



Talend Open Studio for MDM Web User Interface

User Guide

5.2.1

Adapted for v5.2.1.

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Table of Contents

4.1.3. How to manage the log list display	46
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Preface	v
1. General information	v
1.1. Purpose	v
1.2. Audience	v
1.3. Typographical conventions	v
2. Feedback and Support	v
Chapter 1. Introducing Talend MDM	1
1.1. Introducing Master Data Management	2
1.2. Overview of Talend MDM	2
1.3. User interfaces for data governance.....	3
Chapter 2. Getting Started With the Web User Interface	5
2.1. Logging into the Web User Interface.....	6
2.2. Describing the Web User Interface.....	7
2.2.1. The web page and navigation principles	7
2.2.2. The Menu panel	9
2.2.3. The Web User Interface and the Studio	9
Chapter 3. Authoring and collaboration	11
3.1. Accessing data containers and data models	12
3.2. Browsing a single entity in a data container	12
3.2.1. How to search entities in the selected data container	13
3.2.2. How to export/import the search results	14
3.2.3. How to use the advanced search capabilities	18
3.2.4. How to save and reuse the search criteria	20
3.3. Managing records in an entity	21
3.3.1. How to open a data record in an entity	21
3.3.2. How to open a smart view of a data record in an entity	24
3.3.3. How to update a data record in an entity	26
3.3.4. How to provide localized versions of data in certain fields in your data records	30
3.3.5. How to add a new data record to an entity	31
3.3.6. How to add and modify images in a data record	34
3.3.7. How to delete a data record from an entity	35
3.3.8. How to recover a deleted data record	36
3.3.9. How to view the log file for a data record	37
3.4. Using inheritance and polymorphism.....	40
3.5. Running a Runnable Process designed in the Studio	40
3.6. Running a Standalone Process designed in the Studio	41
Chapter 4. Other management procedures	43
4.1. Viewing log files for all data records.....	44
4.1.1. How to search for specific logs	45
4.1.2. How to view the log details	46

Preface

1. General information

1.1. Purpose

This User Guide explains how to manage *Talend MDM Web User Interface* functions in a normal operational context.

Information presented in this document applies to release **5.2.1** of *Talend MDM Web User Interface*.

1.2. Audience



This guide is for data stewards and business users of *Talend MDM Web User Interface*.



The layout of GUI screens provided in this document may vary slightly from your actual GUI.

1.3. Typographical conventions

This guide uses the following typographical conventions:

- text in **bold**: window and dialog box buttons, field names, keyboard keys, menus and menu items,
- text in [**bold**]: titles of dialog boxes, wizard, windows and pages,
- text in `courier`: system parameters typed in by the user,
- text in *italics*: file, schema, column, row, variable names and text typed in by users,
- The  icon indicates an item that provides additional information about an important point. It is also used to add comments related to a table or a figure,
- The  icon indicates a message that gives information about the execution requirements or recommendation type. It is also used to refer to situations or information the end-user needs to be aware of or pay special attention to.

2. Feedback and Support

Your feedback is valuable. Do not hesitate to give your input, make suggestions or requests regarding this documentation or product and find support from the **Talend** team, on **Talend**'s Forum website at:

<http://talendforge.org/forum>



Chapter 1. Introducing Talend MDM

This chapter introduces Master Data Management as the means to manage shared data in an enterprise.

It gives an overview of Talend MDM, a model-driven solution introduced by **Talend**. Talend MDM has been specifically developed to address the challenges of governing, creating and managing master data for all types of organizations where data is hosted under various formats in various systems and can be extremely volatile.

1.1. Introducing Master Data Management

Most large enterprises have a heterogeneous application portfolio, with fragments of often inaccurate, incomplete and inconsistent data residing in various application. Companies wanting a consistent view of their customer base often struggle to reconcile data across numerous operational systems. These issues cause intelligent decision making to be difficult. The heart of these problems lies in the handling of shared data.

Master Data Management (MDM) is a comprehensive method of enabling an enterprise to link all of its critical data to one "master file" that provides a common point of interest. Examples of master data include customer, product, location, employee, organizational unit. Data that is not shared between functions within an organization is not master data.

MDM has emerged as a means to more efficiently manage shared data, eliminate redundancy, and create the "single version of the truth."

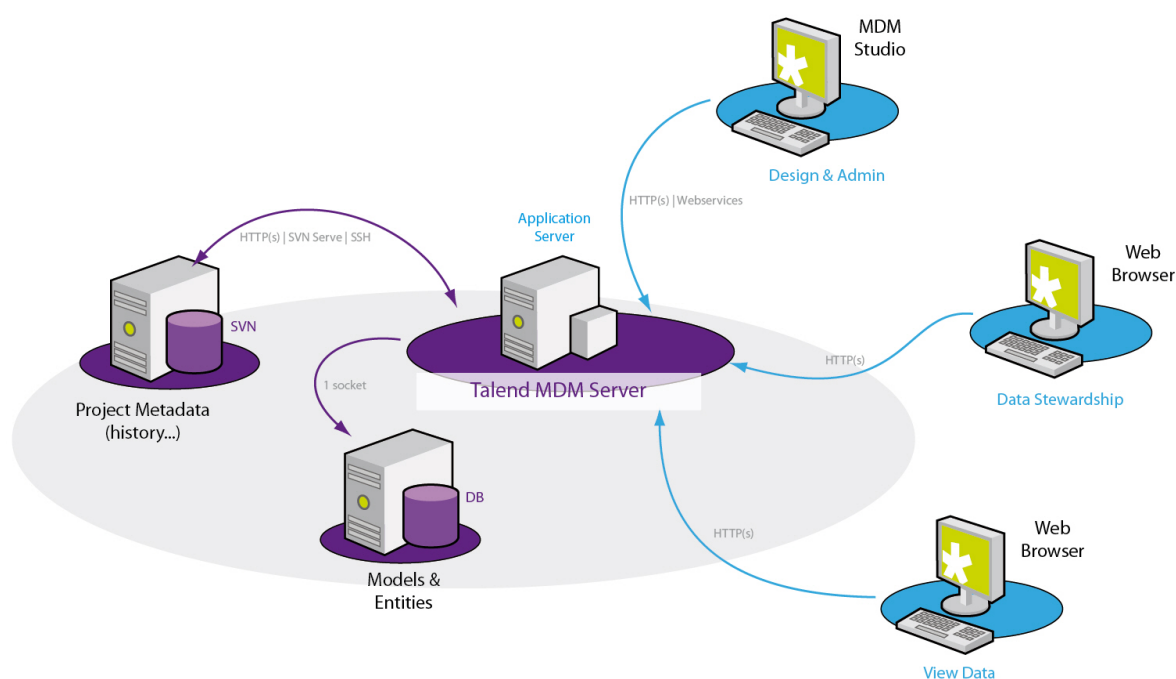
1.2. Overview of Talend MDM

Talend MDM has all the core features a user needs for an MDM application: advanced modeling, model-driven dynamic web interface, event triggering etc.

It is a model-driven solution easily adaptable to specific business needs and it is quick to implement. It provides a complete set of features for mastering, governing and integrating data throughout the enterprise.

Talend MDM groups all master data of the company in a central hub. This standardized repository provides, via the use of Data Models, the prerequisites against which data and updates are validated.

The chart below illustrates the main building blocks of Talend MDM.



The list below describes the main building blocks of Talend MDM:

- **MDM Studio** - where administrators can set up and operate a centralized master data repository. They can build data models that employ the necessary business and data rules to create a single master copy of the master data. This master data will be propagated back to target and source systems.

- MDM Hub - where the master data is stored.
- MDM Repository - where a working copy of the data is stored before deployment to the MDM Server. The MDM Repository can be stored locally, on the same machine as the MDM Studio, or remotely, based on an SVN server.
- The web-based interface - where business users and data stewards can search, display or edit master data handled by the MDM Studio.



Building blocks available to your use differ depending on the MDM edition you have.

1.3. User interfaces for data governance

Talend MDM provides the processing layers that ensure the right people have the right tools to centrally model and manipulate master data. This key capability comprises the relevant features involved in master data governance and stewardship.

Data governance is the process of defining the rules that master data has to follow. Data stewardship is the process of making sure that the data follows those rules. This means that it is necessary to have both a governance function, to demonstrate that the right controls are in place, and a stewardship function, to ensure that the controls are enforced.

In Talend MDM, master data governance and stewardship processes are available through two different user interfaces. The first is an administration tool called *Talend Open Studio for MDM*. The second is a web-based interface called *Talend MDM Web User Interface*.

Users of *Talend Open Studio for MDM* can set the governance rules. For more information about available administration tasks, see *Talend Open Studio for MDM Administrator Guide*.

Users of *Talend MDM Web User Interface*, can carry out any manual intervention necessary to make sure that the master data is clean, consistent, and accurate. For more information, see [chapter Authoring and collaboration](#).



Chapter 2. Getting Started With the Web User Interface

This chapter introduces *Talend MDM Web User Interface*. It provides a short description of the Web User Interface and guides you through the basics for accessing it.

2.1. Logging into the Web User Interface

Talend MDM Web User Interface is a web-based application that enables the business user or the data steward to view, retrieve and manipulate master data stored in the central XML repository.

Before logging on to *Talend MDM Web User Interface*, check that the following have been carried out:

- The MDM server is up and running,
- The web server URL has been provided to you by the MDM administrator allowing you to open the server authentication page,
- Either a login and password have been provided to you by the MDM administrator or a manager has allowed you access to *Talend MDM Web User Interface*. The default user authentication information is `user/user`.
- You have an Internet browser such as Internet Explorer or Mozilla Firefox, for example. Chrome is not supported for the time being.

To log in to *Talend MDM Web User Interface*, do the following:

1. Open your web browser.
2. Enter the web server URL in the web browser and then click ➔ to open the authentication page of *Talend MDM Web User Interface*.

The web server address is structured as follows:

```
-http://[server address]:8180/talendmdm/secure/
-http://localhost:8180/talendmdm/secure/
```


A diagram of a login form enclosed in a dashed green border. It contains three elements: a "Login:" label followed by a text input field containing the word "administrator"; a "Password:" label followed by a password input field represented by a series of black dots; and a "Login" button at the bottom.

3. On the authentication page, enter your login and password in the corresponding fields.



The default administrator authentication information is `administrator/administrator`, and the default user authentication information is `user/user`.

4. Click **Login**.

Your web browser opens on the selected master data Version with a welcome page.

The welcome page provides you with direct links to getting started pages in the Web user interface such as **[Data Browser]** and **[Journal]**.



Here, you can view, retrieve and manage master data in the selected master data Version. You can also carry out some management procedures using the different options in the **Menu** panel.

For detailed information about master data management procedures from *Talend MDM Web User Interface*, see [chapter *Authoring and collaboration*](#), [chapter *Other management procedures*](#).

2.2. Describing the Web User Interface

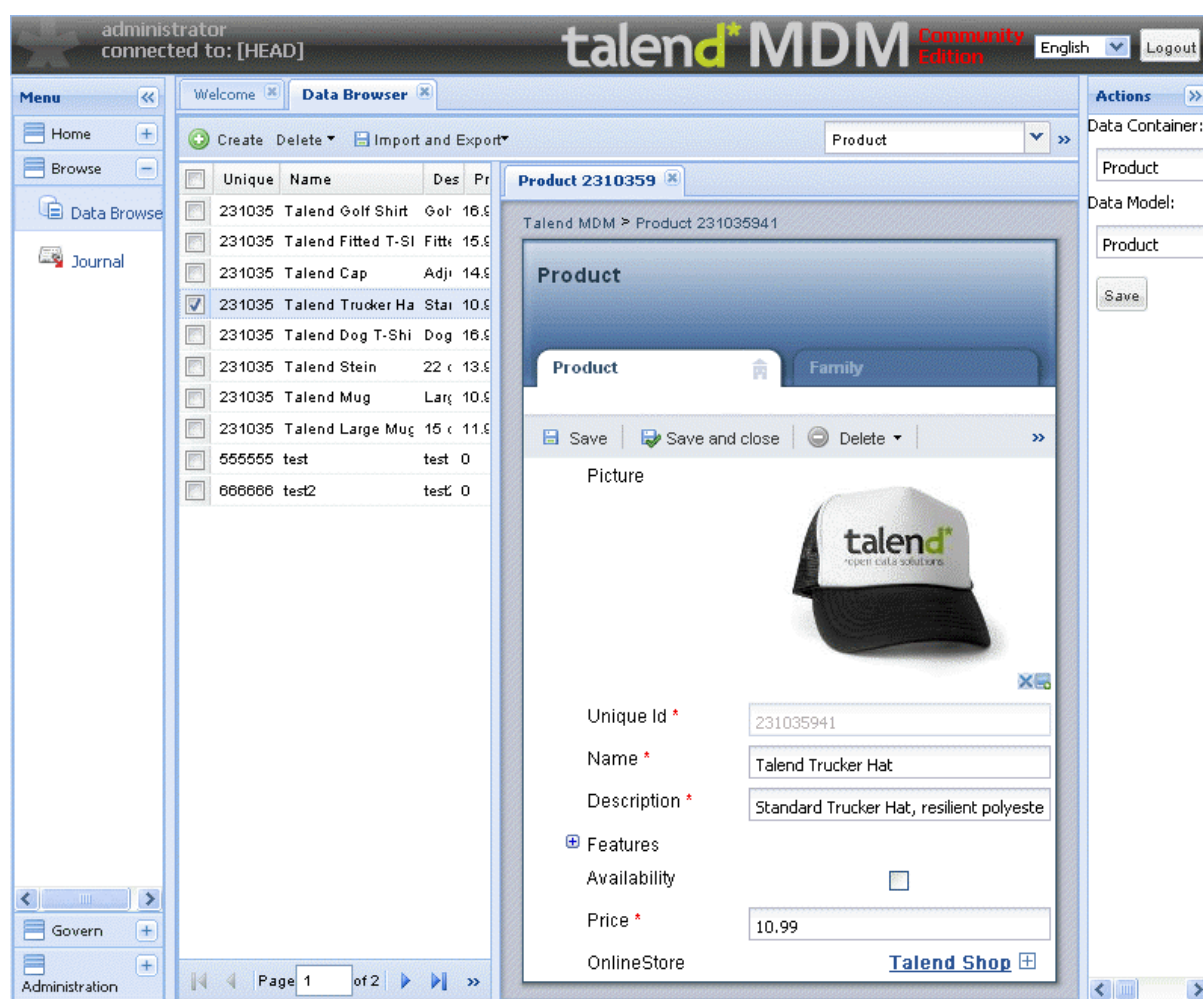
Talend MDM Web User Interface is the interface for searching, displaying or editing master data handled by the MDM Studio.

