erwin DI Business User Portal

User Guide

Release v10.1

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Contact erwin

Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

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:

- 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
- Other helpful resources appropriate for your product

For information about other erwin products, visit http://erwin.com/.

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erwin Data Modeler News and Events

Visit www.erwin.com to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

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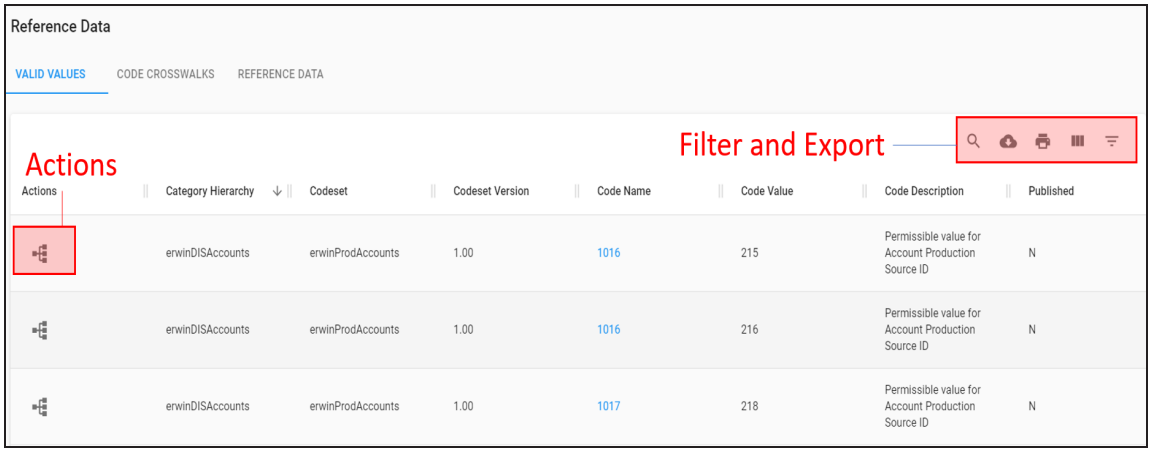
Reference Data

Reference data sets the permissible values for other data fields. You can view all your code-sets (valid values), code crosswalks, and reference data in a tabular grid format in erwin DI Business User Portal (BUP).

To access your reference data, on the menu, click **Reference Data**.

The Reference Data page appears. By default, the Valid Values tab opens.



To view code mappings, click . For more information on viewing code mappings, refer to the Code Mappings topic.

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

Options	Description
	Use this option to search the required <Reference_Data>.
	Use this option to download a list of <Reference_Data> in the XLSX format.
	Use this option to print a list of <Reference_Data>.
	Use this option to select columns that you want to show in a grid. By default, all the columns are selected.
	Use this option to filter <Reference_Data> based on the available options.

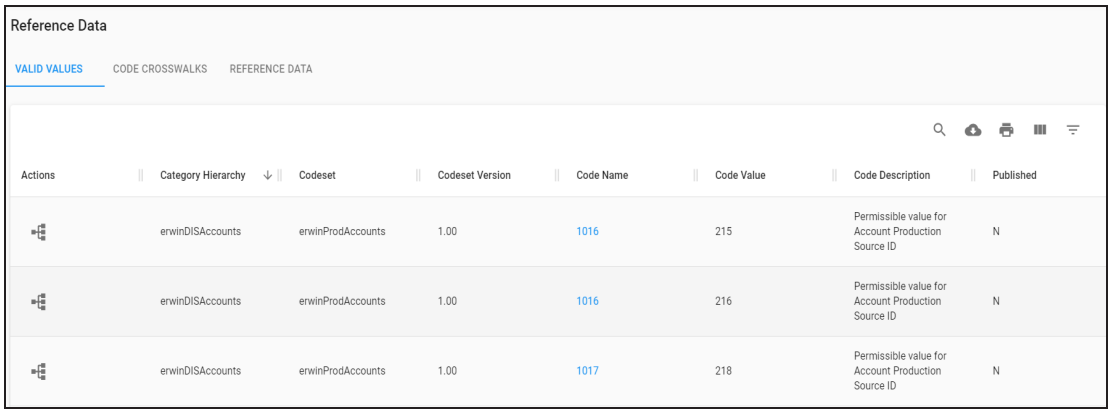
You can access your reference data under:

- Valid values
- Code Crosswalks
- Reference Data

Valid Values

You can view codesets as valid values in erwin DI Business User Portal (BUP). The Valid Values tab displays a list of codesets and you can easily navigate through the list using advance filter mechanisms to view the required codesets. It is possible to analyze code value details and code mappings for each code in the list.

