glossary Name	Required	The glossary that the data set is associated with.
Glossary Parent Name	Optional	Parent of the glossary asset in the glossary hierarchy. The parent glossary term must exist in Axon.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.

Field	Type	Description
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles. <ul style="list-style-type: none"> - Data Steward - Data Business Subject Matter Expert - Data Technical Subject Matter Expert - Data Owner

Update Existing Items

The following table describes the fields of the Data Set template that you can use to update existing items:

Field	Type	Description
Data Set ID	Optional	ID of the data set.
Reference Number	Optional	The unique identifier for the data set.
Data Set Name	Required	Name of the data set as known in the business.
Data Set Definition	Required	Description of the data set.
Data Set Usage Description	Optional	Additional information about the data set.
Data Set Type	Required	Type of the data set. You can select the following data set types: <ul style="list-style-type: none"> - Value List - Data Set - Document - Report - Message Default is Data Set.
System Name	Required	Short name of the system that contains the data set.
Lifecycle	Required	Stage of the data set in the governance lifecycle. You can select the following default stages: <ul style="list-style-type: none"> - Draft - Confirmed - Governed You can also create lifecycle stages.
Glossary Name	Required	The glossary that the data set is associated with.
Glossary Parent Name	Optional	Parent of the glossary asset in the glossary hierarchy. The parent glossary term must exist in Axon.

Interface

Download the Interface template to bulk upload interfaces to Axon. You can choose to upload a new interface object or update an existing interface object.

Upload New Items

The following table describes the fields of the Interface template that you can use to upload new items:

Field	Type	Description
Interface Name	Required	Name of the interface.
Reference	Optional	Reference ID for the interface. The reference ID must be a string data type. If you enter a number, you must format the column to Text type. Otherwise, Microsoft Excel alters the reference ID by deleting trailing zeros.
Asset ID	Optional	A unique identifier or a serial number for a system or an interface that the IT or Property department assigns.
Synchronisation Control	Optional	Description of the rules that control the synchronization of information between the two connected interfaces.
Interface Description	Required	Description of the system interface.
Transfer Method	Optional	Protocol or medium used to move information between the source and target system. You can select the following methods: FTP, SFTP, SCP, HTTP, HTTPS, SOAP, MQSERIES, or EMAIL.
Transfer Format	Optional	Format or file type used to flow information between the source and target system. You can select the following formats: XML, XBRL, JSON, Delimited, or XLS.
Interface Classification	Optional	Classification of the system interface that best describes its purpose. You can select the following default interfaces: - BAU - Reconciliation - Ref Data Distribution - Migration You can also create interface classifications.
Lifecycle	Required	Stage of the system interface in the production lifecycle. You can select the following default stages: - In Production - Being Considered - Being Designed/ Built - To Be Replaced - Being Decommissioned - Decommissioned You can also create lifecycle stages.
Source System Name	Required	System or data set from which the information flows out.

Field	Type	Description
Target System Name	Required	System or data set to which the information flows in.
Automation Level	Required	Level of automation of the interface. You can select the following the automation levels: <ul style="list-style-type: none"> - Manual - File based - Manual - Re-keyed - Partially Automated - Fully Automated - Unknown Default is Unknown.
Frequency	Optional	Frequency at which data flows between the source and target system. You can select the following frequencies: <ul style="list-style-type: none"> - Ad-Hoc - Monthly - Weekly - Daily - Realtime - Unknown - Yearly - Semi-Annually - Quarterly
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles. <ul style="list-style-type: none"> - Interface Business Owner - Interface IT Owner - Interface Business Subject Matter Expert - Interface Technical Subject Matter Expert

Update Existing Items

The following table describes the fields of the Interface template that you can use to update existing items:

Field	Type	Description
Interface ID	Optional	ID of the interface.
Interface Name	Required	Name of the interface.

Field	Type	Description
Reference	Optional	Reference ID for the interface. The reference ID must be a string data type. If you enter a number, you must format the column to Text type. Otherwise, Microsoft Excel alters the reference ID by deleting trailing zeros.
Asset ID	Optional	A unique identifier or a serial number for a system or an interface that the IT or Property department assigns.
Synchronisation Control	Optional	Description of the rules that control the synchronization of information between the two connected interfaces.
Interface Description	Required	Description of the system interface.
Transfer Method	Optional	Protocol or medium used to move information between the source and target system. You can select the following methods: FTP, SFTP, SCP, HTTP, HTTPS, SOAP, MQSERIES, or EMAIL.
Transfer Format	Optional	Format or file type used to flow information between the source and target system. You can select the following formats: XML, XBRL, JSON, Delimited, or XLS.
Interface Classification	Optional	Classification of the system interface that best describes its purpose. You can select the following default interfaces: - BAU - Reconciliation - Ref Data Distribution - Migration You can also create interface classifications.
Lifecycle	Required	Stage of the system interface in the production lifecycle. You can select the following default stages: - In Production - Being Considered - Being Designed/ Built - To Be Replaced - Being Decommissioned - Decommissioned You can also create lifecycle stages.
Source System Name	Required	System or data set from which the information flows out.
Target System Name	Required	System or data set to which the information flows in.

Field	Type	Description
Automation Level	Required	Level of automation of the interface. You can select the following the automation levels: <ul style="list-style-type: none"> - Manual - File based - Manual - Re-keyed - Partially Automated - Fully Automated - Unknown Default is Unknown.
Frequency	Optional	Frequency at which data flows between the source and target system. You can select the following frequencies: <ul style="list-style-type: none"> - Ad-Hoc - Monthly - Weekly - Daily - Realtime - Unknown - Yearly - Semi-Annually - Quarterly

Glossary

Download the Glossary template to bulk upload glossaries to Axon. You can choose to upload a new glossary or update an existing glossary.

Upload New Items

The following table describes the fields of the Glossary template that you can use to upload new items:

Field	Type	Description
Glossary Name	Required	Name of the glossary asset.
Glossary Definition	Required	Definition of the glossary asset.
Examples	Optional	Contextual examples of the glossary asset.
Business Logic	Optional	Business context in which the glossary is used.
Format Description	Optional	Description of the glossary format.
LDM Reference	Optional	Place of the glossary asset in the Logical Data Model.
Parent Glossary Name	Optional	Parent of the glossary asset in the glossary hierarchy. The parent glossary term must exist in Axon.

