



SAS[®] Business Data Network 3.2: User's Guide

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SAS® Business Data Network 3.2: User's Guide

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Contents

<i>What's New in SAS Business Data Network 3.2</i>	<i>v</i>
<i>Accessibility Features of SAS Business Data Network</i>	<i>vii</i>

PART 1 Usage 1

Chapter 1 • Introduction to SAS Business Data Network	3
What Is SAS Business Data Network?	3
Benefits of SAS Business Data Network	4
Chapter 2 • Accessing SAS Business Data Network	5
Accessing SAS Business Data Network	5
Adding Links to the SAS Data Management Console Home Page	7
Chapter 3 • Understanding the Interface	9
Main Window for Business Data Network	9
View or Edit Term Window	15
Preferences Window	19
Chapter 4 • Working with Terms	21
Adding Terms	21
Defining and Editing Terms	22
Reviewing and Maintaining Terms	25
Approving Collaborative Terms	30
Using Web Search	33
Chapter 5 • Working with Snapshots	39
Creating a Snapshot	39
Viewing a Snapshot	41
Maintaining Snapshots	46
Chapter 6 • Importing and Exporting Terms	49
Importing and Exporting Terms	49
Importing and Exporting Terms in XML	50
Importing Terms from CSV Files	55
Command-Line Processing for Imported Terms	66
Chapter 7 • SAS Business Data Network Administration	69
Managing Term Types	69
Managing Deleted Terms	71
Managing Root Level Authorizations	71

PART 2 Installation and Configuration 75

Chapter 8 • Installing and Configuring SAS Business Data Network	77
Installing SAS Business Data Network	77

Performing SAS Business Data Network Migration	77
Configuring Workflow in SAS Business Data Network	86
Chapter 9 • ASEXPORT Procedure	89
Overview: ASEXPORT Procedure	89
Concepts: ASEXPORT Procedure	90
Syntax: ASEXPORT Procedure	95
Example: Exporting from a DataFlux Authentication Server to a SAS Metadata Server	107

What's New in SAS Business Data Network 3.2

Overview

The main enhancements for SAS Business Data Network 3.2 include the following:

- Ability to Create A Snapshot of Your Data
- Public SAS Business Data Network Application Programming Interface
- Link from an Object in SAS Lineage to SAS Business Data Network
- Ability to Import Terms From CSV Files
- Publish to Relationships Service Option
- Command-Line Application for Importing Terms
- New Term Type Attribute Types

Ability to Create A Snapshot of Your Data

You can now create a snapshot to save a read-only view of your data that is taken at a given time. You can give each snapshot a specific name and description. Then you can view or delete your snapshots whenever you need to. You must have administrative access to SAS Business Data Network to create, view, and delete snapshots.

Public SAS Business Data Network Application Programming Interface

The SAS Business Data Network Application Programming Interface (API) has been approved for public distribution. Documentation of the SAS Business Data Network Application Programming Interface (API) is available at support.sas.com.

Link from an Object in SAS Lineage to SAS Business Data Network

Open Link buttons have been added to the toolbar and to the Details panel in the SAS Lineage 3.2 main window. When you select an object and click **Open Link**, the object is opened in SAS Business Data Network.

Ability to Import Terms From CSV Files

You can now import terms from CSV files.

Publish to Relationships Service Option

A **Publish import results to relationships service?** check box has been added to the Import Terms window. When you select this check box, the results of the import are published to the Relationships service. You can deselect this check box to import terms more quickly.

Command-Line Application for Importing Terms

A batch command-line application that you can use to import relationships into the Relationship service has been added. This application can be used in conjunction with the **Publish import results to relationships service?** check box.

New Term Type Attribute Types

The following attribute types can be added to term types:

- URL
- Date
- RTF

Accessibility Features of SAS Business Data Network

Overview

SAS Business Data Network has not been tested for compliance with U.S. Section 508 standards and W3C web content accessibility guidelines. If you have specific questions about the accessibility of SAS products, send them to accessibility@sas.com or call SAS Technical Support.

Documentation Format

Please contact accessibility@sas.com if you need this document in an alternative digital format.

Part 1

Usage

<i>Chapter 1</i>	
Introduction to SAS Business Data Network	3
<i>Chapter 2</i>	
Accessing SAS Business Data Network	5
<i>Chapter 3</i>	
Understanding the Interface	9
<i>Chapter 4</i>	
Working with Terms	21
<i>Chapter 5</i>	
Working with Snapshots	39
<i>Chapter 6</i>	
Importing and Exporting Terms	49
<i>Chapter 7</i>	
SAS Business Data Network Administration	69

Chapter 1

Introduction to SAS Business Data Network

What Is SAS Business Data Network?	3
Benefits of SAS Business Data Network	4

What Is SAS Business Data Network?

SAS Business Data Network is an application that enables you to manage business terms. It supports a collaborative approach to managing the following information:

- descriptions of business terms, including their requirements and attributes
- related source data and reference data
- contacts (such as technical owners, business owners, and interested parties)
- relationships between terms and processes (such as SAS Data Management Studio jobs, services, and business rules)

By linking terms to business rules and data monitoring processes, SAS Business Data Network provides a single entry point for all data consumers to better understand their data. Data stewards, IT staff, and enterprise architects can use the terms to promote a common vocabulary across projects and business units. Permissions can be set to allow only specific users to access or control the data in Business Data Network.

SAS Business Data Network enables collaboration of domain knowledge between business users, technical users, and data stewards. SAS Business Data Network can be used as a single entry point for all data consumers to better understand their data. It consists of a web user interface that documents business terms and their associated rules, jobs, applications, data, documentation, and other information. Technical users use the network to document information about tables and columns that implement the business terminology. This information can be used to relate jobs and other information to terms and to share knowledge about data transformations. It serves as a data dictionary to describe details of data models and other data-related information. Data stewards can view data from a business standpoint to better visualize problem areas by domain in order to identify and fix data issues more effectively.

Benefits of SAS Business Data Network

SAS Business Data Network enables you to discover, document, and manage a glossary of business terms. The record for a term can include a definition of the term; the networked relationship of the term to other terms; and the relationship of the term to other content such as documents, web pages, tables, and business rules.

Typically, a user who understands the business terminology used in an organization provides the initial information in SAS Business Data Network. This user can also associate documents or rules that describe each term. Import and export features enable a user to quickly populate the SAS Business Data Network with terms. Then, a more technical user can add information related to the network of term. Examples of this information include jobs that are used to modify the term and data that is related to the network of terms. The network of terms is fully integrated with impact analysis to help you understand how your physical data and business processes interrelate. The user interface supports roles, capabilities and security for terms, and term attributes. The roles and capabilities are fully customizable to match your site requirements.

You can enter non-collaborative terms, which do not undergo a review and approval process, or collaborative terms, which are reviewed and approved. Simple collaboration consists of a review for business content and approval. Extended collaboration adds a technical review to the review and approval process.

Collaborative terms are enabled through integration with SAS Workflow Studio. Users can send terms into a collaborative flow for review and approval before publishing. Several default collaborative reviews are available for customization, or you can create your own collaborative reviews to match your business needs. The SAS Business Data Network user interface guides the user through the collaborative review flow for a term. Status is also shown at each step in the review.

You can quickly see collaborative review tasks that are waiting on their input in the Task Manager View in SAS Data Management Console and in views in the network. A number of quick actions enable users to update the review for multiple terms together. Different reviews can be used for different actions in the network of terms. For example, you can have one review that you use when creating terms and another when deleting terms. You can also tie different reviews to different term types. For example, you can have one review when working with supplier information types and a different one for working with your data dictionary tables and columns.

Another important new feature is support for multiple, customized term templates. These templates are defined by creating and editing term types. See [“Managing Term Types” on page 69](#). Administrators are now able to create templates with custom attributes for terms and term hierarchies. You can also determine whether attributes are required and set default values for attributes in a term. Required attributes can be useful if you want to enforce the collection of standard information for every term that is built from the template.

Most of the attributes of a term are now fully customizable via the term type. For example, you might have a set of term types that represent the tables and columns in your data dictionary. You can create a term type for tables with the information that you want to use to describe tables in your system. Then you can create a different column template with the information that you want to capture about columns. You can have any number of custom term types. These term types serve as templates that match the information that you want to capture in your terms.

Chapter 2

Accessing SAS Business Data Network

Accessing SAS Business Data Network	5
Overview	5
Use a Standard URL	5
Connect from the Web Search Tool	6
Connect from SAS Data Management Console	6
Adding Links to the SAS Data Management Console Home Page	7

Accessing SAS Business Data Network

Overview

You can access SAS Business Data Network in the following ways:

- [“Use a Standard URL” on page 5](#)
- [“Connect from the Web Search Tool” on page 6](#)
- [“Connect from SAS Data Management Console” on page 6](#)

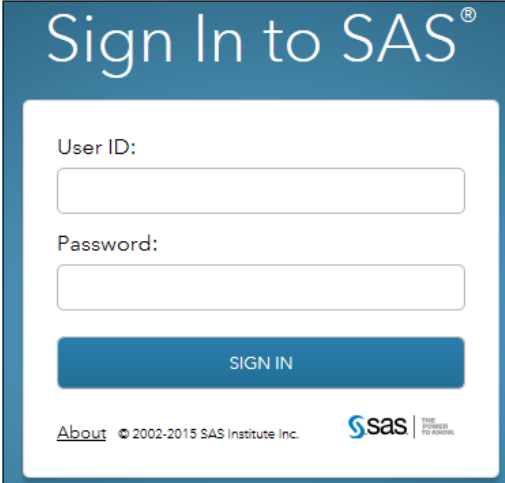
Use a Standard URL

You might have been given a standard URL to use to log on to SAS Business Data Network. This URL follows this pattern: `http://hostname/SASBusinessDataNetwork`. However, the administrator can change the URL during installation.

1. Click the URL that is supplied by your system administrator, or paste it into the address field of your browser.

The Sign In window for SAS web applications is shown in the following display:

Figure 2.1 Sign In Window for SAS Web Applications


 The image shows a web browser window titled "Sign In to SAS". The window has a blue header bar with the text "Sign In to SAS®". Below the header, there is a white rectangular area containing the login form. The form has two input fields: "User ID:" and "Password:". Below these fields is a blue button labeled "SIGN IN". At the bottom of the white area, there is a small "About" link, a copyright notice "© 2002-2015 SAS Institute Inc.", and the SAS logo with the tagline "THE POWER TO KNOW".

2. Enter your user ID and password in the appropriate fields.
Note: Your password is case-sensitive. Your user ID might be case-sensitive, depending on the operating system that is used to host the web application server. If you need assistance, contact your system administrator.
3. Click **Sign In** to access the SAS Lineage in a browser window.
4. To sign off, click **Sign Off** in the upper right corner of the window. If you are prompted about unsaved changes, click **Sign Off** to exit without saving, or click **Continue** to keep working.

Connect from the Web Search Tool

The [Web Search Tool on page 33](#) is a separate web page that contains a field that you can use to search for terms in SAS Business Data Network. You can click a term listed in the search results to display it in SAS Business Data Network.

If you have already logged on to one of the SAS applications, you will be taken directly to SAS Business Data Network. If you have not logged on to a SAS application, you will see the Sign In window explained in [“Use a Standard URL” on page 5](#). Follow the same steps to log on to SAS Business Data Network.

Connect from SAS Data Management Console

Another way to access SAS Business Data Network is to use the standard sign-in window to access the SAS Data Management Console home page. Then you can click the link in the Links section to access the SAS Business Data Network window. If a link to SAS Business Data Network is not displayed in the Links section, ask your administrator to follow the instructions in [“Adding Links to the SAS Data Management Console Home Page” on page 7](#).

The port for all SAS Data Management web components is configured during installation. The default port number is 80. If your site is using the default port for these web components, you can access SAS Data Management Console from the following URL: `http://hostname/SASDataManagement`.

1. Click the URL that is supplied by your system administrator, or paste it into the address field of your browser to display the SAS log on window.

The window is shown in the following display:

Figure 2.2 Sign In Window for SAS Data Management Console


 The image shows a web browser window titled "Sign In to SAS". The window has a blue header with the text "Sign In to SAS®". Below the header is a white rectangular area containing the login form. The form has two input fields: "User ID:" and "Password:". Below these fields is a blue button labeled "SIGN IN". At the bottom of the white area, there is a link "About" followed by "© 2002-2015 SAS Institute Inc." and the SAS logo with the tagline "THE POWER TO KNOW."

2. In the **User ID** field, enter your user ID
3. In the **Password** field, enter the password for your user ID.
Note: Your password is case-sensitive. Your user ID might be case-sensitive, depending on the operating system that is used to host the web application server. If you need assistance, contact your system administrator.
4. Click **Log On** to display the home page for SAS Data Management Console.

Adding Links to the SAS Data Management Console Home Page

An administrator can use SAS Management Console to define a web link to SAS Business Data Network on the SAS Data Management Console home page. The links appear under a Links heading on the home page.

1. Log on to SAS Management Console as an administrator.
2. Expand the following folders on the **Plugins** tab: **Application Management** ⇒ **Configuration Manager** ⇒ **Data Management Cnsle 2.1 Home Page**.
3. Right-click **Data Management Cnsle 2.1 Home Page** and select **Properties**.
4. Click the **Settings** tab.
5. Select **Home Page Settings** in the panel at left.
6. Use the **Home Page Settings** panel to add the URL for the desired web page.
7. Click **OK** to save your changes.

8. Restart the SAS Web Application Server in order for the new URL to show up on the home page for SAS Data Management Console.

Chapter 3

Understanding the Interface

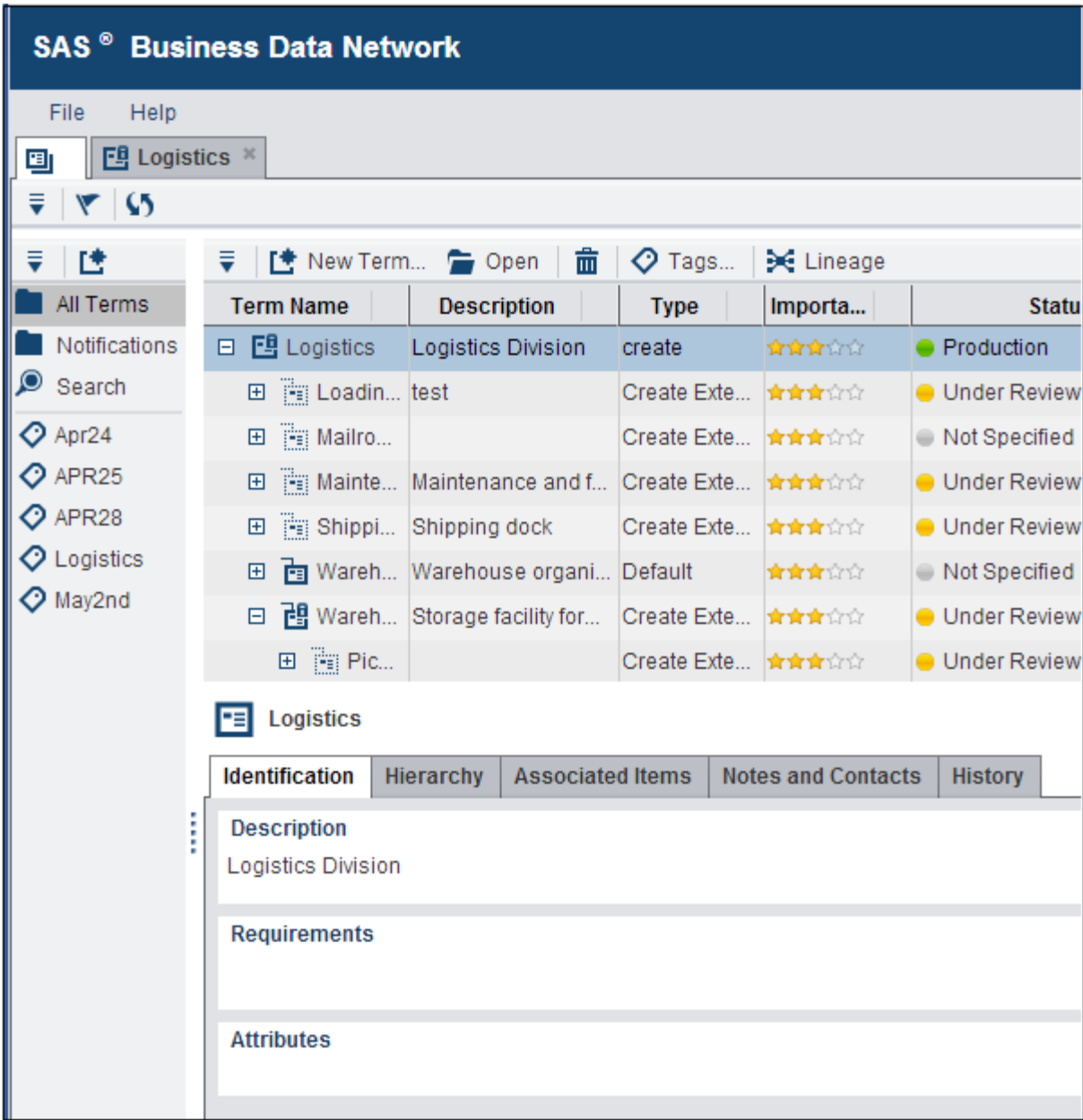
Main Window for Business Data Network	9
View or Edit Term Window	15
Preferences Window	19

Main Window for Business Data Network

You can use the main window for SAS Business Data Network to review and maintain the terms that you have entered in a term list. If your login has been granted appropriate privileges, you can edit terms here. Otherwise, you can only view them.

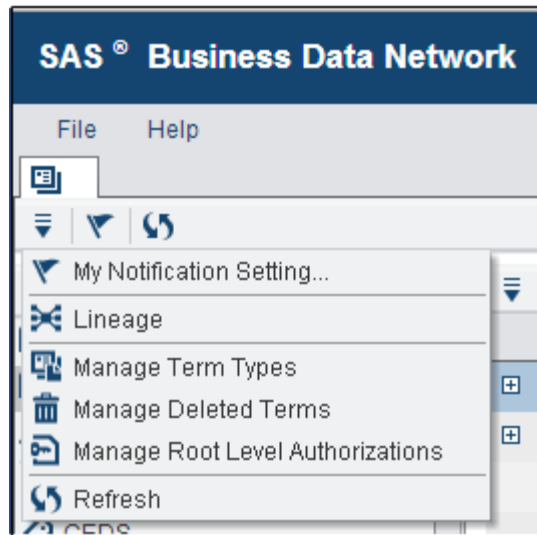
The following display shows a sample SAS Business Data Network main window:

Figure 3.1 Main Window



The **Action** button at the top of the window generates the menu shown in following display:

Figure 3.2 Top Menu

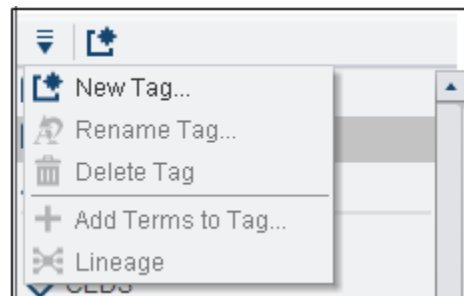


This top menu enables you to perform the following functions:

- Receive notification of new terms or changes to existing terms that specify you as a contact
- Display SAS Lineage
- Display Term Type Manager
- Display Deleted Terms
- Display the Authorization — Root Level window
- Refresh the SAS Business Data Network window

The toolbar above the navigation tree contains an **Action** button and tool buttons, as shown in the following display.

Figure 3.3 Navigation Tree Menu



You can use these tools to create and maintain tags with the following functions:

- Create new tags
- Rename a selected existing tag
- Delete a selected existing tag

- Display the Add Terms to Tag window
- Display a selected tag in SAS Lineage

The navigation tree contains the following elements:

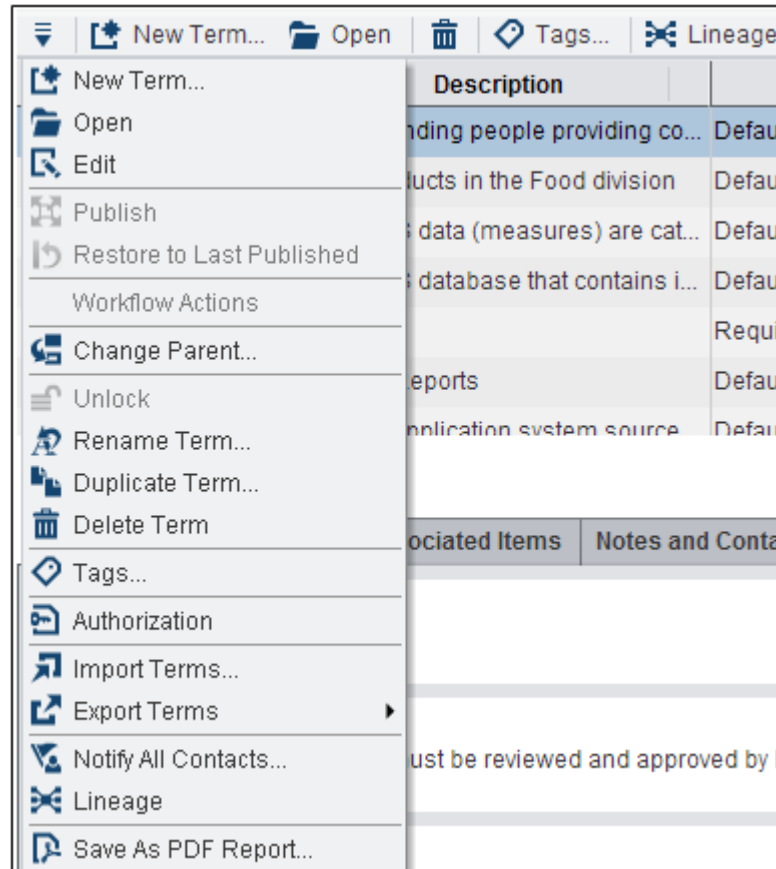
- **All Terms**
- **Notifications**
- **My Drafts**
- **Search**
- **Tags**
- **Filter**

The **All Terms** element displays a list of the non-collaborative terms entered into SAS Business Data Network by the user currently signed in to SAS Business Data Network. The **Total count** displayed on the right side lists the number of top-level terms, but it does not tabulate the number of child-level terms. Therefore, the count does not change when you expand a folder in the term list.

It also displays the terms in collaborative flows for which the current user is a potential or actual owner. Similarly, the **Notifications** element displays a list of the collaborative terms entered into SAS Business Data Network for which the current user is a potential or actual owner. The terms must be created and managed through a collaborative review and approval process. The same restriction applies to the My Drafts view for draft terms in collaborative flows, although it also shows all non-collaborative drafts that the current user has created. See [“Approving Collaborative Terms” on page 30](#) for more information.

The **Action** button and the toolbar above the list are shown in the following display:

Figure 3.4 Terms Menu



These tools enable you to perform the following functions that you can use to manage terms that you select in the list:

- Create a new term
- Open a selected term
- Open and edit a selected term
- Publish a selected term to the workflow
- Restore a selected term to the last published version
- Perform a selected workflow action on a selected term (such as claim and approve or reject changes)
- Select a parent for one or more selected terms (or remove it from a parent to child relationship)
- Unlock a selected term
- Rename a selected term
- Duplicate a selected term
- Delete one or more selected terms
- Display the Manage Tags window
- Display the Authorization window

- Import terms from a file. For information, see [Chapter 6, “Importing and Exporting Terms,”](#) on page 49.
- Export one or more selected terms to a file. For information, see [Chapter 6, “Importing and Exporting Terms,”](#) on page 49
- Send a message to all of the contacts attached to the selected term
- Display a diagram that shows how a selected term is related to other terms, tags, contacts, links, and other external items associated with the term
- Save a selected term as a PDF report that summarizes information about the term

Note that property tabs are displayed below the list of terms for the currently selected term. See [“View or Edit Term Window”](#) on page 15 for descriptions of the tabs.