Users of the *Talend MDM Web User Interface* can carry out any manual intervention necessary to make sure that the master data is clean, consistent, and accurate.

2.2.1. The web page and navigation principles

The *Talend MDM Web User Interface* web page is divided into:



- a banner on top of the page which indicates the Talend MDM edition you are connecting to. A logout button and a language list are also displayed.
- a collapsible panel on the right which lists the data containers and data models created in *Talend Open Studio for MDM*.
- a collapsible panel on the left which lists the menu items.
- a workspace in the center where you can open different pages and carry out the manual intervention necessary to make sure that the master data is clean, consistent, and accurate.



From the **Actions** panel to the right, you can select the data container and data model you want to access. All viewable items or data records pertain to both a data container and a data model. For more information, see [section Accessing data containers and data models](#).

From the **Menu** panel to the left, you can click any of the tabs to display the list of items grouped under the tab. Then you can click any of the listed menu items to open a corresponding page. For more information, see [section The Menu panel](#).

The table below describes the available buttons and management options in the **Menu** panel, banner and **Actions** panel of *Talend MDM Web User Interface*.

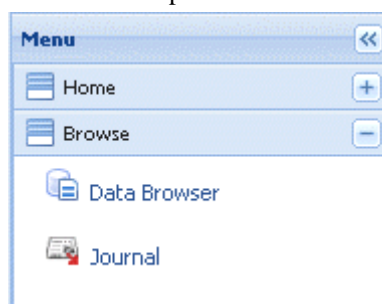
Tab	Item	Description
Home	Welcome	Provides you with direct links to getting started pages in the Web user interface such as Data Browser and Journal .
	Recycle bin	Contains items which have been deleted using the Logical delete button at the bottom of the [Data Browser] page. For further information, see section How to delete a data record from an entity .
Browse	Data Browser	Allows users to search, add or edit items or data records in the data container selected. For further information, see section Browsing a single entity in a data container .
	Journal	Lists all logs on accessible entities.
Banner		Closes the current page and goes back to the authentication page of <i>Talend MDM Web User Interface</i> .
		Lists the languages in which you can display <i>Talend MDM Web User Interface</i> .

Tab	Item	Description
Actions	Data Container	Lists the data containers which the user has the appropriate authorization to access. For further information, see section Accessing data containers and data models .
	Data Model	Lists the data models which the user has the appropriate authorization to access. For more information, see section Accessing data containers and data models .
	» and «	Shows or hides the Actions and Menu panels.
	Save	Saves the selected data container and data model.

2.2.2. The Menu panel

The **Menu** panel on the left hand side of the web page allows you to execute various tasks on master data pertaining to the selected data container.

The figure below illustrates an example of the **Menu** panel of the *Talend MDM Web User Interface*.



You can click any of the tabs in the **Menu** panel to display the list of options grouped under the tab.

You can show or hide the **Menu** panel by clicking the » and « buttons located in the upper right corner of the panel. For detailed information on the management options listed in the **Menu** panel, see [chapter Authoring and collaboration](#), [chapter Other management procedures](#).

2.2.3. The Web User Interface and the Studio

Talend MDM Web User Interface provides the processing layer to search, display or edit master data. However, all tasks that a business user or a data steward can do through the Web User Interface are defined within *Talend Open Studio for MDM*.

Users of *Talend Open Studio for MDM* can set the governance rules that will dictate who can read, create, update, and delete data; which validity models are required for data; and which recovery provisions are required, to name a few. For further information about available administration tasks, see the *Talend Open Studio for MDM Administrator Guide*.

Users of the *Talend MDM Web User Interface* can carry out any manual intervention necessary to make sure that the master data is clean, consistent, and accurate. For more information on the tasks a business user can do from the Web User Interface, see [chapter Authoring and collaboration](#), [chapter Other management procedures](#).



Chapter 3. Authoring and collaboration

While *Talend Open Studio for MDM* is the tool which centrally defines models for the master data, *Talend MDM Web User Interface* is the tool which validates actual data against these models. It is the responsibility of the data steward or business user to make sure that the master data follows the governance rules defined in the Studio.

This chapter provides the information a data steward or a business user needs to manage master data assets in order to improve their reusability, accessibility, and quality.

3.1. Accessing data containers and data models

Before you can query, extract and edit master data, you must specify:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

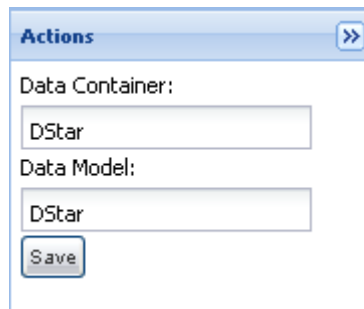
For further information on data containers and data models, see the *Talend Open Studio for MDM Administrator Guide*.

A collapsible **Actions** panel on the right hand side of the Web User Interface allows you to select a data container and a data model. Once the data container and the data model are selected in the Web User Interface, any creation or modification of master data will update the selected container.

Prerequisite(s): The MDM server is already launched. You have your authentication information to log in to *Talend MDM Web User Interface*.

To select a data container and a data model to access, complete the following:

1. Log in to the Web User Interface.
2. In the upper right corner of the web page, click on the << button to show the **Actions** panel.



3. From the **Data Container** list, select the required data container.
4. From the **Data Model** list, select the required data model.
5. Click on the **Save** button to save your selection.

You can now access the information pertaining to the selected data container using the **Menu** panel on the left hand side of the page. Any modification of master data will be validated against the selected data model; For further information on the menu options, see the following sections.

3.2. Browsing a single entity in a data container

In *Talend MDM Web User Interface*, the **Data Browser** menu allows you to search data records pertaining to a specific entity in the data container selected. You can also save and reuse your search criteria.

3.2.1. How to search entities in the selected data container

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



Make sure that you have selected:

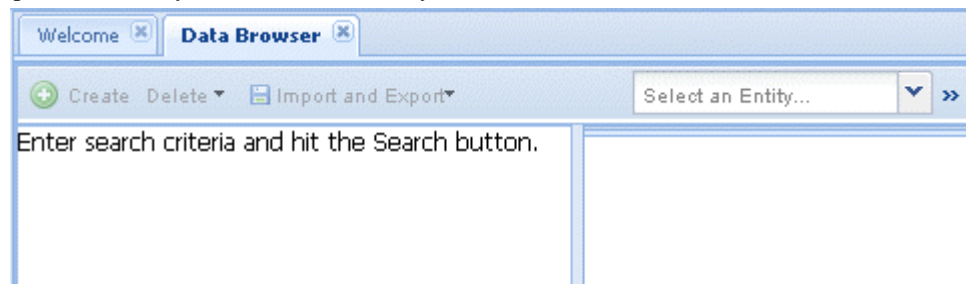
- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

For further information, see [section Accessing data containers and data models](#).

To search for data records in a specific entity, complete the following:

1. From the **Welcome** page, click **Data Browser** , or
2. From the **Menu** pane, click **Browse** and then select **Data Browser**.

A page opens, in which you can select the entity of interest.



3. In the entity field, click the arrow, and then select from the list the entity of interest.


The first page of records is returned as soon as you select the entity.

4. If required, limit the results by using the search criteria options, and then clicking **Search**.



The available search criteria depend on the parameters set in *Talend Open Studio for MDM* when creating a view for the entity. For more information, see the *Talend Open Studio for MDM Administrator Guide*.

Note also that, if you are using a SQL database, you cannot combine a full-text query with other search criteria.

5. If you have already bookmarked your search criteria, select  from the list to the right, select a search bookmark and then click **Search**. For further information, see [section How to save and reuse the search criteria](#).
6. Consider, for example, searching the *Agent* entity for all data records in which the commission code is equal to “3”:

After setting the entity name in the first field, click the arrow in the second field and select *Commission Code*.

In the drop-down list immediately to the right, click the arrow and select a search option, **is equal to** in this example.

In the next field, select 3.

Click on **Search** to display all agent whose commission code is equal to “3”.

Identifier	Firstname	Lastname	Commission Code	Start Date
LarWi	Larry	Wilson	3	2006-06-03
ChrHo	Chris	Hoove	1	200
JimW	Jim	Walke	3	200
CinJo	Cind	Johns	3	200
RobQ	Robe	Quinc	3	200
TheCl	Thec	Clinto	1	200
AdrMc	Adriz	McKin	2	200
TedH	Ted	Harris	2	200
HarPi	Harry	Pierce	1	200
ChrPi	Chris	Pierce	4	200

The first record is automatically selected in the list and its detail are listed in the panel to the right.



If one or more foreign keys have been defined to link the selected entity to other entities in the data model, tabs representing these foreign keys will display in the detail view to show the entities linked together.

- Click on any of the listed records to open its detail in the right panel, or right click the record and then select **Open Item In New Tab** to open the record in its own top-level tab.
- If required, set in the **Lines/page** box at the bottom of the page a number for the data records you want to display.

This number will be retained every time you try to browse data records in the XML repository (MDM hub).



If a smart view has already been created for the business entity in *Talend Open Studio for MDM*, the **[Data Browser]** page will open on this customized view and not on the usual generated view. For further information on how to open a smart view, see [section How to open a smart view of a data record in an entity](#). For further information on smart views, see the *Talend Open Studio for MDM Administrator Guide*.

3.2.2. How to export/import the search results

After setting your search criteria and launching your search for data records pertaining to a specific entity, you can export your search results in an xls or csv file. This could be very interesting if you have some kind of mass update on a group of records. You search for the records, export the search results, do your updates in the file and finally import the records into MDM again.

3.2.2.1. How to export data records

You can copy data records that are the results of specific search criteria from the MDM server to your computer. This enables you to work with a local copy of the data records, do any modifications and then import the records again onto the MDM server for example.

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

For further information, see [section Accessing data containers and data models](#).

To export all the records result of your search criteria, complete the following:

1. Follow the steps outlined in [section How to search entities in the selected data container](#) or [section How to use the advanced search capabilities](#) to list the data records according to a specific search criteria.

Identifie	Firstnam	Lastnam	Commission	Start da	Terminat
JenEi	Jen	Ei	3	2006-05	
LarWi	Larry	Wilson	3	2006-06	
JimWa	Jimmy	Walker	3	2005-10	
JenGa	Jennifer	Garfield	3	2006-06	
CinJo	Cindy	Johnson	3	2005-10	
RobQu	Robert	Quincy	3	2006-06	
WarRo	Warren	Roosevelt	3	2005-10	
ThoRo	Thomas	Roosevelt	3	2006-04	
EdwMo	Edwin	Monroe	3	2005-10	
LynCo	Lyndon	Coolidge	3	2005-10	

Talend MDM » Agent » ThoRo

D* Agent

Agent Agency

Save Delete Duplicate Journal

Picture (optional)

Identifier * ThoRo

Firstname * Thomas

Lastname * Roosevelt

Commission Code * 3

Start date * 2006-04-08

Termination Date

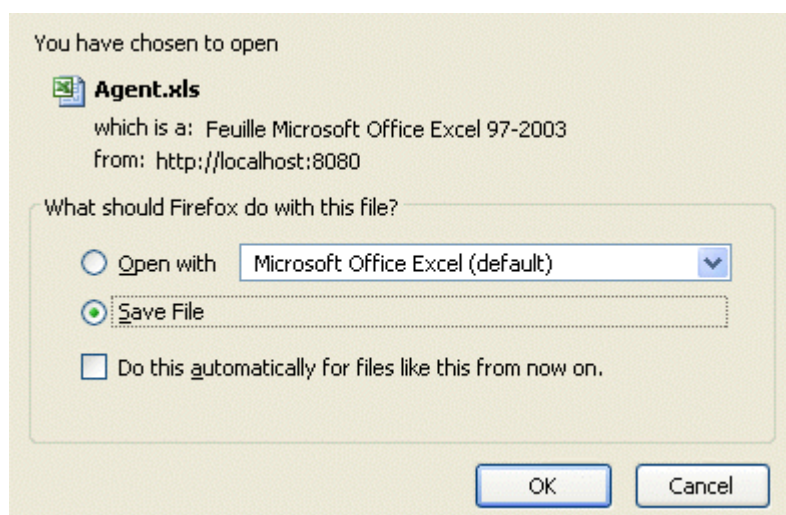
Status approved

2. Click **Import and Export** on the menu bar to open a list.

3. Select **Export** to open a dialog box.



The steps to follow are different according to your operating system. Follow the instructions in the dialog box that opens in order to complete the export operation.



