



## **erwin DI Business User Portal**

### **Data Literacy Guide**

**Release v10.1**

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### Accessing Technical Support

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- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
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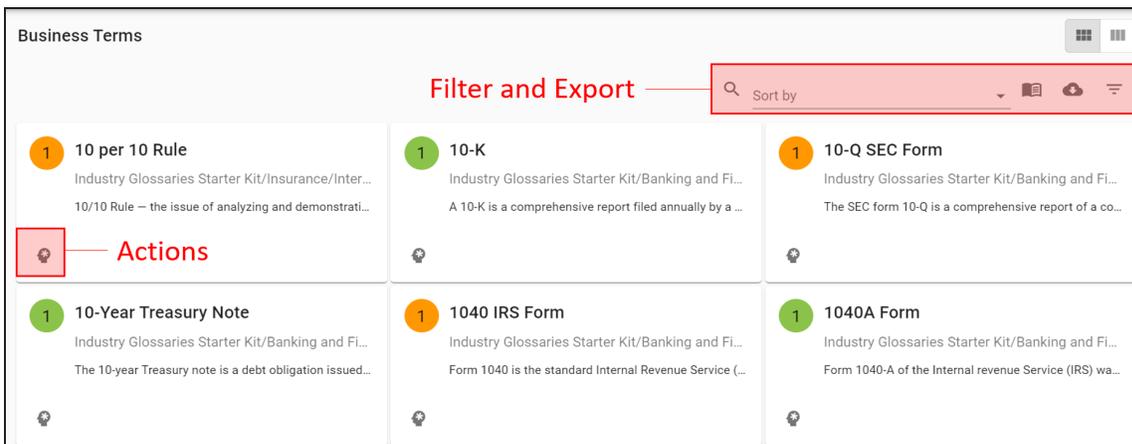
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# Business Glossary

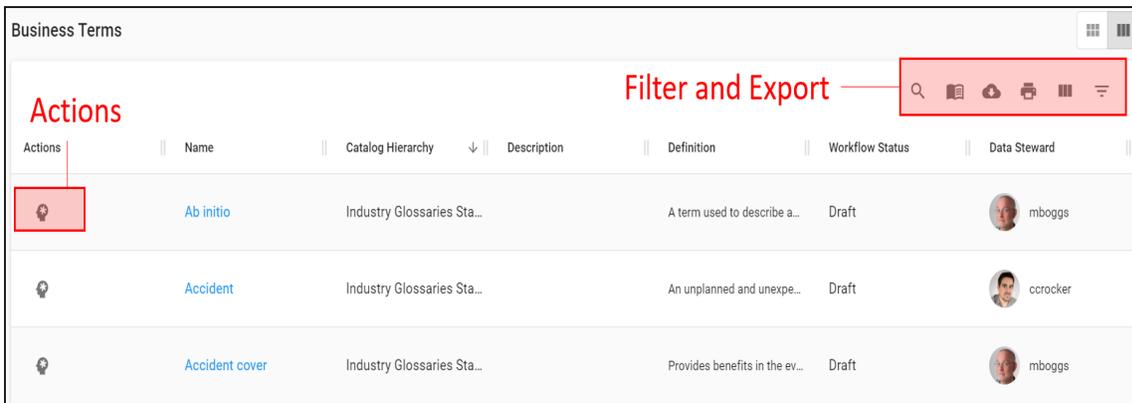
By default, erwin Data Intelligence Suite (DI Suite) has three types of business assets, business terms, business policies, and business rules. You can view these business assets in erwin DI Business User Portal (BUP) under Business Terms, Business Policies, and Business Rules. Asset types, defined in erwin DI Suite, other than the default business assets can be accessed under Custom Assets.

To view business assets, on the menu, click <Business\_Asset>.

By default, <Business\_Asset> card view appears.



To access the <Business\_Asset> in grid view, click .



To view mind map of business assets, click  under the Actions section.

Refer to the following table for descriptions of options under the Filters and Export section.

Options	Description
	Use this option to search the required assets.
Sort by	Use this option to sort assets in alphabetical or reverse alphabetical order based on Catalog Hierarchy, Data Steward, Definition, Description, Name, and Workflow Status.  This option is available only in the card view.
	Use this option to filter a list of assets based on Catalogs.
	Use this option to download a list of assets in the XLSX format.
	Use this option to filter list of assets based on the available options.
	Use this option to print a list of assets. This option is available only in the grid view.
	Use this option to select columns that you want to show in a grid. By default, all the columns are selected.

