erwin DI Business User Portal

Metadata Guide

Release v10.1

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Review support maintenance programs and offerings.

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Access the erwin support site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for erwin DI Business User Portal (BUP), and includes the following:

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- Product and documentation downloads
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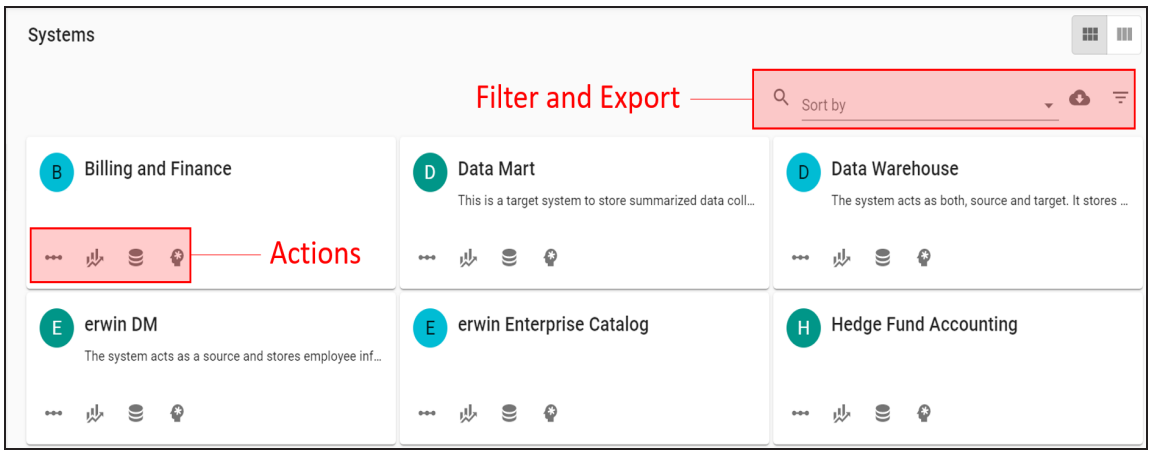
Metadata

erwin Data Intelligence Suite (DI Suite) stores the scanned or imported metadata in a hierarchy, System > Environment > Table > Column. Thus, systems, environments, tables, and columns constitute your technical assets. You can view the metadata stored in erwin DI Suite in a similar hierarchy in erwin DI Business User Portal (BUP).

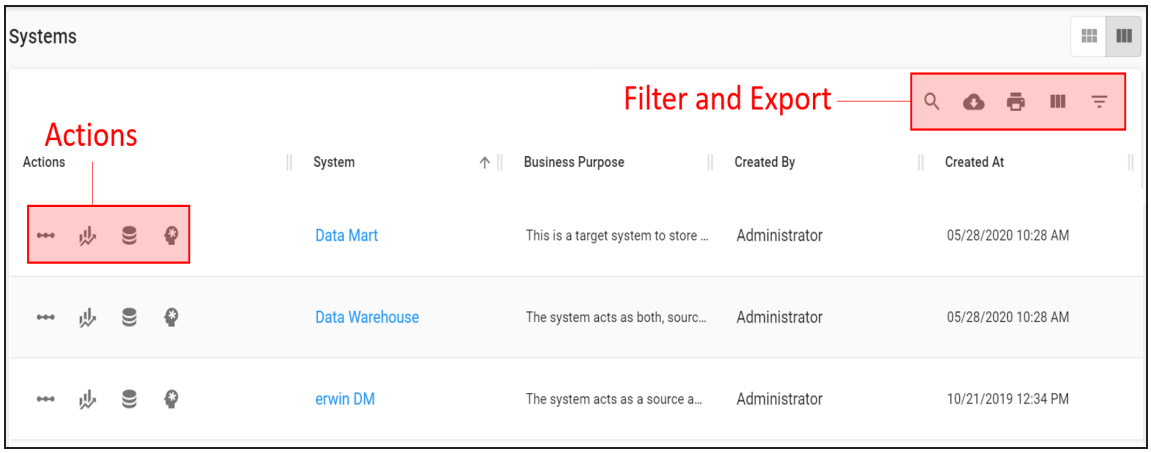
To access metadata, on the menu, expand the **Metadata** node and click <Technical_Asset>.

By default, the <Technical_Asset> card view appears.

Note: There is no card view for tables and columns. If you click Tables or Columns then the respective grid appears.



To access the <Technical_Asset> in grid view, click .



Refer to the following table for descriptions of options under the Actions section.

Options	Description
	Use this option to view lineage of a technical asset.
	Use this option to view impact analysis of a technical asset.
	Use this option to view environments under a system. This option is available only for Systems.
	Use this option to view mind map of a technical asset.
	Use this option to view tables under an environment. This option is available only for Environments.
	Use this option to view mappings of a technical asset. This option is available only for Columns and Tables.
	Use this option to view columns under a table. This option is available only for Tables.
	Use this option to view valid values of a column. This option is available only for Columns.

Refer to the following table for descriptions of options under the Filter 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. This option is available only in the card view.
	Use this option to download a list of assets in the XLSX format.
	Use this option to filter assets based on the available options.
	Use this option to print a list of assets.
	Use this option to select columns that you want to show in a grid. By default, all the columns are selected.

You can analyze metadata details by further drilling down the following technical assets:

- Systems
- Environments
- Tables
- Columns

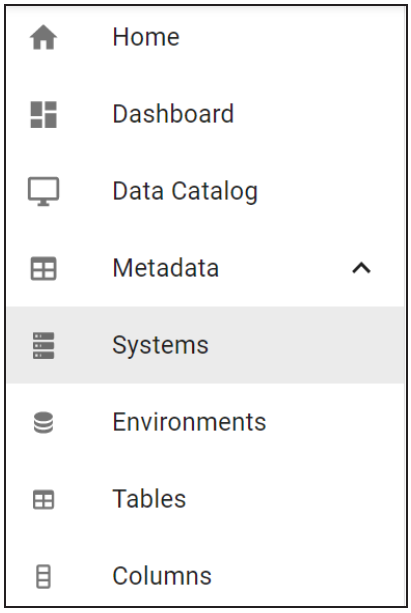
Systems

erwin DI Business User Portal (BUP) gives you access to view lineage, impact analysis, environments, mind map and associations of a system. You can view a list of all the systems and navigate through the list using advance filtering mechanisms to find the required system. You can also analyze technical details and extended properties of a system.

To view the Systems list in grid view, follow these steps:

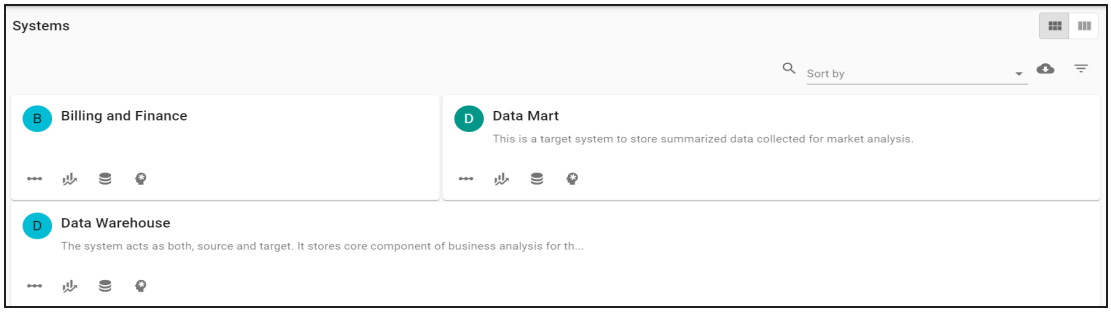
1. On the menu, expand the **Metadata** node.

   The Metadata node unfolds to display Systems, Environments, Tables, and Columns.



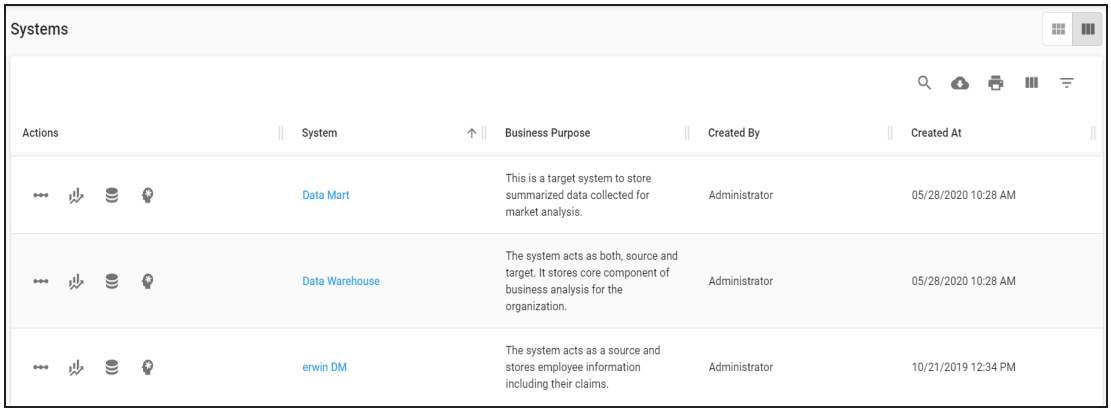
2. Click **Systems**.

   By default, the Systems card view appears.



3. Click .

   The Systems page appears. It displays a list of systems.



You can use the filter and export options to work on the Systems list. For more information on the filter and export options, refer to the Metadata topic.

You can drill down further and view a system's:

- Lineage
- Impact analysis
- Environments
- Mind maps

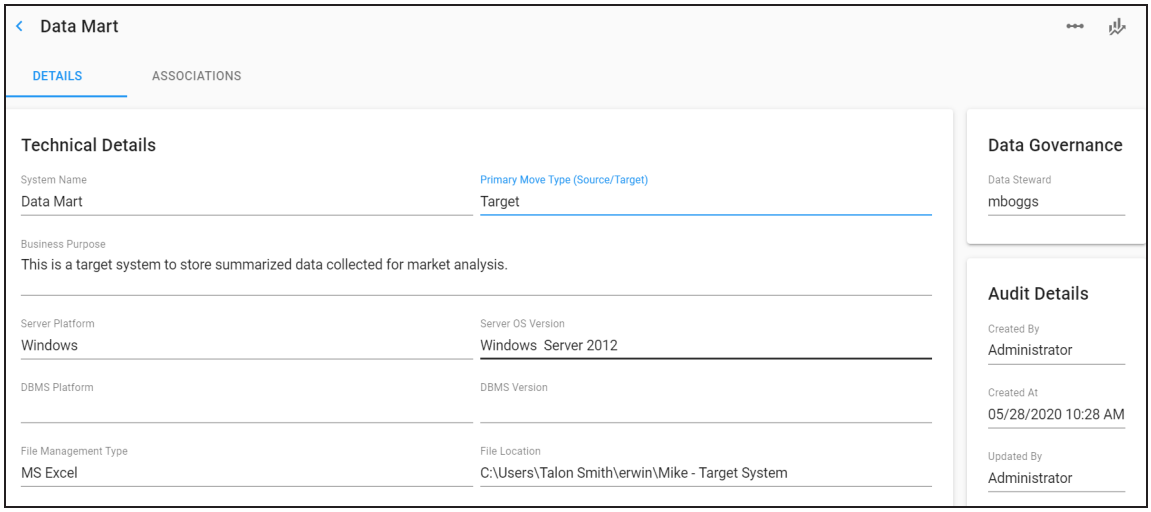
System Details

System details include data steward, business purpose, primary move type, server platform, server OS version of a system, and so on.

To view system details, in the **Systems** grid, click <System_Name>.

The <System_Name> page appears.

The Details tab displays the Technical Details, Data Governance, and Audit Details sections. You can scroll down the page to view the Extended Properties section.

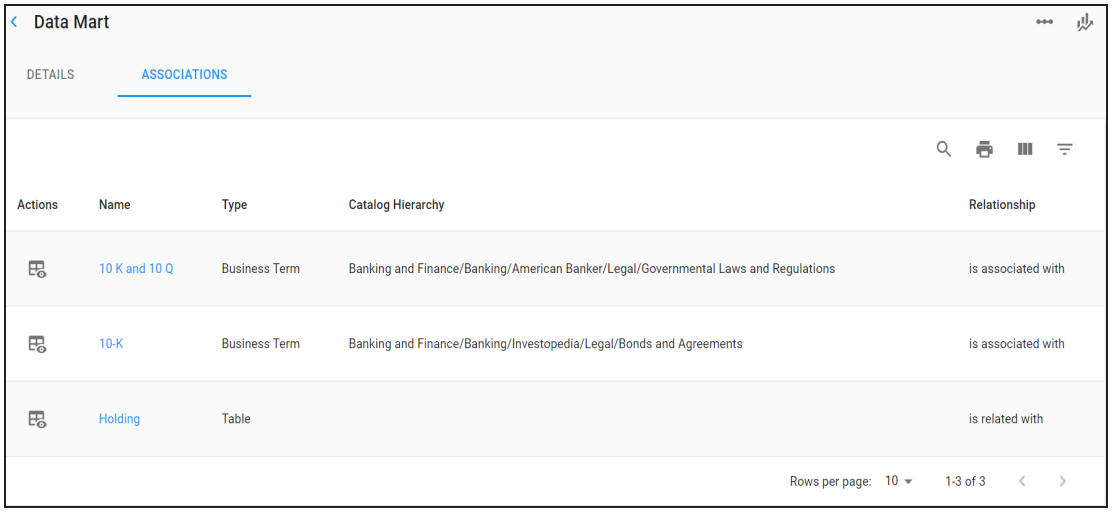


Associations

A system 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 systems, on the <System_Name> page, click **Associations**.

