

Lineage Pro User Guide

Table of Contents

Groups	3
Filtering	3
Systems.....	4
Streams.....	5
New System	6
Datasets.....	7
New Dataset	8
Dataset Columns	9
Processes	11
New Process	11
Process Datasets.....	12
Column Lineages	13

Groups

The Groups screen allows for the entry and editing of groups. A group is a logical collection of systems and can represent whatever the creator deems appropriate.

Actions

1. Click on **A** if you want to select a Group Level filter.
2. Click on **B** if you wish to create a new Group.
3. Click on **C** if you wish to perform an edit or a delete on an existing Group entry.

Lineage Pro (Staging)

Groups Systems Datasets Dataset Columns Processes Process Datasets Column Lineage Admin

All **Filter** **A**

B **+ New**

C

Code	Name	Date	
AK01	Ashmeet	9/23/2024 2:13:27 PM	...
AK02	Ashmeet_testing September 23rd	9/24/2024 2:47:31 PM	...
GRP1	Group 1	9/14/2024 9:28:53 PM	...
SK01	Sanchit	9/16/2024 3:57:24 PM	...
Group 1	Scotia Wealth Management Domain	9/25/2024 6:30:19 PM	...

Showing 5 rows

Filtering

The filtering operation will do two things.

1. Filter the view of the current screen to only include entries that match the filter.
2. Create a unique lineage path through the various data entry screens.

Groups Systems Datasets Dataset Columns Processes Process Datasets Column Lineage Admin

All **Filter**

Groups

Code	Name
AK01	Ashmeet
AK02	Ashmeet_testing September 23rd

Filter

Group

Group 1 - Scotia Wealth Management Domain

Cancel Apply

In this example, we are filtering on the Group: Group 1 – Scotia Wealth Management Domain

Rule: You must filter as you progress from top level data down to detailed data.

Systems

A system is any physical location that is actively involved in the processing of data. Usually it is associated with a server or set of servers. A system may be an end node, whereby it either sends data or it receives data, or a system may be an internal node, and thus both sends and receives data.

With a system, the concept of a stream has been introduced.

Actions

- 1. Click on **A** to create a new Stream.

Lineage Pro (Staging)

Groups

Systems

Datasets

Dataset Columns

Processes

Process Datasets

Column Lineage

Admin

Group 1

Filter

Systems

A

+ New Stream

+ New System

Code	Name	Version	Stream	URI	Date	
B9M5	Wealth Information Services & Products (WISP)	1	1	Group 1	9/29/2024 10:08:33 PM	...
B9M5	Wealth Information Services & Products (WISP)	1	2	Group 1	9/29/2024 10:08:33 PM	...

Showing 2 rows

Streams

A stream is a mechanism for representing a system operating under different data processing functions. The nature of the processing function is usually associated with the business purpose for processing a set of files/tables.

The following represents the interface for creating a new stream for the System.