You can analyze business glossary details by further drilling down the following business assets:

- [Business Terms](#)
- [Business Policies](#)
- [Business Rules](#)
- [Custom Assets](#)

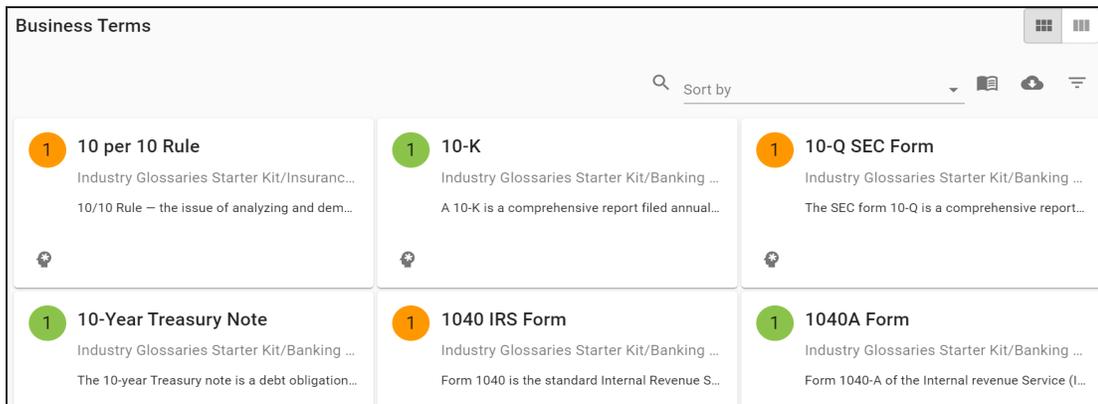
## Business Terms

erwin DI Business User Portal (BUP) gives you access to view a business term's details, associations, valid values, and mind map. You can view a list of all the business terms and navigate through the list using advance filtering mechanisms to find the required business term. You can also analyze miscellaneous and extended properties of a business term.

To view Business Terms in grid view, follow these steps:

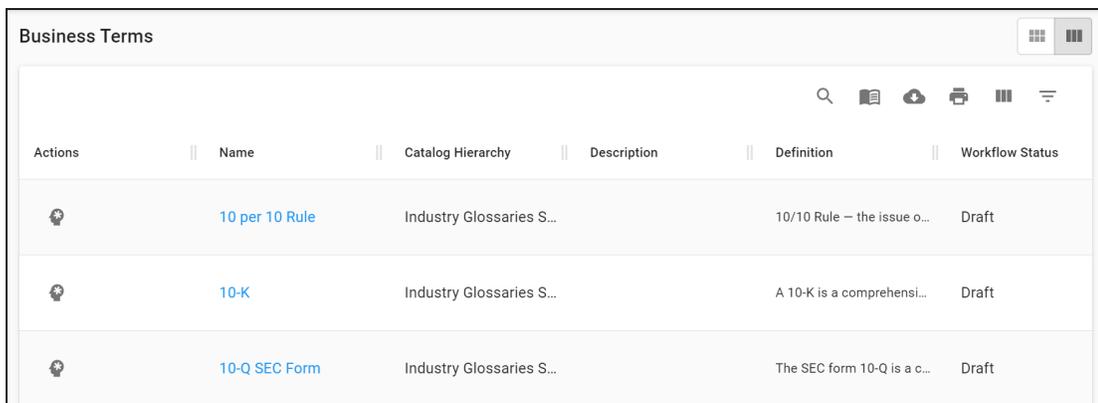
1. On the menu, click **Business Terms**.

By default, the Business Terms card view appears.



2. Click .

The Business Terms page appears. It displays a list of business terms.



You can use the filter and export options to work on the list. For more information on the filter and export options refer to the [Business Glossary](#) topic.

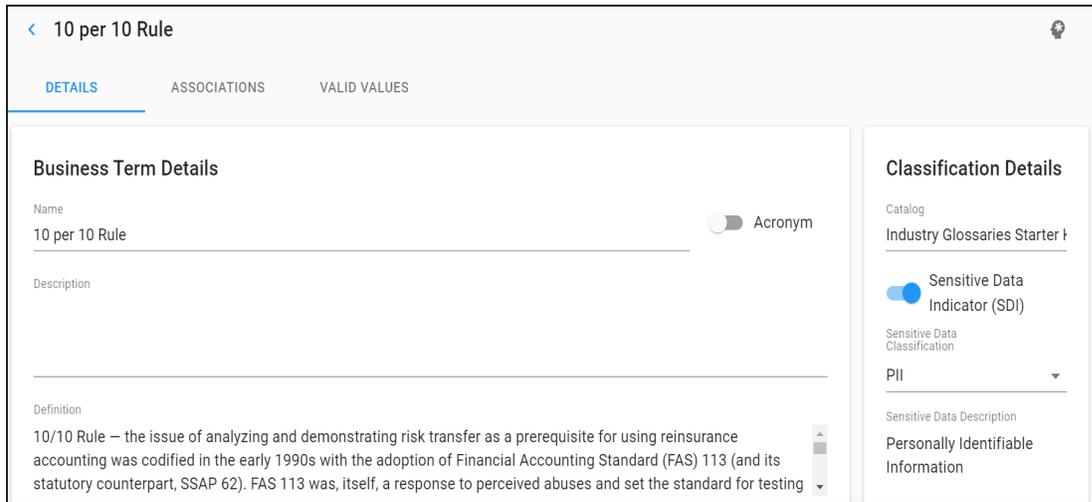
To view mind maps of business terms, click . For more information on mind maps, refer to the [Mind Maps](#) topic.