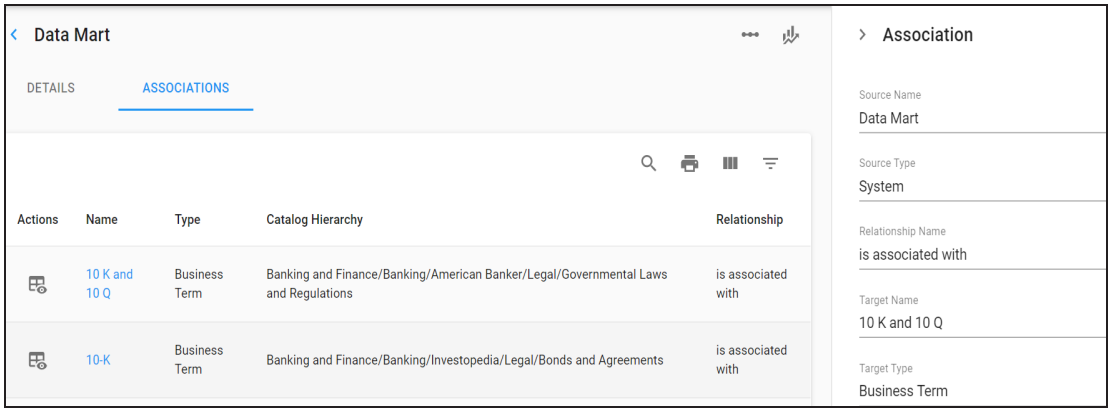
The list of associated assets appears. You can click the <Asset_Name> appearing as hyper-link to view its details.



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 Metadata topic.

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

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

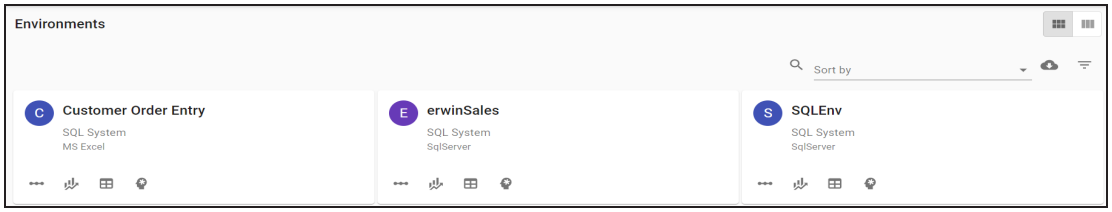


Environments

You can view list of environments in a system and access environment details that includes environment type, DBMS name, IP Address, and port. You can drill down further to view lineage, impact analysis, tables, and mind map of an environment.

To view environments in systems, in the **Systems** grid, click for the required system.

By default, the Environments card view appears. You can click to view the Environments in grid view.



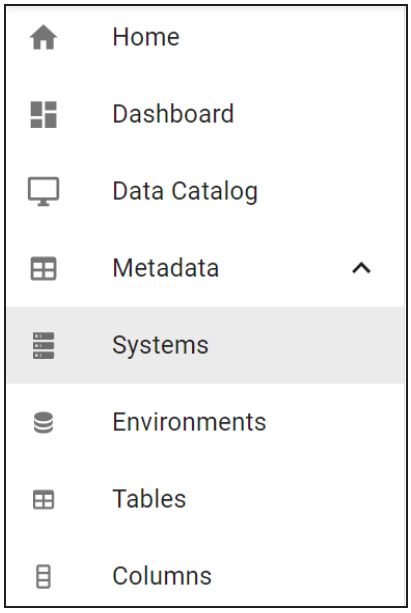
Environments

erwin DI Business User Portal (BUP) gives you access to view lineage, impact analysis, tables, mind map and associations of an environment. You can view a list of all the environments and navigate through the list using advance filtering mechanisms to find the required environment. You can also analyze technical details, miscellaneous details and extended properties of an environment.

To access Environments in grid view, follow these steps:

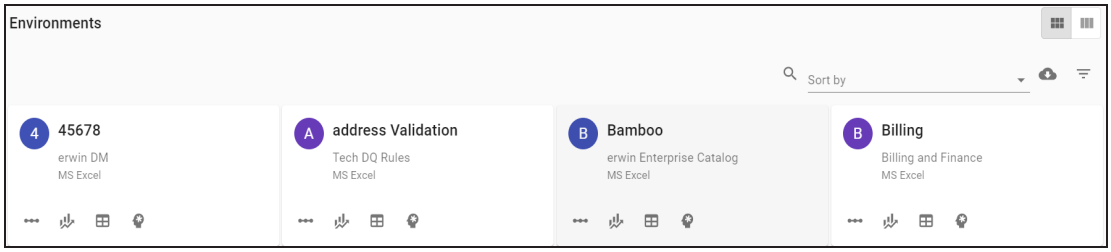
1. On the menu, expand the **Metadata** node.

   The Metadata node unfolds to display Systems, Environments, Tables, and Columns.



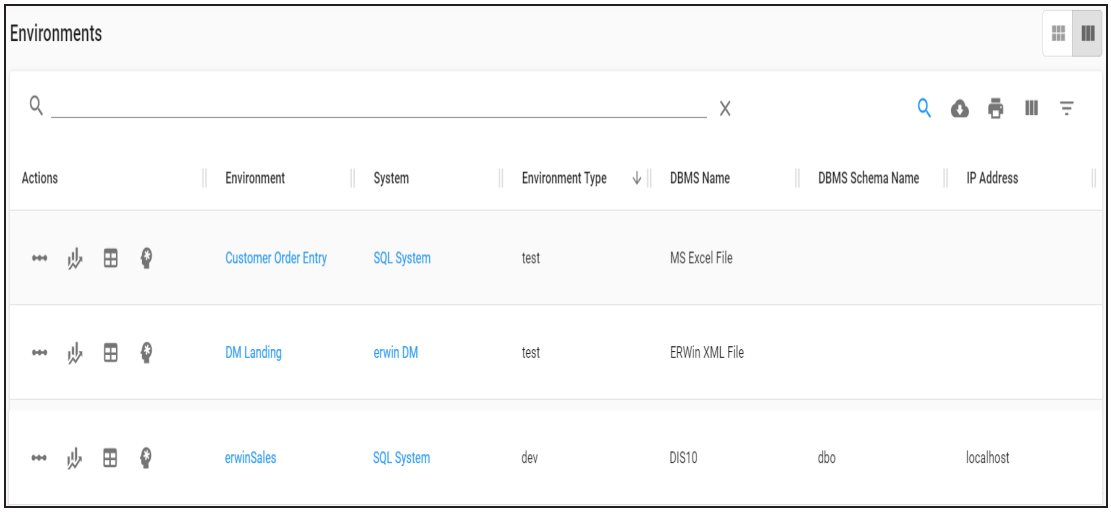
2. Click **Environments**.

   By default, the Environments card view appears.



3. Click .

   The Environments page appears. It displays a list of systems. You can click <Environment_Name> and <System_Name> to view their details.



You can use the filter and export options to work on the list. For more information on the filters and export options, refer to the Metadata topic.

You can further drill down to view an environment's:

- Lineage
- Impact Analysis
- Tables
- Mind map

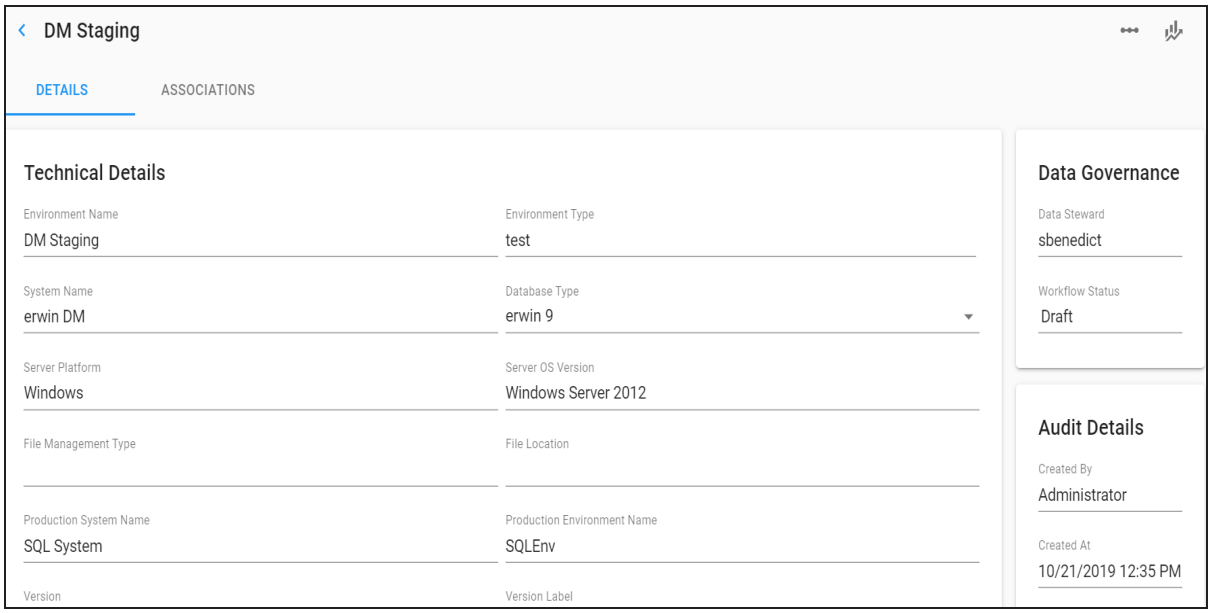
Environment Details

The environment details include environment type, database type, server platform, server OS version, and so on.

To view environment details, in the **Environments** grid, click <Environment_Name>.

The <Environment_Name> page appears.

The Details tab displays the Technical Details, Data Governance, and Audit Details sections. You can scroll down the page to view Miscellaneous Details and Extended Properties sections.

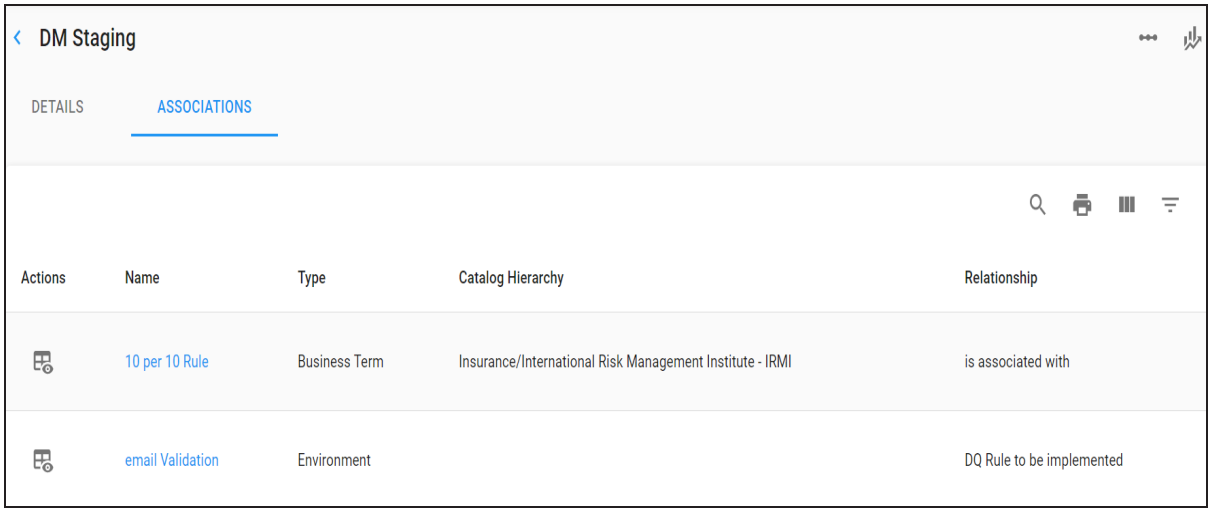


Associations

An environment 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 environments, on the <Environment_Name> page, click **Associations**.