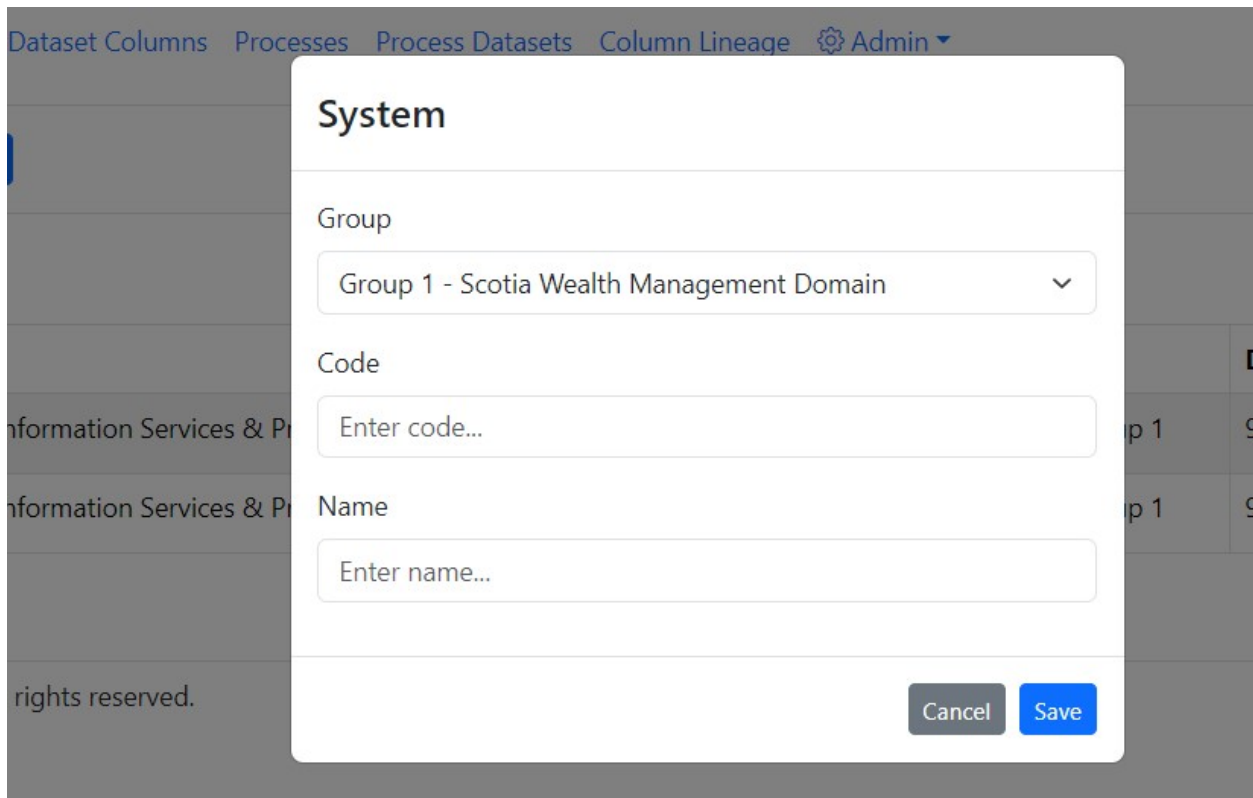
The screenshot displays the 'Stream' creation interface within the Conformity360 system. The interface is divided into a sidebar and a main panel. The sidebar contains navigation tabs: Groups, **Systems**, Datasets, Dataset Columns, Processes, Process Datasets, Column Lineage, and Admin. Below the tabs, there is a 'Group 1' section with a 'Filter' button. The main panel shows a 'Systems' table with columns 'Code' and 'Name'. Two rows are visible, both with 'B9M5' in the 'Code' column and 'Wealth Information Services & Products (V' in the 'Name' column. A 'Stream' modal form is open in the center, containing the following fields:

- Group: A dropdown menu showing 'Group 1 - Scotia Wealth Management Domain'.
- System: A dropdown menu showing 'Select...'.
- Version: A dropdown menu showing 'Select...'.
- Name: A text input field with the placeholder 'Enter name...'.
- Report Endpoint: A text input field with the placeholder 'Enter name...'.
- Target Emp Code: A text input field with the placeholder 'Enter Code...'.
- Description: A text input field with the placeholder 'Enter a description...'.

At the bottom right of the modal form are 'Cancel' and 'Save' buttons. The footer of the sidebar contains the copyright notice: '© 2024 conformity360.com. All rights reserved.'

New System

A system is defined by its name, a special unique code, and the Group in which it resides.



The screenshot shows a web application interface with a top navigation bar containing links: Dataset Columns, Processes, Process Datasets, Column Lineage, and Admin (with a gear icon and a dropdown arrow). A modal dialog box titled "System" is open in the center. It contains three input fields: a dropdown menu for "Group" with the selected value "Group 1 - Scotia Wealth Management Domain", a text input for "Code" with the placeholder "Enter code...", and a text input for "Name" with the placeholder "Enter name...". At the bottom right of the dialog are two buttons: "Cancel" and "Save". The background of the application is dimmed, showing parts of a table with columns like "Information Services & P" and "p 1".

Dataset Columns Processes Process Datasets Column Lineage Admin ▾

System

Group

Group 1 - Scotia Wealth Management Domain ▾

Code

Enter code...

Name

Enter name...

Cancel Save

Datasets

A dataset represents the concept of a collection of data in some form of structure/storage format. The typical datasets we are familiar with are Tables and Files. A dataset is uniquely associated with a specific System, however it can belong to different Groups and Streams.

Actions

1. Click on **A** to create a new Dataset

Lineage Pro (Staging)

Groups Systems **Datasets** Dataset Columns Processes Process Datasets Column Lineage Admin

Group 1 / B9M5 [Filter](#)

Datasets

A



Name	Asset Type	Domain	Status	URI	Date	
POACCT.txt	Candidate	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 3:08:14 PM	...
SBS_PA_Daily_1.zip	File/Extract	Payments – Enterprise File Highway (BCH3) Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 3:14:02 PM	...
POACLT.txt	File/Extract	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 3:29:15 PM	...
tadts_dcmnt_stts	Table	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 3:38:40 PM	...
WISP_TRANS.ACCOUNT	Table	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 3:53:07 PM	...
account_list_sm.txt	File/Extract	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 3:58:24 PM	...
WISP_TRANS.CLIENTACCOUNT	Table	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 4:04:11 PM	...
smiacctgeocode_YYYYMMDD.dat	File/Extract	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 4:08:59 PM	...
GeoCountryMapping.csv	File/Extract	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 4:12:47 PM	...
POACLTCT.txt	File/Extract	Wealth Information Services & Products (WISP) - B9M5 Data Assets	Candidate	Group 1/B9M5/v1	9/26/2024 7:42:29 PM	...