Field	Type	Description
Lifecycle	Required	Stage of the glossary in the approval lifecycle. You can select the following default stages: <ul style="list-style-type: none"> - Proposed - Being validated - Awaiting Approval - Approved - Being Phased Out You can also create lifecycle stages.
Format Type	Required	Format in which the glossary asset is expressed. You can select the following data types: Text, Number, Decimal, Percentage, Fraction, Date, Time, or Datetime.
Security Classification	Required	Security classification of the glossary asset. Specify whether the glossary is public, internal, confidential, or secret. You can also create security classifications.
Glossary Type	Required	The type of glossary asset. Specify whether the glossary asset refers to an entity, a domain, or a business term.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: <ul style="list-style-type: none"> - Glossary Definition Owner - Glossary Steward - Glossary Subject Matter Expert - Strategic Data Owner - Data Quality Steward

Update Existing Items

The following table describes the fields of the Glossary template that you can use to update existing items:

Field	Type	Description
Glossary ID	Optional	ID of the glossary.
Glossary Name	Required	Name of the glossary asset.
Glossary Definition	Required	Definition of the glossary asset.
Examples	Optional	Contextual examples of the glossary asset.

Field	Type	Description
Business Logic	Optional	Business context in which the glossary is used.
Format Description	Optional	Description of the glossary format.
LDM Reference	Optional	Place of the glossary asset in the Logical Data Model.
Parent Glossary Name	Optional	Parent of the glossary asset in the glossary hierarchy. The parent glossary term must exist in Axon.
Lifecycle	Required	Stage of the glossary in the approval lifecycle. You can select the following default stages: <ul style="list-style-type: none"> - Proposed - Being validated - Awaiting Approval - Approved - Being Phased Out You can also create lifecycle stages.
Format Type	Required	Format in which the glossary asset is expressed. You can select the following data types: Text, Number, Decimal, Percentage, Fraction, Date, Time, or Datetime.
Security Classification	Required	Security classification of the glossary asset. Specify whether the glossary is public, internal, confidential, or secret. You can also create security classifications.
Glossary Type	Required	The type of glossary asset. Specify whether the glossary asset refers to an entity, a domain, or a business term.

System

Download the System template to bulk upload systems to Axon. You can choose to upload a new system or update an existing system.

Upload New Items

The following table describes the fields of the System template that you can use to upload new items:

Field	Type	Description
System Name	Required	Short name of the system. Enter a name that other Axon users can recognize easily.
System Long Name	Optional	Full name or long name of the system.
Asset ID	Optional	A unique identifier for the system or the interface. The IT or Property department designates the Asset ID.
External	Required	A flag for systems that are not owned or controlled by the client organization from which a data feed is taken. Select True or False.

Field	Type	Description
CIA Rating	Optional	<p>Confidentiality, Integrity and Availability (CIA) rating of the system.</p> <p>Confidentiality, Integrity and Availability are crucial elements of your system's security.</p> <ul style="list-style-type: none"> - Confidentiality: The system's ability to show the right information to the right users who have the right credentials. - Integrity: The system's ability to ensure that the information shown to the users have not been compromised. - Availability: The system's ability to show the right information to the right users at the right time. <p>This rating indicates the security assessment of your system.</p> <ul style="list-style-type: none"> - 1 indicates weak security (less secure). - 2 indicates average security (moderately secure). - 3 indicates strong security (most secure). <p>Each of the CIA elements is rated from 1 to 3. The value you select here is a composite rating of all three elements. For example, a rating of 213 means that:</p> <ul style="list-style-type: none"> - Confidentiality is rated at 2 (moderately secure). - Integrity is rated at 1 (less secure). - Availability is rated at 2 (most secure).
System Description	Required	Description of the system and the business purpose.
System URL	Optional	Link to another page where related information is mentioned.
Parent System Name	Optional	Parent name of the system if the system belongs to a hierarchy.
Lifecycle	Required	<p>Stage of the system in the production lifecycle.</p> <p>You can select the following default stages:</p> <ul style="list-style-type: none"> - In Production - Being considered - Being Designed/Built - To be Replaced - Being Decommissioned - Decommissioned <p>You can also create lifecycle stages.</p>
System Type	Required	Whether the system is a software application or one of several file types. You also need to specify whether the system is hosted internally inside your organization or externally outside your organization.
System Classification	Optional	<p>Classification of the system that best describes its function, for example, Sales Reporting.</p> <p>You can classify a system into the following default types:</p> <ul style="list-style-type: none"> - Document Management Platform - Collateral Management Platform - Order Management Platform - Credit Risk Platform - Market Risk Platform - Operational Risk Platform - Conduct Risk Platform <p>You can also create system classifications.</p>

Field	Type	Description
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: <ul style="list-style-type: none"> - System Business Owner - System IT Owner - System Business Subject Matter Expert - System Technical Subject Matter Expert - System Data Subject Matter Expert

Update Existing Items

The following table describes the fields of the System template that you can use to update existing items:

Field	Type	Description
System ID	Optional	ID of the system.
System Name	Required	Short name of the system. Enter a name that other Axon users can recognize easily.
System Long Name	Optional	Full name or long name of the system.
Asset ID	Optional	A unique identifier for the system or the interface. The IT or Property department designates the Asset ID.
External	Required	A flag for systems that are not owned or controlled by the client organization from which a data feed is taken. Select True or False.

Field	Type	Description
CIA Rating	Optional	<p>Confidentiality, Integrity and Availability (CIA) rating of the system.</p> <p>Confidentiality, Integrity and Availability are crucial elements of your system's security.</p> <ul style="list-style-type: none"> - Confidentiality: The system's ability to show the right information to the right users who have the right credentials. - Integrity: The system's ability to ensure that the information shown to the users have not been compromised. - Availability: The system's ability to show the right information to the right users at the right time. <p>This rating indicates the security assessment of your system.</p> <ul style="list-style-type: none"> - 1 indicates weak security (less secure). - 2 indicates average security (moderately secure). - 3 indicates strong security (most secure). <p>Each of the CIA elements is rated from 1 to 3. The value you select here is a composite rating of all three elements. For example, a rating of 213 means that:</p> <ul style="list-style-type: none"> - Confidentiality is rated at 2 (moderately secure). - Integrity is rated at 1 (less secure). - Availability is rated at 2 (most secure).
System Description	Required	Description of the system and the business purpose.
System URL	Optional	Link to another page where related information is mentioned.
Parent System Name	Optional	Parent name of the system if the system belongs to a hierarchy.
Lifecycle	Required	<p>Stage of the system in the production lifecycle.</p> <p>You can select the following default stages:</p> <ul style="list-style-type: none"> - In Production - Being considered - Being Designed/Built - To be Replaced - Being Decommissioned - Decommissioned <p>You can also create lifecycle stages.</p>

