Informatica® Axon Data Governance
6.2

Quick Look User Guide

Informatica Axon Data Governance Quick Look User Guide
6.2
August 2019

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Publication Date: 2019-09-04

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Preface

Use the *Axon Quick Look User Guide* to learn how to use Informatica Axon Quick Look. You can use Axon Quick Look to search for Axon glossaries from your computer desktop. This guide also contains the instructions to install Axon Quick Look.

This guide is written for day-to-day business users who want to look up glossary terms that are defined and governed in Axon.

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https://www.informatica.com/services-and-training/customer-success-services/contact-us.html.

To find online support resources on the Informatica Network, visit https://network.informatica.com and select the eSupport option.

CHAPTER 1

Installing Axon Quick Look

This chapter includes the following topics:

- Installation Overview, 7
- Prerequisites, 7
- Installing Axon Quick Look in Graphical Mode, 8
- Installing Axon Quick Look in Silent Mode, 11
- Uninstalling Axon Quick Look, 12

Installation Overview

You can install Axon Quick Look in either graphical or silent mode. You can choose the installation mode depending on how you want the users in your enterprise to install Axon Quick Look on their computers.

When you install Axon Quick Look on Windows, Axon Quick Look gets installed as an application in the Windows desktop menu.

You can provide business users a location to download Axon Quick Look. You might want to inform users how to configure preferences, hotkeys, and server settings for the Axon Quick Look application.

Prerequisites

Verify the following prerequisites before you install Axon Quick Look:

- You have installed Informatica Axon Data Governance version 6.2. Axon Quick Look connects to the server on which Axon Data Governance runs and extracts glossary information. For more information on installing Axon Data Governance, see the *Informatica Axon Data Governance 6.2 Installation Guide*.
- You must be running Windows 7 or Windows 10 on your computer.
- You must be a native Axon user. You cannot log in to Axon Quick Look using your Single Sign-On (SSO) and LDAP credentials.

Installing Axon Quick Look in Graphical Mode

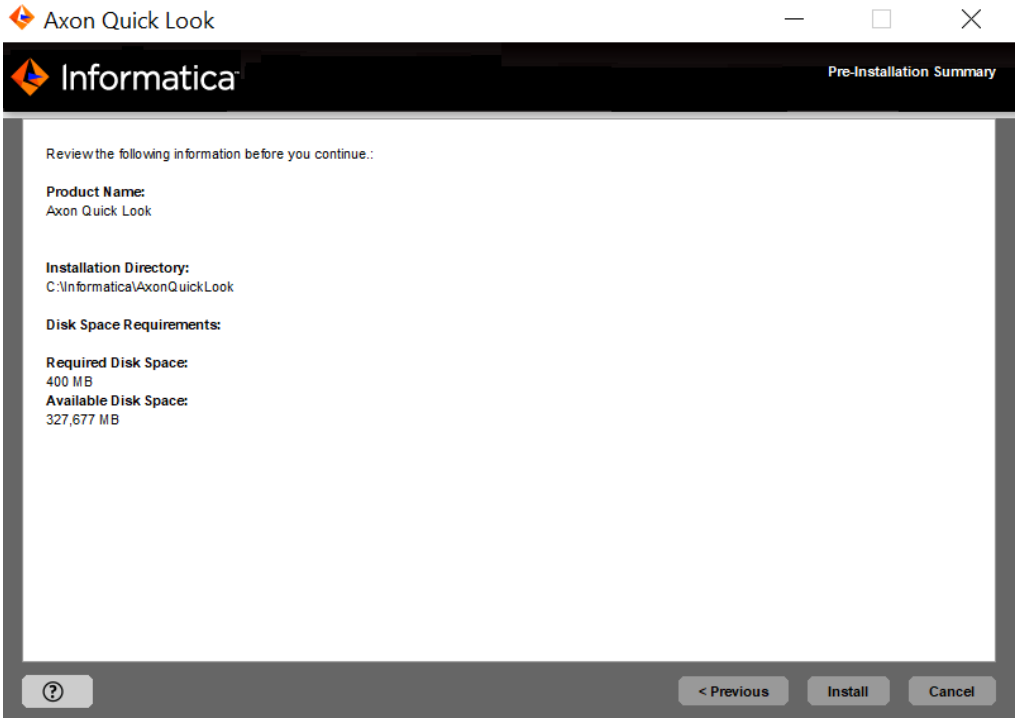
Download the installation file and install the Axon Quick Look application on your machine.

1. Extract the `AxonQuickLook_Win.zip` file.
2. Run the `Install.bat` windows batch file.

   The **Welcome** screen for the installation wizard appears.
3. Click **Next**.

   The **Installation Directory** screen appears.
4. Select the default folder or browse to another location to install Axon Quick Look, and click **Next**.

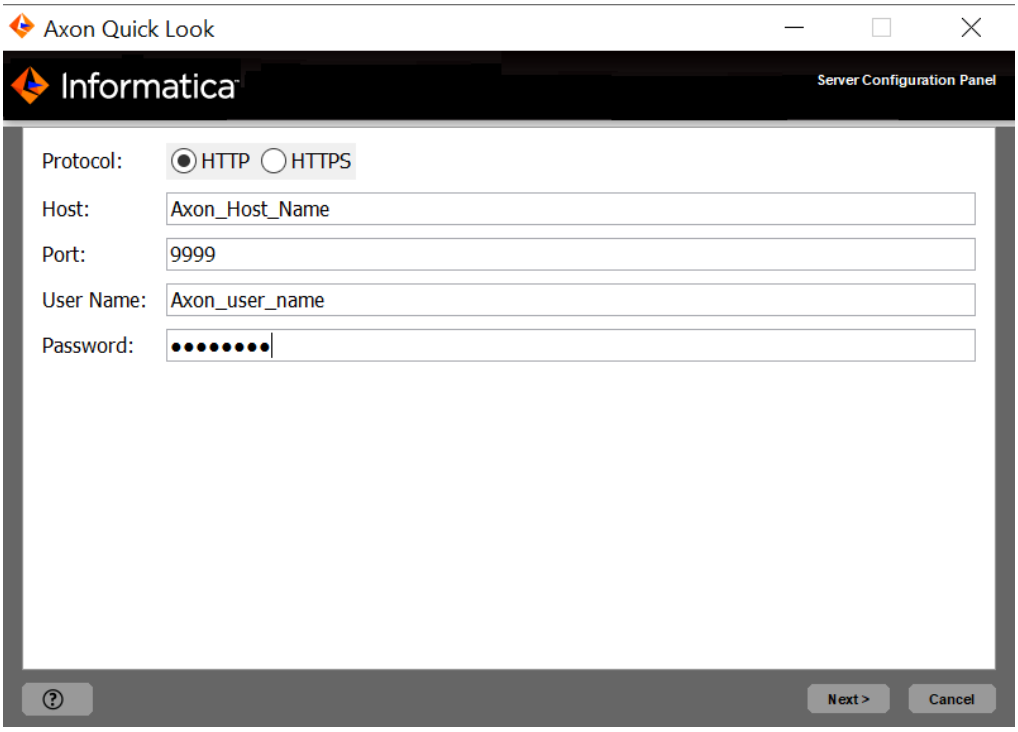
   The **Pre-Installation Summary** screen appears.
   The following image shows the pre-installation summary for Axon Quick Look:



5. Click **Install**.

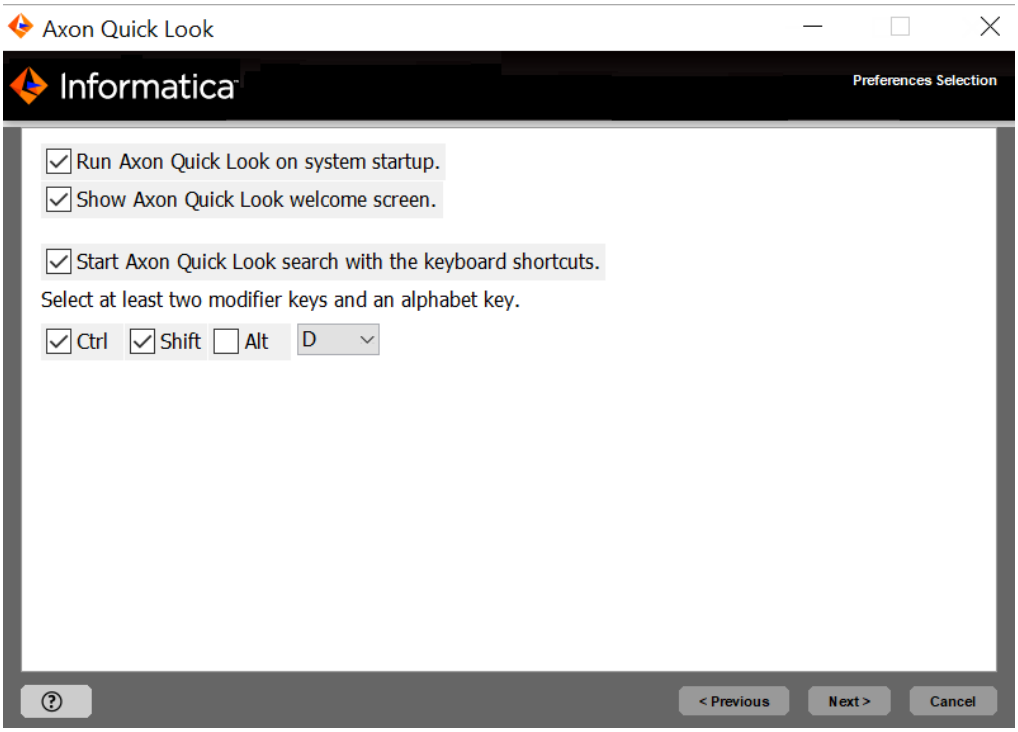
   The installer installs Axon Quick Look on your computer, and then the **Server Configuration Panel** screen appears.

The following image shows the server properties that you need to configure for Axon Quick Look:



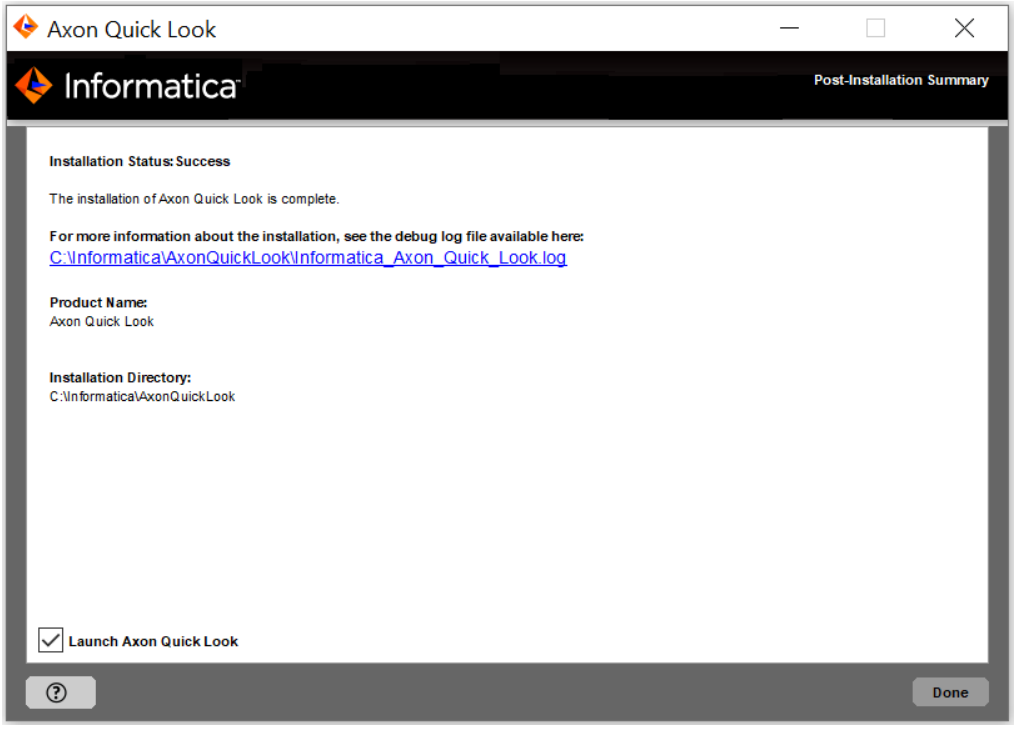
6. Configure the server settings, and click **Next**.