4. Select the **Save File** option and then click **OK** to close the dialog box. The listed records are all copied from the MDM server to your computer in an xls file.

you can now do necessary modifications on the records and then import them on the MDM server as outlined in [section *How to import data records*](#) .

3.2.2.2. How to import data records

You can import data records from a local xls or csv file on the MDM server. Usually, these records are those that are exported from the MDM server to a local copy to do some mass modifications as outlined in [section *How to export data records*](#) .

Prerequisite(s):

-The MDM server is already launched.

-The data records have been already copied from the server to a local copy on your computer. For further information, see [section *How to export data records*](#).



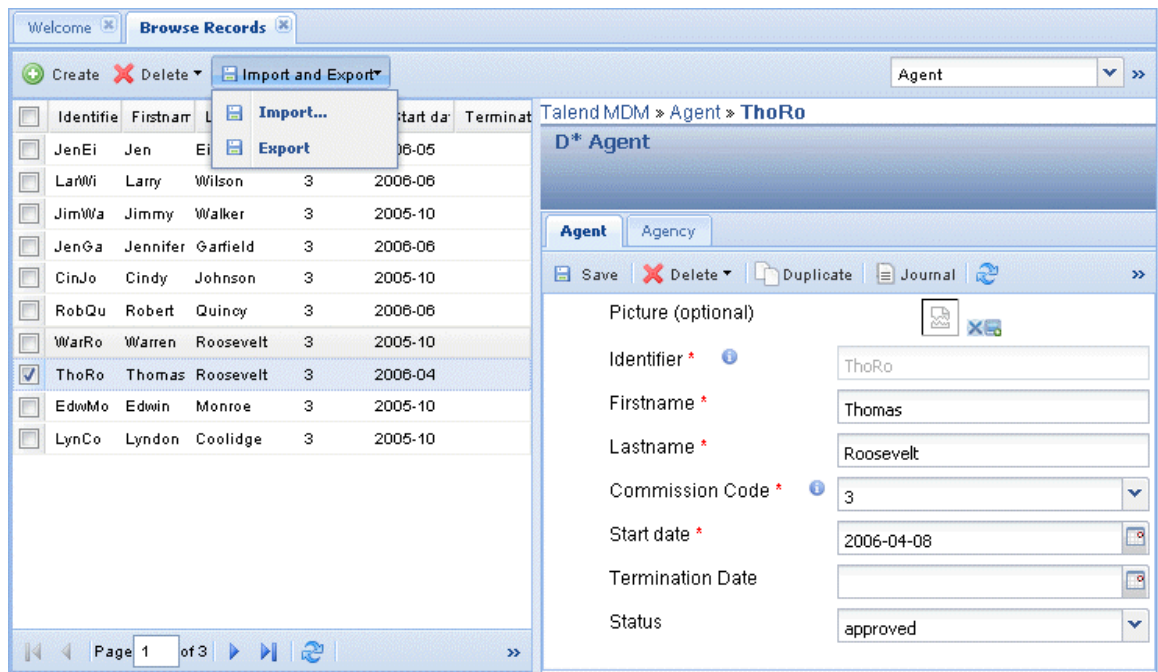
Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

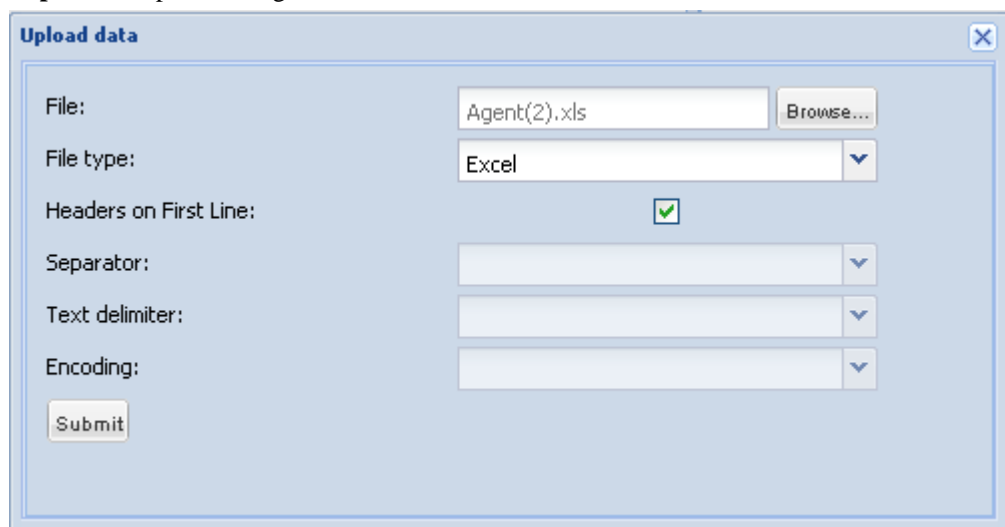
For further information, see [section *Accessing data containers and data models*](#).

To import data records from a local file onto the MDM server, complete the following:

1. Open the **[Data Browser]** page in *Talend MDM Web User Interface*.
2. Select the entity in which you want to import the data records, and then click the **Search** button to list all the records in the selected entity.



- Click **Import and Export** on the menu bar to open a list.
- Select **Import...** to open a dialog box.



- Click the **Browse...** button and follow the instruction in the open dialog box to upload the file that holds the data records.
- From the **File type** list, select the type of the file you want to import, **Excel** or **CSV**.
- Click **Submit**. A progress information bar displays followed by a confirmation message.



The import operation may take some time depending on how many records you have in the local file.

- Click **OK** to close the confirmation message. All data records in the local file are imported on the MDM server.

3.2.3. How to use the advanced search capabilities

Talend MDM Web User Interface provides you with advanced search capabilities. You can construct search expression by chaining complex statements graphically. Additionally, these advanced searches can be saved or “bookmarked”.

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

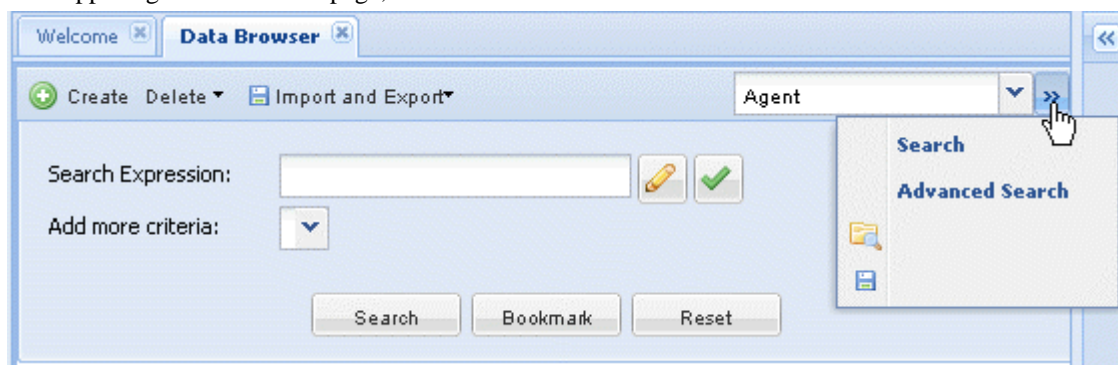
For further information, see [section Accessing data containers and data models](#).


To search for data records using expressions, complete the following:

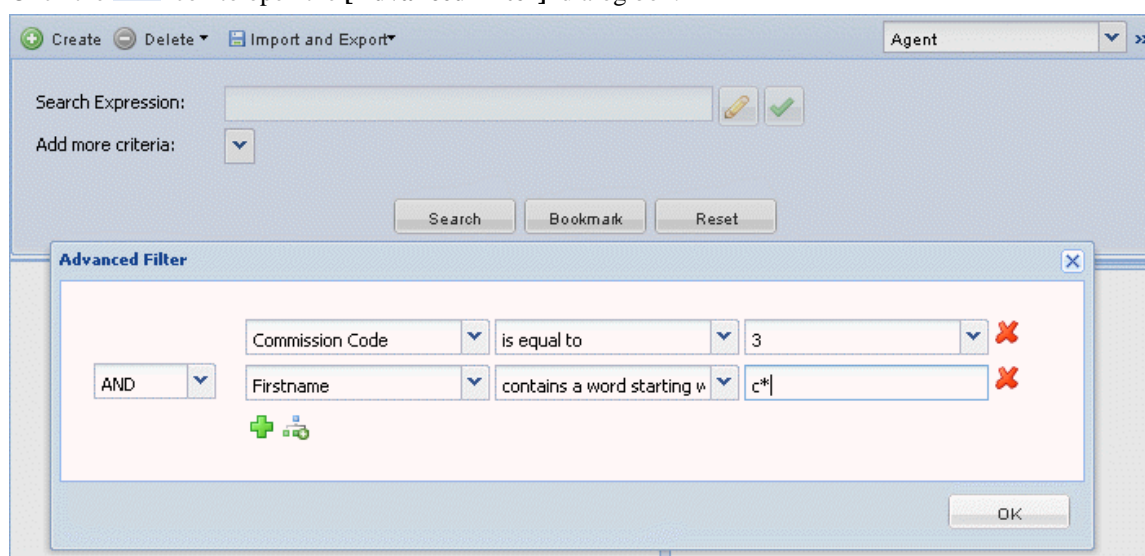
1. Click on **Data Browser** in the **Menu** panel to open the page in which you can select the entity of interest..

In the entity field, click the arrow, and then select from the list the entity you want to search for data records.

In the upper right corner of the page, select **Advanced Search** to show the advanced search view.



2. Click the  icon to open the [Advanced Filter] dialog box.



- Construct the search expression using the drop-down lists.
- Use the plus button to add as many statements to the expression selecting as well a logical operator from the list.
- If required, click Add more criteria to filter your search using the date.
- Click **Ok** to close the **[Advanced Filter]** dialog box.

The expression you built graphically is displayed in the **Search Expression** field.

Search Expression: ((Agent/CommissionCode EQUALS 3) AND (Agent/Firstname STARTSWITH c*))

Add more criteria:

Search Bookmark Reset

- If required, click the icon to check if your expression is valid.
- Click on **Bookmark** if you want to save your search criteria for later use. For further information, see [section How to save and reuse the search criteria](#).
- Click on **Search** to display all agent whose commission code is equal to “3” and whose first name starts with “c”.

Iden	Firstname	Last	Commi	Stat	Termin
<input checked="" type="checkbox"/>	CinJ	Cindy	Joh 3	200	
<input type="checkbox"/>	CalC	Calvin	Clin 3	200	
<input type="checkbox"/>	Che	Chester	Eise 3	200	

Agent CinJo

Talend MDM > D* Agent CinJo

D* Agent

Save Save and close Delete Duplicate

Picture (optional)

Identifier * CinJo

Firstname * Cindy

Lastname * Johnson

Commission Code * 3

Start date * 2005-10-30

Termination Date

Status approved

Page 1 of 1

The first record is automatically selected in the list and its detail are listed in the panel to the right.

- Click on any of the listed records to open its detail.



The number of the records displayed in the page depends on what you have already defined in the **Lines/page** box in a previous search. Change the number in the box according to your needs and then restart your advanced search to display the desired number of records in the page. This number will be retained every time you try to browse data records in the XML repository (MDM hub).

3.2.4. How to save and reuse the search criteria

In order not to set your search criteria over and over again when you are browsing data records in a specific entity, *Talend MDM Web User Interface* enables you to save your search criteria for later use.

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



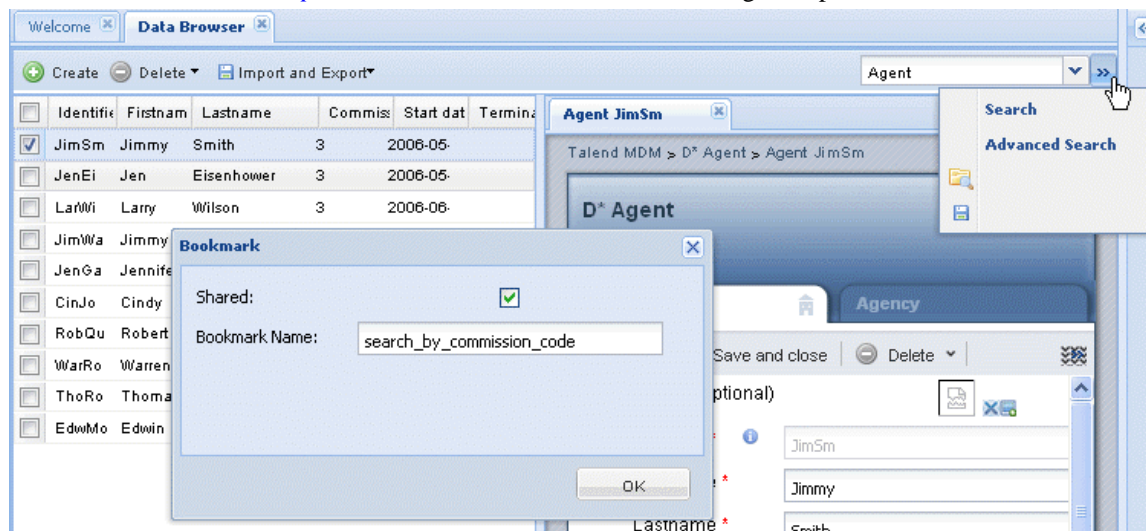
Make sure that you have selected:


- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

For further information, see [section Accessing data containers and data models](#).