The **Search** element is shown in the following display:

Figure 3.5 Search Field



The search feature provides a field to search for terms entered into SAS Business Data Network. The function searches the terms' names, descriptions, attribute values, and notes to find matching terms. The subset of terms that matches the search text is displayed in a terms table below the **Search** field. The first result in the list is selected and its property tabs are displayed. All of the term management functions that are enabled for the All Terms list are also available for this list.

The **Tags** element displays the tags that you add to your terms. When you click a tag, the terms list is constrained to display only the terms that are associated with the selected tag.

You can use the Filter element on your list of terms to limit its contents to terms that have specific characteristics.

The **Filter** element is shown in the following display:

Figure 3.6 Filter

The filter feature provides a set of tools that you can use to filter the list of terms. You can filter by term name, type, importance, status, period of last modification, workflow, and user name. Note that you can filter on multiple types, level of importance, and status at once.

If you click a tag and apply a filter to the list of terms associated with the selected tag, you can filter those terms. The **Total count** displayed on the right side lists the number of terms that are associated with the selected tag. This list can include both parent and child terms. Because all of the terms associated with the selected tag are included in the filtered list, opening a parent-level term does not change the count.

View or Edit Term Window

You can use this window to view or edit a term that you selected from the term table in the main SAS Business Data Network window. The View window appears when you perform one of the following actions:

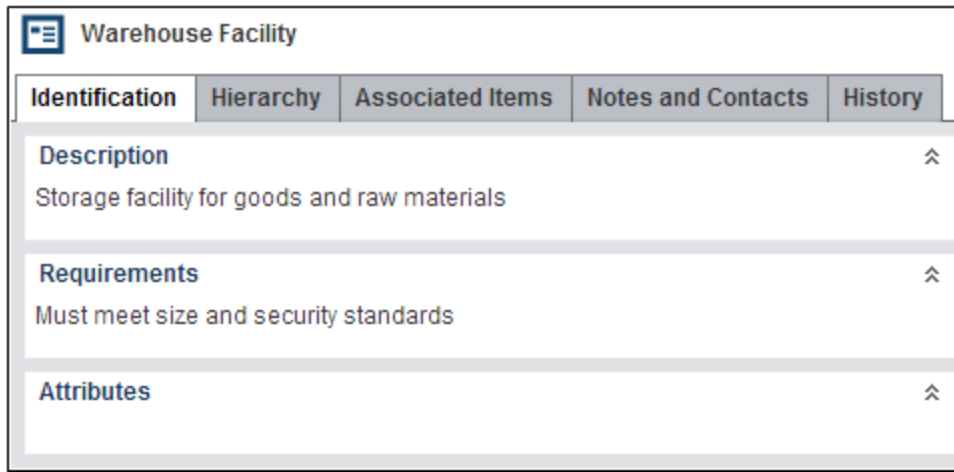
- Double-click a term
- Select a term and press Enter
- Select a term and click **Open**

You can click **Edit** to work with the term in the Edit window. You can also launch the Edit window directly by selecting a term, clicking the **Actions** button, and clicking the **Edit** item in the pop-up menu.

When you open a term, you display a series of tabs that contain information and settings that are related to the selected term.

The following display shows the tabs available in the View window for the term *Warehouse Facility*:

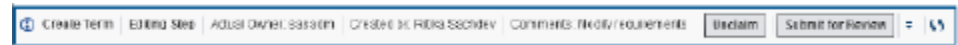
Figure 3.7 View Window Tabs



A collaborative term displays the same tabs, but it also contains an approvals toolbar.

The following display shows an example of an approvals toolbar:

Figure 3.8 Collaborative Flow Status Toolbar



You can use this toolbar to claim and unclaim a term. You can also perform a variety of task-appropriate actions, such as rejecting terms, adding comments, and submitting terms for approval. You can add comments when you click transitional steps in the flow, such as **Submit for Approval**.

The following tabs are available from this window:

- **Identification**
- **Hierarchy**
- **Associated Items**
- **Notes and Contacts**
- **History**

The **Identification** tab is displayed in both the View window and the Edit window. Note that the preceding display shows only the left side of this tab. More detailed information is shown on the right side. The tab contains the following elements:

Description

Enables you to review or enter a text description of the term. For example, the description of the term *Warehouse* can be entered as *Storage facility for goods and raw materials*.

Requirements

Enables you to view or enter detailed requirements related to the term. For example, the requirements for *Warehouse* can be entered as *Must meet size and security standards*.

Attributes

Enables you to review or specify attributes for the selected term. These attributes are determined by the term type, which is set in the **Details** section of the **Identification** tab. For example, the *Warehouse* term has a type of *Create Extended*.

Details

Enables you to view detailed information about the term, such as Type, Status, Importance, and a Locked by indicator. The default status indicators include the following: Production, Editing, On Hold, Under Review, and Not Specified. For example, *Warehouse* has a status of *Under Review*. The **Locked by** value is updated only by other actions that lock or unlock the term.

Links

Enables you to review or add links to external sources to the term. These links can provide access to background or conceptual information about the term. You can also edit or delete existing links in the Edit window .

Tags

(View window only) Enables you to review or add a tag to the term that clarifies the content of the term and its relationship to other terms. For example, you could add the *Logistics* tag to the term *Warehouse*.

Related Terms

(View window only) Enables you to review or connect the selected term to related terms. For example, *Mailroom* is entered as one of the related terms to *Warehouse*.

The **Associated Items** tab is available in the View and Edit windows. In the View window, it displays the items that you have associated with the selected term. In the Edit window, you can add and maintain associations with items. These items can also come from or be imported from other data management applications that can export items in a compatible format. Some of the items that can be associated are shown in the following list:

- collections
- data jobs
- fields
- process jobs
- profiles
- reference data domains
- rules
- SAS columns
- SAS jobs
- SAS libraries
- tables
- tasks
- work tables
- transformations

The full list of possible associations is available in the Add Other Items from Lineage window that you use to search for associations.

The **Notes and Contacts** tab is available in the View window. The Add Contact window enables you to add contacts with an interest in or responsibility for the term, such as a

Warehouse Manager. You can also manage the existing contacts, send messages out to the full contacts list, and set your notification setting.

You can add text notes to the term in the New Note window. You can also edit or delete an existing note.

The **Hierarchy** and **History** tabs also are displayed only in the View window. The **Hierarchy** tab displays the selected term in its hierarchical position. The **History** tab displays a list that includes the creation of the term and all of its modifications. Each item in the list is given a version number. You can select an item and click **Restore** to return the term to that version and its contents. The draft of a term starts with version 0.1. The number keeps increasing until you publish the term. Then, the term is designated as version 1.0.

The following display shows the tabs available in the Edit window for the term *Warehouse Facility*:

Figure 3.9 Edit Window Tabs

The screenshot shows the 'Warehouse Facility' Edit window. The window has a title bar with the text 'Warehouse Facility' and a close button. Below the title bar is a menu bar with options: View, Edit, Save Draft, Publish, and Lineage. The 'Edit' tab is currently selected. The window is divided into several sections:

- Identification** and **Associated Items** tabs are visible at the top.
- Description:** A text area containing 'Storage facility for goods and raw materials'.
- Requirements:** A text area containing 'Must meet size and security requirements'.
- Attributes:** A section with two buttons: 'New Attribute...' and 'Manage Attributes...'. Below these are four attribute types:
 - Single Line Text Entry Label:** A text field with the value 'This is a single line of text'.
 - Multi-Line Text Entry Label:** A text area with three lines of text: 'line1', 'line2', and 'line3'.
 - Single Selection Label:** A dropdown menu with the value 'yes'.
 - Multiple Selection Label:** A checkbox list with 'hiking' checked.
- Related Terms:** A section on the right side of the window.
- Tags:** A section on the right side of the window.
- Links:** A section on the right side of the window with a button '+ Add Link...'.
- Importance:** A section on the right side of the window with a star rating of 4 stars and the text 'Med'.
- Status:** A section on the right side of the window with a radio button labeled 'Not Specified'.
- Type:** A section on the right side of the window with the text 'Default'.

Preferences Window

You can click **Preferences** in the **File** menu to specify user locale, theme, and display preferences for SAS Business Data Network.

Chapter 4

Working with Terms

Adding Terms	21
Overview	21
Add a New Term	21
Defining and Editing Terms	22
Reviewing and Maintaining Terms	25
Overview	25
Review Terms	25
Add Notes and Contacts to the Term	26
Maintain Terms	27
Approving Collaborative Terms	30
Overview	30
An Example of Approval Processing	30
Using Web Search	33
Overview	33
Satisfy Prerequisites	33
Search for a Term	33
Configure Your Browser to Use Search Extras	37

Adding Terms

Overview

If you are registered on the SAS Business Data Network server, then you can add and define terms in the **Edit** window. If you are not registered on the server, then you can read terms only in the **View** window.

When you add a term, you specify a name, type, and a position in the hierarchy. You can either add a new term as a child to an existing term or add a term without specifying a parent term. The term appears in the All Terms list. Then, you can open the term in the View window and define it in its property tabs in the Edit window. For the term definition process, see [“Defining and Editing Terms” on page 22](#).

Add a New Term

1. Click **All Terms** in the navigation tree to display the All Terms list.

2. (Optional) Review the All Terms list to determine where the new term will reside in the hierarchy. You can skip this step if you know that the new term will be a top-level term.
3. Click on the name of the parent term in the All Terms list.
4. Click **New Term** in the toolbar above the list.
5. Enter the new term in the **Name** field. For example, you can enter *Warehouse Facility* as your new term.
6. Select the **Add as child to** check box. Note that this check box is optional. You can leave it deselected and not add the new term as a child to an existing term.
7. Select the parent term in the Select Terms window. Then, click **OK** to save the selection. The parent term for *Warehouse Facility* is *Logistics*.
8. The parent term that you selected is shown in the **Add as child to** field. In this example, the parent term is **Logistics**. The value in the **Type** field is set when you select the parent term. The warehouse term takes the **Create Extended** type.

Note: If you do not add your term as a child to an existing term, you must select an appropriate term type in the **Type** field. The value in the **Type** field is initially set to the default term type. When you select a term type, the value in the **Type** field is set to that selection for future terms unless you change it.
9. Click **OK** to save the new term and display it in the SAS Term edit window. See [“Defining and Editing Terms” on page 22](#) for information about defining the term.

If appropriate, you can also select a tag in the pane on the left side of the window to associate the new term with the tag.

Defining and Editing Terms

Newly added terms are immediately displayed in the SAS Term edit window. You can define the term by working through its property tabs. You can also access the SAS Term edit window by selecting an existing term, clicking the **Action** button, and clicking the **Edit** item in the pop-up menu.

Click the **Identification** tab to define the parameters for the term. Perform the following steps to define a term, such as *Warehouse Facility*.

1. Enter a description for the term, such as *Storage facility for goods and raw materials*.
2. If appropriate, enter any requirements for the term, such as *Must meet size and security standards*.
3. If the term type for the term supports custom attributes, you can add attributes to the term or manage existing attributes. Otherwise, terms inherit the attributes set for their term types and new attributes cannot be added. For information about term types, see [“Managing Term Types” on page 69](#).

The following existing attributes are available for term types that support them:

- MultiLineText
- SingleLineText
- MultiSelect
- SingleSelect

- Boolean
- Date
- URL
- RichText

If the term type does support new attributes, click **New Attribute** in the **Attributes** section tab to access the New Attribute window. You can enter a label, instructions, and value. You can also specify whether the attribute is required. You can use the toolbar in the Manage Attributes window to add, edit, move, and delete attributes. Note, however, that highlighted attributes created in rich text do not display the highlighting in SAS Business Data Network. SAS Business Data Network does not have the capacity to store the highlighting.

4. Specify details for the term. For *Warehouse Facility*, the type is *Create Extended*, the status *Under Review*, and importance *Medium*.
5. If appropriate, add links to internal or external sources such as websites.
6. If appropriate, add related terms from SAS Business Data Network, such as *Mailroom* and *Picking*. You can select more than one term at a time.

Note: If you need to add notes and contacts, tags, or related terms, you click **View** to open the term in the View window. These functions are not available in the Edit window.

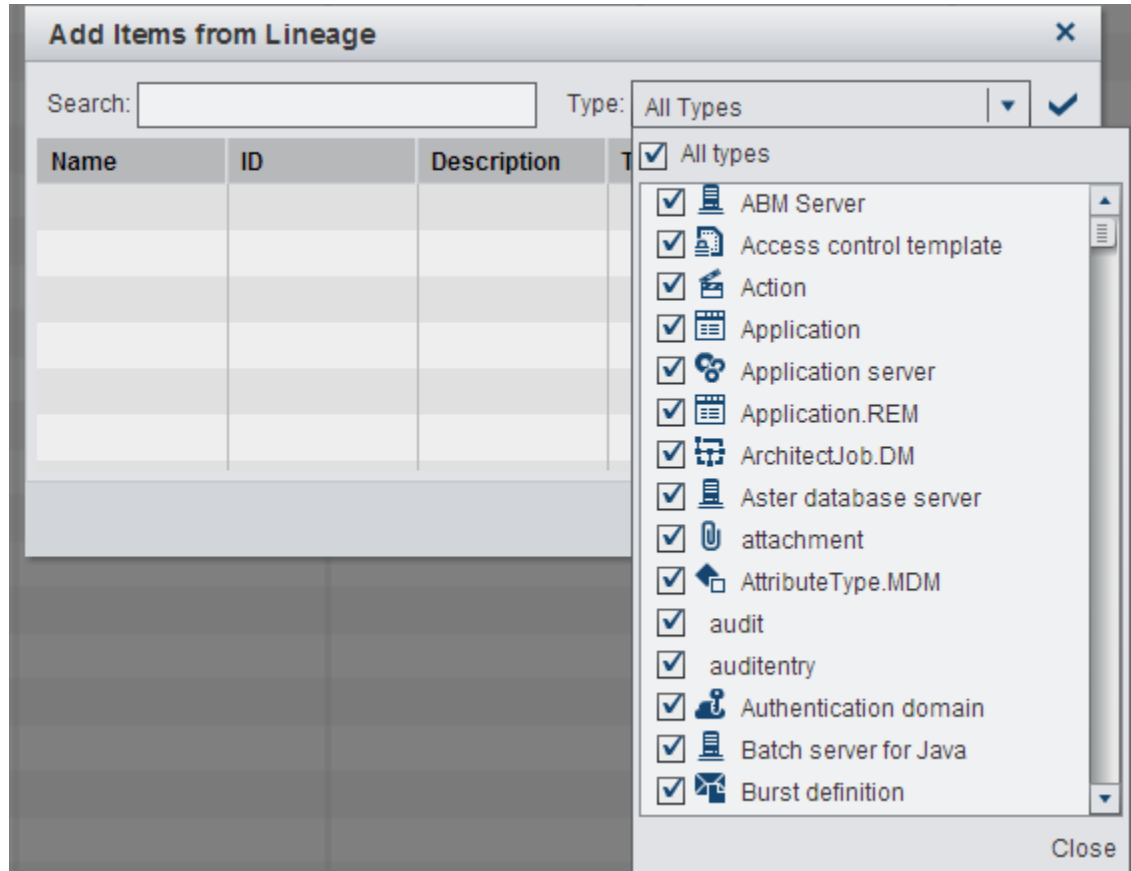
You can also click the **Associated Items** tab to view or edit the items that you have associated with a selected term.

Perform the following steps on a term that you opened and placed in Edit mode:

1. Click **Add Items** to access the Add Items from Lineage window.

This window is shown in the following display:

Figure 4.1 Add Items from Lineage Window



2. For this example, leave the **Search** field empty and set the **Type** to **All types**. The search results include an unfiltered list of all of the items that are available to associate with the selected term.
3. Click **Apply** to run the search and see the results.
4. Select the items that you want to add as associated items. You can use shortcuts such as Control-A, Shift-Click, and Control-Click to select multiple items.
5. Click **OK** to return to the Edit mode for the selected term and add the selected associated terms in the **Associated Items** tab. You can use the items in the **Associated Items** toolbar to perform the following functions when the selected term is open in Edit mode:
 - Add items
 - Delete items
 - Add a note to a selected item
 - Display a lineage diagram in SAS Lineage for a selected item. For more information, see the *SAS Lineage: User's Guide*.

You can also double-click a selected associated item to see more detailed information about the item.

If your term is a non-collaborative term, you can save it as draft or publish it. Click **Save Draft** to save a private version of the term to the terms list that only you can review and edit. Click **Publish** to save the term to the terms list for any user to review and edit.

If your term is a collaborative term, click **Save Draft** to save the term. If you are ready to submit it for review and approval, you can use a separate **Submit for Review** action.

Reviewing and Maintaining Terms

Overview

You can review and maintain SAS Business Data Network by using the tools included in the SAS Business Data Network main window. Perform the following tasks:

- “Review Terms” on page 25
- “Add Notes and Contacts to the Term” on page 26
- “Maintain Terms” on page 27

Review Terms

You can quickly review your terms in the All Terms list at the top of the screen.

A portion of an All Terms list is shown in the following display:

Figure 4.2 All Terms List

Term Name	Description	Type	Import...	Status	Workflow	
Logistics	Logistics Division	create	★★★★☆	● Producti...		
Loading...	test	Create Extend...	★★★★☆	● Under R...	Extended Cre...	
Wareho...	Warehouse organization	Default	★★★★☆	● Not Spe...		
Wareho...	Storage facility for goods...	Create Extend...	★★★★☆	● Under R...		

You can filter and search this list with the **Filter** and **Search** buttons in the pane on the left side of the window. You can click a tag in the pane to constrain the list to items associated with the tag.

Also, you can select a term in the list and review its property tabs at the bottom of the screen.

The **Identification** tab for the term *Warehouse Facility* is shown in the following display:

Figure 4.3 Identification Tab

Warehouse Facility

Identification | Hierarchy | Associated Items | Notes and Contacts | History

Description ⌵
Storage facility for goods and raw materials

Requirements ⌵
Must meet size and security standards

Attributes ⌵

Details ⌵
Type: Create Extended
Status: ● Under Review
Importance: ★★☆☆ Medium
Locked by: [SAS Administrator](#)

Links ⌵

Tags [Edit](#) ⌵
📍 [Logistics](#)

Related Terms [Edit](#) ⌵
📦 [Shelving Rack](#)

For information about the content of the tabs, see the SAS Business Data Network main window Help. The **History** tab displays a list that documents when the term was created and modified. Each change is listed as a version. You can select a version and click **Restore** to return to the selected version. For example, if you added an associated item to a term in version 2, you can select version 1. Then you can click **Restore** to return to the version of the term without the added associated item.

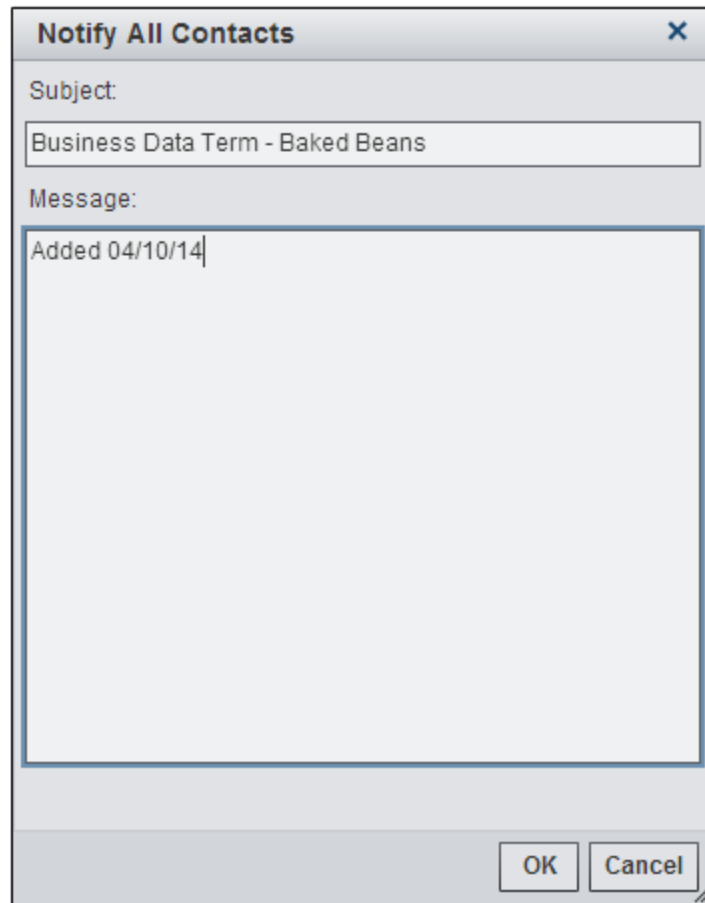
Notes and contacts, hierarchy information, related terms, and tags are added to the term and remain there until removed. They are not related to versions and are not removed if a previous version is restored.

Add Notes and Contacts to the Term

Click the **Notes and Contacts** tab for a term in the All Terms list to add notes and contacts to the term. You can click the **Action** button for contacts to manage a term's contacts. You can also send a message to all of the contacts in the contacts list or turn your term notifications on or off.

The following display shows a contacts notification message:

Figure 4.4 *Notify All Contacts Window*



This notification can be sent only to contacts defined with an email address.

The **Notes and Contacts** and **History** tabs are not used to define terms.

Maintain Terms

Overview

You can use the options under the **Action** button and the buttons on the toolbar to maintain the terms in SAS Business Data Network. Perform the following tasks:

- “[Create a Tag and Add It to Terms](#)” on page 27
- “[Change the Parent of a Term](#)” on page 28
- “[Save a PDF Report for a Term](#)” on page 28
- “[Perform General Term Maintenance](#)” on page 29

Create a Tag and Add It to Terms

You can add a tag to the list that is displayed in the SAS Business Data Network main window. You can also associate this tag with any other term in SAS Business Data Network. When you click the tag, only the tagged terms are displayed in the terms list.

1. Click **Tags** in the toolbar.

2. Enter the name of the tag in the **Name** field. For example, you can create a tag named *Logistics*.
3. Click **OK** to create the new tag.
4. Verify that the new tag is added to the tags in the left pane of the SAS Business Data Network main window.

You can also select a tag. Then, you can click the **Action** button in the pane on the left of the SAS Business Data Network main window to perform the following maintenance functions on the tag:

- Rename the selected tag
- Delete the selected tag
- Add terms to the selected tag
- Open SAS Lineage for a tag

You can use the following methods to add terms to a selected tag:

- Select the terms that you want to add in the terms list and drag and drop them onto the desired tag in the left pane of the riser. For example, you can select the *Warehouse Facility* term and drop it onto the *Logistics* tag. The terms are then added to the tag.
- Click the **Action** button above the tags in the left pane. This method is useful when you need to see a listing of all the available terms when you add terms to a tag. You can search and filter the full list in the dialog box before you make your selection.

Change the Parent of a Term

You can change the parent of a term to move it to a different position in the terms hierarchy.

