Appendix D

Source to Target Mapping Template

As the name implies, the Source to Target Mapping template maps the association of data from the source to target systems. This spreadsheet is referenced and modified throughout the requirements gathering, build, testing, and monitoring phases, perhaps serving as the most important deliverable for the team. Consequently, the goal of the Source to Target Mapping spreadsheet should be to supply enough transformation rules and technical decisions to readers without overwhelming them with details.

A quick Internet search will reveal many recommendations for the “best” Source to Target mapping template. I have identified in Table 1 the fields and associated definitions that have served me well for the majority of my projects, but yours may differ. Feel free to modify, add, or subtract where necessary, keeping in mind that we want to balance flexibility with comprehension and not go too far in either direction.

Table 1: Source to Target Mapping Fields and Definitions

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| Field | Definition |
| SourceDatasystem | Put the formal name for the system that is the data source. For example: "Mailing List," "Recruiting." |
| SourceTable | The physical name of the source table. For example: "CONTACT","PRODUCT". |
| SourceField | The physical name of the source field/column. For example: "ROWID", "FIRSTNAME". |
| SourceDataType | The data type for the Source data. For example: "VARCHAR(30)", "DATETIME(mm/dd/yyyy)", "NUMBER"). |
| TargetDatasystem | Put the formal name for the system that is the data target. For example: "Salesforce," "DataWarehouse." |
| TargetTable | The physical name of the target table. For example: "MERCHANDISE\_\_C","ACCOUNT". |
| TargetField | The physical name of the target field/column. For example: "ROWID", "FIRSTNAME". |
| TargetDataType | The data type for the Target data. For example: "STRING", "REFERENCE", "NUMBER") |
| TransformationRule | Enter the high-level business rules required for tranforming the data from source to target. For example: "Join constituent.contact\_id on constituent\_add.rowid where address.primary\_address = TRUE and address.valid=TRUE". |
| PicklistValues | Insert related picklist values, especially if customized. For example, "Freshman, Sophomore, Junior, Senior," "Small, Medium, Large." |
| DesignNotes | Use this field to provide additional design notes that are not necessarily part of the transformation rules. For example: "Values for this field are not case sensitive and should be reviewed before import," "Trim those values that exceed the maximum datatype for this field.". |
| DateCreated | Insert the initial date this field was added to the model. For example: "12/1/2019". |
| DateLastUpdated | Insert the date this field mapping was modified. For example: "12/22/2019". |
| OpenIssues | Insert any open issues encountered during development. For example: "We are missing several row identifiers in the join", "What should we do with fields that go over 80 characters?". |
| Assumption | Describe the workaround/assumption for the open issues. For example: "Ignore all joins where the ID does not match", "Trim fields at 80 characters.". |
| AssumptionApproved | List whether the assumption was approved and who approved it. If NOT approved, list the workaround specified. For example: "Assumption approved by J. Smith," "Workaround should be to omit all records where field > 80 characters--S. Brown". |
| ResolutionCloseDate | Insert the date the resolution was deemed as closed. For example: "12/08/2019". |
| FollowUpRequired | Indicate whether this data needs follow-up. During a filter, this will help guide conversations. For example: "YES," "NO." |