## Business Term Details

Business term details shows a business term's name, description, definition, and whether it is an acronym.

To view business term details, in the **Business Terms** grid, click <Business\_Term\_Name>.

The <Business\_Term\_Name> page appears. The Details tab displays the Business Term Details and Classification Details sections. You can scroll down the page to view User Defined Properties, Miscellaneous Details, and Extended Properties sections.



## Associations

A business term may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of business terms, on the <Business\_Term\_Name> page, click the **Associations** tab.

The list of associated assets appears. You can click the <Asset\_Name> appearing as hyper-link to view its details.

< 10 per 10 Rule

DETAILS ASSOCIATIONS VALID VALUES

Search, Print, Filter, Sort icons

Actions	Name	Type	Catalog Hierarchy	Relationship
	Acct_Prod_Source_Id	Column		Represents
	DM Staging	Environment		is associated with

You can use filter and export options to work on the list. For more information on filter and export options, refer to the [Business Glossary](#) topic.

To view association details, under the **Actions** column, click for the required asset.

The Association pane appears. It displays association details of the business term with the asset.

< 10 per 10 Rule

DETAILS ASSOCIATIONS VALID VALUES

Search, Print, Filter, Sort icons

Actions	Name	Type	Catalog Hierarchy
	Acct_Prod_Source_Id	Column	
	DM Staging	Environment	

Rows per page: 25 1-2 of 2

> Association

**Association Details**

Source Name  
10 per 10 Rule

---

Source Type  
Business Term

---

Relationship Name  
Represents

---

Target Name  
Acct\_Prod\_Source\_Id

---

Target Type  
Column

## Valid Values

You can view the assigned codesets to the business term as valid values.

To view the valid values of business terms, on the <Business\_Term\_Name> page, click the **Valid Values** tab.

DETAILS		ASSOCIATIONS		VALID VALUES	
Category Hierarchy	Codeset	Codeset Version	Code Name	Code Value	Code Description
erwinDISAccounts	erwinProdAccounts	1.00	1005	210	Permissible value for A
erwinDISAccounts	erwinProdAccounts	1.00	1016	211	Permissible value for A
erwinDISAccounts	erwinProdAccounts	1.00	1016	212	Permissible value for A
erwinDISAccounts	erwinProdAccounts	1.00	1016	213	Permissible value for A

## Business Policies

erwin DI Business User Portal (BUP) gives you access to view a business policy's details, associations, and mind map. You can view a list of all the business policies and navigate through the list using advance filtering mechanisms to find the required business policy. You can also analyze miscellaneous and extended properties of a business policy.

To view Business Policies in grid view, follow these steps:

1. On the menu, click **Business Policies**.

By default, the Business Policies card view appears.

2. Click .

The Business Policies page appears. It displays a list of business policies.

Actions	Name	Catalog Hierarchy	Description	Definition	Workflow Status	Data Steward
	<a href="#">Customer Phone Poli...</a>	GDPR Policies	In cases where the reso...	Staff will assist custome...	Draft	wpetty
	<a href="#">Customer Policy</a>	GDPR Policies	The organization compli...	Compliance and relevant...	Draft	

You can use the filter and export options to work on the list. For more information on the filter and export options refer to the [Business Glossary](#) topic.

To view mind maps of business policies, click . For more information on mind maps, refer to the [Mind Maps](#) topic.

## Business Policy Details

Business policy details shows a business policy's name, description, and definition.

To view business policy details, in the **Business Policies** grid, click <Busines\_Policy\_Name>.

The <Business\_Policy\_Name> page appears. The Details tab displays the Business Policies Details and Classification Details sections. You can scroll down the page to view the User Defined Properties, Miscellaneous Details, and Extended Properties sections.

**Customer Phone Policy**

**DETAILS** ASSOCIATIONS

**Business Policy Details**

Name  
Customer Phone Policy

Description  
In cases where the resources are not sufficient to meet customer demand, staff will offer loan service or refer customers to other departments with more appropriate collections. Whenever possible staff will contact the agency to which a customer is being referred to insure that the information, material or equipment needed is available.

Definition  
Staff will assist customers on a first come, first served basis to the extent possible without infringing on the service needs of other customers.