To save your search criteria, complete the following:

1. Follow the steps outlined in [section How to search entities in the selected data container](#) or [section How to use the advanced search capabilities](#) to list the data records according to a specific search criteria.




2. Click on the  icon in the upper right corner of the page to open a dialog box.
3. Select the **Shared** check box if you want to share this bookmark with other business users.
4. In the **Bookmark Name** field, enter a name for your search criteria and then click **Ok** to close the dialog box.

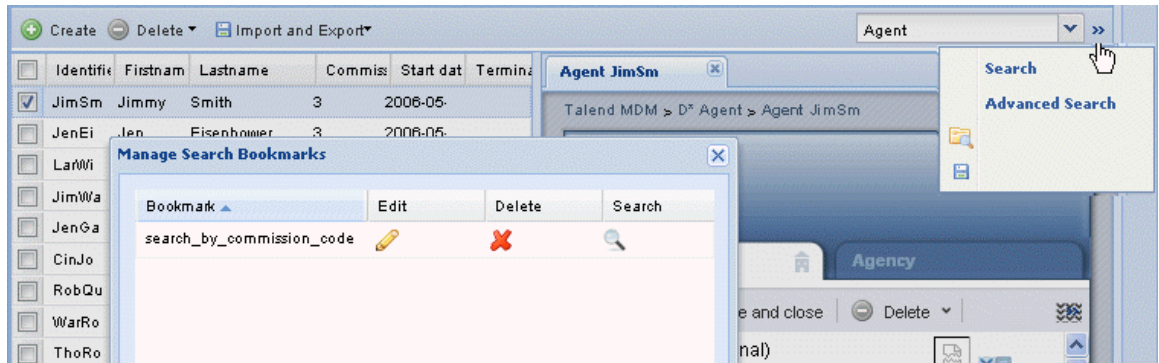
A confirmation message displays.

5. Click **OK** to close the message.

The current search criteria name is listed in a search bookmark list.

To reuse a search criteria you already defined, complete the following:

1. Click on the  icon in the upper right corner of the page to open the search bookmark list.






This list includes all search bookmarks created by different business users.

2. Select from the list the search bookmark according to which you want to display data records and then click



The number of the records displayed in the page depends on what you have already defined in the **Lines/page** box in a previous search. Change the number in the box according to your needs and then reselect your search criteria to display the desired numbers of records. This number will be retained every time you try to browse data records in the XML repository (MDM hub).

In the search bookmark list:

Click	To...
	open a dialog box where you can edit the search bookmark
	delete the search bookmark
	search the data records according to the search criteria set in the selected bookmark

3.3. Managing records in an entity

In *Talend MDM Web User Interface*, the **Data Browser** menu allows you to author/manage data records pertaining to a specific entity in the selected data container.

3.3.1. How to open a data record in an entity

From *Talend MDM Web User Interface*, you can search and open a generated view of data records pertaining to a specific entity in a specific data container.

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



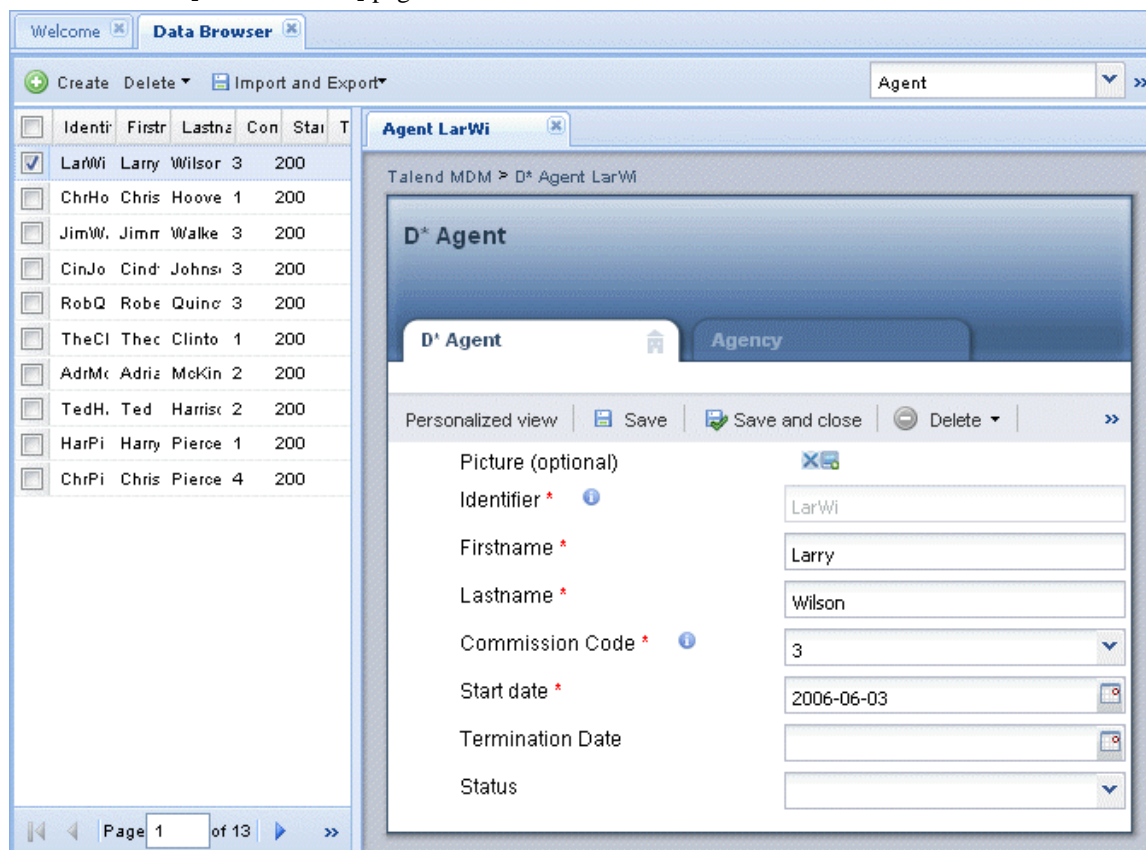
Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

For further information, see [section Accessing data containers and data models](#).

To open a generated view of a data record pertaining to a specific entity, complete the following:

1. Follow the steps outlined in [section How to search entities in the selected data container](#) to list the records of interest in the **[Data Browser]** page.

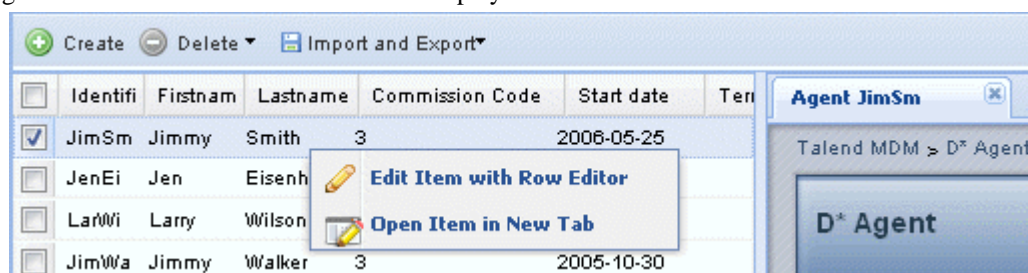


This page always opens on the data record list pertaining to a specific entity. The first record in the list is selected by default and its details show in the panel to the right.



The number of the records displayed in the page depends on what you have already defined in the **Lines/page** box in a previous search. Change the number in the box according to your needs and then restart your advanced search to display the desired number of records in the page. This number will be retained every time you try to browse data records in the XML repository (MDM hub).

2. Either, click on a specific data record in the record list to open its detail in the pane to the right,
3. Or, right-click the record in the record list to display a contextual menu.



4. From the contextual menu, select:

Option	To...
Edit item with row editor	update the record through a row editor. For further information on editing data records, see section How to update a data record in an entity .
Open item in new tab	open the record details in a new view.

All viewable attributes pertaining to the data record appear in the panel to the right.

The screenshot shows the 'D* Agent' form in the Talend MDM interface. The form is titled 'D* Agent' and has a sub-tab 'Agency'. It contains several input fields and a toolbar with actions like 'Save', 'Save and close', 'Delete', 'Duplicate', 'Journal', and a refresh icon. The fields are as follows:

Field Name	Value
Picture (optional)	[Icon]
Identifier *	LarWi
Firstname *	Larry
Lastname *	Wilson
Commission Code *	3
Start date *	2006-06-03
Termination Date	[Empty]
Status	approved



If a foreign key has been defined to link the selected entity to another entity in the data model, two tabs will display in the detail view to represent the two entities linked together.






If a smart view has already been created in *Talend Open Studio for MDM* for the business entity that holds the record, the **[Data Browser]** page will open on this customized view and not on the usual generated view. For further information on how to open a smart view, see [section How to open a smart view of a data record in an entity](#). For further information on smart views, see the *Talend Open Studio for MDM Administrator Guide*.


These attributes differ according to what has been defined in the Studio when defining the data model. For further information, see the *Talend Open Studio for MDM Administrator Guide*.

Read-only attributes are displayed in grey color, while writable attributes are displayed in white color. Many management operations are accessible through the different tabs in this generated form of the data record. The table below explains these operations.

Icon/Character	Function
	Uploads a picture for the data record.
	Removes the picture from the data record.
	Displays an information tooltip for the related attribute.
*	Indicates a mandatory attribute.
	Manages relationships (foreign key) between entities: displays a list of available foreign keys for the relationship.

Icon/Character	Function
	Manages relationships (foreign key) between entities: creates a new record for the relationship.
	Manages relationships (foreign key) between entities: removes the foreign key from the field.
	Manages relationships (foreign key) between entities: opens the related record in a new page.

The following options are available on the view toolbar:

Click	To...
Save	save any modifications you may do on the record detail.
Save and close	save any modifications you may do on the record detail and close the record.
Delete	delete the record permanently or only erase it from the data record list. For further information, see section How to delete a data record from an entity .
Duplicate	open an exact copy of the record in a new page. Then you can use this copy as a base to create a new record in order not to create one from scratch, for example. For further information on adding new data records, see section How to add a new data record to an entity .
Journal	open a page that lists all logs on the selected data record. For further information, see section Viewing log files for all data records .
	refresh the page display.
The drop-down arrow	display a list of all the runnable processes created in the MDM Studio on the selected entity. From this list, you can run any of the listed processes to carry out a specific task on master data. For further information, see section Running a Runnable Process designed in the Studio .

3.3.2. How to open a smart view of a data record in an entity

A smart view is an alternative to the “conventional” generated view used to display the detail of a data record in *Talend MDM Web User Interface*. It is a customized, business-oriented view that renders an HTML presentation of the details of a data record held in a specific entity. Smart views are created in the MDM Studio; for further information, see the *Talend Open Studio for MDM Administrator Guide*.

Whenever you try to browse a data record in a specific entity, Talend MDM checks for a smart view for such entity. If it finds the smart view, it uses this view to render the HTML presentation of the record detail instead of displaying the “conventional” generated form. You can then switch back and forth between the smart view and the generated form.

Prerequisite(s):

-The MDM server is already launched.

-At least one smart view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.

