



## **erwin DI Business User Portal**

### **Data Literacy Guide**

**Release v10.2**

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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:

- 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

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# Contents

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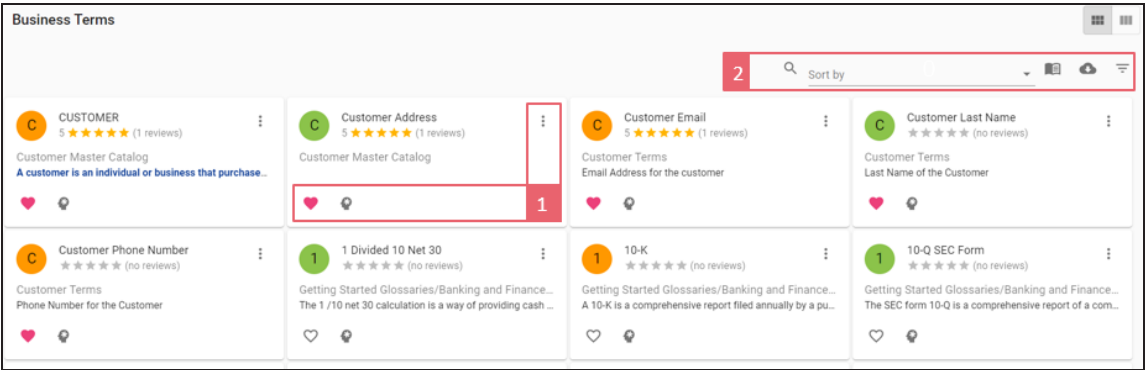
<b>Legal Notices</b> .....	<b>2</b>
<b>Contents</b> .....	<b>5</b>
<b>Business Glossary</b> .....	<b>6</b>
Business Terms .....	8
Business Term Details .....	9
Associations .....	10
Valid Values .....	11
Business Policies .....	12
Business Policy Details .....	13
Associations .....	14
Business Rules .....	15
Business Rule Details .....	16
Associations .....	17
Custom Assets .....	18
Custom Object Details .....	19
Associations .....	20
Mind Maps .....	21
Reviewing and Rating Assets .....	25
Managing Access .....	27
Assigning Roles .....	28
Assigning Users .....	29

# Business Glossary

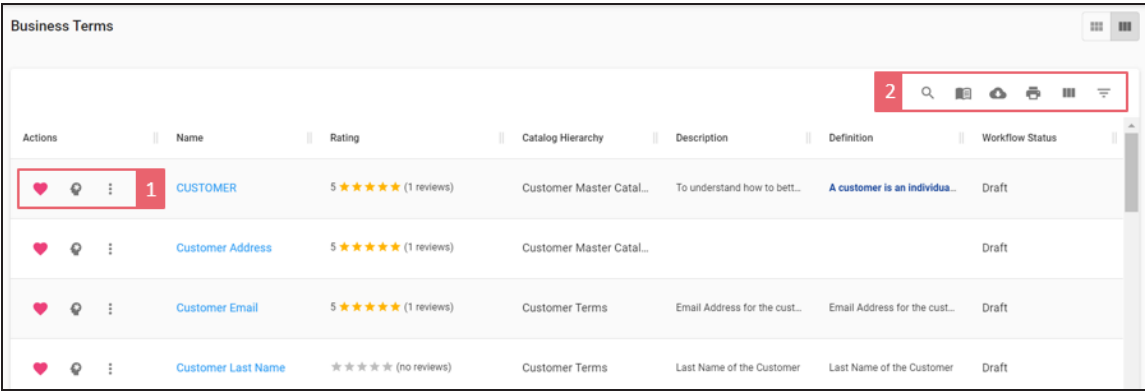
By default, erwin Data Intelligence Suite (DI Suite) has three types of business assets, business terms, business policies, and business rules. You can view these business assets in erwin DI Business User Portal (BUP) under Business Terms, Business Policies, and Business Rules. Asset types, defined in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

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









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




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



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

UI Section	Options	Description
Action Section		Use this option to mark an asset favorite. This helps in searching an asset using the global search.
		Use this option to <a href="#">view mind map</a> of an asset.
		Use this option to <a href="#">manage access to an asset</a> or add it to <a href="#">My To Do List</a> .
Filter and Export Options		Use this option to search the required assets.
	Sort by	Use this option to sort assets in alphabetical or reverse alphabetical order based on Catalog Hierarchy, Data Steward, Definition, Description, Name, and Workflow Status.  This option is available only in the card view.
		Use this option to filter a list of assets based on Catalogs.
		Use this option to download a list of assets in the XLSX format.
		Use this option to filter list of assets based on the available options.
		Use this option to print a list of assets. This option is

UI Section	Options	Description
		available only in the grid view.
		Use this option to select columns that you want to show in a grid. By default, all the columns are selected.

