## **Elixir Universe**

Release 3.5.0



Elixir Technology Pte Ltd

#### Elixir Universe: Release 3.5.0

Elixir Technology Pte Ltd

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# **Chapter 1**Introduction

## What is a Universe?

A universe is a collection of related data tables which provides access to all information needed to construct an ad-hoc report or dashboard.

In cases where the system knows the primary key and foreign key relationships between the tables, it automatically joins data from various tables and presents you the information seamlessly.

Logically, each Universe should represent a single domain. For example, in a vehicle store, there could be a Universe named Cars which may contain tables for model details, sales and service details. Similarly, there could be another Universe named Bikes containing all bike related information.

Using the above example, you can pull in statistics such as the number of cars sold versus the number of bikes sold, how reliable each car was, popularity for a particular vintage model of a car versus the same model of a bike and so on.

This manual describes the different kinds of universes and how to create and use them effectively.

# **Chapter 2**Universe Types

There are three types of universes that you can create. This chapter explains these types.

#### **JDBC Universe**

The JDBC Universe allows data to be read from a relational database using a JDBC driver.

You can access your data using SQL statements. If you have all your data in a relational database, and a JDBC driver is available for your database, then use a JDBC Universe to access your data.

## **Repository Universe**

You can use any Elixir data source to read your data when using this Universe.

You can access data from a large number of data sources such as JDBC, Excel, XML and flat files.

You can mix data from any supported format. You can either embed the data sources in the Universe or maintain them as external links.

#### **Stave**

The Stave universe allows data to be read from a column based Stave datastore.

Every column in a Stave table is already sorted and grouped. This enables lightning fast data retrieval, and facilitates better data compression.

Each column in Stave has the following characteristics:

- An attribute one of: Boolean, Decimal, Double, Long or String.
- An encoder/decoder.
- A compressor/decompressor (gzip is the default).
- Attributes
- The row index acts as the Primary Key.

# **Chapter 3**Creating a Universe

## **Before You Begin**

Note the following points, when creating any Universe.

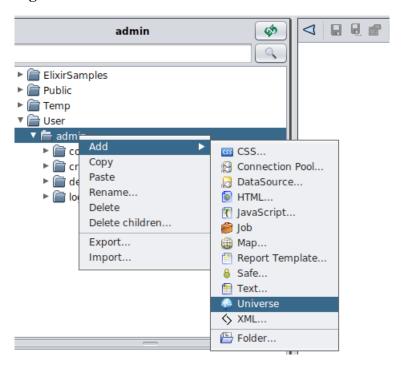
- Create a Universe file based on the origins and stability of the data. For example, you can create
  a Stave Universe if the data is stable and rarely changes. If your data comes from a JDBC database,
  use a JDBC Universe. Or, if you need to fetch data from multiple kinds of data sources, use a
  Repository Universe.
- If you want your Universe to be usable by others, do not save it in your user folder, instead save it in a publicly accessible folder such as /Public.
- Review the data from the Universe Designer by viewing it in the Rows tab, as described in the section called "Rows"
- Map the Universe file so that it can be referenced by other tools. This can only be done by an administrator. An example of Mapping is shown in the section called "Exporting the Universe".
- Assign access rights to the Universe, as desired. This is shown in the section called "Setting the Universe Access Permissions".
- Finally, save the Universe as a Published Template for Ad-Hoc Dashboard and Ad-Hoc Report. This is described in the section called "Exporting the Universe".

## **Creating a JDBC Universe**

To create a JDBC Universe:

- 1. Login to the Ambience Designer.
- 2. Right click the location where you want to add the Universe. Select Add Universe as shown in Figure 3.1, "Menu to Add a Universe":

Figure 3.1. Menu to Add a Universe



3. Enter a name for the Universe and select the type as JDBC, as shown in Figure 3.2, "Adding a JDBC Universe":

Figure 3.2. Adding a JDBC Universe



4. Click **Finish**. The universe is then created and opened in the Universe Designer.

## **Creating a Repository Universe**

To create a Repository Universe:

- 1. Login to the Ambience Designer.
- 2. Right click the location where you want to add the Universe. Select Add Universe as shown in Figure 3.1, "Menu to Add a Universe".
- 3. Enter a name for the Universe and select the type as Repository, as shown in Figure 3.3, "Adding a Repository Universe":

Figure 3.3. Adding a Repository Universe



4. Click **Finish**. The universe is then created and opened in the Universe Designer.

## **Creating a Stave Universe**

To create a Stave Universe:

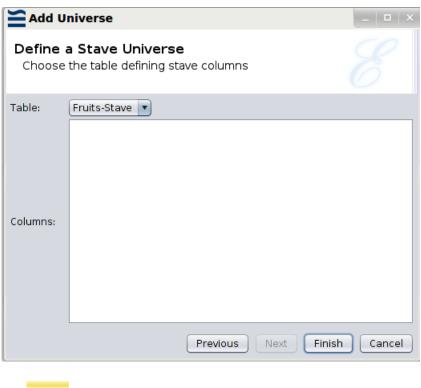
- 1. Login to the Ambience Designer.
- 2. Right click the location where you want to add the Universe. Select Add Universe as shown in Figure 3.1, "Menu to Add a Universe".
- 3. Enter a name for the Universe and select the type as Stave, as shown in Figure 3.4, "Adding a Stave Universe":

Figure 3.4. Adding a Stave Universe



4. Click **Next**.Select the Stave table that contains the data for the universe as shown in Figure 3.5, "Selecting a Stave Table".

Figure 3.5. Selecting a Stave Table





	See the Data Designer manual to know how to create a Stave table.
5.	Click <b>Finish</b> . The universe is then created and opened in the Universe Designer.

# Chapter 4

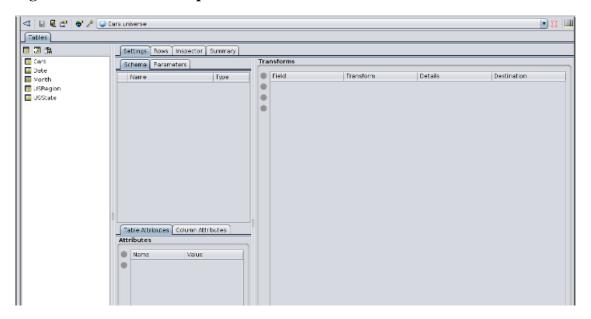
# **Universe Designer Walkthrough**

This chapter illustrates how a Universe looks in the Universe designer, and the various functionality it supports. You can easily create your Universe in a full graphical setting and export it for use.

## **Universe Designer**

An example of the Cars Universe that is shipped with Ambience, is shown in Figure 4.1, "Universe Example":

Figure 4.1. Universe Example



Once you create a Universe, the relevant tables are present on the left pane.

You can examine the contents of each table, inspect the various columns, manipulate data using Transforms, set various data attributes and finally export the Universe for use by Ad-Hoc Dashboard and Ad-Hoc Report.

## **Examining Table Structure**

You can view the columns that are in a table in the Schema tab.

An example is shown in Figure 4.2, "Examining Table Structure":

🚱 🔑 🕥 Cars.universe Tables Settings Rows Inspector Summary Cars Schema Parameters III Date Name Type Month vendor\_id Integer **USRegion** String dealer\_name USState String city state 🗫 String ZIP String area\_code String phone String invoice\_id Integer invoice\_num String invoice\_date Date 🖴 sale date Date disposal\_status String disposal\_facility\_nmvtis\_id Integer disposal\_facility\_contact... String sales\_type String invoice amount Decimal trade\_in\_VIN String trade\_in\_vehicle\_category String trade\_in\_make String

Figure 4.2. Examining Table Structure

The data parameters if any, are displayed in the Parameter tab.

## **Setting Attributes**

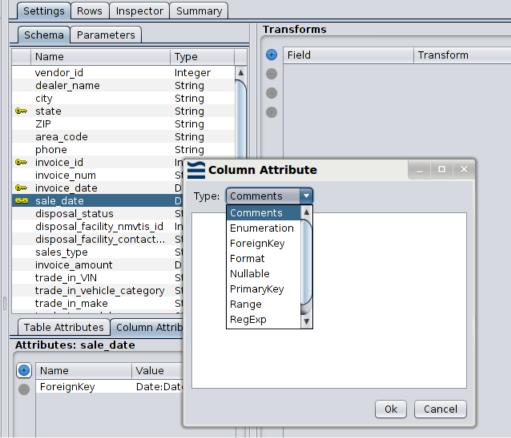
You can set various attributes such as table security, primary and foreign keys and the format of the data.

You can set attributes that are common to a table as a whole, and also individual column attributes.