New Dataset

The following screenshots represent the interface for adding a new Dataset entry.

Dataset

Group
Group 1 - Scotia Wealth Management Domain

System
B9M5 - Wealth Information Services & Products (WISP)

Version
Select...

Name
Enter name...

Community
Enter community...

Domain
Enter domain...

Domain Type
Enter domain type...

Asset Type
Select...

Consumption Format
Select...

Character Encoding
Enter encoding...

Description
Enter a description...

Country

Origin
Enter origin...

Filtered Criteria
Enter criteria...

Historical Data

Availability
Enter availability...

Comments and Consideration
Enter comments...

Store Type

Name
Enter name...

Domain
Enter domain...

Asset Type
Select...

Domain Type
Enter domain type...

Community
Enter community...

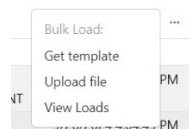
Dataset Columns

A Dataset Column is an element of data that carries a set of characteristics. A set of Dataset Columns makes up a Dataset.

Action

1. Clicking on ellipse (...)

The ellipse will present a menu that will allow for bulk uploading of Dataset Column data.



Lineage Pro (Staging)

Groups Systems Datasets **Dataset Columns** Processes Process Datasets Column Lineage Admin

Group 1 / B9M5 / v1 / WISP_TRANS.CLIENTACCOUNT

Filter

Dataset Columns



Name	Readable Name	Description	URI	Date	
WISPUUPDATEDATE	WISPUUPDATEDATE	WISPUUPDATEDATE	Group 1/B9M5/v1/WISP_TRANS.CLIENTACCOUNT	9/26/2024 4:04:45 PM	...
ACCOUNTACCESSLEVEL	ACCOUNTACCESSLEVEL	ACCOUNTACCESSLEVEL	Group 1/B9M5/v1/WISP_TRANS.CLIENTACCOUNT	9/26/2024 4:04:45 PM	...
ACCOUNTDISPLAY	ACCOUNTDISPLAY	ACCOUNTDISPLAY	Group 1/B9M5/v1/WISP_TRANS.CLIENTACCOUNT	9/26/2024 4:04:45 PM	...
ACCOUNTNUMBER	ACCOUNTNUMBER	ACCOUNTNUMBER	Group 1/B9M5/v1/WISP_TRANS.CLIENTACCOUNT	9/26/2024 4:04:46 PM	...
ADDRESSTYPE	ADDRESSTYPE	ADDRESSTYPE	Group 1/B9M5/v1/WISP_TRANS.CLIENTACCOUNT	9/26/2024 4:04:46 PM	...
BANKACCOUNTLETTERCREATED	BANKACCOUNTLETTERCREATED	BANKACCOUNTLETTERC...	Group 1/B9M5/v1/WISP_TRANS.CLIENTACCOUNT	9/26/2024 4:04:46 PM	...
BANKACCTREFNOCDN	BANKACCTREFNOCDN	BANKACCTREFNOCDN	Group 1/B9M5/v1/WISP_TRANS.CLIENTACCOUNT	9/26/2024 4:04:46 PM	...
BANKACCTREFNOUSD	BANKACCTREFNOUSD	BANKACCTREFNOUSD	Group	9/26/2024 4:04:47 PM	...

By clicking on New, a Dataset Column entry can be added. The following screenshots represent the data entry interface.

Dataset Column

Dataset

Group: Group 1 - Scotia Wealth Management Domain

System: BSM5 - Wealth Information Services & Products (WISP)

Version: 1

Dataset: WISP_TRANS.CLIENTACCOUNT

Column

Name: Enter name...

Readable Name: Enter readable name...

☐ Primary Key ☐ Foreign Key ☐ Unique ☐ Nullable

Default Value: Enter default value...

Format Masking: Enter formatting masking...

Valid Values

☐ Primary Key ☐ Foreign Key ☐ Unique ☐ Nullable

Default Value: Enter default value...

Format Masking: Enter formatting masking...

Valid Values: Enter valid values...

Description: Enter description...

Data Type

Type: Enter data type...

Length: Enter length...

Precision: Enter precision...

Sensitive Data Element

Full Name: Enter full name...

Asset Type: Enter asset type...

Community: Enter community...

Domain: Enter domain...

Cancel Save

Processes

Processes are the vehicles by which datasets are mapped to datasets, and columns are mapped to columns. A process is necessary to describe a source-to-target mapping.

