



erwin DI Business User Portal

User Guide

Release v10.2

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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

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erwin Data Modeler News and Events

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

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Introduction

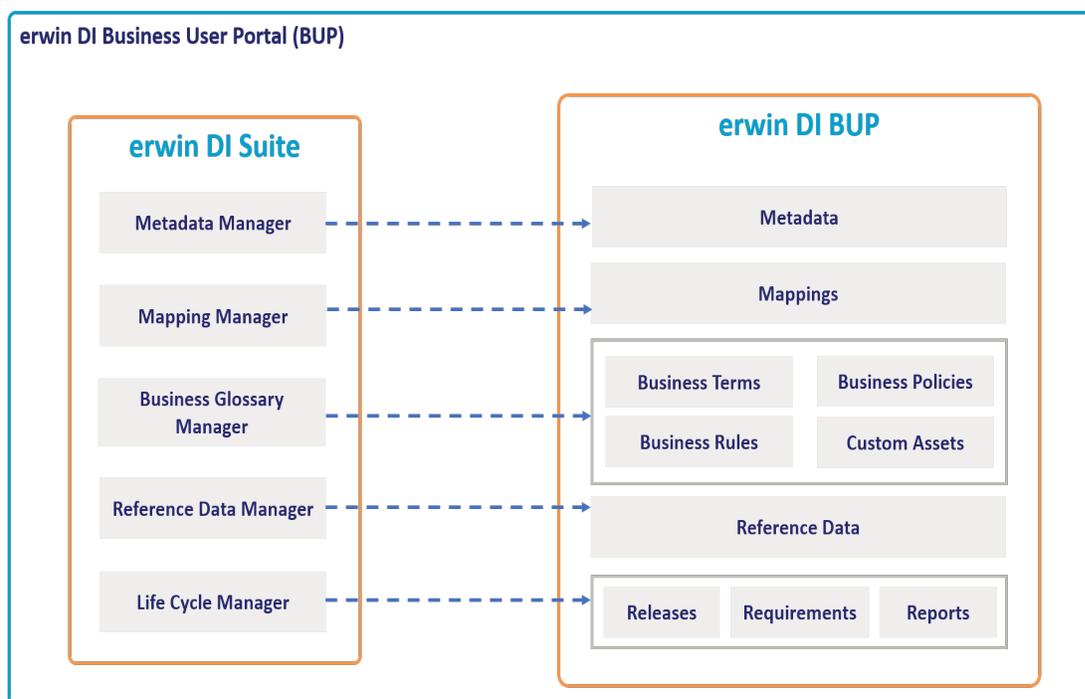
erwin DI Business User Portal (BUP) is a self-service, read-only portal targeted at business users. It provides you with an easy way to access data governance and management information stored in erwin Data Intelligence Suite (DI Suite). It has flexible search and filter mechanisms, which make analysis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