Field	Type	Description
System Type	Required	Whether the system is a software application or one of several file types. You also need to specify whether the system is hosted internally inside your organization or externally outside your organization.
System Classification	Optional	<p>Classification of the system that best describes its function, for example, Sales Reporting.</p> <p>You can classify a system into the following default types:</p> <ul style="list-style-type: none"> - Document Management Platform - Collateral Management Platform - Order Management Platform - Credit Risk Platform - Market Risk Platform - Operational Risk Platform - Conduct Risk Platform <p>You can also create system classifications.</p>

Organizational Object Templates

Use Organizational object templates to explain the different functions of an organization. Download templates for Organizational objects from Axon to perform a bulk upload.

You can bulk upload the following types of objects:

- Business Area
- Capability
- Legal
- Product
- People
- Org Unit

Business Area

Download the Business Area template to bulk upload business area data to Axon. You can choose to upload a new business area object or update an existing business area object.

Upload New Items

The following table describes the fields of the Business Area template that you can use to upload new items:

Field	Type	Description
Business Area Name	Required	Name of the business area.
Description	Required	Description of the business area.
Parent Business Area	Optional	Parent name of the business area if the business area belongs to a hierarchy.

Field	Type	Description
Lifecycle	Required	Stage of the business area in the governance lifecycle. You can select the following default stages: - Proposed - Operating - Retired You can also create the lifecycle stages.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: - Business Area Head - Business Area Subject Matter Expert

Update Existing Items

The following table describes the fields of the Business Area template that you can use to update existing items:

Field	Type	Description
Business Area ID	Optional	ID of the business area.
Business Area Name	Required	Name of the business area.
Description	Required	Description of the business area.
Parent Business Area	Optional	Parent name of the business area if the business area belongs to a hierarchy.
Lifecycle	Required	Stage of the business area in the governance lifecycle. You can select the following default stages: - Proposed - Operating - Retired You can also create the lifecycle stages.

Capability

Download the Capability template to bulk upload capabilities to Axon. You can choose to upload a new capability or update an existing capability.

Upload New Items

The following table describes the fields of the Capability template that you can use to upload new items:

Field	Type	Description
Reference	Optional	A unique identifier for the capability.
Capability Name	Required	Name of the capability.
Capability Definition	Required	Description of the capability.
Parent Capability	Optional	Parent name of the capability if the capability belongs to a hierarchy.
Classification	Optional	Classification of the capability that best describes its purpose. You can classify the capability into the following default types: <ul style="list-style-type: none">- Regulatory Capability- Organisational Capability- Senior Management Regime- PRA - Prescribed Responsibilities- FCA Key Functions- Significant Harm Function You can also create classification types.
Lifecycle	Required	Stage of the capability in the approval lifecycle. You can select one of the following default stages: <ul style="list-style-type: none">- In Effect- Being Proposed- Retired You can also create lifecycle stages.
Capability Type	Required	Type of capability that best describes the object. Specify whether the object is a capability or a responsibility.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: <ul style="list-style-type: none">- Capability Executive Head- Capability Non-Executive Head

Update Existing Items

The following table describes the fields of the Capability template that you can use to update existing items:

Field	Type	Description
Capability ID	Optional	ID of the capability.
Reference	Optional	A unique identifier for the capability.
Capability Name	Required	Name of the capability.
Capability Definition	Required	Description of the capability.
Parent Capability	Optional	Parent name of the capability if the capability belongs to a hierarchy.
Classification	Optional	Classification of the capability that best describes its purpose. You can classify the capability into the following default types: <ul style="list-style-type: none">- Regulatory Capability- Organisational Capability- Senior Management Regime- PRA - Prescribed Responsibilities- FCA Key Functions- Significant Harm Function You can also create classification types.
Lifecycle	Required	Stage of the capability in the approval lifecycle. You can select one of the following default stages: <ul style="list-style-type: none">- In Effect- Being Proposed- Retired You can also create lifecycle stages.
Capability Type	Required	Type of capability that best describes the object. Specify whether the object is a capability or a responsibility.

Legal

Download the Legal template to bulk upload legal data to Axon. You can choose to upload a new legal object or update an existing legal object.

Upload New Items

The following table describes the fields of the Legal template that you can use to upload new items:

Field	Type	Description
Short Name	Required	Short name of the legal object. Enter a name that other Axon users can recognize easily.
Long Name	Required	Full name of the legal object.
Description	Optional	Description of the legal object.

Field	Type	Description
Parent Short Name	Optional	Short name of the parent of the legal object.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: - Entity Head Legal Counselor - Entity Legal Subject Matter Expert

Update Existing Items

The following table describes the fields of the Legal template that you can use to update existing items:

Field	Type	Description
Legal ID	Optional	ID of the legal object.
Short Name	Required	Short name of the legal object. Enter a name that other Axon users can recognize easily.
Long Name	Required	Full name of the legal object.
Description	Optional	Description of the legal object.
Parent Short Name	Optional	Short name of the parent of the legal object.

Product

Download the Product template to bulk upload products to Axon. You can choose to upload a new product or update an existing product.

Upload New Items

The following table describes the fields of the Product template that you can use to upload new items:

Field	Type	Description
Product Name	Required	Short name of the product. Enter a name that other Axon users can recognize easily.
Long Name	Optional	Full name of the product.
Product Description	Required	Description of the product.

Field	Type	Description
Parent Product	Optional	Parent name of the product if the product belongs to a hierarchy.
Lifecycle	Required	Stage of the product in the governance lifecycle. Select one of the following default stages: - In Production - Being Considered You can also create lifecycle stages.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Optional	The role of the user. You can select the following roles: - Product Owner - Product Steward

Update Existing Items

The following table describes the fields of the Product template that you can use to update existing items:

Field	Type	Description
Product ID	Optional	ID of the product.
Product Name	Required	Short name of the product. Enter a name that other Axon users can recognize easily.
Long Name	Optional	Full name of the product.
Product Description	Required	Description of the product.
Parent Product	Optional	Parent name of the product if the product belongs to a hierarchy.
Lifecycle	Required	Stage of the product in the governance lifecycle. Select one of the following default stages: - In Production - Being Considered You can also create lifecycle stages.