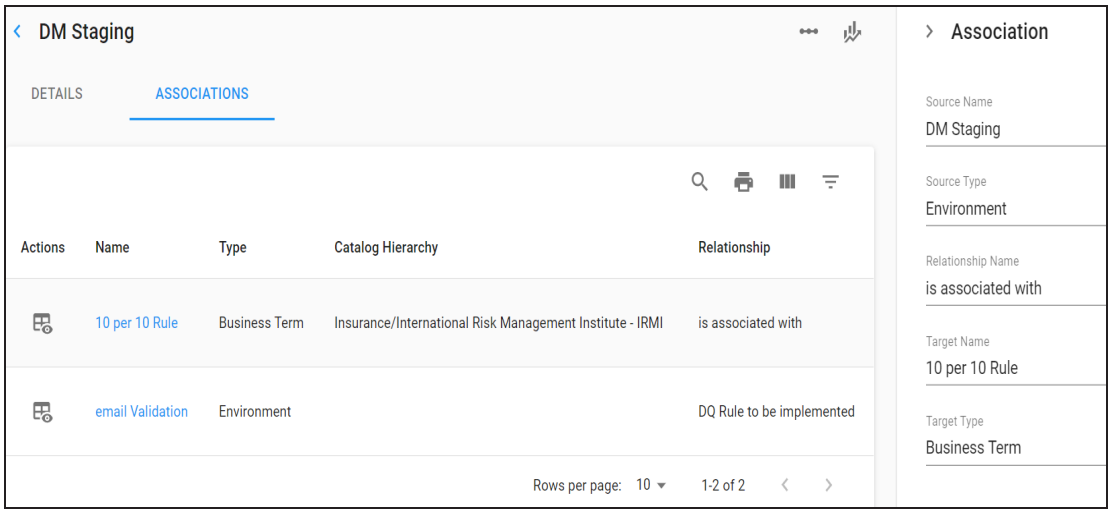
The list of associated assets appears. You can click the <Asset_Name> appearing as hyper-link to view its details.



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 Metadata topic.

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

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

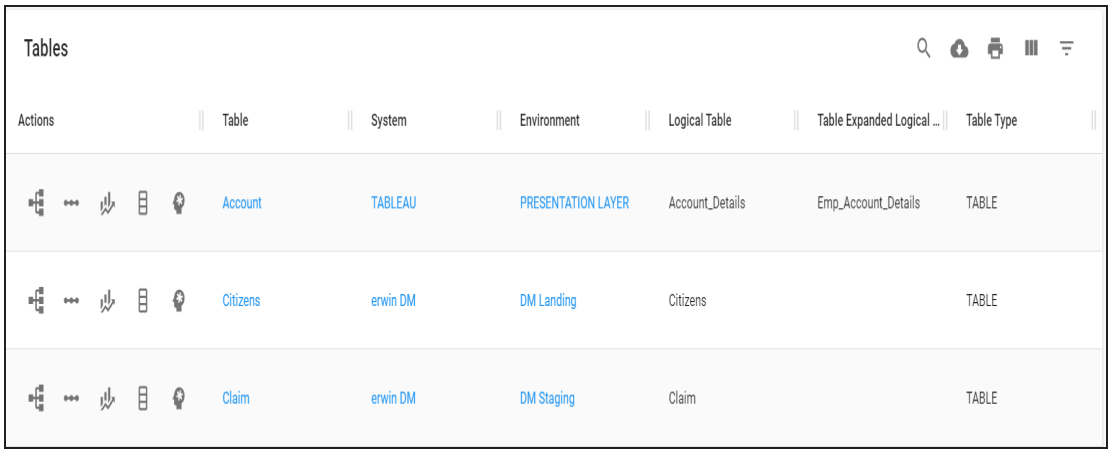


Tables

You can view list of tables in an environment. It displays information that includes logical name, expanded logical name, table type, and workflow status. You can drill down further to view mappings, lineage, impact analysis, columns, and mind map of a table.

To view tables in environments, in the **Environments** grid, click for the required environment.

The Tables grid appears.



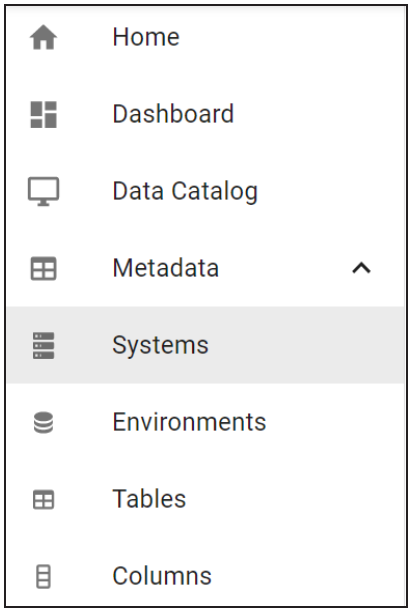
Tables

erwin DI Business User Portal (BUP) gives you access to view mappings, lineage, impact analysis, columns, mind map and associations of a table. You can view a list of all the tables and navigate through the list using advance filtering mechanisms to find the required table. You can also analyze technical, business and extended properties of a table.

To access the Tables list in grid view, follow these steps:

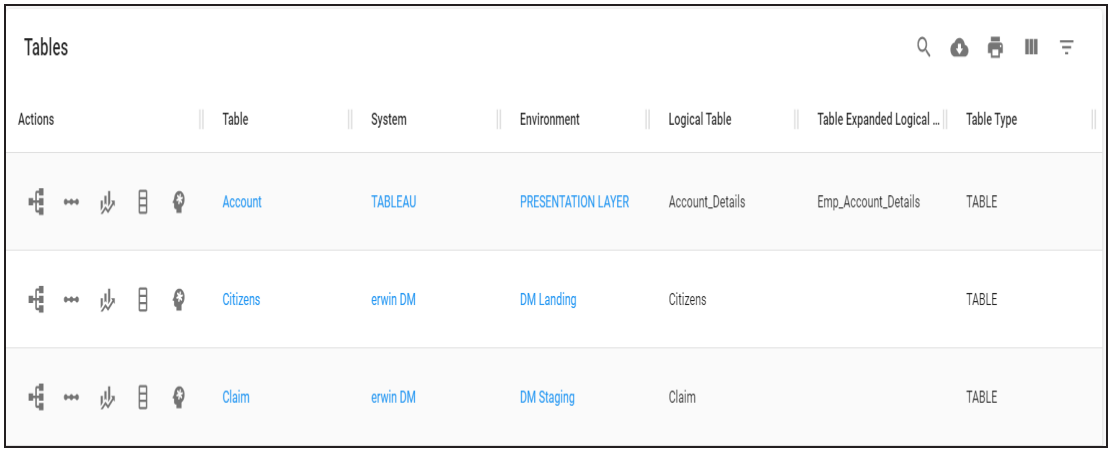
1. On the menu, expand the **Metadata** node.

   The Metadata node unfolds to display Systems, Environments, Tables, and Columns.



2. Click **Tables**.

   The Tables page appears. It displays a list of tables. You can click <Table_Name>, <System_Name>, and <Environment_Name> to view their details.



You can use the filter and export options to work on the list. For more information on the filters and export options, refer to the Metadata topic.

You can further drill down to view a table's:

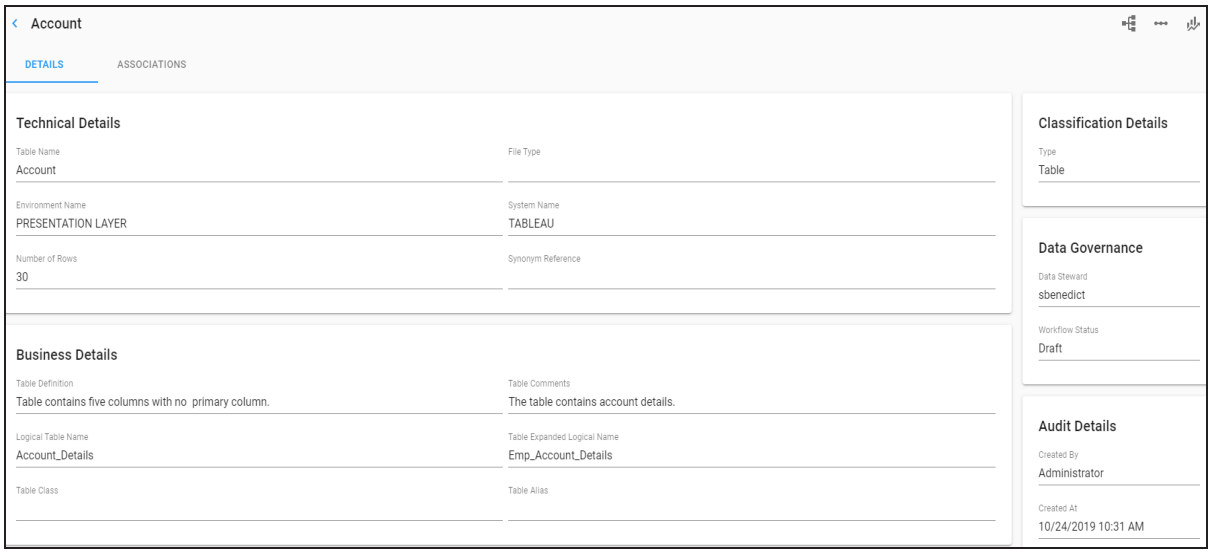
- Mappings
- Lineage
- Impact Analysis
- Columns
- Mind map

Table Details

Table details include environment name, system name, table definition, logical table name, expanded logical name, and so on.

To view table details, in the **Tables** grid, click <Table_Name>.

The <Table_Name> page appears. The Details tab displays the Technical Details, Business Details, User Defined Properties, and Extended Properties sections.

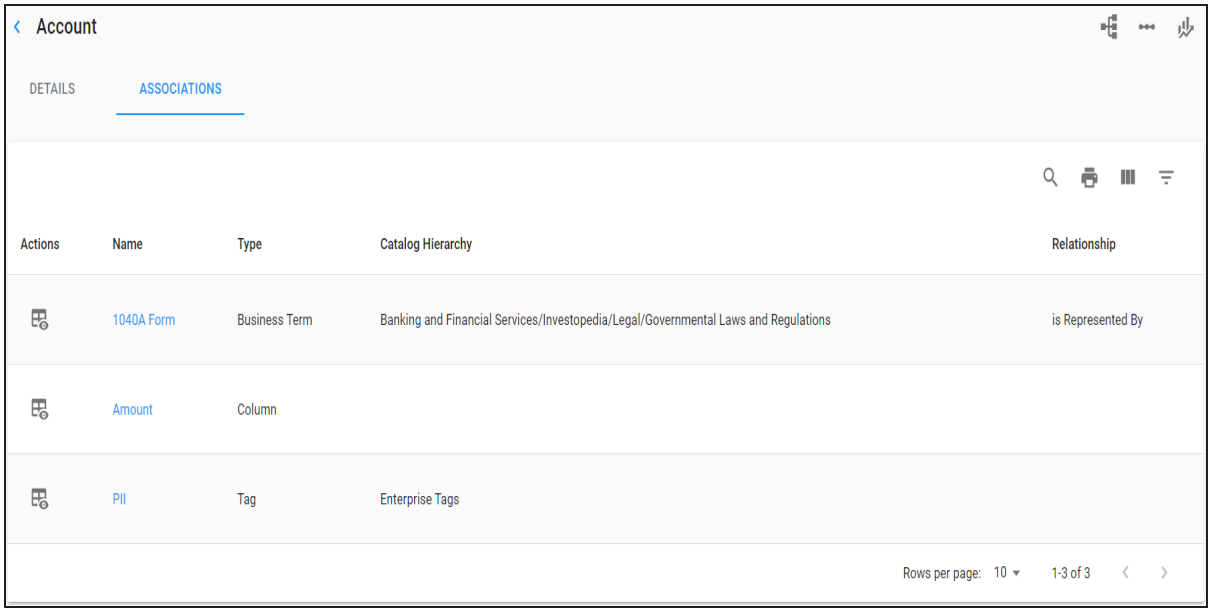


Associations

A table 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 tables, on the <Table_Name> page, click the **Associations** tab.

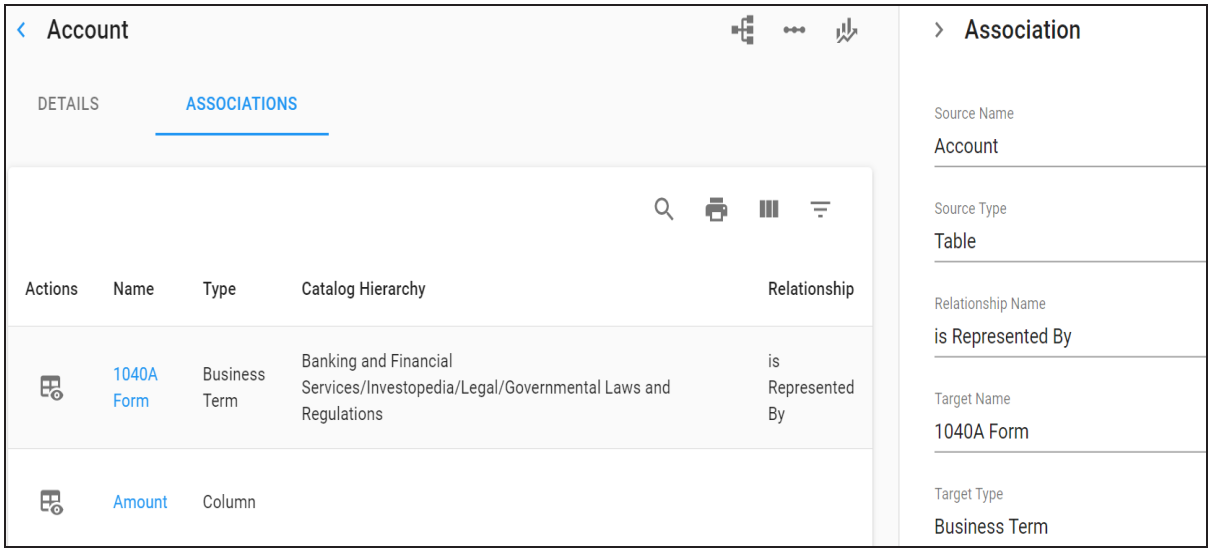
The list of associated assets appears. You can click the <Asset_Name> appearing as hyper-link to view its details.