An example of setting attributes is show in Figure 4.3, "Setting Attributes"

Figure 4.3. Setting Attributes

| Settings | Rows | Inspector | Sumi

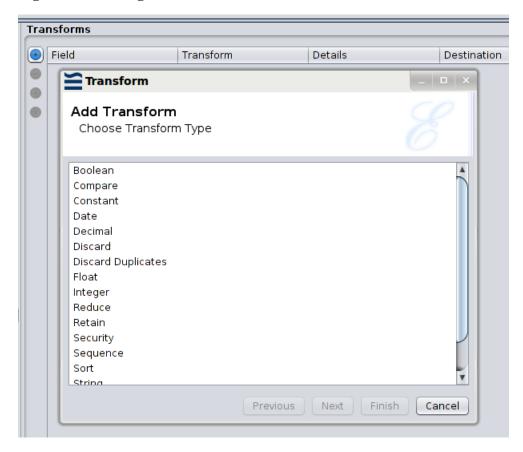


## **Transforming Data**

You can add various transforms to manipulate the output as desired. For an in-depth explanation of transforms, see the Elixir Transform User Manual.

An example of adding transforms is show in Figure 4.4, "Adding Transforms"

Figure 4.4. Adding Transforms



## **Examining Output Data**

The Rows tab displays the data that will be output. This output data includes entities that have been transformed by any transforms you have added.

An example of the data in Rows is show in Figure 4.5, "Examining Output Data"

Figure 4.5. Examining Output Data



## **Inspecting Column Data**

The Inspector tab enables you to review the contents of a column. It displays column information, value frequency based on the data type, as well as the chart type and plot.

An example of the data in the Inspector tab is show in Figure 4.6, "Inspecting Column Data"

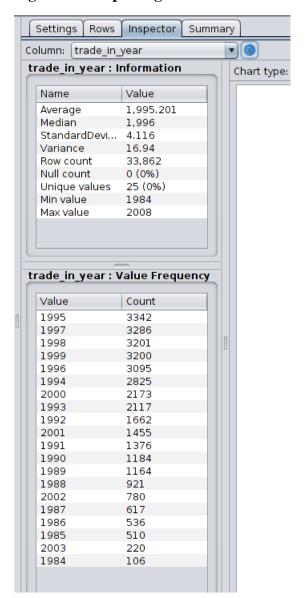


Figure 4.6. Inspecting Column Data

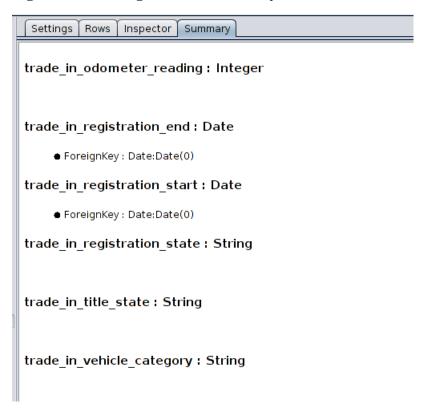
The example displays statistical data of the entities in the selected column, and the number of cars that were traded in for each year.

## **Viewing the Summary of Data**

The Summary tab displays the data type of each column, along with the primary and foreign key relationships between the columns.

An example of the data in the Summary tab is show in Figure 4.7, "Viewing the Data Summary"

Figure 4.7. Viewing the Data Summary



# **Exporting the Output Data**

You can easily export the output data for use by the Ad-Hoc Dashboard and the Ad-Hoc Report applications. Refer to the section called "Exporting the Universe" for the details.

# **Chapter 5**Using the Universe Designer

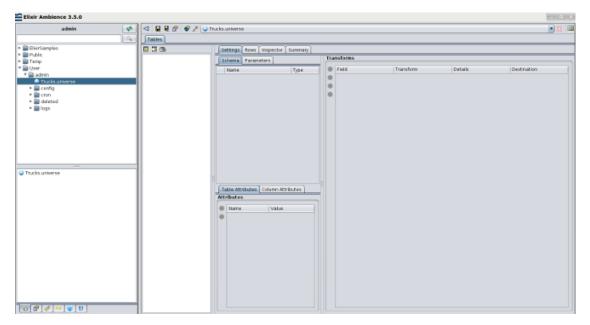
The Universe Designer allows you to create or import data sources into the universe, examine the rows in a table, set various table and column attributes, select the data to be transformed or displayed and create various transforms to transform the data to your desired results.

## **Repository Universe**

Double click a repository universe from the folder tree to open it in the Universe Designer.

The Universe Designer displays as shown in Figure 5.1, "Universe Designer":

Figure 5.1. Universe Designer



#### **Adding a New Table**

A Repository Universe allows you to select data from various table columns across multiple data sources. If the system deduces the relationships between the various columns and tables, based on the primary and foreign keys, it seamlessly joins and the data and outputs the results.