People

Download the People template to bulk upload people data to Axon. Before you can create People objects, you must create the necessary Org Unit objects.

Upload New Items

The following table describes the fields of the People template that you can use to upload new items:

Field	Type	Description
First Name	Required	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
Last Name	Required	Last name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
Function	Optional	Job title or role of the user.
Function Description	Optional	Job description of the role of the user.
Description	Optional	Description about the user.
Email	Required	Email address of the user. Must be unique. Axon sends emails to this address.
Password	Optional	A password to provide access to the user. The user can change the password later. Not required if you enable Single Sign-On authentication.
Org Unit Reference	Required	The reference identifier of the organizational unit that the user is associated with.
Profile	Required	A user profile that controls the tasks that the user can perform and the objects that the user can view. Select one of the following user profiles: <ul style="list-style-type: none">- WebUser- Admin- SuperAdmin- Data Importer
Office Location	Optional	Office location of the user.
Internal Mail Code	Optional	Internal office mail code of the user.
Office Telephone	Optional	Office phone number of the user.
Mobile/Cell	Optional	Mobile phone number of the user.
LAN ID	Optional	Network ID of the user. LAN ID might be required if you want to enable Single Sign-On authentication. If the LAN ID column is empty, you must not map the LAN ID column of the template to any field in the Axon Field column when you perform a bulk upload.

Field	Type	Description
Employment Type	Required	The type of employment of the user. Specify whether the employment of the user is external or internal.
Lifecycle	Required	The status of the employment of the user. You can select one of the following default statuses: <ul style="list-style-type: none"> - Working - Temporarily Inactive - Pending Deactivation - Left the Company You can also create statuses.

Org Unit

Download the Org Unit template to bulk upload organizational units to Axon. You can choose to upload a organizational unit or update an organizational unit.

Upload New Items

The following table describes the fields of the Org Unit template that you can use to upload new items:

Field	Type	Description
Org Unit Name	Required	Name of the local department, team, or unit.
Description	Optional	Relevant description about the organizational unit.
Reference	Required	Reference identifier for the organizational unit. The reference ID must be a string data type. If you enter a number, you must format the column to Text type. Otherwise, Microsoft Excel alters the reference ID by deleting trailing zeros.
Parent Org Unit Reference	Optional	Parent of the organizational unit if the organization belongs to a hierarchy. The parent record must exist in Axon.
Axon Status	Required	The status of the org unit. You can select the following default values: <ul style="list-style-type: none"> - Active - Inactive - Pending - Review - Obsolete - Deleted You can customize the values if required.

Update Existing Items

The following table describes the fields of the Org Unit template that you can use to update existing items:

Field	Type	Description
Org Unit ID	Optional	ID of the organizational unit.
Org Unit Name	Required	Name of the local department, team, or unit.
Description	Optional	Relevant description about the organizational unit.
Reference	Required	Reference identifier for the organizational unit. The reference ID must be a string data type. If you enter a number, you must format the column to Text type. Otherwise, Microsoft Excel alters the reference ID by deleting trailing zeros.
Parent Org Unit Reference	Optional	Parent of the organizational unit if the organization belongs to a hierarchy. The parent record must exist in Axon.
Axon Status	Required	The status of the org unit. You can select the following default values: <ul style="list-style-type: none">- Active- Inactive- Pending- Review- Obsolete- Deleted You can customize the values if required.

Relationship Templates

Use Relationship templates to explain how one object is linked to the other object. Download templates for Relationships from Axon to perform a bulk upload.

You can bulk upload the following types of relationships:

- Process X System
- Policy X Project
- Policy X Business Area
- System X Glossary
- Glossary X Glossary
- Project X System
- Process X Process
- Business Area X Process
- Attribute X Attribute
- Policy X Process
- Capability X Process
- Policy X Glossary
- Process X Legal

- People X People
- Glossary X Project
- System X Product
- Process X Glossary
- Interface X Glossary

Process X System

Download the Process X System relationship template to bulk upload the relationships between a process and system.

The following table describes the fields of the Process X System relationship template:

Field	Type	Description
Process Name	Required	Name of the process. Enter a name that other Axon users can recognize easily.
Process Parent Name	Optional	Name of the parent process if the process belongs to a hierarchy.
System Name	Required	Short name of a system or an acronym that other Axon users can recognize easily for a system.
Parent System Name	Optional	Name of the parent system if the system belongs to a hierarchy.
Rel. Type	Required	The type of relationship between the process and system. Select Process is applicable to System .

Policy X Project

Download the Policy X Project relationship template to bulk upload the relationships between a policy and project.

The following table describes the fields of the Policy X Project relationship template:

Field	Type	Description
Rel. Description	Optional	Description about the relationship between the policy and project.
Policy Name	Required	Name of the policy. Enter a name that other Axon users can recognize easily.
Policy Parent Name	Optional	Parent of the policy if the policy belongs to a hierarchy.
Project Name	Required	Name of the project. Enter a name that users can recognize easily.
Parent Project Name	Optional	Parent of the project if the project belongs to a hierarchy.
Rel. Type	Required	The type of relationship between the policy and project. Specify that the policy is relevant to the project.

Policy X Business Area

Download the Policy X Business Area relationship template to bulk upload the relationships between a policy and business area.

The following table describes the fields of the Policy X Business Area relationship template:

Field	Field	Description
Policy Name	Required	Name of the policy. Enter a name that other Axon users can recognize easily.
Policy Parent Name	Optional	Parent of the policy if the policy belongs to a hierarchy.
Business Area Name	Required	Name of the business area. Enter a name that other Axon users can recognize easily.
Parent Business Area Name	Optional	Parent name of the business area if the business area belongs to a hierarchy.
Rel. Type	Required	The type of relationship between the policy and business area. Specify whether the policy is owned by the business area or the policy is a training requirement for the business area.

System X Glossary

Download the System X Glossary relationship template to bulk upload the relationships between a system and glossary.