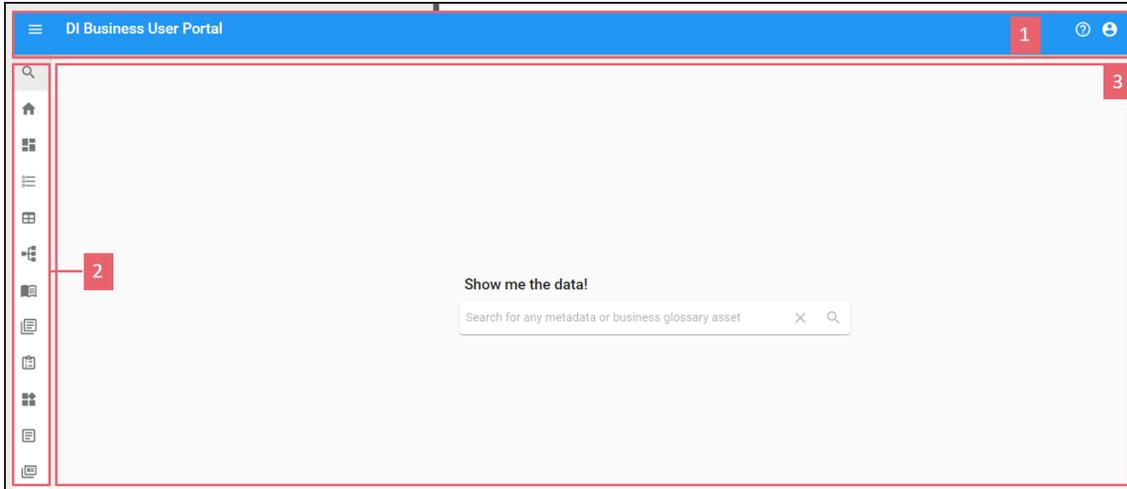
User Interface

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 [Search](#) page appears.



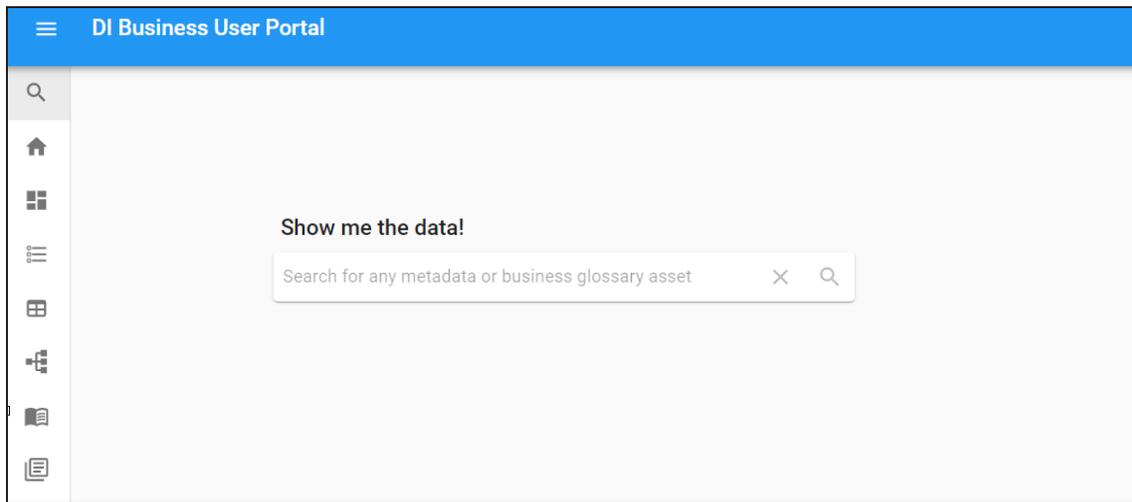
| UI Section | Icon | Function |
|-------------|---|--|
| 1-Top Pane |  | Application Menu: Click this icon to expand the menu and access modules. |
| |  | Click this icon to use the following options: <ul style="list-style-type: none"> ▪ Help: Access online help ▪ Feedback: Access erwin User Community ▪ About: View product and license information. You can also update and activate your license here. |
| |  | Click this icon to use the following options: <ul style="list-style-type: none"> ▪ Account: View user accounts and change the password ▪ Administration: Manage users and roles ▪ Logout: Log out |
| 2-Menu | | Use this pane to access modules. |
| 3-Work Area | | Use the search option to search across all the technical assets and business assets. |

Search

The contextual global search feature enables you to search across all the technical and business assets quickly and easily. The search results are displayed based on the search string.

