IDEA+ Integration Data Enablement Analytics

Workspace User Guide

September

Version 1.0

Document Revisions

Date	Version Number	Document Changes	Modified by
05/02/20xx	1.0	Initial Draft	

Approvals

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1 Introduction

1.1 Scope and Purpose

This user guide provides an understanding of workspaces in the IDEA+ environment for any of the following platforms: Netezza, SQL Server or Hadoop. It also, provides step-by-step instruction on how to access, connect to and use workspaces.

1.2 Manual Overview

This document is divided into the following chapters:

1. Chapter 1 – Introduction
2. Chapter 2 - What is a Workspace
3. Chapter 3 – How to Request a New Workspace
4. Chapter 4 – How to Request Access to a New Workspace
5. Chapter 5 – How to Connect to a Workspace

1.3 Need Help

If you encounter issues not addressed by this user guide, please contact the Enterprise Service Desk (ESD) for support.

2 What is a Workspace?

A workspace is a section of the EDW that is allocated for analytical End User Computing (EUC).

As the type of data in EDW continues to grow, the need for moving data from various source systems to localized EUCs will decrease.

Workspaces will be located on the same platform as integrated enterprise data, allowing for easier data manipulation to occur within a centralized, scalable system.

2.1 Types of Workspaces

Two types of workspaces are offered in IDEA+; a Business Workspace and an Application Workspace.

2.1.1 Business Workspace

Business Workspaces are intended for exploratory analytics, they:

- Provide read and write privileges to construct data structures that are frequently created, modified and deleted.
- Are designed as sandboxes for exploring data on a temporary basis. For example, you need to run a complex query, store the result and export a copy to Excel for reporting purposes.
- Can link Business Workspace (BW) tables using MS Access with the generic (non-logon ID).
- Are not designed for modifying data.
- Provide all users who have access to the BW the same permissions.

2.1.2 Application Workspace

Application workspaces are only to be used for analytical applications, they:

- Are used to host non-coupled or loosely coupled data that supports analytical applications.
- May allow privileged users to have the ability to modify data structures. This will be allowed less frequently than for business workspaces.
- Have tables that remain static.

2.1.3 Workspaces Differences

The differences between the two workspaces are as follows:

	Business Workspace	Application Workspace
Data Structures	• Frequently changing • Most users have the ability to create, modify and delete	• Relatively static • Only some users have create, modify and delete access
Data Persistence	• Indefinite	• Indefinite
User Interface	• Typically DBVisualizer, TOAD, MS Access or other tools with an informal User Interface (UI)	• A more formal UI layer is usually layered on the Application Workspace. The UI is supported and maintained by Business
Support Role	• None, apart from making sure that the underlying platform is available	• None, apart from making sure that the underlying platform is available and backups are being performed.
Access	• Defined by the workspace owner	• Defined by the workspace owner
Environment	• Production server; unsupported data and structures	• Production server; unsupported data and structures
Governance Review	• Yes	• Yes
PII Permitted	• No	• No
Backups	• Not Performed	• Performed daily (proposed)

Table 2.0: Differences Between the Two Workspaces

NOTE: PII - Personally identifiable information

Workspace Platforms

The following workspace platforms are available:

	Netezza	SQL Server	Hadoop
Data Volumes	• Up to 100M rows, tables	• Up to 100M rows, tables	• Up to 100M rows +
Data Structures	• Structured data	• Structured data	• Unstructured, semi-structured and structured data
Processing	• Batch-oriented workloads, with low-latency queries	• Transactional workloads with low-latency queries	• Non-transactional workloads with some latency in query response time
SQL Standard	• ANSI-92	• ANSI-92	• HiveQL (limited ANSI-92 support)
Available data manipulation tools for use by end users	• SQL • Stored procedures	• SQL • Stored procedures • SSIS	• Map/Reduce (Java) • Pig • Hive • Python/Spark
Level of technical expertise required	• Low	• Low	• Must be familiar with CLI and basic POSIX • Will need to learn: syntax and limitations of Hive and HDFS basics

Table 2.1: Workspace Platforms

3 How to Request a New Workspace

Now it is time to request a workspace. Simply follow the steps below.

