erwin DI Business User Portal

User Guide

Release v10.1

Legal Notices

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

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erwin Data Modeler News and Events

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Introduction

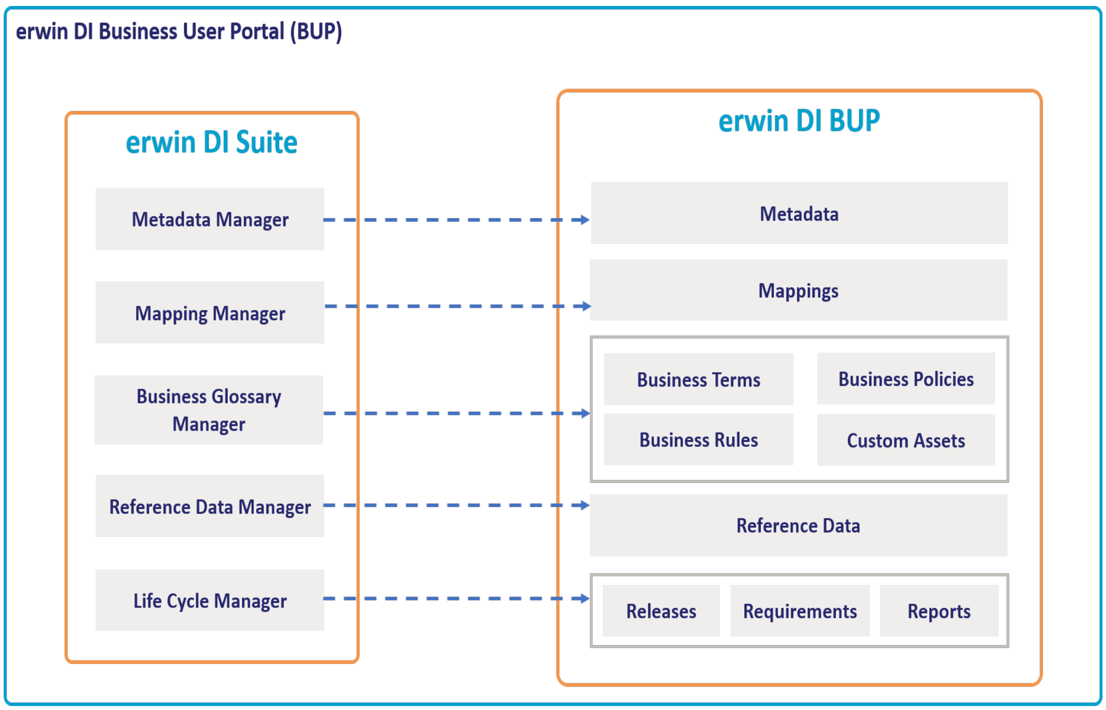
erwin DI Business User Portal (BUP) is a self-service, read-only portal targeted at business users. It provides you with an easy way to access data governance and management information stored in erwin Data Intelligence Suite (DI Suite). It has flexible search and filter mechanisms, which make analysis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

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

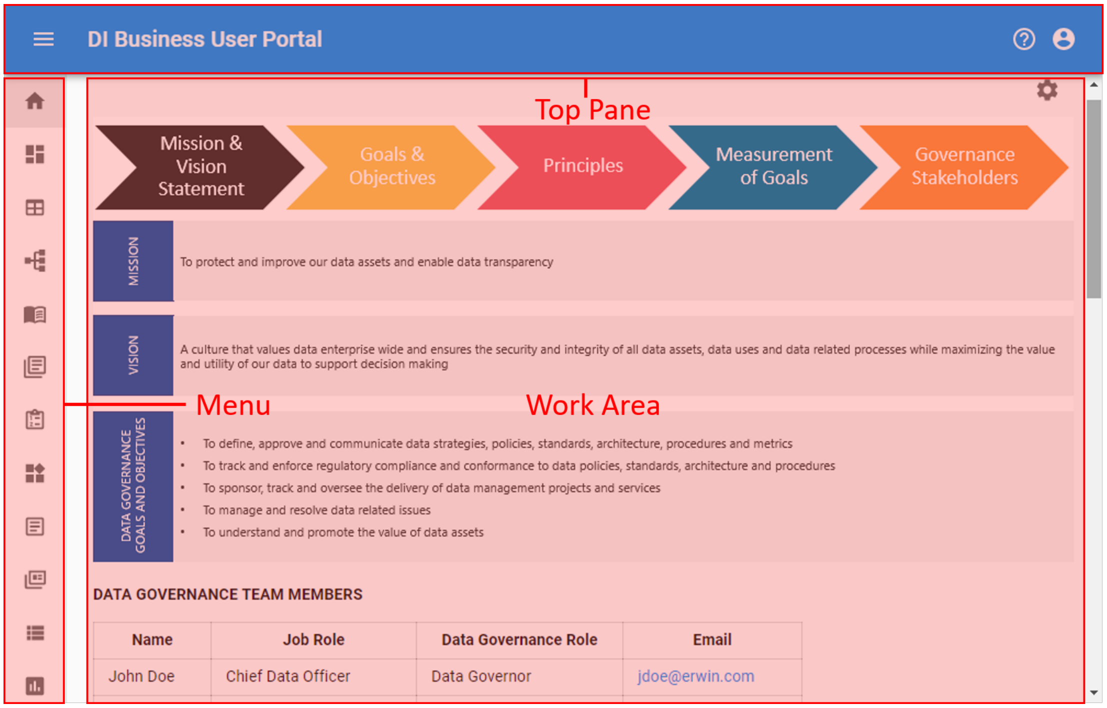
Once you have installed erwin DI BUP, follow these steps to access and use it:

1. Open erwin DI BUP.

   The Login page appears.