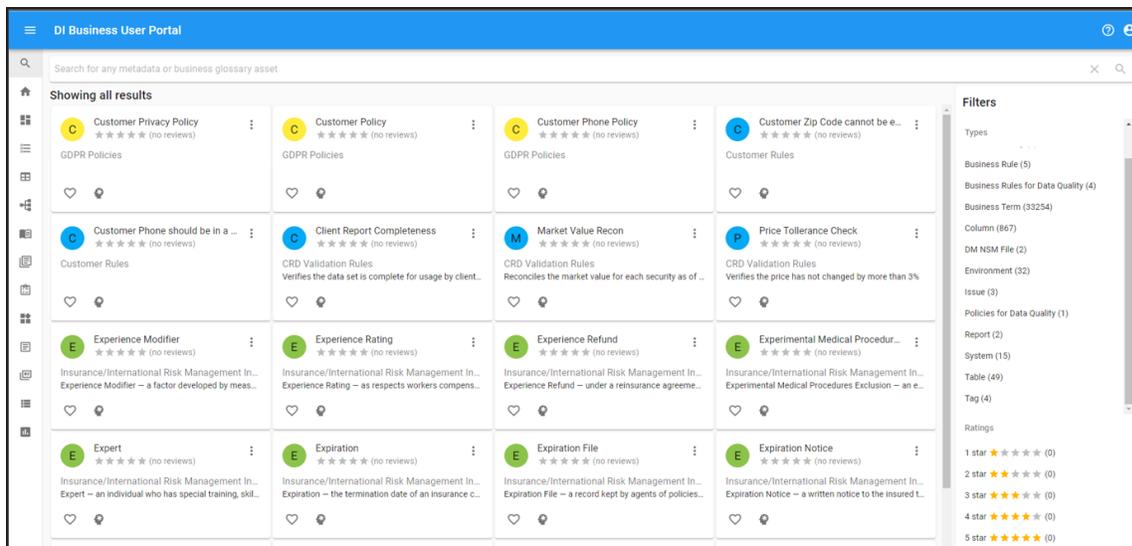
To access search, on the menu, click .

The Search page appears.



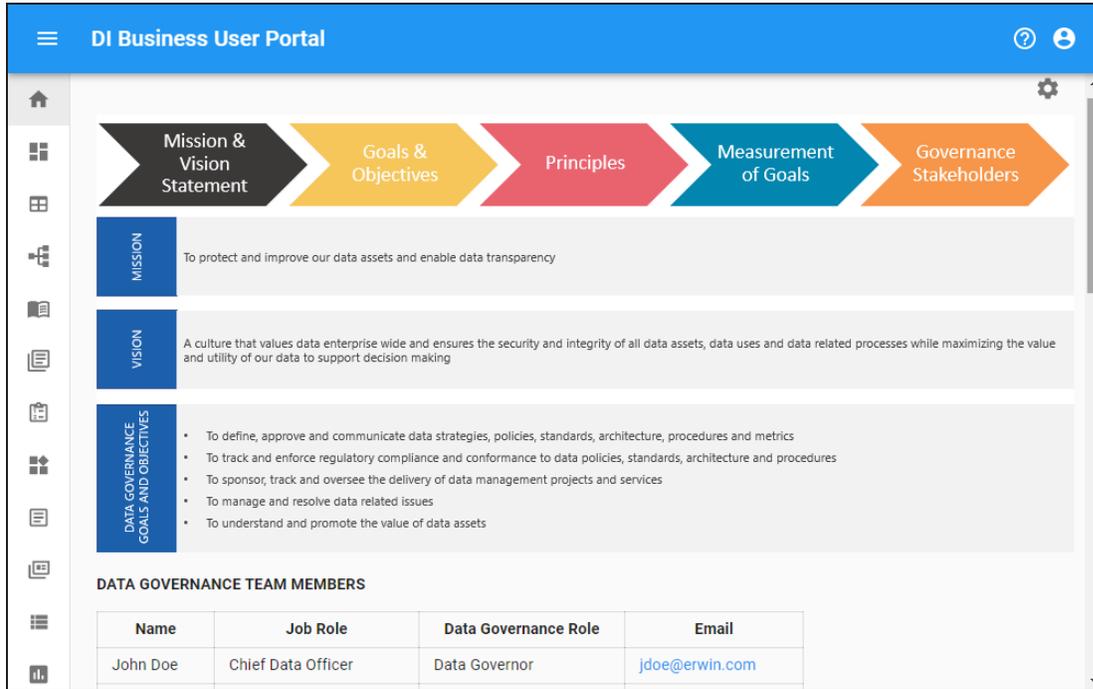
Enter a search string in the **Show me the data!** box and then, click  or press Enter. The search results display all the assets containing the search string.