You can use the filter and export options to work on the list. For more information on the filters and export options, refer to the Metadata topic.

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

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

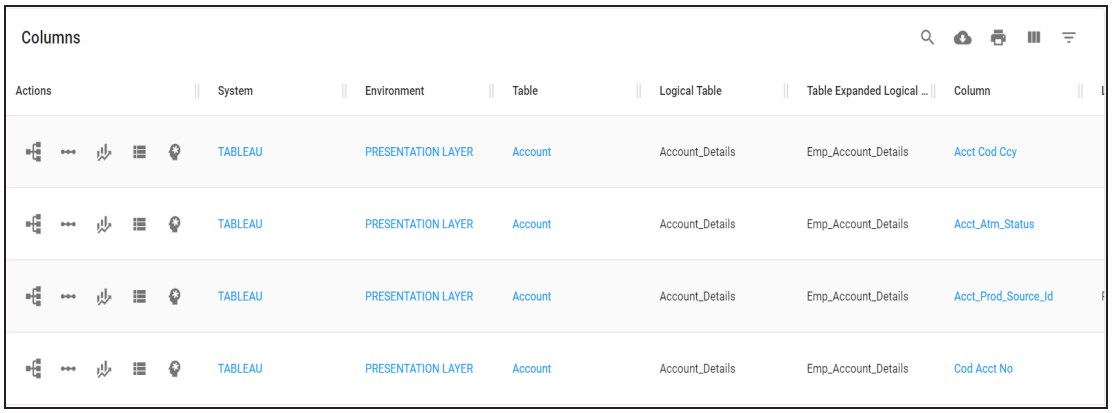


Columns

You can view list of columns in a table. It displays information that includes logical names, expanded logical names, and data type of columns. You can drill down further to view mappings, lineage, impact analysis, valid values, and mind map of a column.

To view columns in tables, in the **Tables** grid, click for the required table.

The Columns list appears.



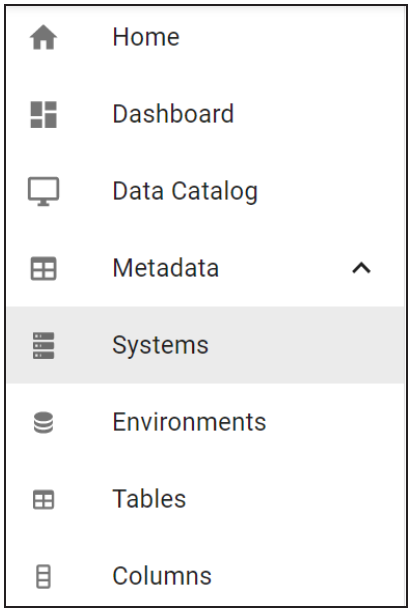
Columns

erwin DI Business User Portal (BUP) gives you access to view mappings, lineage, impact analysis, valid values, mind map, and associations of a column. The Columns grid displays all the columns and you can easily navigate through the grid using advance filtering mechanisms to find the required row. You can also analyze technical, business and extended properties of a column.

To access the Columns grid follow these steps:

1. In the menu, expand the **Metadata** node.

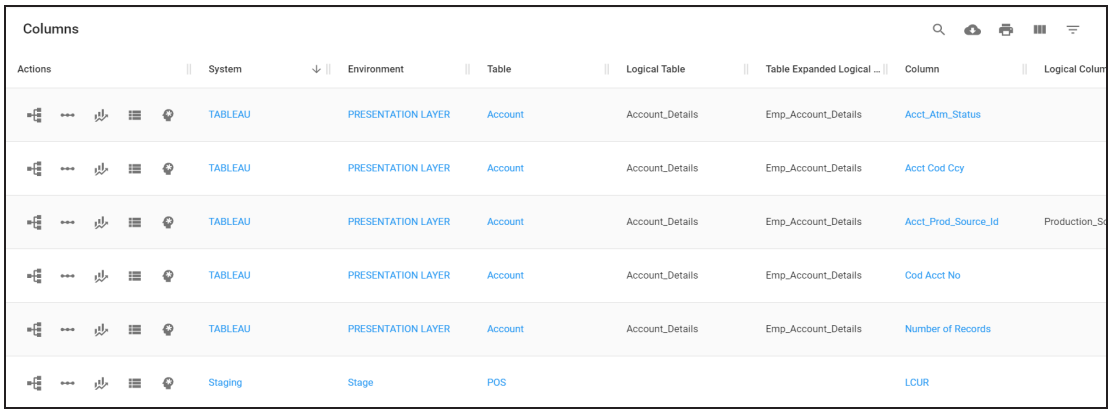
   The Metadata node unfolds to display Systems, Environments, Tables, and Columns.



2. Click **Columns**.

   The Columns grid appears. It displays a list of columns. You can click <System_Name>,

<Environment_Name>, <Table_Name>, and <Column_Name> to view their details.



You can use the filter and export options to work on the grid. For more information on the filters and export options, refer to the Metadata topic.

You can further drill down to view a column's:

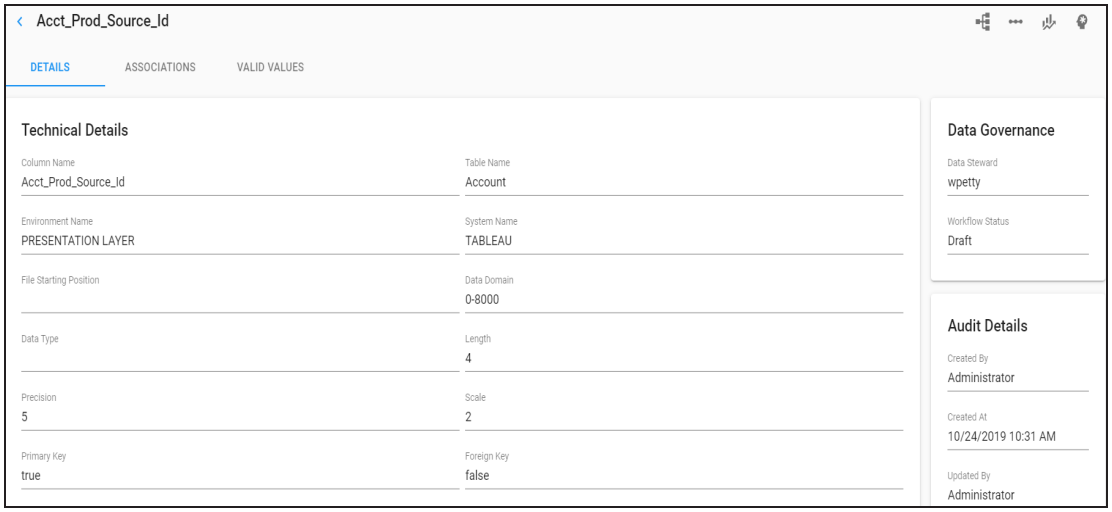
- Mappings
- Lineage
- Impact Analysis
- Valid Values
- Mind map

Column Details

Column details include environment name, system name, column definition, logical column name, column expanded logical name, and so on.

To view column details, in the **Columns** grid, click <Column_Name>.

The <Column_Name> page appears. The Details tab displays the Technical Details, Business Details, User Defined Properties, and Extended Properties section.

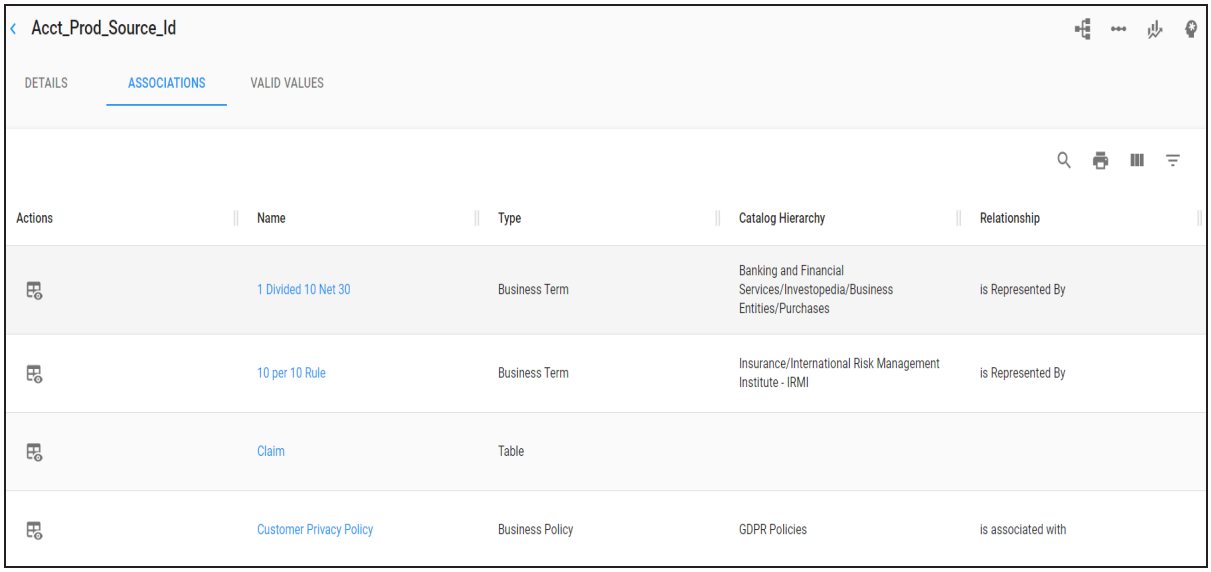


Associations

A column 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 columns, on the <Column_Name> page, click the **Associations** tab.

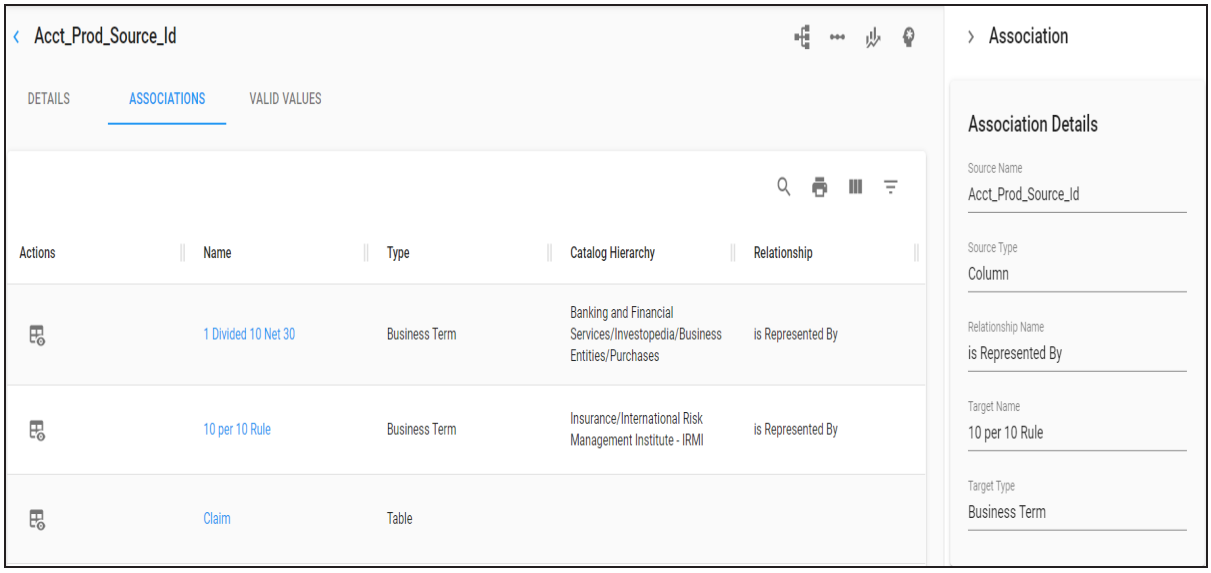
The list of associated assets appears. You can click the <Asset_Name> appearing as hyper-link to view its details.



You can use the filter and export options to work on the grid. For more information on the filters and export options, refer to the Metadata topic.