2. Enter your credentials to log on to erwin DI BUP.
3. Click **Login**.

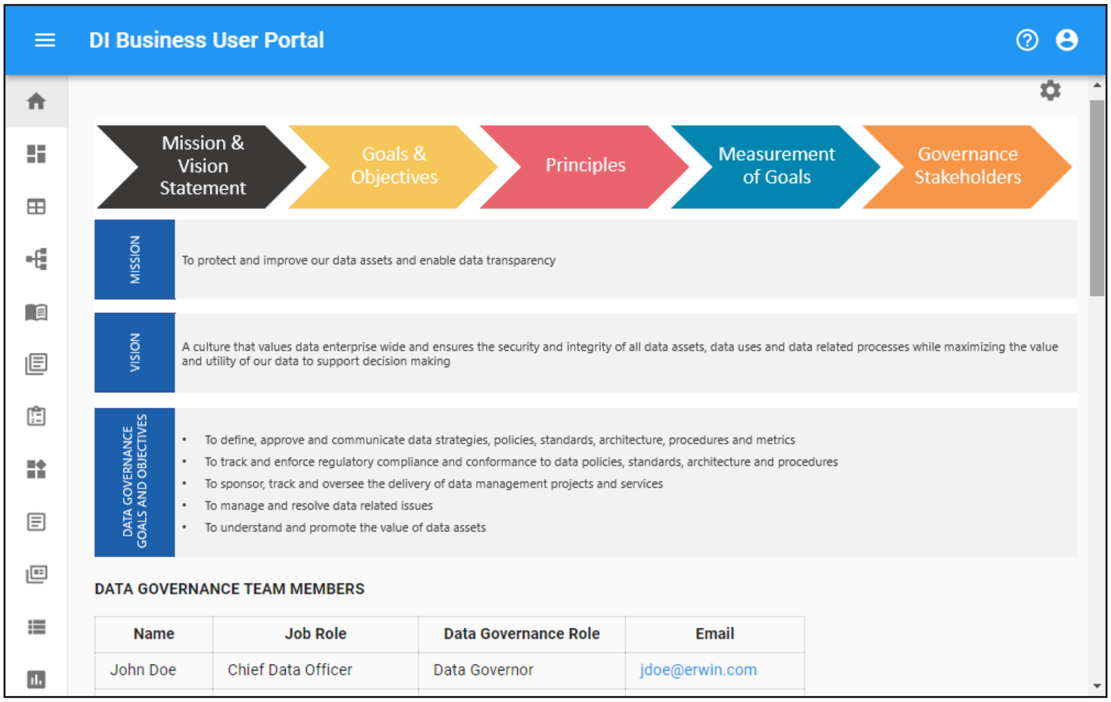
After successful log in, the Home page appears.



UI Section	Icon	Function
Top Pane		**Application Menu**: Click this icon to expand the menu and access modules.
		Click this icon to use the following options: ▪ **Help**: Access online help ▪ **Feedback**: Access erwin User Community ▪ **About**: View product and license information. You can also update and activate your license here.
		Click this icon to use the following options: ▪ **Account**: View user accounts and change the password ▪ **Administration**: Manage users and roles ▪ **Logout:** Log out
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.

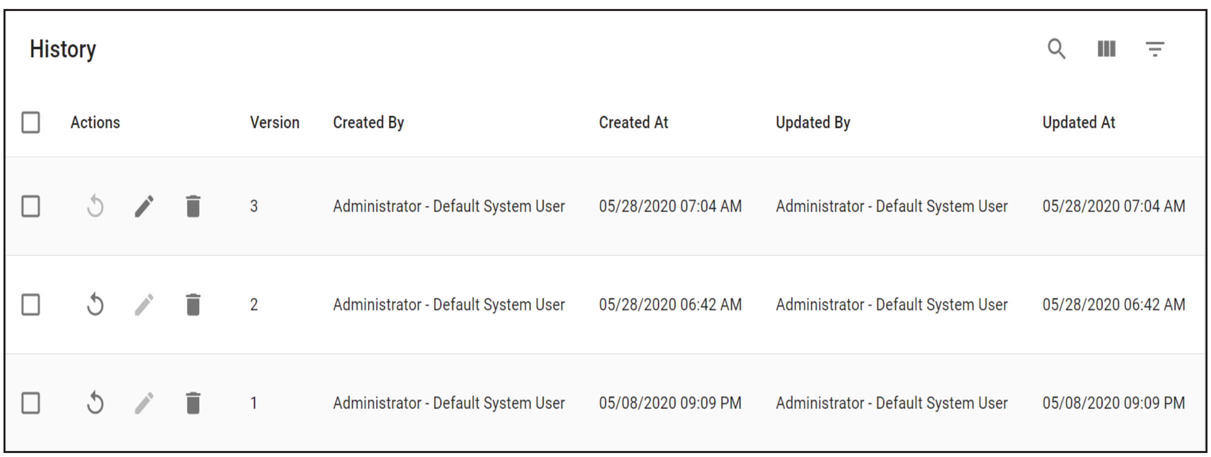


To configure the Home page, follow these steps:

1. Click .

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 .



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.