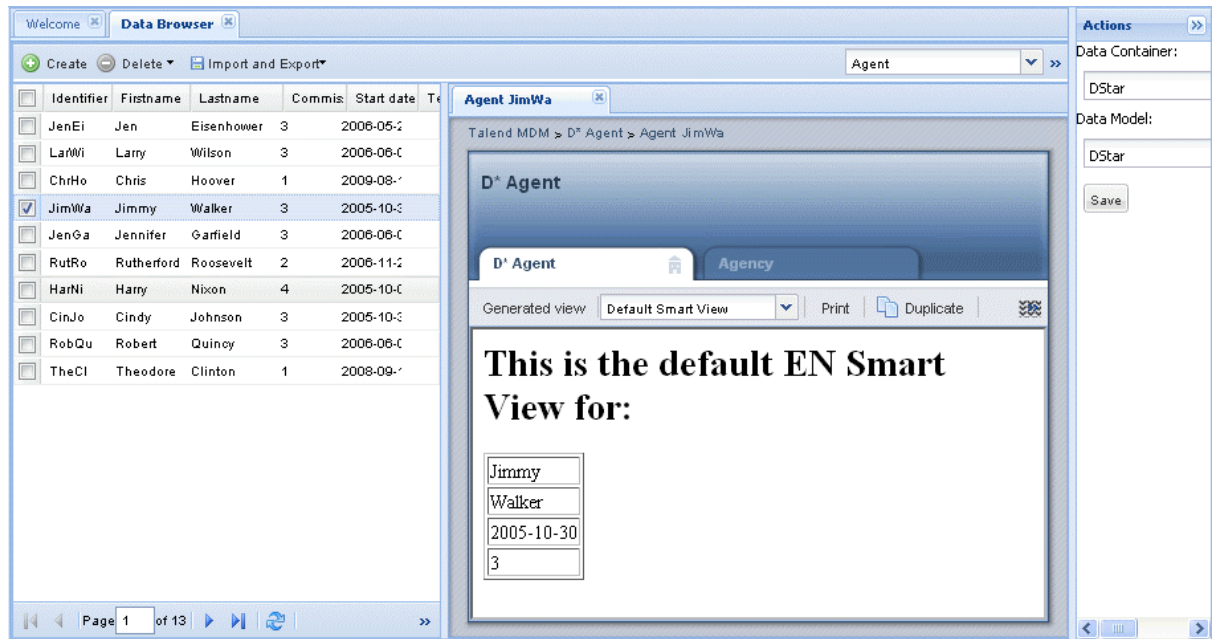


Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

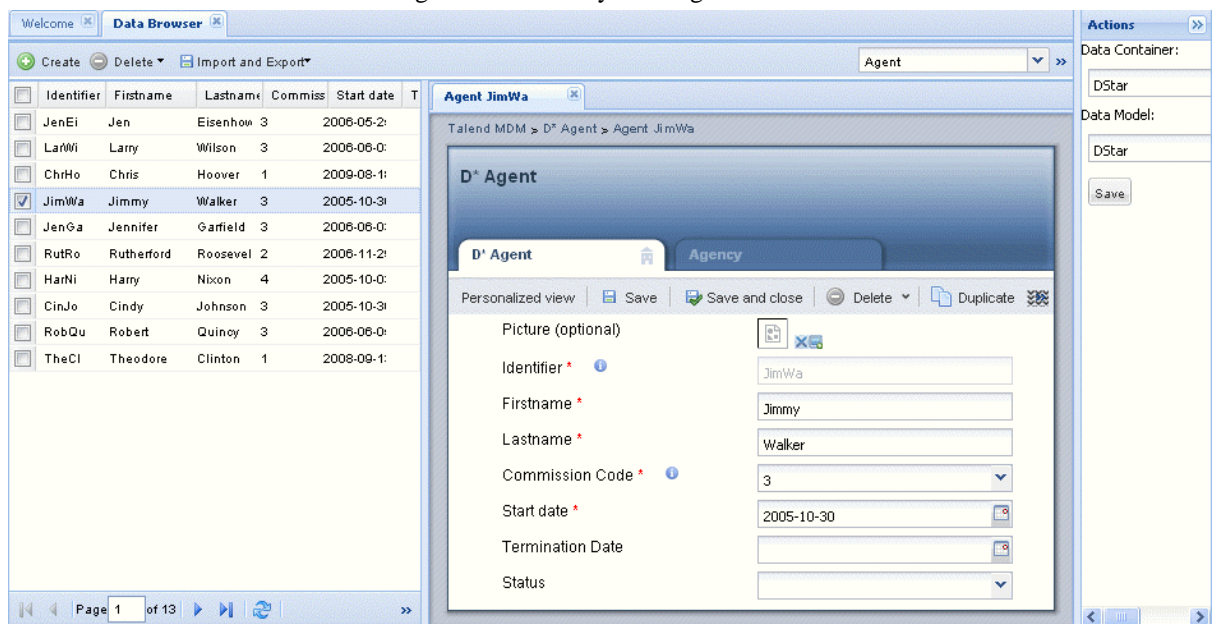
For further information, see [section Accessing data containers and data models](#).

Follow the steps outlined in [section How to search entities in the selected data container](#) to open a smart view.




The **[Data Browser]** page opens to list the data records pertaining to the selected entity in the selected data container. The record details open in a smart view (HTML representation) in the panel to the right.

You can switch to the “conventional” generated form by clicking the **Generated view** tab:



The following options are available on the toolbar:

Click	To...
Generated view	switch back to the generated view of the record detail. You can switch back and forth between the generated view and the smart view using the Generated view and Personalized view bars respectively.
Drop-down arrow	display a list of all the smart views created in the MDM Studio on the selected entity. From this list, you can select the smart view you want to open in the [Data Browser] page. For further information on smart views, see the <i>Talend Open Studio for MDM Administrator Guide</i> .
Print	print the record detail to a file.
Duplicate	open an exact copy of the record in a new page. Then you can use this copy as a base to create a new record in order not to create one from scratch, for example. For further information on adding new data records, see section How to add a new data record to an entity .

Click	To...
Journal	open a page that lists all logs on the selected data record. For further information, see section Viewing log files for all data records .
	refresh the page display.
Drop-down arrow	display a list of all the runnable processes created in the MDM Studio on the selected entity. From this list, you can run any of the listed processes to carry out a specific task on master data. For further information, see section Running a Runnable Process designed in the Studio .

3.3.3. How to update a data record in an entity

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

For further information, see [section Accessing data containers and data models](#).

1. Follow the steps outlined in [section How to search entities in the selected data container](#) to list the records of interest in the **[Data Browser]** page.

The screenshot displays the Talend MDM Data Browser interface. On the left, a table lists agents with columns: Identifier, Firstname, Lastname, Commission Code, Start date, Termination Date, and Status. The first record, 'LarWi', is selected. On the right, a detailed view for 'D* Agent LarWi' is shown, featuring a 'Personalized view' tab and a 'Save' button. The form includes fields for Identifier (LarWi), Firstname (Larry), Lastname (Wilson), Commission Code (3), Start date (2006-06-03), Termination Date, and Status.

The page always opens on the entity list where the first record in the list is selected by default and its details show in the panel to the right.



The number of the records displayed in the page depends on what you have already defined in the **Lines/page** box in a previous search. Change the number in the box according to your needs and then restart your advanced search to display the desired number of records in the page. This number will be retained every time you try to browse data records in the XML repository (MDM hub).

2. In the record list, click on the data record you want to update.

All the viewable attributes pertaining to the data record appear in the panel to the right:

The screenshot shows the 'D* Agent' record detail form in Talend MDM. The form is titled 'D* Agent' and has a sub-header 'Agency'. Below the header is a toolbar with buttons: Save, Save and close, Delete, Duplicate, Journal, and a refresh icon. The form contains several input fields and dropdowns:

- Picture (optional): A small image icon.
- Identifier *: A text field containing 'LarWi'.
- Firstname *: A text field containing 'Larry'.
- Lastname *: A text field containing 'Wilson'.
- Commission Code *: A dropdown menu showing '3'.
- Start date *: A date field showing '2006-06-03'.
- Termination Date: An empty date field.
- Status: A dropdown menu showing 'approved'.



If a smart view Process has been created for the business entity holding the record, the record detail will open in an HTML representation. For further information, see [section How to open a data record in an entity](#).

3. Edit any of the modifiable attributes according to your needs .

You can also update a record through a row editor if you right-click it in the record list and select **Edit Item with Row Editor**.

The screenshot shows a table of records in Talend MDM. The table has columns: Identifi, Firstnam, Lastname, Commission Code, Start date, and Termination Date. The first row is selected. A right-click context menu is open over the first row, showing two options: 'Edit Item with Row Editor' and 'Open Item in New Tab'.

	Identifi	Firstnam	Lastname	Commission Code	Start date	Termination Date
<input checked="" type="checkbox"/>	JimSm	Jimmy	Smith	3	2006-05-25	
<input type="checkbox"/>	JenEi	Jen	Eisenh			
<input type="checkbox"/>	LarWi	Larry	Wilson			
<input type="checkbox"/>	JimWa	Jimmy	Walker	3	2005-10-30	

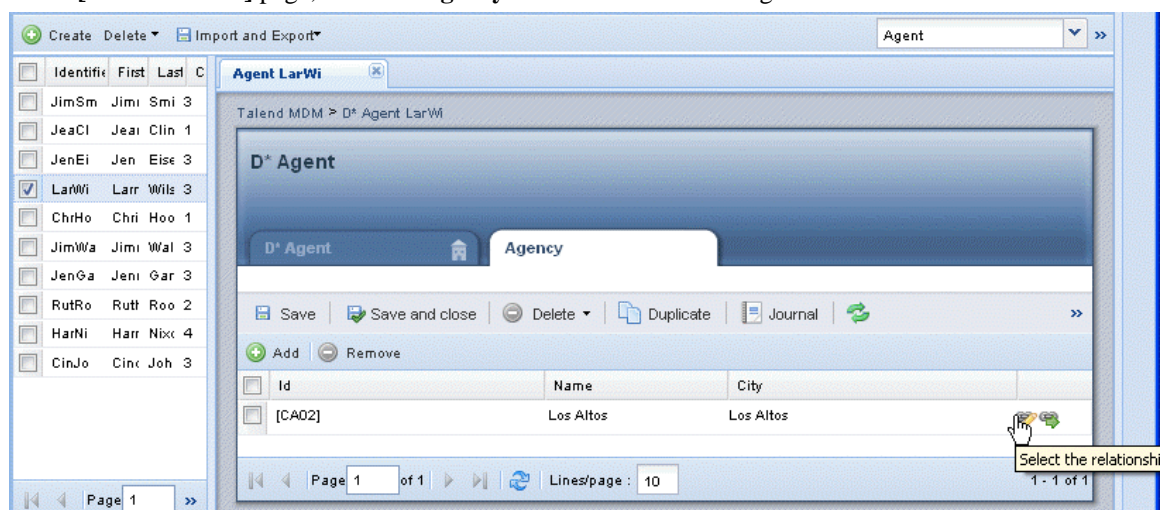



If you try to update a data record that has been modified by somebody else after you have retrieved it from the database, a warning message displays to warn you that saving your modifications will overwrite the other user's changes.

4. If required, click any of the tabs that represent foreign key relationships to open the corresponding view and modify the relationship directly from there.

Consider, for example, that you want to update the agency to which the agent is attached through a foreign key. In this example, a foreign key has been defined in *Talend Open Studio for MDM* to link the **Agent** and **Agency** entities together. In such a case, two tabs display in the detail panel to the right.

5. In the **[Data Browser]** page, click the **Agency** tab in the view to the right.



6. In this view, click on , and then double-click the agency/city combination in the open dialog box.

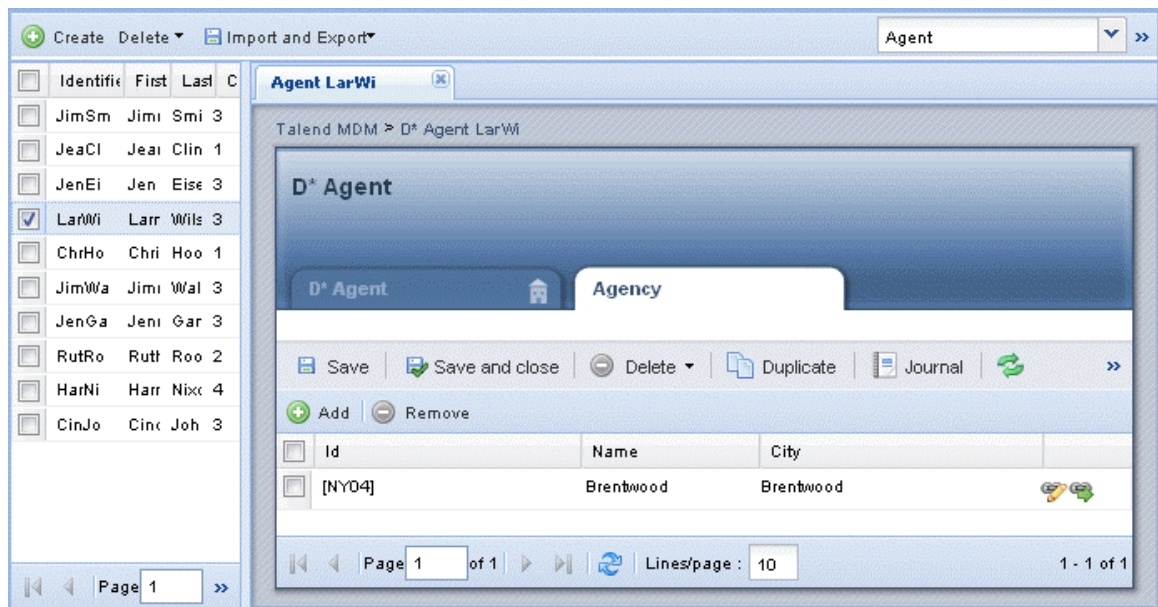


If the **Set the Foreign Key Info** annotation is added to the specified attribute in *Talend Open Studio for MDM* when defining the data model, items will be ordered alphabetically in the open foreign key list. If not, items will be ordered by creation date. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