1. Select one or more terms that you want to move from the terms list.
2. Click the **Action** button above the list and click **Change Parent** in the pop-up menu.
3. Make sure that the **Select a parent** option is selected in the Select Parent window. You can select the **No parent** option if you want the term to reside at the top level of the terms hierarchy.
4. Navigate to the term that you want to select as the new parent. You can use search, filter, and tagging functions to reduce the number of terms displayed in the **Terms** field. For example, you can select the term *Warehouse Facility* as the new parent for *Loading Dock*. Then, click **OK** to save the change. The term *Loading Dock* has moved from under *Logistics* to under *Warehouse Facility*.

You can also select one or more terms in the terms list and drag them onto another term in the list. The dragged terms become child terms of the term that you drop them onto.

Save a PDF Report for a Term

You can save a PDF report that contains summarized information about a selected term. Select a term and click **Save as PDF Report** in the **Action** button pop-up menu above the terms list. Only western European characters are displayed properly in the output of a PDF report.

The Format Report window enables you to select from the following report sections:

- Attributes
- Hierarchy

- Associated Items
- Contacts
- Notes
- History

Select sections here and a destination in the next dialog box.

A portion of the output is shown in the following display:

Figure 4.5 PDF Output

Term: Warehouse Facility
06/17/14 02:29:49 PM

Status: Under Review
Importance: Medium
Description: Storage facility for goods and raw materials
Requirements: Must meet size and security standards
Links:
Tags: Logistics
Related terms: Shelving Rack

Hierarchy
Parent term: Logistics
Sibling term: Loading Dock, Warehouse
Child term:

History

Version	Modified	User	Details
0.1	06/17/14 01:59:00 PM	SAS Administrator	Created
0.2 (current draft)	06/17/14 02:06:36 PM	SAS Administrator	Modified: descr

Perform General Term Maintenance

A group of term maintenance functions are displayed among the options in the pop-up menu that is displayed when you click the **Action** button.

The following functions are available:

Unlock

Removes the lock on a selected term that is locked to the current user.

Rename Term

Enables you to change the name of the selected term.

Duplicate Term

Enables you to duplicate the selected term.

Delete Term

Marks one or more selected terms from SAS Business Data Network for deletion.

Approving Collaborative Terms

Overview

Collaborative term review and approval enables you to divide the responsibilities for creating, reviewing, and approving terms among the members of your team. In this way, each role can be fulfilled by the most qualified member of the group. Each person participating in the collaborative process must be assigned the appropriate permissions for the role. For more information about permissions, see [“Managing Root Level Authorizations” on page 71](#).

You can enable collaboration by selecting the appropriate term type in the **Type** field when you create a term. The Term Type Manager window contains fields that enable you to specify optional workflows that support creating, editing, and deleting terms. You can specify default status values and importance labels for each term type. You can also use the **Business Roles** section create groups of specific users for notifications. For more information about term types, see [“Managing Term Types” on page 69](#).

Note: These workflows must be configured for your instance of SAS Business Data Network. See [“Configuring Workflow in SAS Business Data Network” on page 86](#).

An Example of Approval Processing

Overview

The processes to conduct simple and extended collaborative term review approval are identical, except for the inclusion of a technical review component in the extended version. Therefore, the following example of extended processing illustrates the simpler process. The extended process contains the following stages:

- [“Term Creation” on page 30](#)
- [“Collaborative Term Review and Approval Functions” on page 32](#)
- [“A Sample Collaborative Flow” on page 32](#)

Term Creation

Follow the process described in [“Adding Terms” on page 21](#) to create the term. Be sure to select the appropriate **Type** to specify the type of collaborative term flow that you want to use.

The *Shelving Rack* term needs both a business review and a technical review, so the type selected is Create Extended, as shown in the following display:

Figure 4.6 Extended Review Process Term

New Term

Name:

☒ Add as child to:

...

Type: ▼

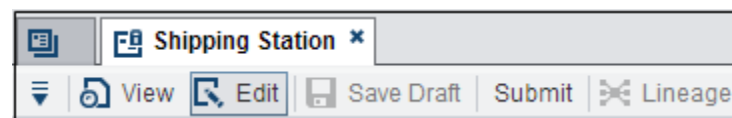
OK Cancel

Now you can define the term and click **Submit** in the toolbar to add it to the collaborative term flow. All of the users who have been added as contacts to the term are notified by email when the term is created or changed. You can define default contacts on a term type, and those contacts will be added initially to all new terms of that type. Email is enabled by default for SAS Business Data Network. However, you can enable or disable email notifications that being sent to you when you are logged in.

Note that the **Create Extended** term type is not a default term type. It was created using the process described in “[Managing Term Types](#)” on page 69.

The toolbar is shown in the following display:

Figure 4.7 Terms Toolbar



The term is also added to the Notifications list for these users. The Notifications view contains terms in collaborative flows for which the current user is a potential or actual owner. The current user does not have to have been added as a contact for the term.

The following display shows the list:

Figure 4.8 Notifications List

<div> <div>▼</div> <div>New Term...</div> <div>Open</div> <div></div> <div>Tags...</div> <div>Lineage</div> </div>					
Term Name	Description	Type	Importan...	Status	
<div>+</div> <div>Shelving Rack</div>	Shelving Rack in a warehous...	Create Extended	★ ★ ★ ☆ ☆	● Editing	

Collaborative Term Review and Approval Functions

You can process a term through a collaborative flow by using the functions listed in the following table:

Table 4.1 Collaborative Term Review and Approval Functions

Function	Action	Result
Claim a term for processing	Click Claim	Provides access to term in collaborative workflow.
Release a term from processing	Click Unclaim	Returns term to terms list without changing its status.
Reject a proposed term	Click Reject	Marks a term as rejected but leaves it in the terms list to be deleted or submitted.
Clears changes made to a term	Click Clear	Discards unpublished drafts for a term and restores the term to its last published version.
Delete a term	Click Delete	Marks a term for deletion.
Submit a term for review	Click Submit for Review	Places term in the collaborative flow for business or technical review.
Approve a term in its current state	Click Approve Changes	Places term in the collaborative flow.
Approve the term and publish it to the terms list	Click Publish	Removes term from the collaborative flow and publishes it to the terms list.

A Sample Collaborative Flow

This example follows the *Shelving Rack* term through an extended collaborative flow.

1. Select the *Shelving Rack* term.
2. A business approver clicks **Claim** to claim the term for processing in the Business Review Step.
3. A business approver clicks **Approve Changes** to approve the term in the business review. The term is passed to the Technical Editing Step.
4. A technical editor clicks **Claim** to claim the term for processing in the Technical Editing Step.
5. A technical editor clicks **Submit for Review** to move the term to the Technical Review Step.
6. A technical approver clicks **Claim** to claim the term for processing in the Technical Review Step.
7. A technical approver clicks **Publish** to remove the term from the collaborative flow and add it to the terms list with a Production status.

Using Web Search

Overview

The Search tool enables you to search for SAS Business Data Network terms in a web browser with a web-based search tool. You can use this tool to search for terms without opening and logging on to SAS Business Data Network.

You can also add a bookmarklet for Search to your supported browser and register Search as a search provider with your browser. These features give you easy access to Search. Perform the following tasks:

- “Satisfy Prerequisites ” on page 33
- “Search for a Term ” on page 33
- “Configure Your Browser to Use Search Extras ” on page 37

Satisfy Prerequisites

In order to use Search, you must satisfy the following prerequisites:

- Install a supported browser. The search tool should render and function correctly in Internet Explorer 8 (Windows XP) and Internet Explorer 9 (Windows Vista or later). The search tool should also work for the latest releases of Mozilla Firefox and Google Chrome for Windows PC.
- Enable JavaScript in your browser.
- Install SAS Business Data Network.
- Ensure that your users have been placed in the proper groups to use Search and that appropriate permissions have been granted.

Search for a Term

1. Open the web page for SAS Business Data Network - Search. The URL for the page uses the following pattern: `<server name>:<port number>/SASBusinessDataNetwork/search`.

The following display shows the Log On page:

Figure 4.9 Search Log On Page

A screenshot of the SAS Log On page. The page has a dark blue background. At the top right, there is a link labeled "About". Below it, the SAS logo is displayed next to the tagline "THE POWER TO KNOW.". The main heading "Log On to SAS®" is prominently displayed. Below the heading, there are two input fields: "User ID:" and "Password:". A blue "Log On" button is positioned below the password field. At the bottom of the page, the copyright notice "Copyright © 2002 - 2013 by SAS Institute Inc., Cary, NC USA" is visible.

[About](#)

Log On to SAS®

sas. | THE POWER TO KNOW.

User ID:

Password:

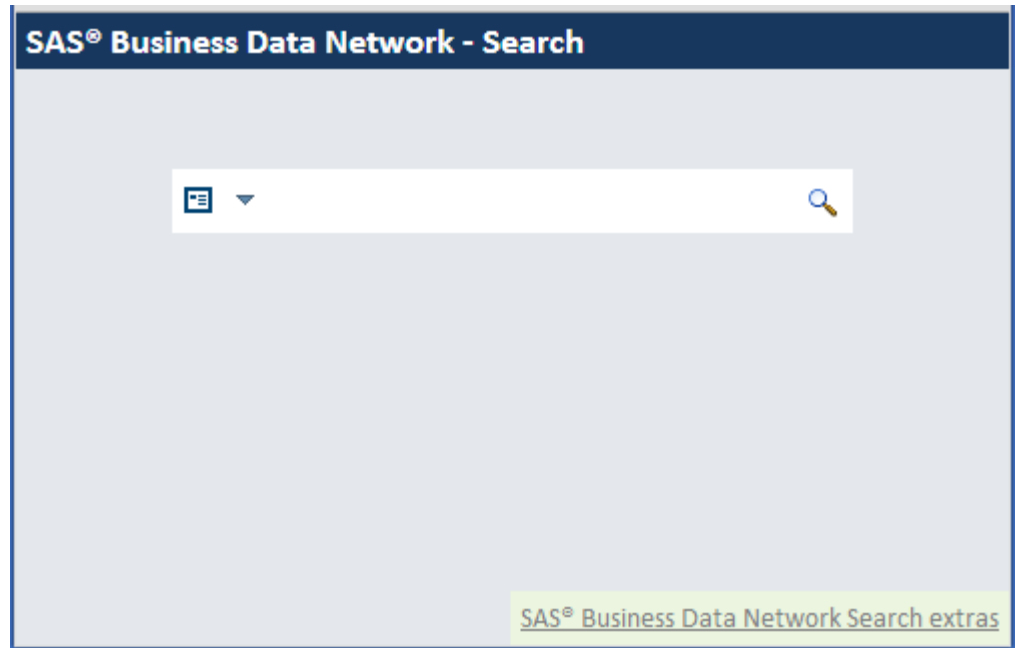
Log On

Copyright © 2002 - 2013 by SAS Institute Inc., Cary, NC USA

Enter your credentials in the **User ID** and **Password** fields to sign on to the Search page.

2. The following display shows an empty Search page:

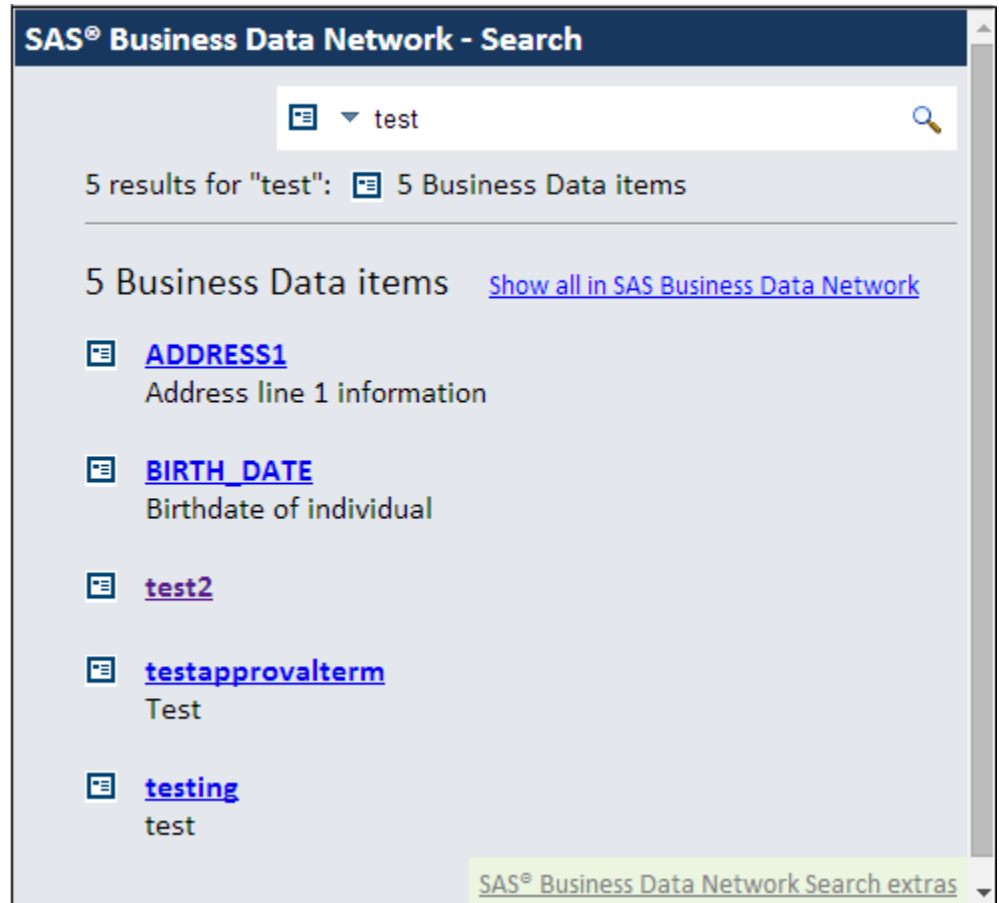
Figure 4.10 Empty Search Page



3. Enter a search term in the **Search Business Data Network** field. For example, you could enter *test* as the search term. Note that **Search Business Data Network** is installed as the default search provider.
4. Click **Search**.
5. Review the search results.

The results are shown in the following display:

Figure 4.11 Search Results



- Click the link for the result that you need to see in SAS Business Data Network. You can also click **Show all in SAS Business Data Network** to see all of the results displayed in SAS Business Data Network.

These show-all results are shown in the following display of the SAS Business Data Network page:

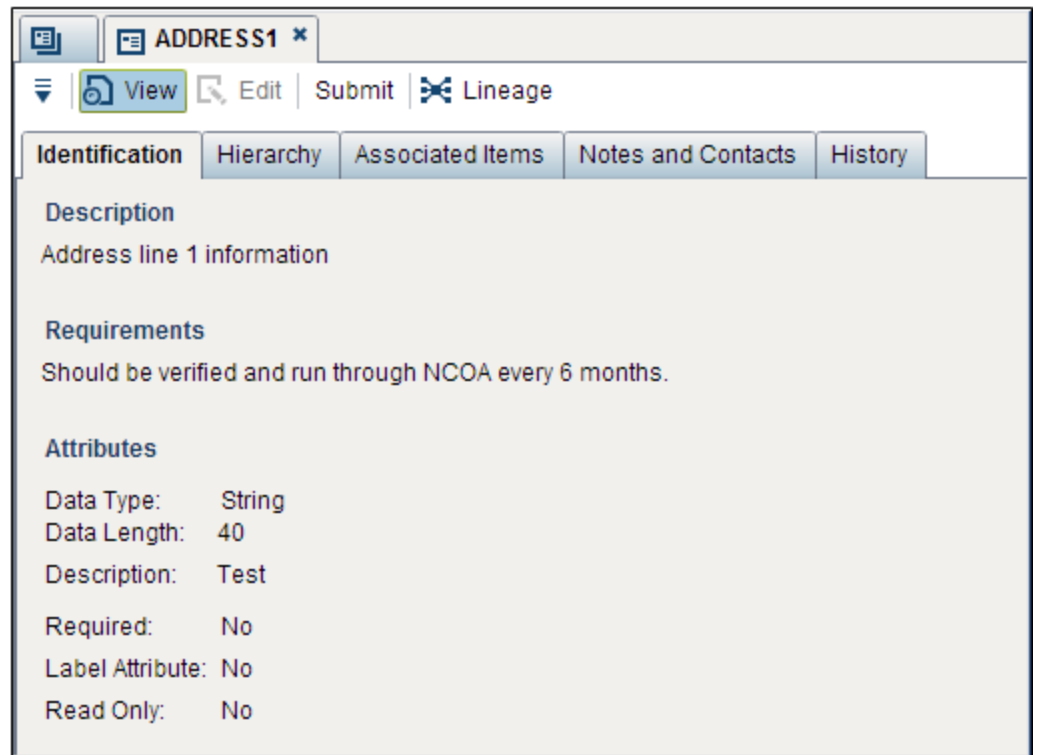
Figure 4.12 All Results List

<div> <div></div> <div>New Term...</div> <div>Open</div> <div></div> <div>Tags...</div> <div>Lineage</div> </div>			
Term Name	Description	Type	Import...
ADDRESS1	Address line 1 information	MDM Attribute	★★★★★
BIRTH_DATE	Birthdate of individual	MDM Attribute	★★★★☆
test2		D&G Data So...	★★★★☆
testapprovalterm	Test	Require Appro...	★★★★☆
testing	test	Require Appro...	★★★★☆

- Return to the Search page and click a single result, *Address1*.

This result is shown in SAS Business Data Network in the following display:

Figure 4.13 Single Search Result



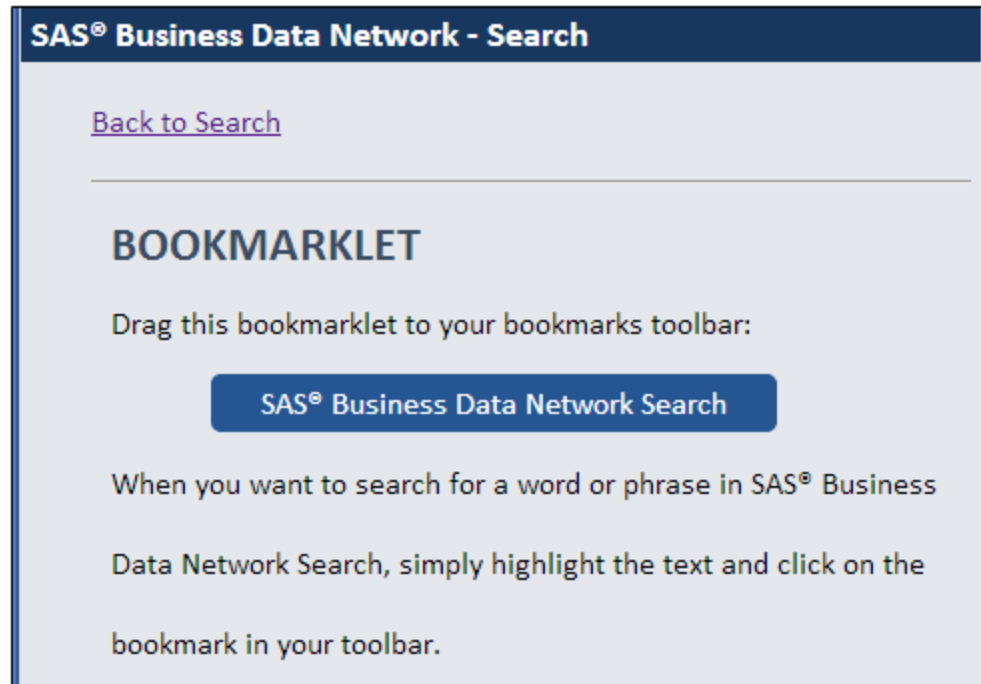
Configure Your Browser to Use Search Extras

You can use the tools in the SAS Business Data Network Search Extras page to make it easier to access Search with a supported browser.

You can add the bookmarklet shown in the top half of the page to the bookmarks toolbar in Microsoft Internet Explorer and Google Chrome browsers.

The bookmarklet is the blue object that shown in the following display:

Figure 4.14 Bookmarklet Section of Extras Page



Simply drag and drop the object into the bookmarks toolbar of your Microsoft Internet Explorer, Google Chrome, or Mozilla Firefox browser. Depending on the browser, a dialog box might be displayed. For example, Internet Explorer displays a confirmation dialog box. Then, you can click **Yes** to add a **SAS® Business Data Network** link. That link takes you directly to the Search page.

The bookmarklet for these browsers enables you to do the following:

- Highlight a word or phrase on any HTML web page, including pages outside of SAS Business Data Network pages.
- Click the bookmarklet to instantly open a new browser tab directly to the SAS Business Data Network results page. (You might need to sign in if you have not done so recently.)
- Click the bookmarklet without highlighting a word or phrase to open the SAS Business Data Network Search page.

In Internet Explorer, the icon for Search is included in the set of search providers included with the search field, as shown in the following display:

Figure 4.15 Search Providers in Internet Explorer



You can remove the search provider from Internet Explorer through the following menu path: **Tools** ⇒ **Manage add ons.** ⇒ **Search Providers**. To remove the search provider for Chrome, select **Settings** ⇒ **Search** ⇒ **Manage search engines**. Simply delete the search button from the Firefox search toolbar.

Chapter 5

Working with Snapshots

Creating a Snapshot	39
Overview	39
Create a Snapshot	39
Viewing a Snapshot	41
Overview	41
Search for Terms	42
Filter by Tags	43
Review and Export Term Types	44
Review and Export Terms	46
Maintaining Snapshots	46

Creating a Snapshot

Overview

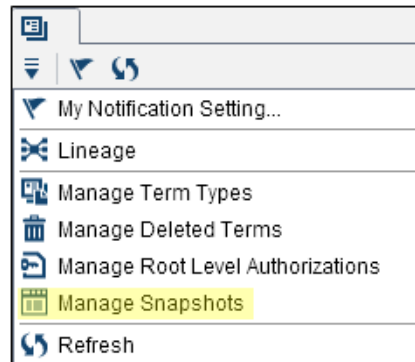
If you are an administrator in SAS Business Data Network, you can create a snapshot to save a read-only view of your data that is taken at a given time. You can give each snapshot a specific name and description. Then you can view or delete your snapshots whenever you need to. You must have administrative access to SAS Business Data Network to create, view, and delete snapshots.

Create a Snapshot

1. Click the **Action** button at the top of the SAS Business Data Network window.
2. Click **Manage Snapshots** in the **Action** menu.

The **Action** menu is shown in the following display:

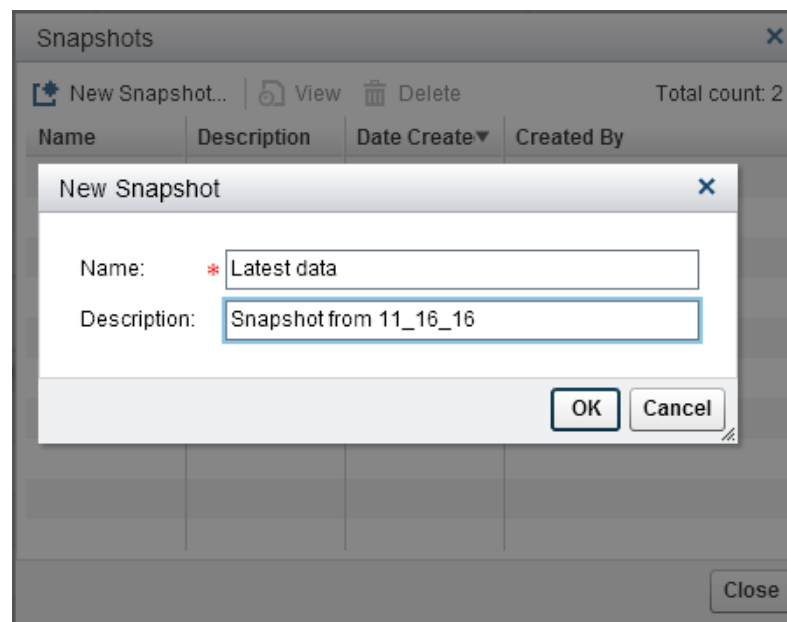
Figure 5.1 Action Menu



3. Click **New Snapshot** in the Snapshots window.
4. Name the new snapshot in the New Snapshot window. You can also add an appropriate description.