   The **Preferences Selection** screen appears.
   The following image shows the display and shortcut preferences that you can select:



7. Enter the display and shortcut preferences, and click **Next.**

The installation of Axon Quick Look is complete and the **Post-Installation Summary** screen appears. The following image shows the post-installation summary for Axon Quick Look:



8. Click **Done.**

   The Welcome screen appears.

Configuring Server Settings

Configure server settings to enable the Axon Quick Look application to reference the objects from Informatica Axon Data Governance. You can provide the host, port, and user credentials of your Axon Data Governance instance.

You need to enter the following server settings:

Protocol

The HTTP or HTTPS protocol.

Host

Host name of the machine on which Axon Data Governance runs.

Port

Port number of the machine on which Axon Data Governance runs.

- If you select the HTTP protocol, the default port number is 9999.
- If you select the HTTPS protocol, the default port number is 9443.
- If your Axon instance is hosted on the cloud, the default port number is 443.

Username

User name of the Axon Data Governance user.

Password

Password of the Axon Data Governance user.

Installing Axon Quick Look in Silent Mode

To install Axon Quick Look without user interaction, install in silent mode by using the properties file that contains the silent installation arguments. After installation, Informatica Axon Quick Look appears in the Windows menu.

1. Navigate to the directory that contains the Axon Quick Look installation files.
2. Use a text editor to open the `SilentInput.properties` file, and specify the installation parameters.
3. Save the `SilentInput.properties` file.
4. To install Axon Quick Look, run the `silentInstall.bat` file.

Silent Install Arguments

When you install Axon Quick Look in silent mode, you must pass arguments to specify the server settings for the Axon Quick Look application.

Configure the following properties for the silent installation:

USER_INSTALL_DIR

The directory in which you want to install Axon Quick Look.

PROTOCOL_TYPE

The HTTP or HTTPS protocol.

HOST_NAME

Host name of the machine on which Axon Data Governance runs.

PORT_NUMBER

Port number of the machine on which Axon Data Governance runs.

DOMAIN_USERNAME

User name of the Axon Data Governance user.

DOMAIN_PASSWD

Password of the Axon Data Governance user.

RUN_ON_STARTUP

Runs Axon Quick Look on system startup. Enter `True` to enable this parameter. Enter `False` to disable this parameter. The default value is `False`.

SHOW_WELCOME_SCREEN

Shows welcome screen after Axon Quick Look starts. Enter `True` to enable this parameter. Enter `False`" to disable this parameter. The default value is `False`.

ENABLE_HOTKEYS

Enables keyboard shortcuts to launch Axon Quick Look. Enter `True` to enable this parameter. Enter `False` to disable this parameter. The default value is `False`.

SELECTION_CONTROL

Selects **CTRL** as a modifier key. Enter `True` to enable this parameter. Enter `False` to disable this parameter. The default value is `False`.

SELECTION_SHIFT

Selects **SHIFT** as a modifier key. Enter `True` to enable this parameter. Enter `False` to disable this parameter. The default value is `False`.

SELCTION_ALT

Selects **ALT** as a modifier key. Enter `True` to enable this parameter. Enter `False` to disable this parameter. The default value is `False`.

ALPHABET_HOTKEY

Enter an alphabet key in uppercase for the hotkey combination. The default value is `D`.

LAUNCH_APPLICATION

Set this parameter to `1` if you want to launch Axon Quick Look after the installation is complete. If you do not want Axon Quick Look to automatically launch after installation, set this parameter to `0`. The default value is `1`.

Uninstalling Axon Quick Look

Run the uninstaller file to remove all the Axon Quick Look files in the Axon Quick Look home and installation directories. You must exit from the Axon Quick Look application before you start with the uninstallation.

1. Navigate to the `Uninstall` folder under the Axon Quick Look installation directory.
2. Run the `uninstaller.exe` file.

   If you installed Axon Quick Look in silent mode, the uninstallation runs in silent mode. If you installed Axon Quick Look in graphical mode, the **Informatica Axon Quick Look Setup** wizard appears for uninstallation.
3. To continue, click **Uninstall**.

   The **Uninstallation Summary** screen appears after Axon Quick Look is uninstalled.
4. Click **Done**.

CHAPTER 2

Getting Started

This chapter includes the following topics:

- Axon Quick Look Overview, 13
- Launch Axon Quick Look, 13
- Axon Quick Look Interface, 15
- Search and View Glossaries, 16