**Classification Details**

Catalog  
GDPR Policies

Sensitive Data Indicator (SDI)

Sensitive Data Classification  
▼

Sensitive Data Description

## Associations

A business policy may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of business policies, on the <Business\_Policy\_Name> page, click the **Associations** tab.

The list of associated assets appears. You can click the <Asset\_Name> appearing as hyperlink to view its details.

Actions	Name	Type	Catalog Hierarchy	Relationship
	<a href="#">10 per 10 Rule</a>	Business Term	Industry Glossaries Starter Kit...	Governs
	<a href="#">Acct_Prod_Source_Id</a>	Column		is associated with

You can use the filter and export options to work on the list. For more information on the filter and export options refer to the [Business Glossary](#) topic.

To view association details, under the **Actions** column, click for the required asset.

The Association pane appears. It displays association details of the business policy with the

Actions	Name	Type	Catalog Hierarchy	Relationship
	<a href="#">10 per 10 Rule</a>	Business Term	Industry Glossaries S...	Governs
	<a href="#">Acct_Prod_Source_Id</a>	Column		is associated with

**Association**

**Association Details**

Source Name  
Customer Phone Policy

---

Source Type  
Business Policy

---

Relationship Name  
Governs

---

Target Name  
10 per 10 Rule

---

Target Type  
Business Term

asset.

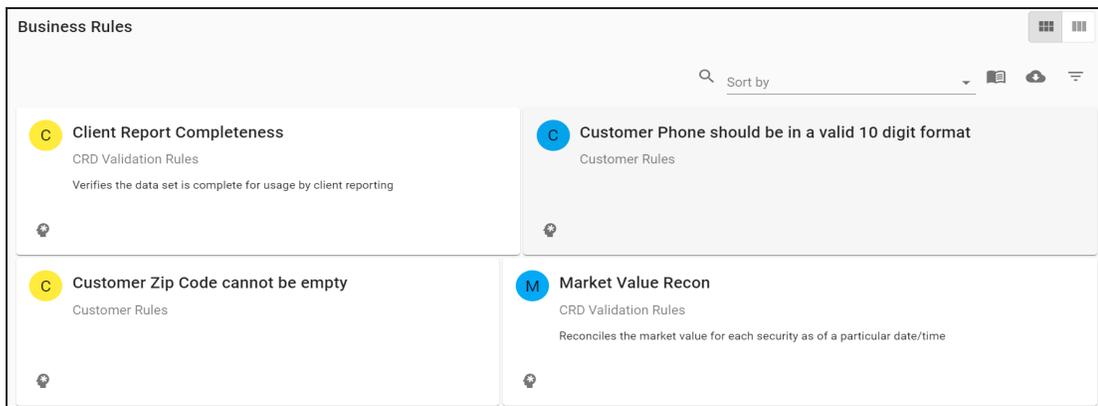
# Business Rules

erwin DI Business User Portal (BUP) gives you access to view a business rule's details, associations, and mind map. You can view a list of all the business rules and navigate through the list using advance filtering mechanisms to find the required business rule. You can also analyze miscellaneous and extended properties of a business rule.

To view Business Rules in grid view, follow these steps:

1. On the menu, click **Business Rules**.

By default, the Business Rules card view appears.



2. Click .

The Business Rules page appears. It displays a list of business rules.

Actions	Name	Catalog Hierarchy	Description	Definition	Workflow Status	Data Steward
	<a href="#">Client Report Comple...</a>	CRD Validation Rules		Verifies the data set is c...	Draft	
	<a href="#">Customer Phone sho...</a>	Customer Rules		Reconciles the market v...	Draft	
	<a href="#">Customer Zip Code c...</a>	Customer Rules		Verifies the price has no...	Draft	

You can use the filter and export options to work on the list. For more information on the filter and export options refer to the [Business Glossary](#) topic.

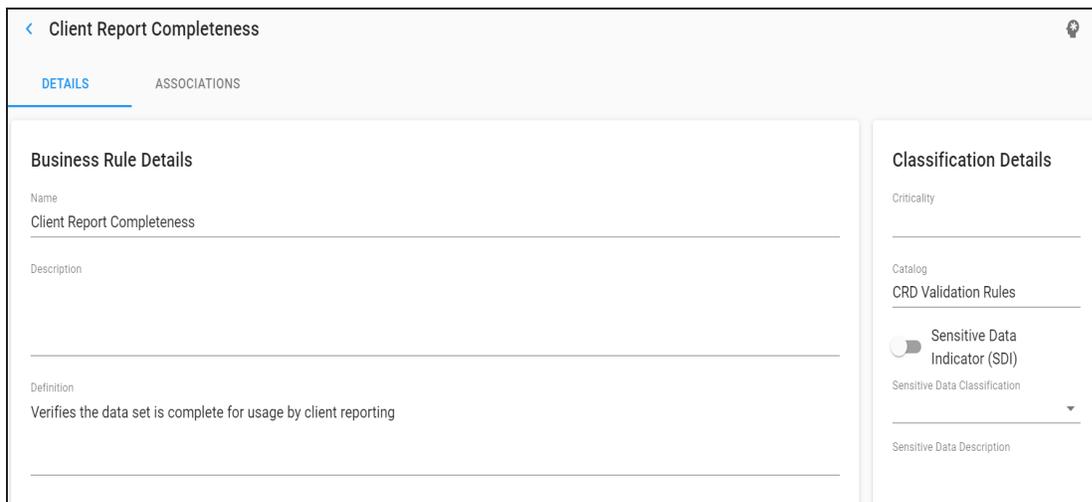
To view mind maps of business rules, click . For more information on mind maps, refer to the [Mind Maps](#) topic.