You can view codeset details under the Valid Values tab.



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 Reference Data topic.

To view code mappings, click . For more information on viewing code mappings, refer to the Code Mappings topic.

Code Value Details

Code value details refer to code name, code value, description of the code, and user defined details.

To view code value details, on the **Valid Values** tab, click the required <Code_Name>.

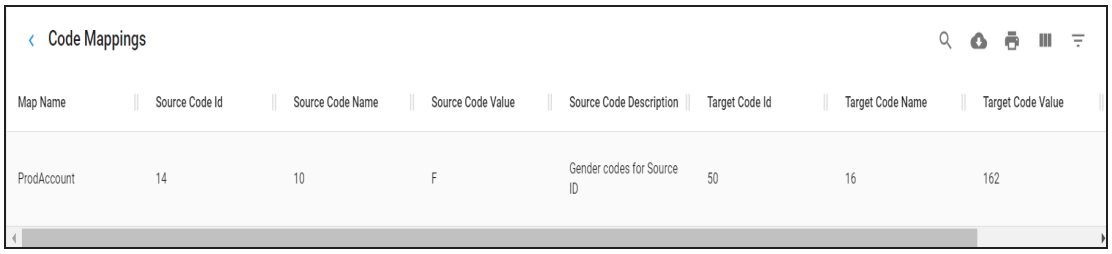
The Value Value Details page appears with the Code Value Details and User Defined Details sections.

Code Mappings

Code mappings include details of source and target codesets.

To view code mappings, on the **Valid Values** tab, click for the required code.

The Code Mappings page appears. It displays a list of code mappings.



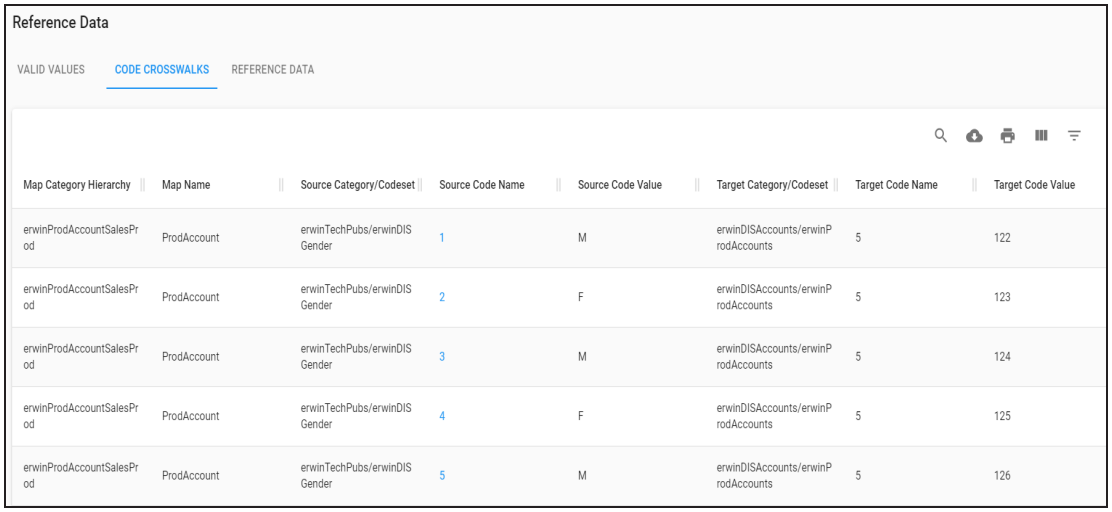
You can use the filter and export options to work on the list. For more information on the filter and export options, refer to the Reference Data topic.

Code Crosswalks

You can view a list of code crosswalks in a grid view and navigate across the list using the advance filter mechanisms.