From the search results page, you can also use the **Filters** section to view assets based on asset type and ratings.



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 .

Home 

This page provides the ability to edit the content which is seen on the landing page. The syntax for editing the content of the page is markdown. For more information about markdown, see [Markdown Guide](#).

WRITE PREVIEW

T **B** *I*       

```

## 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
    
```


[\[Click Here\]\(www.erwin.com\) 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 .

| History | | | | | | |    |
|--------------------------|---|---------|-------------------------------------|---------------------|-------------------------------------|---------------------|---|
| <input type="checkbox"/> | Actions | Version | Created By | Created At | Updated By | Updated At | |
| <input type="checkbox"/> |    | 3 | Administrator - Default System User | 05/28/2020 07:04 AM | Administrator - Default System User | 05/28/2020 07:04 AM | |
| <input type="checkbox"/> |    | 2 | Administrator - Default System User | 05/28/2020 06:42 AM | Administrator - Default System User | 05/28/2020 06:42 AM | |
| <input type="checkbox"/> |    | 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.

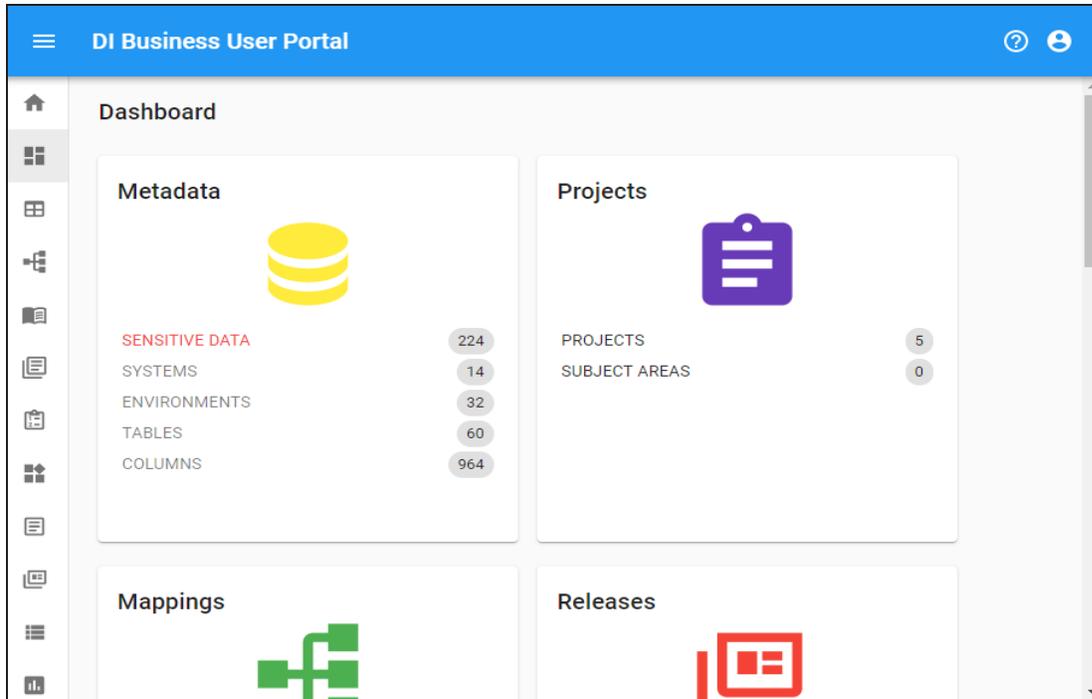
Delete ()

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

Dashboard

The dashboard displays modules of erwin Data Intelligence Suite (DI Suite). It displays this information in the card format.

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.

