



Lineage Pro - *User Guide*

Table of Contents

Opening the Application	3
Changing a user's Role	3
Groups.....	3
Filtering	4
Systems	4
Streams	5
New System	5
Datasets	6
New Dataset.....	6
Dataset Columns.....	8
Processes	10
New Process.....	10
Process Datasets	11
Column Lineages.....	12

Opening the Application

After installing the application from the Atlassian Marketplace.

1. Navigate to Atlassian Confluence site: <https://<your-site>.atlassian.net/wiki/home>
2. In the left panel select **Spaces**, then select your space name.
3. The space should open in the left panel. Look for **Space apps** section. The **Lineage Pro** application should appear under **Space apps**.
4. Select the **Lineage Pro** application. The application should open in the main content area to the right.

Changing a user's Role

To access certain application features, a user needs elevated privileges. To elevate a user's privileges, the application's administrator needs to change the user's Role. (The user that installed the application from Marketplace becomes the default application's **Administrator**)

To change a user's Role:

1. Go to **Admin** -> **Security**. The Security page opens.
2. In the Security page, look for the user's name.
3. To the right of the user's name, select the new **Role** from the dropdown.

Note: If a user's name **does not** appear in the Security page, the user does not have access to the Atlassian Confluence site or the Confluence Space. Contact your Atlassian Confluence site administrator to grant access to the user.

Groups

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

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

Lineage Pro (Staging)

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

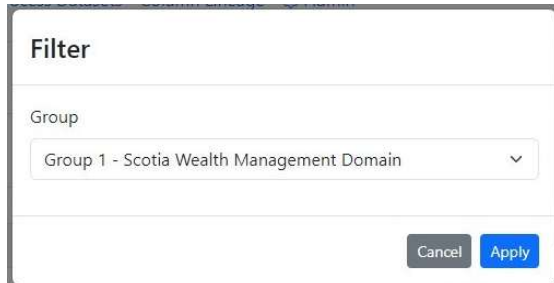
All Filter A			+ New B	
Code	Name	Date	...	
AK01	Ashmeet	9/23/2024 2:13:27 PM	...	
AK02	Ashmeet_testing September 23rd	9/24/2024 2:47:31 PM	...	
GRP1	Group 1	9/14/2024 9:28:53 PM	... C	
SK01	Sanchit	9/16/2024 3:57:24 PM	...	
Group 1	Scotia Wealth Management Domain	9/25/2024 6:30:19 PM	...	

Showing 5 rows

Filtering

The filtering operation will do two things.

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

A dialog box titled "Filter" with a "Group" dropdown menu showing "Group 1 - Scotia Wealth Management Domain". At the bottom are "Cancel" and "Apply" buttons.

Filter

Group

Group 1 - Scotia Wealth Management Domain

Cancel Apply

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

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

Systems

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

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

Actions

1. Click on **A** (see image below) to create a new Stream.

Lineage Pro (Staging)

A screenshot of the "Systems" tab in the Lineage Pro (Staging) interface. It shows a table with columns: Code, Name, Version, Stream, URI, Date, and an ellipsis menu. Two rows are visible, both for "Wealth Information Services & Products (WISP)". A red circle labeled "A" highlights the "+ New Stream" button in the top right corner of the table.

