



## **erwin DI Business User Portal**

### **User Guide**

**Release v10.1**

## Legal Notices

This Documentation, which includes embedded help systems and electronically distributed materials (hereinafter referred to as the “Documentation”), is for your informational purposes only and is subject to change or withdrawal by erwin Inc. at any time. This Documentation is proprietary information of erwin Inc. and may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of erwin Inc.

If you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all erwin Inc. copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to erwin Inc. that all copies and partial copies of the Documentation have been returned to erwin Inc. or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, ERWIN INC. PROVIDES THIS DOCUMENTATION “AS IS” WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL ERWIN INC. BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF ERWIN INC. IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is erwin Inc.

Provided with "Restricted Rights." Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19 (c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2020 erwin Inc. All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

## 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/>.

### Provide Feedback

If you have comments or questions, or feedback about erwin product documentation, you can send a message to [distechpubs@erwin.com](mailto:distechpubs@erwin.com).

### erwin Data Modeler News and Events

Visit [www.erwin.com](http://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.

# Contents

---

<b>Legal Notices</b> .....	<b>2</b>
<b>Contents</b> .....	<b>5</b>
<b>Introduction</b> .....	<b>6</b>
Architecture .....	6
User Interface .....	7
Home Page .....	9
Dashboard .....	11
<b>Quick Start</b> .....	<b>15</b>
On-boarding Users .....	15
Metadata .....	19
Systems .....	19
Environments .....	21
Tables .....	24
Columns .....	26
Mappings .....	28
Business Terms .....	30
Reference Data .....	32
Releases .....	33
Requirements .....	34
Reports .....	35

## Introduction

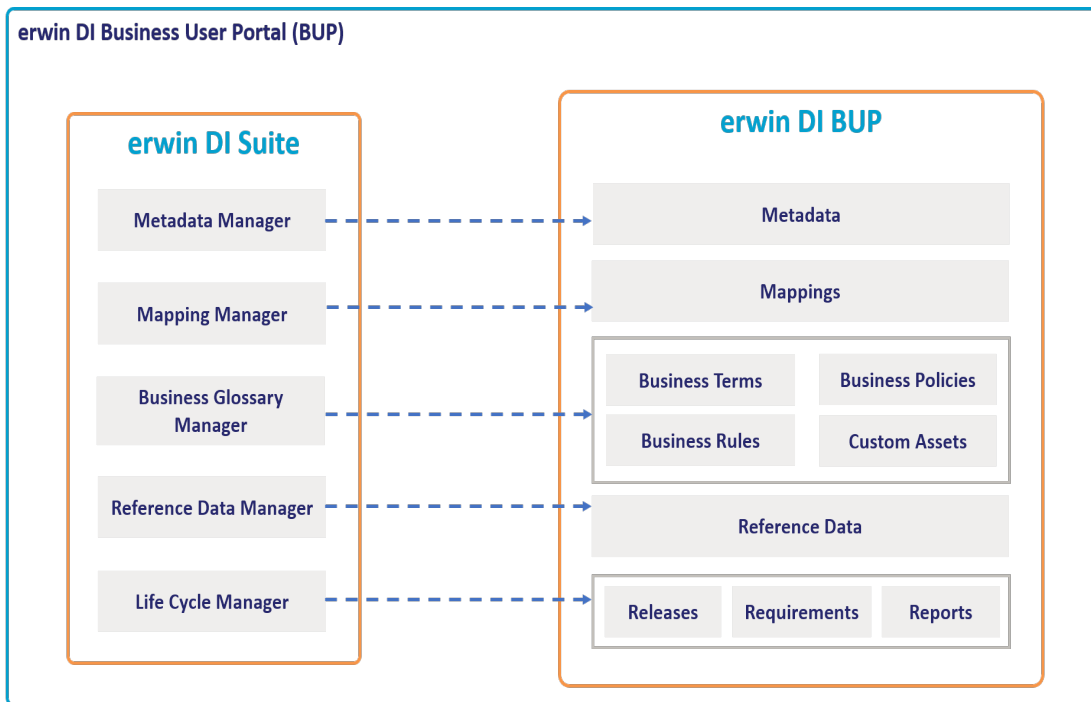
erwin DI Business User Portal (BUP) is a self-service, read-only portal targeted at business users. It provides you with an easy way to access data governance and management information stored in erwin Data Intelligence Suite (DI Suite). It has flexible search and filter mechanisms, which make analysis and decision making easy for you.

This section introduces you to erwin DI BUP [architecture](#) and [user interface \(UI\)](#).

## Architecture

To get you started, this topic gives you an overview of erwin DI BUP architecture and its modules. You can integrate erwin Data Intelligence Suite (DI Suite) with erwin DI BUP and access the all the information stored in erwin DI Suite.

The following diagram shows a high-level modular architecture of the application.



The following table gives an overview of erwin DI BUP modules and their functions.

<b>Modules</b>	<b>Function</b>
<a href="#">Metadata</a>	It displays the scanned or imported metadata, and its associations, lineage, mappings, and mind maps.
<a href="#">Mappings</a>	It displays mapping projects, mapping specifications, test specifications, and source and target details.
<a href="#">Business Terms</a>	It displays business terms, their associations, and mind maps.
<a href="#">Business Policies</a>	It displays business policies, their associations, and mind maps.
<a href="#">Business Rules</a>	It displays business rules, their associations, and mind maps.
<a href="#">Custom Assets</a>	It displays custom asset types, custom object details, associations, and mind maps.
<a href="#">Reference Data</a>	It displays codesets as valid values, code crosswalks, and reference data.
<a href="#">Releases</a>	It displays release projects, release details, and release object details.
<a href="#">Requirements</a>	It displays requirement projects and their details.
<a href="#">Reports</a>	It displays reports that and their details.