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

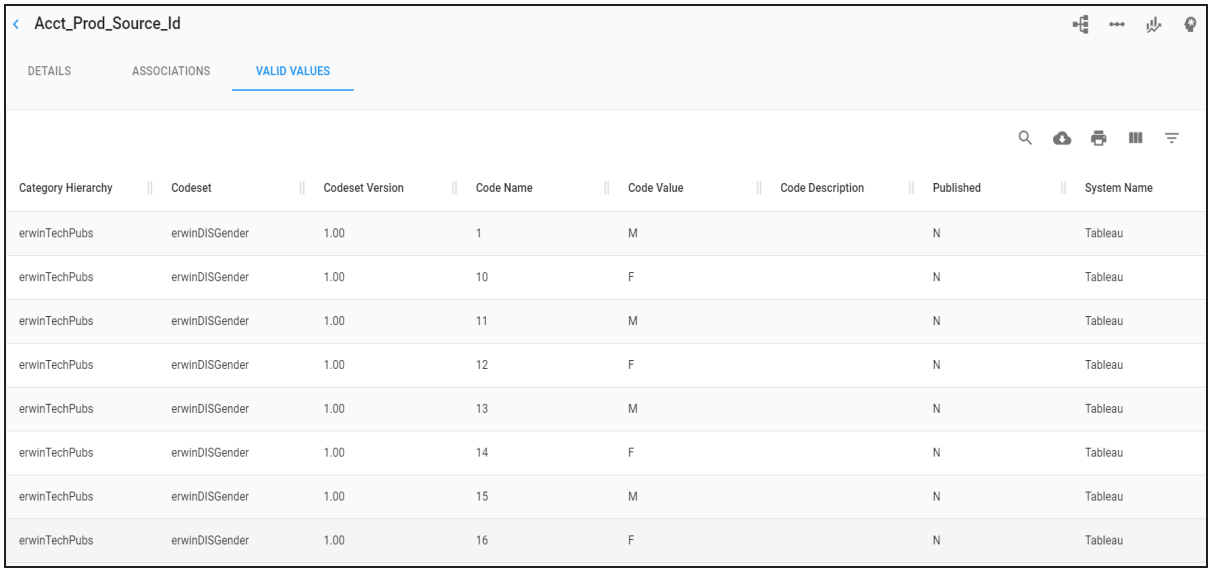
The association details of the column with the asset appears.



Valid Values

You can view the assigned codesets to the column as valid values.

To view the valid values of columns, on the <Column_Name> page, click the **Valid Values** tab.

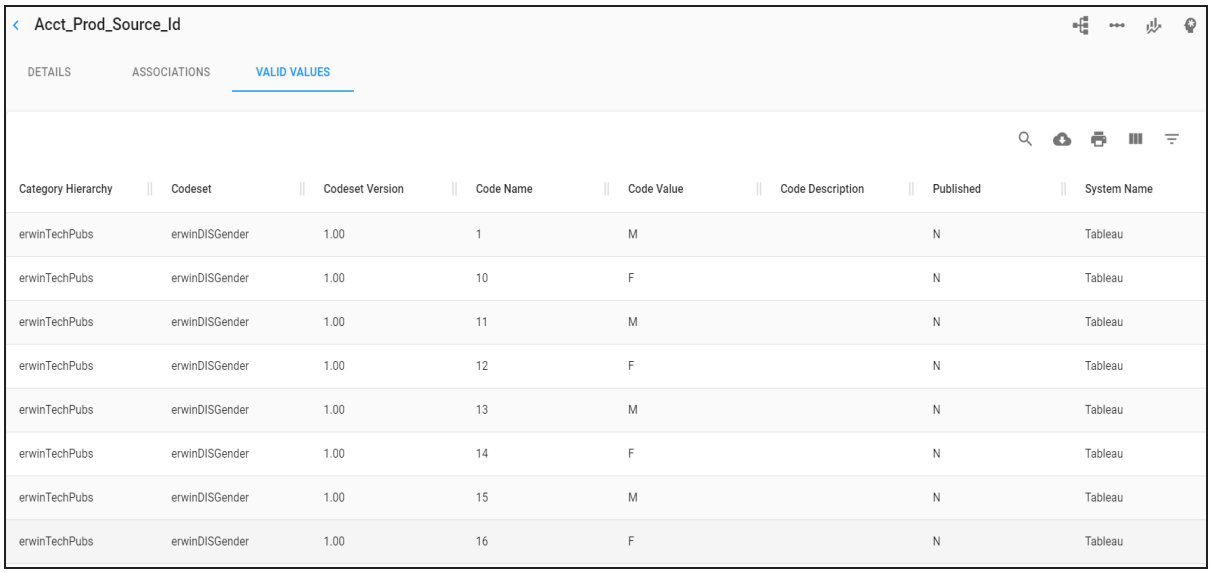


You can also view valid values of a column in the Columns grid. For more information on viewing valid values in the Columns grid, refer to the Valid Values topic.

Valid Values

You can view the assigned codesets to the column as valid values.

To view the valid values of columns, in the **Columns** grid click .

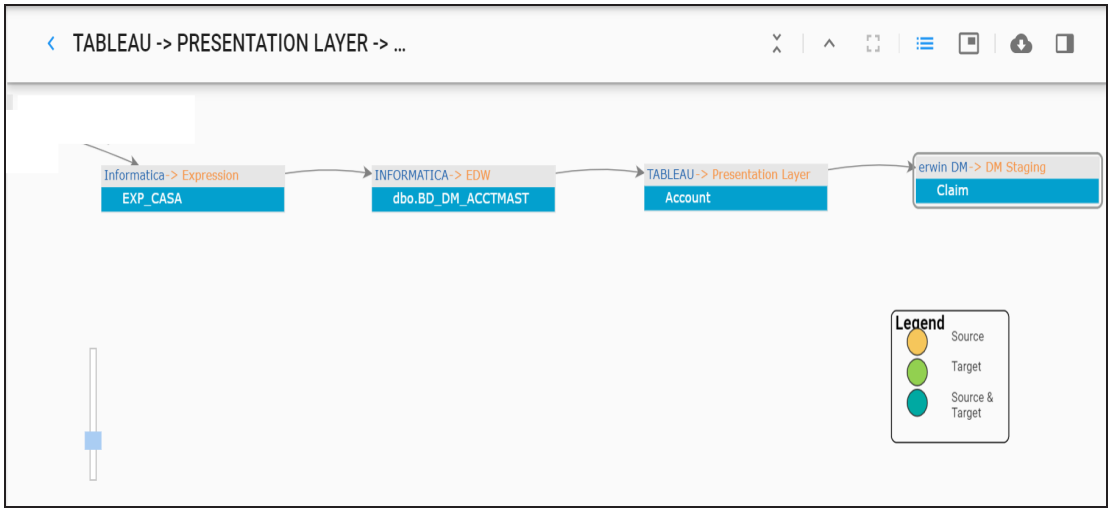


Lineage

You can view lineage of a technical asset and trace data's origin, its transformations, and its destination after source to target mappings.

To view lineage, in the <Technical_Asset> grid, click for the required technical asset.

The lineage of the technical asset appears.



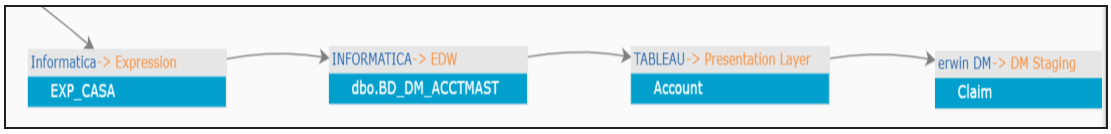
Use the following options to work on the lineage:

Overview Lineage( )

Use this to switch between detailed lineage view and overview lineage view. By default, detailed lineage view appears.

Detailed lineage view: This view is helpful to technical users like ETL developers. When you reverse engineer ETL jobs or SQL scripts, the lineage might contain temporary tables, ETL components (filters, joiners, routers etc.). This view includes technical assets that do not exist in the Metadata Manager.

For example, the following lineage displays the EXP_CASA and dbo.BD_DM_ACCTMAST tables. These do not exist in the Metadata Manager.



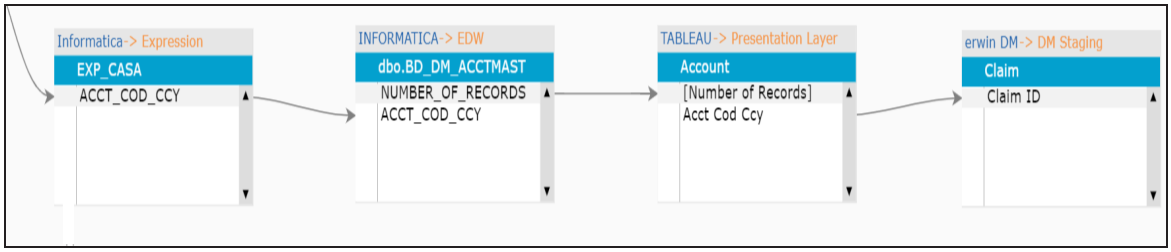
Overview lineage view: This view is helpful to business users. It excludes technical assets that do not exist in the Metadata Manager.

For example, the following lineage does not display the EXP_CASA and dbo.BD_DM_ACCTMAST tables.

Expand ( )

By default, lineage appears in the collapsed view. Use this option to switch between the collapsed and expanded view. The expanded view includes technical assets lower in hierarchy.

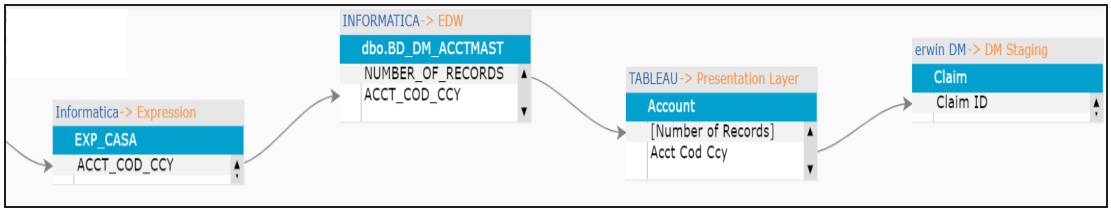
For example, the following lineage displays the expanded view that includes columns.



Autofit ( )

This switch is enabled when you are in the expanded view ( ). Use it to switch between Auto Expand View and Autofit view. The Auto Expand view shrinks the space for the technical assets lower in hierarchy and the Autofit view expands the space to fit the list of technical assets lower in hierarchy.

For example, the following lineage appears in the Auto Expand view that shrinks the space for columns.

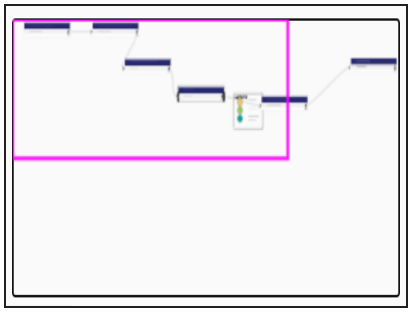


Legend ( )

By default, legend appears in the lineage. Use this switch to make legend appear or disappear.

Overview ( )

By default, the overview does not appear. Use this switch to make the overview appear or disappear. You can move the purple box in the overview to navigate across the lineage.



Export ( )

Use this option to download the lineage in the PDF, XLSX, or, JPG format.

Properties ( )

Click a technical asset to view its properties under this pane. It has different sections for different lineage types.

System's Lineage:

- Summary: This section gives information about the number of environments acting as source, target, or both in the lineage.
- System Details: This section gives information about the selected system in the lineage.
- Environment Details: This section displays a list of environments under the selected system. The list does not include environments that are not part of lineage. You can click <Environment_Name> to view the environment's lineage.
- Extended Properties: This section displays the extended properties configured for the selected system.

Environment's Lineage

- Summary: This section gives information about the number of tables acting as source, target, or both in the lineage.
- Environment Details: This section gives information about the selected environment in the lineage.
- Table Details: This section displays a list of tables under the selected environment. The list does not include tables that are not part of lineage. You can click <Table_Name> to view the table's lineage.
- Extended Properties: This section displays the extended properties configured for the selected environment.

Table's Lineage

- Summary: This section gives information about the number of columns acting as source, target, or both in the lineage.
- Table Details: This section gives information about the selected table in the lineage.
- Column Details: This section displays a list of columns under the selected table. The list does not include columns that are not part of lineage. You can click <Column_Name> to view the column's lineage.
- Technical: This section displays the technical properties of the selected table.
- Business: This section displays the business properties of the selected table.
- Extended Properties: This section displays the extended properties configured for the table.

Column's Lineage

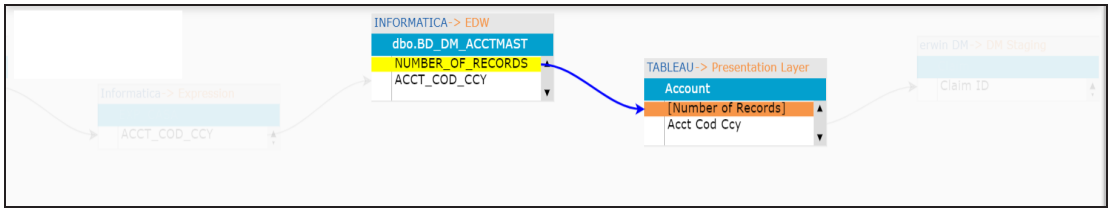
- Summary: This section gives information about the number of columns acting as source, target, or both in the lineage.
- Technical: This section displays the technical properties of the selected column.
- Business: This section displays the business properties of the selected column.

- Transformation: This section displays the transformation details of the selected column.
- Valid Values: This section displays the codesets assigned to the selected column.
- Extended Properties: This section displays the extended properties configured for the selected column.