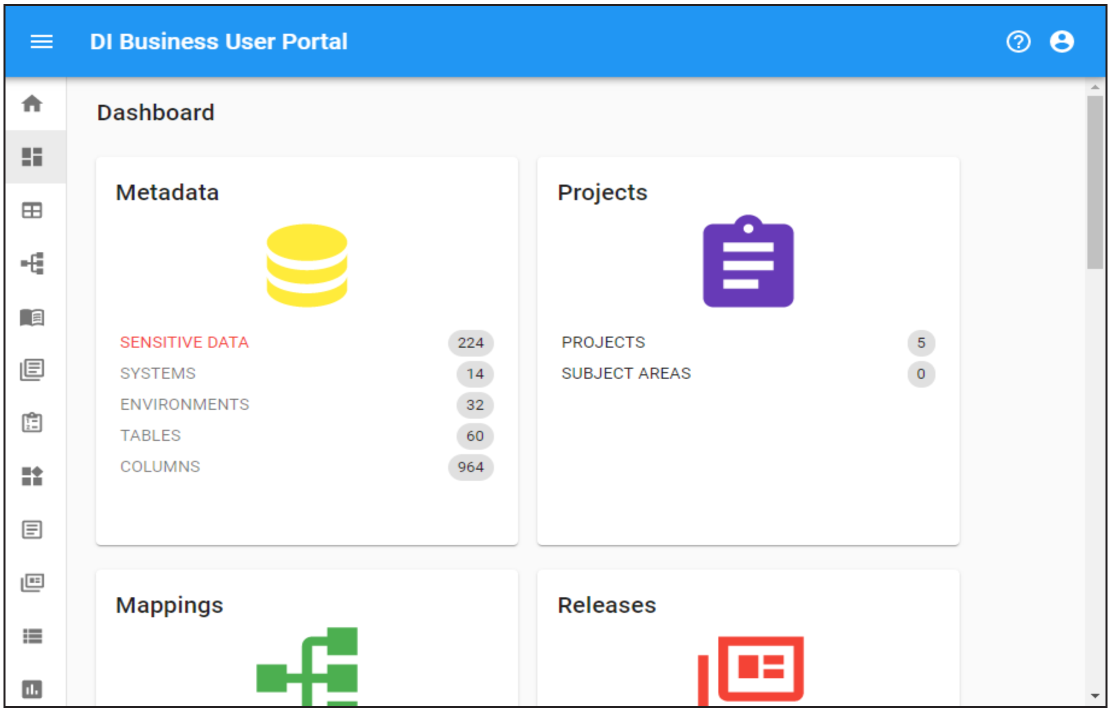
Delete ( )

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 snap-shot 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

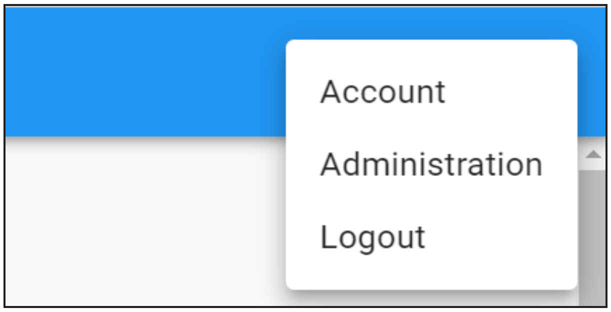
On-boarding Users

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:

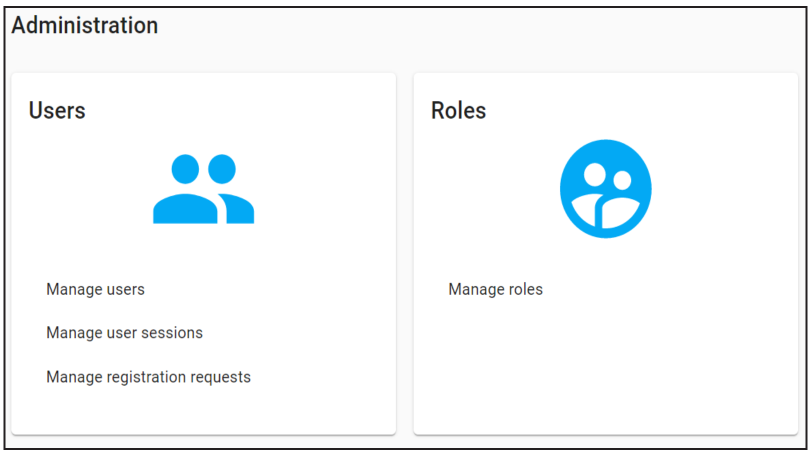
1. In the top pane, click .

   The following options appear.



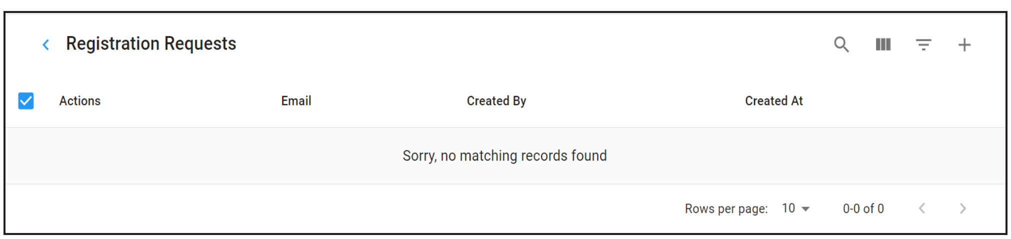
2. Click **Administration**.

   The Administration page appears.



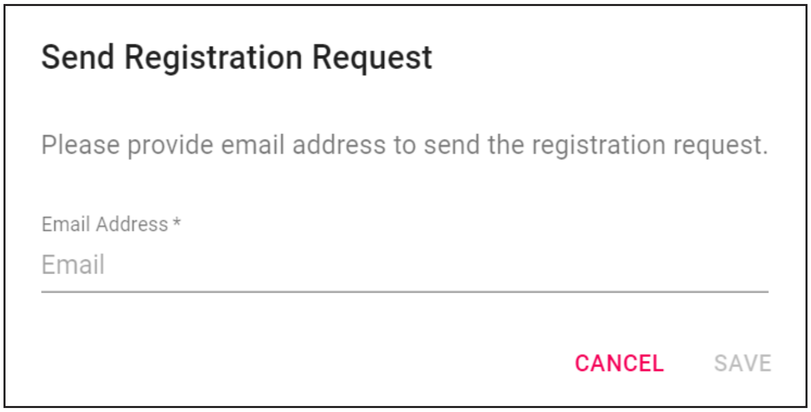
3. Under the **Users** section, click **Manage Registration Requests**.