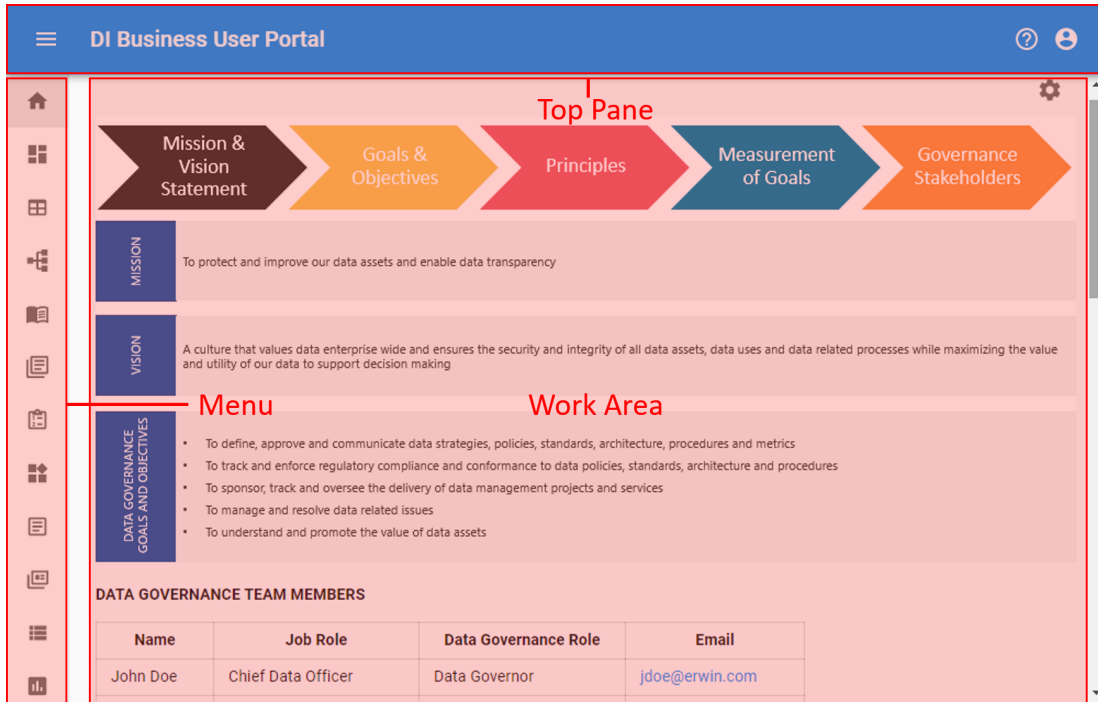
## User Interface




To get you started with using erwin DI Business User Portal (BUP), this topic walks you through the erwin DI BUP UI, its components, and their functions.

Once you have installed erwin DI BUP, follow these steps to access and use it:

1. Open erwin DI BUP.  
The Login page appears.
2. Enter your credentials to log on to erwin DI BUP.
3. Click **Login**.

After successful log in, the [Home page](#) appears.

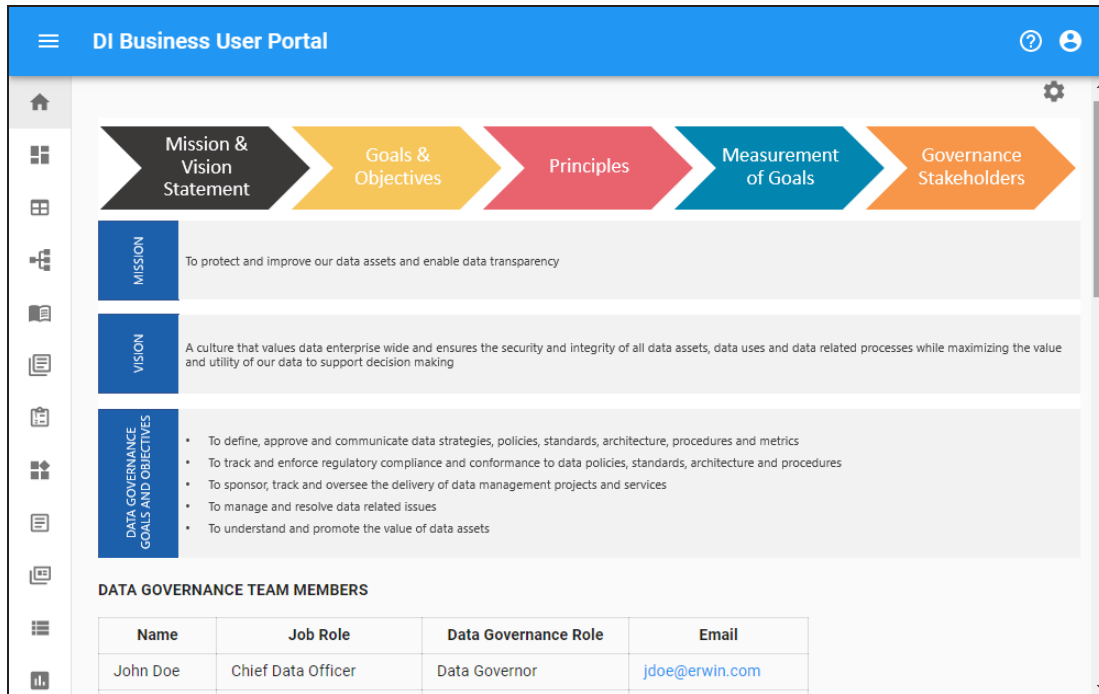


UI Section	Icon	Function
Top Pane		<b>Application Menu:</b> Click this icon to expand the menu and access modules.
		Click this icon to use the following options: <ul style="list-style-type: none"> <li>▪ <b>Help:</b> Access online help</li> <li>▪ <b>Feedback:</b> Access erwin User Community</li> <li>▪ <b>About:</b> View product and license information. You can also update and activate your license here.</li> </ul>
		Click this icon to use the following options: <ul style="list-style-type: none"> <li>▪ <b>Account:</b> View user accounts and change the password</li> <li>▪ <b>Administration:</b> Manage users and roles</li> <li>▪ <b>Logout:</b> Log out</li> </ul>
Menu		Use this pane to access modules.
Work Area		Based on your selection on the menu, use this area to view or work on the data.



# Home Page

The Home page is a configurable wiki-like landing page, where you can display key information for business users, important images, hyperlinks, text, and more.



To configure the Home page, follow these steps:

1. Click .

Markdown Guide.' Below this is a 'WRITE' tab and a 'PREVIEW' tab. A rich text editor toolbar is visible with icons for bold, italic, link, unlink, quote, code, image, list, and indent. The editor content shows markdown for a heading, a link, line breaks, a bolded section title, and a table." data-bbox="177 120 852 406"/>

```
## Welcome to the erwin Business User Portal

[Click Here](www.erwin.com) to go to the erwin Sharepoint portal.


<br>
<br>

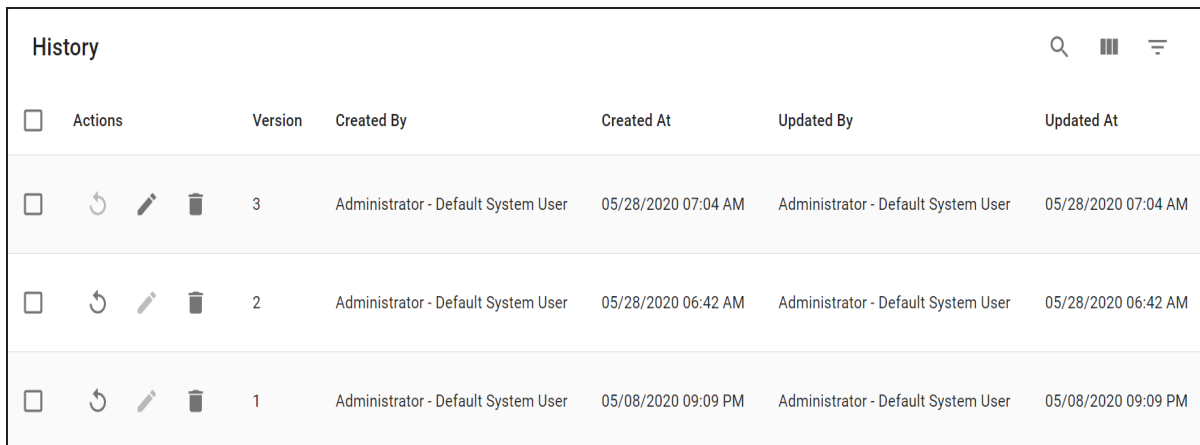
**Key Data Governance Stakeholders**










| Name | Job Role | Data Governance Role | Email |
|-----|-----|-----|-----|
| John Doe | Chief Data Officer | Data Governor | jdoe@erwin.com |
| Jane Doe | Chief Compliance Officer | Chief Data Officer | janedoe@erwin.com |
| Steve Smith | VP, Business Compliance | Data Governance Advisor | janedoe@erwin.com |
| Mike Adams | Director of Accounting | Lead Data Steward | janedoe@erwin.com |

<br>
[Click Here](www.erwin.com) to go to the erwin Data Governance Site.
```

2. On the **Write** tab, use Markdown syntax to edit the page.  
For information about Markdown, refer to the [Markdown Guide](#).
3. Click the **Preview** tab to preview your changes.
4. Click **Save**.