To add a new table column to the Universe:

- 1. Click the Add Table icon ( ).
- 2. Select the data source for which you want to add a table. Repository universe supports a large number of data sources. In the example shown in Figure 5.2, "Selecting a Data Source Repository Universe" we select a Tabular data source.:

New Datasource
Choose a datasource type

Form

Google
Spreadsheet

Cache

DBF

LDAP

DBF

LDAP

Text

FileSystem

Cancel

Previous

Next

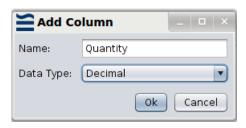
Finish

Cancel

Figure 5.2. Selecting a Data Source - Repository Universe

- 3. Enter a Name and a Description for the data source.
- 4. Click the Add icon ( ).
- 5. Enter a name for the column and select its data type as shown in Figure 5.3, "Adding a Column":

Figure 5.3. Adding a Column



- 6. Click **OK** to save the column.
- 7. Click the Add icon again, and repeat the process to add as many columns as you need.
- 8. Click Next.
- 9. You need to enter the values for the columns you have saved. Click the Add icon ( ).
- 10. Enter the values for the columns you have saved, as shown in Figure 5.4, "Adding a Column Value":

Figure 5.4. Adding a Column Value



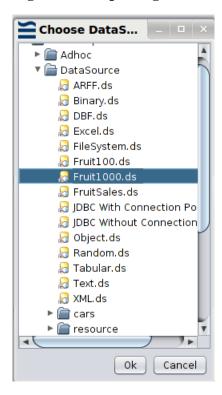
- 11. Click **OK** to save the column.
- 12. Click the Add icon again and repeat the process to add as many values as you need.
- 13. Click **Finish** to add the data source to the Universe.

### **Importing a Data Source**

To import an existing data source into the Universe:

- 1. Click the Import data source icon  $(\square)$ .
- 2. Select the data source to be imported, as shown in Figure 5.5, "Importing a Data Source":

Figure 5.5. Importing a Data Source



3. Click **OK**.

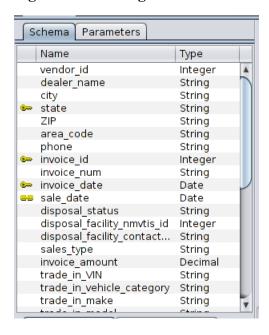
## **Settings Tab**

The Settings tab displays the structure of the data source. You can add table and column attributes to each field in the data source and add transforms to manipulate the data as desired before output.

#### **Schema Tab**

Click the Schema tab to view the database schema of the data source. An example is shown in Figure 5.6, "Viewing a Schema":

Figure 5.6. Viewing a Schema



#### **Parameters**

The Parameters tab displays the parameters of the data source if any.

The Parameter processor retrieves parameters from one input and applies them to another flow. This allows flows to be developed and reused with different sets of parameters. Parameters can be maintained independent of the flows.

For more information on Parameters, see Parameter Processor in the Data Designer Manual.

#### **Attributes**

This section allows you to add table and column attributes. You can define Primary Key and Foreign Key relationships between the various columns. You can set table level security, set up a table to be cached in memory, and set dimension parameters.

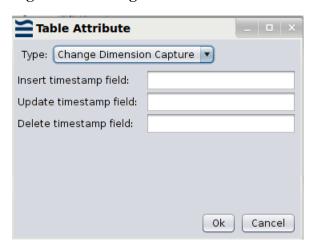
#### **Table Attributes**

This allows you to set the following attributes for the table as a whole.

Click the Add icon ( ).

The various table attributes are shown in Figure 5.7, "Setting Table Attributes".

Figure 5.7. Setting Table Attributes



1. Change Dimension Capture: This is used to determine and track the data that has changed, so that suitable actions can be taken using the changed data.

Tables whose changes must be captured usually have a column that indicates the time of last change. Any row in any table that has a timestamp in that column that is more recent than the last time data was captured is considered to have changed.

Enter the name of the columns that contain the time of the last change.



This attribute is reserved for future use.

 Slowly Changing Dimension: Dimension is a logical grouping of data such as customer or product information. With Slowly Changing Dimension (SCD), data changes slowly, rather than changing on a time-based, regular schedule.

For example, assume you have a dimension that tracks the sales from each salesman for each region.

If a Salesman moves to a different region at the end of a month, what happens to the sales data from the next month? Should all the data (including historical data) for the salesman be reflected in the new region? Slowly Changing Dimension takes care of these situations.

Type 1 - This option overwrites all old data with the new. Historical data is not preserved.

Type 2 - This option preserves historical data by creating multiple records for a given natural key in the dimensional tables with separate surrogate keys and different version numbers.

Enter the surrogate key for type 1, along with the start and end fields for which the SCD is valid.



This attribute is reserved for future use.