Highlighting lineage path

To highlight a lineage path with respect to a technical asset, click the technical asset in the lineage. The technical asset is highlighted in orange color, its forward lineage path appears in red, and its reverse lineage path appears in blue. The technical assets that are not part of the lineage path disappear.

For example, in the following lineage the EXP_CASA and Claim table disappear.



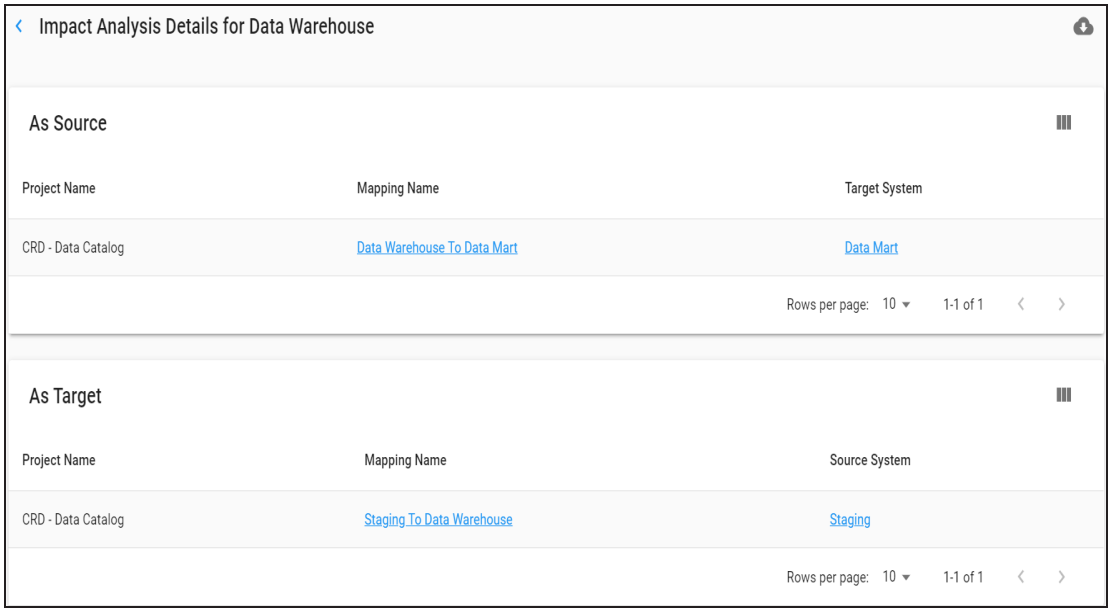
Impact Analysis

A technical asset may act as a source, target, or both in mapping projects. Impact analysis details of a technical asset displays the impact of the technical asset as source and target. In addition to this the impact analysis of tables and columns display:

- Indirect (upstream and downstream) impact
- Other impacts (business rules, source extract SQL, and lookups)

Systems

To view impact analysis details of systems, in the **Systems** grid, click for the required system.



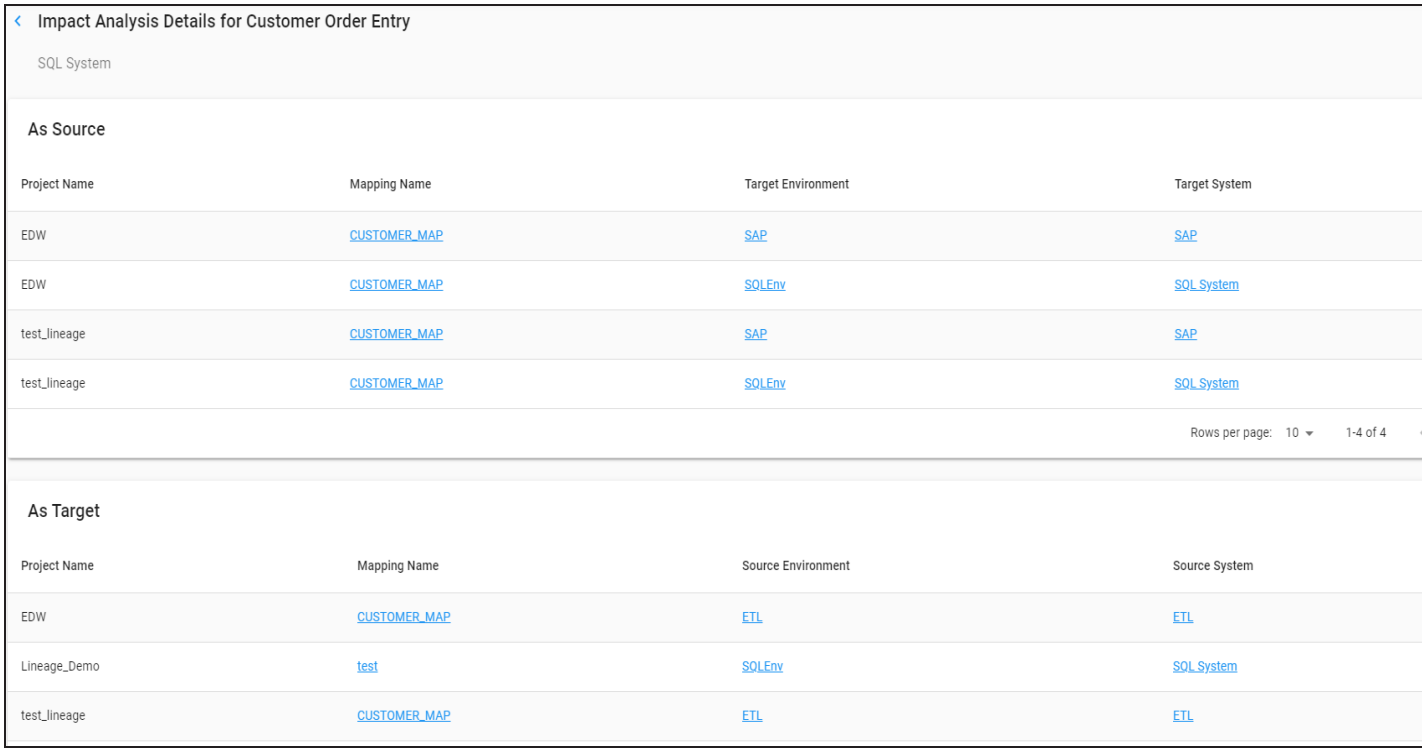
Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the checkboxes for the columns that are not required in the grid.

You can click the required <Mapping_Name> to view the mapping details.

To download the impact analysis in the XLSX format, click .

Environments

To view impact analysis details of environments, in the **Environments** grid, click for the required environment.



Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the checkboxes for the columns that are not required in the grid.

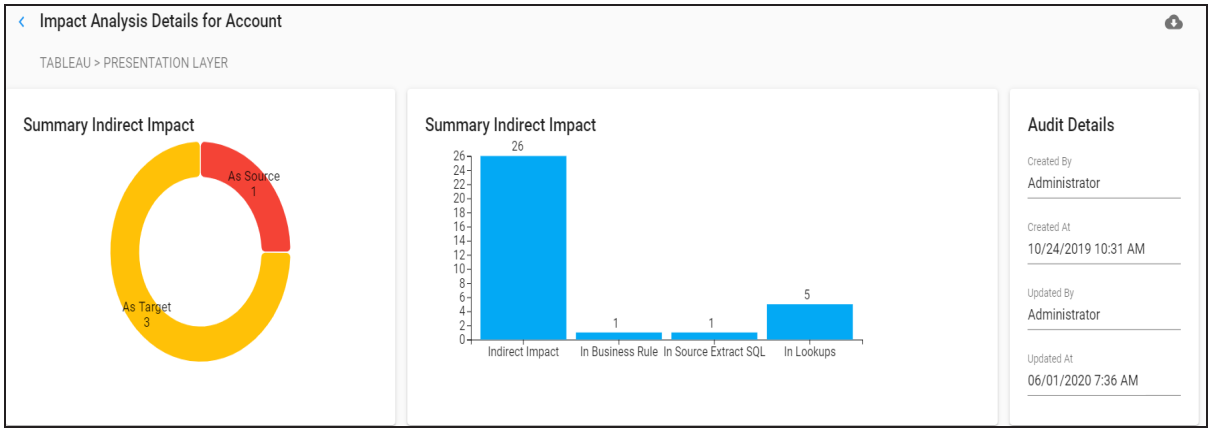
You can click the required <Mapping_Name>, <Environment_Name>, or <System_Name> to view its details.

To download the impact analysis in the XLSX format, click .

Tables

A table may act as a source, target, or both in mapping projects. It may also act as a business rule, source extract SQL, or lookup condition.

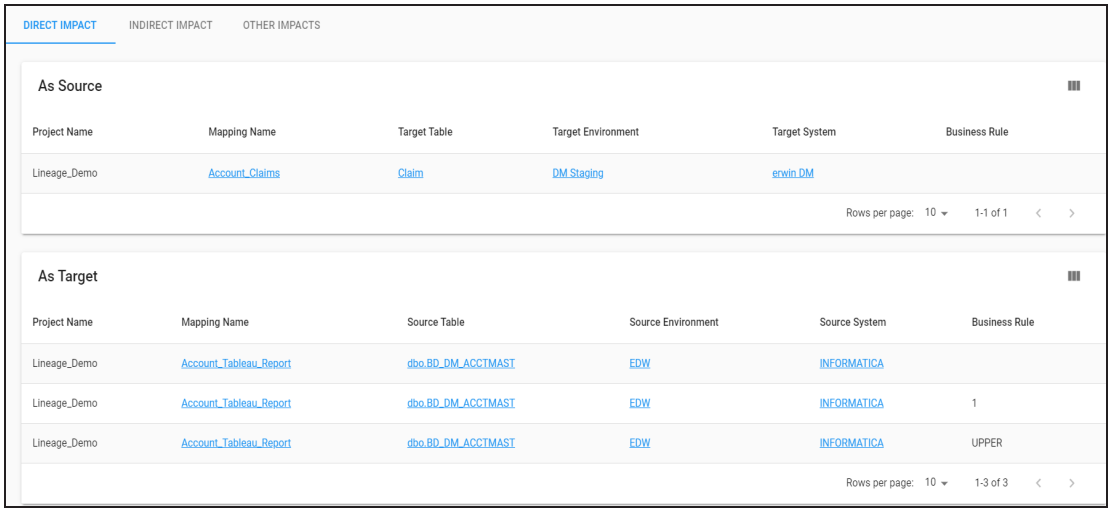
To view impact analysis details of tables, in the **Tables** grid, click for the required table.



You can view the summary of indirect impact of the table in pie chart and bar graph. Use to download the complete impact analysis in the XLSX format.

Direct Impact

You can scroll down the page to view direct impact of the table under the Direct Impact tab.



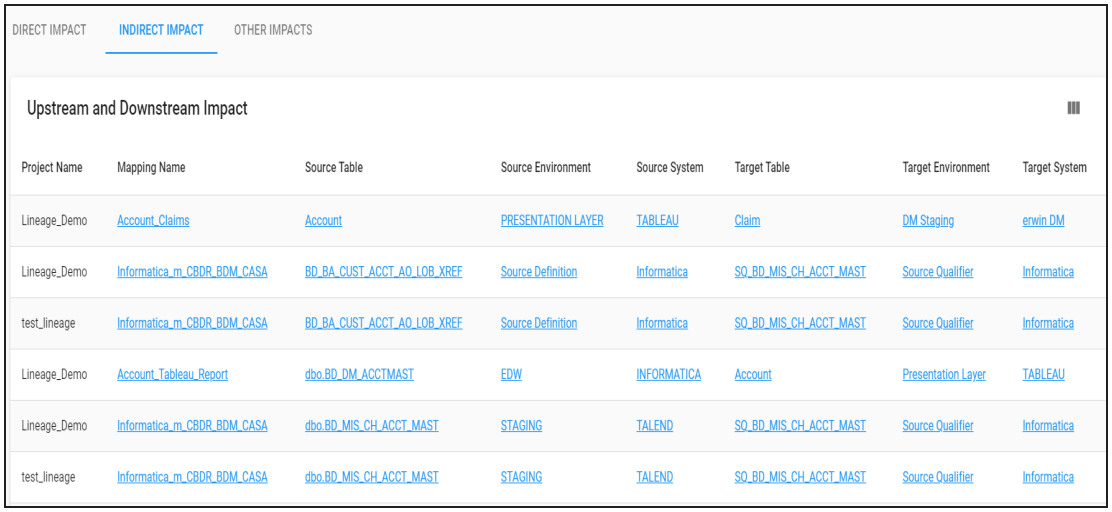
On the Direct Impact tab, you can click <Mapping_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Indirect Impact

Indirect impact analysis displays upstream and downstream impact of tables.

To view indirect impact, click the **Indirect Impact** tab.