   The Registration Requests page appears.



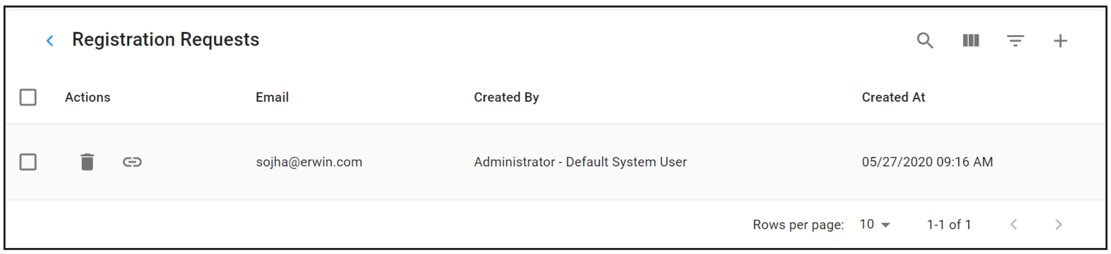
4. Click +.

   The Send Registration Request page appears.



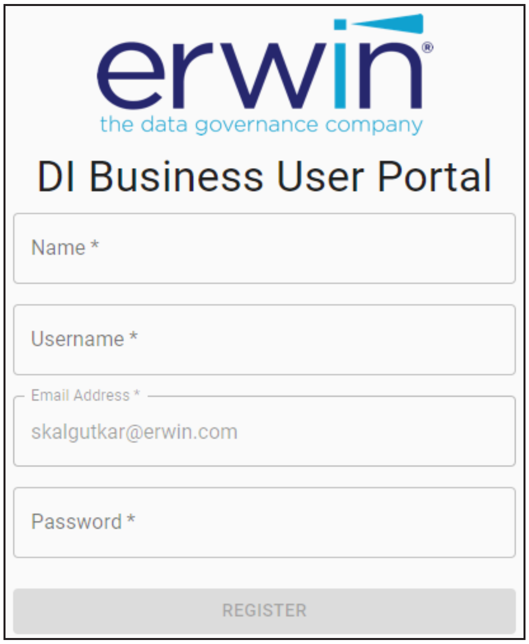
5. Enter an **Email Address** and click **Save**.

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



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

1. Click to open the registration form.



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.

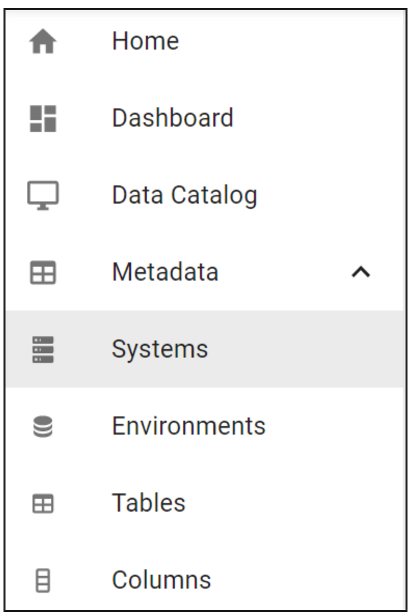
Systems

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:

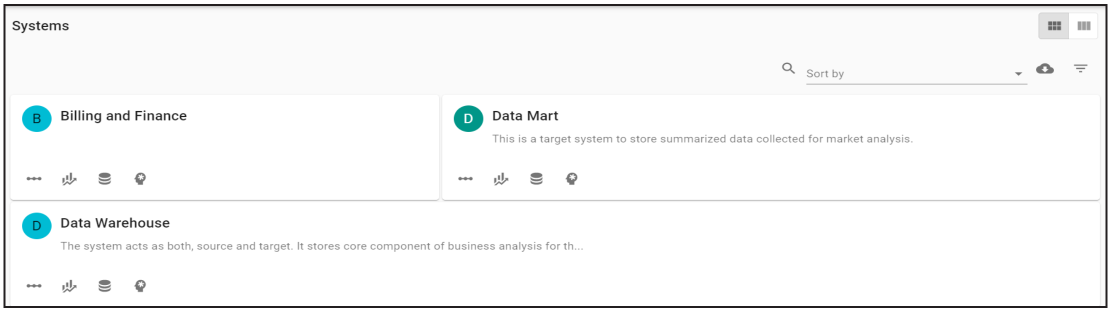
1. In the menu, expand the **Metadata** node.

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

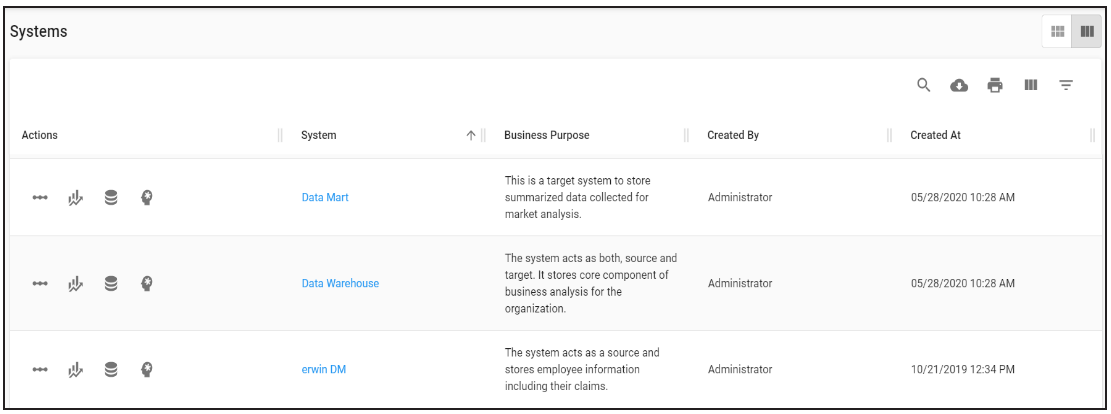
2. Click **Systems**.