You can view the history of changes made to the Home page. To view the history of changes, click .



Actions	Version	Created By	Created At	Updated By	Updated At
  	3	Administrator - Default System User	05/28/2020 07:04 AM	Administrator - Default System User	05/28/2020 07:04 AM
  	2	Administrator - Default System User	05/28/2020 06:42 AM	Administrator - Default System User	05/28/2020 06:42 AM
  	1	Administrator - Default System User	05/08/2020 09:09 PM	Administrator - Default System User	05/08/2020 09:09 PM

Use the following options to work on the History:

### Search ()

Use this option to search through history.

### View Columns ()

Use this option to select columns that you want to display in the grid. By default, all columns are selected.

### Filter Table ()

Use this option to filter the required rows based on:

- Version
- Created By
- Created At
- Updated By
- Updated At


### Revert ()

Use this option to restore the page to a specific version in the history. This option is not available for the latest version.

### Edit ()

Use this option to edit the Home page. This option is available only for the latest version.

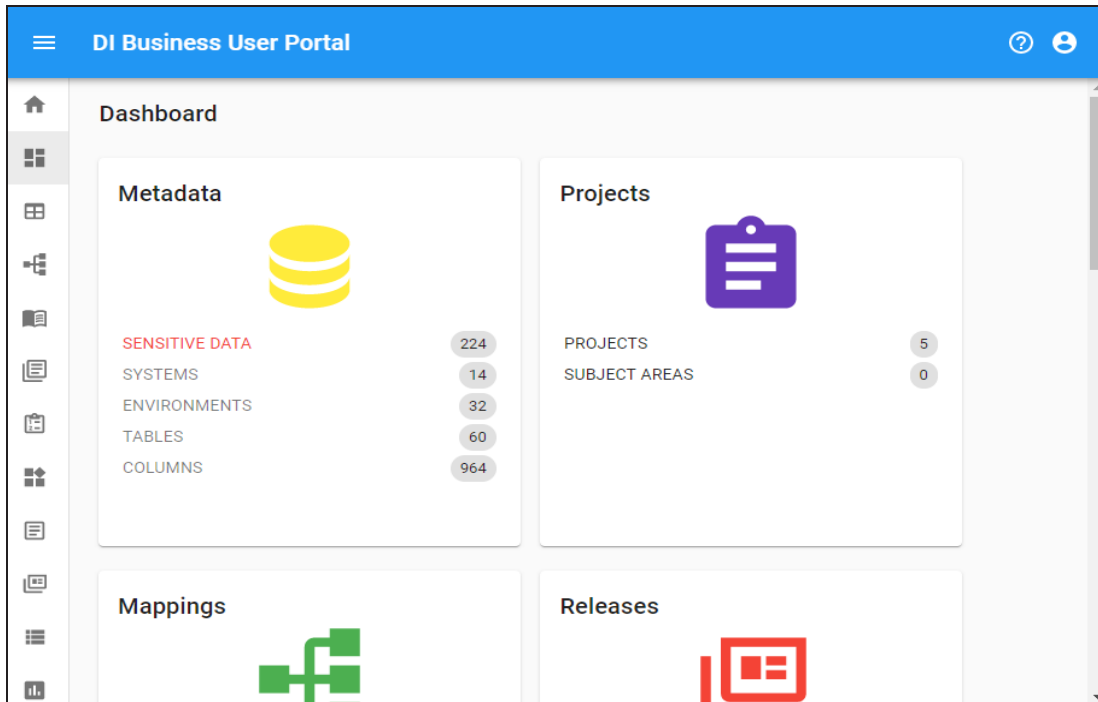
### Delete ()

Use this option to delete a version. You can also select multiple versions and click  at the top-right corner.

## Dashboard

The dashboard displays a snapshot of information based on the data catalog and module availability that you have configured in erwin Data Intelligence Suite (DI Suite). It displays this information in the card format. For more information on data availability, refer to the [Configuring Data Catalog Availability](#) and [Configuring Module Availability](#) topics.

To access dashboard, on the menu, click  **Dashboard**. The Dashboard page appears.



Each card is click-able and displays a collection of information points that provides a snapshot of the underlying data.

### Metadata

It displays the number of technical assets that are classified as sensitive, and number of systems, environments, tables, and columns. Click an information point to view more information about it. For example, to view a list of systems, on the card, click **Systems**.

For more information on viewing metadata, refer to the [Metadata](#) section.

### Projects

It displays the number of projects and subject areas available. Click the card to view a list of projects and details, such as mapping specifications and test specifications.

For more information on viewing mappings, refer to the [Mappings](#) topic.

### Mappings

It displays the number of active and published mappings. Click the card to view a list

of active and published mappings.

For more information on viewing mappings, refer to the [Mappings](#) topic.

### **Releases**

It displays the number of projects and releases. Click the card to view a list of projects and releases.

For more information on viewing releases, refer to the [Releases](#) topic.

### **Codes and Crosswalks**

It displays the number of codesets, code values, and code crosswalks. Click the card to view a list and details about reference data.

For more information on viewing reference data, refer to the [Reference Data](#) section.

### **Glossary of Terms**

It displays the number of business term catalogs, data stewards, and business terms. Click the card to view a list and details about business terms.

For more information on viewing business terms, refer to the [Business Terms](#) section.

### **Business Policies**

It displays the number of business policy catalogs, data stewards, and business policies. Click the card to view a list and details about business policies.

For more information on viewing business policies, refer to the [Business Policies](#) section.

### **Business Rules**

It displays the number of business rule catalogs, data stewards, and business rules. Click the card to view a list and details about business rules.

For more information on viewing business rules, refer to the [Business Rules](#) section.

### **Requirements**

It displays the number of requirement projects and specification documents. Click the card to view a list and details about requirements.

For more information on accessing requirements, refer to the [Requirements](#) topic.

### **Reports**

It displays the number of categories and reports. Click the card to reports in grid and

chart form.

For more information on accessing reports, refer to the [Reports](#) topic.