Static Cache: For increased performance, you can cache in memory, tables (data sources) that rarely change.

Marking a data source as Static Cache causes its entities to be cached in memory.

Some examples of data sources that can be cached are a table of zip codes and the periodic table.

4. Table Security: Enter the names of the users who are allowed to view this table. User names can be separated by spaces, tabs or new lines.



By default (leaving this blank), all users are allowed to view this table.



You can also set Column level as well as Row level security by selecting the Security Transform. For detailed information on transform categories, refer to the Elixir Transform User Manual.

For JDBC and Stave Universes, you can set the Column level and Row level security, from within the **Column Attributes** tab. See the following Column Attributes section for more information.

#### **Column Attributes**

This section allows you to set attributes for a single column in the table. You can enumerate values, set the format for display, set the column as a primary key or as a foreign key, and set the column values to be in a defined range.

The various column attributes are shown in Figure 5.8, "Setting Column Attributes".

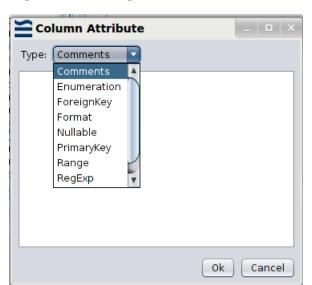


Figure 5.8. Setting Column Attributes

The following are the various column attributes:

- 1. Comments: Add any comments that you desire, for your own understanding. These comments are not displayed in the Ad Hoc report or dashboard when published.
- 2. Enumeration: By defining the attributes of individual fields, the system can validate the record values using the cleansing process. For example, you might specify that the field "Gender" is a nominal enumeration of "M" and "F". The cleansing process would then warn you of any records containing "m" or "Female".

Ordinal enumeration attributes allow you to specify the order in which to display data, while retaining the original order. For example, you might specify that the field "Fruit" is an ordinal enumeration of "Apple" and "Orange". Only "Apple" and "Orange" records can pass the validation in cleansing process.

3. Foreign Key: A foreign key is a field (or collection of fields) in one table that uniquely identifies a row of another table. Enter the name of the referenced table and the name of the referenced column.

In case of a compound foreign key where the foreign key is made up of two or more columns, the sequence number defines the order of the columns that make up the key.

- 4. Format: Enter the format of the data in this column.
- 5. Nullable: Specify whether the data can be Null values.
- 6. Primary Key: A Primary Key is necessary for all tables in the Repository Universe. Ensure that each table has a unique Primary Key column. This is important for Ad-Hoc Dashboard. For most cases, a table has only one Primary Key, therefore the sequence number is 0.

If you are working on a datasource without an obvious Primary Key - for example - Fruit-Sales.ds, add a Sequence Transform to create a new ID column, and add a Column Attribute to mark it as a Primary Key. Since FruitSales.ds uses a composite Primary Key, an alternative approach is to add a Column Attribute to mark Company as PrimaryKey: 0, and add another Column Attribute to mark Fruit as PrimaryKey: 1.

- 7. Range: Specify the start value and end value for the data in the column.
- 8. RegExp: Define and test the regular expression syntax.

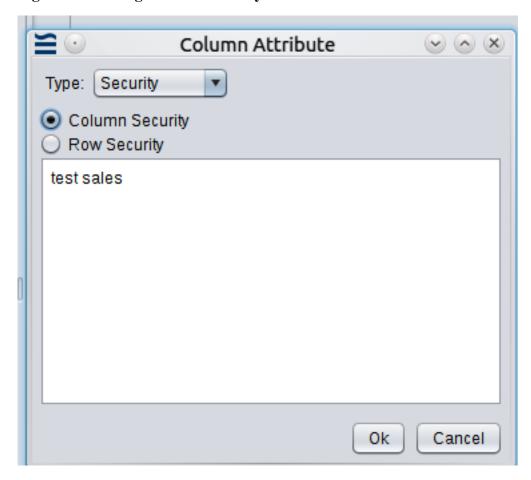
Either enter the regular expression, or select from the list. This helps ensure that the data is correctly entered, before processing.

9. Security (Only applicable for JDBC and Stave Universes): Allows you to set the Column level and Row level security, for JDBC and Stave Universes.

Enter the names of users and groups who are granted the right to view the column or row data. User names can be separated by spaces, tabs or new lines.

An example of setting Column security is shown in Figure 5.9, "Setting Column Security".

Figure 5.9. Setting Column Security



Note the following points when setting up Column or Row security.