   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.

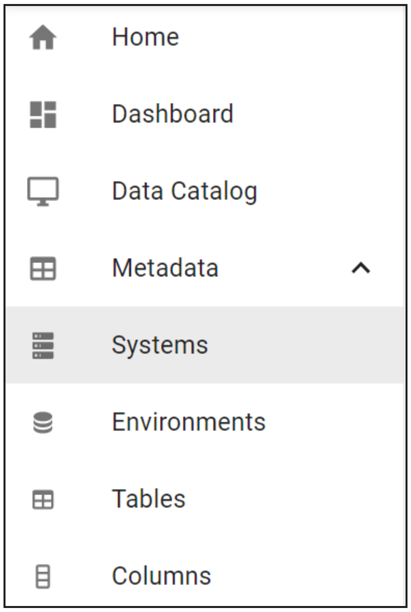
Environments

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:

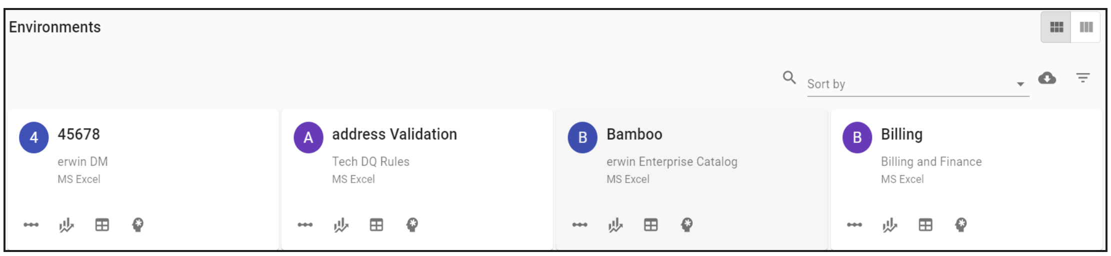
1. In the menu, expand the **Metadata** node.

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



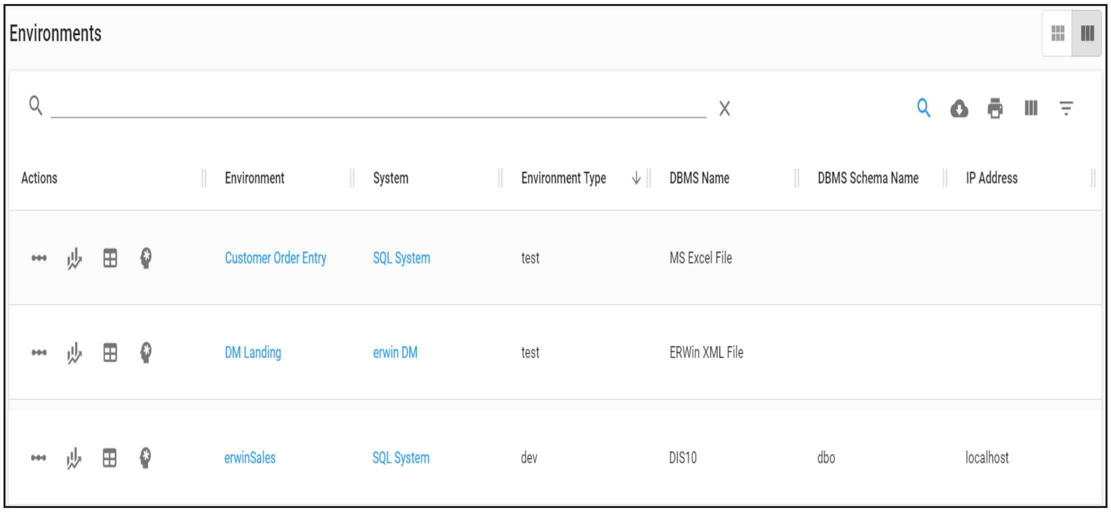
2. Click **Environments**.

   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.



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.

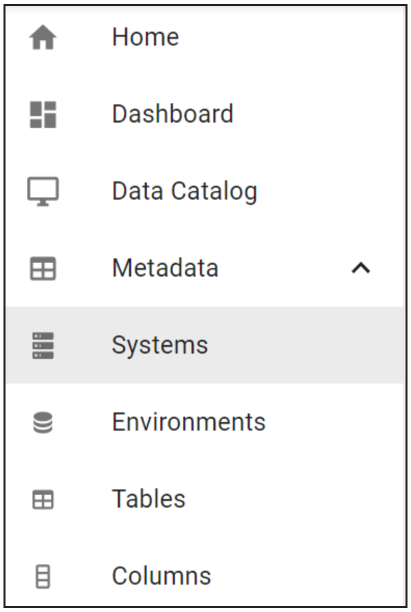
Tables

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:

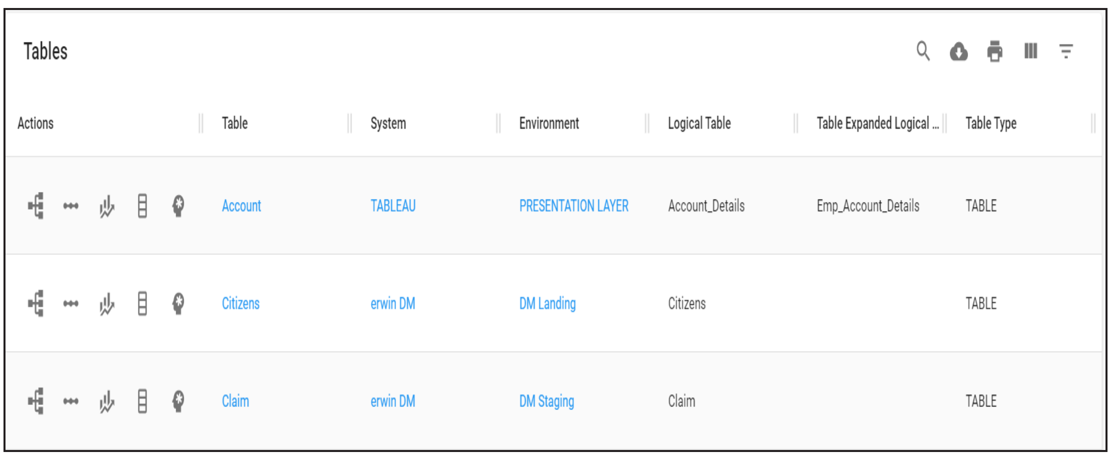
1. In the menu, expand the **Metadata** node.