Axon Quick Look Overview

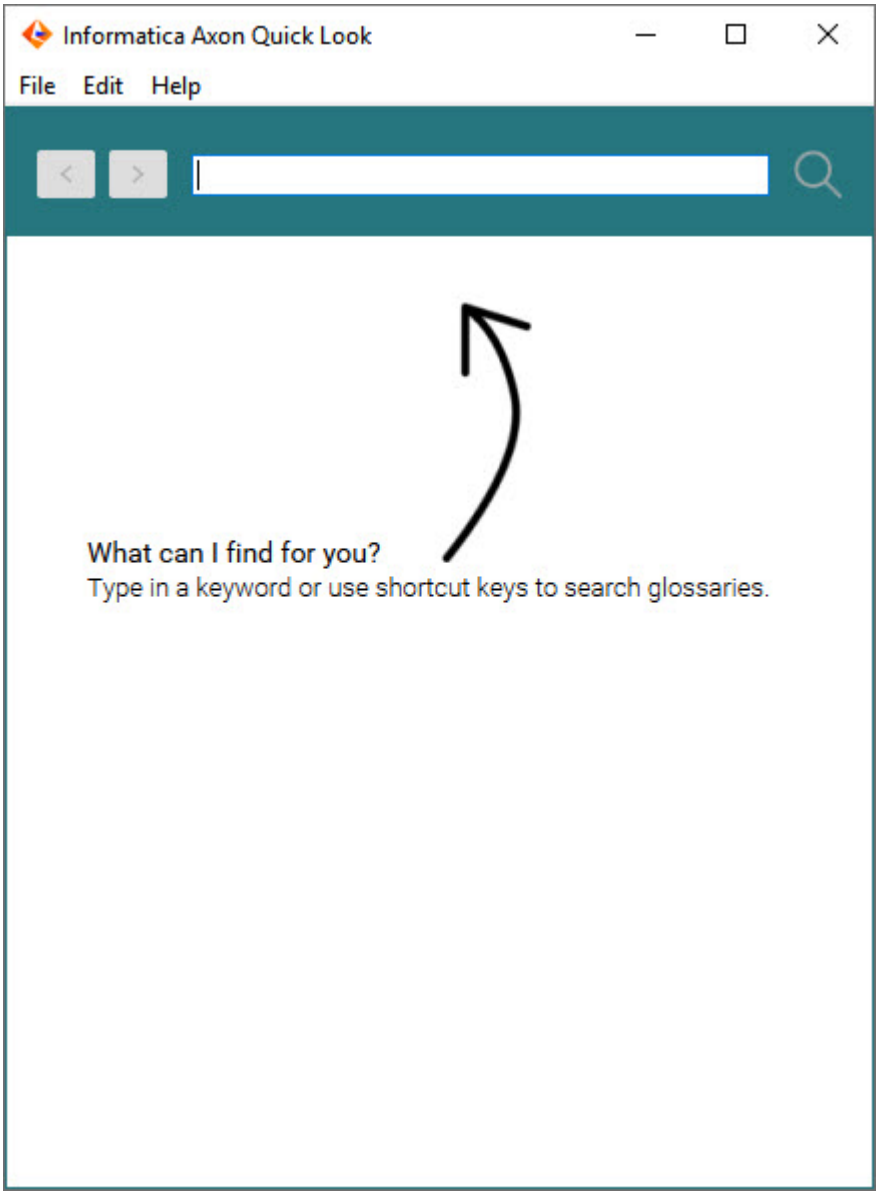
Informatica Axon Quick Look is a program that you can quickly access from the desktop. Use the Axon Quick Look application to search for glossaries in Axon Data Governance without opening the Web page. Use Axon Quick Look to search and look up glossary terms that are defined in Axon Data Governance. You can also select keywords from applications, such as Microsoft Word, Microsoft Excel, and Google Chrome, and use the hotkeys to perform a lookup in the Axon Quick Look application.

Launch Axon Quick Look

You can launch Axon Quick Look from your Windows Start menu.

To start Axon Quick Look from your Windows Start menu, click **Start** > **Informatica Axon Quick Look > Informatica Axon Quick Look**.

The following image shows Axon Quick Look when you launch the application:



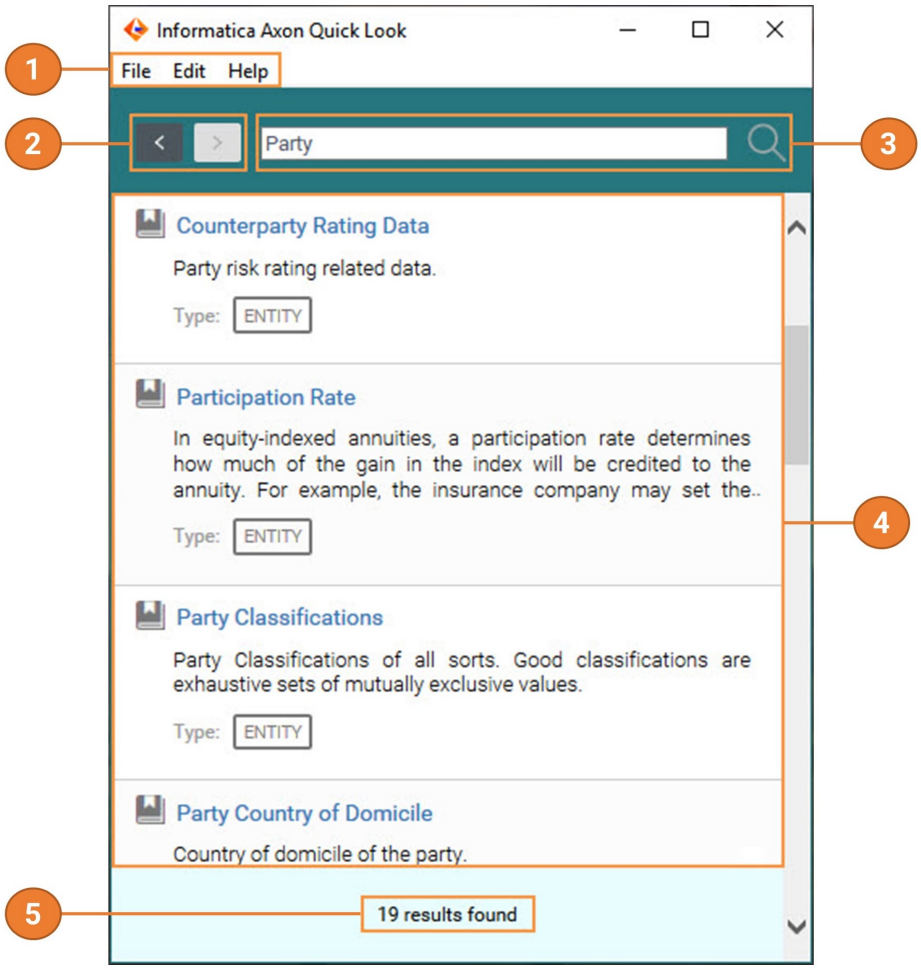
After you launch Axon Quick Look, the Informatica Axon Quick Look icon appears in the Windows system tray. You can right-click the icon to change the configuration settings or exit Axon Quick Look.

To begin using Axon Quick Look, enter a term in the search window and click the search icon.

Axon Quick Look Interface

Use the Axon Quick Look desktop program to search glossary terms that are stored in Axon Data Governance. The Axon Quick Look search results are sorted by the glossary names.