1 Cut and paste the following link into your browser to display the **EIM Intake site: New Item** form.

http://teams-

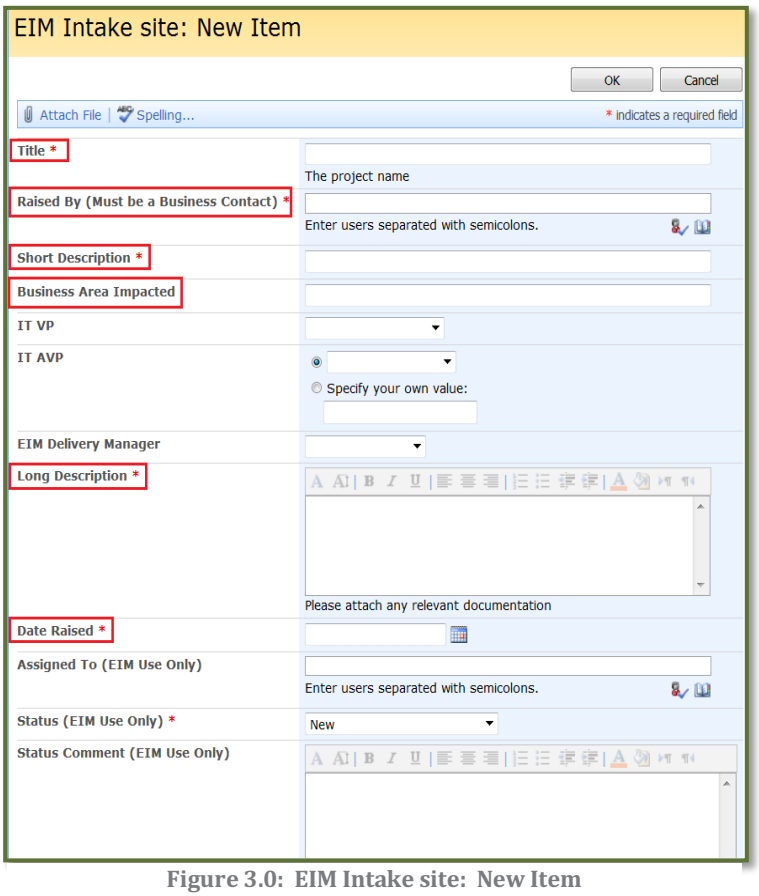

Figure 3.0: EIM Intake site: New Item

cantire.ctc/sites/IM/Lists/EIM%20Intake%20site/NewForm.aspx?RootFolder=%2Fsites%2FIM%2FLists%2FEIM%20Intake%20site&Source=http%3A%2F%2Fteams%2Dcantire%2Ectc%2Fsites%2FIM%2FLists%2FEIM%2520Intake%2520site%2FOpen%2520Items%2Easpx

2 Go to the **Title** field and enter a topic name, project name, title or phase for the workpace you are requesting.

*Example of **Titles** would be:*

"Loyalty Phase1"

"CTFS Project X"

3

At the **Requested By** field enter your name or/and your Manager's name.

4 At the **Short Description** field enter a summary of the project.

Eg. I need a Business Workspace to

5 At the **Business Area Impacted** field enter the name of your business area.

6 At the **Long Description** field enter a detailed description of the project.

7 At the **Date Requested** field enter the date that you submitted the request for the workspace.

8 Click the **OK** button to submit your request.

NOTE: Someone from IDEA+ will contact you to follow-up on your workspace request.

When the IDEA+ personnel contact you for the workspace request, they may ask the following questions:

- Is the request for an application workspace or a business workspace?
- In which Database would the workspace be created?
- How are you going to use the workspace? Do you need data from EDW for the workspace?
- How will the workspace be populated? If data from EDW is required, is there a list of subject areas, tables?
- Who will populate and refresh the workspace. Will there be a request for that as well?
- Are there any known data, volume and sizing?