You can [rate and review](#) a business asset and analyze business glossary details by further drilling down the following business assets:

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

## Business Terms

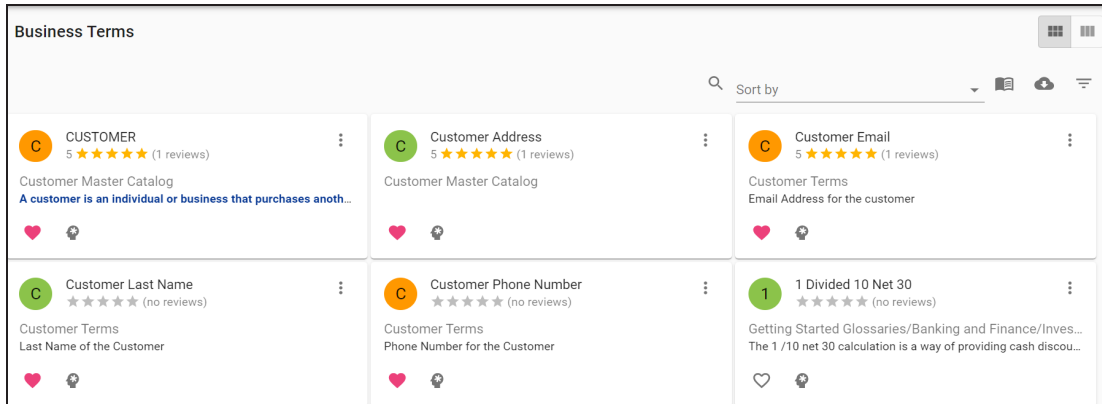
erwin DI Business User Portal (BUP) gives you access to view a business term's details, associations, valid values, and mind map. You can view a list of all the business terms and navigate through the list using advance filtering mechanisms to find the required business term. You can also analyze miscellaneous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


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

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

By default, the Business Terms card view appears.















You can enrich the asset by adding it to My To Do List. Click , and select the **Add to To-do** option to add an asset to My To Do List.

2. Click .

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

Business Terms							
Actions	Name	Rating	Catalog Hierarchy	Description	Definition	Work	
  	CUSTOMER	5 ★★★★★ (1 reviews)	Customer Master Cat...	To understand how to be...	A customer is an individ...	Draft	
  	Customer Address	5 ★★★★★ (1 reviews)	Customer Master Cat...			Draft	
  	Customer Email	5 ★★★★★ (1 reviews)	Customer Terms	Email Address for the cu...	Email Address for the cu...	Draft	

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

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

## Business Term Details

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

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

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

< CUSTOMER  
5 ★★★★★ (1 reviews)

DETAILS ASSOCIATIONS VALID VALUES

**Business Term Details**

Name  
CUSTOMER ☐ Acronym

Description  
To understand how to better meet the needs of its customers, some businesses closely monitor their customer relationships to identify ways to improve service and products

Definition  
**A customer is an individual or business that purchases another company's goods or services.** Customers are important because they drive revenues; without them, businesses have nothing to offer. Most public-facing businesses compete with other companies to attract customers, either by aggressively advertising their products or by lowering prices to expand their [customer bases](#)

**Classification Details**

Catalog  
Customer Master Catalog

☒ Sensitive Data Indicator (SDI)

Sensitive Data Classification  
PII

Sensitive Data Description  
Personally Identifiable Information

**User Defined Properties**

Custom User Defined 1 Custom User Defined 6

**Workflow Details**

Workflow Status  
Draft

## Associations

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

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

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

Actions	Name	Type	Catalog Hierarchy	Relationship
	CitizenID	Column		Represents
	Citizens	Table		Represents
	CURRENCY	Business Term	Customer Master Catalog	is Parent Of

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

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

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

Actions	Name	Type	Catalog Hierarchy	Relationship
	CitizenID	Column		Represents
	Citizens	Table		Represents
	CURRENCY	Business Term	Customer Master Cat...	is Parent Of

**Association**

**Association Details**

Source Name  
CUSTOMER

Source Type  
Business Term

Relationship Name  
Represents

Target Name  
CitizenID

Target Type  
Column

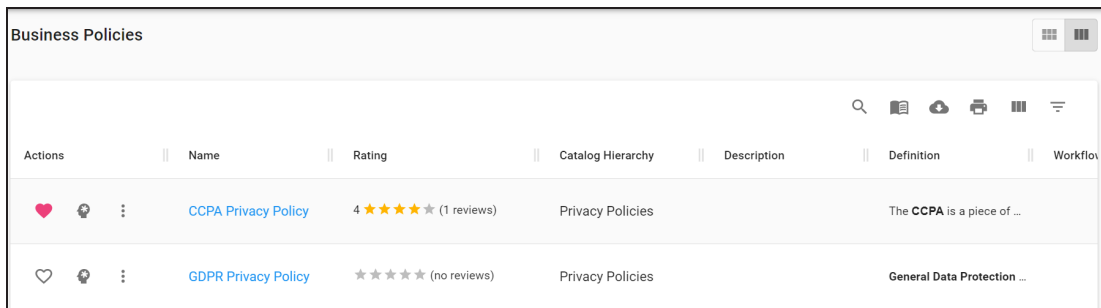
## Valid Values







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

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




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



Actions	Name	Rating	Catalog Hierarchy	Description	Definition	Workflow
  	<a href="#">CCPA Privacy Policy</a>	4 ★★★★★ (1 reviews)	Privacy Policies		The <b>CCPA</b> is a piece of ...	
  	<a href="#">GDPR Privacy Policy</a>	★ ★ ★ ★ ★ (no reviews)	Privacy Policies		General Data Protection ...	