The **New Snapshot Window** menu is shown in the following display:

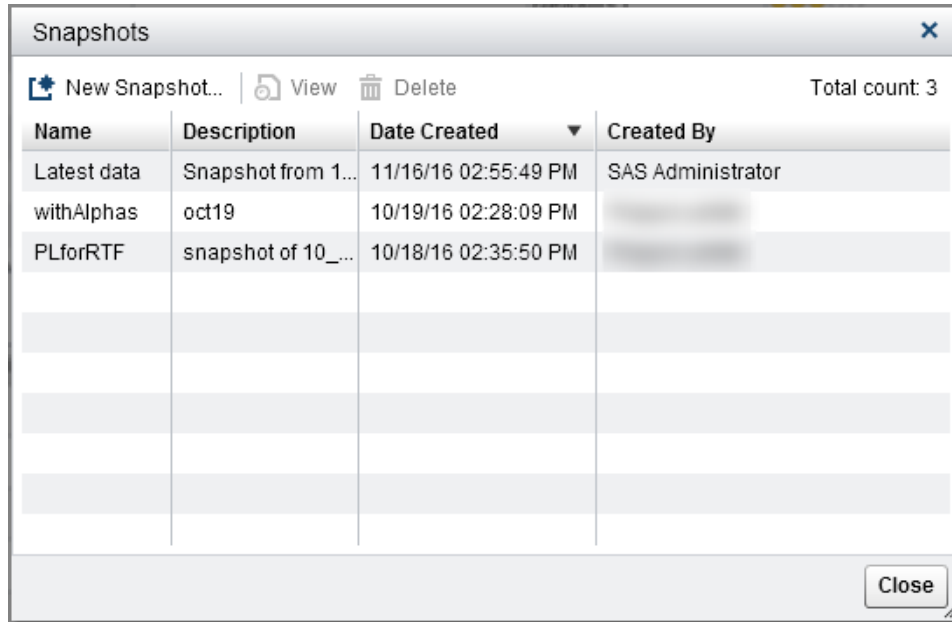
Figure 5.2 New Snapshot Window



5. Click **OK** in the New Snapshot window. Then click **Close** in the Snapshots window.

The new snapshot is created and displayed in the Snapshots window, as shown in the following display:

Figure 5.3 Snapshots Window



The screenshot shows a window titled "Snapshots" with a close button (X) in the top right corner. Below the title bar, there are three buttons: "New Snapshot..." (with a plus icon), "View" (with a magnifying glass icon), and "Delete" (with a trash can icon). To the right of these buttons, it says "Total count: 3". Below the buttons is a table with four columns: "Name", "Description", "Date Created", and "Created By". The table contains three rows of data. The first row shows "Latest data" as the name, "Snapshot from 1..." as the description, "11/16/16 02:55:49 PM" as the date created, and "SAS Administrator" as the creator. The second row shows "withAlphas" as the name, "oct19" as the description, "10/19/16 02:28:09 PM" as the date created, and a blurred name. The third row shows "PLforRTF" as the name, "snapshot of 10_..." as the description, "10/18/16 02:35:50 PM" as the date created, and a blurred name. Below the table, there is a "Close" button in the bottom right corner.

Name	Description	Date Created	Created By
Latest data	Snapshot from 1...	11/16/16 02:55:49 PM	SAS Administrator
withAlphas	oct19	10/19/16 02:28:09 PM	[Blurred]
PLforRTF	snapshot of 10_...	10/18/16 02:35:50 PM	[Blurred]

Viewing a Snapshot

Overview

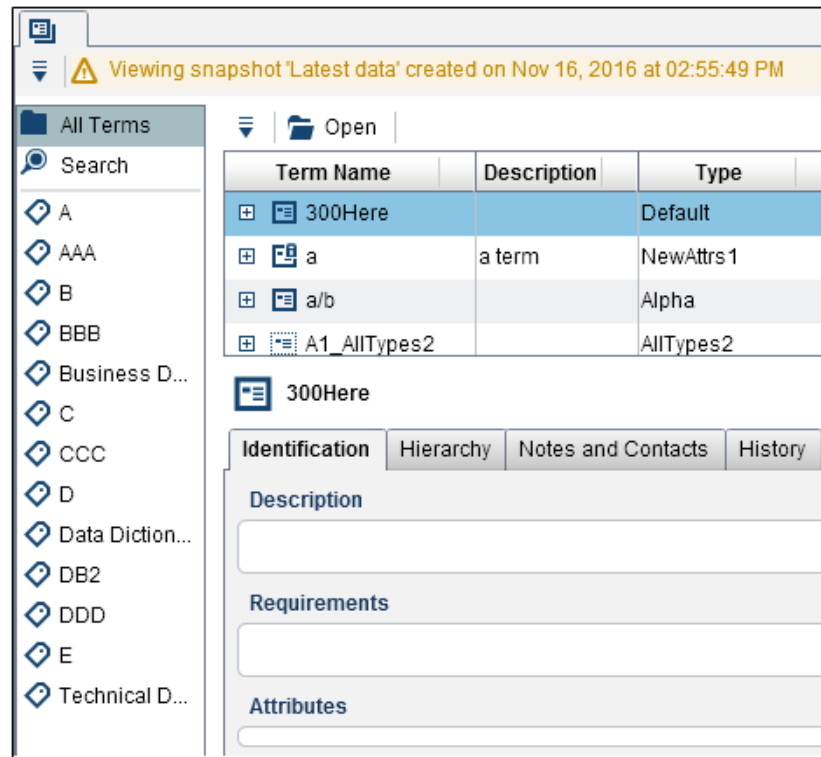
You can click **View** in the Snapshots window to access a read-only view of a selected snapshot in a new browser tab. Because each snapshot records the contents of a SAS Business Data Network instance when it is created, you cannot edit the contents of snapshots.

You can perform the following tasks in a snapshot:

- [Search for Terms on page 42](#)
- [Sort by Tags on page 43](#)
- [Review and Export Term Types on page 44](#)
- [Review and Export Terms on page 46](#)

The following display shows a snapshot:

Figure 5.4 Snapshot

























The snapshot label at the top of the snapshot lists the snapshot name and the time and date of its creation.

Search for Terms

You can click **Search** to access the **Search** pane in a snapshot. Enter text in the **Search** field and click **Search**. The search covers all text fields on the term. These fields contain information such as the name, description, requirements, importance, and status of the term and the values of text attributes.

The following display shows sample search results:

Figure 5.5 Search Results

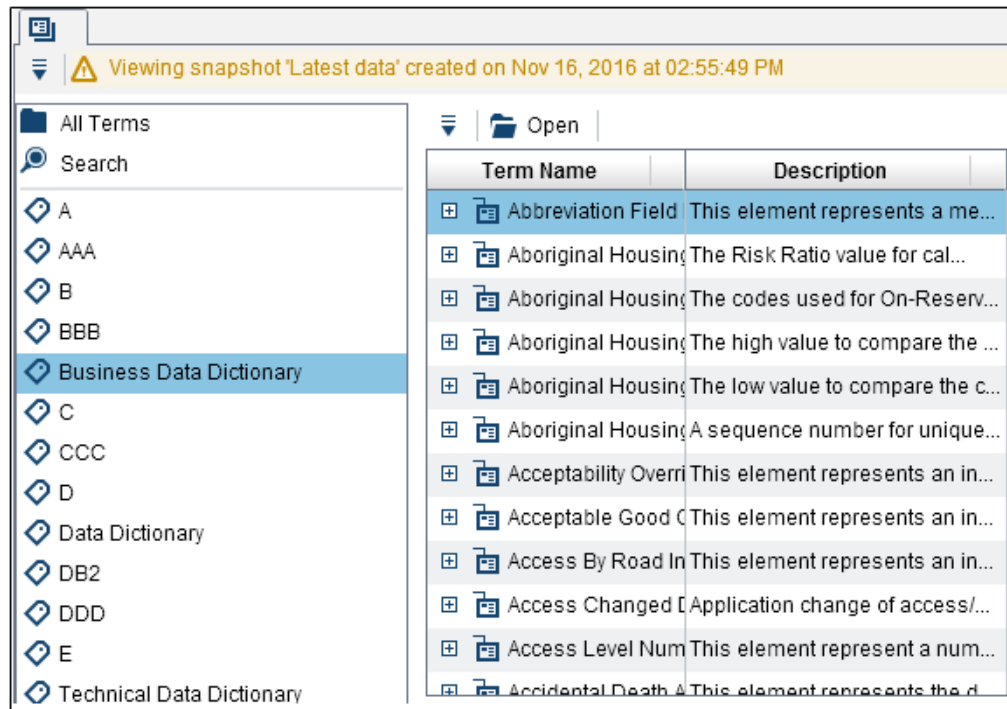
<div>  Search: <input type="text" value="job"/> </div> <div>  Open </div>			
Term Name	Description	Type	
  Batch Job Class N	This element represents the n...	Business Data Di...	
  Batch Job Identifica	This element is a unique identi...	Business Data Di...	
  Batch Job Identifier	This element represents an id...	Business Data Di...	
  Batch Job Jcl Acco	This element is the account na...	Business Data Di...	
  Batch Job Messag	This element represents in text...	Business Data Di...	
  Batch Job Montior	This element represents a syst...	Business Data Di...	
  Batch Job Name	This element represents the n...	Business Data Di...	
  Batch Job Notificat	This element is the mainframe...	Business Data Di...	
  Batch Job Restart	This element represents an in...	Business Data Di...	
  Batch Job Run Dat	This element represents the d...	Business Data Di...	

Filter by Tags

You can click on a tag in the list on the left side of the snapshot to filter the term list by the selected tag.

The following display shows the terms that contain the Business Data Dictionary tag:

Figure 5.6 Terms Filtered by a Tag

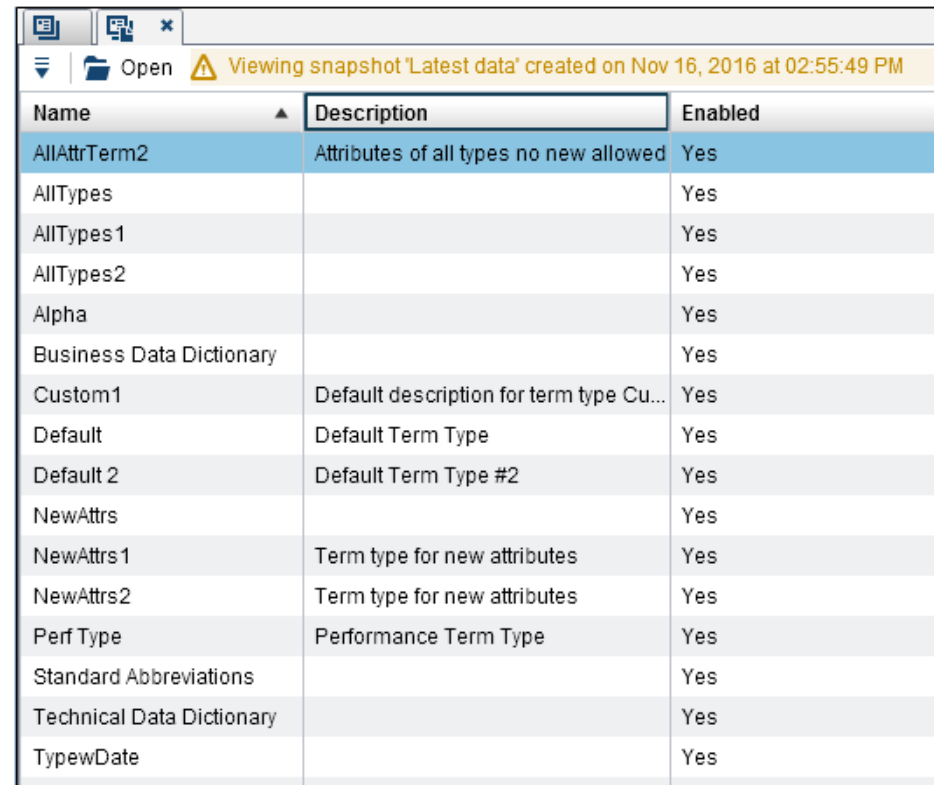


Review and Export Term Types

You can click **Manage Term Types** in the **Actions** menu to see the list of the term types that are contained in the snapshot.

This list is shown in the following display:

Figure 5.7 Term Types



Name	Description	Enabled
AllAttrTerm2	Attributes of all types no new allowed	Yes
AllTypes		Yes
AllTypes1		Yes
AllTypes2		Yes
Alpha		Yes
Business Data Dictionary		Yes
Custom1	Default description for term type Cu...	Yes
Default	Default Term Type	Yes
Default 2	Default Term Type #2	Yes
NewAttrs		Yes
NewAttrs1	Term type for new attributes	Yes
NewAttrs2	Term type for new attributes	Yes
Perf Type	Performance Term Type	Yes
Standard Abbreviations		Yes
Technical Data Dictionary		Yes
TypewDate		Yes

You cannot edit these term types, but you can export them to an XML document.

A portion of a sample XML document is shown in the following display:

Figure 5.8 Term Type Export

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Resources>
  <Resource label="AllAttrTerm2" createDate=
"2016-10-17T10:22:39.172-04:00" identity="AllAttrTerm2" type=
"BDNTERMTYPE">
    <Attributes>
      <attribute name="Description" value="Attributes of all
types no new allowed"/>
      <attribute name="CreatedByUser" value=" " />
      <attribute name="ModifiedByUser" value=" " />
      <attribute name="AllowCustomAttributes" value="N"/>
      <attribute name="Enabled" value="N"/>
    </Attributes>
    <Dependencies>
      <dependency type="I">
```

This export document is stored in a designated place and available to be imported when needed.

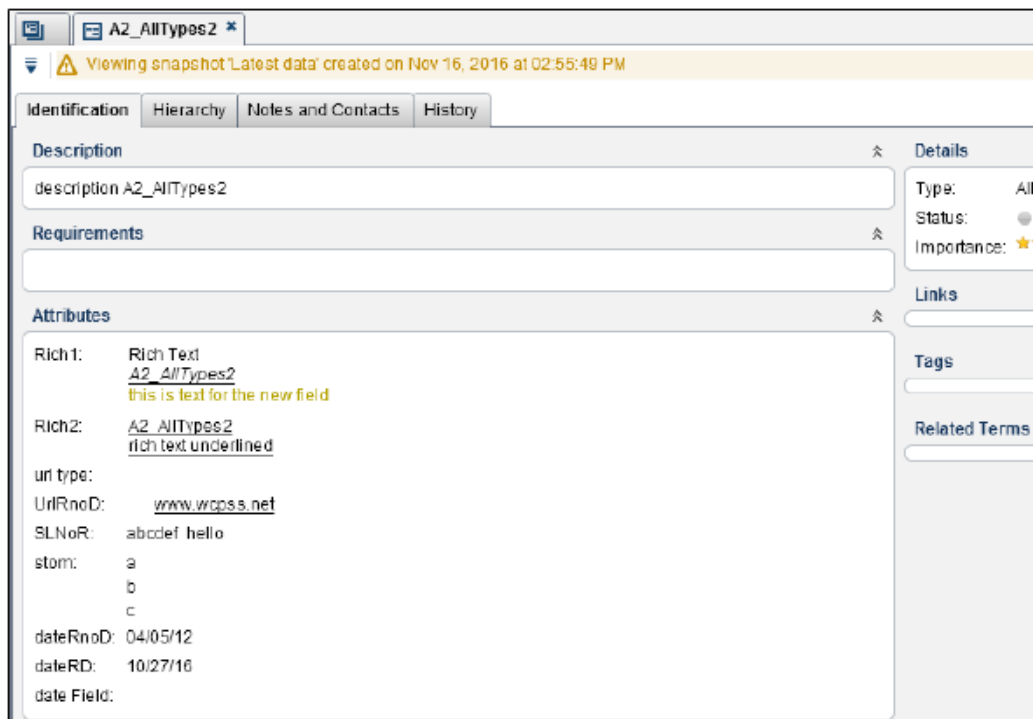
Review and Export Terms

You can click items under the **Actions** button above the terms list to export terms to an XML file or a definition. These documents are stored in a designated place and available to be imported when needed.

You can also select a term in the terms list and click **Open** in either the menu bar or the **Actions** button to review it in detail.

The following display shows a detailed view of the A2_AllTypes2 term:

Figure 5.9 Term Details



You can click the **Identification**, **Hierarchy**, **Notes and Contacts**, and **History** tabs to review the information that they contain. However, you cannot edit the contents of these tabs while you are viewing the snapshot.

You can use the **Save As PDF Report** item under the **Actions** button in a detailed term view to save information about the selected term in a PDF document.

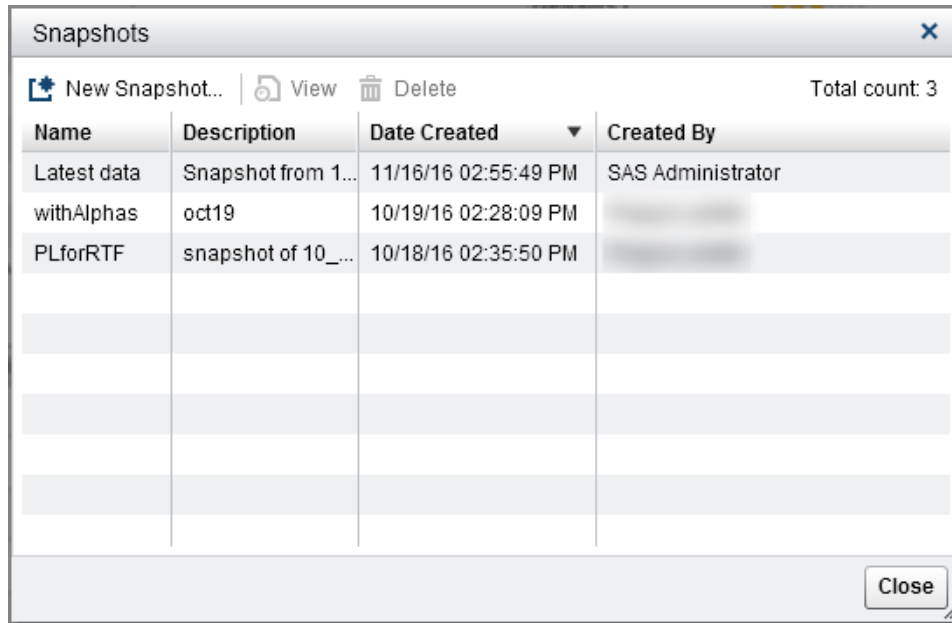
Maintaining Snapshots

If you are an administrator in SAS Business Data Network, you can click **Manage Snapshots** in the **Action** menu to access the Snapshots window. You can perform the following maintenance functions in the Snapshots window.

- Click **New Snapshot** to create a new snapshot.
- Click **View** to view an existing snapshot.
- Click **Delete** to delete an existing snapshot from SAS Business Data Network.

The Snapshots window is shown in the following display:

Figure 5.10 Snapshots Window



Chapter 6

Importing and Exporting Terms

Importing and Exporting Terms	49
Importing and Exporting Terms in XML	50
Overview	50
Importing Terms from an XML File	51
Exporting Terms to an XML File	52
Export Terms to an Entity Definition	54
Importing Terms from CSV Files	55
Overview	55
Importing Terms from CSV Files	55
Rules for Importing CSV Files	56
Example	64
Command-Line Processing for Imported Terms	66
Overview	66
Usage Information	66
Example	67

Importing and Exporting Terms

You can import lists of terms stored in either XML or CSV format into SAS Business Data Network. This feature enables you to add any number of terms to SAS Business Data Network without having to add them individually. Instead, you can include them in a file and then import the file.

You can also export selected terms from SAS Business Data Network into files that use an XML format. The exported terms can be imported into other SAS Business Data Network installations.

The entity definition export feature in SAS Business Data Network enables you to define one or more business terms with the correct attributes. Then you can export that set of terms into an Entity Definition file that can be imported in Master Data Foundation projects or SAS MDM.

SAS Business Data Network contains a command-line application to import relationships into the Relationship service. This tool enables you to disable importing relationships when you run XML and CSV import operations and run the import relationships later. This approach improves the performance of the import process.

See:

- [“Importing and Exporting Terms in XML” on page 50](#)
- [“Command-Line Processing for Imported Terms” on page 66](#)

Importing and Exporting Terms in XML

Overview

SAS Business Data Network supports the following XML-based import and export operations:

- [“Importing Terms from an XML File” on page 51](#)
- [“Exporting Terms to an XML File” on page 52](#)
- [“Export Terms to an Entity Definition” on page 54](#)

The XML-based import files and the export files share an identical XML-based format and must support UTF-8. The terms contained in the files cannot exceed 100 characters in length. Issues can occur when the terms that you import contain characters outside of the character set that has been configured for your database.

You can export a short list of terms from SAS Business Data Network and review the file to examine the XML structure. Then you can use the file that you created in the export as a template for importing additional terms. You can review a sample XML file in [“Exporting Terms to an XML File” on page 52](#).

The .xsd schema for SAS Business Data Network term imports and a sample term XML import file are available in the share directory in the DataFlux Web Studio installation. The .xsd schema is named relationshipobjects.xsd, and the sample term import file is named bdntermimport_sample.xml. Instructions for verifying your XML with the schema are available at many Internet websites.

The available resource types for the XML files used for importing and exporting terms in SAS Business Data Network are listed in the following table:

Resource Type	Description
BDNTERM	The term listed in SAS Business Data Network. Each term is required to have a unique identifier in the Identity attribute. Terms cannot be longer than 99 characters and are case insensitive.
BDNTERMREF	A reference to a SAS Business Data Network term. The term can exist in the SAS Business Data Network database, or somewhere within the import XML document. The BDNTERMREF Resource must be contained within a dependency element. Any term references occurring outside of a dependency element are ignored.
BDNTAG	Tags associated with the term (displayed in the Tags field in the Identification tab).

Resource Type	Description
BDNNOTE	Notes associated with the term (displayed in the Notes section of the Notes and Contacts tab).
BDNCONTACT	Contacts associated with the term (displayed in the Contacts section of the Notes and Contacts tab).
BDNATTRIB	Attributes associated with the term (displayed in the Attributes field in the Identification tab).
BDNACCOUNT	A reference to an account that is connected to a contact. This reference type is ignored if not related to a BDNCONTACT.
BDNROLE	A reference to a role that is connected to a contact. This reference type is ignored if not related to a BDNCONTACT.
URI	A URI for a link associated with the term (displayed in the Links field on the Identification tab).

Importing Terms from an XML File

1. Display the main window for SAS Business Data Network, if you have not done so already.
2. In the **Action** menu beside the **New Term** icon, select **Import Terms**.
3. Select or clear the **Publish import results to relationships service?** check box in the Import Terms window.

The check box and its explanatory message are shown in the following figure:

Figure 6.1 Publish to Relationships Service

The last step of the import is publishing the results to the relationships service. If the import results in a large number of terms being created or updated, the publishing step may be very slow and you may want to skip the publishing step. Terms and tags can be published to the relationship service later by running the sas-bdn-relationships-loader tool. Skipping the publishing will affect SAS/Lineage® until the sas-bdn-relationships-loader tool is run to publish terms and tags to the relationship service.

☒ Publish import results to relationships service?

Clearing this check box prevents the import operation from publishing import results to the Relationship service. This approach improves performance when you import a large XML file. If relationships are not updated, the terms and tags in the imported file might not be added to SAS Lineage. Also, future updates to the terms or their attributes will not be reflected in the relationship service. However, the Relationships

service can be updated later by running the batch command line program described in [“Command-Line Processing for Imported Terms” on page 66](#).

4. Navigate to the folder that contains the XML file to be imported.
5. Select the XML file. The file that you select must have an .xml extension and a name that is encoded in UTF-8.
6. Click **Open**. The terms in the file will be imported into the current SAS Business Data Network.

Note that when a term is imported that already exists in SAS Business Data Network with the same name and same ancestry, the existing term's history is maintained. This behavior enables you to roll back to the pre-imported version of the term. The imported term completely replaces the old term in every other regard. Therefore, the imported term must be a complete definition of the term with all the attributes and dependencies (such as related terms, associated items, notes, and tags) defined as they are expected to appear in SAS Business Data Network.

The original term's children are still maintained. Disassociate a child term with a parent term through import by importing the child term with a different "P" type dependency or no "P" type dependency at all.

Exporting Terms to an XML File

1. Display the main window for SAS Business Data Network, if you have not done so already
2. Select one or more terms in the panel on the right. You must select terms, or no terms will be exported.
3. In the **Action** menu beside the **New Term** icon on the left, select **Export Terms**.
4. Select **XML File** in the submenu.
5. Click **Save** in the Export Terms window, and select a location to save the file. Specify an appropriate name for the file.
6. Click **Save** to write the file to the selected location.

The exported file has the structure that is described in the [“Overview” on page 50](#) of this topic. The following display shows the beginning of a sample XML file.

This segment defines the first term, which is *Warehouse*:

Figure 6.2 XML File for Warehouse

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Resources>
  <Resource label="Warehouse" identity="Warehouse" type="BDNTERM">
    <Attributes>
      <attribute name="Description" value="Storage facility for
goods and raw materials"/>
      <attribute name="Requirements" value="Must meet size and
security standards"/>
      <attribute name="Status" value="Not Specified"/>
      <attribute name="Importance" value="Medium"/>
    </Attributes>
    <Dependencies>
      <dependency type="A">
        <Resource identity="Logistics" type="BDNTAG"/>
      </dependency>
    </Dependencies>
  </Resource>
```

The term *Warehouse* has a type of BDNTERM, with label and identity attributes set to the text "Warehouse." The identity attribute is required, but an empty label attribute can be filled with contents of the identity. This particular term contains attributes and values for *Description*, *Requirements*, *Status*, and *Importance* that populate fields on the **Identification** tab when the term is selected in SAS Business Data Network. The term contains a type A dependency, which can be used for related terms, tags, and links. In this case, the dependency connects the term to the **Logistics** tag, which has a resource type of BDNTAG.