You can also view details of each code crosswalks that includes source and target details.

To view code crosswalks, on the **Reference Data** page, click the **Code Crosswalks** tab.



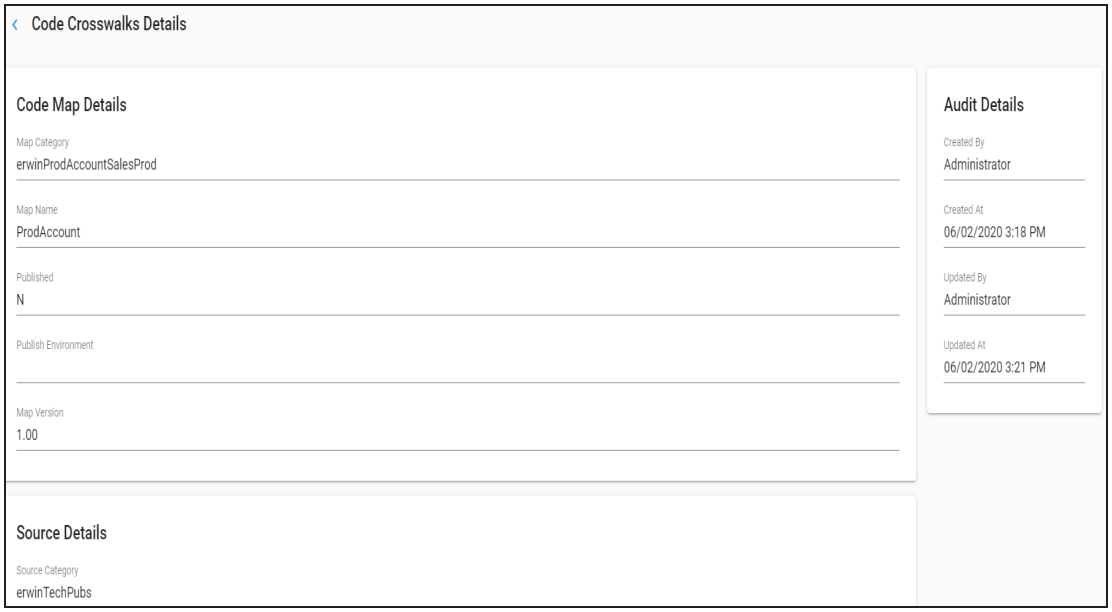
Map Category Hierarchy	Map Name	Source Category/Codeset	Source Code Name	Source Code Value	Target Category/Codeset	Target Code Name	Target Code Value
erwinProdAccountSalesProd	ProdAccount	erwinTechPubs/erwinDISGender	1	M	erwinDISAccounts/erwinProdAccounts	5	122
erwinProdAccountSalesProd	ProdAccount	erwinTechPubs/erwinDISGender	2	F	erwinDISAccounts/erwinProdAccounts	5	123
erwinProdAccountSalesProd	ProdAccount	erwinTechPubs/erwinDISGender	3	M	erwinDISAccounts/erwinProdAccounts	5	124
erwinProdAccountSalesProd	ProdAccount	erwinTechPubs/erwinDISGender	4	F	erwinDISAccounts/erwinProdAccounts	5	125
erwinProdAccountSalesProd	ProdAccount	erwinTechPubs/erwinDISGender	5	M	erwinDISAccounts/erwinProdAccounts	5	126

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 Reference Data topic.

You can view code crosswalks details for each source code.

To view code crosswalks details, in the **Code Crosswalks** grid, click <Source_Code_Name>.

The Code Crosswalks Details page appears. It displays Code Map Details, Source Details, and Target Details sections.