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

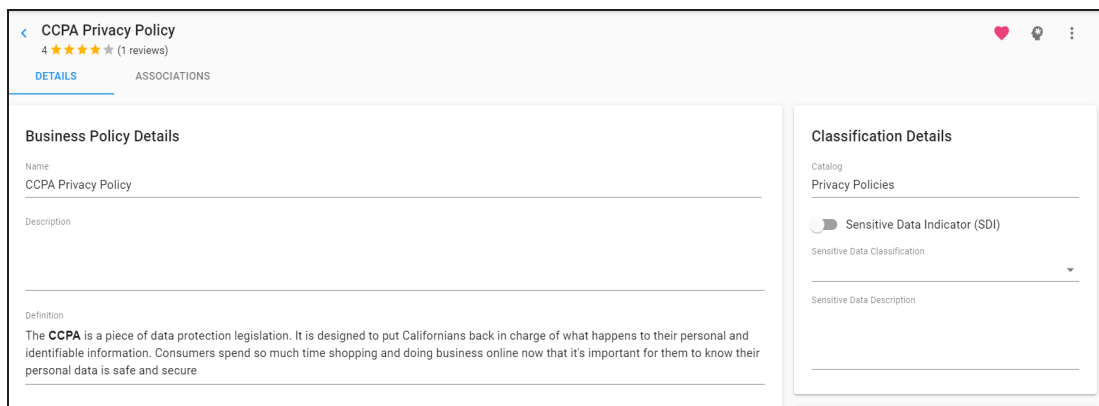
To view mind maps of business policies, click . For more information on mind maps, refer to the [Mind Maps](#) topic.


## Business Policy Details

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

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

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



 **CCPA Privacy Policy**

4 ★★★★★ (1 reviews)

DETAILS

ASSOCIATIONS

**Business Policy Details**

Name

CCPA Privacy Policy

Description

Definition

The **CCPA** is a piece of data protection legislation. It is designed to put Californians back in charge of what happens to their personal and identifiable information. Consumers spend so much time shopping and doing business online now that it's important for them to know their personal data is safe and secure

**Classification Details**

Catalog

Privacy Policies

☐ Sensitive Data Indicator (SDI)

Sensitive Data Classification

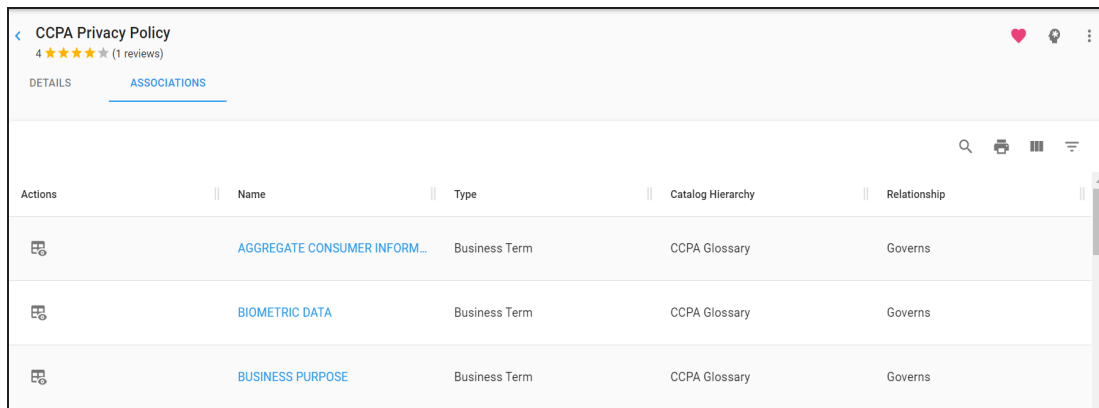
Sensitive Data Description

## Associations

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

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

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



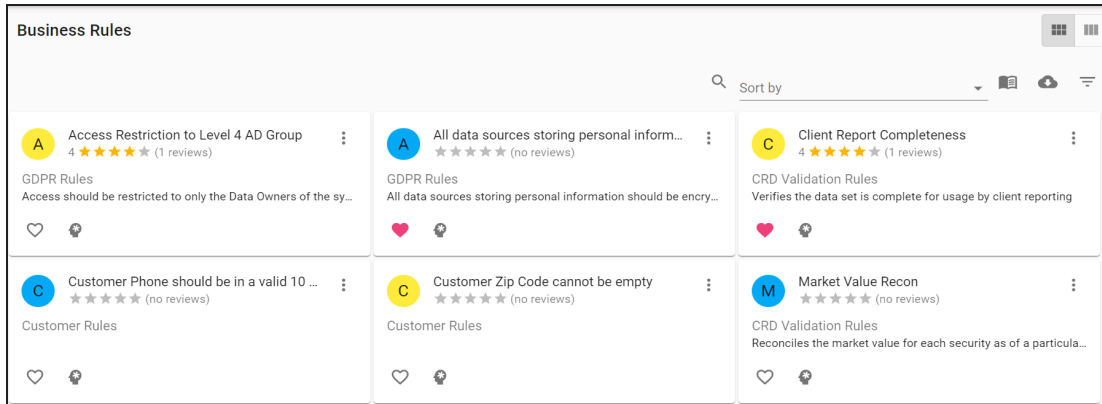
CCPA Privacy Policy 4 ★★★★★ (1 reviews)				
DETAILS ASSOCIATIONS				
Search, Print, Filter, Sort icons				
Actions	Name	Type	Catalog Hierarchy	Relationship
	<a href="#">AGGREGATE CONSUMER INFORM...</a>	Business Term	CCPA Glossary	Governs
	<a href="#">BIOMETRIC DATA</a>	Business Term	CCPA Glossary	Governs
	<a href="#">BUSINESS PURPOSE</a>	Business Term	CCPA Glossary	Governs


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

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

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















You can enrich the asset by adding it to My To Do List. Click , and select the **Add to To-do** option to add an asset to My To Do List.