The following display contains the next term that contained in the XML file:

Figure 6.3 Term with Type A Dependency

```
<Resource label="Loading Dock" identity="Warehouse\Loading
Dock" type="BDNTERM">
  <Attributes>
    <attribute name="Description" value="Facility for
incoming and outgoing goods"/>
    <attribute name="Requirements" value=""/>
    <attribute name="Status" value="Not Specified"/>
    <attribute name="Importance" value="Medium"/>
  </Attributes>
  <Dependencies>
    <dependency type="D">
      <Resource label="Warehouse" identity="Warehouse"
type="BDNTERMREF"/>
    </dependency>
  </Dependencies>
</Resource>
```

Like *Warehouse*, *Loading Dock* and *Mailroom* are defined using the BDNTERM type, but the treatment of the identity attributes is different. In this example, the *Loading Dock* term is defined in relationship to the term *Warehouse*, in the form of the following code:

```
identity="Warehouse\Loading Dock"
```

The relationship between the parent *Warehouse* and the child *Loading Dock* is reinforced by the use of a type D dependency between the two. The label and identity for the dependency are "Warehouse", and the resource type is "BDNTERMREF." When you export a term, you must also select the related terms, or those relationships will be lost. Direct descendants of a term are exported with the term.

The final section of the code contains yet another use of a dependency.

The term *Section* is defined in the code shown in the following display:

Figure 6.4 Another Type of Dependency

```
<Resource label="Section" identity="Warehouse\Section"
type="BDNTERM">
  <Attributes>
    <attribute name="Description" value="Section of the
warehouse designated for a specific product or type
of product"/>
    <attribute name="Requirements" value="Must be secure
and accessible"/>
    <attribute name="Status" value="Not Specified"/>
    <attribute name="Importance" value="Medium"/>
  </Attributes>
  <Dependencies>
    <dependency type="D">
      <Resource label="Warehouse" identity="Warehouse"
type="BDNTERMREF"/>
    </dependency>
    <dependency type="A">
      <Resource label="Picking" identity="Picking"
type="BDNTERMREF"/>
      <Resource identity="Logistics" type="BDNTAG"/>
    </dependency>
  </Dependencies>
</Resource>
</Resources>
```

The parent and child relationship between *Warehouse* and *Section* is defined in the same way as the relationship between *Warehouse* and *Loading Dock*. It uses the identity attribute in the resource and the type D dependency. The *Section* term uses a type A dependency, just as *Warehouse* did, to connect the term to the **Logistics** tag (resource type BDNTAG). However, this time, the dependency also establishes a connection to *Picking*, which is a related term with a resource type of BDNTERMREF.

Export Terms to an Entity Definition

You can use the entity definition export feature to define one or more business terms with the correct attributes. Then, you can export that set of terms into an Entity Definition file that can be imported in Master Data Foundation projects or SAS MDM. The same method can also be used to perform the following tasks:

- Select a set of terms to create
- Create SAS MDM metadata that enables the user to convert terms into attribute groups on existing entity definitions

Perform the following steps:

1. Display the main window for Business Data Network, if you have not done so already.
2. Select one or more terms in the panel on the right. You must select terms, or no terms will be exported.
3. In the **Action** menu beside the **New Term** icon on the right, select **Export Terms**.
4. Select **Definition** in the submenu. An Export Terms window is displayed.
5. Click **Save** and select a location to save the file. Specify an appropriate name for the file.
6. Click **Save** to write the file to the selected location.

Importing Terms from CSV Files

Overview

SAS Business Data Network supports importing lists of terms stored in comma-separated-value format (CSV) files. You should create these term lists in Microsoft Excel and export them to CSV files. You should avoid entering terms directly into a CSV format using a text editor. Plain text editors do not support putting a newline character in the cell for attributes like description, requirements, or multi-line and rich texts.

- [“Importing Terms from CSV Files” on page 55](#)
- [“Rules for Importing CSV Files” on page 56](#)
- [“Example” on page 64](#)

Importing Terms from CSV Files

1. Display the main window for SAS Business Data Network, if you have not done so already.
2. In the **Action** menu beside the **New Term** icon, select **Import Terms**.
3. Select or clear the **Publish import results to relationships service?** check box in the Import Terms window.

The check box and its explanatory message are shown in the following figure:

Figure 6.5 Publish to Relationships Service

The last step of the import is publishing the results to the relationships service. If the import results in a large number of terms being created or updated, the publishing step may be very slow and you may want to skip the publishing step. Terms and tags can be published to the relationship service later by running the sas-bdn-relationships-loader tool. Skipping the publishing will affect SAS/Lineage® until the sas-bdn-relationships-loader tool is run to publish terms and tags to the relationship service.

☒ Publish import results to relationships service?

Clearing this check box prevents the import operation from publishing import results to the Relationship service. This approach improves performance when you import a large CSV file. If relationships are not updated, the terms and tags in the imported file might not be added to SAS Lineage. Also, future updates to the terms or their attributes are not reflected in the Relationship service. However, the Relationship service can be updated later by running the batch command line program described in [“Command-Line Processing for Imported Terms” on page 66](#).

4. Navigate to the folder that contains the CSV file to be imported.
5. Select the CSV file. The file that you select must have an .csv extension and a name that is encoded in UTF-8.
6. Click **Open**. The terms in the file are imported into the current SAS Business Data Network.

Rules for Importing CSV Files

Overview

Specific rules have been developed for the SAS Business Data Network tool for importing CSV files. Therefore, you must inspect your CSV files before you import them using the tool. Otherwise, you might not get the results that you expect. The import operation might fail, or data might be imported into the wrong places in the SAS Business Data interface.

These rules can be divided into the following types:

- [“General CSV Formatting Rules” on page 56](#)
- [“Column Rules” on page 57](#)
- [“Attribute Rules” on page 60](#)

General CSV Formatting Rules

General CSV formatting rules apply to CSV import in SAS Business Data Network. For example, values with multiple embedded commas must be enclosed in double quotation marks. Multiline values must also be double quoted. Applications such as Excel enforce some of these rules when they export data to CSV files.

Examine your CSV files for compliance with the following formatting rules:

Values with multiple embedded commas
must be enclosed in double quotation marks.

Multiline values
must be enclosed in double quotation marks. Note that the multi-line fields in Excel files are not supported by the SAS Business Data Network CSV import tool.

Types and paths
When type of a term is not specified, the *Default* term type is used.

Paths can use only a backslash as a separator. Using a forward slash or any other character as a separator is invalid. For example, *State Health Plan\Benefit Focus* is a valid path. *State Health Plan/Benefit Focus* and *State Health Plan*Benefit Focus* are invalid paths. If the path is not found, an error is displayed to the user and the term is not imported.

The path to a term can end at either the parent term or the term name. The path for top-level terms can be empty. For example, the following types and paths are valid:

The following table illustrates valid type and paths in a CSV file:

Table 6.1 *Types and Paths*

Name	Type	Path
State Health Plan	Empty Cell	(No path specified for this top-level term)
Benefit Focus	Empty Cell	State Health Plan (Path extends to parent term)
United Health	Empty Cell	State Health Plan\United Health (Path extends to term)

The empty cells in the Type column fall back to the default value.

Case sensitivity

User-defined attribute names are case sensitive. However, system column names are not case sensitive.

In the following header row, the names *Name*, *Type*, and *Path* in the first three columns are system columns unaffected by case.

Table 6.2 *Case Sensitivity Rules*

Name	Type	Path	Name	Division	Rating	division	raTing
------	------	------	------	----------	--------	----------	--------

However, the columns named *Rating* and *raTing* and *Division* and *division* are user-defined attributes that are case sensitive. Therefore, these columns are treated as four separate user-defined attributes. The difference in case between them marks them as individual entities.

Names

Names cannot contain a backslash, but forward slashes are permitted. For example, *BCBC/Financial* is valid, but *BCBS\Financial* is invalid.

Column Rules

Examine your CSV files for compliance with the following column rules:

System attributes and system columns

Columns with the following names are eligible to be designated as the system attributes: Name, Type, Path, Description, Requirements, Status, Importance, CreatedByUser, ModifiedByUser, Version, and VersionId. The first occurrence of any of these column names in the header is designated as the system column. Subsequent occurrences of the same column name are treated as user-defined attributes.

The column named *Name* in the first column is the system column. The column named *Name* in the fourth column is a user-defined attribute. The columns named *Type* and *Path* are the only instances of these columns and are treated as system columns.

Table 6.3 System Columns and User-defined Attributes

Name	Type	Path	Name
Data object	Empty Cell	Empty Cell	Data object2

The *Name* system column (Data object) is displayed in the Terms list in SAS Business Data Network when the CSV file is imported. The *Name* user-defined attribute (Data object2) is displayed in the **Attributes** field in the **Identification** tab.

When there are multiple instances (columns) of a user-defined attribute, the final occurrence is treated as a user-defined attribute.

Table 6.4 Multiple User-defined Attributes

Name	Type	Path	Name	Name	Name
Data object	Empty Cell	Empty Cell	Data object2	Data object3	Data object4

The first *Name* column (Data object) is treated as the system column. The final *Name* column (Data object4) is treated as a user-defined attribute. The other *Name* columns (Data object2 and Data object3) are ignored when the CSV file is imported.

Number of columns

The number of columns in a data record must be equal the number of columns in the header. When a data record has more columns than the number of columns in the header, all of the values in the extra columns are ignored.

The header row for the following table contains *Name*, *Type*, *Path*, and *Description* columns:

Table 6.5 Data Record with an Extra Column

Name	Type	Path	Description
State Health Plan	Empty Cell	Empty Cell	Empty Cell

However, suppose that the data record contains one or more extra columns. This file can be displayed as follows in a text editor:

```
Name, Type, Path, Description
State Health Plan,,, State Health Plan
```

The first line of the file defines the four columns in the file header: Name, Type, Path, and Description. The second line of the file forms the first data record of the file. The three commas in this data record represent three empty columns that fill the Type, Path, and Description columns in the first data record row in the table. Therefore, the text that should fill the Description column in the table (State Health Plan) is ignored.

Extra columns that are not included in the header row are simply ignored. However, if the data columns have fewer fields than the header row, then the file is invalid. If a row in the file shown in the table above had only three columns, it would be invalid because the header row contains four columns.

Column header

must be contained in the first line of the CSV file.

Mandatory columns

All CSV files must contain Name, Type, and Path columns. These mandatory columns must be defined in the header and can be listed in any order.

Both of the following tables are valid:

Table 6.6 *Column Order A*

Name	Tags	Path	Type
State Health Plan	A,b	Empty Cell	Empty Cell

Table 6.7 *Column Order B*

Tags	Name	Type	Path
A,b	State Health Plan	Empty Cell	Empty Cell

Base columns and system attribute columns

Base columns must be present in the CSV file. System attribute columns are optional. The CSV file can be imported with or without these columns.

Table 6.8 *Base Column Summary*

Column	Are Blanks Allowed?	Valid Values	Example	Value When Blank
Name	No	Empty Cell	Empty Cell	Error
Type	Yes	An exact match to a SAS Business Data Network term type	Empty Cell	Default
Path	Yes	Empty Cell	Term1 Term1\Term2\Term3	Term becomes root term

Table 6.9 System Attribute Column Summary

Column	Data Type	Are Multiples Allowed?	Value When Blank	Value Not Matched in CSV
Requirements	Multi-line text allowed with line return	No	None	Not applicable
Importance	Should be one of those set on the term type (case insensitive)	No	Picks up default from term type	Empty Cell
Status	Should be one of those set on the term type (case insensitive)	No	Picks up default from term type	Empty Cell
Tags	Empty Cell	Yes	None	New tag created

Attribute Rules

Examine your CSV files for compliance with the following attribute rules:

Custom user-defined attributes

You can define user-defined attribute types for the term types in SAS Business Data Network. (See [“Review or Edit a Term Type” on page 71](#) for more information.) When you import these user-defined attributes in a CSV file, the column name in the CSV file must match the attribute name defined in the SAS Business Data Network term type. If a default value is defined in the term type, then the user-defined attributes for the term are set to the default value from the term type. If validation fails, then the value is blank.

The following table lists the user-defined attribute types that are available for SAS Business Data Network term types and describes their characteristics:

Table 6.10 User-defined Attribute Types

Attribute Type	Column Name	Column Value	Validation	Invalid
Single Line Text	Defined in term type	Single line of text	None	Not applicable
Multi-Line Text	Defined in term type	Multiple lines of text (ALT +ENTER in Excel)	None	Not applicable
Single Select	Defined in term type	One of the values defined in term type must match case	Set if a matching value found in list	Not Selected

Attribute Type	Column Name	Column Value	Validation	Invalid
Multi-Select	Defined in term type	One or more of the values defined in term type. Separated by commas. Case-sensitive.	Set if a matching value found in list	Not Selected
Boolean	Defined in term type	Yes, No, Y, N, True, False	Default	Default
Date	Defined in term type	Accepted format is YYYY-MM-DD. Other formats produce unexpected results.	Default taken, if specified	Blank
URL	Defined in term type	Valid URL format	Empty Cell	No validation done during CSV import
Rich Text	Defined in term type	<html><BODY><P align="left"><U>AT2 a BOLD and Underline</U></P>	Empty Cell	No validation performed

If the term type supports new user-defined attributes, then any attribute that is not defined for that term's term type is imported as a user-defined attribute.

The user-defined attributes that you add use the following format:

Value | Instructions | Required

The column name is the Attribute name.

Complex attributes

The following items have been designated as complex attributes: Tags, Links, Related Terms, Associated Items, Notes, and Contacts. You can also think of them as system attributes that correspond to elements present in SAS Business Data Network.

The data for a term can include one or more complex attributes. If multiple complex attributes are present, each attribute must be contained in a single cell of the data record and be separated by commas. Each of these attributes is defined by various properties. Those properties must be separated by a pipe symbol (|). For example, links use the following format:

label | URI

Here is an example of a link in this format:

cnn | [Http://www.cnn.com](http://www.cnn.com)

When you include multiple links, separate them with commas. Then surround them in quotation marks in the CSV file to indicate that they are part of a single column, as follows:

```
"cnn| Http://www.cnn.com, newweek | Http://newweek.com"
```

Additional descriptions and examples of these complex attributes are provided in remaining CSV import rules.

Tags

All tags must be defined in a single column. The individual tags must be separated by commas. Tag has only one property, which is Name.

The following table shows tags added to a term:

Table 6.11 Tags

Name	Type	Path	Tags
State Health Plan	Empty Cell	Empty Cell	Health Care Providers, Pharmacy Providers

Links

All links must be defined in a single column. The individual links must be separated by commas. The link properties are Label and URI. They must be separated by the pipe symbol (|).

The following table shows links added to a term:

Table 6.12 Links

Name	Type	Path	Links
State Health Plan	Empty Cell	Empty Cell	Cnn headlines http://www.cnn.com, msn www.msn.com

Related Terms

All related terms must be defined in a single column. The individual related terms must be separated by commas. The related term properties are Path and Label. They must be separated by the pipe symbol (|). The Path must be a valid path to the term. Label is not required.

The following table shows related terms added to terms:

Table 6.13 Related Terms

Name	Type	Path	Related Terms
State Health Plan	Empty Cell	Empty Cell	CEDS ceds,_ANew/B3 newB3invalid
Benefit Focus	Empty Cell	Empty Cell	CEDS ceds,_ANew/B3

The first file depicted in the table contains two related terms. Both of them have labels. The second file in the table also contains two related terms, but only the first one contains a label.

Associated Items

All associated items must be defined in a single column. The individual associated items must be separated by commas. The required associated items properties are Name, ID, and Type. Description, Notes, and Path are optional properties. The properties must be separated by the pipe symbol (|). The order of the properties that you define is important.

The associated items properties must be entered in the exact order that is shown in the last paragraph. Therefore, all associated items must begin with the three required properties, which are Name | ID | Type. If you need to use optional properties, add them to the end of the required list and provide a blank space for any property that you omit. For example, an associated item that includes the optional notes and path properties but not the description property would be structured as follows: Name | ID | Type | | Notes | Path.

The following table shows associated items added to a term:

Table 6.14 Associated Items

Name	Type	Path	Associated Items
State Health Plan	Empty Cell	Empty Cell	"Abort A59KZUAD.B7000001/Action Action Description Notes, notes"

The associated item in the file depicted in the table is enclosed in double quotation marks because the Notes portion of the associated item contains a comma.

Notes

All notes must be defined in a single column. Individual notes must be separated by commas. The note properties are Content and CreatedByUser. They must be separated by the pipe symbol (|). If the user is omitted, or not in the system, then the name of the user who is performing the import job is used.

The following table shows notes added to a term:

Table 6.15 Notes

Name	Type	Path	Notes
State Health Plan	Empty Cell	Empty Cell	Somenotes someuser

Contacts

All contacts must be defined in a single column. Individual contacts must be separated by commas. The contact properties are User and Role. They must be separated by the pipe symbol (|). Text matching is done in the role. The role is case sensitive and must match the set values. Otherwise, the contact will not be created. The contact does not have to exist in the system.

The following table shows contacts added to a term:

Table 6.16 *Contacts*

Name	Type	Path	Contacts
State Health Plan	Empty Cell	Empty Cell	login Business Owner, login2 Network Admin

Example

This example shows an Excel file that has been exported to a CSV file and then processed for importing into SAS Business Data Network. Then it shows where the data in the file has been added in the SAS Business Data Network interface.






The following display shows a portion of the exported CSV file:

Figure 6.6 *CSV File Exported from Excel*

Name	path	Type	Description	Requirements
CSVBasic1	CSVBasic1			requirements
CSVBasic2	CSVBasic1	Default		
CSVBasic3	CSVBasic1\CSVBasic2\CSVBasic3		Description, w	
CSVBasic4	CSVBasic1\CSVBasic2\CSVBasic3		Description	requirements
CSVBasic5				
CSVBasic6	CSVBasic6			

When CSV terms are imported into SAS Business Data Network successfully, you can see them in the Terms list, as shown in the following display:

Figure 6.7 *Imported CSV Terms*

<div> <div>▼</div> <div>New Term...</div> <div>Open</div> <div></div> <div>Tags...</div> <div>Lineage</div> </div>					
Term Name	Description	Type	Importa...	Status	
 A		Default	★★★★☆	Not Spec...	
 AAT		Default	★★★★☆	Not Spec...	
 CSVBasic1	description(Attr2) this is a ...	Default	★★★☆☆	Editing	
 CSVBasic5		Default	★★★★☆	Not Spec...	
 CSVBasic6		Default	★★★★☆	Under R...	

You can see how the terms flow into SAS Business Data Network if you compare the formatted columns in the CSV file to the imported file in SAS Business Data Network.

For example, the formatting in the first row in the links column of the CSV file is shown in the following display:

Figure 6.8 Links Column in the CSV File

links
Cnn headlines http://www.cnn.com, msn www.msn.com

The label and URL for each link are separated by a | (pipe) symbol. The two links also are separated by a comma. Both of these formatting choices are specified in the “Importing Terms from CSV Files” on page 55 and are needed to ensure that the links are properly displayed in the SAS Business Data Network.

The following display shows how the links are shown in the **Identification** tab:

Figure 6.9 Links Displayed in SAS Business Data Network

Links	
 Cnn headlines	<u>Lineage</u>
 msn	<u>Lineage</u>

Associated items follow the same pattern.

The formatting in associated items column of the CSV file is shown in the following display:

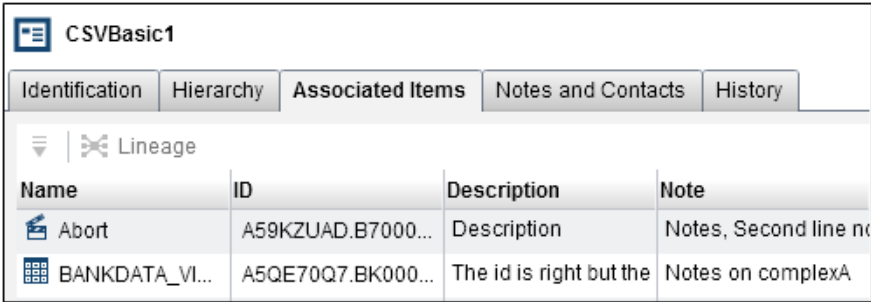
Figure 6.10 Associated Items Column in the CSV File

Associated Items
"Abort A59KZUAD.B7000001/Action Action Description Notes, Second line notes", BANKDATA_VIEW A5QE70Q7.BK0000 WE/PhysicalTable Table The id is right but the label and type are incorrect Notes on complexA



The associated item in the first row is enclosed in double quotation marks because the Notes portion of the associated item contains a comma. The individual associated items are separated by commas, and the properties are separated by | (pipe) symbols.