Project Name	Mapping Name	Source Table	Source Environment	Source System	Target Table	Target Environment	Target System
Lineage_Demo	Account_Claims	Account	PRESENTATION LAYER	TABLEAU	Claim	DM Staging	erwin DM
Lineage_Demo	Informatica_m_CBDR_BDM_CASA	BD_BA_CUST_ACCT_AO_LOB_XREF	Source Definition	Informatica	SQ_BD_MIS_CH_ACCT_MAST	Source Qualifier	Informatica
test_lineage	Informatica_m_CBDR_BDM_CASA	BD_BA_CUST_ACCT_AO_LOB_XREF	Source Definition	Informatica	SQ_BD_MIS_CH_ACCT_MAST	Source Qualifier	Informatica
Lineage_Demo	Account_Tableau_Report	dbo.BD_DM_ACCTMAST	EDW	INFORMATICA	Account	Presentation Layer	TABLEAU
Lineage_Demo	Informatica_m_CBDR_BDM_CASA	dbo.BD_MIS_CH_ACCT_MAST	STAGING	TALEND	SQ_BD_MIS_CH_ACCT_MAST	Source Qualifier	Informatica
test_lineage	Informatica_m_CBDR_BDM_CASA	dbo.BD_MIS_CH_ACCT_MAST	STAGING	TALEND	SQ_BD_MIS_CH_ACCT_MAST	Source Qualifier	Informatica

On the Indirect tab, click <Mapping_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

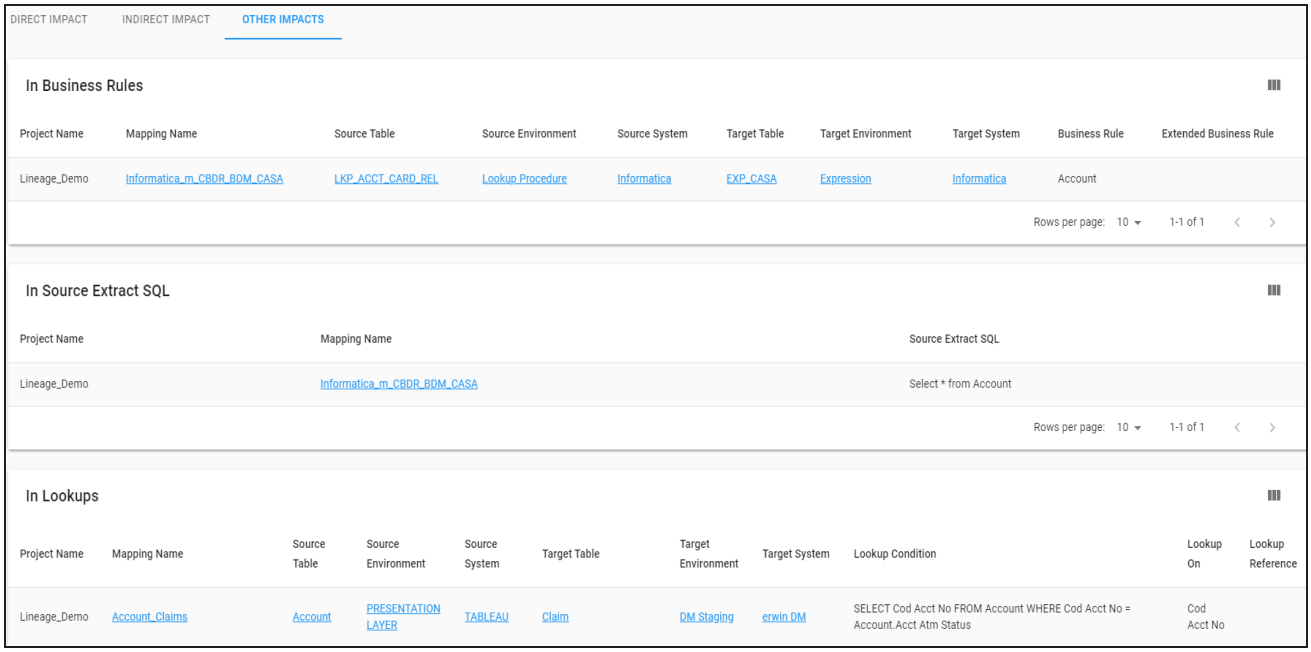
Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Other Impacts

Other impacts refer to impact of a table in:

- Business rules
- Source extract SQL
- Lookups

To view other impacts, click the **Other Impact** tab.



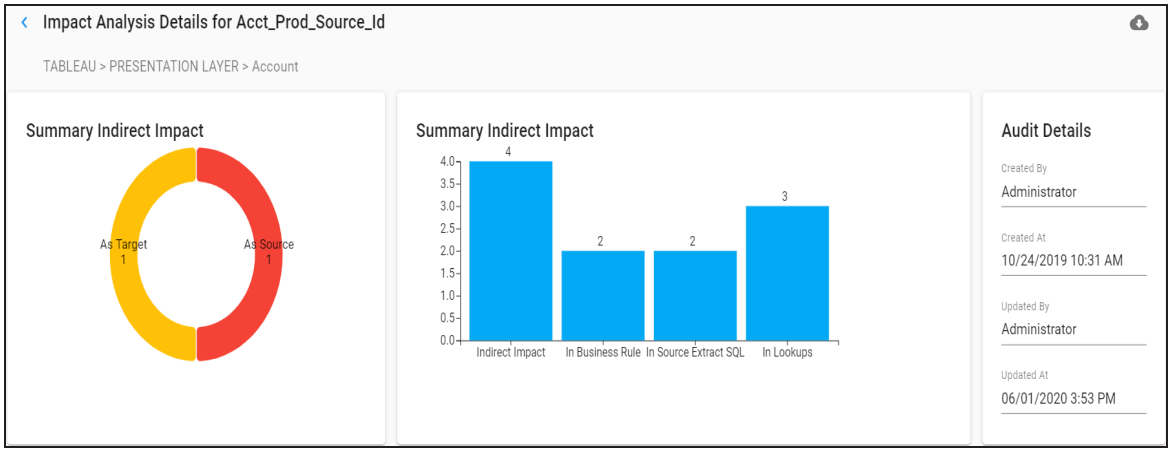
On the Other Impact tab, click <Mapping_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Columns

A column may act as a source, target, or both in mapping projects. It may also act as a business rule, source extract SQL, or lookup condition.

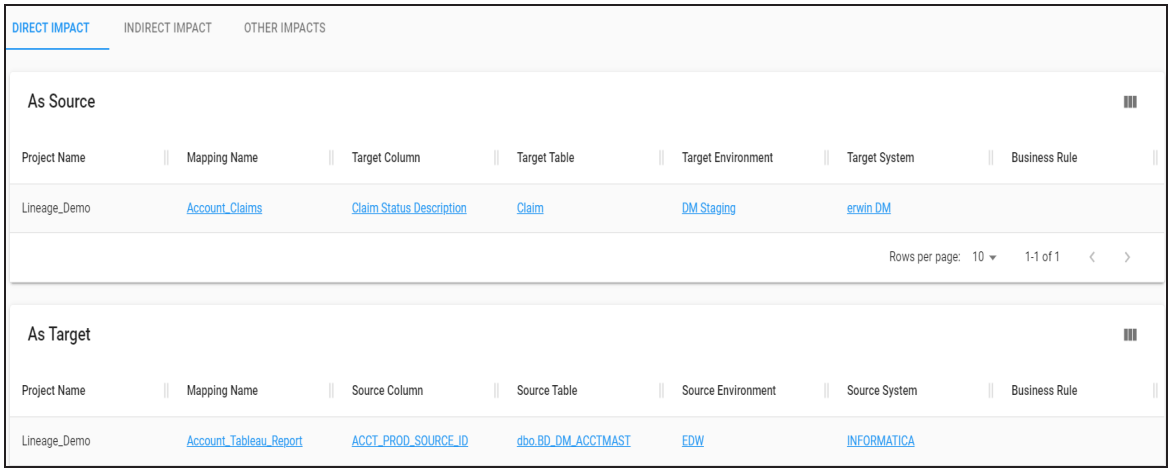
To view impact analysis details of columns, in the **Columns** grid, click for the required column.



You can view the summary of indirect impact of the column in pie chart and bar graph. Use to download the complete impact analysis in the XLSX format.

Direct Impact

You can scroll down the page to view direct impact of the column under the Direct Impact tab.



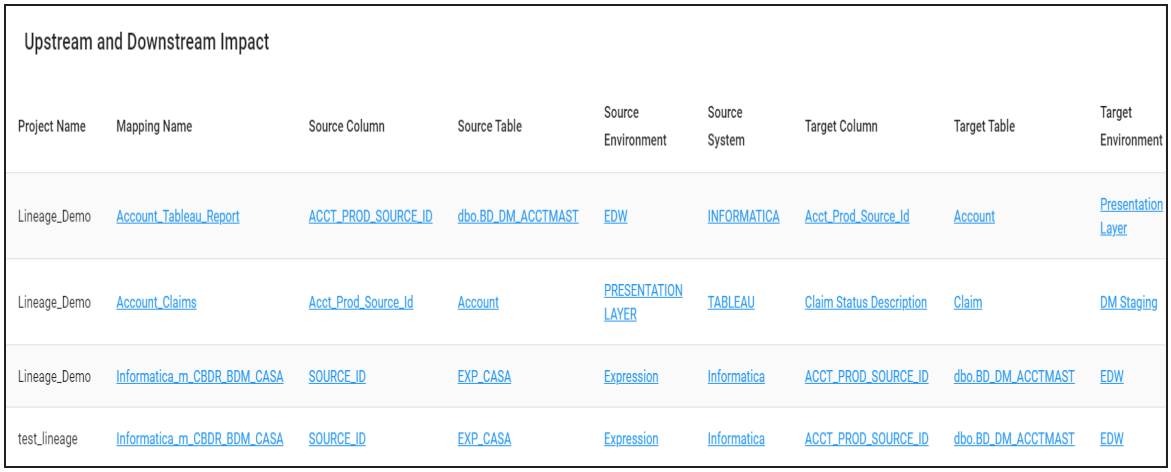
On the Direct Impact tab, you can click <Mapping_Name>, <Column_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

Use to select columns that you want to show in the Direct Impact grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Indirect Impact

Indirect impact analysis displays upstream and downstream impact of columns.

To view indirect impact, click the **Indirect Impact** tab.



Upstream and Downstream Impact

Project Name	Mapping Name	Source Column	Source Table	Source Environment	Source System	Target Column	Target Table	Target Environment
Lineage_Demo	Account_Tableau_Report	ACCT_PROD_SOURCE_ID	dbo.BD_DM_ACCTMAST	EDW	INFORMATICA	Acct_Prod_Source_Id	Account	Presentation Layer
Lineage_Demo	Account_Claims	Acct_Prod_Source_Id	Account	PRESENTATION LAYER	TABLEAU	Claim Status Description	Claim	DM Staging
Lineage_Demo	Informatica_m_CBDR_BDM_CASA	SOURCE_ID	EXP_CASA	Expression	Informatica	ACCT_PROD_SOURCE_ID	dbo.BD_DM_ACCTMAST	EDW
test_lineage	Informatica_m_CBDR_BDM_CASA	SOURCE_ID	EXP_CASA	Expression	Informatica	ACCT_PROD_SOURCE_ID	dbo.BD_DM_ACCTMAST	EDW

On the Indirect tab, you can click <Mapping_Name>, <Column_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

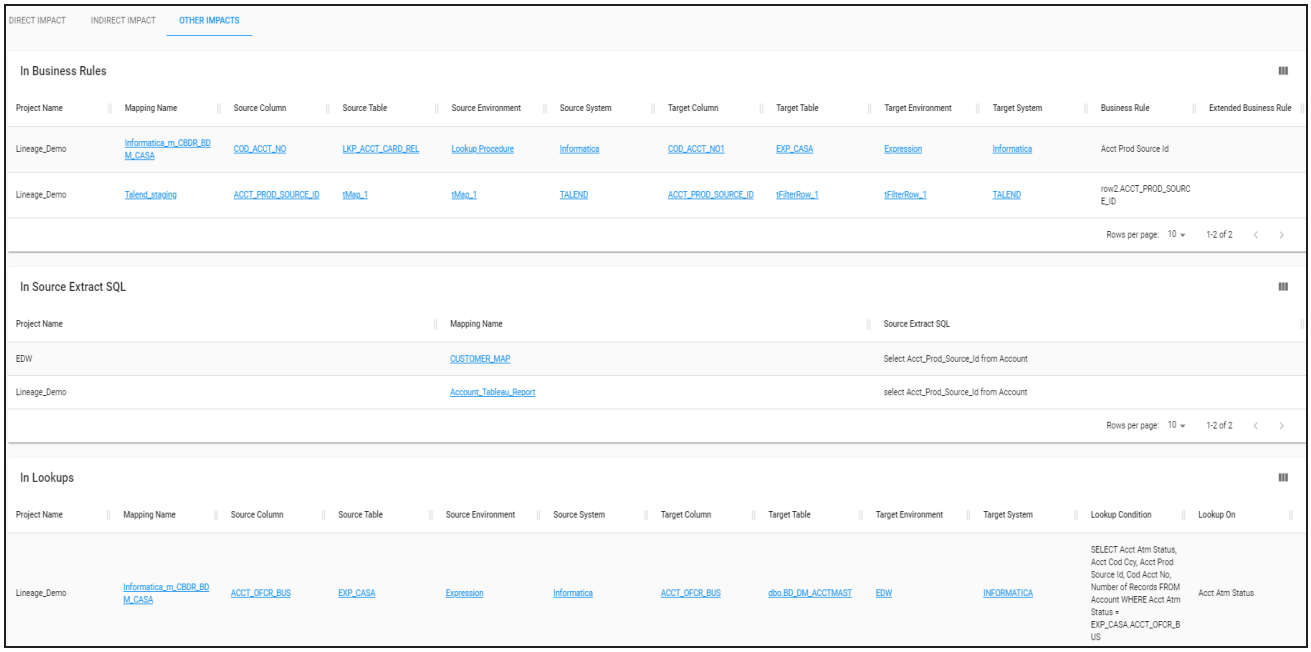
Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Other Impacts

Other impacts refer to impact of a column in:

- Business rules
- Source extract SQL
- Lookups

To view other impacts, click the **Other Impact** tab.