## Quick Start

This section gives you hands-on experience of erwin DI Business User Portal (BUP). It helps you in navigating across erwin DI BUP modules.

As an administrator, you start with [on-boarding users](#).

As a business user, based on your configuration, you view and use data governance and management information using the following modules:

- [Metadata](#)
- [Mappings](#)
- [Business Terms](#)
- [Reference Data](#)
- [Releases](#)
- [Requirements](#)
- [Reports](#)

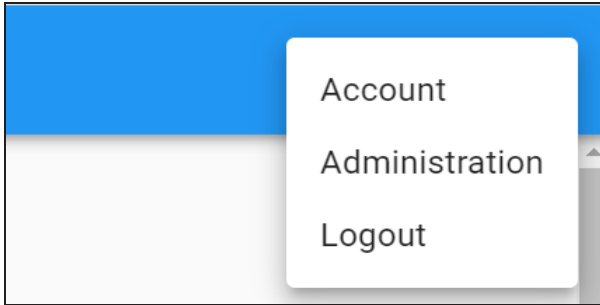
## On-boarding Users

You can on-board users by registering them on erwin DI Business User Portal (BUP). A registration request is sent to users on their email ID. Users can complete registration using the registration form or you can complete the registration on their behalf.

To create registration requests, follow these steps:

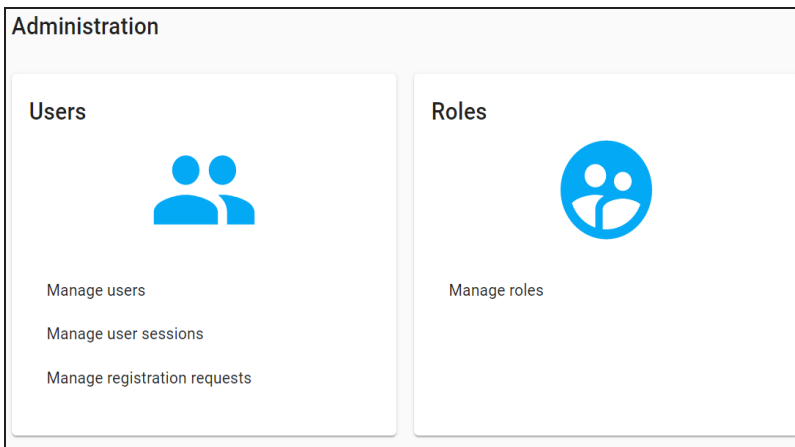
1. In the top pane, click .

The following options appear.



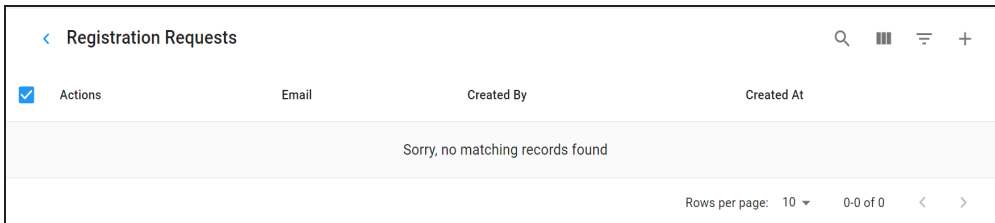
2. Click **Administration**.

The Administration page appears.



3. Under the **Users** section, click **Manage Registration Requests**.

The Registration Requests page appears.



4. Click **+**.

The Send Registration Request page appears.



### Send Registration Request

Please provide email address to send the registration request.

Email Address \*

Email

**CANCEL** SAVE


5. Enter an **Email Address** and click **Save**.

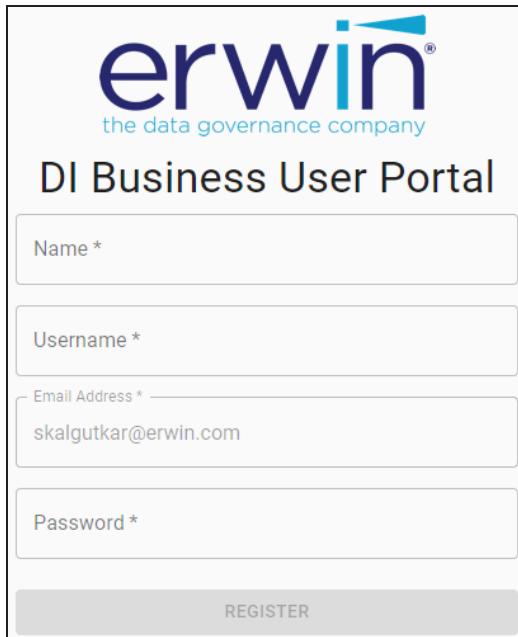
A registration request is sent to the email address and it is saved in Registration Requests. Users can complete the registration using the request.

<input type="checkbox"/>	Actions	Email	Created By	Created At
<input type="checkbox"/>		sojha@erwin.com	Administrator - Default System User	05/27/2020 09:16 AM

Rows per page: 10 ▾ 1-1 of 1 < >

To complete registration on behalf of users, follow these steps:

1. Click  to open the registration form.



erwin<sup>®</sup>  
the data governance company

## DI Business User Portal

Name \*

Username \*

Email Address \*  
skalgutkar@erwin.com

Password \*

REGISTER

2. Specify user's **Name**, **Username**, **Email Address**, and **Password**.
3. Click **Register**.

Use the following options to work on registration requests:

### Search ()

Use this option to search the registration requests.

### View Columns ()

Use this option to select columns that you want to display in the grid. By default, all columns are selected.

### Filter Table ()

Use this option to filter rows based on:

- Email
- Created By
- Created At

You can assign roles to users depending on the tasks required to be performed by them. For more information on configuring user accounts, refer to the [Configuring User Accounts](#) section.

## Metadata

You can access all your scanned or imported metadata in a hierarchy, System > Environment > Table > Column. You can view their associations, lineage, mappings, impact, mind maps and so on.

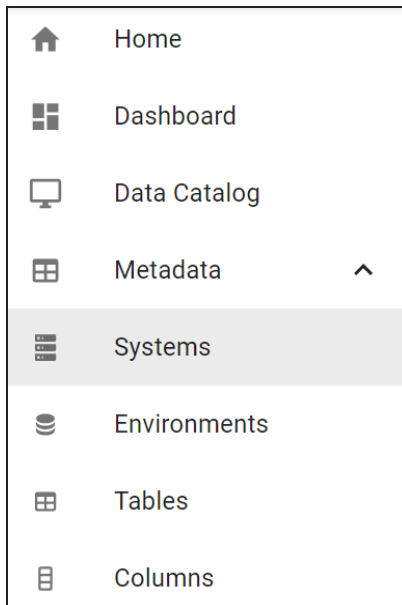
## Systems

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

To access the Systems grid follow these steps:

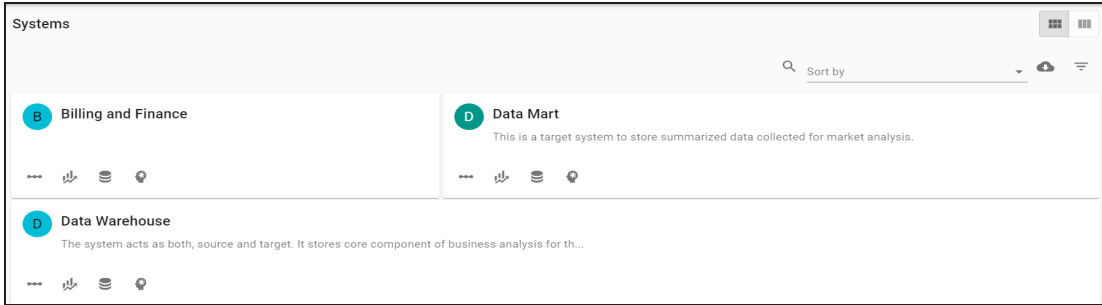
1. In the menu, expand the **Metadata** node.