2. Click .

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

Actions	Name	Rating	Catalog Hierarchy	Description	Definition	Work
  	<a href="#">Access Restriction to...</a>	4 ★★★★★ (1 reviews)	GDPR Rules		Access should be restric...	
  	<a href="#">All data sources stori...</a>	★★★★★ (no reviews)	GDPR Rules		All data sources storing ...	
  	<a href="#">Client Report Comple...</a>	4 ★★★★★ (1 reviews)	CRD Validation Rules		Verifies the data set is c...	

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

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

## Business Rule Details

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

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



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

<

Client Report Completeness...

4 ★★★★★ (1 reviews)

DETAILS

ASSOCIATIONS

Business Rule Details

Name

Client Report Completeness

Description

Definition

Verifies the data set is complete for usage by client reporting

Classification Details

Criticality

Catalog

CRD Validation Rules

☐ Sensitive Data Indicator (SDI)

Sensitive Data Classification

Sensitive Data Description

## Associations

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

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

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

<

Client Report Completeness...

4 ★★★★★ (1 reviews)

DETAILS

ASSOCIATIONS

Q

Print

Columns

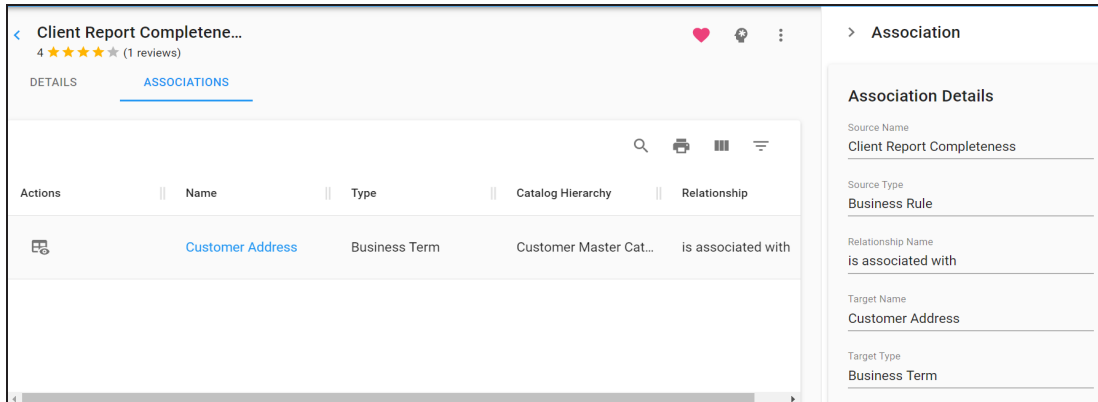
Filter

Actions	Name	Type	Catalog Hierarchy	Relationship
	<a href="#">Customer Address</a>	Business Term	Customer Master Catalog	is associated with

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

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

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



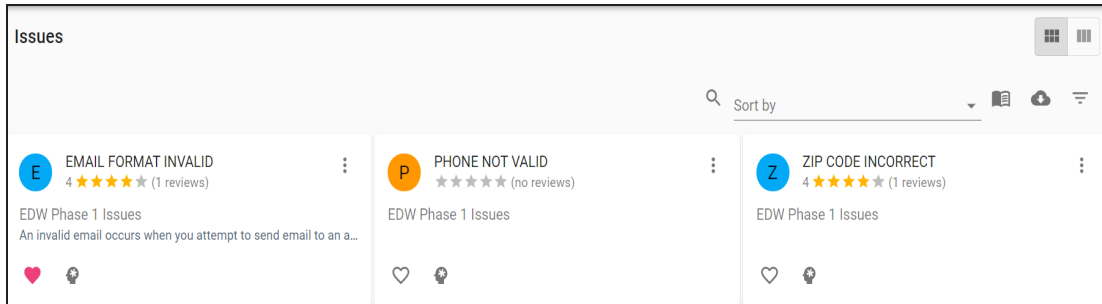
## Custom Assets


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

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

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

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












You can enrich the asset by adding it to My To Do List. Click , and select the **Add to To-do** option to add an asset to My To Do List.


3. Click .

The <Asset\_Type\_Name> grid appears.

The screenshot shows the 'Issues' section in grid view. The grid has columns for Actions, Name, Rating, Description, Catalog Name, Catalog Hierarchy, and Workflow. The data rows are the same as in the previous screenshot.

Actions	Name	Rating	Description	Catalog Name	Catalog Hierarchy	Workflow
  	EMAIL FORMAT INVA...	4 ★★★★★ (1 reviews)	Examples include addre...	EDW Phase 1 Issues	EDW Phase 1 Issues	
  	PHONE NOT VALID	★ ★ ★ ★ ★ (no reviews)	Phone Number doesn't ...	EDW Phase 1 Issues	EDW Phase 1 Issues	
  	ZIP CODE INCORRECT	4 ★★★★★ (1 reviews)	Zip Code doesn't match ...	EDW Phase 1 Issues	EDW Phase 1 Issues	

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

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

## Custom Object Details

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

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

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

**EMAIL FORMAT INVALID**  
4 ★★★★★ (1 reviews)

**DETAILS** ASSOCIATIONS

**Custom Object Details**

Name  
EMAIL FORMAT INVALID

Description  
Examples include addresses without the @ sign or addresses that include certain special characters and/or spaces. This response can come from our own server or the recipient mail server.

Definition  
An invalid email occurs when you attempt to send email to an address that is formatted in a manner that does not meet internet email format standards or the email does not exist at the recipient's mail server.