The following table describes the fields of the System X Glossary relationship template:

Field	Type	Description
Glossary Name	Required	Name of the glossary.
Glossary Parent Name	Optional	Parent of the glossary term. The glossary parent name must exist in Axon.
System Name	Required	Short name of a system or an acronym that other Axon users can recognize easily for a system.
Strategic Data Item	Optional	The name of the data set that acts as a strategic data item.
Strategic Data Item System	Optional	The name of the system that contains the data set that acts as a strategic data item.
Rel. Type	Required	. The type of relationship between the system and glossary. Select one of the following types: - Strategic Master Source for - Expected glossary item coverage

Glossary X Glossary

Download the Glossary X Glossary relationship template to bulk upload the relationships between glossaries.

The following table describes the fields of the Glossary X Glossary relationship template:

Field	Type	Description
Source Glossary Name	Required	Name of the source glossary.
Source Glossary Parent Name	Optional	Parent name of the source glossary. The source glossary parent name must exist in Axon.
Target Glossary Name	Required	Name of the target glossary.
Target Glossary Parent Name	Optional	Parent name of the target glossary. The target glossary parent name must exist in Axon.
Rel. Type	Required	The type of relationship between the source and target glossaries. You can select the following default relationship types: <ul style="list-style-type: none">- Is Related to- Is Identified by- Is Specialism of- Is Described by- Is Classified by- Is Made up of You can also create relationship types if required.

Project X System

Download the Project X System relationship template to bulk upload the relationships between a project and system.

The following table describes the fields of the Project X System relationship template:

Field	Type	Description
Rel. Description	Optional	Description about the relationship between the project and system.
Project Name	Required	Name of the project. Enter a name that other Axon users can recognize easily.
Parent Project Name	Optional	Parent project of the project if the project belongs to a hierarchy.
System Name	Required	Short name of a system or an acronym that other Axon users can recognize easily for a system.
Rel. Type	Required	The type of relationship between the project and system. Select whether the project is building a new system, the project is decommissioning the system, the project is affecting the system, or project sources data from the system.

Process X Process

Download the Process X Process relationship template to bulk upload the relationships between processes.

The following table describes the fields of the Process X Process relationship template:

Field	Type	Description
Process Name	Required	Name of the process.
Process Parent Name	Optional	Parent of the process.
Predecessor Process Name	Required	Name of the predecessor process.
Predecessor Process Parent Name	Optional	Parent of the predecessor process.

Business Area X Process

Download the Business Area X Process relationship template to bulk upload the relationships between a business area and process.

The following table describes the fields of the Business Area X Process relationship template:

Field	Type	Description
Rel. Description	Optional	Description of the relationship between the business area and process.
Process Name	Required	Name of the process. Enter a name that other Axon users can recognize easily.
Process Parent Name	Optional	Name of the parent process if the process belongs to a hierarchy.
Business Area Name	Required	Name of the business area. Enter a name that other Axon users can recognize easily.
Business Parent Area Name	Optional	Parent name of the business area if the business area belongs to a hierarchy.
Rel. Type	Required	The type of relationship between the business area and process. Select Process is relevant for Business Area .

Attribute X Attribute

Download the Attribute X Attribute relationship template to bulk upload the relationships between attributes.

The following table describes the fields of the Attribute X Attribute relationship template:

Field	Type	Description
Sourcing Logic	Optional	Indicates the logic that is applied to the flow of data. For example, selections or transformations performed.
Sourcing Type	Required	The type of sourcing for the attribute. Specify whether the sourcing type is enforced lookup, unenforced lookup, or sourced from.
Target Attribute Name	Required	Name of the target attribute.
Target Data Set Name	Optional	Name of the target data set that contains the attribute.
Target System Name	Optional	Short name of the target system that contains the data set and the attribute.
Source Attribute Name	Required	Name of the source attribute.
Source Data Set Name	Optional	Name of the source data set that contains the attribute.
Source System Name	Optional	Short name of the source system that contains the data set and the attribute.
Scope of Data	Optional	The actual scope of data. Specify if you want all the data or a subset of data.
Interface Name	Optional	Name of the system interface. If you specify the Interface Name field, you need to fill in the Interface Source System and Interface Target System fields.
Interface Source System	Optional	System from which the information flows out.
Interface Target System	Optional	System to which the information flows in.

Policy X Process

Download the Policy X Process relationship template to bulk upload the relationships between a policy and process.

The following table describes the fields of the Policy X Process relationship template:

Field	Type	Description
Rel. Description	Optional	Description about the relationship between the policy and process.
Policy Name	Required	Name of the policy. Enter a name that other Axon users can recognize easily.

Field	Type	Description
Policy Parent Name	Optional	Parent name of the policy if the policy belongs to a hierarchy.
Process Name	Required	Name of the process.
Parent Process Name	Optional	Parent name of the process if the process belongs to a hierarchy.
Rel. Type	Required	The type of relationship between the policy and process. Specify that the policy regulates the process.

Capability X Process

Download the Capability X Process relationship template to bulk upload the relationships between a capability and process.

The following table describes the fields of the Capability X Process relationship template:

Field	Type	Description
Process Name	Required	Name of the process. Enter a name that other Axon users can recognize easily.
Process Parent Name	Optional	Name of the parent process if the process belongs to a hierarchy.
Capability Name	Required	Name of the capability.
Capability Parent Name	Optional	Parent of the capability. The capability parent name must exist in Axon.
Rel. Type	Optional	The type of relationship between the capability and process. Select Is Supporting the Capability .

Policy X Glossary

Download the Policy X Glossary relationship template to bulk upload the relationships between a policy and glossary.

The following table describes the fields of the Policy X Glossary relationship template:

Field	Type	Description
Rel. Description	Optional	Description about the relationship between the policy and glossary.
Policy Name	Required	Name of the policy. Enter a name that other Axon users can recognize easily.
Policy Parent Name	Optional	Parent name of the policy if the policy belongs to a hierarchy.
Glossary Name	Required	Name of the glossary.

Field	Type	Description
Parent Glossary Name	Optional	Parent name of the glossary term. The glossary parent name must exist in Axon.
Rel. Type	Required	The type of relationship between the policy and glossary. Specify that the policy regulates the glossary.

Process X Legal

Download the Process X Legal relationship template to bulk upload the relationships between a process and legal entity.