## Business Rule Details

Business rule details shows a business rule's name, description, and definition.

To view business rule details, in the **Business Rules** grid, click <Business\_Rule\_Name>.

The <Business\_Rule\_Name> page appears. The Details tab displays the Business Rules Details and Classification Details sections. You can scroll down the page to view User Defined Properties, Miscellaneous Details, and Extended Properties sections.



## Associations

A business rule may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of business rules, on the <Business\_Rule\_Name> page, click the **Associations** tab.

The list of associated assets appears. You can click the <Asset\_Name> appearing as hyper-link to view its details.

Actions	Name	Type	Catalog Hierarchy	Relationship
	<a href="#">10 per 10 Rule</a>	Business Term	Industry Glossaries Starter Kit...	is associated with
	<a href="#">Account</a>	Table		is related with

You can use the filter and export options to work on the list. For more information on the filter and export options refer to the [Business Glossary](#) topic.

To view association details, under the **Actions** column, click for the required asset.

The Association pane appears. It displays association details of the business rule with the asset.

Actions	Name	Type	Catalog Hierarchy	Relationship
	<a href="#">10 per 10 Rule</a>	Business Term	Industry Glossaries S...	is associated with
	<a href="#">Account</a>	Table		is related with

> Association

**Association Details**

Source Name  
Client Report Completeness

---

Source Type  
**Business Rule**

---

Relationship Name  
is associated with

---

Target Name  
**10 per 10 Rule**

---

Target Type  
**Business Term**

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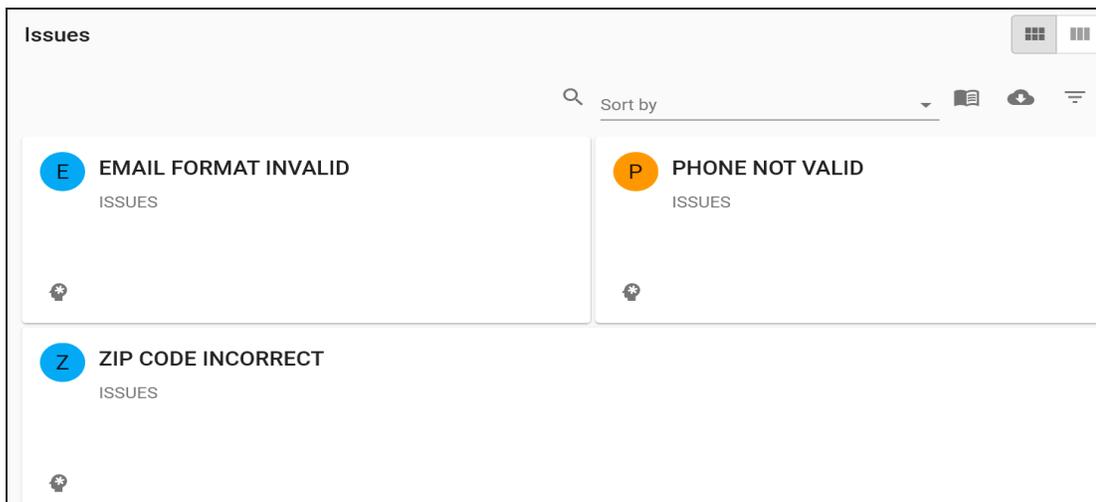
## Custom Assets

erwin DI Business User Portal (BUP) gives you access to view a custom object's details, associations, and mind map. The <Asset\_Type\_Name> grid displays the custom objects under it and you can easily navigate through the grid using advance filtering mechanisms to find the required custom object. You can also analyze miscellaneous and extended properties of a custom object.