**Classification Details**

Catalog  
EDW Phase 1 Issues

☐ Sensitive Data Indicator (SDI)

Sensitive Data Classification

Sensitive Data Description

## Associations

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

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

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

**EMAIL FORMAT INVALID**  
4 ★★★★★ (1 reviews)

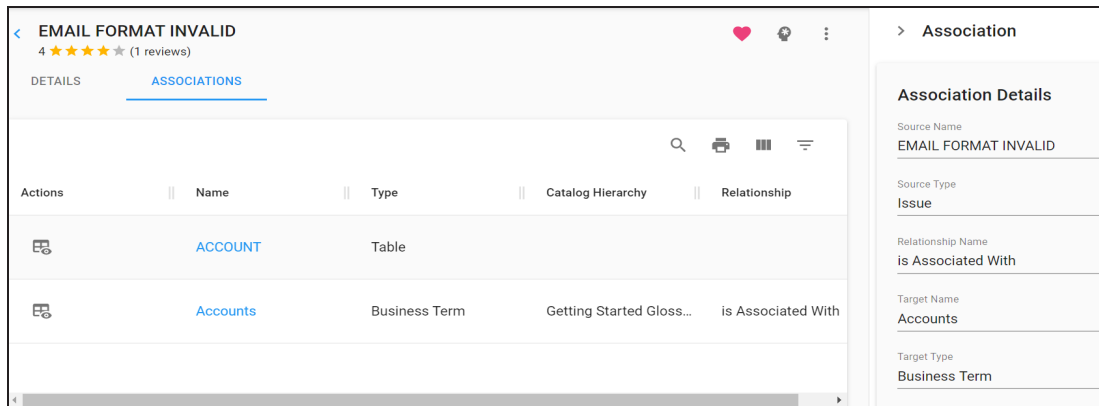
DETAILS **ASSOCIATIONS**



Actions	Name	Type	Catalog Hierarchy	Relationship
	<a href="#">ACCOUNT</a>	Table		
	<a href="#">Accounts</a>	Business Term	Getting Started Glossaries/Ba...	is Associated With

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

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

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




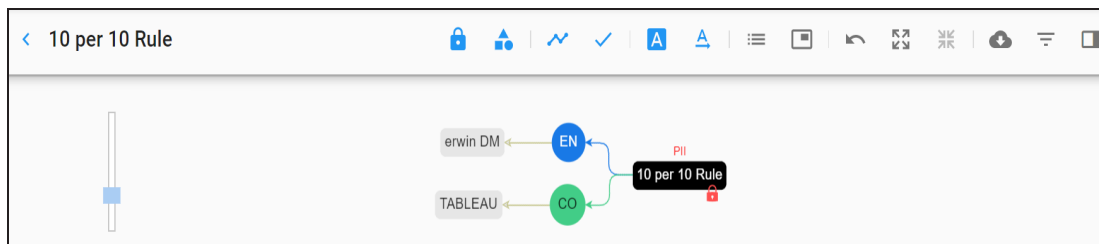
Actions	Name	Type	Catalog Hierarchy	Relationship
	ACCOUNT	Table		
	Accounts	Business Term	Getting Started Gloss...	is Associated With

**Association Details**  
Source Name  
EMAIL FORMAT INVALID  
Source Type  
Issue  
Relationship Name  
is Associated With  
Target Name  
Accounts  
Target Type  
Business Term

## Mind Maps


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


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

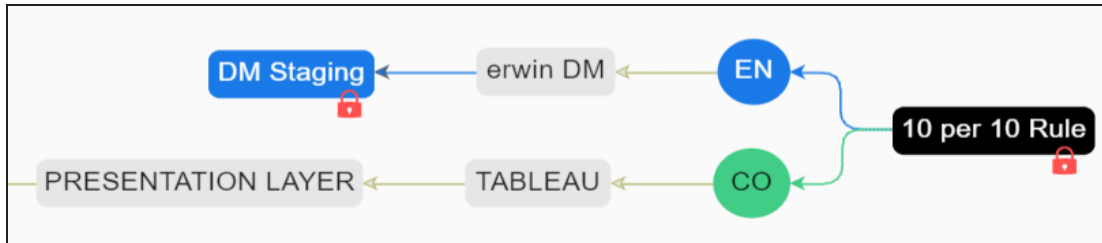


Use the following options to work on the mind map


**View Sensitivity Data Indicator** ()

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

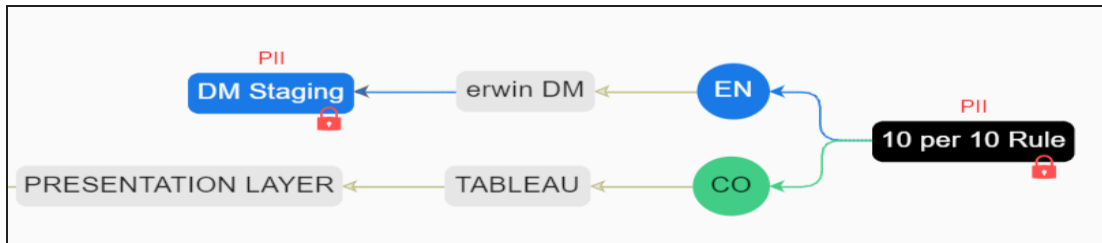
For example, the following mind map displays the sensitivity data indicator as sensitive () for the 10 per 10 Rule business term.