The following table describes the fields of the Process X Legal relationship template:

Field	Type	Description
Process Name	Required	Name of the process. Enter a name that other Axon users can recognize easily.
Process Parent Name	Optional	Name of the parent process if the process belongs to a hierarchy.
Legal Short Name	Required	Short name of the legal entity. Enter a name that other Axon users can recognize easily.
Parent Legal Short Name	Optional	Name of the parent legal entity if the legal entity belongs to a hierarchy.
Rel. Type	Required	The type of relationship between the process and legal entity. Select one of the following types: <ul style="list-style-type: none"> - Legal entity is Data Controller - Legal Entity is Data Processor

People X People

Download the People X People relationship template to bulk upload the relationships between an employee and manager.

The following table describes the fields of the People X People relationship template:

Field	Type	Description
Manager Email	Optional	Email address of the manager of the employee.
Manager First Name	Optional	First name of the manager of the employee.
Manager Last Name	Optional	Last name of the manager of the employee.
Manager LAN ID	Optional	Network ID of the manager of the employee.
Employee Email	Optional	A unique email address of the employee. Axon sends emails to this address.

Field	Type	Description
Employee First Name	Optional	First name of the employee. Specify the name as it is recorded in the LDAP directory server of your organization.
Employee Last Name	Optional	Last name of the employee. Specify the name as it is recorded in the LDAP directory server of your organization.
Employee LAN ID	Optional	Network ID of the employee. LAN ID might be required if you want to enable Single Sign-On authentication. If the LAN ID column is empty, you must not map the LAN ID column of the template to any field in the Axon Field column when you perform a bulk upload.
Rel. Type	Required	The type of relationship between the employee and manager. Specify one of the following relationship types: <ul style="list-style-type: none"> - Direct report - Dotted line

Glossary X Project

Download the Glossary X Project relationship template to bulk upload the relationships between a glossary and project.

The following table describes the fields of the Glossary X Project relationship template:

Field	Type	Description
Rel. Description	Optional	The description about the relationship between the glossary and project.
Glossary Name	Required	Name of the glossary.
Glossary Parent Name	Optional	Parent name of the glossary term. The glossary parent name must exist in Axon.
Project Name	Required	Name of the project. Enter a name that other Axon users can recognize easily.
Parent Project Name	Optional	Parent name of the project if the project belongs to a hierarchy.
Rel. Type	Required	The type of relationship between the glossary and project. Specify whether the glossary is used for the project or is KDE for the project.

System X Product

Download the System X Product relationship template to bulk upload the relationships between a system and product.

The following table describes the fields of the System X Product relationship template:

Field	Type	Description
Product Name	Required	Name of the product.
Product Parent Name	Optional	Parent name of the product if the product belongs to a hierarchy.
System Name	Required	Short name of a system or an acronym that other Axon users can recognize easily for a system.
Rel. Type	Required	The type of relationship between the system and product. Specify whether the relationship type supports order management, trade execution, settlement, exposure management, or position management.
Product x Legal Entity Rel Type	Optional	The type of relationship between the product and the legal entity. Select Risk Owning Entity or Booking Entity.
Legal Entity Short Name	Optional	Short name of the legal entity.
Legal Entity Parent Name	Optional	Parent name of the legal entity if the legal entity belongs to a hierarchy.

Process X Glossary

Download the Process X Glossary relationship template to bulk upload the relationships between a process and glossary.

The following table describes the fields of the Process X Glossary relationship template:

Field	Type	Description
Rel. Description	Optional	Description of relationship between the process and glossary.
Glossary Name	Required	Name of the glossary.
Glossary Parent Name	Optional	Parent of the glossary term. The glossary parent name must exist in Axon.
Process Name	Required	Name of the process. Enter a name that other Axon users can recognize easily.
Process Parent Name	Optional	Name of the parent process if the process belongs to a hierarchy.
Rel. Type	Required	The type of relationship between the process and glossary. Select one of the following types: <ul style="list-style-type: none"> - Is used in Process - Is KDE for Process

Interface X Glossary

Download the Interface X Glossary relationship template to bulk upload the relationships between an interface and a glossary.

The following table describes the fields of the Interface X Glossary relationship template:

Field	Type	Description
Rel. Type	Required	The type of relationship between the interface and the glossary. Specify that the relationship type is the expected glossary item coverage.
Interface Name	Required	Name of the system interface.
Interface Source System	Optional	System from which the information flows out.
Interface Target System	Optional	System to which the information flows in.
Glossary Name	Required	Name of the glossary.
Glossary Parent Name	Optional	Parent of the glossary term. The glossary parent name must exist in Axon.

Role Templates

Use Role templates to explain how you can assign different stakeholder roles for an object. Download templates for Roles from Axon to perform a bulk upload.

You can bulk upload the following types of roles:

- Glossary
- Data Set
- System
- Interface
- Process

Glossary Role

Download the Glossary Role template to bulk upload glossaries to Axon.

The following table describes the fields of the Glossary Role template:

Field	Type	Description
Glossary Name	Required	Name of the glossary.
Glossary Parent Name	Optional	Parent name of the glossary term. The glossary parent name must exist in Axon.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.

Field	Type	Description
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Required	The role of the user. You can select the following roles: <ul style="list-style-type: none"> - Glossary Definition Owner - Glossary Steward - Glossary Subject Matter Expert - Strategic Data Owner - Data Quality Steward

Data Set Role

Download the Data Set Role template to bulk upload data sets to Axon.

The following table describes the fields of the Data Set Role template:

Field	Type	Description
Data Set Name	Required	Name of the data set.
Data Set System Name	Optional	Name of the system that the data set belongs to.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Required	The role of the user. You can select the following roles. <ul style="list-style-type: none"> - Data Steward - Data Business Subject Matter Expert - Data Technical Subject Matter Expert - Data Owner

System Role

Download the System Role template to bulk upload systems to Axon.

The following table describes the fields of the System Role template:

Field	Type	Description
System Name	Required	Short name of a system or an acronym that other Axon users can recognize easily for a system.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Required	The role of the user. You can select the following roles: <ul style="list-style-type: none">- System Business Owner- System IT Owner- System Business Subject Matter Expert- System Technical Subject Matter Expert- System Data Subject Matter Expert

Interface Role

Download the Interface Role template to bulk upload interfaces to Axon.