- If you do not set up security, all users are allowed to view the column or row data.
- Make sure that the users or groups to whom you grant access, have at least the SignIn, Adhoc Report View and Adhoc Dashboard View permissions.
- The users or groups also need access to the JDBC or Stave Universe.

The following is a demonstration of column security:

- a. Create either a JDBC Cars Universe or a Stave Cars Universe. Row and Column security do NOT work with Repository Universe yet.
- b. Add some new users and groups as follows:
  - Users: test2, WY
  - · Groups: CA
- c. Make user test2 a member of the group CA.
- d. Ensure that users admin, test, test2 and WY have the following privileges:
  - SignIn privileges
  - Adhoc Report View and Adhoc Dashboard View privileges
  - Access to the JDBC or Stave Universe

- e. Sign in to Ambience as user admin.
- f. Create an Adhoc Report in /Public with a Table band that contains these columns: (all from Cars table) city, dealer\_name, sales\_type and state.
- g. You will be able to view all columns as selected.
- h. Next, open up Designer, edit the Universe, and set the column security for the sales\_type column to test2.
- i. Save the Universe.
- j. Now from Ambience as admin, refresh your report. You will not be able to view the values in sales\_type column as they are hidden since you do not have the permission to view this column.
- k. Log out of Ambience as admin and log back in as user test2. You should now be able to view all columns in the report (including the sales\_type) column.

The above procedure demonstrates column security. You can only view the columns that are protected, if you are a user who has the access privilege set in the column security settings. The whole column is protected based on username + groups.

The following procedure demonstrates row security.

For this demo, we use the same Universe, report, users and groups and their privileges as in the column security demo.

- a. Remove the column security restriction set earlier in the column security demo.
- Open Designer, edit the Universe and set the row security for the state column to the word: test.
- c. Save the Universe.
- d. Open Ambience and try logging in as the following users to view the report:
  - test -> can view all the rows in the table.
  - WY -> can view only the state=WY rows in the table.
  - test2 -> can view only the state=CA rows in the table (because test2 is a member of the CA group.)
  - admin -> cannot view any rows in the table (no state matches the word admin).

A user can belong to multiple groups - for example test2 could be made a member of the CA and AK groups and see both sets of records.

The above procedure demonstrates row security. Rows are removed based on access rights + field value.

To set an attribute for a column:

- 1. Click a column from the Schema.
- 2. Click the Column Attributes tab.
- 3. Click the Add Attribute icon ( ).
- 4. Select the Attribute type.

- 5. Enter the parameters as appropriate.
- 6. Click **OK** to save the attribute.

#### **Adding Transforms**

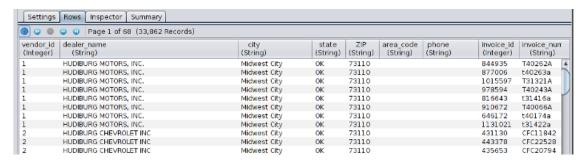
The Transforms tab enables you to create and edit transforms to a schema. Click the Add icon ( ), to invoke the Transform Wizard. For detailed information on transform categories, refer to the Elixir Transform User Manual.

#### Rows

The Rows tab displays either the original data of a table, or the output of column data if there are transforms created. Click the Load Data icon ( ) to display the rows.

An example Rows tab is shown in Figure 5.10, "Rows Tab".

Figure 5.10. Rows Tab



#### Inspector

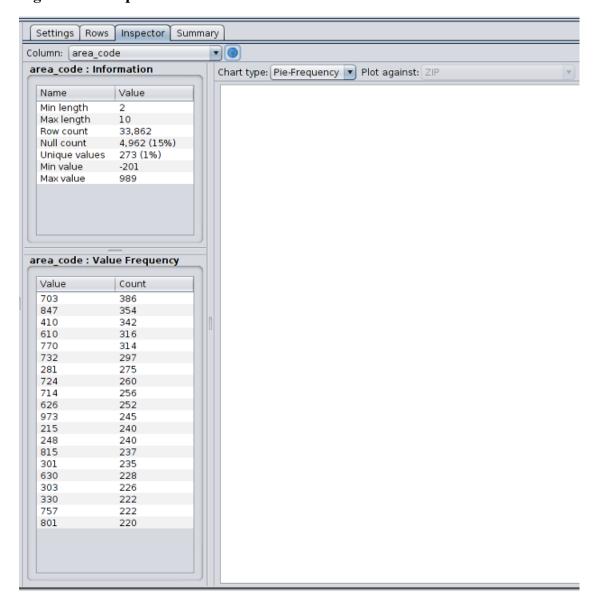
The Inspector tab enables you to review the contents of a column. It displays column information, value frequency based on the data type, as well as the chart type and plot.