   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.



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.

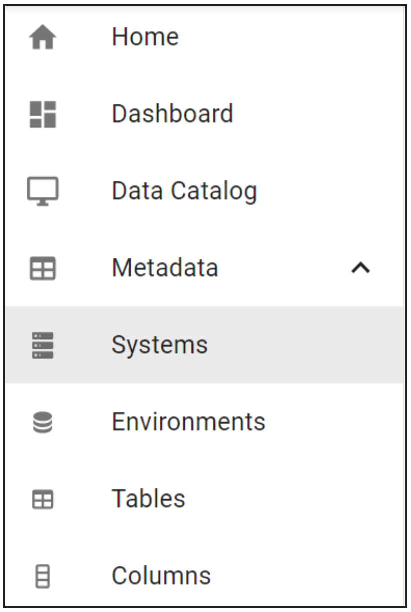
Columns

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:

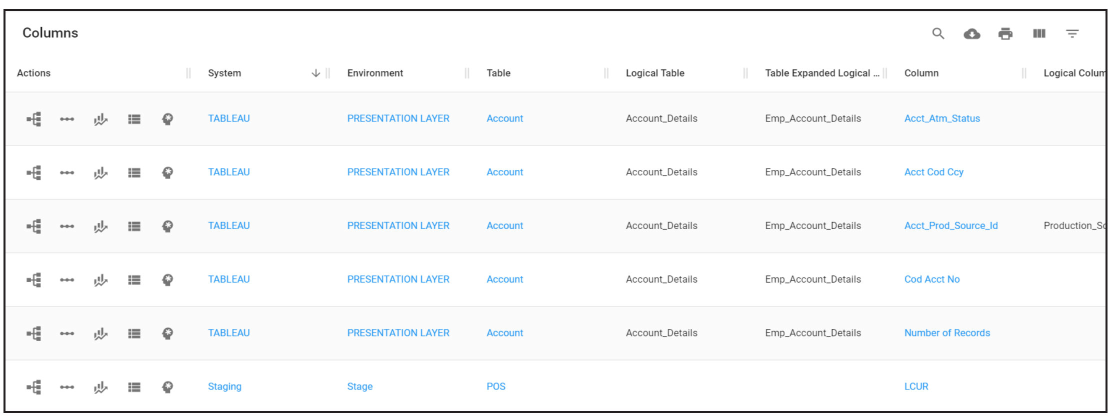
1. In the menu, expand the **Metadata** node.

   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.

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

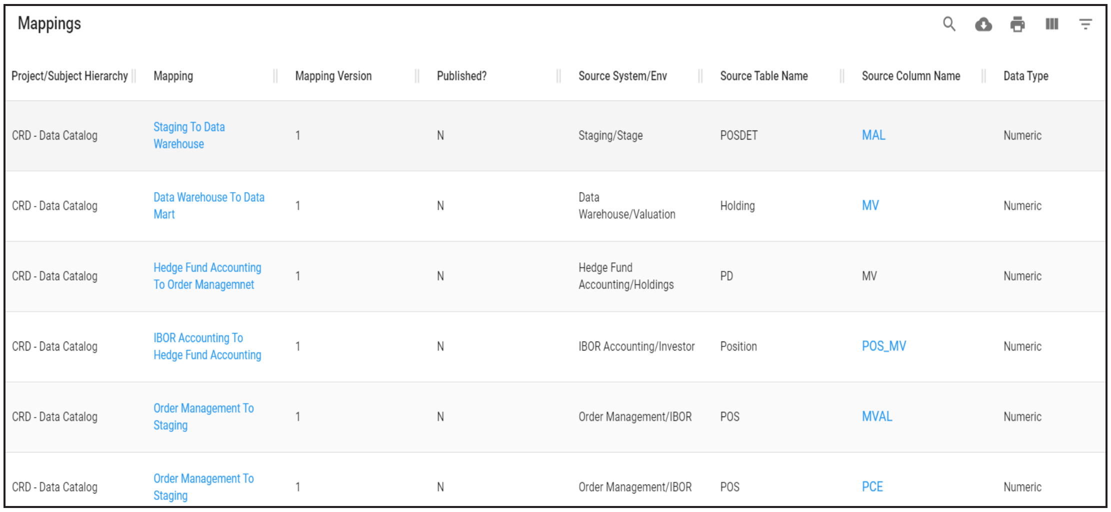
For more information on columns, its associations, mappings, lineage, and mind maps refer to the Columns section

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.