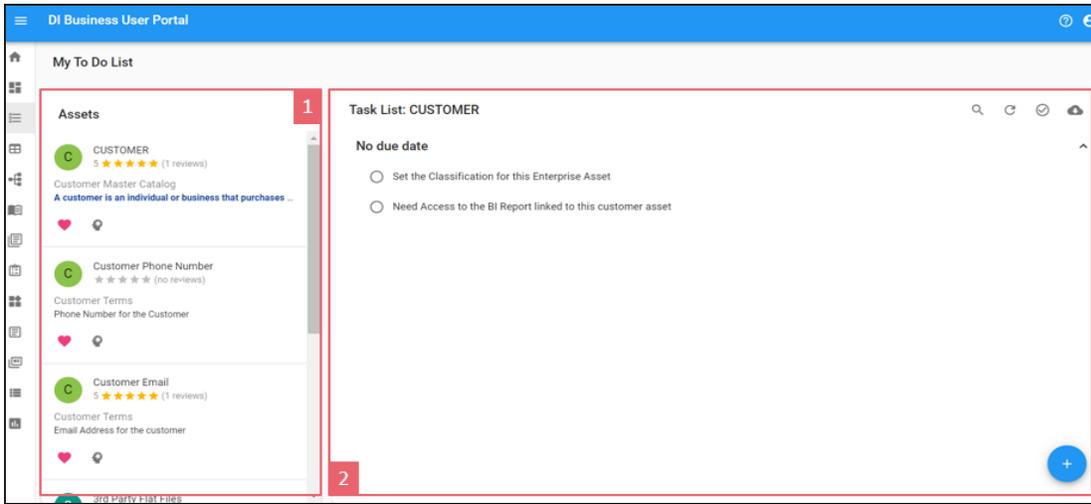
For more information on accessing reports, refer to the [Reports](#) topic.

My To Do List

You can add technical and business assets to My To Do List. After adding assets to My To Do List, you can create tasks for an asset and assign these tasks to users. You can also set reminders, update, and delete tasks as required.

To access My To Do List, on the menu, click .

The My To Do List page appears.



Refer to the following table for UI sections and their functions.

| UI Section | Function |
|------------------|---|
| 1-Assets Pane | Use this pane to browse through assets in your My To Do List. This pane displays business and technical assets that are added to the My To Do List. |
| 2-Task List Pane | Use this pane to create and manage tasks for an asset. |

You can add an asset to the My To Do List directory while you are browsing through any [technical](#) or [business](#) assets.

Creating Tasks

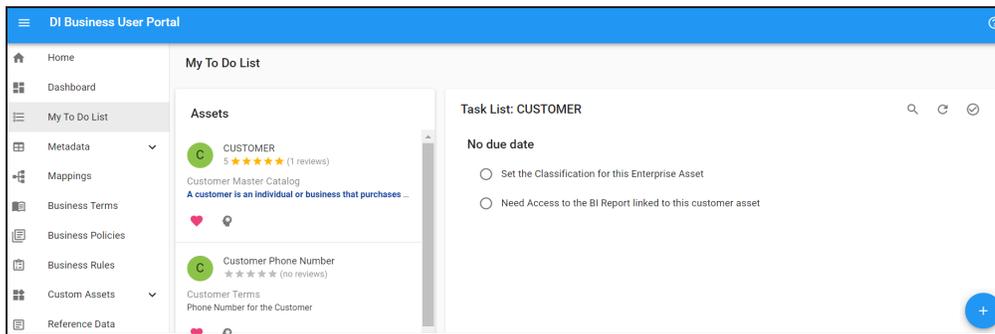
You can create a list of tasks for assets added to the My To Do List. You can assign users and set a due date for these tasks..

To create tasks, follow these steps:

1. Go to **Application Menu > My To Do List**.
The My To Do List page appears.
2. On the Assets pane, click an asset.
The Task List Pane displays the tasks for the selected asset.



The Task List pane will be empty if there are no existing tasks for an asset.



3. Click  .

The Create Task page appears.