On the Other Impact tab, click <Mapping_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

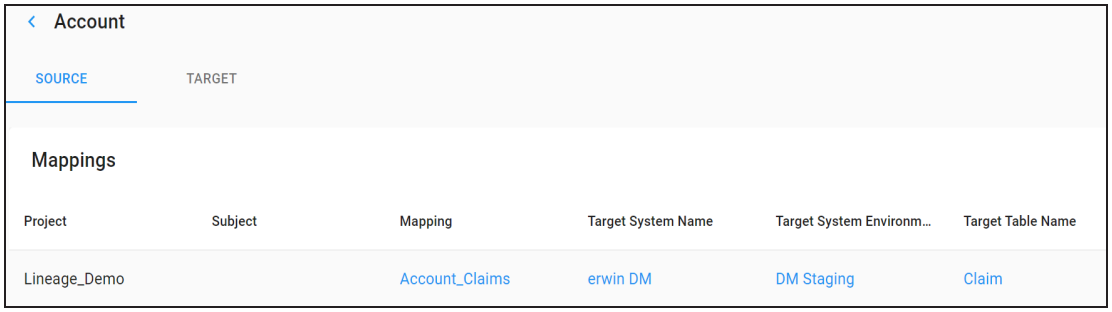
Mappings

You can view mappings of technical assets (tables and columns) where they act as source or target.

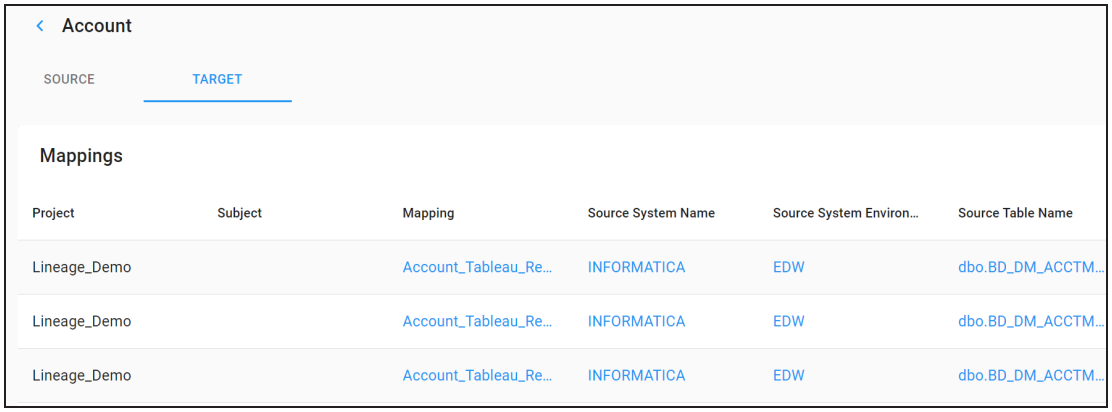
To view mappings, in the <Technical_Asset> grid, click .

The Mappings page appears. By default, the Source tab opens.

For example, the following image displays mappings of the Account table where it acts as source.



To view a list of mappings where the technical asset (table or column) is a target, click the **Target** tab.

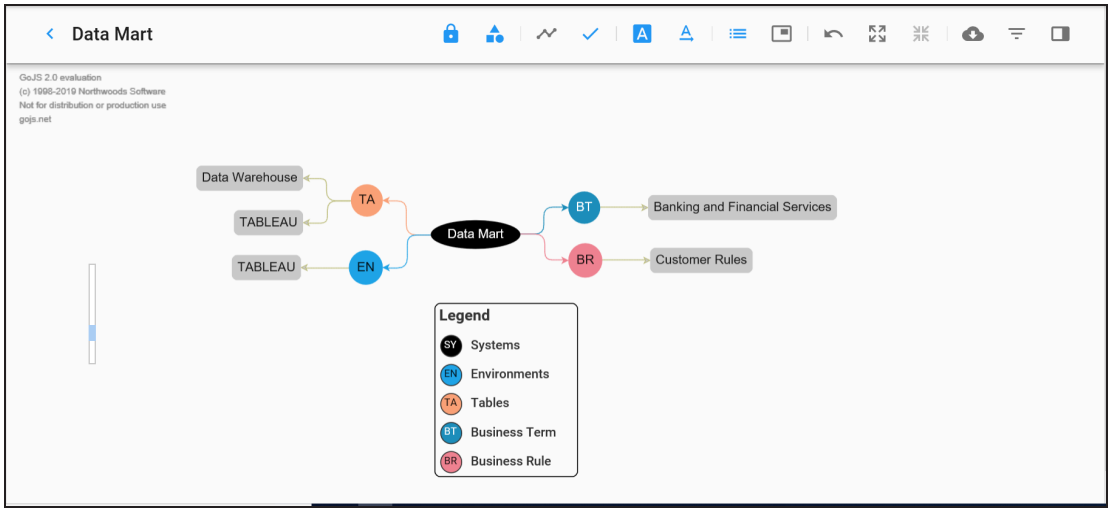


You can click <Mapping_Name>, <Source_System_Name>, <Source_System_Environment>, or <Source_Table_Name> to view their details.

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 technical assets, in the <Technical_Asset> grid, click .



Use the following options to work on the mind map

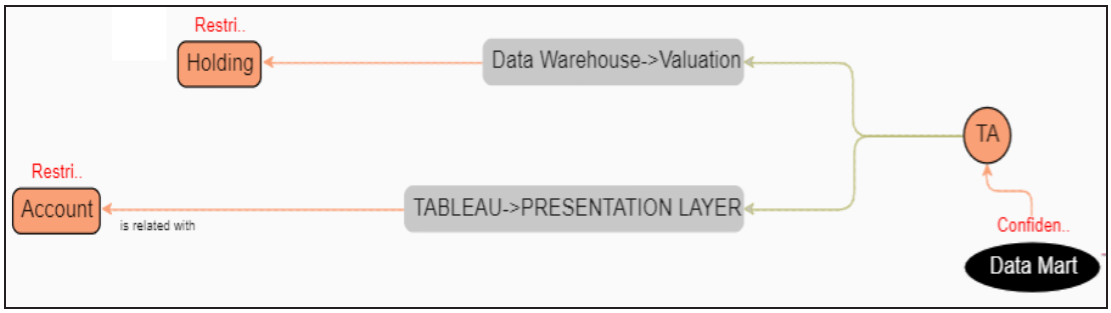
View Sensitive Data Indicator ( )

Use this switch to view sensitive data indicator of assets on the mind map.

View Sensitivity Data Classification ( )

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

For example, the following mind map displays sensitive data classifications of assets as Restri (restricted) and Confiden (Confidential).

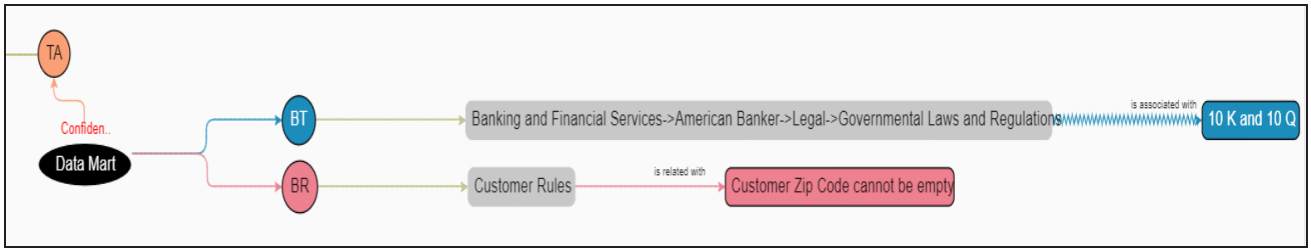


Switch to Enterprise Relationship Configuration ( )

Switch **Switch to Enterprise Relationship Configuration** to to view enterprise relationship configuration. The enterprise relationship configuration refers to the line

color and type as configured in the Business Glossary Manager.

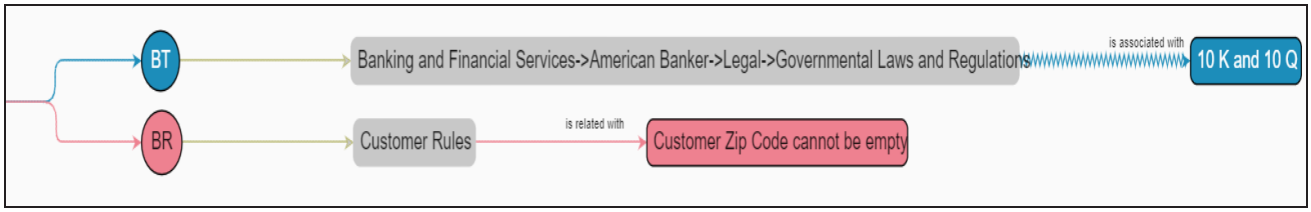
For example, the following mind map displays the relationship between business term and system in blue color and ZigZag type display.



Include Relationships ( )

Switch **Include Relationships** to to view relationships between assets on the mind map.

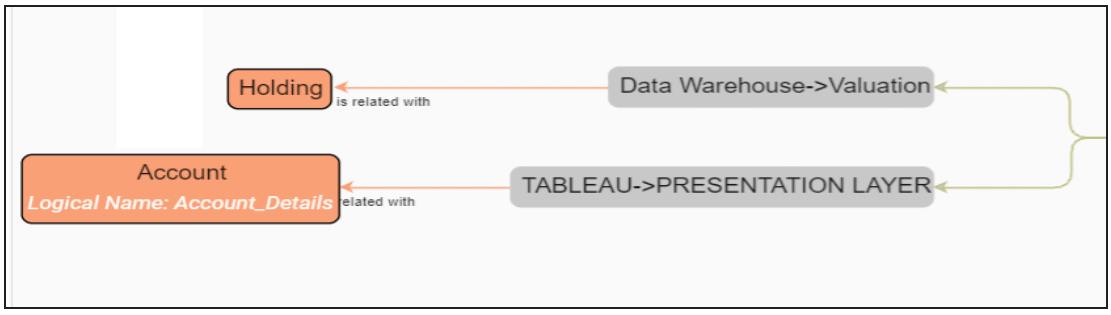
For example, the following mind map displays the relationships between assets.



Logical Names ( )

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

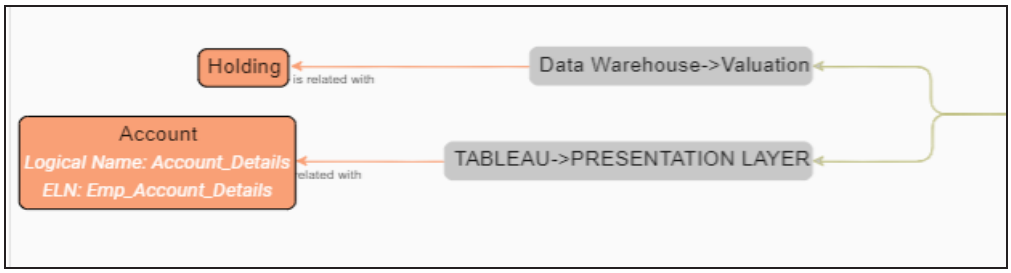
For example, the following mind map displays a logical name of a table.



Expanded Object Logical Names ( )

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

For example, the following mind map displays expanded logical name of a table.

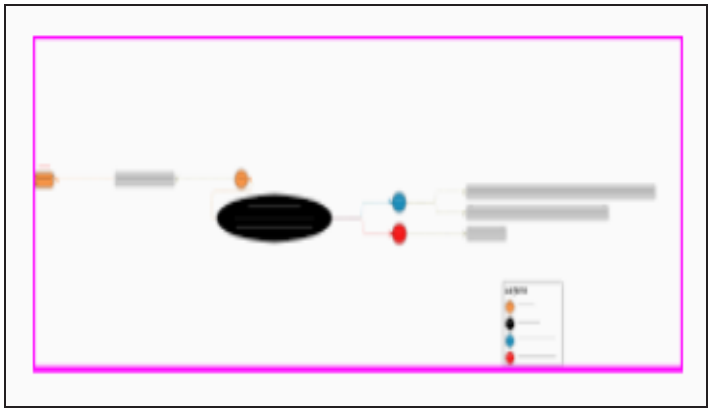


Legend ( )

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 switch to expand the nodes of the assets on the mind map.

Collapse All ( )

Use this switch 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 the 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.