4 How to Request Access to an Existing Workspace

You have been granted a workspace and need to access to it. Follow the steps below to request access to an existing workspace.

NOTE: The Access to Workspace Form is a progressive form; as you enter information in selected fields, it will expand to display additional fields.

1 Cut and paste the following link into your browser to display the **Access to Workspace Form**.

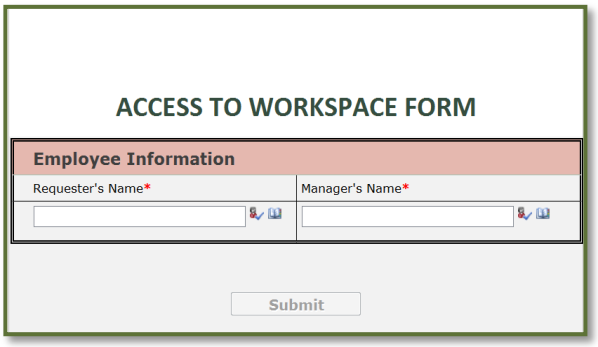

Figure 4.0: Access to Workspace Form

http://teams.ctc/sites/IMBI/IM/_layouts/FormServer.aspx?XsnLocation=http%3a//teams.ctc/sites/IMBI/IM/Access%20To%20Workspace/Forms/template.xsn&OpenIn=browser&SaveLocation=http%3a//teams.ctc/sites/IMBI/IM/Access%20To%20Workspace&Source=http%3a//teams.ctc/sites/IMBI/IM/Access%20To%20Workspace

2

Go to the **Requester's Name** field and use the Outlook address book to select your name and populate the field.

Repeat step 2 to enter your Manager's name in the **Manager's Name** field and expand the form to display more input fields.

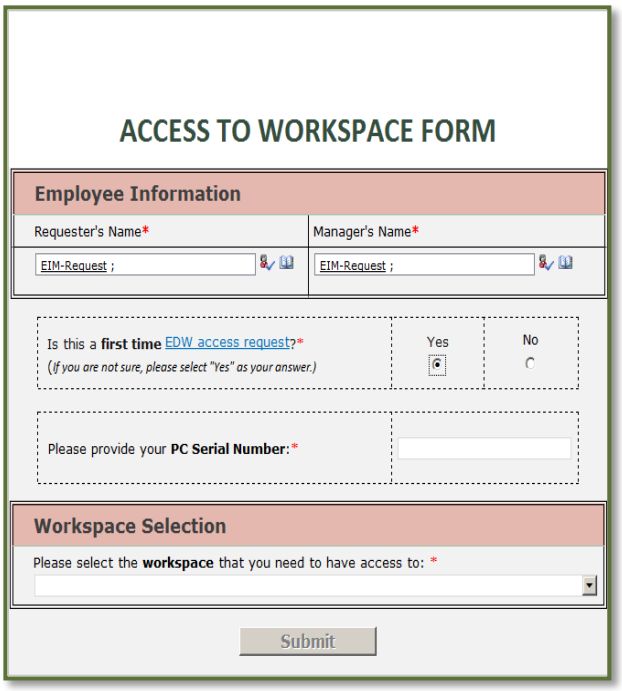

Figure 4.1: Expanded Access - Workspace Selection

3 If this is a first time EDW access request, select the **Yes** button and click tab to go to the next field and enter your **PC Serial Number**.

4 At the **Workspace Selection** section, select the name of the workspace you were given when you requested a new workspace.

If you require access to restricted data the **Terms and Conditions of Restricted Data Usage** section will be displayed.

5 At the **Terms and Conditions of Restricted Data Usage** section, read the terms and conditions and check the **I Agree** checkbox.