Create Task

Name*
Add task name

Description
Add description

High Importance

Due date 📅

Assign Users

User type Select users

Business Users Select users

Selected Users ☰

[CANCEL](#) [SUBMIT](#)

4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

| Filed Name | Description |
|-----------------|--|
| Name | Specifies the name of the task. For example, Set Sensitive Classification. |
| Description | Specifies the description of the task. For example: Mark this asset as sensitive and classify as PII. |
| High Importance | Specifies whether the task is of high importance. To indicate that the task is of high importance, switch High Importance to ON . |
| Due Date | Specifies the due date of the task. |
| User Type | Specifies the user type assigned to the task. |

| Filed Name | Description |
|-----------------------|---|
| | <p>You can select a user type from the following options:</p> <ul style="list-style-type: none"> ▪ User Assigned to Assets: This refers to the BUP users assigned to this asset. ▪ Business Users: This refers to users in the Business User Portal application. ▪ Data Intelligence Suit Users: This refers to users in the DI Suit application. ▪ External Users: This refers to users that are not present in BUP and DI Suite applications. Enter the email address of the users to assign this task. <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px; margin-top: 10px;">  <p>Selecting a User Type displays the group of users in the Select User field.</p> </div> |
| Select User | Select one or more users from the drop-down list. The users displayed in this drop-down list are based on the selected user type. |
| Filter Assigned Users | Use this option to search and manage the list of assigned users. If you have added multiple users for a task, you can search and delete users. |

5. Click **Submit**.

A task is created and added to the task list.

Once the task is created, use the following options:

- **Search** (🔍):
Use this option to search a task in the task list.
- **Refresh Tasks** (🔄):
Use this option to refresh the task list.
- **Show Completed Tasks** (☑️):
Use this option to view the completed tasks.
- **Export as Excel** (📄):
Use this option to export the task list to an excel file. Displays the list of users assigned to business assets and technical assets

You can also manage tasks in the Task List pane. [Managing tasks](#) involves:

- Marking a task complete
- Editing a task
- Adding comments to a task
- Deleting a task

Managing Tasks

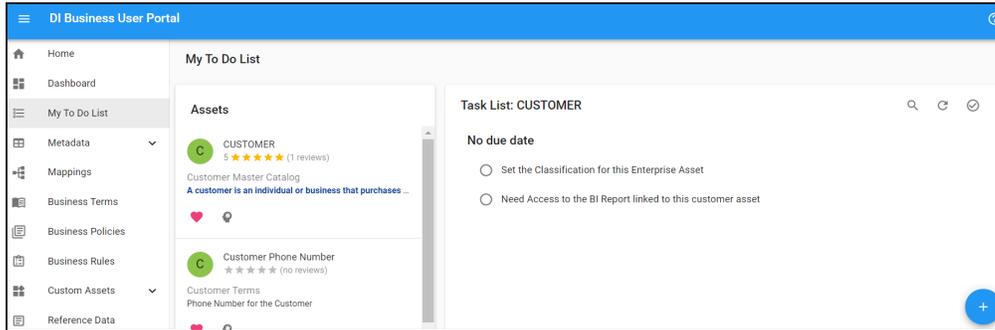
Managing tasks involves:

- Marking tasks complete
- Editing tasks
- Adding comments to tasks
- Deleting tasks

To manage tasks, follow these steps:

1. In the **Assets** pane, click an asset.

The Task List pane displays the tasks for the selected asset.