The following display shows the **Associated Items** tab in SAS Business Data Network:

Figure 6.11 Associated Items Displayed in SAS Business Data Network



The screenshot shows a web application window titled 'CSVBasic1'. It has five tabs: 'Identification', 'Hierarchy', 'Associated Items' (which is selected), 'Notes and Contacts', and 'History'. Below the tabs, there is a 'Lineage' section with a dropdown arrow and a 'Lineage' icon. The main content area is a table with four columns: 'Name', 'ID', 'Description', and 'Note'. There are two rows of data:

Name	ID	Description	Note
 Abort	A59KZUAD.B7000...	Description	Notes, Second line no
 BANKDATA_VI...	A5QE70Q7.BK000...	The id is right but the	Notes on complexA

Command-Line Processing for Imported Terms

Overview

The installation of SAS Business Data Network includes a command-line application that you can use to rebuild lineage after an import. You should do this if you import XML or CSV terms without importing the relationships for the terms at the same time. Disabling relationship importing improves the performance of importing terms. The tool name for Windows is UpdateRelationships.exe. For UNIX, the tool name is UpdateRelationships.

The command-line application executables are installed in the following location:
`SASHome\SASBusinessDataNetworkMidtier\3.2\tools`.

See:

- [“Usage Information” on page 66](#)
- [“Example” on page 67](#)

Usage Information

The following table lists the options available for the command-line application:

Table 6.17 Options

Command	Name	Function	Required
-b	SAS Business Data Network URL	Specifies the URL to SAS Business Data Network.	Yes
-h	Help	Displays help for this application.	No
-l	Publish level	Specifies the publish level. Available arguments are tagsOnly/termsOnly/both. Default=both.	No

Command	Name	Function	Required
-nc	No clean	Specifies that SAS Business Data Network resources should <i>not</i> be deleted from the Relationship service before publishing. Default=false. Therefore, SAS Business Data Network resources are deleted from the Relationship service unless this option is set to true.	No
-o	Output level	Specifies the output level when publishing to the relationship service. Available arguments are TRACE DEBUG INFO WARN ERROR FATAL OFF. Default=WARN.	No
-p	Password	Specifies the password for connecting to SAS Business Data Network.	Yes
-t	Import file type	Specifies the type of file referred to by the file path option. Applies only if file path option is specified. The valid values are CSV and XML. Default=XML.	No
-u	User	Specifies the user name for connecting to SAS Business Data Network.	Yes

Example

In this example, the publish level option (-l) is set to

```
termsOnly
```

. This means that the tags associated with those terms are not published. The following text is entered in the command line application:

```
C:\Program Files\SASHome\SASBusinessDataNetworkMidtier\3.2\tools\UpdateRelationships
-b http://<BDN.company.com>/SASBusinessDataNetwork>
-u <yourUserID>
-p <yourPassword>
-l termsOnly
```

If the publication is successful, the following message is displayed: **Publish succeeded**. Otherwise, an error message that indicates the issue encountered is displayed.

Chapter 7

SAS Business Data Network Administration

Managing Term Types	69
Overview	69
Create a New Term Type	70
Review or Edit a Term Type	71
Import or Export Term Types	71
Managing Deleted Terms	71
Managing Root Level Authorizations	71
Overview	71
Default Groups, Roles, and Capabilities	72
Define Users and Link Them to Groups (and Roles)	74

Managing Term Types

Overview

You can use the Term Type Manager window to perform the following tasks:

- [“Create a New Term Type” on page 70](#)
- [“Review or Edit a Term Type” on page 71](#)
- [“Import or Export Term Types” on page 71](#)

The Term Type Manager window contains all of the term types that have been defined for deletion in Business Data Network.

You can use the toolbar or the **Action** button to perform the following functions:

- Open the New Term Type window to define a new term type
- Open a selected term type for review or edit
- Duplicate a selected term type and open it for review or edit
- Disable a selected term type
- Delete a selected term type
- Import an existing term type in an XML file
- Export a selected term type in an XML file

Create a New Term Type

Click **New Term Type** to display the **Settings** sub-tab in the **New Term Type** tab. The sub-tab is divided into the following sections:

- Type Identification
- Workflows (optional)
- Specify status values
- Specify importance labels
- Business Roles

The **Type Identification** fields enable you to name and describe a new term type. For example, you can type *Simple term create* and describe it as follows: create term in *simple collaborative flow*.

The **Workflows (optional)** fields enable you to associate workflows for creating, editing, and deleting terms with a term type. Of course, if a term type is used with non-workflow terms that do not go through a collaborative review and approval process, it will not be associated with a workflow. The workflows are sorted into create, edit, and delete types. Each of these types includes the following workflows: None, Extended Create Term, Create Term, Delete Term, Edit Term, and Extended Edit Term. You can choose from these workflows to create term types that support very specific portions of the collaborative flow such as extended term creation and delete term. Then, you can associate the term types with specific users in the **Business Roles** table, which is described below.

For example, you can specify **Extended Create Term** for terms used in an extended collaborative flow. You can also specify **Create Term** for terms used in a simple collaborative flow. Finally, you have the option to not specify a workflow for terms that are not used in a collaborative flow.

The **Specify status values** table enables you to select a default status value to associate with the term, create new status values, and edit or delete existing status values. The following default status values are available: Production, Editing, On Hold, Under Review, and Not Specified.

The **Specify importance labels** table enables you to select a default importance to associate with the term or edit an existing label. The following importance labels are available: Critical, High, Medium, Low, Very Low, and Not Specified.

The **Business Roles** table enables you to create business role labels can be added to contacts for terms of this type. You can create notification groupings by associating these roles with specific groups of users. These labels do not affect which users can perform workflow actions for these terms.

Click **Attributes** to display the **Attributes** sub-tab in the **New Term Type** tab. The sub-tab displays a table that contains the list of attributes for the current term type. You can click **New Attribute** to define a new attribute and display it in the table. The attribute can include the following elements:

- **Label**
- **Instructions**
- **Type**, selection from the following options: Single Line Text Entry, Multi-Line Text Entry, Single Selection, Multiple Selection, and Boolean
- **Default value**

- **Require a value to be entered** check box

You can also edit, remove, and preview an existing attribute. Select the **Allow custom attributes to be added to terms** check box if you want to add and maintain attributes for individual terms of this type.

Review or Edit a Term Type

You can select an existing term type in the Term Type Manager window to review and edit its elements. Click **Save** to save your changes. Use caution when you update the attributes for a term type. When existing term types are imported, the attributes in the term type being imported replace the attributes in the term type that already exists in the SAS Business Data Network instance. The attributes also update existing terms of that type.

Import or Export Term Types

You can use the **Import Term Types** item in the **Action** menu in the Term Type Manager window to import XML lists of term types. Similarly, you can use the **Export Term Types** item in the **Action** menu in the Term Type Manager window to export XML lists of term types to a specified location.

Managing Deleted Terms

You can manage terms that you have marked for deletion. To access this window, click **Manage Deleted Terms** in the **Action** button at the top of SAS Business Data Network main window.

The Deleted Terms window contains all of the terms that have marked for deletion in SAS Business Data Network. You can use the toolbar or the **Action** button to perform the following functions:

- Restore one or more selected terms
- Purge one or more selected terms
- Purge all of the terms that are marked for deletion
- Refresh the list of deleted terms

Managing Root Level Authorizations

Overview

When you log on to SAS Business Data Network, you are granted access to applications and features based on the roles and capabilities that are associated with your login. Typically, these roles are assigned to a group to which you belong. For example, by default, members of the Data Management Executives group have the Data Management: Business Data Network role. This role has capabilities that enable you to view terms and their contents and notify contacts in SAS Business Data Network. Without these capabilities, you cannot see terms in SAS Business Data Network.

Note: You can add and remove identities in the Authorization - Root Level window. To access this window, click **Manage Root Level Authorizations** in the **Action** button at the top of SAS Business Data Network main window. Click **Help** for information about using the Authorization - Root Level window. Denying Create Children permission to a group or user at root level prevents that group or user from creating any term.

Default Groups, Roles, and Capabilities

The groups, roles, and capabilities listed in the following table are installed in SAS Management Console when SAS Business Data Network is installed:

Table 7.1 Default Groups, Roles, and Capabilities

Role Name	Role Description	Capability IDs	Groups That Get This Role by Default
Business Data Network: Administration	Provides all functionality related to administrative activities	ViewApplication, ViewTermAttributes, ViewTermStatus, ViewTermImportance, ViewTermLinks, ViewTermRelatedTags, ViewTermRelatedTerms, ViewTermHierarchy, ViewTermAssociatedItems, ViewTermNotes, ViewTermContacts, ViewTermHistory, ViewTermComments, EditTermTypes, SecureTermTypes, SecureTerms, ImportTerms, UnlockAnotherUsersTerms, ViewAnotherUsersDraft, ManageDeletedTerms, EditTags, EditTerms, EditTermContents, EditTermAttributes, EditTermStatus, EditTermImportance, EditTermLinks, EditTermRelatedTags, EditTermRelatedTerms, EditTermHierarchy, EditTermAssociatedItems, EditTermNotes, EditTermContacts, RestoreTermVersion, NotifyContacts, Workflow Publish, Workflow Delete	Data Management Administrators

Role Name	Role Description	Capability IDs	Groups That Get This Role by Default
Business Data Network: Power Editor	Provides all the functionality for creating and editing terms	ViewApplication, ViewTermAttributes, ViewTermStatus, ViewTermImportance, ViewTermLinks, ViewTermRelatedTags, ViewTermRelatedTerms, ViewTermHierarchy, ViewTermAssociatedItems, ViewTermNotes, ViewTermContacts, ViewTermHistory, ViewTermComments, UnlockAnotherUsersTerms, ImportTerms, EditTags, EditTerms, EditTermContents, EditTermAttributes, EditTermStatus, EditTermImportance, EditTermLinks, EditTermRelatedTags, EditTermRelatedTerms, EditTermHierarchy, EditTermAssociatedItems, EditTermNotes, EditTermContacts, RestoreTermVersion, NotifyContacts	Data Management Power Users
Business Data Network: Technical Editor	Provides all the functionality for creating and editing terms	ViewApplication, ViewTermAttributes, ViewTermStatus, ViewTermImportance, ViewTermLinks, ViewTermRelatedTags, ViewTermRelatedTerms, ViewTermHierarchy, ViewTermAssociatedItems, ViewTermNotes, ViewTermContacts, ViewTermHistory, ViewTermComments, EditTags, EditTerms, EditTermContents, EditTermAttributes, EditTermStatus, EditTermImportance, EditTermLinks, EditTermRelatedTags, EditTermRelatedTerms, EditTermHierarchy, EditTermAssociatedItems, EditTermNotes, EditTermContacts, RestoreTermVersion, NotifyContacts	Data Management Power Users
Business Data Network: Business Editor	Provides all the functionality for creating and editing terms	ViewApplication, ViewTermAttributes, ViewTermStatus, ViewTermImportance, ViewTermLinks, ViewTermRelatedTags, ViewTermRelatedTerms, ViewTermHierarchy, ViewTermAssociatedItems, ViewTermNotes, ViewTermContacts, ViewTermHistory, ViewTermComments, EditTags, EditTerms, EditTermContents, EditTermAttributes, EditTermStatus, EditTermImportance, EditTermLinks, EditTermRelatedTags, EditTermRelatedTerms, EditTermHierarchy, EditTermAssociatedItems, EditTermNotes, EditTermContacts, RestoreTermVersion, NotifyContacts	Data Management Business Users

Role Name	Role Description	Capability IDs	Groups That Get This Role by Default
Business Data Network: Technical Approver	Provides all the functionality for approving terms	ViewApplication, ViewTermAttributes, ViewTermStatus, ViewTermImportance, ViewTermLinks, ViewTermRelatedTags, ViewTermRelatedTerms, ViewTermHierarchy, ViewTermAssociatedItems, ViewTermNotes, ViewTermContacts, ViewTermHistory, ViewTermComments, EditTermNotes, EditTermContacts, NotifyContacts, Workflow Publish, Workflow Delete	Data Management Stewards
Business Data Network: Business Approver	Provides all the functionality for approving terms	ViewApplication, ViewTermAttributes, ViewTermStatus, ViewTermImportance, ViewTermLinks, ViewTermRelatedTags, ViewTermRelatedTerms, ViewTermHierarchy, ViewTermAssociatedItems, ViewTermNotes, ViewTermContacts, ViewTermHistory, ViewTermComments, EditTermNotes, EditTermContacts, NotifyContacts, Workflow Publish, Workflow Delete	Data Management Business Approvers;
Data Management: Business Data Network	Provides default access to Business Data Network	ViewApplication, ViewTermAttributes, ViewTermStatus, ViewTermImportance, ViewTermLinks, ViewTermRelatedTags, ViewTermRelatedTerms, ViewTermHierarchy, ViewTermAssociatedItems, ViewTermNotes, ViewTermContacts, ViewTermHistory, ViewTermComments, NotifyContacts	Data Management Executives

Define Users and Link Them to Groups (and Roles)

SAS Business Data Network is installed as part of a bundle of products. After installation, an administrator uses SAS Management Console to perform the following tasks:

- Create a user definition for each person who uses SAS Business Data Network
- Create any custom groups (and roles) that you might require if the default groups provided by SAS Business Data Network do not meet your needs
- Assign each user to one or more of the default or custom groups in order to grant each user the capabilities that he or she requires

For more information about defining users and groups in SAS Management Console, see *SAS Management Console: Guide to Users and Permissions*.

Part 2

Installation and Configuration

Chapter 8

***Installing and Configuring SAS Business Data Network* 77**

Chapter 9

***ASEXPORT Procedure* 89**

Chapter 8

Installing and Configuring SAS Business Data Network

Installing SAS Business Data Network	77
Performing SAS Business Data Network Migration	77
Overview	77
Begin Post-Installation Steps	78
Run the ASEXPORT Procedure	78
Prepare for Workflows	80
Export Relationships and Lineage to the Relationships Service	81
Run SAS Business Data Network Migration	83
Review Migration Results	84
Resolve Any Errors	85
Configuring Workflow in SAS Business Data Network	86
Overview	86
Set Permissions in Web Administration Console	86
Turn On Workflow Events	86
Add Connection Information to SAS Workflow Studio	87
Deploying Workflows in SAS Workflow Studio	87
Associating Workflows with Term Types	88

Installing SAS Business Data Network

SAS Business Data Network is available through SAS delivery channels. See your SAS Software Order Email (SOE) for information about installing SAS Business Data Network.

Performing SAS Business Data Network Migration

Overview

After you have installed SAS Business Data Network and reviewed [instructions.html](#), you are ready to migrate data from the Business Data Network module of DataFlux Web Studio 2.4 to SAS Business Data Network 3.1. Note that SAS Business Data Network

3.1 requires the second maintenance release for SAS 9.4. The migration process includes the following steps:

- “Begin Post-Installation Steps” on page 78
- “Run the ASEXPORT Procedure” on page 78
- “Prepare for Workflows” on page 80
- “Export Relationships and Lineage to the Relationships Service” on page 81
- “Run SAS Business Data Network Migration” on page 83
- “Review Migration Results” on page 84
- “Resolve Any Errors” on page 85

Begin Post-Installation Steps

Once SAS Business Data Network has been installed, you can perform post-installation steps. You must be an administrator who has the Business Data Network: Administration role.

Perform the following tasks to prepare for the migration:

- Verify that both the DataFlux Authentication Server and the SAS Metadata Server are running.
- Verify that you are a member of the SAS Administrators group on the SAS Metadata Server and an Administrator on the DataFlux Authentication Server. Ensure that you are logged on to each of these servers with the user ID and password that you specify when you run the ASEXPORT procedure.
- Stop the SASServer 13 running instance.
- Move the JDBC driver JAR file for the database that was used with the version of the Business Data Network module of DataFlux Web Studio that you are migrating to the proper location for the SAS Business Data Network installation. (Note that some databases might require more than one JAR file.) This step is necessary because the migration code needs JDBC 4 drivers for the appropriate source database to read the data from the old databases.

Typically, the JAR file can be found in the installation of the source database. If you are not sure which JAR files to use, ask your database administrator. You can also search the database vendor’s website. The JAR files must be appropriate for JDBC 4 and Java 6. They must also work with the correct version of your database. You might also need to copy other files, such as license files and ancillary JAR files.

After ensuring that SASServer 13 has been stopped, copy the JAR file (and any other files that are needed) to the lib directory under the SASServer13_1 installation. The path will vary by installation but will be similar to `C:\SAS\Config\Lev1\Web\WebAppServer\SASServer13_1\lib`.

- Restart SASServer13_1.

Run the ASEXPORT Procedure

You must run the ASEXPORT Procedure to move the DataFlux Authentication Server IDs to the SAS Metadata Server.

The following example shows this application of the ASEXPORT Procedure:

```
proc ASEXPORT meta=
  (
    user='username' password='password'
    server='host-name'
    port=port_number
    repos='repository.name'
    filter=(DOMAINS "*"
            USERS  "*"
            LOGINS  "Login
            [Domain/AuthenticationDomain[@OutboundOnly='0']]")
  )
  as=
  (
    server='host-name'
    user='domain\username'
    pass='password'
    port=port_number
    filter=(DOMAINS "*"
            USERS  "*"
            LOGINS  "**")
  )
  verbose
  out=asx
  ;

/*
 * Auto-match domains by name.
 */
match DOMAINS;

/*
 * Add remaining unmatched domains (optional)
 */
add DOMAINS;

/*
 * Auto-match users by FQLN.
 */
match USERS;

/*
 * Add remaining unmatched users (optional)
 */
add USERS;

/*
 * List everything for review
 */
list;

/*
 * Create an input file (per noforward) for proc METADATA that we can review.
 * Don't export passwords or their hosting outbound logins.
 */
```

```
export;

quit;
```

Note: This code sample has optional add statements that might not apply. If users or domains do not match, then they are created in SAS Metadata Server unconditionally. A

```
criteria=
```

option is required on the add statements to prevent the addition of all unmatched domains and users. You can also use an initial filter of something other than

```
*
```

to prevent unmatched domains and users from being available in the snapshot pulled back from DataFlux Authentication Server and SAS Metadata Server.

For more information about the ASEXPORT Procedure, see [Chapter 9, “ASEXPORT Procedure,” on page 89](#).

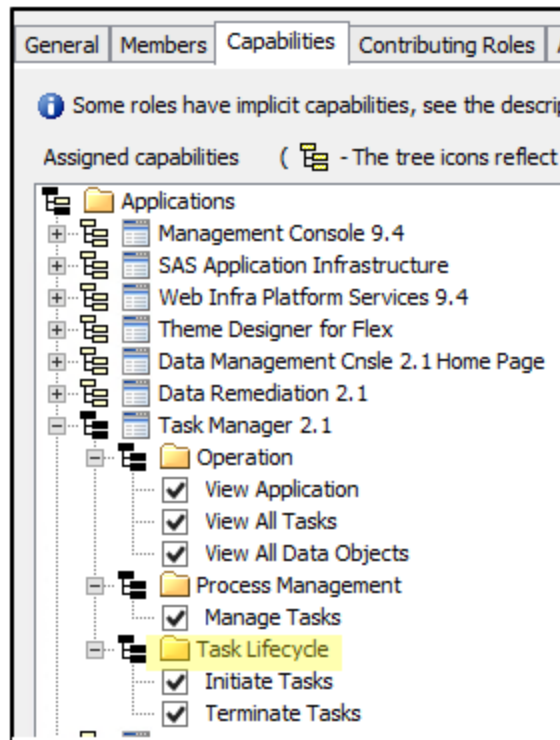
Prepare for Workflows

For information about preparing to support workflows in SAS Business Data Network, see [“Configuring Workflow in SAS Business Data Network” on page 86](#). You also must disable the Terminate Tasks capability in SAS Task Manager for most SAS Business Data Users. Disabling this capability can prevent the accidental termination of SAS Business Network workflows due to the termination of a SAS Task Manager task.

1. Log on to SAS Management Console as an administrative user.
2. Select a SAS Business Data Network role that you need to modify.
3. Click the **Capabilities** tab for that role.
4. Navigate to the Task Lifecycle folder under the Task Manager 2.1 folder.

The **Capabilities** tab is shown in the following display:

Figure 8.1 Capabilities Tab



5. Deselect the **Terminate Tasks** item.
6. Select the next SAS Business Data Network role to modify and perform the modification. Repeat until all the roles have been modified.

Export Relationships and Lineage to the Relationships Service

Overview

You must perform the following processes to ensure that the Relationships Service contains the data necessary for SAS Business Data Network to function:

Perform the following steps:

- Scheduled Collection and Loading Using SAS Management Console
- Export Data Management Platform Objects
- Export Visual Process Orchestration Objects

Scheduled Collection and Loading Using SAS Management Console

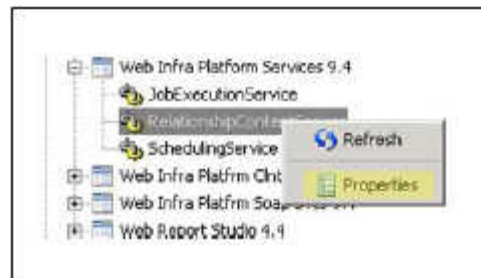
SAS Management Console is used to schedule the collection and loading of information about resources and their relationships. You must enable the relationship service collection and loading.

1. Log on to the SAS Management Console as an administrative user.
2. Expand the **Configuration Manager** under the **Application Management** node.
3. Expand **SAS Application Infrastructure**. Then, locate **Web Infra Platform Services 9.4** and expand the node.

4. Right-click **Select RelationshipContentService**.

Select **Properties** from the pop-up menu, as shown in the following display:

Figure 8.2 RelationshipContentService Path



5. On the **Settings** tab, change the value for **Scheduling for Load Task Enabled** from *false* to *true*.
6. Restart the web application server.

Relationship metadata is loaded into the relationship database when the web application server is restarted. The default setting schedules the load operation to occur every hour. Subsequent runs of the load operation search for all content that has been changed or created since the last load and update the relationship database for the changed objects. You can schedule the load to run hourly, daily, weekly, or you can create your own custom schedule.

Export Data Management Platform Objects

You must export Data Management Platform objects to the SAS Web Infrastructure Platform before clients such as SAS Business Data Network can then use the data. For instructions, see the “Exporting Lineage Data to SAS Web Infrastructure Platform” topic in *DataFlux Data Management: User’s Guide*.

SAS Business Data Network enables you to associate Data Management Platform objects such as rules, tasks, jobs, files, and other content to SAS Business Data Network objects. This feature can cause complications when you upgrade SAS Business Data Network at the same time that you upgrade Data Management Server.

When you do a side-by-side install of Data Management Server and SAS Business Data Network, the location of Data Management Platform objects changes from the Data Management Server 2.5 location. Therefore, the objects associated with SAS Business Data Network terms have different paths and need to be reassociated.

When you perform an upgrade in place of Data Management Server, the object locations stay the same. Most of the objects, except jobs, remain associated with SAS Business Data Network terms. You must follow all of the steps specified in the migration process.