To access the <Asset\_Type\_Name> grid, follow these steps:

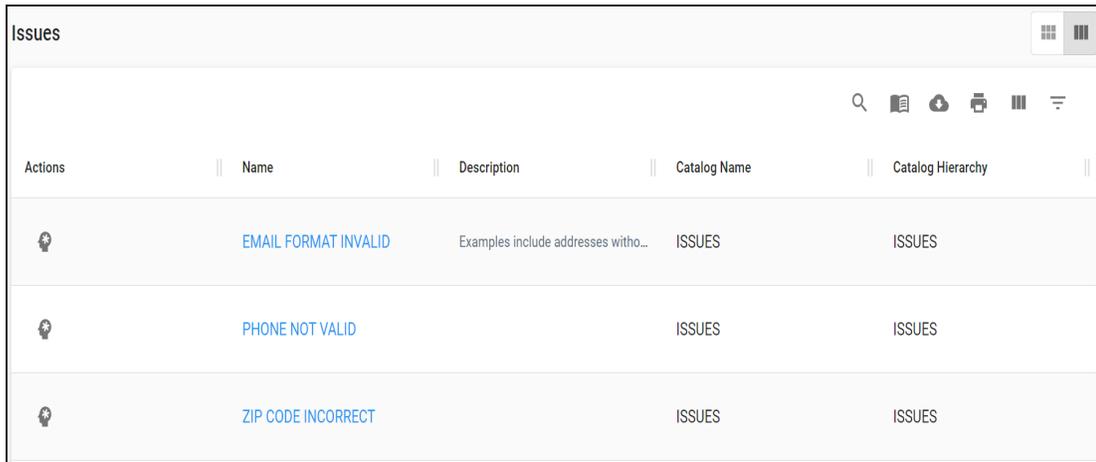
1. In the menu, expand the **Custom Assets** node.
2. Click <Asset\_Type\_Name>.

By default, the <Asset\_Type\_Name> card view appears.



3. Click

The <Asset\_Type\_Name> grid appears.



Actions	Name	Description	Catalog Name	Catalog Hierarchy
	<a href="#">EMAIL FORMAT INVALID</a>	Examples include addresses witho...	ISSUES	ISSUES
	<a href="#">PHONE NOT VALID</a>		ISSUES	ISSUES
	<a href="#">ZIP CODE INCORRECT</a>		ISSUES	ISSUES

You can use the filter and export options to work on the grid. For more information on the filter and export options refer to the [Business Glossary](#) topic.

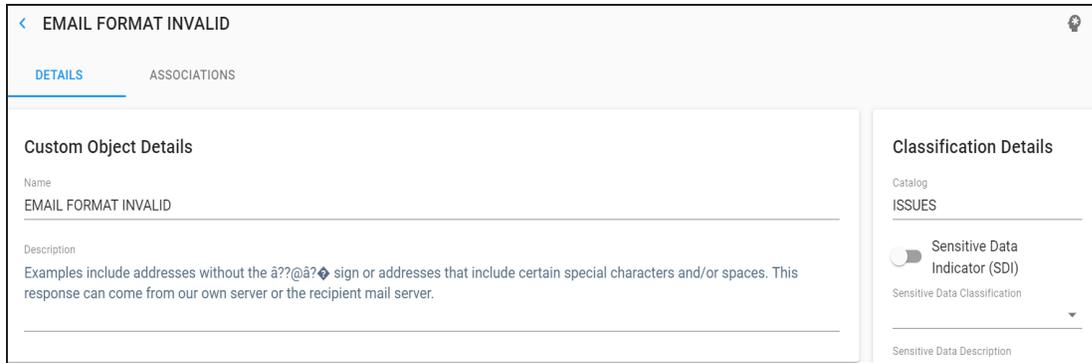
To view mind maps of custom objects, click . For more information on mind maps, refer to the [Mind Maps](#) topic.

## Custom Object Details

Custom object details shows a custom object's name, description, and definition.

To view custom object details, in the **Asset\_Type\_Name** grid, click <Custom\_Object\_Name>.

The <Custom\_Object\_Name> page appears. The Details tab displays the Custom Object Details and Classification Details section. You can scroll down the page to view the Extended Properties section.

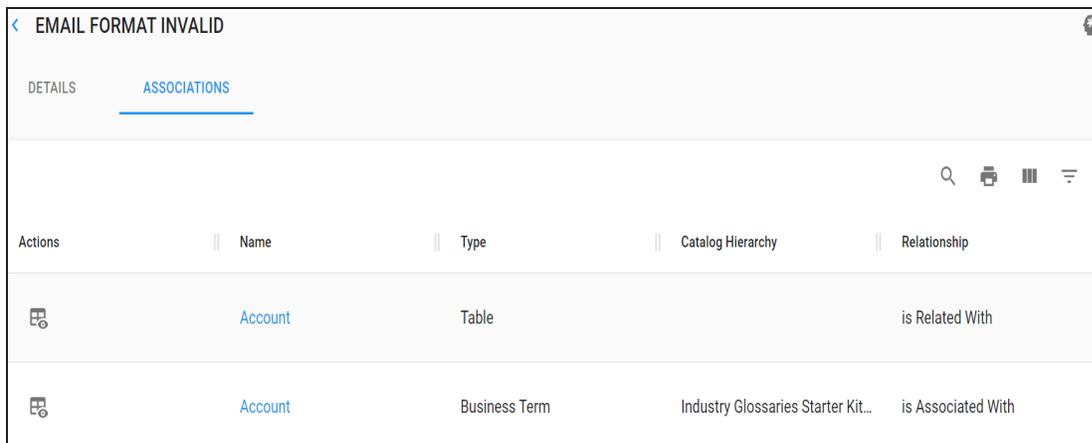


## Associations

A custom object may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of custom objects, on the <Custom\_Object\_Name> page, click the **Associations** tab.