The following table describes the fields of the Interface Role template:

Field	Type	Description
Interface Name	Required	Name of the system interface.
Interface Source System	Optional	System from which the information flows out.
Interface Target System	Optional	System to which the information flows in.
User Email	Optional	Email address of the user. Must be unique. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.

Field	Type	Description
User Lan ID	Optional	Network ID of the user.
Governance Role	Required	The role of the user. You can select the following roles. <ul style="list-style-type: none"> - Interface Business Owner - Interface IT Owner - Interface Business Subject Matter Expert - Interface Technical Subject Matter Expert

Process Role

Download the Process Role template to bulk upload processes to Axon.

The following table describes the fields of the Process Role template:

Field	Type	Description
Process Name	Required	Name of the process.
Parent Process Name	Optional	Parent name of the process.
User Email	Optional	A unique email address of the user. Axon sends emails to this email address.
User First Name	Optional	First name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Last Name	Optional	Last Name of the user. Specify the name as it is recorded in the LDAP directory server of your organization.
User Lan ID	Optional	Network ID of the user.
Governance Role	Required	The role of the user. You can select one the following roles: <ul style="list-style-type: none"> - Process Owner - Process Steward - Process Executor - Process SME

Configure Access Control

You can define access control for users that log in to Axon.

You must have the Super Admin profile to perform this task.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, under the **Customize & Configure** category, click **Configure Axon**.
3. In the **Group** dropdown, select **Environment**.
4. Click the **Edit** button, and then click the **Edit** icon.

5. In the **Provide Access Control List Configuration** window, define the Access Control List (ACL) method and role for Axon users.
6. Click **Save** to save your changes in the **Provide Access Control List Configuration** window.
7. Click **Save** in the main **Configure Axon** page to save your settings.
8. In the Linux environment, run the following command to clear the contents of the `cache` directory:


```
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
```
9. Run the following command to restart the Memcached service:


```
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached restart
```
10. Run the following command to restart the HTTPD service:


```
service httpd restart
```

Note: When you clear the cache and restart the Memcached and HTTPD services, the Axon web interface might be disrupted for some users that are logged into Axon. Informatica recommends that you update the cache after you save your changes in all the **Configure Axon** pages. Additionally, perform this action during a maintenance period when very few users are using Axon.

Configure Access to Informatica Data Quality

If you have installed the Axon Agent, you must specify the details of the Axon Agent installation in Axon. Axon uses the parameters you specify to connect to Informatica Data Quality.

You must have the Super Admin profile to perform this task.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, under the **Customize & Configure** category, click **Configure Axon**.
3. In the **Group** dropdown, select **Data Quality**.
4. Click **Edit**, and configure the following properties:

Property	Description
Data Quality Server Host	Host name of the system where you installed the Axon Agent
Data Quality Server Port	Port number on which the Axon Agent runs

5. Click **Save**.
6. In the Linux environment, run the following command to clear the contents of the `cache` directory:


```
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
```
7. Run the following command to restart the Memcached service:


```
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached restart
```
8. Run the following command to restart the HTTPD service:


```
service httpd restart
```

Note: When you clear the cache and restart the Memcached and HTTPD services, the Axon web interface might be disrupted for some users that are logged into Axon. Informatica recommends that you update the cache after you save your changes in all the **Configure Axon** pages. Additionally, perform this action during a maintenance period when very few users are using Axon.

Configure Access to Secure@Source

If you selected the advanced configuration option during Axon installation, you would have entered the configuration settings for Secure@Source. If you did not select advanced configuration during Axon installation or if you want to update the connection settings for Secure@Source after the installation, go to the Axon Admin Panel.

You must have the Super Admin profile to perform this task.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, under the **Customize & Configure** category, click **Configure Axon**.
3. In the **Group** dropdown, select **Secure@Source**.
4. Click **Edit**, and configure the following properties:

Property	Description
Secure@Source Server Host	URL of the Secure@Source service in the following format: <code>http(s)://<host_name></code> or <code>http(s)://<IP_address></code>
Secure@Source Server Port	Port number of the Secure@Source service
Secure@Source Server Login User Name	User name to log in to the Secure@Source server
Secure@Source Server Login Password	Password to log in to the Secure@Source server
Secure@Source Server Login Namespace	User security domain of Secure@Source

5. Click **Save**.
6. In the Linux environment, run the following command to clear the contents of the `cache` directory:

```
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
```

7. Run the following command to restart the Memcached service:

```
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached restart
```
8. Run the following command to restart the HTTPD service:

```
service httpd restart
```

Note: When you clear the cache and restart the Memcached and HTTPD services, the Axon web interface might be disrupted for some users that are logged into Axon. Informatica recommends that you update the cache after you save your changes in all the **Configure Axon** pages. Additionally, perform this action during a maintenance period when very few users are using Axon.

Specify Prefix for Object Reference Numbers

Each Axon object is stored in the database with a unique reference number. For each object type, you must specify the prefix for the reference number. This helps you quickly identify an object type when you search

for the objects in the database. For example, if you prefix policy reference numbers with "POL-", you can identify the POL-2335446 object as a policy.

You must have the Super Admin profile to perform this task.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, under the **Customize & Configure** category, click **Configure Axon**.
3. In the **Group** dropdown, select **Reference Number Settings**.
4. Click the **Edit** button, and then click the **Edit** icon.
5. In the **Facets Reference Number** window, enter the prefixes for the Axon object types.
6. Click **Save** to save your changes in the **Facets Reference Number** window.
7. Click **Save** in the main **Configure Axon** page to save your settings.
8. In the Linux environment, run the following command to clear the contents of the `cache` directory:

```
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
```
9. Run the following command to restart the Memcached service:

```
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached restart
```
10. Run the following command to restart the HTTPD service:

```
service httpd restart
```

Note: When you clear the cache and restart the Memcached and HTTPD services, the Axon web interface might be disrupted for some users that are logged into Axon. Informatica recommends that you update the cache after you save your changes in all the **Configure Axon** pages. Additionally, perform this action during a maintenance period when very few users are using Axon.

Configure Email Delivery Options

To receive email notifications, you must enter the details of the email server in Axon.

You must have the SuperAdmin profile to perform this task.