Note: Job objects have changed pathnames and are not found in the new infrastructure. You must go into SAS Business Data Network 3.1 and reattach these objects after refreshing the lineage.

Export SAS Visual Process Orchestration Objects

SAS Visual Process Orchestration 2.2 exports relationship data to the SAS Web Infrastructure Platform so that clients such as SAS Business Data Network can use the data. After SAS Visual Process Orchestration 2.2 is shipped, you can find instructions in the *SAS Visual Process Orchestration: User’s Guide*.

Run SAS Business Data Network Migration

You must complete the fields and select options in the Business Data Network Migration window and run the migration to complete the migration process. The window is located at the following location: **yourserver:port/SASBusinessDataNetwork/migration/configure**. Note that you can execute an optional test run to anticipate problems.

The fields are listed in following table:

Table 8.1 SAS Business Data Network Migration Fields and Options

Field or Option	Description
Connection to BDN 2.x database server	
Type of database server	Specifies the databases that were supported by BDN 2.x: SQL Server, Oracle, and DB2.
Database server host	Specifies the name of the machine hosting the database server instance.
Database server port	(Optional) Specifies the port to which the database server instance is listening.
Database name	Specifies the name of the database within the server instance.
Override generated JDBC URL	The migration configuration generates a JDBC URL to connect to the BDN 2.x database. If a correct URL for the database cannot be generated by the migration code, selecting this check box enables the user to override the generated JDBC URL. This is used in case the user cannot resolve a connection problem.
JDBC URL to database	When Override generated JDBC URL is not selected, specifies the generated JDBC URL to the database. When Override generated JDBC URL is selected, the text field is editable so that you can enter the JDBC URL to the database.
BDN 2.x database connection properties	Specifies additional properties needed for connecting to the BDN 2.x database. An example for SQL Server is the instance name: <i>instanceName=SQLSERVER2008</i> .
Optional prefix for BDN 2.x tables	Specifies an optional prefix for the tables that can include catalog and schema prefixes. An example is <i>Repository1.BDN_</i> .
User name for database connection	Specifies the user name for connecting to the database.

Field or Option	Description
Password for database connection	Specifies the password for connecting to the database.
Options	
Keep temporary tables	When selected, specifies that the tables copied from the 2.x database to the 3.1 database are not dropped after running the migration. The copied tables are put into a schema named SAS_BDN_TEMP.
Skip copying the tables from the source BDN database	When selected, skips the step of copying the tables from the source BDN database. If the temporary tables are kept from a previous migration run, they can be reused in a subsequent migration run, thereby saving the time required to copy the tables again. There is no need to connect to the source BDN database when the copy is skipped. Therefore, the database values are not needed.
Test run	When selected, executes a migration run in which none of the SQL statements to create tables or write to tables are actually executed. Security, lineage, and user preferences are not updated. The source database tables are read.
Run	Runs the migration.

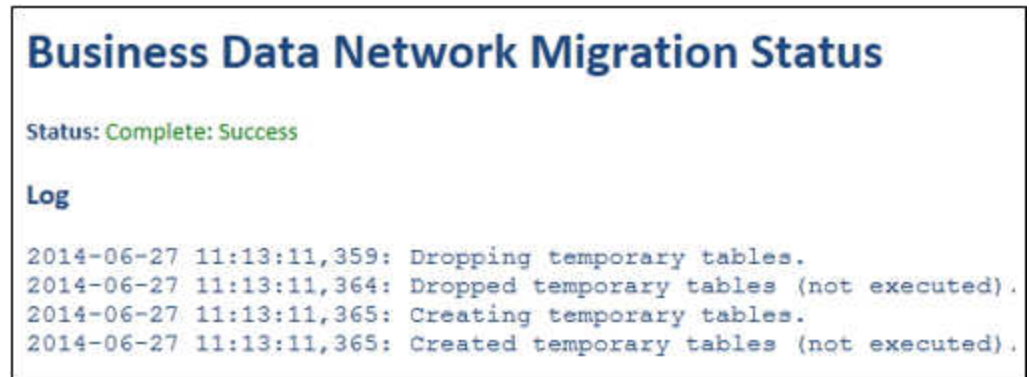
When you run the migration, an attempt to read one of the source BDN 2.1 tables is made (if the **Skip copying source tables** option is not selected). If that attempt fails, an error message is displayed in the user interface.

Review Migration Results

If the attempt is successful, the migration begins and the status page is displayed. The status page refreshes itself periodically.

When the migration is complete, the status page scrolls back to the top. The following display shows a portion status page from a test run:

Figure 8.3 Migration Run Status



Resolve Any Errors

You must manually resolve any errors uncovered in the migration run. Note that the following steps are executed during the migration.

1. If copying the source tables, the following steps are performed:
 - Temporary tables are dropped.
 - Temporary tables are created.
 - Source tables are copied into the temporary tables.
2. Users in the source BDN 2.x database are matched to users in SAS Metadata Server by DataFlux Authentication Server IDs. If a matching user is not found in SAS Metadata Server, the user's name is used as the user ID. This information is logged.
3. Target tables are truncated. Anything existing in the BDN 2.x database is lost. The truncate is required because of the number of foreign keys between tables.
4. The temporary tables are copied to the target table. During the copy, many items are added, updated, or replaced. These processes include the following steps:
 - Fragmented big strings are collapsed to single strings.
 - Account IDs are replaced with user IDs.
 - The template term is updated to a term type.
 - Type IDs are added.
 - Audit records in DG_NOTS are not copied.
5. Security ACLs are created for all terms. This process is slow. Therefore, the ACLs are created in batches of one thousand in order to give an indication of progress.
6. Relationships are pushed into the relationships database. This process is slow.
7. Notification settings are copied to the preferences service.

Configuring Workflow in SAS Business Data Network

Overview

This document lists the steps for deploying and using workflows that enable the collaborative term review and approval process in SAS Business Data Network. The SAS Workflow Studio client is needed to deploy the workflows, but it does not have to be installed on the same machine as the server.

Perform the following tasks:

- “Set Permissions in Web Administration Console” on page 86
- “Turn On Workflow Events” on page 86
- “Add Connection Information to SAS Workflow Studio” on page 87
- “Deploying Workflows in SAS Workflow Studio” on page 87
- “Associating Workflows with Term Types” on page 88

Set Permissions in Web Administration Console

1. Log on to `http://<your server>:port/SASAdmin` as an administrative user. If a user-defined port number is supplied during installation, place it after the server name.
2. Select the **Assign Roles** action in the tree (**SAS Web Administration Console** ⇒ **Environment Management** ⇒ **Authorization** ⇒ **Assign Roles**).
3. Add roles to each workflow user, as appropriate. These roles can include those of Administrator, Workflow Administrator, Workflow Viewer, and Workflow Editor. You must perform this task for each user separately.

Turn On Workflow Events

In the file `C:\SAS\Config\Lev1\Web\WebAppServer\SASServer1_1\sas_webapps\sas.workflow.war\WEB-INF\spring-config\messaging-config.xml`, change the default-request-channel value for workflow events from `nullChannel` to `workflowEventFilterTransformChannel`. Note that the exact path might differ depending on your deployment’s server definitions.

The original tag is shown in the following display:

Figure 8.4 Original Tag

```
<si:gateway id="workflowSendEventGateway" service-  
interface="com.sas.workflow.integration.WorkflowEventGateway" default-request-  
channel="nullChannel"/>
```

The modified tag is shown in the following display:

Figure 8.5 Modified Tag

```
<si:gateway id="workflowSendEventGateway" service-  
interface="com.sas.workflow.integration.WorkflowEventGateway" default-request-  
channel="workflowEventFilterTransformChannel"/>
```

Afterward, restart the following services:

- SAS httpd - WebServer
- SAS WebAppServer SASServer1_1
- SAS WebAppServer SASServer2_1
- SAS WebAppServer SASServer13_1

Note that this list might differ depending on your deployment.

Add Connection Information to SAS Workflow Studio

In the file `C:\Program Files\SASHome\SASWorkflowStudio\1.3\environments.xml`, add an entry to specify your connection information.

The following display shows a sample connection information entry:

Figure 8.6 Connection Information

```
<environment name="server name" default="false" platform-version="9.4">  
  <desc>fully qualified server name</desc>  
  <block-desc> fully qualified server name </block-desc>  
  <service-registry>  
    http:// fully qualified server name:7980/SASWIPClientAccess/remote/ServiceRegistry  
  </service-registry>  
  <service-registry interface-type="soap">  
    http:// fully qualified server name:7980/SASWIPSoapService/remote/ServiceRegistry  
  </service-registry>  
</environment>
```

This entry must specify the actual machine name and not an alias. Otherwise, SAS Workflow Studio displays an error when it tries to resolve the alias.

For more information about workflow configuration, see the *SAS Intelligence Platform: Web Application Administration Guide*.

Deploying Workflows in SAS Workflow Studio

1. Start SAS Workflow Studio.
2. Log on as an administrative user. Use the path **Server** ⇒ **Log On** to connect to the server that you added to the environments file in the Add Connection Information to SAS Workflow Studio section.
3. Navigate to **Manage Templates** in the **Server** section. Click **New Tags** and create a new tag named **BusinessData**. This tag marks a workflow as one that is usable in SAS Business Data Network.

4. Open a workflow file that you want to deploy. You can find the default SAS Business Data Network workflows at the following location: **SASHome\SASBusinessDataNetworkMidTier\3.1\Config\workflows**.
5. Navigate to **Save to Repository** under **Server**. Select the **Activate** check box and click **OK** to deploy the workflow.
6. Repeat steps 4 and 5 for each workflow that you want to deploy.

Associating Workflows with Term Types

Open the Manage Term Types view in SAS Business Data Network. Then open a term type. You can choose a workflow that you deployed in the previous section as the Create, Edit, or Delete workflow for the term type.

Chapter 9

ASEXPORT Procedure

Overview: ASEXPORT Procedure	89
Concepts: ASEXPORT Procedure	90
Overview	90
AS Schema	90
META Schema	91
X Schema	92
Syntax: ASEXPORT Procedure	95
PROC ASEXPORT Statement	96
MATCH Statement	100
MATCH SINGLETON Statement	101
ADD Statement	103
REMOVE Statement	104
LIST Statement	105
EXPORT Statement	105
UNDO Statement	106
Example: Exporting from a DataFlux Authentication Server to a SAS Metadata Server	107

Overview: ASEXPORT Procedure

The ASEXPORT procedure is a SAS procedure used to migrate metadata from DataFlux Authentication Server to SAS Metadata Server. The procedure supports direct object migration through the SAS Open Metadata Interface. It also supports the creation of an export package that is compatible with PROC METADATA.

The following steps illustrate the workings of the ASEXPORT procedure:

1. The META= connection and filter parameters are used to connect to SAS Metadata Server..
2. The AS= connection and filter parameters are used to connect to DataFlux Authentication Server.
3. The MATCH, MATCH SINGLETON, ADD, and DELETE statements use these working sets to build up the mappings between DataFlux Authentication Server and SAS Metadata Server objects.
4. The LIST statement lists them.

5. The EXPORT statement exports them to a file, forwards them to the SAS Metadata Server, or both.
6. The file created by the EXPORT statement can be used directly by the METADATA procedure as its IN= procedure option.

Concepts: ASEXPORT Procedure

Overview

The matches between DataFlux Authentication Server and SAS Metadata Server objects are managed internally by the relationships in the tabular data represented in the following three schemas:

- AS Schema
- META Schema
- X Schema

Note that the maximal set of working objects available for export is controlled by the various filters specified on the procedure statement.

AS Schema

The AS schema includes the working set of DataFlux Authentication Server objects that are extracted using the initial filters specified in the AS(FILTER) procedure suboptions. The AS schema is a one to one tabular snapshot of Authentication Server objects read in using the META/FILTER options.

This schema consists of the following tables:

DOMAINS

extracted using the AS(FILTER(DOMAINS)) suboption.

USERS

extracted using the AS(FILTER(USERS)) suboption.

GROUPS

extracted using the AS(FILTER(GROUPS)) suboption.

LOGINS

extracted using the AS(FILTER(LOGINS)) suboption.

The AS schema contains a representation of the DataFlux Authentication Server objects currently in the working set of source objects. These objects are available for selection into the working set of export mappings in the X.DOMAIN_MAP, X.USER_MAP and X.GROUP_MAP tables. The schema is displayed in the following sample:

```
create table AS.DOMAINS
(
  NAME              NVARCHAR(256)  NOT NULL,
  NAME_N            NVARCHAR(256)  NOT NULL,
  "DESC"            NVARCHAR(256)  NOT NULL,
  IS_CS_USERID      NCHAR(1)       NOT NULL,
  IS_DQ_USERID      NCHAR(1)       NOT NULL,
```

```

        IS_UPN_USERID      NCHAR(1)      NOT NULL
    );
create table AS.USERS
(
    ID                      NCHAR(32)      NOT NULL,
    NAME                    NVARCHAR(256)  NOT NULL,
    NAME_N                  NVARCHAR(256)  NOT NULL,
    "DESC"                  NVARCHAR(256)  NOT NULL,
    ENABLED                 NCHAR(1)      NOT NULL
);
create table AS.LOGINS
(
    FQLN                    NVARCHAR(256)  NOT NULL,
    DOMAIN_N                NVARCHAR(256)  NOT NULL,
    NAME                    NVARCHAR(256)  NOT NULL,
    USER_ID                 NCHAR(32)      NOT NULL
);
create table AS.GROUPS
(
    ID                      NCHAR(32)      NOT NULL,
    NAME                    NVARCHAR(256)  NOT NULL,
    NAME_N                  NVARCHAR(256)  NOT NULL,
    "DESC"                  NVARCHAR(256)  NOT NULL,
    OWNER_ID                NCHAR(32)
);

```

META Schema

The META schema includes the working set of SAS Metadata Server objects extracted using the initial filters specified in the META(FILTER) procedure suboptions.

This schema consists of the following tables:

DOMAINS

extracted using the META(FILTER(DOMAINS)) suboption.

USERS

extracted using the META(FILTER(GROUPS)) suboption.

GROUPS

extracted using the META(FILTER(GROUPS)) suboption.

LOGINS

extracted using the META(FILTER(LOGINS)) suboption.

The META schema contains a representation of the SAS Metadata Server objects currently in the working set of destination objects. These objects are available for selection into the working set of export mappings in the X.DOMAIN_MAP, X.USER_MAP and X.GROUP_MAP tables. The schema is displayed in the following sample:

```

create table META.DOMAINS
(
    ID                      NCHAR(17)      NOT NULL,
    AS_ID                   NVARCHAR(128),
    NAME                    NVARCHAR(60)    NOT NULL,
    NAME_N                  NVARCHAR(60)    NOT NULL,
    "DESC"                  NVARCHAR(200)   NOT NULL,

```

```

        OUTBOUND_ONLY    NCHAR(1)        NOT NULL,
        TRUSTED_ONLY     NCHAR(1)        NOT NULL
    );
create table META.USERS
(
    ID                    NCHAR(17)       NOT NULL,
    AS_ID                NCHAR(32),
    NAME                  NVARCHAR(60)    NOT NULL,
    NAME_N                NVARCHAR(60)    NOT NULL,
    "DESC"                NVARCHAR(200)   NOT NULL
);
create table META.LOGINS
(
    ID                    NCHAR(17)       NOT NULL,
    AS_ID                NVARCHAR(128),
    FQLN                  NVARCHAR(128)   NOT NULL,
    NAME                  NVARCHAR(60)    NOT NULL,
    "DESC"                NVARCHAR(200)   NOT NULL,
    DOMAIN_ID             NCHAR(17)       NOT NULL,
    OWNER_ID              NCHAR(17)       NOT NULL,
    TRUSTED_ONLY          NCHAR(1)        NOT NULL
);
create table META.GROUPS
(
    ID                    NCHAR(17)       NOT NULL,
    AS_ID                NVARCHAR(32),
    NAME                  NVARCHAR(60)    NOT NULL,
    NAME_N                NVARCHAR(60)    NOT NULL,
    "DESC"                NVARCHAR(200)   NOT NULL
);

```

X Schema

The X schema includes normalized content, views, and joined result sets produced from matches between objects represented in the AS and META schemas.

This schema consists of the following tables or views:

DOMAIN_MAP

contains the working set of (AS:Domain, OMSOBJ:AuthenticationDomain) domain mappings currently queued for export.

USER_MAP

contains the working set of (AS:Group, OMSOBJ:IdentityGroup) group mappings currently queued for export.

GROUP_MAP

contains the working set of (AS:Group, OMSOBJ:IdentityGroup) group mappings currently queued for export.

AS_LOGINS_N

contains views of AS.LOGINS with additional FQLN_N column where the column contains a normalized fully qualified login name that can be matched with logins in MS.LOGINS. Login name qualification and normalization is governed by the naming rules inferred from the AS.DOMAINS(IS_CS_USERID, IS_DQ_USERID, IS_UPN_USERID) columns.

MS_LOGINS_N

contains views of MS.LOGINS with additional FQLN_N column where the column contains a normalized fully qualified login name that can be matched with logins in AS.LOGINS. Login name qualification and normalization is governed by the naming rules inferred from the AS.DOMAINS(IS_CS_USERID, IS_DQ_USERID, IS_UPN_USERID) columns.

The X schema contains the working set of DataFlux Authentication Server:SAS Metadata Server export mappings. These mappings are used along with utility tables to assist in matching and selection criteria when using the MATCH, MATCH SINGLETON, ADD, and REMOVE statements.

The contents are listed in following table:

Table 9.1 X Schema Contents

Table or View	Description
X.DOMAIN_MAP	Current working set of domain object mappings.
X.USER_MAP	Current working set of user object mappings.
X.GROUP_MAP	Current working set of group object mappings.
X.AS_LOGINS_N	View of AS.LOGINS with normalized fully qualified login name column, FQLN_N.
X.MS_LOGINS_N	View of META.LOGINS with normalized fully qualified login name, FQLN_N.

The schema is displayed in the following sample:

```
create table X.DOMAIN_MAP
(
  AS_NAME          NVARCHAR(256)  NOT NULL,
  AS_NAME_N        NVARCHAR(256)  NOT NULL,
  AS_DESC          NVARCHAR(256)  NOT NULL,
  AS_IS_CS_USERID  NCHAR(1)       NOT NULL,
  AS_IS_DQ_USERID  NCHAR(1)       NOT NULL,
  AS_IS_UPN_USERID NCHAR(1)       NOT NULL,
  META_ID          NCHAR(17) ,
  META_AS_ID       NVARCHAR(128) ,
  META_NAME        NVARCHAR(60)   NOT NULL,
  META_NAME_N      NVARCHAR(60)   NOT NULL,
  META_DESC        NVARCHAR(200)  NOT NULL,
  META_OUTBOUND_ONLY NCHAR(1)     NOT NULL,
  META_TRUSTED_ONLY NCHAR(1)     NOT NULL
);
create table X.USER_MAP
(
  AS_ID          NCHAR(32)       NOT NULL,
  AS_NAME        NVARCHAR(256)  NOT NULL,
  AS_NAME_N      NVARCHAR(256)  NOT NULL,
  AS_DESC        NVARCHAR(256)  NOT NULL,
  AS_ENABLED     NCHAR(1)       NOT NULL,
  META_ID        NCHAR(17) ,
```

```

        META_AS_ID          NCHAR(32),
        META_NAME           NVARCHAR(60)    NOT NULL,
        META_NAME_N         NVARCHAR(60)    NOT NULL,
        META_DESC           NVARCHAR(200)   NOT NULL
    );
create table X.GROUP_MAP
(
    AS_ID                    NCHAR(32)      NOT NULL,
    AS_NAME                 NVARCHAR(256)   NOT NULL,
    AS_NAME_N              NVARCHAR(256)   NOT NULL,
    AS_DESC                NVARCHAR(256)   NOT NULL,
    AS_OWNER_ID            NCHAR(32),
    META_ID                NCHAR(17),
    META_AS_ID             NCHAR(32),
    META_NAME              NVARCHAR(60)    NOT NULL,
    META_NAME_N            NVARCHAR(60)    NOT NULL,
    META_DESC              NVARCHAR(200)   NOT NULL
);
create view X.AS_LOGINS_N as
    select AL.*,
        case
            when (DX.AS_IS_DQ_USERID || DX.AS_IS_CS_USERID) = 'FF' then
                upper(AL.NAME)
            when (DX.AS_IS_DQ_USERID || DX.AS_IS_CS_USERID) = 'FT' then
                AL.NAME
            when (DX.AS_IS_DQ_USERID || DX.AS_IS_CS_USERID) = 'TF' then
                upper(AL.NAME) || '@' || AL.DOMAIN_N
            else
                AL.NAME || '@' || AL.DOMAIN_N
        end as "FQLN_N"
    from AS.LOGINS          AL,
        X.DOMAIN_MAP_ALL DX
    where AL.DOMAIN_N = DX.AS_NAME_N
;
create view X.MS_LOGINS_N as
    select ML.*,
        case
            when (DX.AS_IS_DQ_USERID || DX.AS_IS_CS_USERID) = 'FF' then
                upper(ML.NAME)
            when (DX.AS_IS_DQ_USERID || DX.AS_IS_CS_USERID) = 'FT' then
                ML.NAME
            when (DX.AS_IS_DQ_USERID || DX.AS_IS_CS_USERID) = 'TF' then
                upper(ML.NAME) || '@' || DX.AS_NAME_N
            else
                ML.NAME || '@' || DX.AS_NAME_N
        end as "FQLN_N"
    from META.LOGINS        ML,
        X.DOMAIN_MAP_ALL DX
    where ML.DOMAIN_ID = DX.META_ID
;

```

Syntax: ASEXPORT Procedure

Requirement: The target SAS Metadata Server and the source DataFlux Authentication Server must be running. Connection information for these servers must be available. A trusted user must also be available.

Tip: PROC ASEXPORT supports RUN-group processing.

```
PROC ASEXPORT<proc-options>;
  MATCH DOMAIN | USER | GROUP / <match-options>;
  MATCH SINGLETON DOMAIN | USER | GROUP / <match-options>;
  ADD DOMAIN | USER | GROUP / <add-options>;
  REMOVE DOMAIN | USER | GROUP / <remove-options>;
  LIST <type-list> / <list-options>;
  EXPORT / <export-options>;
  UNDO;
```

Statement	Task	Example
PROC ASEXPORT	Export or migrate DataFlux Authentication Server content.	Ex. 1
MATCH	Match DataFlux Authentication Server objects with an equivalent SAS Metadata Server objects and place the matches into the working set of export mappings.	Ex. 1
MATCH SINGLETON	Match a single DataFlux Authentication Server object with an equivalent SAS Metadata Server object and place the match into the working set of export mappings.	Ex. 1
ADD	Add DataFlux Authentication Server objects that are unmatched in the working set of SAS Metadata Server objects to the working set of export mappings.	Ex. 1
REMOVE	Remove objects matching the specified criteria from the working set of export mappings.	Ex. 1
LIST	List the current working set of export mappings in the SAS log.	Ex. 1
EXPORT	Export the working set of export mappings and clear the mapping tables, X.DOMAIN_MAP, X.USER_MAP and X.GROUP_MAP.	Ex. 1
UNDO	Undo changes to the working set of export mappings. These mappings result from the most recent MATCH, MATCH SINGLETON, ADD, or REMOVE statement that was not followed by a RUN or EXPORT statement.	Ex. 1

PROC ASEXPORT Statement

Exports or migrates DataFlux Authentication Server content.