Mappings

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

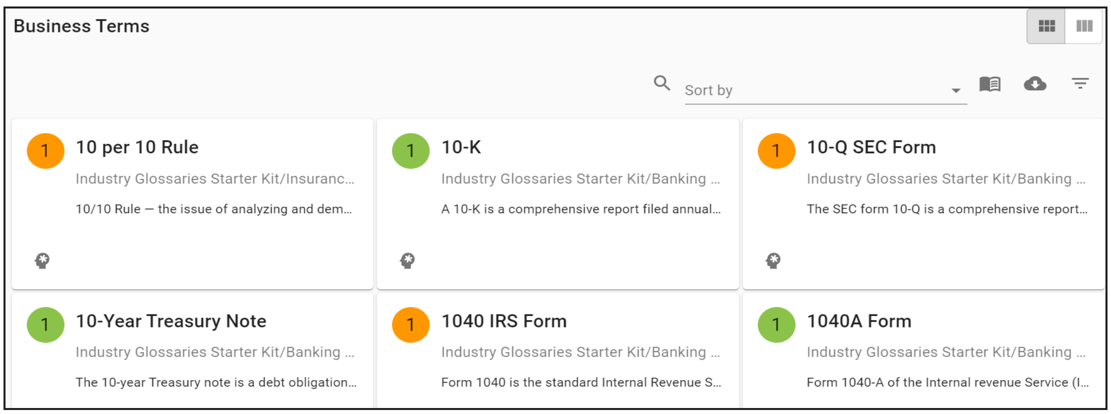
Business Terms

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:

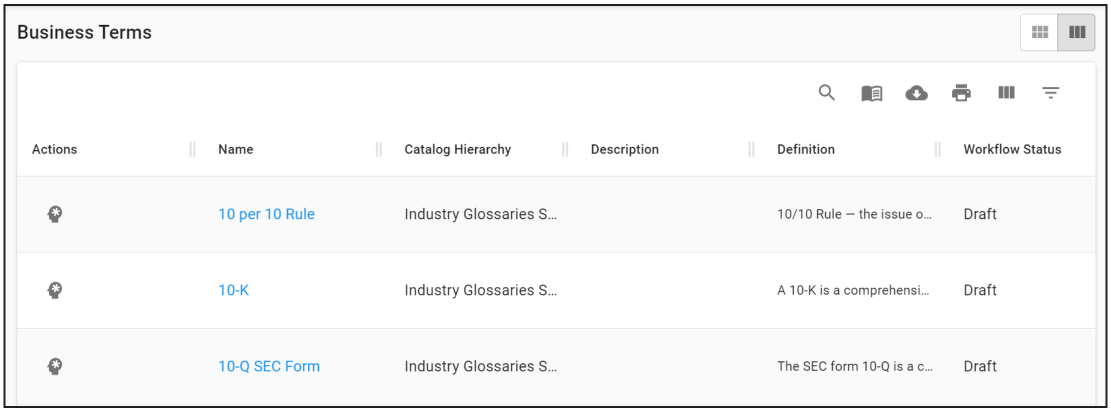
1. In the menu, click **Business Terms**.

   By default, the Business Terms card view appears.



2. Click .

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



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

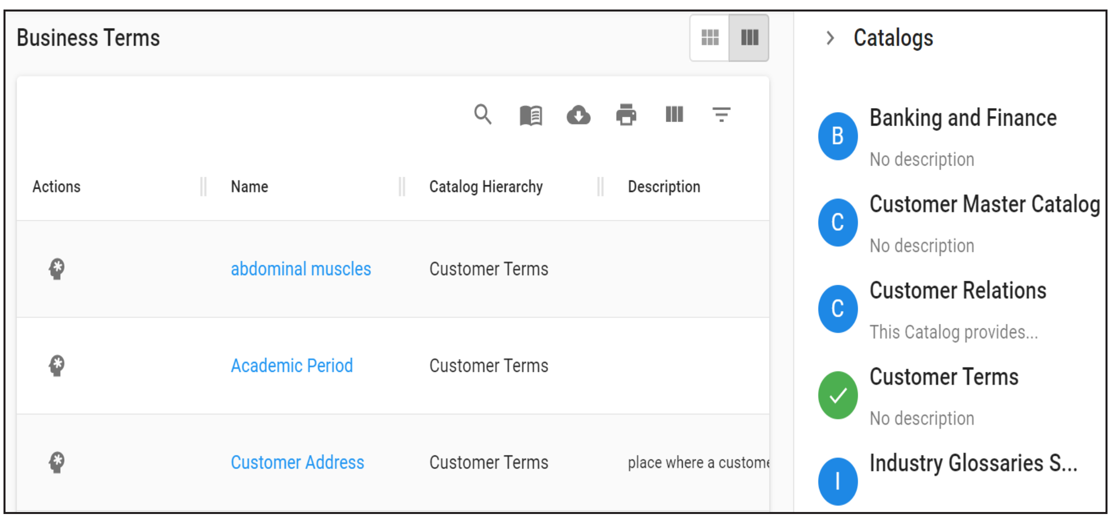
Search ( )

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.



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.

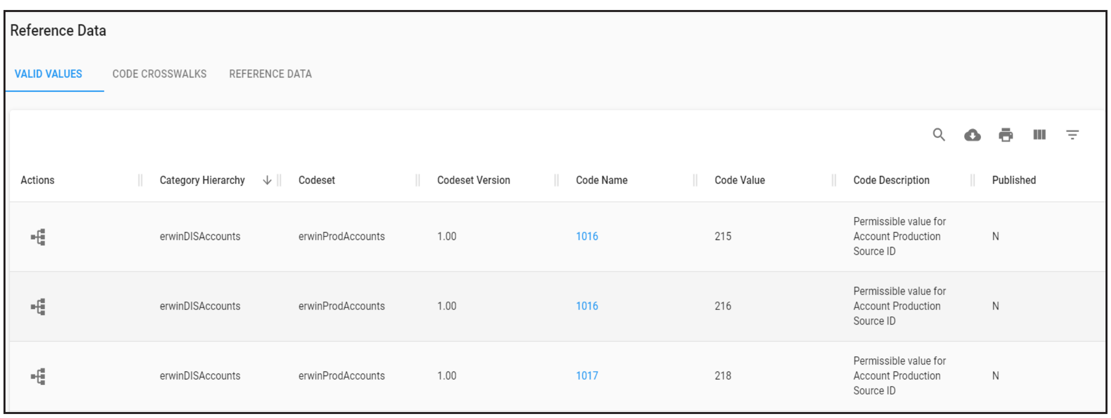
For more information on business terms and other business assets refer to the Data Literacy section.