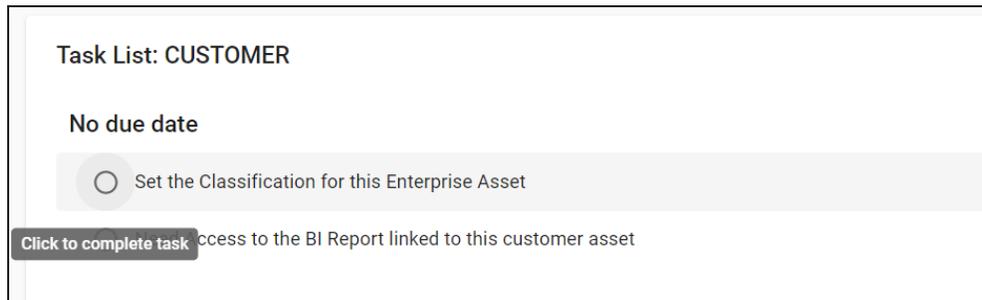


2. From the **Task List** pane, you can:

- **Marking a task complete (☑):**

To mark tasks complete, click the radio button for a task. The completed task disappears from the task list, and you can click ☑ to view the completed tasks list.

To restore a task, on the completed task list, click ☑. The restored task is added back to the task list.



- **Editing a task:**

To edit tasks, click a task. The Edit Task page appears.

Make relevant changes, and click **Update**

- **Adding comments to a task** (🗨️):

To add comments, from the Edit Task page, click 🗨️.

The **Comments** pane appears and displays comments from other users for a task.

You can add a comment in the **Comment** field and select user from the **Notify Assigned Users** drop-down list to notify them. Then, click **Submit**.

- **Deleting a Task** (🗑️):

From the Edit Task page, click 🗑️.

Configuration

After installing erwin DI Business User Portal (BUP), ensure that you have configured it in erwin Data Intelligence Suite (DI Suite). This is necessary so that you can use your data from erwin DI Suite in erwin DI BUP.

Once you have configured the application for use, configure user accounts.

This section walks you through [configuring erwin DI BUP](#) and [user accounts](#).

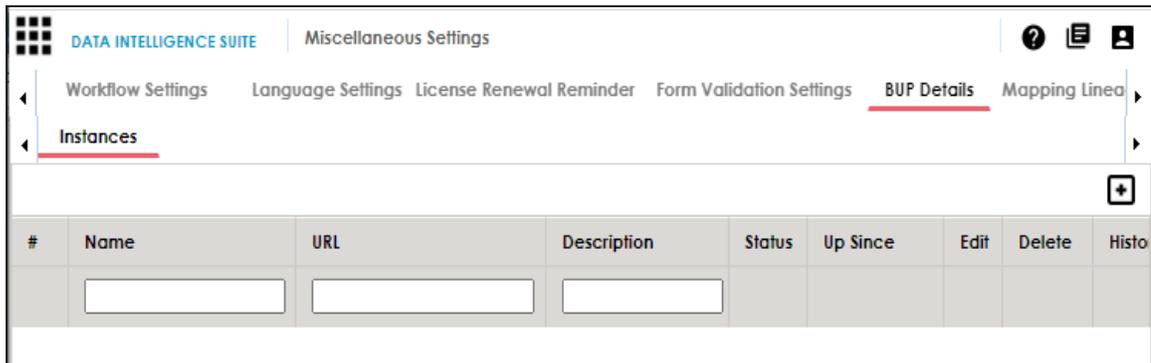
Configuring erwin DI BUP

Before you can use your erwin Data Intelligence Suite (DI Suite) data in erwin DI Business User Portal (BUP), you need to configure it in erwin DI Suite.

To configure erwin DI BUP , follow these steps:

1. In erwin DI Suite, go to **Application menu > Miscellaneous > Settings > Miscellaneous > BUP Details**.

The following page appears.



2. Click .

The New Instance page appears.

The screenshot shows a 'New Instance' dialog box with the following fields and controls:

- Name:** A text input field.
- URL:** A text input field with a red note below it: `http/https://:/ApplicationName`.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, and unlink.
- Buttons:** 'Save' and 'Cancel' buttons in the top right corner.

3. Enter a **Name**, **URL**, and **Description** of the erwin DI BUP instance.

For example:

- **Name:** Business User Portal
- **URL:** `http://myserver:8080/myBUP/login`
- **Description:** Business users can access modules of erwin DI Suite using erwin DI BUP.

4. Click **Save**.

The erwin DI BUP instance is added to the instance list.