Syntax

PROC ASEXPORT

```
<METACON=(SAS-Metadata-Server-connection-arguments)>
<ASCON=(DataFlux-Authentication-Server-connection-arguments)>
<OUT=fileref>
<HEADER=NONE | SIMPLE | FULL>
<VERBOSE>
;
```

Optional Arguments

METACON=(*metadata-server-connection-arguments*)

Server connection arguments establish communication with SAS Metadata Server. The metadata system options are used in place of omitted attributes.

FILTER=(*filter-strings*)

is the set of filter strings used to retrieve the working set of SAS Metadata Server objects using a templated GetMetadataObjects query with a XMLSelect search criteria. There is one filter per object type. If a filter is "*" or is omitted, then no subsetting is done when retrieving the objects and all objects of the associated metadata type are retrieved.

METACON uses the following filter strings:

DOMAINS="XMLSelect-search-filter"

specifies a valid XMLSelect search= string used to match objects of type AuthenticationDomain.

USERS="XMLSelect-search-filter"

specifies a valid XMLSelect search= string used to match objects of type Person.

GROUPS="XMLSelect-search-filter"

specifies a valid XMLSelect search= string used to match objects of type IdentityGroup.

Restriction The GROUPS option is not supported for SAS Business Data Network.

LOGINS="Select-filter"

specifies the search criteria used to match objects of type Login. The filter is the value of the Search= attribute of the Logins association specified in the query template.

PASSWORD="password"

is the password for the authenticated user ID on SAS Metadata Server.

Alias PW= or METAPASS=

PORT=number

is the TCP port that SAS Metadata Server listens to for requests. This port number was used to start the SAS Metadata Server.

Alias METAPORT=

Requirement Do not enclose the port number in quotation marks.

REPOSITORY=repository-name

is the name of the repository to use for all SAS Metadata Server requests. The repository name must be *foundation*.

Alias METAREPOSITORY=

SERVER="host-name"

is the host name or network IP address of the computer that hosts SAS Metadata Server. The value LOCALHOST can be used if the SAS session is connecting to SAS Metadata Server on the same computer.

Alias METASERVER= or HOST= or IPADDR=

USER="authenticated-user-ID"

is an authenticated user ID on SAS Metadata Server. SAS Metadata Server supports several authentication providers.

Alias METAUSER= or ID= or USERID=

Alias META=

ASCON=(authentication-server-connection-arguments)

server connection arguments establish communication with DataFlux Authentication Server.

FILTER=(filter-strings)

is the set of filter strings used to retrieve the working set of DataFlux Authentication Server objects. Filter strings are simple name and value pairs or value lists where values are ODBC pattern strings or constants. There is one filter per object type. If a filter is "*" or is omitted, then no subsetting is done when retrieving the objects and all objects of the associated type are retrieved.

ASCON uses the following filter strings:

DOMAINS="domains-filter"

specifies a valid domain search filter. The following filter columns are supported :

caseSensitivity=TRUE|T|YES|1|
FALSE|F|NO|0

specifies to select domains with principal identities matching the specified case sensitivity Boolean. The specified value is compared as case insensitive.

description=domain-description

specifies to select domains that pass the specified description pattern. The specified value is compared as case insensitive and should be quoted.

<code>domain=domain-name (domain-name1, domain-name2 ...)</code>	specifies to select domains that meet the specified pattern. Values are compared as case insensitive and can be quoted.
<code>partOfLogin=TRUE T YES I FALSE F NO 0</code>	Specifies to select domains that match the specified part of login Boolean. The specified value is compared as case insensitive.
<code>isUPN=TRUE T YES I FALSE F NO 0</code>	specifies to select domains that match the specified is UPN Boolean. The specified value is compared as case insensitive.

USERS="XMLSelect-search-filter"

specifies a valid user search filter. The following filter columns are supported:

<code>subject=user-name (user- name1, user-name2 ...)</code>	specifies to select users that match the specified names. Values are compared case insensitive and can be quoted.
<code>identifier=user-identifier (user-identifier1, user- identifier2 ...)</code>	specifies to select users that match the unique user identifiers. Values are compared as case insensitive.
<code>description=user-description</code>	specifies to select users that pass the specified user description pattern. Values are compared as case insensitive and should be quoted.
<code>enabled=TRUE T YES I FALSE F NO 0</code>	specifies to TRUE if the user is enabled.

GROUPS="XMLSelect-search-filter"

specifies a valid group search filter. The following filter columns are supported:

<code>group=group-name (group- name1, group-name2 ...)</code>	specifies the name of group. Values are compared as case insensitive and can be quoted.
<code>identifier=group-identifier (group-identifier1, group- identifier2 ...)</code>	specifies to select groups that match the unique group identifiers. Values are compared as case insensitive.
<code>description=group- description</code>	specifies to select groups that pass the specified group description pattern. Values are compared as case insensitive and should be quoted.
<code>ownerName=group-owner- name</code>	specifies the name of group's user owner. The value is compared as case insensitive and can be quoted.

Restriction The GROUPS option is not supported for SAS Business Data Network.

LOGINS=*"Select-filter"*

specifies a valid user login search filter. The filter is the value of the Search= attribute of the Logins association specified in the query template. The select filter is a domain name or list of domain names, specified as follows:

domain-name | (domain-name1, domain-name2 ...)

PASSWORD=*"password"*

is the password for the authenticated user ID on DataFlux Authentication Server.

Alias PW=

PORT=*number*

is the TCP port that DataFlux Authentication Server listens to for requests. This port number was used to start the DataFlux Authentication Server.

Requirement Do not enclose the port number in quotation marks.

SERVER=*"host-name"*

is the host name or network IP address of the computer that hosts DataFlux Authentication Server. The value LOCALHOST can be used if the SAS session is connecting to DataFlux Authentication Server on the same computer.

Alias HOST= or IPADDR=

URI=*"IOM-uri"*

is the complete IOM uri specification of DataFlux Authentication Server. A URI can be specified instead of the server and port.

USER=*"authenticated-user-ID"*

is an authenticated user ID on DataFlux Authentication Server. DataFlux Authentication Server supports several authentication providers.

Alias ID= or USERID=

OUT=*fileref*

specifies an XML file used by the EXPORT statement to store either the output result returned by SAS Metadata Server or the input that would have been submitted to SAS Metadata Server when exported using the NOFORWARD option. The value must be a fileref, not a pathname. Therefore, you must first submit a FILENAME statement to assign a fileref to a pathname. In most cases, the output XML string is identical to the input XML string, with the addition of the requested values within the XML elements.

If the OUT= argument is omitted and the VERBOSE option is specified, PROC ASEXPORT output is written to the SAS log.

Note: PROC ASEXPORT can generate large XML output. You might need to specify a large LRECL value or RECFM=N (streaming output) to avoid truncation of long output lines.

Note: Under z/OS, fixed-length records in the XML method call are not supported by PROC METADATA. Specify RECFM=V (or RECFM=N as suggested above) when you create the XML method call.

Alias OUTFILE=

Restriction SAS Business Data Network does not support z/OS connections.

HEADER= NONE | SIMPLE | FULL

specifies whether to include an XML header in the output FILE= and OUT= XML files. The declaration specifies the character-set encoding for web browsers and XML parsers to use when processing national language characters in the output XML file.

NONE

omits an encoding declaration. Web browsers and parsers might not handle national language characters appropriately.

SIMPLE

inserts an XML header that specifies the XML version number: This is the default value when the HEADER= argument is not specified.

FULL

inserts an XML declaration that represents the encoding that was specified when creating the output XML file. The source for the encoding varies, depending on the operating environment. In general, the encoding value is taken from the ENCODING= option specified in the FILENAME statement, or from the ENCODING= system option.

SAS attempts to use that encoding for the output XML file (and in the XML header). The encoding can vary. A single encoding can have multiple names or aliases that can appear in the XML header. These names might not be valid or recognized in all XML parsers. When generating the encoding attribute in the XML header, SAS attempts to use an alias that will be recognized by Internet Explorer. If the alias is not found, SAS attempts to use a name that will be recognized by Java XML parsers. If the name is not found, SAS uses an alias by which SAS will recognize the encoding.

VERBOSE

specifies to print input or output XML strings to the SAS log.

MATCH Statement

Matches DataFlux Authentication Server objects with an equivalent SAS Metadata Server objects and places the matches into the working set of export mappings. The MATCH statement name is followed by the type of object being matched for export. This object type can be DOMAIN, USER, or GROUP. The MATCH statement has two options, CRITERIA= and LOG.

Syntax

```
MATCH <type> / <match-options>;
    <CRITERIA="match-criteria">
    <LOG>
```

Optional Arguments

CRITERIA="match-criteria"

specifies match criteria used to associate DataFlux Authentication Server objects and SAS Metadata Server objects for insertion into the working set of export mappings. The criteria must be valid SQL WHERE syntax that does not use the WHERE keyword. It must reference only the SQL entities available for the type of objects being matched.

The following table lists those entities per object type:

Table 9.2 Match Entities

Type	SQL Entities Available in Match Criteria WHERE Clause
DOMAINS	All columns in AS.DOMAINS and META.DOMAINS
USERS	All columns in AS.USERS, META.USERS, X.AS_LOGINS_N, and X.MS_LOGINS_N
GROUPS	All columns in AS.GROUPS and META.GROUPS

The MATCH statement *always* joins objects using the default matching criteria per object type and then subsets based on the CRITERIA= WHERE clause specified. If omitted, a CRITERIA= value of “1=1” is implied so that no further subsetting occurs.

The following table documents the default match criteria per object type:

Table 9.3 MATCH Criteria

Type	Default CRITERIA= value
DOMAINS	(AS.DOMAINS.NAME_N=META.DOMAINS.NAME_N) and (META.DOMAINS.AS_ID is NULL)
USERS	(X.AS_LOGINS_N.USER_ID=AS.USERS.ID) and (X.MS_LOGINS_N.FQLN_N=X.AS_LOGINS_N.FQLN_N) and (META.USERS.ID=X.MS_LOGINS_N.OWNER_ID) and (META.USERS.AS_ID is NULL)
GROUPS	(AS.GROUPS.NAME_N=META.GROUPS.NAME_N) and (META.GROUPS.AS_ID is NULL)

LOG

specifies to print match results in the SAS log.

MATCH SINGLETON Statement

Matches a single DataFlux Authentication Server object with an equivalent SAS Metadata Server object and places the match into the working set of export mappings. The MATCH SINGLETON statement name is followed by the type of object being matched for eventual export. The object type can be DOMAIN, USER, or GROUP. The MATCH SINGLETON statement has two options, CRITERIA and LOG.

Syntax

```
MATCH SINGLETON <type> / <match-singleton-options>;
<CRITERIA="match-criteria">
```

<LOG>

Optional Arguments**CRITERIA="match-criteria"**

specifies match criteria used to associate a single DataFlux Authentication Server object with a single SAS Metadata Server object for insertion into the working set of export mappings. The criteria must be valid SQL WHERE syntax that does not use the WHERE keyword. It must reference only the SQL entities available for the type of objects being matched.

The following table lists those entities per object type:

Table 9.4 MATCH SINGLETON Entities

Type	SQL Entities Available in Match Criteria WHERE Clause
DOMAINS	All columns in AS.DOMAINS and META.DOMAINS
USERS	All columns in AS.USERS, META.USERS, X.AS_LOGINS_N, and X.MS_LOGINS_N
GROUPS	All columns in AS.GROUPS and META.GROUPS

The MATCH SINGLETON statement *always* joins objects using the default matching criteria per object type and then subsets based on the user's CRITERIA= WHERE clause. If omitted, a CRITERIA= value of "1=1" is implied such that no further subsetting occurs. Specifying criteria that produces more than one match results in an error, and no additional mapping is queued for export. The following table documents the default match singleton criteria per object type:

The following table documents the default match singleton criteria per object type:

Table 9.5 MATCH SINGLETON Criteria

Type	Default CRITERIA= value
DOMAINS	<i>The domain is neither already exported nor queued for export in the current working set of export mappings.</i>
USERS	(X.AS_LOGINS_N.USER_ID=AS.USERS.ID) and (X.MS_LOGINS_N.OWNER_ID=META.USERS.ID) and <i>The user is neither already exported nor queued for export in the current working set of export mappings.</i>
GROUPS	<i>The group is neither already exported nor queued for export in the current working set of export mappings.</i>

LOG

specifies to print match results in the SAS log.

ADD Statement

Adds DataFlux Authentication Server objects that are unmatched in the working set of SAS Metadata Server objects to the working set of export mappings. The ADD statement name is followed by the type of object being added for export. The object type can be DOMAIN, USER, or GROUP. The ADD statement has two options, CRITERIA and LOG.

Syntax

```
ADD <type> / <add-options>;
    <CRITERIA="match-criteria">
    <LOG>
```

Optional Arguments

CRITERIA="match-criteria"

specifies criteria used to select DataFlux Authentication Server objects into the working set of export mappings. The criteria must be valid SQL WHERE syntax that does not use the WHERE keyword. It must reference only the SQL entities available for the type of objects being matched.

The following table lists those entities per object type:

Table 9.6 ADD Entities

Type	SQL Entities Available in Match Criteria WHERE Clause
DOMAINS	All columns in AS.DOMAINS
USERS	All columns in AS.USERS, X.AS_LOGINS_N
GROUPS	All columns in AS.GROUPS

The ADD statement *always* selects AS objects using the default criteria per object type and then subsets based on the CRITERIA= WHERE clause specified. If omitted, a CRITERIA= value of "1=1" is implied such that no further subsetting occurs.

The following table documents the default add criteria per object type:

Table 9.7 ADD Criteria

Type	Default CRITERIA= value
DOMAINS	The domain is neither already exported nor queued for export in the current working set of export mappings.

Type	Default CRITERIA= value
USERS	(X.AS_LOGINS_N.USER_ID=AS.USERS.ID) and <i>The user is neither already exported nor queued for export in the current working set of export mappings.</i>
GROUPS	<i>The group is neither already exported nor queued for export in the current working set of export mappings.</i>

LOG

specifies to print ADD statement results in the SAS log.

REMOVE Statement

Removes objects matching the specified criteria from the working set of export mappings. The REMOVE statement name is followed by the type of objects being removed from the working set of export mappings. The object type can be DOMAIN, USER, or GROUP. The REMOVE statement has two options, CRITERIA and LOG.

Syntax

```
REMOVE <type> / <remove-options>;
    <CRITERIA="match-criteria">
    <LOG>
```

Optional Arguments

CRITERIA="match-criteria"

specifies criteria used to select DataFlux Authentication Server objects into the working set of export mappings. The criteria must be valid SQL WHERE syntax that does not use the WHERE keyword. It must reference only the SQL entities available for the type of objects being matched:

```
remove domains / criteria="x.domain_map.as_name_n='EURNET'" log;
```

The following table lists those entities per object type:

Table 9.8 REMOVE Criteria

Type	SQL Entities Available in Match Criteria WHERE Clause
DOMAINS	All columns in X.DOMAIN_MAP
USERS	All columns in X.USER_MAP
GROUPS	All columns in X.GROUP_MAP

The MATCH statement always selects objects mapped for export (those accumulated via the prior MATCH, MATCH SINGLETON, and ADD statements) using the specified criteria. The default CRITERIA= value is always “1=1” such that all export mappings are cleared.

LOG

specifies to print REMOVE statement results in the SAS log.

LIST Statement

Lists the current working set of export mappings in the SAS log. The LIST statement name is optionally followed by the type of objects being listed. The object type can be DOMAIN, USER, or GROUP. The LIST statement has one option, VERBOSE.

Syntax

```
LIST <type> / <list-options>;
    <VERBOSE>
```

Optional Argument

VERBOSE
verbose output.

EXPORT Statement

Exports the working set of export mappings and clears the mapping tables, which are X.DOMAIN_MAP, X.USER_MAP and X.GROUP_MAP. EXPORT has three options, NOFORWARD, VERBOSE, and NOVERBOSE.

Syntax

```
EXPORT <export-options>;
    <NOFORWARD>
    <VERBOSE>
    <NOVERBOSE>
```

Optional Arguments

NOFORWARD

prevents forwarding of generated XML to the metadata server. When NOFORWARD is specified, the OUT= file will contain SAS Metadata Server input XML. Otherwise, it will contain output response XML.

VERBOSE

specifies to print generated input or output response XML to the SAS log. The VERBOSE option is ignored if the NOVERBOSE is also specified. The VERBOSE option is implied if the procedure's OUT= option is omitted because the log becomes the destination for generated or response XML.

NOVERBOSE

specifies to not print generated input or output response XML to the SAS log. The NOVERBOSE option overrides the VERBOSE option of the procedure and EXPORT statements. The NOVERBOSE option is ignored if the procedure's OUT= option is omitted.

Details

The EXPORT statement exports all export mappings and clears the mapping tables, which are X.DOMAIN_MAP, X.USER_MAP and X.GROUP_MAP.

Each new exported object and existing matched object is mapped in metadata using the ExternalIdentities association to an ExternalIdentity object with the following attributes:

- For new objects, ImportType='AuthenticationServer.Import'
- For matched or “tagged” objects, ImportType='AuthenticationServer.Match'
- Context='AuthenticationServer.ID'
- Name='AS:Server/server-name', where the server name consists of the fixed 'AS:Server/' prefix followed by the PUBLIC group identifier of the source DataFlux Authentication Server.

The export process creates mappings between source DataFlux Authentication Server objects and target SAS Metadata Server objects. Multiple DataFlux Authentication Server domains can map to the same SAS Metadata Server AuthenticationDomain object. Other object types map 1:1 in the two stores. However, exports from multiple DataFlux Authentication Server instances can also produce n:1 mappings. The Name attribute of the ExternalIdentity objects used in the mappings uniquely identifies the source DataFlux Authentication Server.

The EXPORT statement writes SAS Metadata Server output into the file specified by the OUT option or the SAS log if the VERBOSE procedure statement option is specified and the OUT= option is omitted. If the NOFORWARD option is specified, then the statement unconditionally writes input XML into the file specified by the OUT= option or the SAS log if OUT= is omitted. If the OUT= option is specified, then the XML is also written to the SAS log if the EXPORT statement's NOVERBOSE option is omitted and either the procedure's VERBOSE option or the EXPORT statement's VERBOSE option is specified.

UNDO Statement

Undoes changes to the working set of export mappings. These changes result from the most recent MATCH, MATCH SINGLETON, ADD, or REMOVE statement that was not followed by a RUN or EXPORT statement.

Syntax

UNDO;

Example: Exporting from a DataFlux Authentication Server to a SAS Metadata Server

Features: [PROC ASEXPORT statement](#)
 [MATCH SINGLETON statement](#)
 [MATCH statement](#)
 [ADD statement](#)
 [LIST statement](#)
 [EXPORT statement](#)

Details

This example demonstrates the following actions:

- specify metadata values
- create explicit singleton matches between these two domains
- auto-match domains by name
- add remaining unmatched domains
- perform explicit user matching
- auto-match users by FQLN
- add remaining unmatched users
- list everything for review
- create an input file (per noforward) for PROC METADATA that we can review

Assign a file reference. The FILENAME statement assigns a libref to an external SAS library that contains a permanent SAS catalog.

```
filename asx 'C:\TableServer\asexport.xml';
```

Specify metadata values.

```
proc ASEXPORT meta=
(
    user='username' password='password'
    server='localhost'
    port=port_number
    repos='repositoryID'
    filter=(DOMAINS  "*"
            USERS    "*"
            LOGINS   "Login[Domain/AuthenticationDomain
[@OutboundOnly='0']]")
)
as=
(
    server='localhost'
    user='username'
    pass='password'
```

```

        port=port_number
        filter=(DOMAINS "domain=(domain_names)"
              USERS    "enabled=TRUE subject=(ADMUSER,
Shared_Login_Manager, tsadm, 'USER%')")
              LOGINS   "(login IDs for included domains)")
    )
    verbose
    tracefile='C:\TableServer\asexport.croc' traceloc=SQL
    traceflags='319'
    retain
    out=asx
    ;

```

Create explicit singleton matches between these two domains.

```

    match singleton DOMAIN / criteria="as.domains.name_n='LOCAL' and
meta.domains.name_n='domain_name'" log;
    match singleton DOMAIN / criteria="as.domains.name_n='UNIX' and
meta.domains.name_n='domain_name'" log;

```

Auto-match domains by name.

```

    match DOMAINS / log;

```

Add remaining unmatched domains.

```

    add DOMAINS / log;

```

Perform explicit user matching. Attempt at least one user that has a matching Login. Nothing should match.

```

    match singleton USER / criteria="as.users.name_n='SHARED_LOGIN_MANAGER'
and meta.users.name_n='FEDERATION SERVER SHARED LOGIN MANAGER'" log;
    match singleton USER / criteria="as.users.name_n='USER1' and
meta.users.name_n='TSADM'" log;
    match singleton USER / criteria="as.users.name_n='TSADM' and
meta.users.name_n='TSADM'" log;

```

Auto-match users by FQLN.

```

    match USERS / log;

```

Add remaining unmatched users.

```

    add USERS / log;

```

List everything for review.

```

    list DOMAINS USERS;

```

Create an input file (per noforward) for proc METADATA that we can review.

```

    export / noforward noverbose;

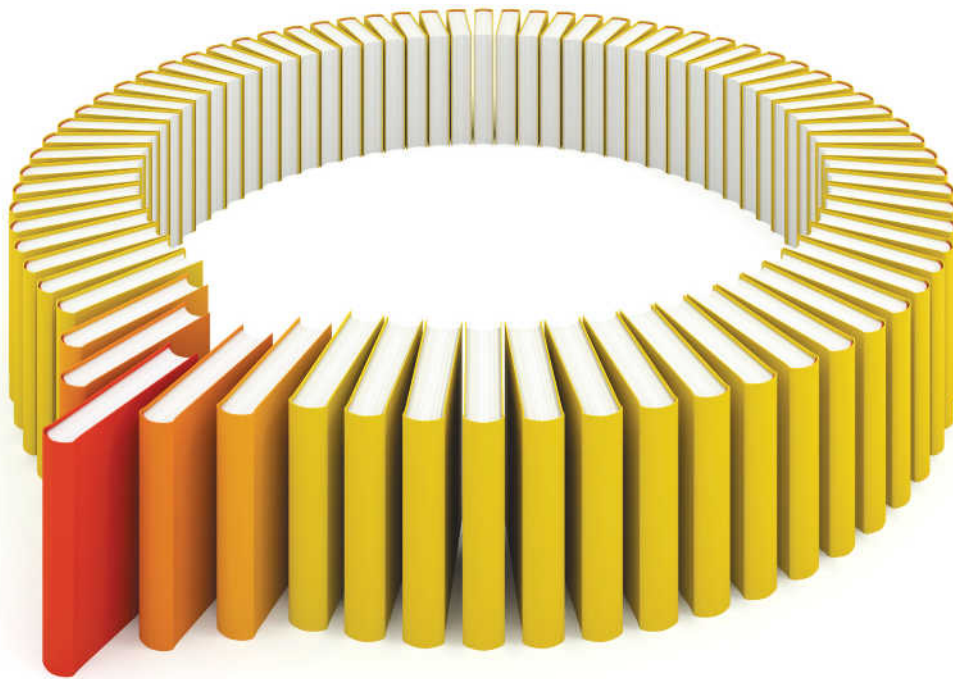
```

End processing of PROC ASEXPORT.

```

    quit;

```



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