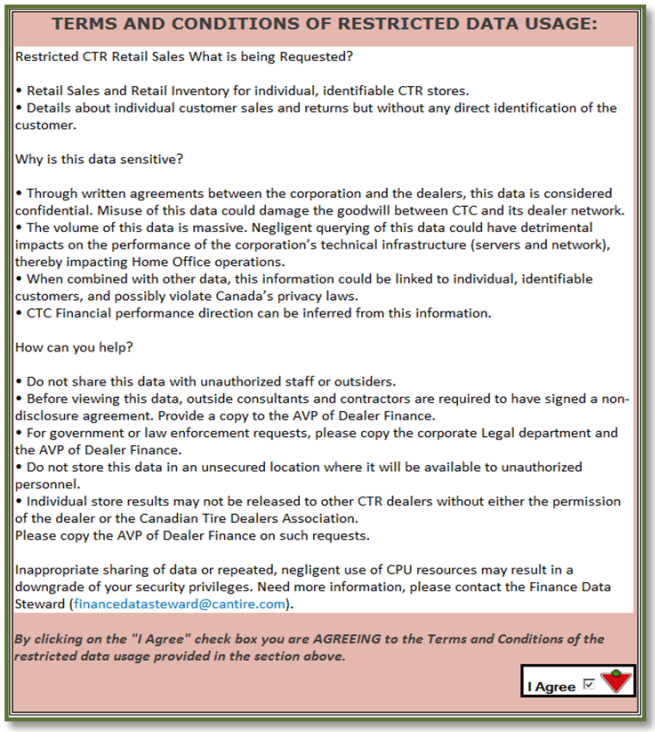

Figure 4.2: Workspace Terms and Conditions usage

6

Go to the **Request Rationale** section and enter the reason for requesting access to the workspace.

Tab to the **end date** field and use the calendar to select an end date.

For now select an end date that is one year from the current date.

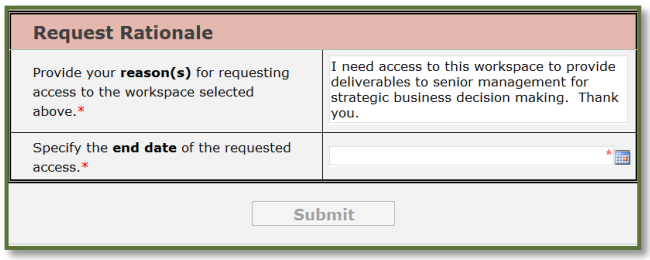

Figure 4.3: Workspace Request Rationale

7 Click the **Submit** button to complete the request. You will be notified when the request has been processed.

5 How to Connect to a Workspace

After you have been given access to a workspace, you need to connect to it in order for you to do any analytical exploration.

Instructions for connecting to a workspace are divided in two parts: How to Access a Workspace Using ODBC Data Sources and How to Configure the ODBC Connection to the Workspace.

5.1 How to Access a Workspace Using ODBC Data Sources

ODBC is a standard protocol for programs to obtain access to SQL database servers. To connect to the work space using ODBC data sources, follow the steps below.