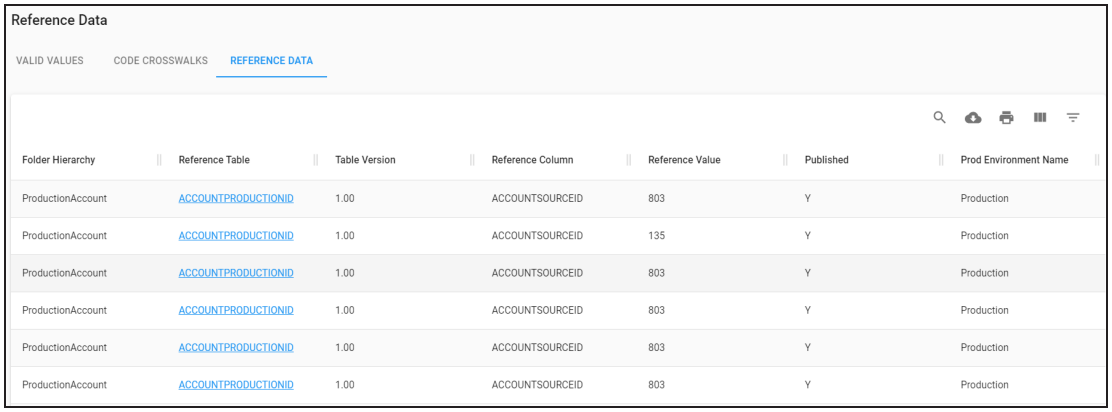


Reference Data

You can view your reference data under the Reference Data tab in a grid view. It includes folder hierarchy, reference tables, reference columns, and so on.

To view reference data, on the **Reference Data** page, click the **Reference Data** tab.

The list of reference data appears in a grid.

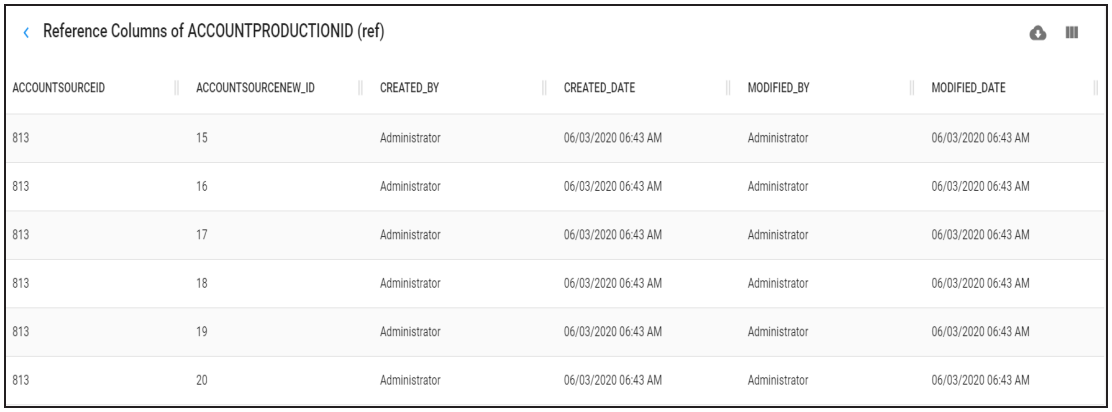


You can use the filter and export options to work on the list. For more information on the filter and export options, refer to the Reference Data topic.

You can view reference columns of a reference tables and download it in the XLSX format.

To view reference columns, on the **Reference Data** tab, click the required <Reference_ Table>.

The Reference Columns of <Reference_Table> page appears. It displays the list of reference columns in the reference table.



ACCOUNTSOURCEID	ACCOUNTSOURCENEW_ID	CREATED_BY	CREATED_DATE	MODIFIED_BY	MODIFIED_DATE
813	15	Administrator	06/03/2020 06:43 AM	Administrator	06/03/2020 06:43 AM
813	16	Administrator	06/03/2020 06:43 AM	Administrator	06/03/2020 06:43 AM
813	17	Administrator	06/03/2020 06:43 AM	Administrator	06/03/2020 06:43 AM
813	18	Administrator	06/03/2020 06:43 AM	Administrator	06/03/2020 06:43 AM
813	19	Administrator	06/03/2020 06:43 AM	Administrator	06/03/2020 06:43 AM
813	20	Administrator	06/03/2020 06:43 AM	Administrator	06/03/2020 06:43 AM

Use the following options to work on the list:

Export as Excel ( )

Use this option to download the list of reference columns in the XLSX format.

Columns ( )

Use this option to select columns that you want to show in the grid. By default, all the columns appear as selected.