Select the column to inspect and click the Load Data icon (



An example Inspector tab is shown in Figure 5.11, "Inspector Tab".

Figure 5.11. Inspector Tab

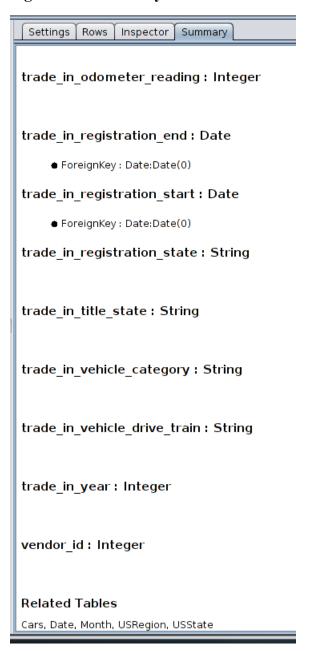


### **Summary**

The Summary tab displays the column names, data types and Primary and Foreign Key information.

An example Summary tab is shown in Figure 5.12, "Summary Tab".

Figure 5.12. Summary Tab

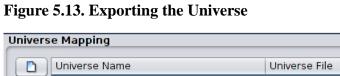


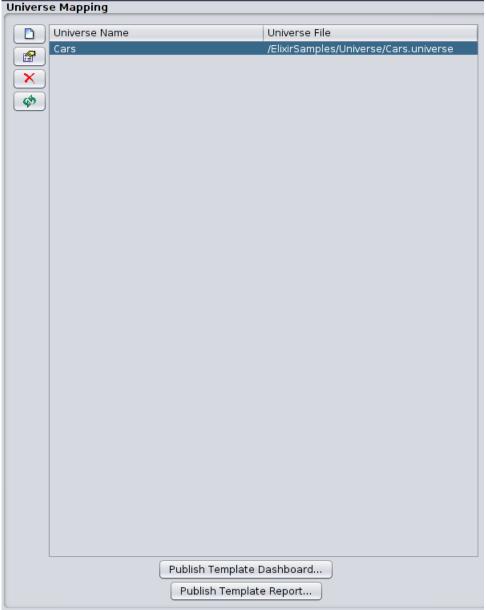
### **Exporting the Universe**

To export the Universe for use by Ad-Hoc Dashboard and Ad-Hoc Report:

1. Click the Admin Tools ( ) icon

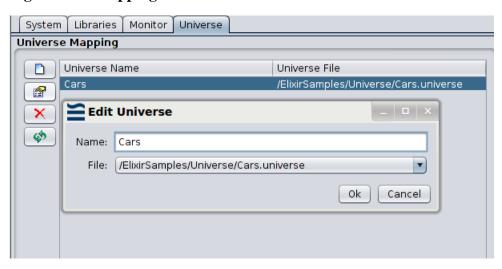
2. Select the Universe as shown in Figure 5.13, "Exporting the Universe".





Optionally, click the Edit [ ]) icon and enter your desired Universe name. The Universe is mapped with this name and can now be referred to in the Ad-Hoc Dashboard and Ad-Hoc Report applications. An example of mapping is shown in Figure 5.14, "Mapping the Universe"

Figure 5.14. Mapping the Universe



4. Click either **Publish Template Dashboard** or **Publish Template Report**, to save the Universe in a format suitable for use by Ad-Hoc Dashboard and Ad-Hoc Report respectively.

### **Setting the Universe Access Permissions**

By default, everyone can access the Universe provided it is saved in a publicly accessible folder, i.e. not in any User folder.

Optionally, to set restrict the users and groups who can access the Universe:

- 1. Click the Universe Access ( ) icon.
- 2. Select the Users and Groups who are allowed to access the Universe, as shown in Figure 5.15, "Setting the Universe Access Permissions".

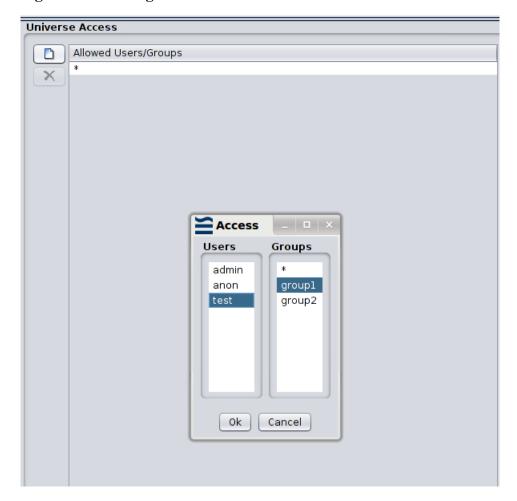


Figure 5.15. Setting the Universe Access Permissions

3. Click **OK** to save the access settings.

## **JDBC** Repository

A JDBC Universe allows data to be read from a relational database using a JDBC driver. If your data is defined in a relational database, and a JDBC driver is available, then JDBC Universe is recommended. Before getting started, add the JDBC driver into /opt/elixir/lib/, to make it available to all Java Virtual Machines.