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.



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

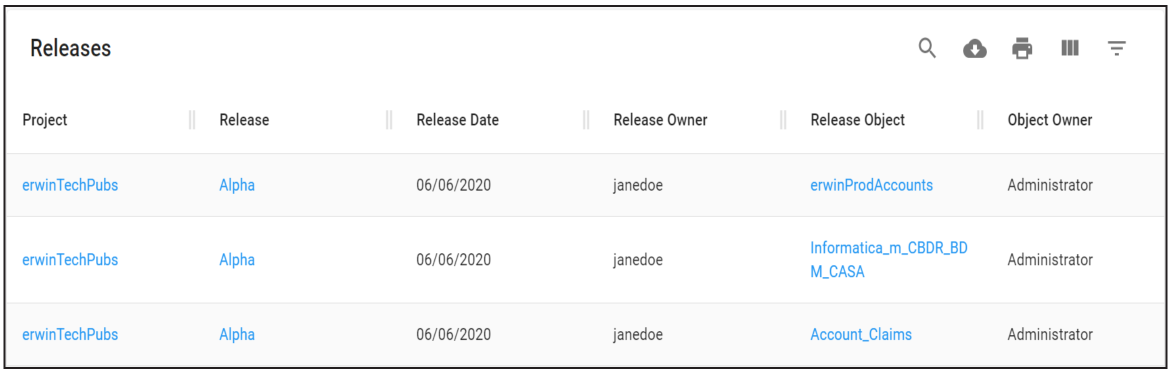
For more information on valid values, code crosswalks, and reference data refer to the Reference Data section.

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.



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.

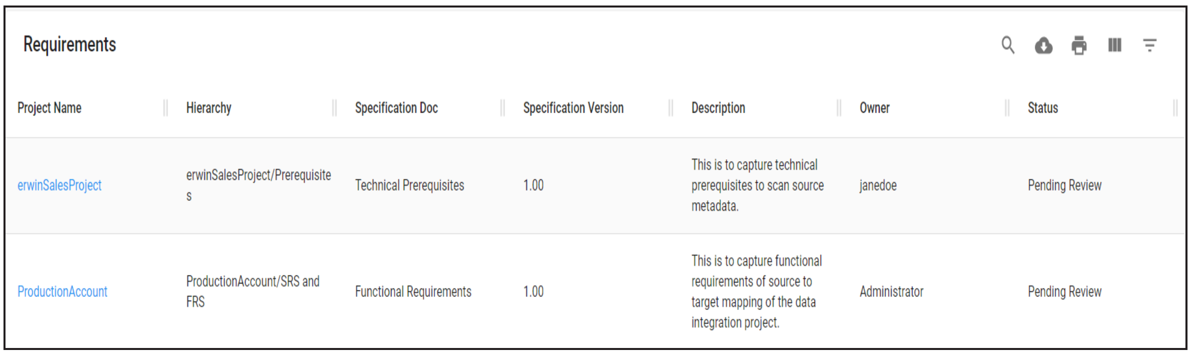
For more information on project details, release details, and release object details refer to the Releases topic.

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
erwinSalesProject	erwinSalesProject/Prerequisites	Technical Prerequisites	1.00	This is to capture technical prerequisites to scan source metadata.	janedoe	Pending Review
ProductionAccount	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 ( )

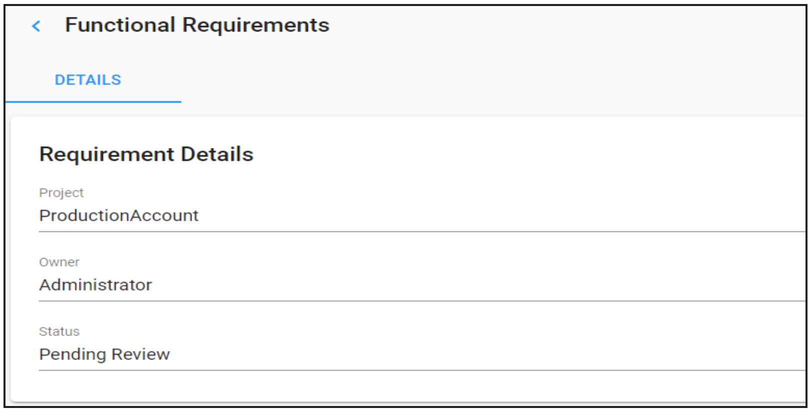
Use this option to select columns, which you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

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>.

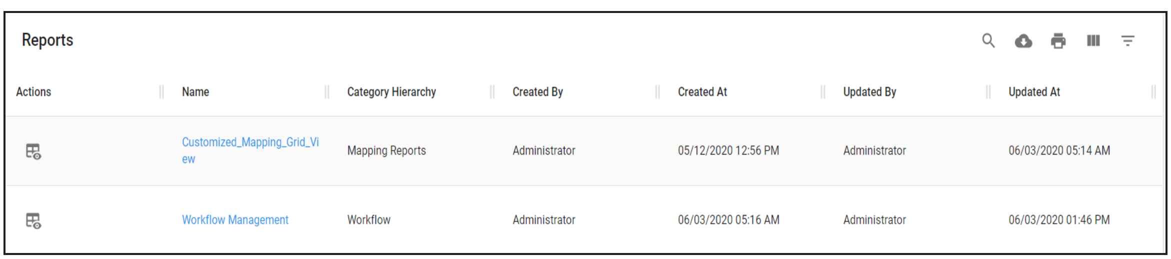


Reports

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.



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.