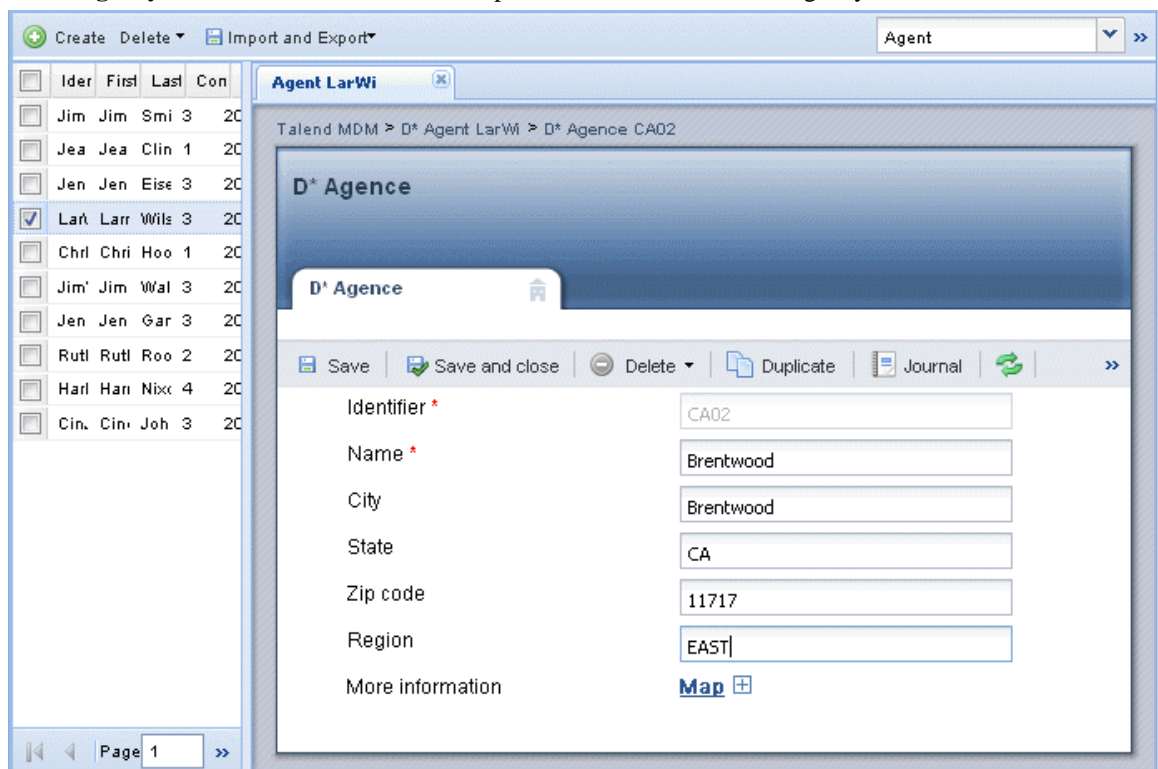
If the **Set the foreign key filter** annotation is added to the specified attribute in *Talend Open Studio for MDM* when defining the corresponding data model, you can filter the foreign key values displayed in the list. For further information, see the *Talend Open Studio for MDM Administrator Guide*.

The dialog box closes and the **Agency** field is updated with the selected foreign key.



The related agency (foreign key) information in the selected data record has been modified accordingly.

7. In the **Agency** view, click on the  icon to open the detail of the related agency.



8. If required, edit any of the modifiable attributes from this view.
9. Click **Save** or **Save and close**.
10. Click any of the breadcrumbs that appear horizontally across the top of the view to open the record details or any of the foreign key details.



If you click **Duplicate** on the toolbar, a new data record is created which is identical to the open one except for the ID value. You can make modifications to the listed attributes and save these modifications to create a new data record. For further information on how to create a new data record, see [section How to add a new data record to an entity](#).

3.3.4. How to provide localized versions of data in certain fields in your data records

In the **[Data Browser]** page, you can customize how *Talend MDM Web User Interface* displays the data in certain fields in your data records depending on the user locale, for example to provide localized text for different languages.


Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.

-An MDM administrator has made the element localizable when creating the data model. For further information, see the *Talend Open Studio for MDM Administrator Guide*.


To provide a localized version of a field in a data record, do the following:

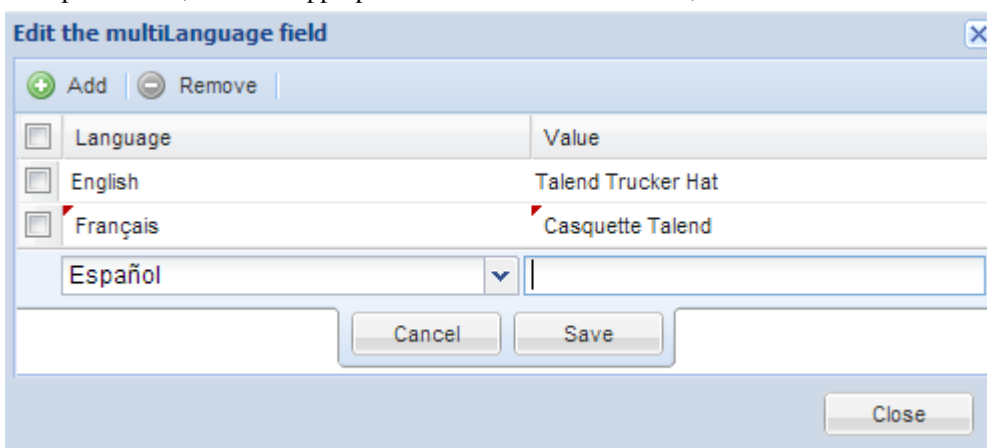
1. Follow the steps outlined in [section How to search entities in the selected data container](#) to list the records of interest in the **[Data Browser]** page.
2. Open the data record for which you want to localize a field.
3. All fields that you can localize are indicated by an **Edit the multiLanguage field** button . Click this button for the field you want to localize.

The **[Edit the multiLanguage field]** dialog box opens.



If you simply enter your text in the appropriate field and save the record, this provides a localized version for your current locale without you having to open the **[Edit the multiLanguage field]** dialog box.

4. Click the **Add** button  **Add** to add a new language instance for the field in question, select the language from the drop-down list, enter the appropriate text in the **Value** column, and then click **Save**.



Language	Value
<input type="checkbox"/> English	Talend Trucker Hat
<input type="checkbox"/> Français	Casquette Talend
<input type="checkbox"/> Español	

5. Add as many language instances as you require, and then click **Close**.

You can test your changes by changing the locale in the top-right corner of the screen.

3.3.5. How to add a new data record to an entity

In the **[Data Browser]** page, you can add new data records to the selected entity. The data records you add are validated against the data model you select before browsing the entity. For more information, see [section Accessing data containers and data models](#).

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



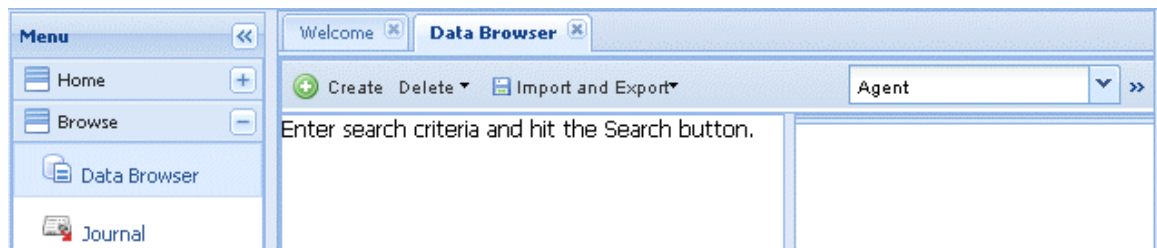
Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

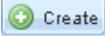
For further information, see [section Accessing data containers and data models](#).

To add a data record in an entity, complete the following:

1. In the **Menu** panel, click on **Data Browser** to open the **[Data Browser]** page.




2. In the entity field, click the arrow and then select from the list the entity to which you want to add a data record.


Click on the  **Create** tab in the upper left corner to open a new page.

Now you can add a new data record to the *Agent* list, *Janet Richardson* for example.



When you start filling in the fields in the page, obligatory fields display in red. You will not be able to save the new record before you fill in all these fields.


3. If required, use the  icon and browse on your workstation to upload a picture for the new agent.
4. Type *JanRi* in the **Identifier** field.

Put your pointer on  to see the description of the identifier.

In the **Firstname** field, enter the agent first name, *Janet* in this example.

In the **Lastname** field, enter the agent last name, *Richardson* in this example.

From the **Commission Code** list, select the commission code for this agent.

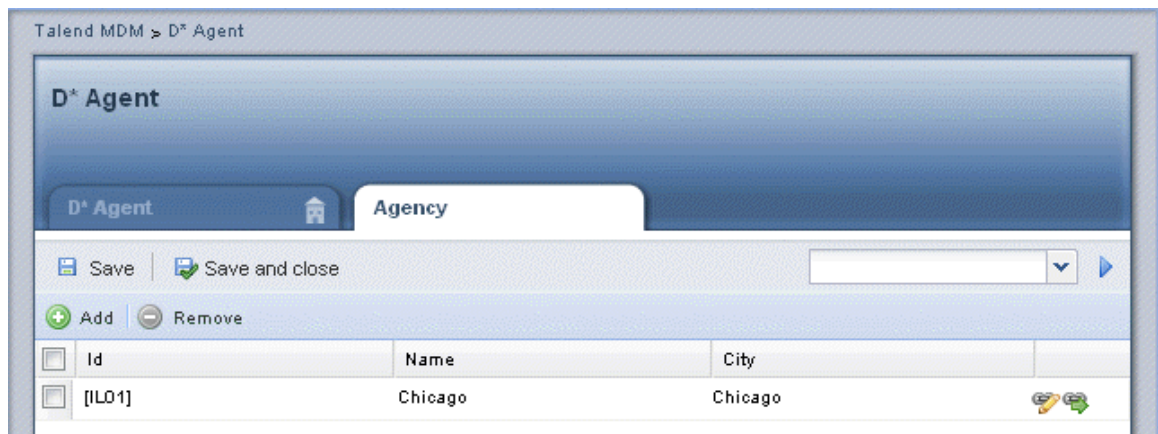
Put your pointer on  to see a description of the commission code that may help you to decide what commission code to give to the agent. This is a kind of a business rule against which you validate the agent commission code. For further information, see the *Talend Open Studio for MDM Administrator Guide*.


Click the calendar next to the **Start Date** field and select a start date for the agent.

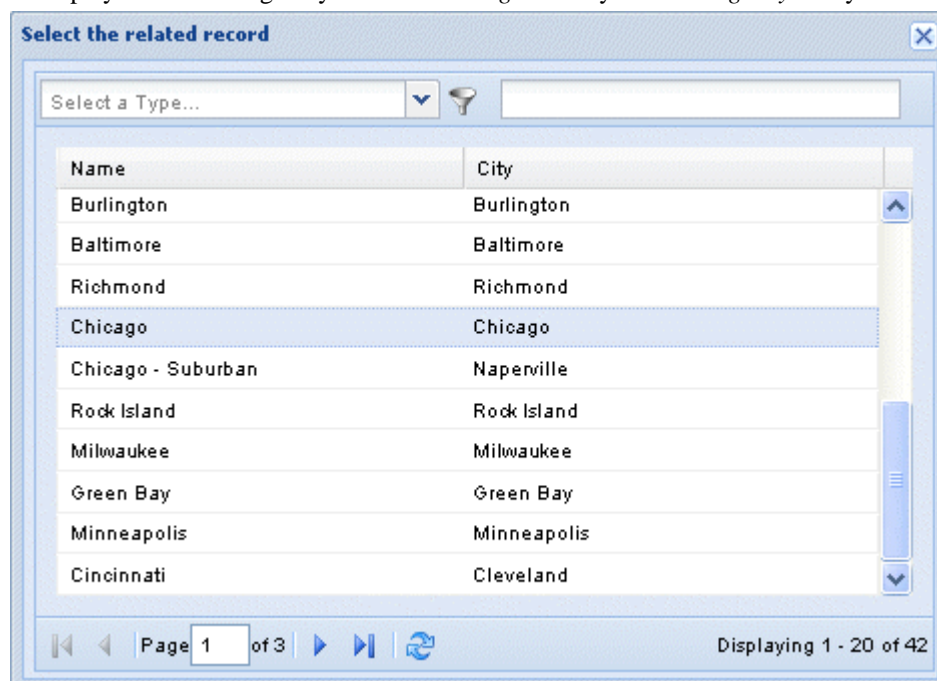
If required, click the calendar next to the **Termination date** field and select an end date for the agent.

From the **Status** list, select a status for the agent from the enumeration list.

5. Click the **Agency** tab to open the corresponding view where you can set the foreign key information and link the record to a specific agency.



6. Click  to display a list of foreign keys that link the *Agent* entity with the *Agency* entity.



Such a list displays if foreign keys and foreign keys information have been defined in the *Agent* entity through *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



If the **Set the foreign key filter** annotation is added to the specified attribute in *Talend Open Studio for MDM* when defining the corresponding data model, you can filter the foreign key values displayed in the list. For further information, see the *Talend Open Studio for MDM Administrator Guide*.

7. Double-click the agency to which you want to attach this agent.

The dialog box closes and the information of the selected agency displays in the **Agency** panel.

The screenshot shows the 'D* Agent' web interface. At the top, there's a header with 'D* Agent' and 'Agency'. Below the header, there's a navigation bar with 'D* Agent' and 'Agency' tabs. The main area contains a form with the following fields:

- Picture (optional)**: A button with a picture icon and a close icon.
- Identifier ***: A text field containing 'JanRi'.
- Firstname ***: A text field containing 'Janet'.
- Lastname ***: A text field containing 'Richardson'.
- Commission Code ***: A dropdown menu with '2' selected.
- Start date ***: A date field containing '2011-11-14'.
- Termination Date**: A date field.
- Status**: A dropdown menu with 'pending' selected.