### View Sensitivity Data Classification ()

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

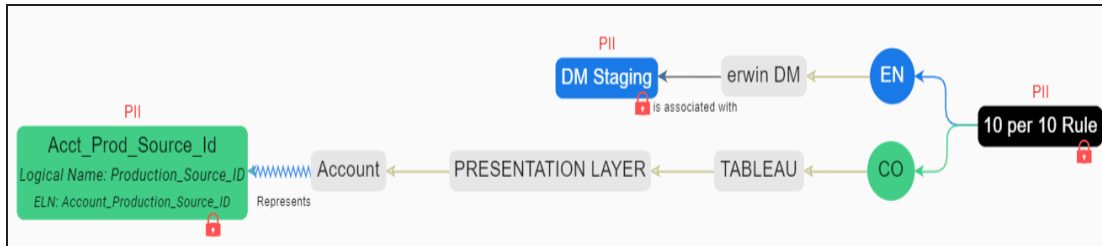
For example, the following mind map displays sensitivity data classifications of assets as PII (Personally Identifiable Information).



### Switch to Enterprise Relationship Configuration ()

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

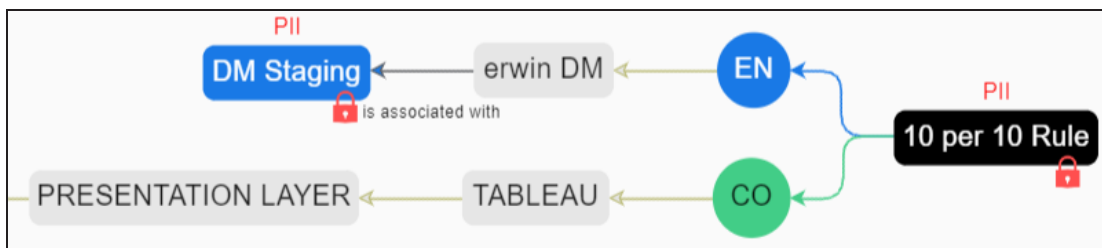
For example, the following mind map displays the relationship between business term and column in blue color and Zig Zag type display.



## Include Relationships (✓)

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

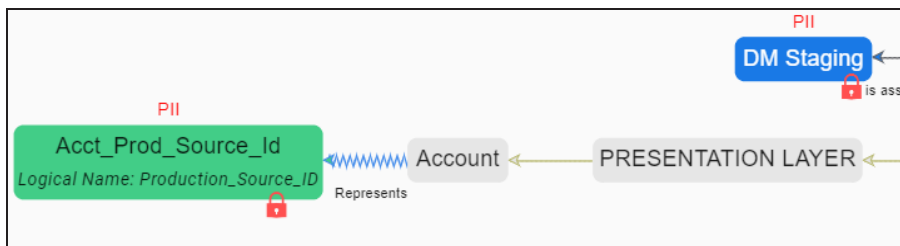
For example, the following mind map displays the relationships between an environment and business term (is associated with).



## Logical Names (A)

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

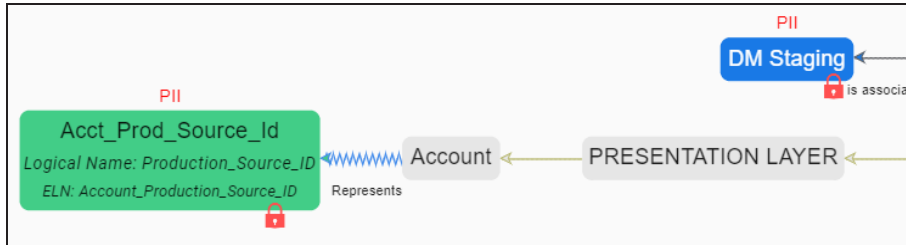
For example, the following mind map displays a column's logical name.



## Expanded Object Logical Names (A)

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

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

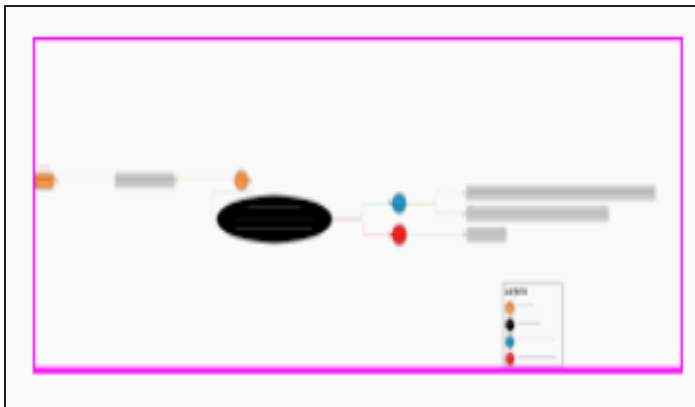


### Legend (☰)

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

### Overview (□)

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



### Expand All (⌕)

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

### Collapse All (⌕)

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

### Export (⬇️)

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

### Filter (☰)



Use this option to filter the mind map based on:

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

## Properties

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

## Reviewing and Rating Assets

You can review and rate business assets and custom assets under the Business Glossary module. Rating and reviewing an asset allows you to add 5-star rating and provide feedback for an asset. Also, the ratings are displayed for the asset in card view and grid view.

To review and rate an asset, follow these steps:

1. In the <Business\_Asset> grid, click an asset.

The <Business\_Asset\_Name> page appears.