The list of associated assets appears. You can click the <Asset\_Name> appearing as hyperlink to view its details.



You can use the filter and export options to work on the grid. For more information on the filter and export options refer to the [Business Glossary](#) topic.

To view association details, under the **Actions** column, click for the required asset.

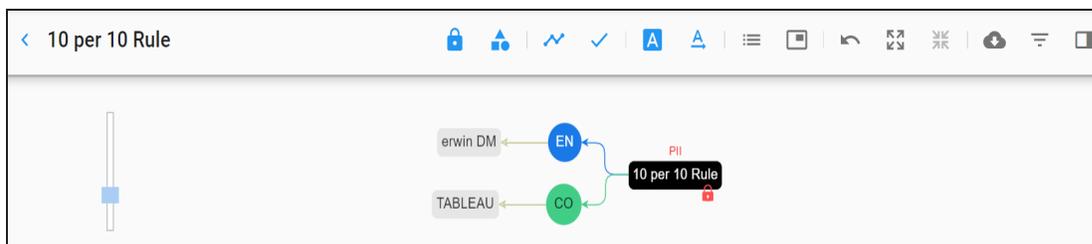
The association details of the custom object with the asset appears.

Actions	Name	Type	Catalog Hierarchy	Relationship
	Account	Table		is Related With
	Account	Business Term	Industry Glossaries S...	is Associated With

## Mind Maps

A mind map is a pictorial representation of associated assets. You can view sensitivity of assets, logical and expanded logical name of tables and columns, and relationships between the assets. It is also possible to use filter to view more focused mind map based on asset types and relationships.

To view mind map of business assets, in the <Business\_Asset> grid, click

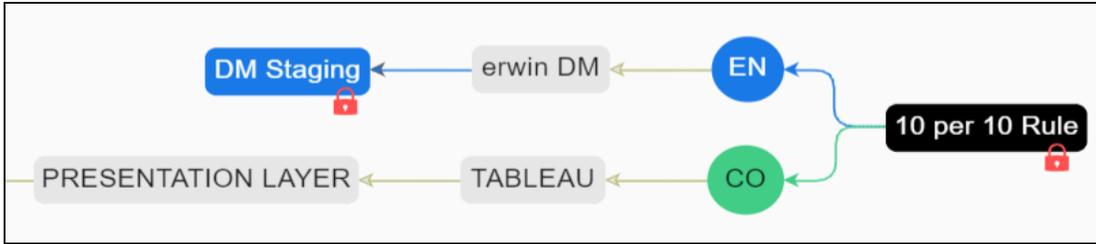


Use the following options to work on the mind map

### View Sensitivity Data Indicator

Switch **View Sensitivity Data Indicator** to to view sensitive data indicator of assets on the mind map.

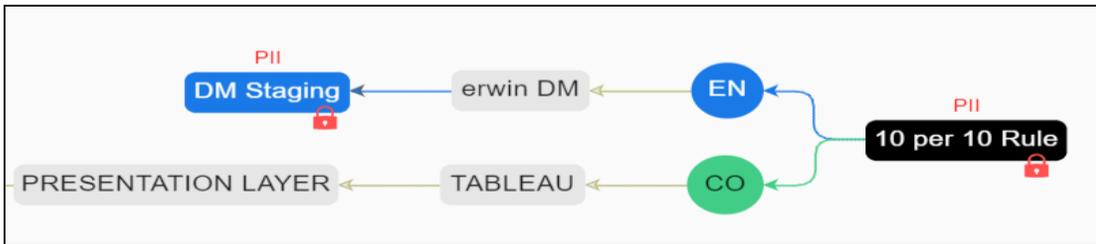
For example, the following mind map displays the sensitivity data indicator as sensitive () for the 10 per 10 Rule business term.



### View Sensitivity Data Classification (🔒)

Switch **View Sensitivity Data Classification** to 🔒 to view sensitivity data classification of assets on the mind map.

For example, the following mind map displays sensitivity data classifications of assets as PII (Personally Identifiable Information).