The following image shows the Informatica Axon Quick Look interface when it displays a search result:



1. Toolbar menus
2. Navigation options
3. Keyword search
4. Search results
5. Number of search results

The following table describes the actions you can perform in Axon Quick Look:

Function	Action
To print or preview business term details	Click **File** > **Print** or **File** > **Print Preview**.
To copy, select, find text, and change settings, such as keyboard shortcuts and preferences	Click **Edit**.
To view online help for Axon Quick Look	Click **Help**.
To look up a glossary term	Enter a keyword in the search text and click **Search**.
To view glossary term details such as glossary properties, stakeholders, and related terms.	Click a glossary term from the search results.
To navigate back and forth between business terms.	Click the front and back arrow icons to the left of the search box.
To exit Axon Quick Look	Click **File** > **Exit**.

Click the × symbol in the top-right corner to minimize Axon Quick Look to the system tray. To quit the application, right-click on Axon Quick Look in the system tray and select **Exit**.

Search and View Glossaries

An Axon glossary is a set of terms that uses business language to define concepts for business users. A glossary term provides the business definition and usage of a concept.

Look up a glossary term in Axon Quick Look to get the context and meaning for the term. Click the glossary term to view more information.

Perform the following steps to search a glossary:

1. Enter a glossary name or alias in Axon Quick Look. Axon Quick Look displays a list of glossary terms that match the term.
2. Alternatively, highlight a glossary term in another application, such as MS Word, and use a keyboard shortcut to launch Axon Quick Look with the search results.
3. Click a glossary term to view the glossary information.

You cannot edit glossaries in Axon Quick Look. To edit or update a glossary, click the icon for a glossary term to open the object in the Web version of Axon Data Governance.

View Glossary Properties

In Axon Quick Look, view the glossary information, such as alias names, parent, examples, and stakeholders. You can also view related systems, policies, and processes.

The following table describes the properties that you can view within a glossary object:

Field	Description
Name	Name of the glossary.
Definition	Description of the glossary.
Alias Name	Alternate names for the glossary. Usually, it is the synonyms of the glossary that are commonly used in your organization.
Examples	Contextual examples based on the business logic of the glossary.
Parent	Parent of the glossary in the hierarchy.
Type	The type of a glossary. Specifies whether the glossary refers to an entity, domain, or business term.
Lifecycle	Stage of the glossary in the approval lifecycle. You can view the following stages: - Draft - Being validated - Approved - Obsolete
Axon Status	Status of the glossary in Axon Data Governance.
KDE	Indicates whether or not the glossary is a key data element.
Security Classification	Security classification of the glossary. You can view the following security classification options: - Public - Internal - Confidential - Secret
Last Update	The latest date on which the glossary object was updated.
Stakeholders	The stakeholders that are assigned to the glossary object.
Related Systems	The systems that are related to the glossary object.
Related Processes	The processes that are related to the glossary object.
Related Policies	The policies that are related to the glossary object.

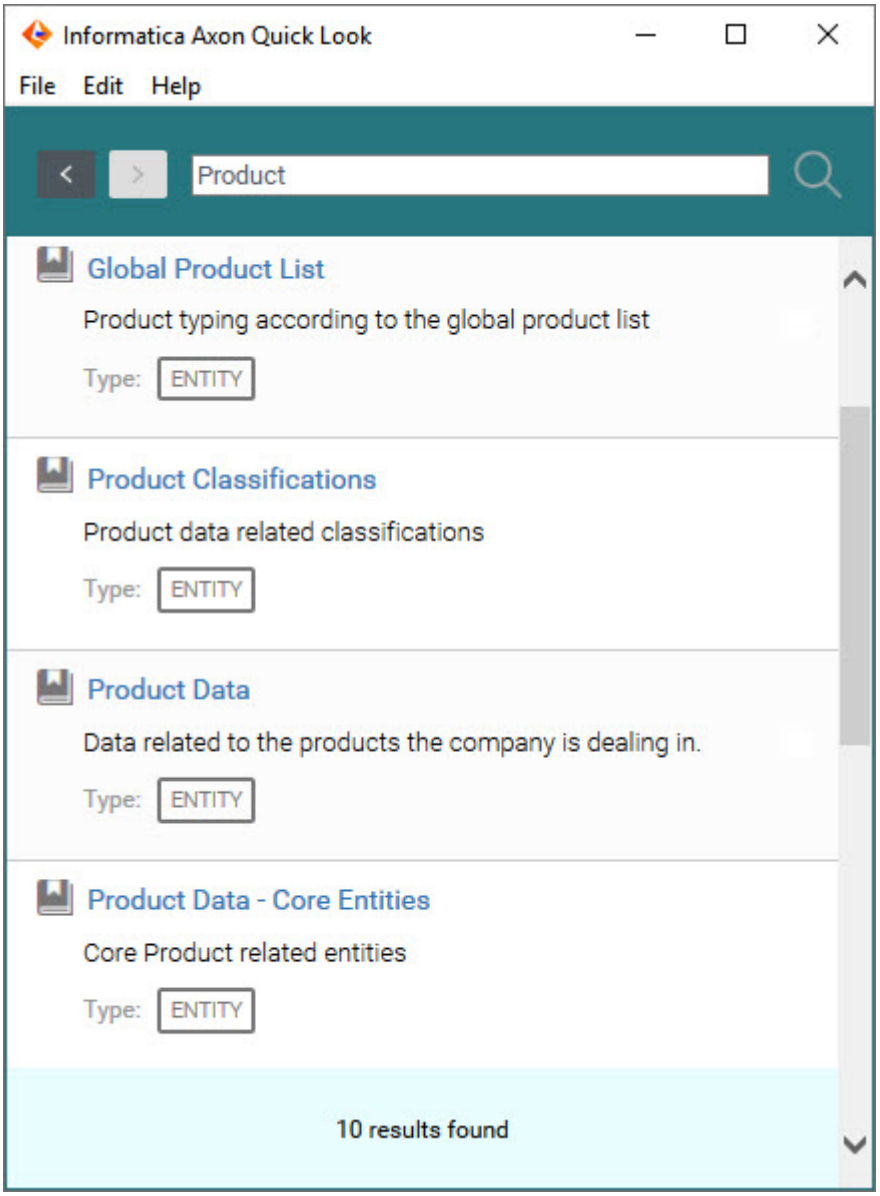
If a property does not have a value in Axon, Axon Quick Look does not display that property.