< Customer Last Name  
★★★★★ (no reviews)

DETAILS ASSOCIATIONS VALID VALUES

**Business Term Details**

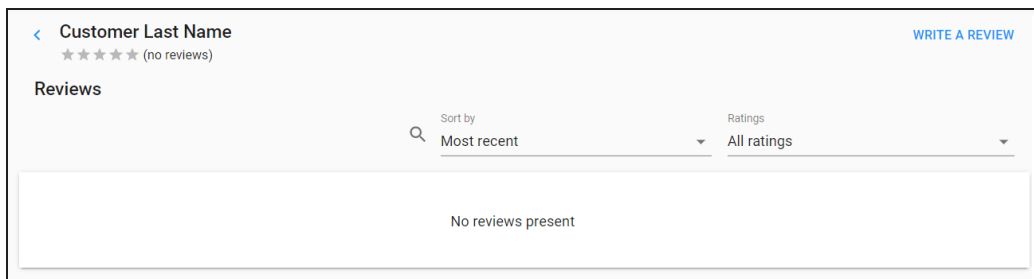
Name  
Customer Last Name

Description  
Last Name of the Customer

2. Click ★★★★★.

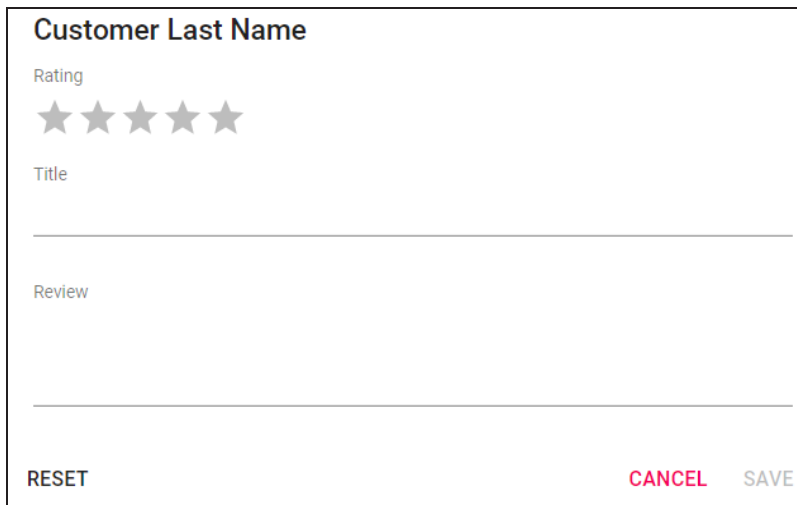
The Reviews page appears. It also, displays reviews and ratings for the asset from all

the users.



3. Click the **Write A Review** option.

The ratings page appears.




4. Enter appropriate values in the fields. Refer to the following table for field descriptions.

Filed Name	Description
Rating	Specifies the rating of the asset. To rate an asset, select an appropriate star.
Title	Specifies the title of your review comments. For example: Well Documented Asset!

Filed Name	Description
Review	Specifies the review comments.  For example: The asset's technical and business properties are well documented.

5. Click **Save**.

The ratings are displayed on the Reviews page.

Once the review is added, you can click  to use the following options:

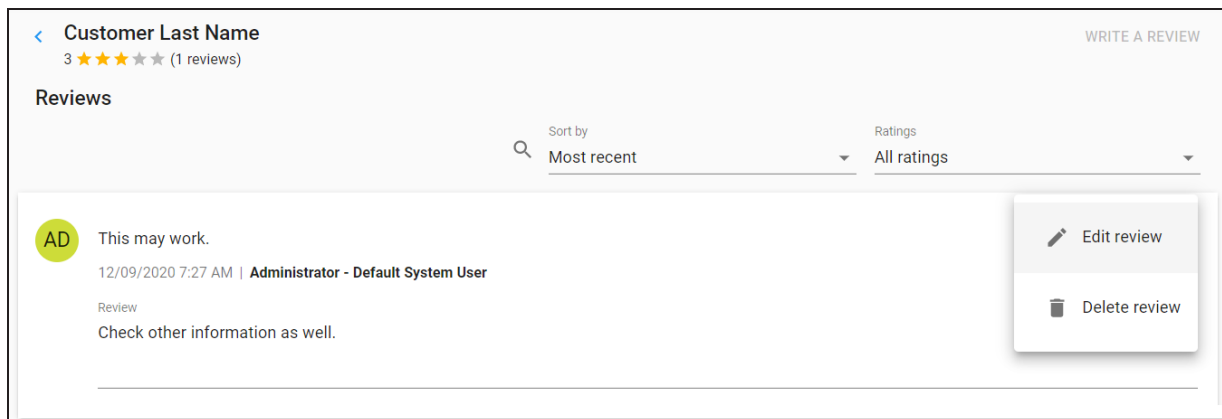
- **Edit Review:**

Use this option to update reviews and ratings for the asset.

- **Delete Review:**

Use this option to delete the review.

You can also filter the reviews based on ratings and sort category.