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



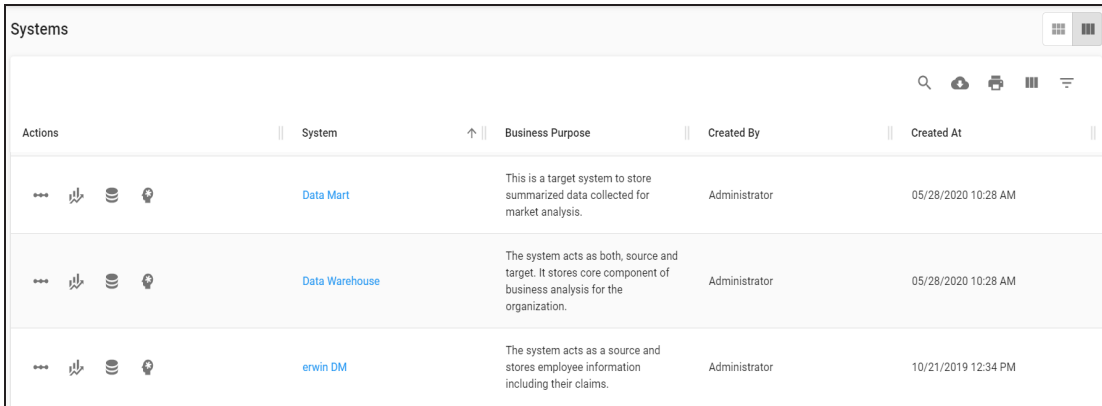
2. Click **Systems**.

By default, the Systems card view appears.



3. Click .

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



Use the following options to work on the Systems grid:

**Search** ()

Use this option to filter the required rows.

**Export as Excel** ()

Use this option to download the list of systems in .xlsx format.

**Print** ()

Use this option to print the list of systems.

**Columns** ()

Use this option to select columns, which you want to show in the Systems 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.

### Filter Table ( )

Use this option to filter the required rows based on:

- System
- Business Purpose
- Created By
- Created At

For more information on viewing system details, associations, lineage, and mind maps refer to the [Systems](#) section.

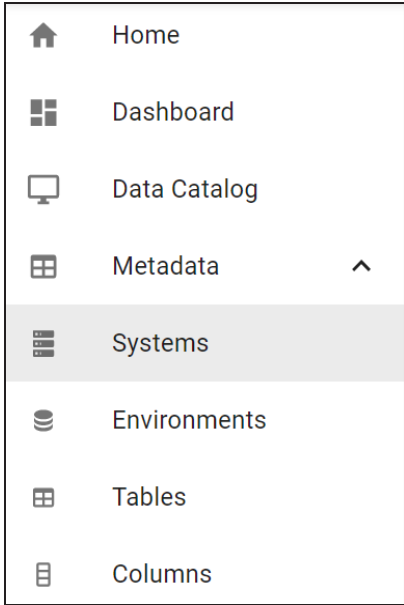
## Environments

erwin DI Business User Portal (BUP) gives you access to view lineage, impact analysis, tables, mind map and associations of an environment. The Environments grid displays a list of all the environments and you can easily navigate through the grid 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 grid, follow these steps:

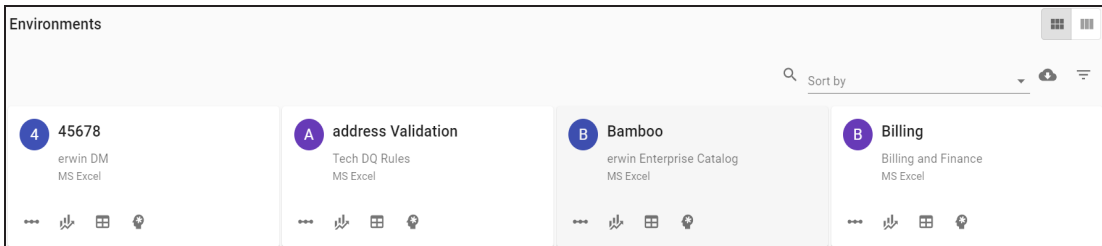
1. In the menu, expand the **Metadata** node.

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



2. Click **Environments**.

By default, the Environments card view appears.



3. Click .

The Environments grid appears. It displays a list of environments. You can click <Environment\_Name> and <System\_Name> to view their details.

Environments							
<input type="text"/> X <span style="float: right;"> <input type="text"/> <input type="button" value="Export"/> <input type="button" value="Print"/> <input type="button" value="Columns"/> <input type="button" value="Filter"/> </span>							
Actions	Environment	System	Environment Type	DBMS Name	DBMS Schema Name	IP Address	
<input type="button" value="Expand"/> <input type="button" value="Refresh"/> <input type="button" value="Grid"/> <input type="button" value="Lightbulb"/>	Customer Order Entry	SQL System	test	MS Excel File			
<input type="button" value="Expand"/> <input type="button" value="Refresh"/> <input type="button" value="Grid"/> <input type="button" value="Lightbulb"/>	DM Landing	erwin DM	test	ERWin XML File			
<input type="button" value="Expand"/> <input type="button" value="Refresh"/> <input type="button" value="Grid"/> <input type="button" value="Lightbulb"/>	erwinSales	SQL System	dev	DIS10	dbo	localhost	

Use the following options to work on the Environments grid:

### Search (🔍)

Use this option to filter the required rows.

### Export as Excel (📄)

Use this option to download the list of environment in .xlsx format.

### Print (🖨️)

Use this option to print the list of environments.

### Columns (☰)

Use this option to select columns, which you want to show in the Environments 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.

### Filter Table (☰)

Use this option to filter the required rows based on:

- Environment
- System
- Environment Type

- DBMS Name
- DBMS Schema Name
- IP Address
- Port
- Last Loaded Date
- Version
- Version Label

For more information on environment details, its associations, lineage, and mind maps refer to the [Environments](#) section.