1. Click the **Windows Start** button and type "**odbc**" in the run program text box to display the ODBC program.

2. Click the **Data Sources ODBC** link to display the **User Account Control** box.

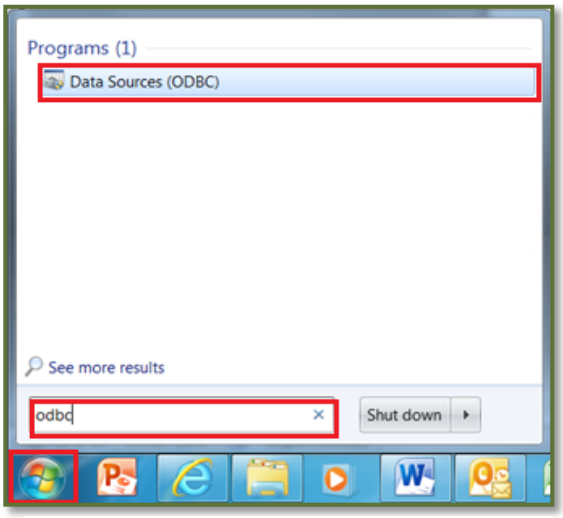

Figure 5.0: Access to Workspace Form

3. Click the **Yes** button. See Figure 5.2.

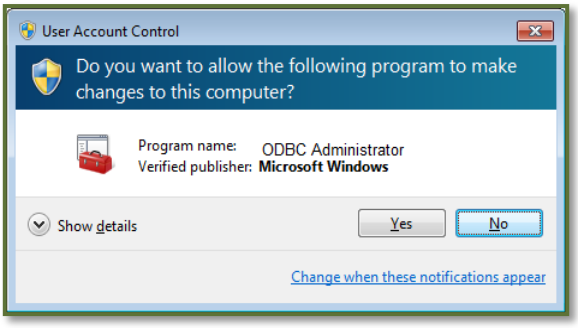

Figure 5.1: Access to Workspace Form

5.2 How to Configure the ODBC Connection to the Workspace

After you have connected to the workspace, you need to configure the ODBC connection to the workspace. Follow the instructions below.

1 Click the **User DSN** tab to display a list of User Data Sources.

Select the name of your workspace and click the **Configure** button. See Figure 5.3.

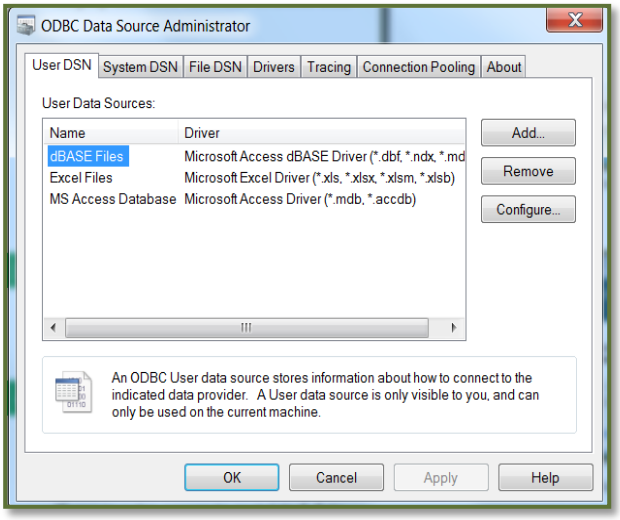

Figure 5.2: ODBC Data Source Administrator

NOTE: If the name of your workspace does not appear in the list, go to step 4.

2 Click the **Test Connection** button. See Figure 5.4.

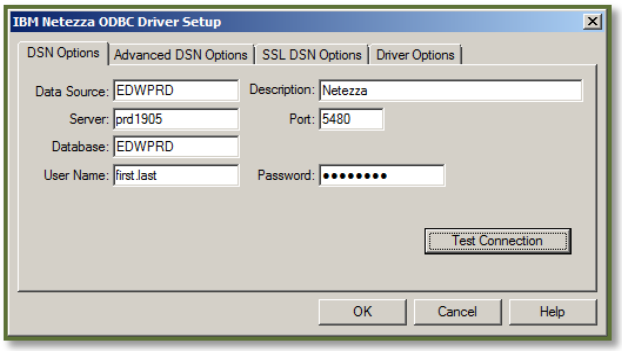

Figure 5.3: ODBC Data Source Administrator

3 Click the **OK** button to complete the process.

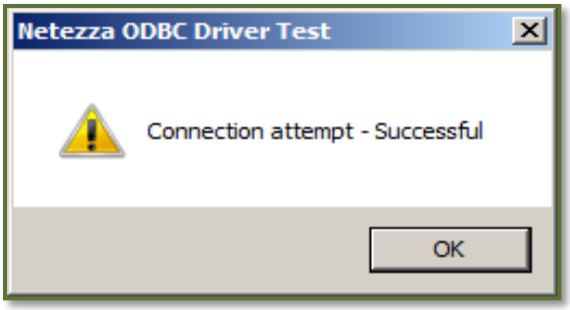

Figure 5.4: ODBC Data Source Administrator

4 If the name of your workspace is not listed in the **User Date Sources** list, click the **Add** button. See Figure 5.6.