## Managing Access

You can manage access to business assets in the following ways:

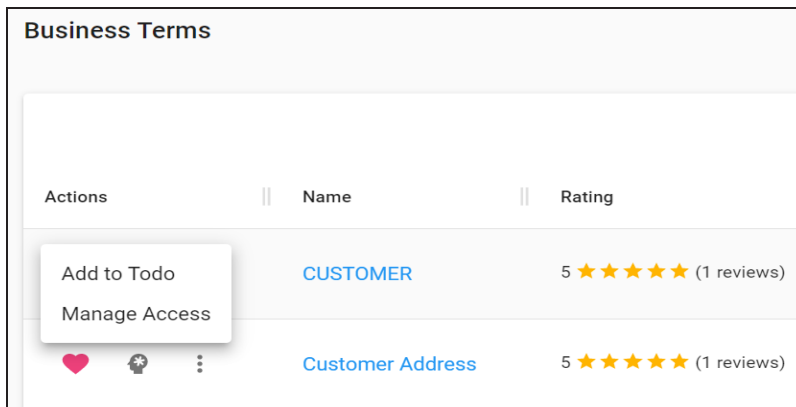
- Assigning roles
- Assigning users

## Assigning Roles

To manage access via roles, follow these steps:

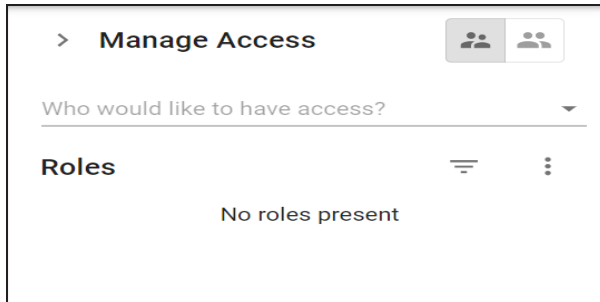
1. In the <Business\_Asset> grid, click .

The available options appear.



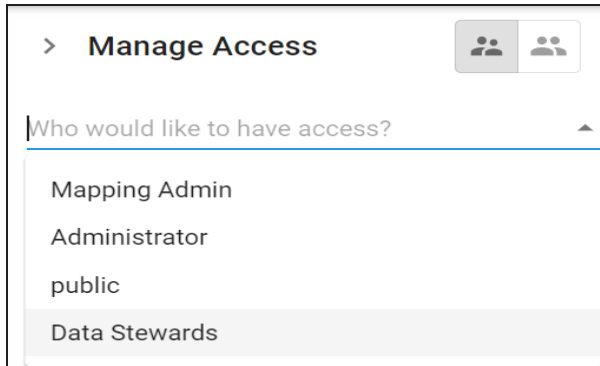
2. Click **Manage Access**.

The Manage Access pane appears. By default, it is switched to Roles (



3. Click .


The available roles appear.



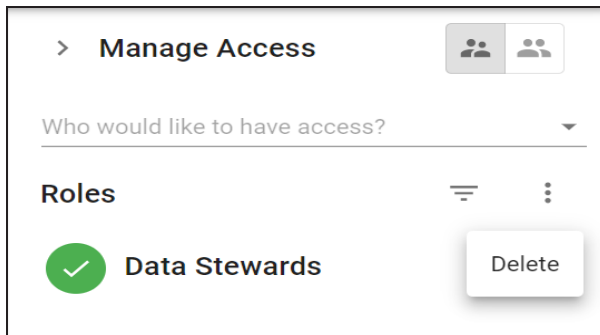
4. Select a role.

The selected role is assigned to the asset. Also, the users assigned to this role get access to the asset.

To delete roles from the assigned roles list, follow these steps:

1. Select a role.
2. Click  for the selected role.

The Delete option appears.




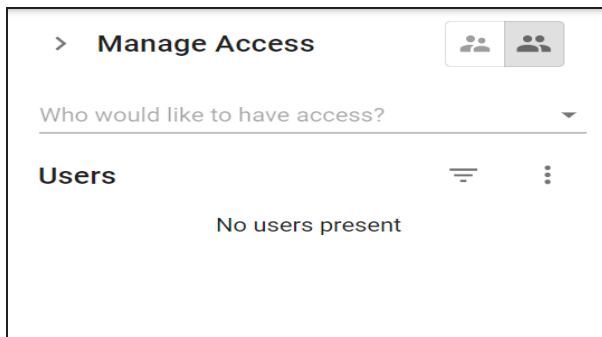
3. Click **Delete**.

The selected role is deleted.

## Assigning Users

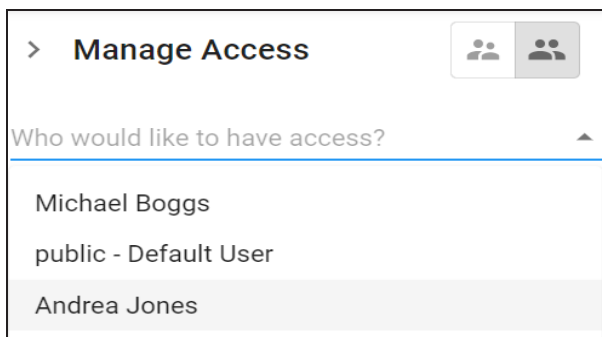
To manage access via users, follow these steps:

1. In the **Manage Access** pane, switch to **Users** ().



2. Click .


The available users appear.



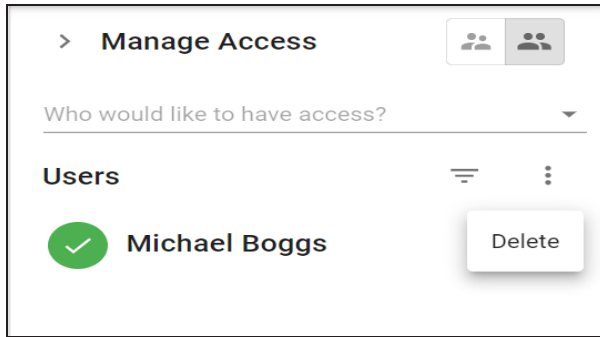
3. Select a user.

The selected user is assigned to the asset.

To delete users from the assigned users list, follow these steps:

1. Select a user.
2. Click  for the selected user.

The Delete option appears.



3. Click **Delete**.

The selected user is deleted.