## Tables

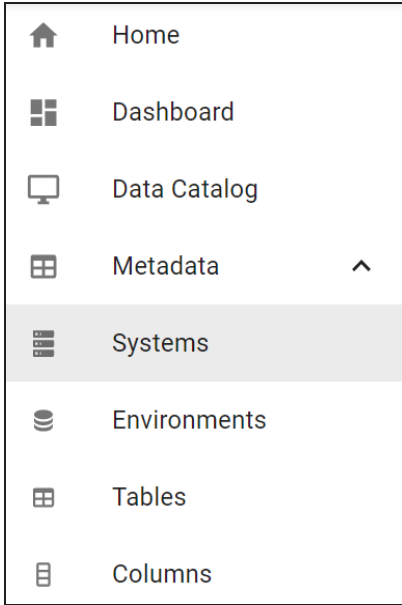
erwin DI Business User Portal (BUP) gives you access to view mappings, lineage, impact analysis, columns, mind map and associations of a table. The Tables grid displays all the tables and you can easily navigate through the grid using advance filtering mechanisms to find the required table. You can also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

To access the Tables 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 **Tables**.

The Tables grid appears. It displays a list of tables. You can click <Table\_Name>, <System\_Name>, and <Environment\_Name> to view their details.

Tables									
Actions	Table	System	Environment	Logical Table	Table Expanded Logical ...	Table Type			
	Account	TABLEAU	PRESENTATION LAYER	Account_Details	Emp_Account_Details	TABLE			
	Citizens	erwin DM	DM Landing	Citizens		TABLE			
	Claim	erwin DM	DM Staging	Claim		TABLE			

Use the following options to work on the Systems grid:

**Search** (🔍)

Use this option to filter the required rows.

**Export as Excel** (📄)

Use this option to download the list of tables in .xlsx format.

### Print

Use this option to print the list of tables.

### Columns

Use this option to select columns, which you want to show in the Tables 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.

### Filter Table

Use this option to filter the required rows based on:

- Table
- System
- Environment
- Logical Table
- Table Expanded Logical Name
- Table Type
- Workflow Status

For more information on table details, its associations, lineage, mappings, and mind maps, refer to the [Tables](#) section.

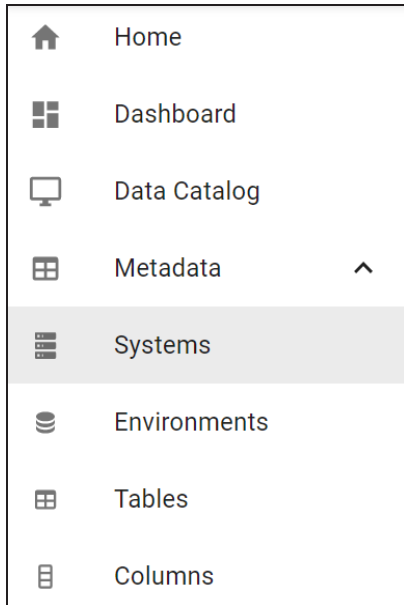
## Columns

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.

A screenshot of the 'Columns' grid. The grid has a header row with columns: Actions, System, Environment, Table, Logical Table, Table Expanded Logical, Column, and Logical Column. Below the header are six rows of data. Each row contains icons for actions (edit, delete, refresh, etc.) followed by the column name and its details.

Actions	System	Environment	Table	Logical Table	Table Expanded Logical ...	Column	Logical Column
...	TABLEAU	PRESENTATION LAYER	Account	Account_Details	Emp_Account_Details	Acct_Atm_Status	
...	TABLEAU	PRESENTATION LAYER	Account	Account_Details	Emp_Account_Details	Acct_Cod_Ccy	
...	TABLEAU	PRESENTATION LAYER	Account	Account_Details	Emp_Account_Details	Acct_Prod_Source_Id	Production_S...
...	TABLEAU	PRESENTATION LAYER	Account	Account_Details	Emp_Account_Details	Cod_Acct_No	
...	TABLEAU	PRESENTATION LAYER	Account	Account_Details	Emp_Account_Details	Number of Records	
...	Staging	Stage	POS			LCUR	

Use the following options to work on the Columns grid:

**Search** (🔍)

Use this option to filter the required rows.

### Export as Excel ()

Use this option to download the list of tables in .xlsx format.

### Print ()

Use this option to print the list of tables.

### Columns ()

Use this option to select columns, which you want to show in the Columns 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.

### Filter Table ()

Use this option to filter the required rows based on:

- System
- Environment
- Table
- Logical Table
- Table Expanded Logical Name
- Column
- Logical Column
- Column Expanded Logical Name
- Data Type

For more information on columns, its associations, mappings, lineage, and mind maps refer to the [Columns](#) section

## Mappings

erwin DI Business User Portal (BUP) gives you access to all the mappings. The Mappings grid displays all the mappings and you can easily navigate through the grid using advanced filtering mechanisms to find the required mapping. You can view mapping details with additional mapping information and analyze each mapping specification by viewing source,

target, and transformation details. You can also view test specifications related to mappings.

To access the Mappings grid, on the menu, click **Mappings**.

The Mappings grid appears. You can click <Mapping\_Name> and <Column\_Name> to view their details.

Project/Subject Hierarchy	Mapping	Mapping Version	Published?	Source System/Env	Source Table Name	Source Column Name	Data Type
CRD - Data Catalog	<a href="#">Staging To Data Warehouse</a>	1	N	Staging/Stage	POSDET	<a href="#">MAL</a>	Numeric
CRD - Data Catalog	<a href="#">Data Warehouse To Data Mart</a>	1	N	Data Warehouse/Valuation	Holding	<a href="#">MV</a>	Numeric
CRD - Data Catalog	<a href="#">Hedge Fund Accounting To Order Managemnet</a>	1	N	Hedge Fund Accounting/Holdings	PD	<a href="#">MV</a>	Numeric
CRD - Data Catalog	<a href="#">IBOR Accounting To Hedge Fund Accounting</a>	1	N	IBOR Accounting/Investor	Position	<a href="#">POS_MV</a>	Numeric
CRD - Data Catalog	<a href="#">Order Management To Staging</a>	1	N	Order Management/IBOR	POS	<a href="#">MVAL</a>	Numeric
CRD - Data Catalog	<a href="#">Order Management To Staging</a>	1	N	Order Management/IBOR	POS	<a href="#">PCE</a>	Numeric

Use the following options to work on the grid:

**Search** (🔍)

Use this option to filter the required rows.

**Export as Excel** (📄)

Use this option to download the list of mappings in .xlsx format.

**Print** (🖨️)

Use this option to print the list of mappings.

**Columns** (☰)

Use this option to select columns, which you want to show in the Mappings 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.

**Filter Table** (☰)

Use this option to filter the required rows based on available options.

For more information on mapping details, specifications, and test specifications refer to the [Mappings](#) topic.