Double click a JDBC universe from the folder tree to open it in the Universe Designer.

The Universe Designer displays as shown in Figure 5.16, "Universe Designer for a JDBC Universe":

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Figure 5.16. Universe Designer for a JDBC Universe

### **Configuring a Connection Pool**

JDBC allows access to data through SQL statements. To configure the connection pool, click the icon. For example, you can install MySQL Workbench and use com.mysql.jdbc.Driver for the JDBC Universe. Modify the host and database name in the URL field, enter the user name and password, and click Test Connection.

Figure 5.17. Configuring the Connection Pool



If the connection test succeeds, you have the option to define the Connection Pool Parameters on the next page. On the Connection Pool JDBC Properties page, you can set any customized properties for your JDBC driver by setting the keys and values. After you complete the settings, click **Finish**.

#### **Adding Tables**

Click the Add Tables icon. Tables from the relational datasource will display in the Add Tables window. You can choose from these tables, or invert your selection. Click **OK**.

The tables are joined automatically. You can create custom tables by using expressions.

#### **Pasting Tables**

Click the Paste icon to copy tables from another JDBC Universe and paste them here.

#### **Viewing SQL**

Click the SQL tab. This displays the SQL that will be executed for the table. Click the Load Data icon to load the table contents.

#### **Other Actions**

All other actions that you can perform on a JDBC Universe are the same as in the section called "Repository Universe"

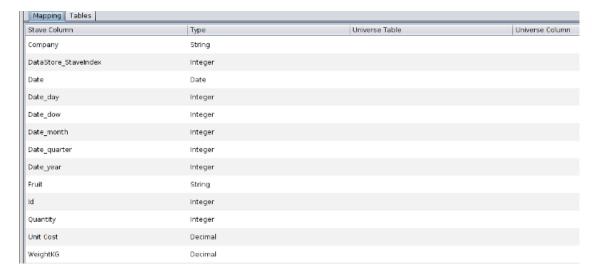
## **Stave Repository**

Stave is a column based repository. Data is stored in columns. Stave offers better data compression, and extremely fast data retrieval.

Double click a Stave Universe from the folder tree to open it in the Universe Designer.

The Universe Designer displays as shown in Figure 5.18, "Universe Designer for a Stave Universe":

Figure 5.18. Universe Designer for a Stave Universe

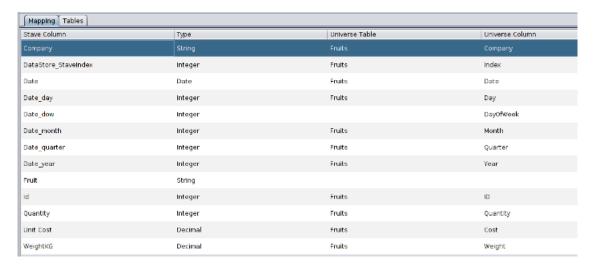


#### **Mapping Stave Columns to Logical Tables**

Before the Stave columns can be used, you need to map them to a logical table.

Click the Mapping tab. For each row, enter a name for the Universe table and a name for the column as shown in Figure 5.19, "Table Mapping for a Stave Universe".

Figure 5.19. Table Mapping for a Stave Universe





Observe how Stave automatically names the Date columns once you enter a name for the Universe table for the column marked Date. This occurs since Date in Stave is internally represented as multiple rows, one each for Day, Day of Week, Month, Quarter and Year.



Similarly, Stave automatically names the Time columns once you enter a name for the Universe table for the column marked Time. This occurs since Time in Stave is internally represented as multiple rows, one each for Hour and Minute.

#### **Operations on Stave**

Once you finish Mapping, click the Tables tab. You will see the mapped Universe table as shown in Figure 5.20, "Mapped Table for a Stave Universe".

Mapping Tables Fruits Rows Inspector Settings Summary Schema Name Туре String Decimal Company Cost Date Date Integer Day ID Integer Month Quantity Integer Integer Quarter Weight Integer Decimal Integer Year Table Attributes Column Attributes Attributes Name Value 

Figure 5.20. Mapped Table for a Stave Universe

Click the table and proceed with the operations as specified in the section called "Repository Universe".