At the top of the form, there are buttons for 'Save' and 'Save and close'.

8. Click on **Save** or **Save and Close**. The data record list now includes *Janet Richardson*.




If you get an error message upon saving the record, this could mean that the validation process of the data record fails. This validation process is carried out by a **Before-Saving** process created in the Studio. For further information on the **Before-Saving** processes, check the *Talend Open Studio for MDM Administrator Guide*.

3.3.6. How to add and modify images in a data record

Your data record may contain images. These images are stored on the server in a Catalog.

To upload a new picture to the Catalog:

1. In the Data Browser, open the data record for which you want to upload a new picture.
2. Click the  icon to open the **[Select Picture]** dialog box.
3. In the **Upload From Local** tab, click the **Browse** button, and browse your local file system to find the image file you want to upload.
4. In the **Image Catalog** field, specify the name of the Catalog in which you want to store your picture.
Catalogs are like virtual folders and help you find your pictures more easily.
5. In the **Image Id** field, either select the default name proposed or replace it with a new name of your choice.
6. Click **Upload** to upload your new picture to the server.

To select an existing picture from the Catalog:

1. In the Data Browser, open the data record for which you want to select a new picture.
2. Click the  icon to open the **[Select Picture]** dialog box.

3. In the **Select From Server** tab, double-click the picture you want to use. The **[Select Picture]** dialog box closes and the new picture is added to your data record.

If you have a large number of pictures in your Catalog, you can use the search box to reduce the number of images displayed.

3.3.7. How to delete a data record from an entity

You can either permanently delete data records from the selected entity or erase them from the data record list, which allows you to recover them at a later date.

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

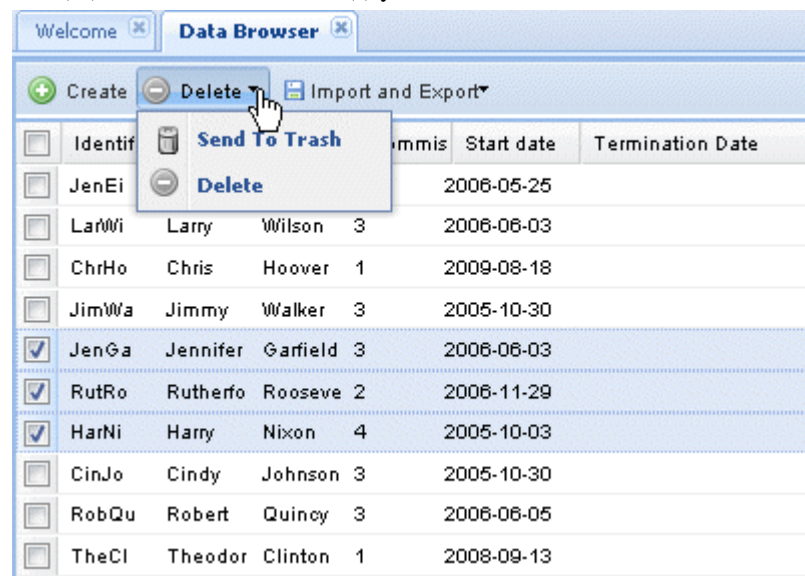
For further information, see [section Accessing data containers and data models](#).

To delete a data record permanently, complete the following:

1. In the **[Data Browser]** page, search for the data records pertaining to the entity of interest.

All searched data records are listed in this page. For more information, see [section How to search entities in the selected data container](#).

2. Select the check box(es) next to the data record(s) you want to delete.



3. Click the **Delete** tab and then select **Delete** to permanently delete the data record(s).

A confirmation message displays.



The **Delete** button removes data permanently. In case of doubt, use the **Send to Trash** option.

- Click on **Yes** to confirm the deletion and close the message.

The selected data record(s) is/are deleted from the list and from the XML repository.

To erase a data record from the record list, complete the following:

- In the **[Data Browser]** page, search for the data records pertaining to the entity of interest.

All searched data records are listed in this page. For more information, see [section How to search entities in the selected data container](#).

- Select the check box(es) next to the data record(s) you want to remove from the list.

- Click the  tab and select **Send to Trash** to remove the data record(s) from the list.

A dialog box displays asking for the path to delete data records.

- Click on **OK** to close the dialog box.

The selected data records are erased from the data record list. Recovery copies are stored in the **Recycle Bin**. For more information on recovering deleted data records, see [section How to recover a deleted data record](#).

3.3.8. How to recover a deleted data record

In the recycle bin you can view data records which have been deleted using the **Send to Trash** option. For further information on the delete operation, see [section How to delete a data record from an entity](#).

From the recycle bin, you can permanently delete data records or restore them to the entity they were deleted from.

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

For further information, see [section Accessing data containers and data models](#).

To recover deleted data records, complete the following:

- In the **Menu** panel, click on **Browse - Recycle Bin**

The following page displays.

Welcome Data Browser Recycle bin								
*		Search						
Data Container	Revisi	Entity	Ids	Part patl	User Name	Date	Delete	Restore
DStar		Agent	JenEi	/	administrator	2011-11-29 01:	✗	✓
DStar		Agent	JimSm	/	administrator	2011-11-29 01:	✗	✓
DStar		Agent	JeaCl	/	administrator	2011-11-29 01:	✗	✓

2. Click on the tick sign next to the data record you wish to restore.

A message displays prompting you to confirm the restore operation.

3. Click on **Yes**.

The data record is restored from the recycle bin. You can now see the data record in the data record list.

To delete data records permanently:

1. On the [**Recycle bin**] page, click on  next to the data record you want to delete.

A dialog box displays to confirm the deletion operation.

2. Click on **Yes**.

The data record is deleted permanently from the MDM server.

3.3.9. How to view the log file for a data record

The log file for an open data record lists descriptions of events associated with this specific data record.



You can access a log file that lists information on all data records through the **Journal** menu option. For more information, see [section Viewing log files for all data records](#).

Prerequisite(s):

-The MDM server is already launched.

-At least one view has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.



Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

For further information, see [section Accessing data containers and data models](#).

To view the log file for a specific data record, complete the following:

1. In the [**Data Browser**] page, search for the data records pertaining to the entity of interest.

All searched data records are listed in the page. The first record is selected by default and its details are displayed in the panel to the right. For more information, see [section How to search entities in the selected data container](#).

2. Click on any of the listed data records to open the record detail.

Talend MDM > D* Agent JenEi

D* Agent

D* Agent | **Agency**

Save | Save and close | Delete | Duplicate | Journal | >>

Picture (optional)

Identifier *

Firstname *

Lastname *

Commission Code *

Start date *

Termination Date

Status

- Click on **Journal** to open the log file of the record.

Journal

Search Panel

Entity: Key:

Source: Operation Type:

Start Date: End Date:

Results | **Timeline**

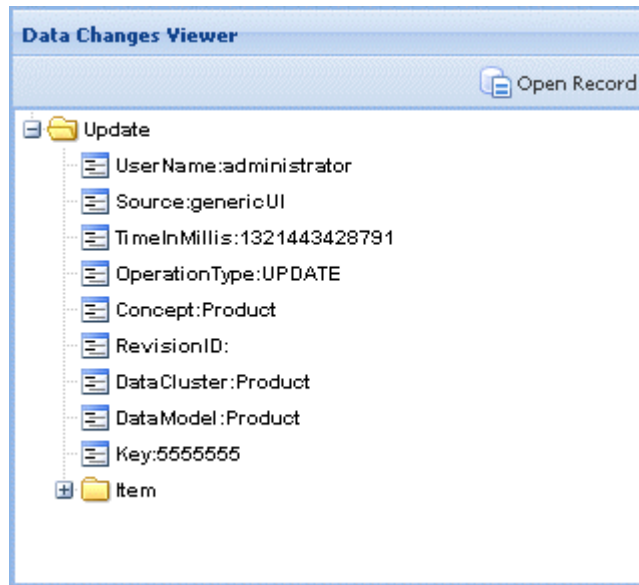
Data Container	Data Model	Entity	Key	Revision ID	Operation Type	Operation Time	Source	User Name
DStar	DStar	Agent	JenEi		ACTION	20111110 14:55:58	genericUI	administrator
DStar	DStar	Agent	JenEi		ACTION	20111114 17:52:21	genericUI	administrator
DStar	DStar	Agent	JenEi		ACTION	20111114 17:53:27	genericUI	frank
DStar	DStar	Agent	JenEi		ACTION	20111114 17:53:49	genericUI	frank
DStar	DStar	Agent	JenEi		UPDATE	20111114 18:08:43	genericUI	administrator
DStar	DStar	Agent	JenEi		UPDATE	20111114 18:10:12	genericUI	administrator
DStar	DStar	Agent	JenEi		ACTION	20111114 18:14:06	genericUI	jennifer

Page 1 of 1 Number of lines per page : 20 Displaying items 1 - 7 of 7

Here you can view information on all the events associated with the selected data record.

To view a detailed description of one of the listed events, complete the following:

- On the **[Journal]** page, double-click on a row.
A page called **[Data Changes Viewer]** opens.



Here you can view several pieces of information about the modified data record, including the source, type of change, the impacted data record and the relevant entity.

2. Expand the **Item** folder(s) to view the values which have been changed.

The **Update** folder contains the same information as the record row you clicked on to open the **[Data Changes Viewer]** page. Each **Item** folder represents a value which was changed at the moment the specific record update took place. Therefore, if two item folders are displayed, then this means that two values were changed.

The **Item** folders always contains the same information:

- path:/Entity/attribute,
- oldValue: old attribute value,
- newValue: new attribute value.

You can see the item information which has been updated. For example, an item name or description, as well as the old and new values linked to the item. In this case, you can see that the agent first name changed from *Jen* to *Jenni*.

3. If required, click **Open Record** in the upper right corner of the page to open the record detail.

A **Before** and **After** panels in the lower part of the page show the complete details of the source record and modified record respectively.



If you log in to *Talend MDM Web User Interface* as an administrator, a **Restore** button will display in the **Before** and **After** panels. This button enables the administrator to restore the old version of the record.

You can also view item events using the **Journal** option on the **Menu** panel. This is useful if you want to search for changes based on the source of change, operation type or date, rather than by specific item, for example. For further information, see [section Viewing log files for all data records](#).

3.4. Using inheritance and polymorphism

Talend MDM introduces a true object oriented data model that allows to use inheritance and polymorphic characteristics when defining data models in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.

If inheritance and polymorphic characteristics are used when defining data models in the Studio, you can have access at runtime to elements extended from other attributes or entities in the data model where you can decide which to choose.

For instance, you can have an address established as a main generic address and at run time defines it as a US or European address.

The screenshot shows the Talend MDM web user interface. On the left, there is a table with columns: Id, Firstname, Last, Date, and C. The table contains four rows of data. The first row is selected. The main part of the interface shows the 'Person' entity form. The form has a header 'Person' and a sub-header 'Person'. Below the header, there are buttons: Save, Save and close, Delete, Duplicate, Journal, and a refresh icon. The form fields are: Id (25be0519-d463-4088-9001-dfeb414906fc), Firstname (Jean), Lastname (Dupond), Date of Birth (empty), Postal Code (empty), Resolution (empty), Address (expanded dropdown menu), Line1 (empty), Line2 (empty), City (Paris), PostalCode (75000), and Country (FRANCE). The dropdown menu for AddressType shows four options: EUAddressType, AddressType, EUAddressType, and USAddressType. A mouse cursor is pointing at the first EUAddressType option.

3.5. Running a Runnable Process designed in the Studio

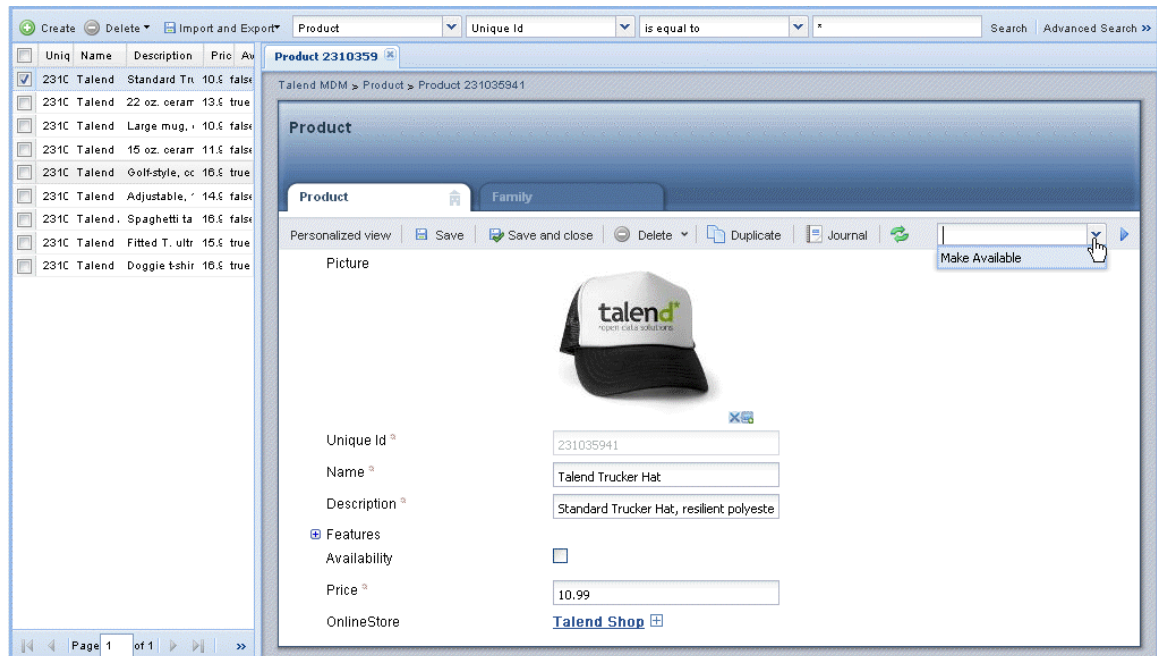
If a Runnable Process is created on a specific business entity from *Talend Open Studio for MDM*, it is automatically listed in the **[Data Browser]** page in *Talend MDM Web User Interface*. Such a process can be designed to do different tasks, for example sending an entity by email.