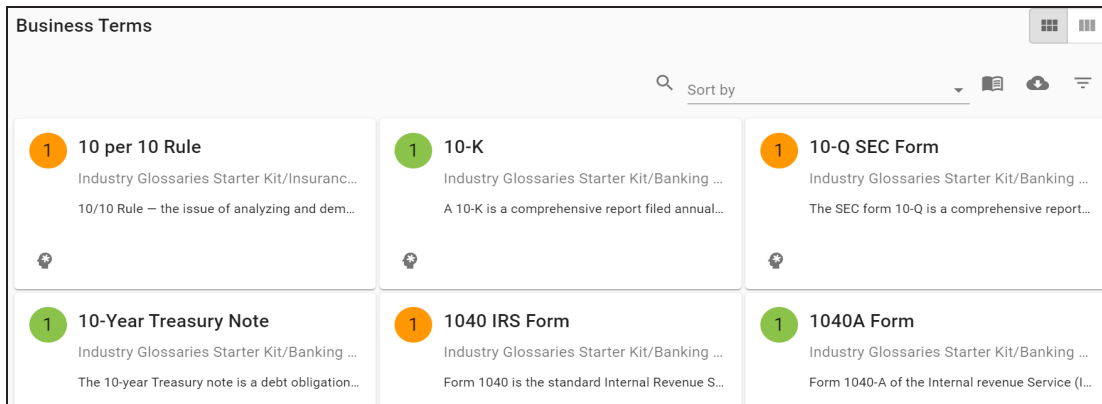
## Business Terms

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

To access the Business Terms grid, follow these steps:

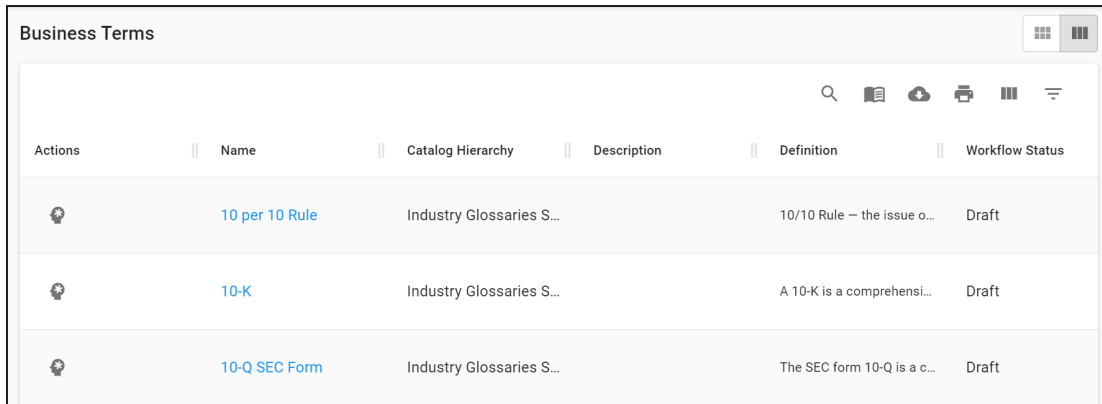
1. In the menu, click **Business Terms**.

By default, the Business Terms card view appears.



2. Click .

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



Actions	Name	Catalog Hierarchy	Description	Definition	Workflow Status
	10 per 10 Rule	Industry Glossaries S...		10/10 Rule – the issue o...	Draft
	10-K	Industry Glossaries S...		A 10-K is a comprehensi...	Draft
	10-Q SEC Form	Industry Glossaries S...		The SEC form 10-Q is a c...	Draft

Use the following options to work on the Business Terms grid:

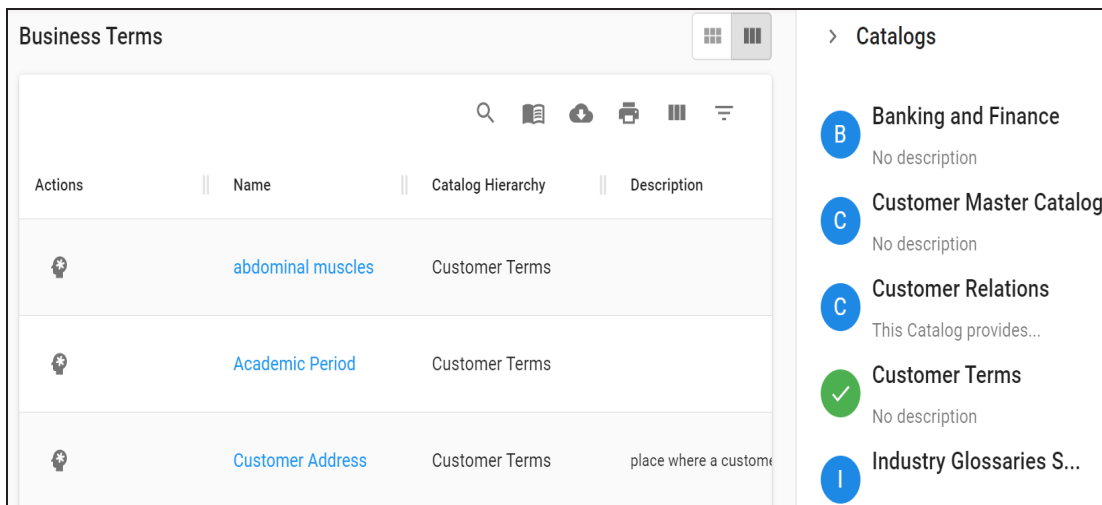
### Search

Use this option to filter the required rows.

### Catalogs

Use this option to filter the rows based on catalogs.

For example, in the following image, the Business Terms grid lists business terms in the Customer Terms catalog.



Actions	Name	Catalog Hierarchy	Description
	abdominal muscles	Customer Terms	
	Academic Period	Customer Terms	
	Customer Address	Customer Terms	place where a customer

> Catalogs

- Banking and Finance  
No description
- Customer Master Catalog  
No description
- Customer Relations  
This Catalog provides...
- Customer Terms  
No description
- Industry Glossaries S...

### Export as Excel

Use this option to download the list of business terms in the XLSX format.

## Print (🖨️)

Use this option to print the list of business terms.

## Columns (📊)

Use this option to select columns, which you want to show in the Business Terms grid. By default, all the columns are selected. You can clear the check boxes for the columns that are not required in the grid.

## Filter Table (🔍)

Use this option to filter the required rows based on the available options.

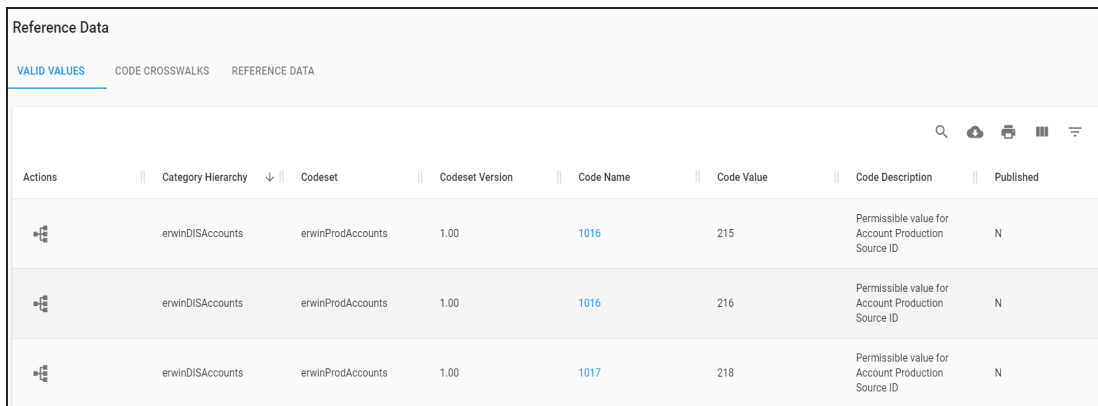
For more information on business terms and other business assets refer to the [Data Literacy](#) section.