1. From the Axon toolbar, click the **Admin Panel** menu item under your user name.
2. In the menu on the left, under the **Customize & Configure** category, click **Configure Axon**.
3. In the **Group** dropdown, select **Email Options**.
4. Click **Edit**.
5. Configure the following properties:

Option	Description
Mailer Transport	Email protocol
Mailer Host	Your email host address
Mailer User Name	Your email user name
Mailer Password	Your email password
Mailer Port	Email server port

Option	Description
Disable Email Delivery	Select the check box to disable email delivery to Axon users

- Click **Save**.
- In the Linux environment, run the following command to clear the contents of the `cache` directory:

```
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
```

- Run the following command to restart the Memcached service:

```
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached restart
```

- Run the following command to restart the HTTPD service:

```
service httpd restart
```

Note: When you clear the cache and restart the Memcached and HTTPD services, the Axon web interface might be disrupted for some users that are logged into Axon. Informatica recommends that you update the cache after you save your changes in all the **Configure Axon** pages. Additionally, perform this action during a maintenance period when very few users are using Axon.

Specify Support Email Address

To contact the support team, Axon users can click the ? icon and then select **Contact Support**. You can change the default email address for Axon support when users choose to contact the support team.

You must have the Super Admin profile to perform this task.

- From the Axon toolbar, click the **Admin Panel** menu item under your user name.
- In the menu on the left, under the **Customize & Configure** category, click **Configure Axon**.
- In the **Group** dropdown, select **Email Options**.
- Click **Edit**.
- In the **Support Email** field, enter the default email address for Axon support.
- In the Linux environment, run the following command to clear the contents of the `cache` directory:

```
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
```

- Run the following command to restart the Memcached service:

```
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached restart
```

- Run the following command to restart the HTTPD service:

```
service httpd restart
```

Note: When you clear the cache and restart the Memcached and HTTPD services, the Axon web interface might be disrupted for some users that are logged into Axon. Informatica recommends that you update the cache after you save your changes in all the **Configure Axon** pages. Additionally, perform this action during a maintenance period when very few users are using Axon.

Update Cache with Configuration Values

Some Axon configurations in the Admin Panel are saved to the Axon database, but these configuration values are not loaded to the Axon cache. To make the configuration changes available to the Axon users, you must update the Axon cache with the new configuration values.

You must update the Axon cache when you perform the following configurations:

- Change the support email address
- Configure email delivery options
- Configure a SAML 2.0 application to work with Axon
- Configure Access Control
- Configure access to Enterprise Data Catalog
- Configure access to Data Quality
- Configure access to Secure@Source
- Specify prefix for the reference numbers of Axon objects

After you make the above configurations, perform the following steps in the Linux environment to clear the Axon cache and load the cache with the new configuration values:

1. Run the following command to clear the contents of the `cache` directory:

```
rm -rf <INSTALLATION_DIRECTORY>/axonhome/axon/app/cache/*
```

2. Run the following command to restart the Memcached service:

```
<INSTALLATION_DIR>/axonhome/third-party-app/scripts/memcached restart
```

3. Run the following command to restart the HTTPD service:

```
service httpd restart
```

Note: When you clear the cache and restart the Memcached and HTTPD services, the Axon web interface might be disrupted for some users that are logged into Axon. Informatica recommends that you update the cache after you save your changes in all the **Configure Axon** pages. Additionally, perform this action during a maintenance period when very few users are using Axon.

APPENDIX A

Glossary

admin

The user profile that can perform administrative tasks on facets. Users with the admin profile have access to the Admin Panel.

attribute

A property of the data set. The attributes of a data object exist only within the context of a data set.

attribute link

The link that shows how an attribute in a data set is connected to one or more attributes in other data sets and systems.

Axon

Axon is a knowledge repository and governance tool that stores the core data items and the business context of your organization.

capability

A facet that refers to a list of activities, deliverables, or skills that is available in your organization. Use the Capability facet to inventorize the core capabilities of your organization and link them to the data, information technology, and business assets.

change request

A change request facilitates communication and discussion between the object stakeholders and the wider Axon community.

client

A facet that captures the core client segments of an organization and describes the context by connecting the clients to the other facets.

committee

A facet that contains an inventory of the core governance bodies of an organization and how they are related to each other.

data quality

A facet that displays the data quality rules and reports.

data set

A facet that holds the data structures, such as client, product, and transaction, of a system.

DQ Report

A data quality report that holds the scores or ratings of the data quality rules for a given period.

DQ Rule

A data quality rule that checks the quality of the data in systems.

facet

A structure that describes different aspects of an organization.

glossary

A facet that captures the definitions for data, activities, business terms, and other objects of an organization.

grid

A grid shows the list of objects based on the search criteria. The grid consists of columns that you can configure.

Insight Map

A graphical representation of the relationships between objects across different facets.

legal entity

A facet that contains an inventory of the legal entities of an organization that is aligned across different entities and jurisdictions.

Local DQ Rule

The data quality rules that are defined within the context of a system.

Local Map

A graphical representation of the immediate relationships of the object that you have currently opened.

object

A term that indicates each item listed in a facet.

org unit

A facet that describes the complex hierarchical structure of an organization.

people

A facet that describes the Axon users, the user profiles, and the org units to which the users belong.

policy

A facet that contains a statement of a plan or principles that address the needs of a particular situation.

process

A facet that contains a series of actions performed in a logical order to achieve a particular task or objective.

product

A facet that captures the core product segments of an organization and describes the context by connecting the products to the other facets.

project

A facet that contains a collection of activities that are planned and organized in order to achieve a particular set of objectives.

Quick Search

Finds objects in Axon across all facets.

role

A facet that describes the role of stakeholders in different areas such as data, information technology, and business areas.

Standard DQ Rule

A data quality rule that is configured at the glossary level. A Standard DQ Rule sets the guidelines to measure the quality of an object, such as a data set and attributes, that is linked to a Standard DQ Rule.

superadmin

The user profile that can perform all administrative tasks in Axon. In comparison to an admin profile, a user with a SuperAdmin profile can perform additional tasks, such as configure default workflows and edit glossary rules engine.

system

A facet that holds one or more collections of data assets that are useful to your organization.

system interface

A facet that facilitates the flow of information between systems and data sets.

Unison Search

A powerful search function that is central to Axon. When you search using Unison, you can view objects that are linked to the object that you searched for in all the available facets.

user profile

A profile that the administrator associates to the user account to perform tasks on objects in Axon.

webuser

The most basic user profile in Axon that has permission to view content. An administrator can provide advanced permissions to a WebUser on a facet by assigning a role.

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