Lineage Pro (Staging)

Groups Systems Datasets Dataset Columns **Processes** Process Datasets Column Lineage Admin

Group 1 / B9M5 / v1

Filter

Processes

+ New

Code	Name	Status	URI	Date	
SC01 - A	WISP - PA Tier 1 & Tier 2 Reports Generation	Candidate	Group 1/B9M5/v1/1	9/26/2024 5:03:26 PM	...
SC01 - B1.0	WISP - PA Reports Generation[SBS_PA_Daily_1.zip]	Candidate	Group 1/B9M5/v1/1	9/26/2024 5:55:36 PM	...

Showing 2 rows

New Process

Processes

Process Datasets

Column Lineage

Admin

Process

Group

Group 1 - Scotia Wealth Management Domain

System

B9M5 - Wealth Information Services & Products (WISP)

Version

1

Stream

Select...

Code

Enter code...

Name

Enter name...

Full Name

Enter full name...

Application Context

Enter app context...

Status

ts Generation[S

reserved.

Status

Enter status...

Asset Type

Enter asset type...

Domain

Enter domain...

Target Load Frequency

Enter load frequency...

Community

Enter community...

Cancel

Save

Process Datasets

Process datasets are source to target mappings of datasets (not columns).

Lineage Pro (Staging)

Groups Systems Datasets Dataset Columns Processes **Process Datasets** Column Lineage Admin

Group 1 / B9M5 / v1

Filter

Process Datasets

+ New

Target Dataset	Source Dataset	URI	Date	
POACLT.txt	GeoCountryMapping.csv	Group 1/B9M5/v1/1/SC01 - B1.0	9/26/2024 5:50:25 PM	...
POACCT.txt	tadts_dcmnt_stts	Group 1/B9M5/v1/1/SC01 - B1.0	9/26/2024 5:25:26 PM	...
POACCT.txt	WISP_TRANS.ACCOUNT	Group 1/B9M5/v1/1/SC01 - B1.0	9/26/2024 5:27:43 PM	...
SBS_PA_Daily_1.zip	POACLT.txt	Group 1/B9M5/v1/1/SC01 - A	9/26/2024 5:01:35 PM	...
SBS_PA_Daily_1.zip	POACLTCT.txt	Group 1/B9M5/v1/1/SC01 - A	9/26/2024 5:03:26 PM	...
SBS_PA_Daily_1.zip	POACCT.txt	Group 1/B9M5/v1/1/SC01 - A	9/26/2024 4:42:37 PM	...

By clicking on New, a data entry interface appears as shown in the following screen shots.

Process Dataset

Process

Group: Group 1 - Scotia Wealth Management Domain

System: B9M5 - Wealth Information Services & Products (WISP)

Version: 1

Stream: Select...

Process: Select...

Dataset

Target Dataset: Select...

Source Dataset: Select...

Description: Enter description...

Data Load Source: Enter data source...

Join Condition: Enter join condition...

Cancel Save

Column Lineages

Column lineages are definitions of source-to-target mappings of columns. As seen by the ellipse next to the “+New” button, this screen also has a bulk upload option.

Action

1. Clicking on ellipse (...) provides bulk upload options

Lineage Pro (Staging)

Groups Systems Datasets Dataset Columns Processes Process Datasets **Column Lineage** Admin

Group 1 / B9M5 / v1 Filter

Column Lineages

Target Dataset	Target Column	Source Dataset	Source Column	Transformation Rule	Transformation Action
POACLT.txt	Province	GeoCountryMapping.csv	COUNTRYISOCODE3	Province= IF COUNTRYISOCODE3 EQ 'USA' OR 'CAN' THEN CODE ELSE " Yes	Complex
POACLT.txt	Country	GeoCountryMapping.csv	COUNTRYISOCODE3	Straight Move	Copy
POACCT.txt	Accredited_Investor_Status	tadts_dcmnt_stts	DCMNT_STTS_DT	SELECT T3.BUSINESSUNIT , T3.SERVICEPKG , T3.ACCOUNTKIND , T3.REGIONNAME , T3.ACCOUNTDESCRIPTION , T3.TRANSFERREQUEST , T3.TENANTINCOMMON , T3.JOINTTENANT , T3.AMOCODE , T3.INVESTMENTOBJECTIVE , T3.TRADINGAUTHORITY , T3.SPOUSECOAPPLICANT , T3.INTERESTEDPARTY , T3.GUARANTOR	Complex

By selecting ‘+New’, the following data entry interface will appear.

Column Lineage

Process

Group

Group 1 - Scotia Wealth Management Domain

System

B9M5 - Wealth Information Services & Products (WISP)

Version

1

Stream

Select...

Process

Select...

Process Datasets

Select...

Target

Column

Select...

Source

Column

Select...

Transformation

Rule

Enter rule...

Transformation

Rule

Enter rule...

Action

Enter action...

Cancel Save