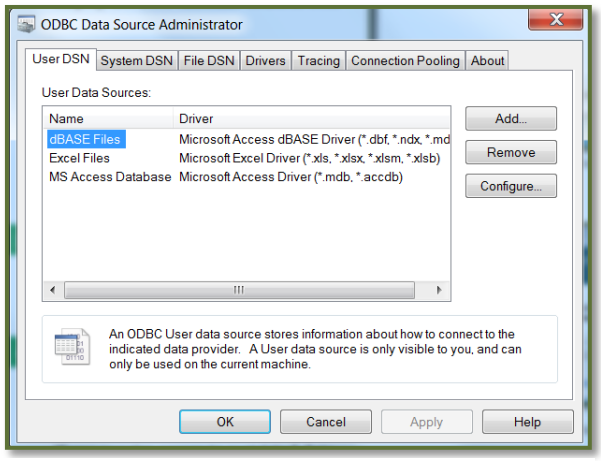

Figure 5.5: ODBC Data Source Administrator

5 Select **NetezzaSQL.** See Figure 5.7.

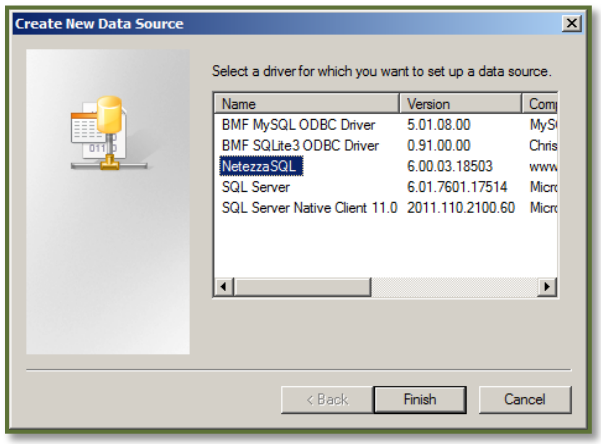

Figure 5.6: ODBC Data Source Administrator

6 Complete the fields as follows:

Data Source: Choose a suitable name, e.g. your workspace name with a number added to it.
Description: Choose a suitable description.
Server: prd1905
Port: 5480
Database: Enter the name of your workspace.
User Name: Enter your Windows user login name.
Password: Enter your Windows login password.
Click **Test Connection**. See Figure 5.7.

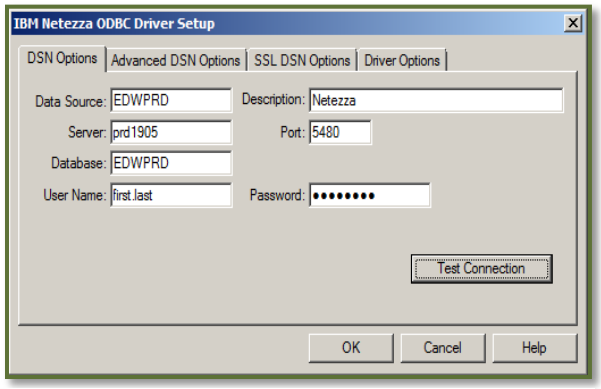

Figure 5.7: ODBC Data Source Administrator

7 Click **OK** to complete the process.

NOTE: ***If the Netezza ODBC Driver Test box does not appear, contact the ESD for support.***

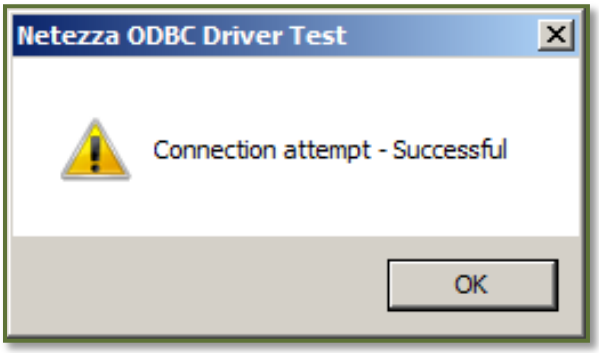

Figure 5.8: ODBC Data Source Administrator