Example

You can quickly search and view glossary terms in Axon Quick Look. You can view glossary information, such as alias names, parent, type, and related objects. For example, look up for a glossary with the name "Product Classifications" and view its parent and related objects.

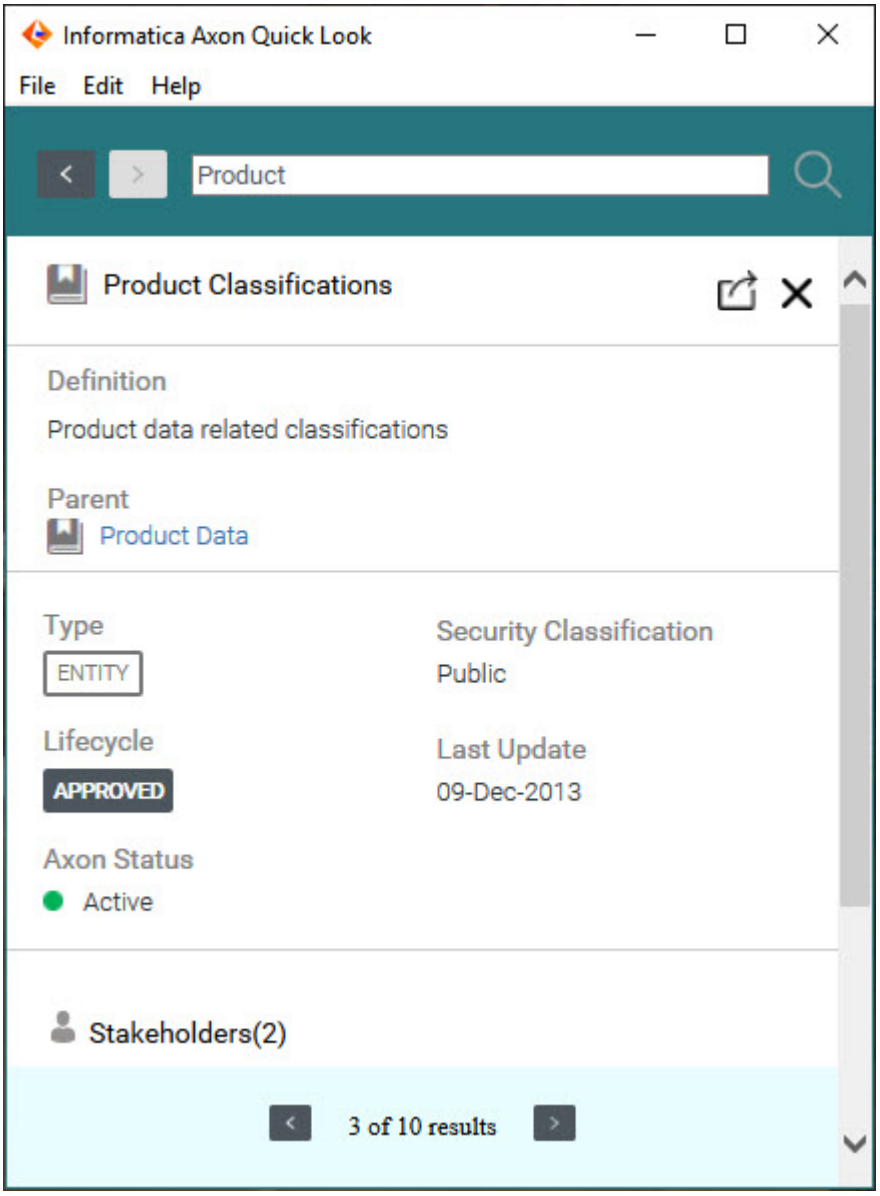
1. In the Informatica Axon Quick Look client, enter the keyword "Product" in the search text. Click **Search**.
2. Alternatively, if you have configured hotkeys during installation, perform the search using keyboard shortcuts. Highlight the word "Product" from any application, such as Microsoft Word, and press the configured hotkeys, for example **CTRL+SHIFT+ALT+D**, to open Axon Quick Look with the search results.

   The following image shows the sample search results for the "Product" keyword:



   You can press **CTRL+F** to search for specific entries within the search results.
3. Click the **Product Classifications** glossary.

The following image shows the Product Classifications glossary information:

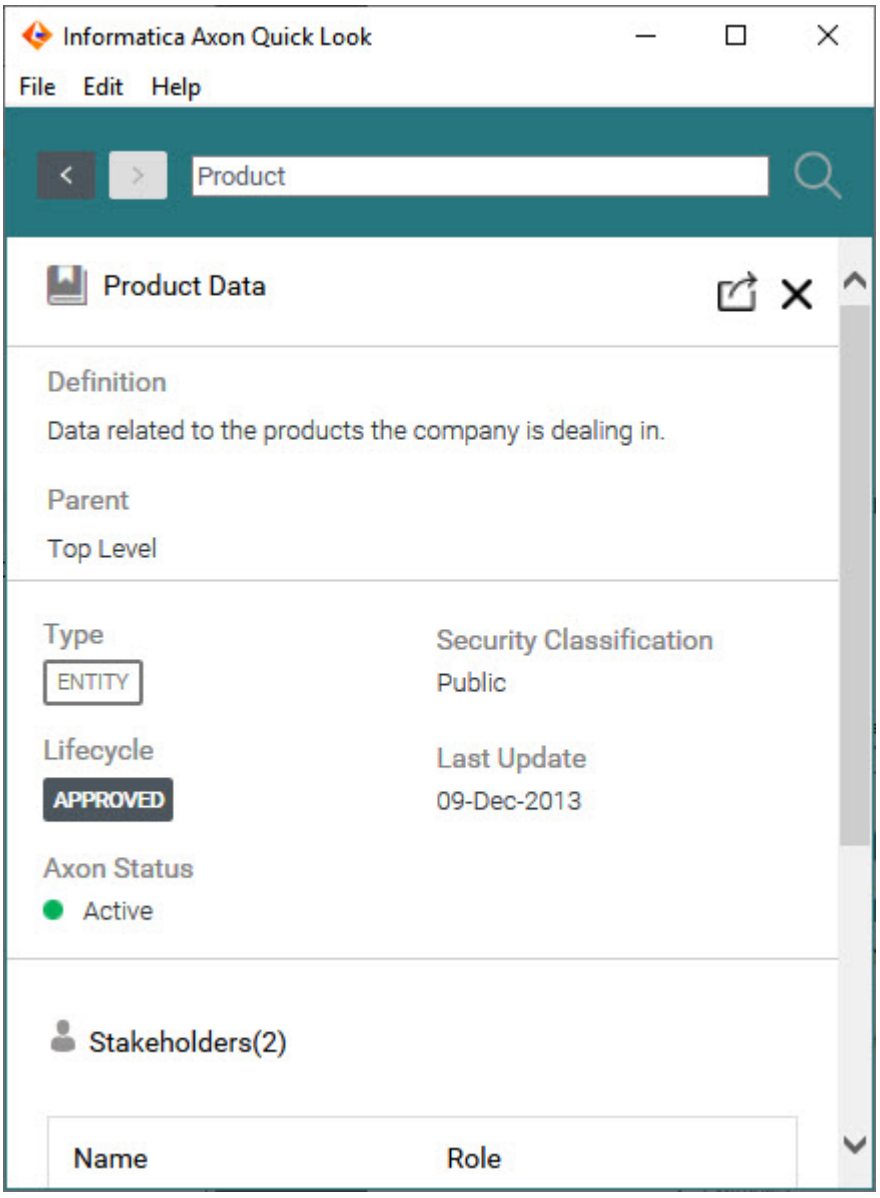


4. View the glossary information, such as parent, alias names, and related objects. Axon Quick Look displays up to three related objects, and they are sorted by name.

   To open a glossary in Axon Data Governance, click the icon. If you click a related object, the object opens in Axon Data Governance.

5. To view the parent glossary information, click **Product Data**.

The following image shows the Product Data glossary information:



6. To go back and forth between glossaries, click the front and back arrows.

CHAPTER 3

Customizing Axon Quick Look

This chapter includes the following topics:

- Customizing Axon Quick Look Overview, 21
- Configuring Hotkeys, 21
- Configuring Preferences, 23
- Modifying Server Settings, 24

Customizing Axon Quick Look Overview

Axon Quick Look appears as a client on the Windows system menu. After you start the Axon Quick Look client, you can configure the keyboard shortcuts and preferences, and modify the server settings.

Configuring Hotkeys

You can configure hotkeys to launch the Axon Quick Look client from any application, such as Microsoft Word and Google Chrome. The combination of the hotkeys must be unique. For example, if you select a word

"SSN" and press Ctrl+Shift+D, Axon Quick Look opens with the "SSN" glossary search results. When you use hotkeys to perform a search, the Axon Quick Look application must be running in the background.

1. In the Axon Quick Look application, click **Edit** > **Settings**.

   The following image shows the **Hotkeys** tab in the **Informatica Axon Quick Look Settings** dialog box:

2. Click **Hotkeys**.
3. Select the option to start the glossary search with the keyboard shortcuts.
4. Select at least two modifier keys and an alphanumeric key.

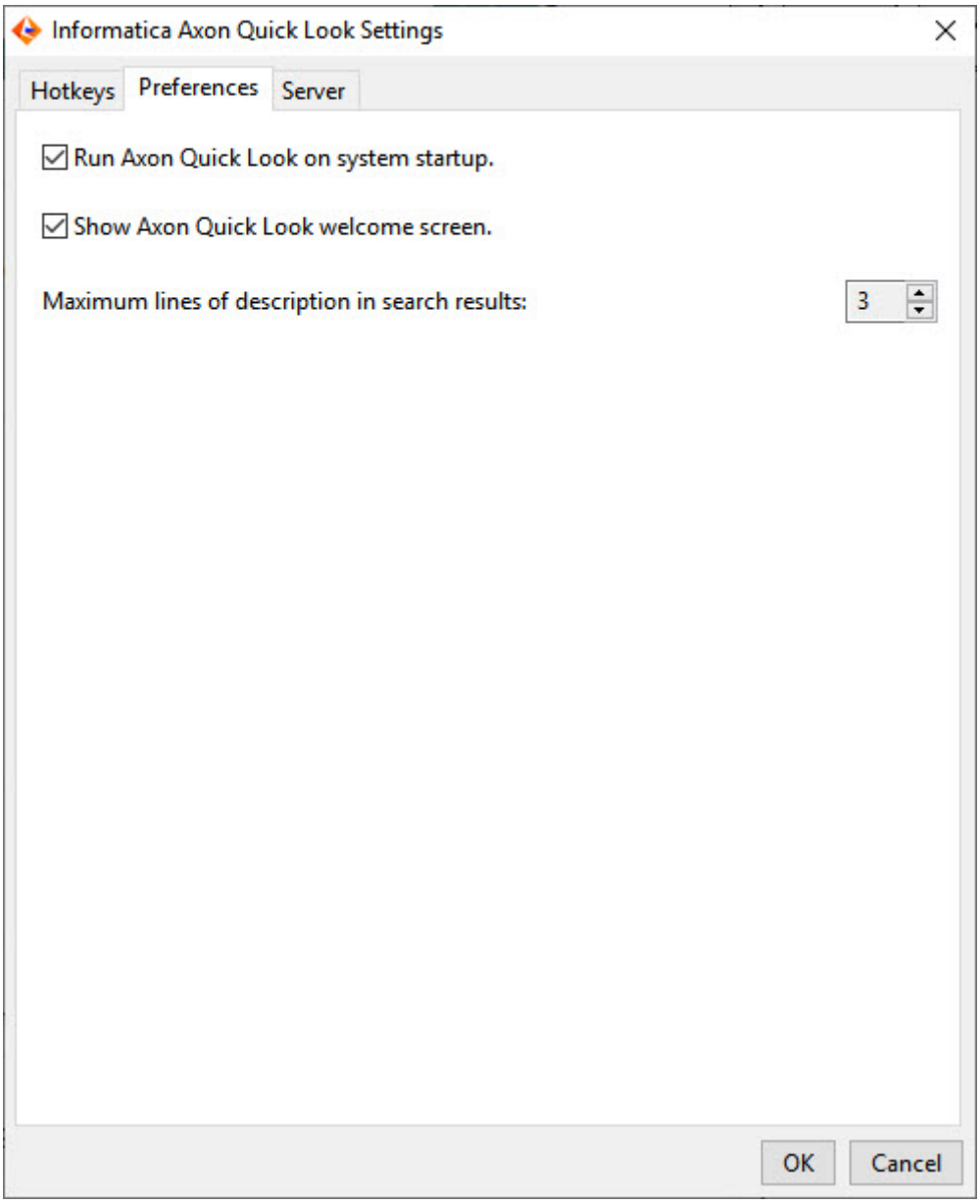
   The combination of the hotkeys must be unique.
5. Click **OK**.