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

Group 1 Filter

Systems

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

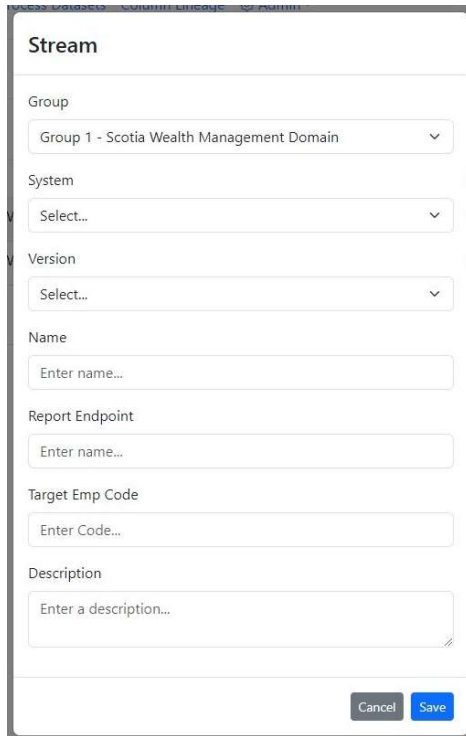
Showing 2 rows

+ New Stream + New System

Streams

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

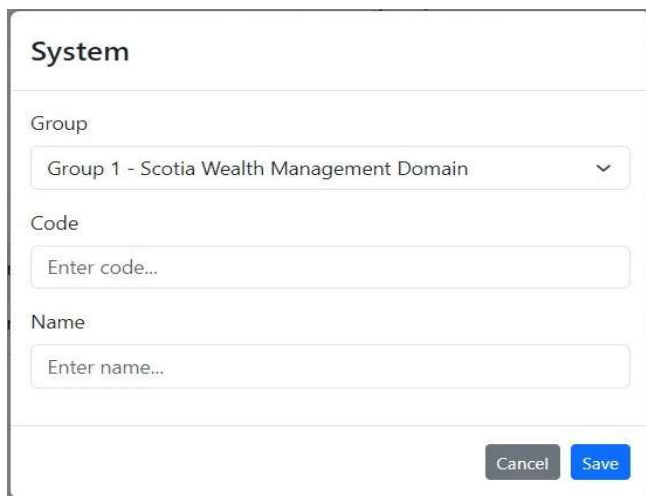
The following represents the interface for creating a new stream for the System.



The screenshot shows a web form titled "Stream". It contains several input fields and dropdown menus. The "Group" dropdown is set to "Group 1 - Scotia Wealth Management Domain". The "System" and "Version" dropdowns are set to "Select...". The "Name", "Report Endpoint", "Target Emp Code", and "Description" fields are empty text boxes with placeholder text "Enter name...", "Enter name...", "Enter Code...", and "Enter a description..." respectively. At the bottom right, there are "Cancel" and "Save" buttons.

New System

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



The screenshot shows a web form titled "System". It contains three input fields and one dropdown menu. The "Group" dropdown is set to "Group 1 - Scotia Wealth Management Domain". The "Code" and "Name" fields are empty text boxes with placeholder text "Enter code..." and "Enter name..." respectively. At the bottom right, there are "Cancel" and "Save" buttons.

Datasets

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

1. Click on **A** (see image below) to create a new Dataset

Lineage Pro (Staging)

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

Group 1 / B9M5 [Filter](#)

Datasets

A

+ New

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

New Dataset

The following screenshots represent the interface (see image below) for adding a new Dataset entry.

Dataset

Group	Group 1 - Scotia Wealth Management Domain		
System	B9M5 - Wealth Information Services & Products (WISP)		
Version	Select...		
Name	Enter name...		
Community	Enter community...		
Domain	Enter domain...		
Domain Type	Enter domain type...		
Asset Type	Select...		
Consumption Format	Select...		
Character Encoding	Enter encoding...		
Description	Enter a description...		
Country			
Origin	Filtered Criteria		
Enter origin...	Enter criteria...		
Historical Data			
Availability	Comments and Consideration		
Enter availability...	Enter comments...		
Store Type			
Name	Domain		
Enter name...	Enter domain...		
Asset Type	Domain Type		
Select...	Enter domain type...		
Community			
Enter community...			

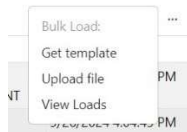
Dataset Columns

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

Actions

1. Clicking on ellipse (...) (see image below)

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



Lineage Pro (Staging)

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

Group 1 / B9M5 / v1 / WISP_TRANS.CLIENTACCOUNT [Filter](#)

Dataset Columns

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

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

Processes

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

Lineage Pro (Staging)

GroupsSystemsDatasetsDataset ColumnsProcessesProcess DatasetsColumn LineageAdmin

Group 1 / B9M5 / v1Filter

ProcessesNew

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

Showing 2 rows

New Process

ProcessesProcess DatasetsColumn LineageAdmin

Process

Group

Group 1 - Scotia Wealth Management Domain

System

B9M5 - Wealth Information Services & Products (WISP)

Version

1

Stream

Select...

Code

Enter code...

Name

Enter name...

Full Name

Enter full name...

Application Context

Enter app context...

Status

ts Generation[S

reserved.

Enter status...

Asset Type

Enter asset type...

Domain

Enter domain...

Target Load Frequency

Enter load frequency...

Community

Enter community...

CancelSave

Process Datasets

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

Lineage Pro (Staging)

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

Group 1 / B9M5 / v1

Filter

Process Datasets

+ New

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

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

Process Dataset

Process

Group: Group 1 - Scotia Wealth Management Domain

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

Version: 1

Stream: Select...

Process: Select...

Dataset

Target Dataset: Select...

Source Dataset: Select...

Description: Enter description...

Data Load Source: Enter data source...

Join Condition: Enter join condition...

Cancel Save

Column Lineages

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

Actions

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

Lineage Pro (Staging)

Groups Systems Datasets Dataset Columns Processes Process Datasets Column Lineage Admin

Group 1 / B9M5 / v1

Filter

Column Lineages



+ New

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

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

Column Lineage

Process

Group

Group 1 - Scotia Wealth Management Domain

System

B9M5 - Wealth Information Services & Products (WISP)

Version

1

Stream

Select...

Process

Select...

Process Datasets

Select...

Target

Column

Select...

Source

Column

Select...

Transformation

Rule

Enter rule...

Transformation

Rule

Enter rule...

Action

Enter action...

Cancel

Save