### Switch to Enterprise Relationship Configuration (📈)

Switch **Switch to Enterprise Relationship Configuration** to 📈 to view enterprise relationship configuration. The enterprise relationship configuration refer to the line color and type as configured in the Business Glossary Manager.

For example, the following mind map displays the relationship between business term and column in blue color and Zig Zag type display.

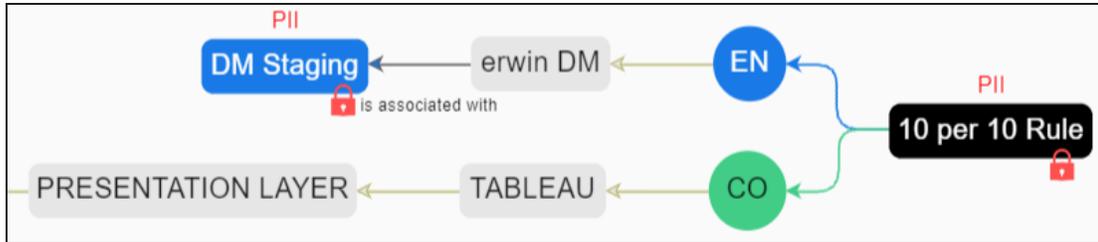


### Include Relationships (✓)

Switch **Include Relationships** to

✓ to view relationships between assets on the mind map.

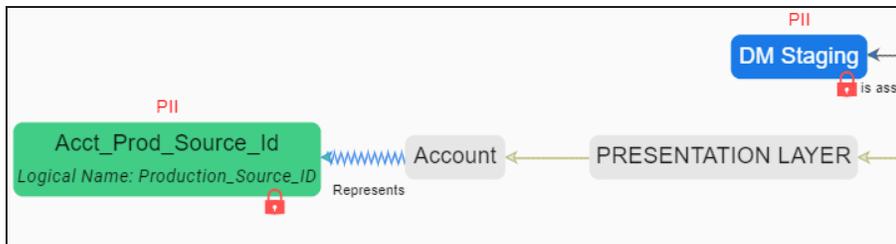
For example, the following mind map displays the relationships between an environment and business term (is associated with).



### Logical Names (A)

Switch **Logical Names** to **A** to view logical names of associated tables and columns on the mind map.

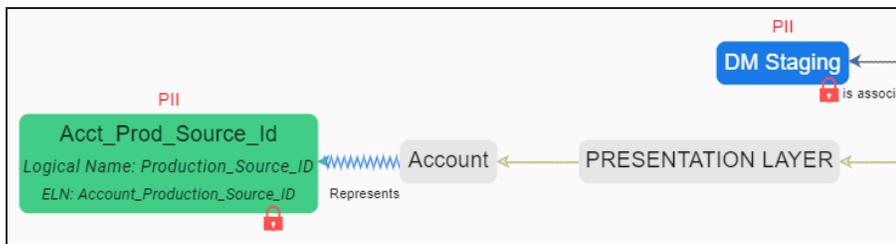
For example, the following mind map displays a column's logical name.



### Expanded Object Logical Names (A)

Switch **Expanded Object Logical Names** to **A** to view expanded logical names of associated tables and columns on the mind map.

For example, the following mind map displays a column's expanded logical name.

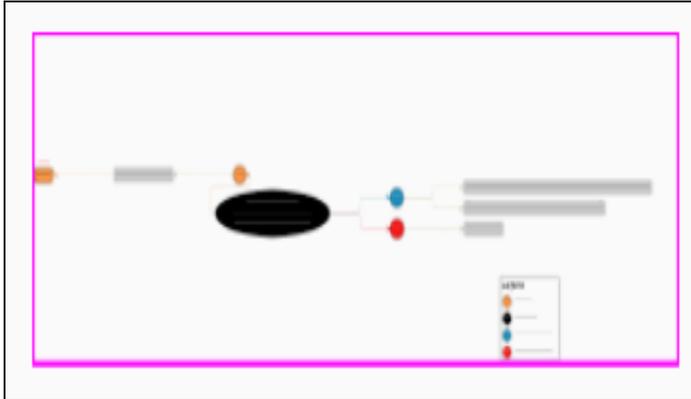


### Legend (≡)

Switch **Legend** to  to view legend of the mind map.

### Overview ()

Switch **Overview** to  to view the overview of the mind map. You can slide the purple box to navigate across the mind map.



### Expand All ()

Use this option to expand the nodes of the assets on the mind map.

### Collapse All ()

Use this option to collapse the nodes of the assets on the mind map.

### Export ()

Use this option to download the mind map in the XLSX or JPG format.

### Filter ()

Use this option to filter the mind map based on:

- Asset Type: You can exclude or include asset types from the mind map.
- Relationships: You can exclude or include assets based on relationships from the mind map.

### Properties

Click an asset on mind map to view its properties with association statistics under this pane. The properties of a technical asset differs from that of a business asset.