Prerequisite(s):

- The MDM server is already launched.
- At least one Runnable Process has been created in *Talend Open Studio for MDM*.

To execute a Runnable Process from the web interface, complete the following:

1. On the **Menu** panel, click on **Browse** and then select **Data Browser**.
2. From the entity list, select the entity on which the Runnable process has been created. All data records pertaining to the selected entity are displayed in the page, the first record in the list is selected by default and its detail display in the panel to the right.



3. Click the record on which you want to run the Runnable process in order to open its detail in the panel to the right
4. In the upper right corner of the detail view, click the arrow to display a list of all the Runnable Processes designed in the Studio on the selected entity.
5. Select the process you want to execute on the open data record and then click the  button to the right of the list.

This will execute the selected process carrying out on the open record the tasks defined in the process.

3.6. Running a Standalone Process designed in the Studio

If a Standalone Process is created in *Talend Open Studio for MDM*, it is automatically listed in the **[Welcome]** page in *Talend MDM Web User Interface*.

Such a process is not linked to a specific entity and can be designed to do different tasks on master data, for example adding a new record/entity in the XML repository, launching a job to do some check or transformation on master data, or launch a job to return a specific result in a new tab in the web interface.

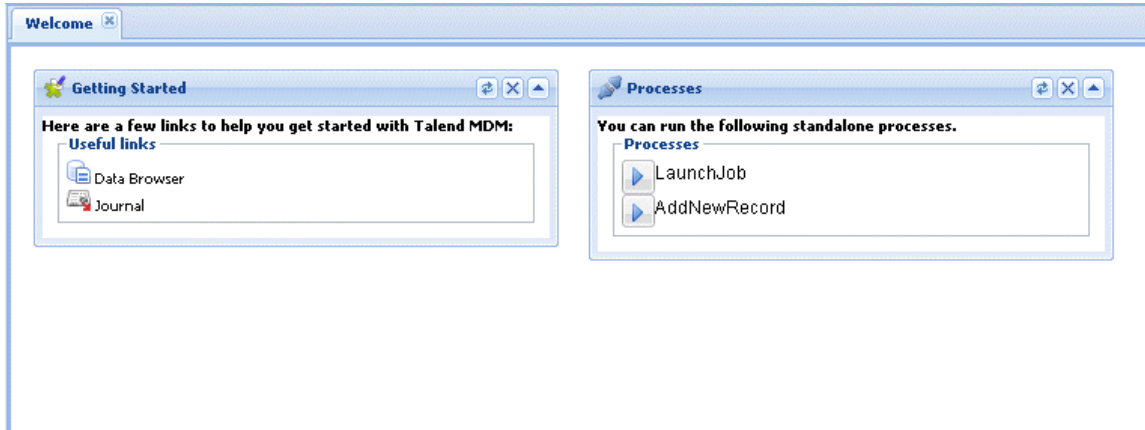
Prerequisite(s):


-The MDM server is already launched.

-At least one Standalone Process has been created in *Talend Open Studio for MDM*. For further information, see the *Talend Open Studio for MDM Administrator Guide*.

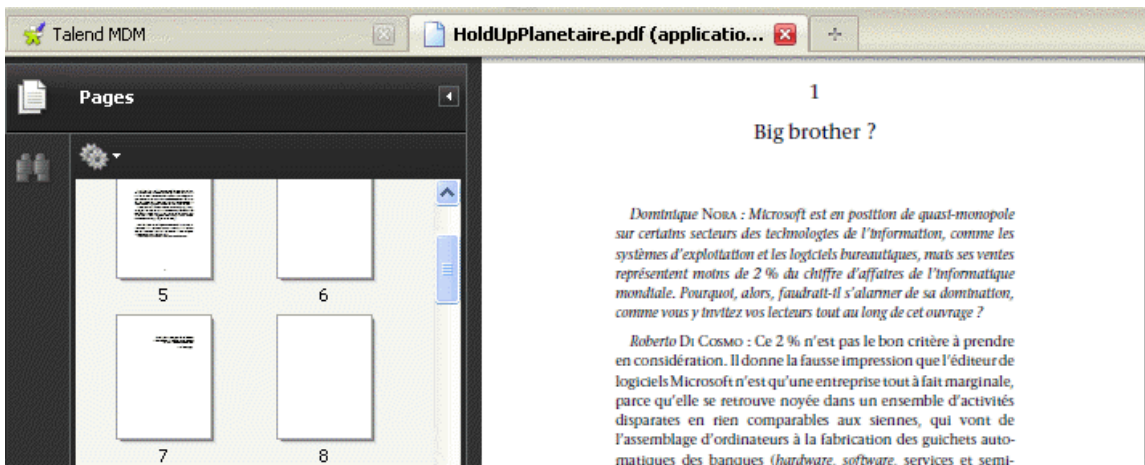
To execute a Standalone Process from the web interface, complete the following:

1. Log in to *Talend MDM Web User Interface* to display the **[Welcome]** page. For further information, see section [Logging into the Web User Interface](#).



2. In the **Processes** panel, click the  button that corresponds to the Standalone Process you want to execute. *LaunchJob* in this example.

This *LaunchJob* Standalone Process calls a Job which passes to the Process output variable the URL of a PDF you want to display in a new tab in the Web User Interface. You can then save or print the returned result.



For further information on how to define such a Standalone Processes, see the *Talend Open Studio for MDM Administrator Guide*.



To be able to run a Standalone Process that returns a result without problems as in the example above, make sure that the configuration of your web browser is set correctly: not to block pop-up windows and to open new windows in new tabs.



Chapter 4. Other management procedures

This chapter provides the information you need to carry out some advanced MDM procedures including synchronizing master data on multiple MDM servers or Versions, using cross-referencing tables for content adaptation and generating master data reports.

4.1. Viewing log files for all data records

The log file lists descriptions of every event associated with each data record in the MDM hub. This page is useful if you want to search for changes based on the source, operation type or date, rather than by a specific data record, for example.

Prerequisite(s): The MDM server is already launched and you have logged in to *Talend MDM Web User Interface*.



Make sure that you have selected:

- the data container that holds the master data you want to manage,
- the data model against which the master data will be validated.

For further information, see [section Accessing data containers and data models](#).

To create this view, complete either of the following:

1. From the **[Welcome]** page, click **Journal**.
2. Or, on the **Menu** panel, click on **Browse** and then select **Journal**.

A table of data records appears in the new page, along with various search options.

Journal

Search Panel

Entity: Key:

Source: Operation Type:

Start Date: End Date:

Reset Search Export to Excel

Results **Timeline**

Data Container	Data Model	Entity	Key	Revision	Operation Type	Operation Time	Source	User Name
crossreferencing	crossreferencing	Context	working		UPDATE	20111024 18:01:42	genericUI	admin
DStar	DStar	Agent	JimSm		UPDATE	20111025 09:48:19	workflow	administrator
DStar	DStar	Agent	JimSm		ACTION	20111025 09:48:00	genericUI	administrator
DStar	DStar	Agent	JeaCI		UPDATE	20111025 09:49:59	workflow	frank
DStar	DStar	Agent	JeaCI		ACTION	20111025 09:49:52	genericUI	frank
DStar	DStar	Agent	JenEi		ACTION	20111110 14:55:58	genericUI	administrator
DStar	DStar	Agency	IL05		UPDATE	20111114 15:27:42	genericUI	administrator
DStar	DStar	Agency	NJ02		UPDATE	20111114 15:34:27	genericUI	administrator
DStar	DStar	Agency	NJ03		UPDATE	20111114 15:42:47	genericUI	administrator
DStar	DStar	Agency	NY01		UPDATE	20111114 15:42:47	genericUI	administrator
DStar	DStar	Agent	JenGa		LOGIC_DELETE	20111114 17:35:12	genericUI	administrator
DStar	DStar	Agent	RutRo		LOGIC_DELETE	20111114 17:35:12	genericUI	administrator
DStar	DStar	Agent	HarNi		LOGIC_DELETE	20111114 17:35:13	genericUI	administrator
DStar	DStar	Agent	JenGa		RESTORED	20111114 17:40:04	genericUI	administrator

Page 1 of 2 Number of lines per page : 20 Displaying items 1 - 20 of 23

You can limit the results by using the options in the **Search Panel** at the top of the page. For further information, see [section How to search for specific logs](#).







You can switch between the log table and a time line view - a design showing a calendar labeled with dates and events labeled on points where they have happened - using the **Results** and **TimeLine** tabs.

In the log table you can see a list of all the events concerning the data records in the MDM hub. The default column headings show you the following information concerning each data record:

Column name	Description
Data Container	Name of the data container that pertains the data record.
Data Model	Name of the data model against which the data record is validated.
Entity	Name of the business entity that pertains the data record.
Key	The primary key of the data record.
Revision ID	The identifier of the master data Version that pertains the data record.
Operation Type	Type of operation carried out on the data record: either UPDATE , DELETE , CREATE or ACTION .
Operation time	Date and time of the operation.
Source	Name of the source through which the data record modification took place, i.e. a Talend job, the Web User Interface (manually by a data steward), etc.
User name	Login name of the user who made the modification.

4.1.1. How to search for specific logs

The **Search Panel** at the top of the **[Journal]** page allows you to set various search criteria to narrow the results yielded.

1. In the **Entity** field, type in the name of the entity you want to limit the search to.
2. From the **Source** list, select the source of the modifications:
 - genericUI**: if data is modified through *Talend MDM Web User Interface*,
 - adminWorkbench**: if data is modified through *Talend Open Studio for MDM*,
3. If you know the key which corresponds to a specific data record of interest, type it in the **key** field.
4. From the **Operation Type** list, choose the type of event among the listed ones.
5.  Click on  next to the **Start Date** field.
A calendar appears.
6. Select the relevant **Start Date** from the calendar.
7.  Click on  next to the **End Date** field.
A calendar appears.
8. Select the relevant **End Date** from the calendar.
9. Click on the **Search** button on the bottom right corner of the search panel.
The page displays the records which meet the specified search criteria.

The screenshot shows a 'Search Panel' at the top with the following fields: Entity (Agent), Source (genericUI), Start Date, Key, Operation Type (LOGIC_DELETE), and End Date. Below the search fields are buttons for 'Reset', 'Search', and 'Export to Excel'. The 'Results' tab is active, displaying a table with 9 columns: Data Container, Data Model, Entity, Key, Revisio, Operation Type, Operation Time, Source, and User Name. The table contains three rows of log data. At the bottom, there is a pagination bar showing 'Page 1 of 1', 'Number of lines per page : 20', and 'Displaying items 1 - 3 of 3'.

Data Container	Data Model	Entity	Key	Revisio	Operation Type	Operation Time	Source	User Name
DStar	DStar	Agent	JenGa		LOGIC_DELETE	20111114 17:35:12	genericUI	administrator
DStar	DStar	Agent	RutRo		LOGIC_DELETE	20111114 17:35:12	genericUI	administrator
DStar	DStar	Agent	HarNi		LOGIC_DELETE	20111114 17:35:13	genericUI	administrator

From this log table, you can:

- click the **Export to Excel** tab to export the log list in an .xls file,
- click the **Reset** tab in order to clear the search fields and set new search criteria before clicking the **Search** tab,
- double click any of the log items to view the details of the changes which occurred. For further information, see [section How to view the log details](#).

4.1.2. How to view the log details

To view the details of any of the listed logs, complete the procedure outlined in [section How to view the log file for a data record](#).

4.1.3. How to manage the log list display

On the **[Journal]** page, you can choose to order the events by numerical or alphabetical order, for any of the columns. You can also show/hide one or more columns in the list.

To order the events list according to specific criteria, complete the following:

1. Move the pointer over a column name and click on the arrow which appears.

A drop-down list appears.

2. In the drop-down list, select:

Item	To...
Sort Ascending	arrange the list in an ascending order
Sort Descending	arrange the list in an descending order
Columns	display a drop-down list where you can select/clear the check box next to the column(s) you want to show/hide

To show or hide any of the columns:

1. Move the pointer over any of the column headings and click on the arrow.

A drop down menu appears.

2. Place the pointer on **Columns**.

A list of all the column names appears.

Data Contain	Data Model	Entity	Key	Revision ID	Operation Type
Location			JohVI		UPDATE
Location			22		UPDATE
Location			11		UPDATE
Location					UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency			UPDATE
Location	Location	Agency	10		UPDATE

All of the visible columns have their corresponding check boxes selected in the list. Select or clear the check boxes next to the name of the column, according to the view you want to create.