Configuring Preferences

You can configure preferences to choose the general settings for Axon Quick Look.

1. Click **Edit** > **Settings**.

   The following image shows the **Preferences** tab in the **Informatica Axon Quick Look Settings** dialog box:



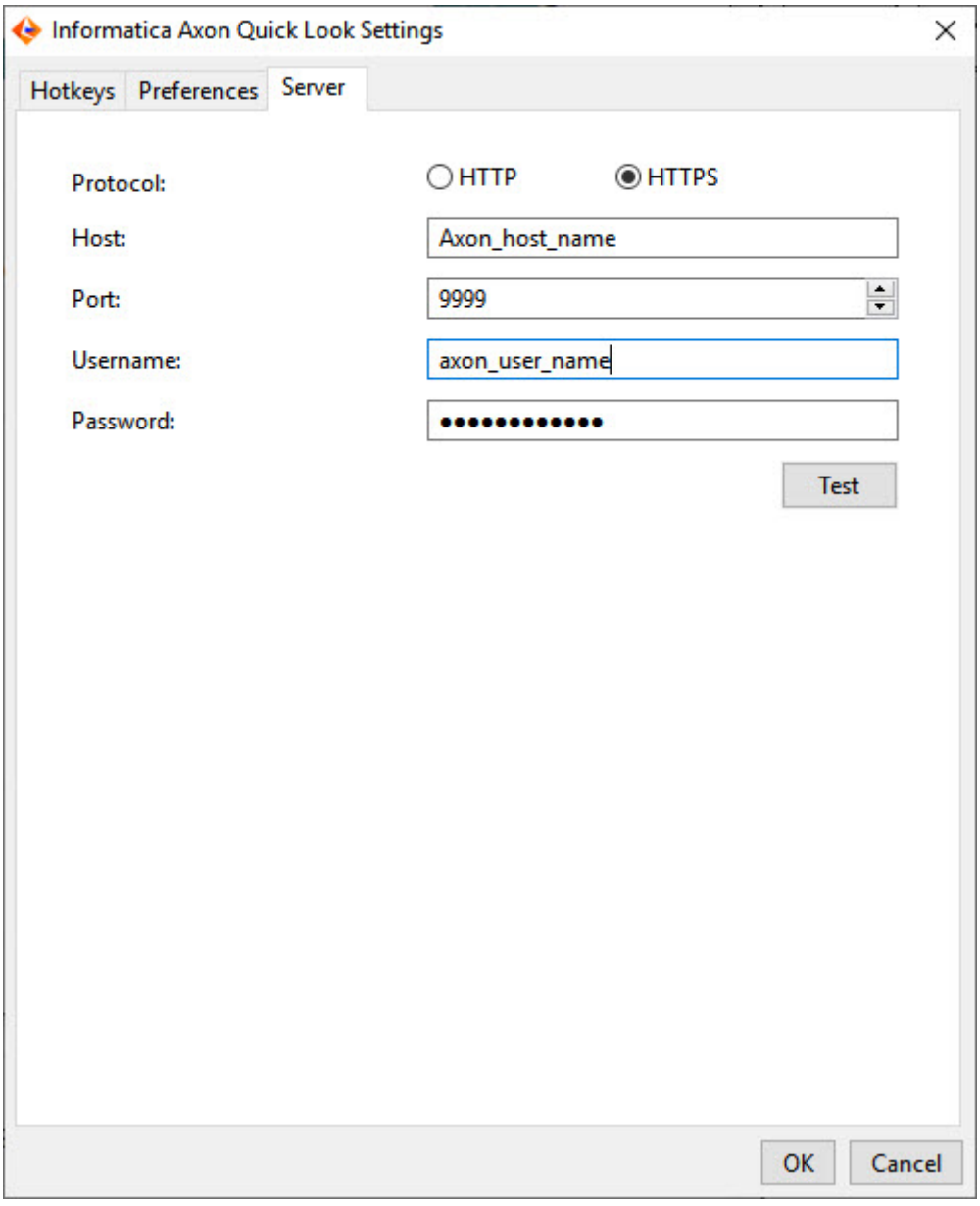
2. Click **Preferences**.
3. Select the required preferences for the Axon Quick Look client.
4. Enter the maximum number of lines of description that you want to view in search results. The default value is "3."
5. Click **OK**.

Modifying Server Settings

You can modify the server settings that you configured while installing Axon Quick Look. Configure the server settings to establish a connection to the machine on which Axon Data Governance runs.

1. Click **Edit** > **Settings**.

   The following image shows the **Server** tab in the **Informatica Axon Quick Look Settings** dialog box:



2. Click **Server**.
3. Edit the following server settings:
   - Protocol. Select **HTTP** or **HTTPS**.
   - Host. Enter the host name of the machine on which Axon Data Governance runs.

- Port. Enter the port number.
- Username. Enter the Axon Data Governance user name.
- Password. Enter the password.

4. To test the connection, click **Test**.

   If all the server settings are valid, Axon Quick Look displays a message about the connection being successful.

5. Click **OK**.

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