## 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.



The screenshot shows the 'Reference Data' page with the 'VALID VALUES' tab selected. The table displays three rows of data with columns for Actions, Category Hierarchy, Codeset, Codeset Version, Code Name, Code Value, Code Description, and Published.

Actions	Category Hierarchy	Codeset	Codeset Version	Code Name	Code Value	Code Description	Published
	erwinDISAccounts	erwinProdAccounts	1.00	1016	215	Permissible value for Account Production Source ID	N
	erwinDISAccounts	erwinProdAccounts	1.00	1016	216	Permissible value for Account Production Source ID	N
	erwinDISAccounts	erwinProdAccounts	1.00	1017	218	Permissible value for Account Production Source ID	N

For more information on valid values, code crosswalks, and reference data refer to the [Reference Data](#) section.







## Releases

You can view all the release projects, release objects, and other release details in a form of grid. It is possible to navigate across the grid using advance filtering mechanisms and view the required row. You can further drill down to view project details, release details, and release object details.

To access the Releases grid, on the menu, click **Releases**.

The Releases page appears. It displays list of release objects in a grid format.

Releases										
Project	Release	Release Date	Release Owner	Release Object	Object Owner					
<a href="#">erwinTechPubs</a>	<a href="#">Alpha</a>	06/06/2020	janedoe	<a href="#">erwinProdAccounts</a>	Administrator					
<a href="#">erwinTechPubs</a>	<a href="#">Alpha</a>	06/06/2020	janedoe	<a href="#">Informatica_m_CBDR_BD M_CASA</a>	Administrator					
<a href="#">erwinTechPubs</a>	<a href="#">Alpha</a>	06/06/2020	janedoe	<a href="#">Account_Claims</a>	Administrator					

Use the following options to work on the grid:

### Search ()

Use this option to filter the required rows.

### Export as Excel ()

Use this option to download the list of release objects in .xlsx format.

### Print ()

Use this option to print the list of release objects.

### Columns ()

Use this option to select columns, which 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.

### Filter Table ()

Use this option to filter the required rows based on the available options.






For more information on project details, release details, and release object details refer to the [Releases](#) topic.

## Requirements

You can view projects, created to document requirements and analyze its life cycle. The Requirements grid informs about the specification document, its owner, hierarchy, status, and so on.

To view requirement projects, on the menu, click **Requirements**.

The Requirements page appears. It displays a list of projects in a grid.

Requirements											
Project Name	Hierarchy	Specification Doc	Specification Version	Description	Owner	Status					
<a href="#">erwinSalesProject</a>	erwinSalesProject/Prerequisites	Technical Prerequisites	1.00	This is to capture technical prerequisites to scan source metadata.	janedoe	Pending Review					
<a href="#">ProductionAccount</a>	ProductionAccount/SRS and FRS	Functional Requirements	1.00	This is to capture functional requirements of source to target mapping of the data integration project.	Administrator	Pending Review					

Use the following options to work on the grid:

### Search ()

Use this option to filter the required rows.

### Export as Excel ()

Use this option to download the list of projects in .xlsx format.

### Print ()

Use this option to print the list of projects.

### Columns ()

Use this option to select columns, which 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

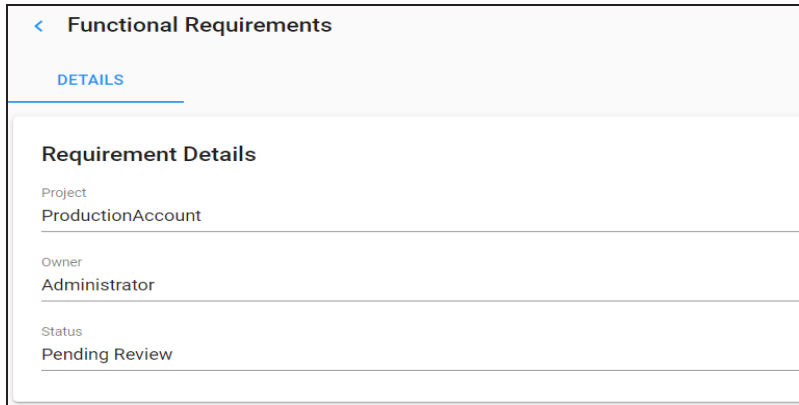
are not required in the grid.

### Filter Table ( )

Use this option to filter the required rows based on available options.

You can view project details, which includes its status and owner of the project.

To view project details, in the **Requirements** page, click <Project\_Name>.

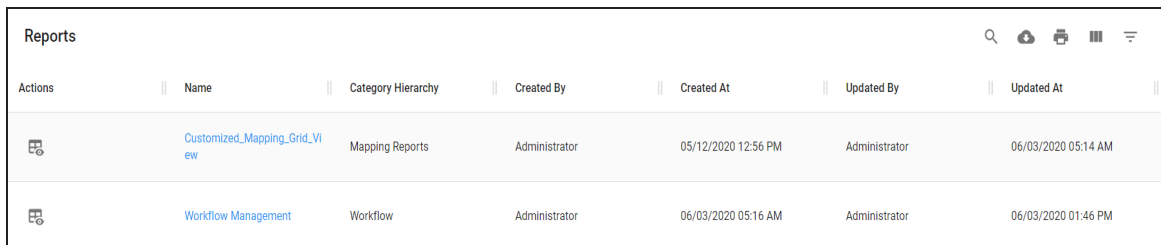


## Reports



You can view enabled and activated reports in DI Business User Portal (BUP). It is possible to view the SQL query used to generate reports and the output of the reports in grid and chart.

To view the reports, on the menu, click **Reports**.

The Reports page appears. It displays a list of reports in a grid.



The screenshot shows the 'Reports' page with a grid of reports. The grid has the following columns: Actions, Name, Category Hierarchy, Created By, Created At, Updated By, and Updated At. There are two reports listed:

Actions	Name	Category Hierarchy	Created By	Created At	Updated By	Updated At
	<a href="#">Customized_Mapping_Grid_View</a>	Mapping Reports	Administrator	05/12/2020 12:56 PM	Administrator	06/03/2020 05:14 AM
	<a href="#">Workflow Management</a>	Workflow	Administrator	06/03/2020 05:16 AM	Administrator	06/03/2020 01:46 PM

Use the following options to work on the grid:

### Search ( )

Use this option to filter the required rows.

**Export as Excel (  )**

Use this option to download the list of reports in .xlsx format.

**Print (  )**

Use this option to print the list of reports.

**Columns (  )**

Use this option to select columns, which 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.

**Filter Table (  )**

Use this option to filter the required rows based on available options.

For more information on report details and report output, refer to the [Reports](#) topic.