For more information on erwin DI BUP configuration, refer to the [erwin DI Suite Bookshelf](#).

Configuring User Accounts

After configuring erwin DI Business User Portal (BUP), to enable your team to use it, you need to register users and assign them roles.

The Administrator user is available by default. You cannot delete or edit this user; except changing the password. To register other users, only an Administrator can create registration requests. Registration requests are sent to the users' email ID.

Once users complete registration, only an Administrator can assign roles to users. Roles are used to assign access-level permissions. You can also create roles and assign abilities to a role.

To summarize, configuring user accounts involves:

- [Adding users](#)
- [Adding roles](#)

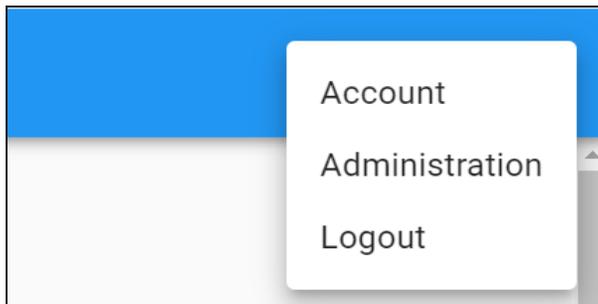
Roles

Roles enable you to assign access-level permissions to users. You can create a role and assign permissions based on the abilities that a role should have. Abilities map to application modules by default.

To create roles, follow these steps:

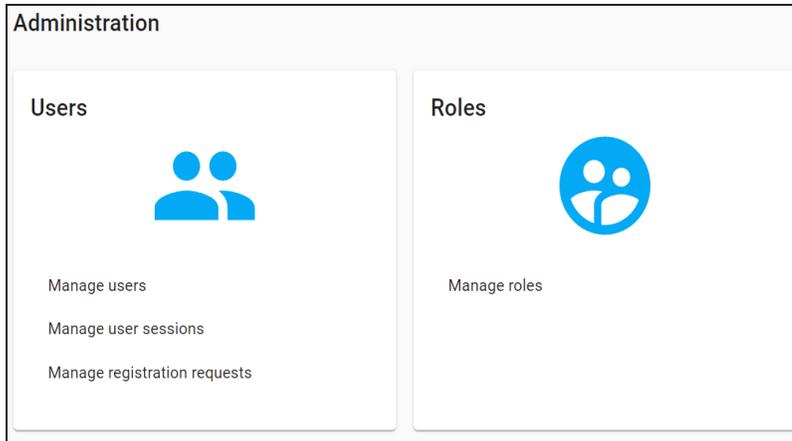
1. In the top pane, click .

The following options appear.



2. Click **Administration**.

The Administration page appears.



3. Under the **Roles** section, click **Manage roles**.

The Roles page appears.

4. Click **+**.

The Role Details page appears.

Role Details

Name*
Role name

Description
Role description

Abilities +

5. Enter or select appropriate values in the fields. Fields marked with an asterisk (*) are mandatory. Refer to the following table for field descriptions:

| Field Name | Description |
|--------------|---|
| Role Details | <ul style="list-style-type: none"> ▪ Name: Specifies the name of the role. For example, Business Analyst. |

| Field Name | Description |
|------------|--|
| | <ul style="list-style-type: none"> ▪ Description: Specifies the description of the role. For example: This role manages business terms, business policies, business rules, and custom assets. |
| Abilities | <p>Specifies the modules assigned to the role. For example, Business Rules. Click + and then, click ▼ to select abilities. You can add multiple abilities.</p> <div style="background-color: #e6f2ff; padding: 5px;">  <p>By default, each permission has a non-editable read right. Also, some permissions may have additional rights. You can select or discard them based on the requirement.</p> </div> <p>For example, Data Catalog has additional Create and Update rights. You can choose to use both, one, or none.</p> |

6. Click **Save**.

The role is saved and added to the Roles list.

| Roles | | | | | | |
|--------------------------|--|-------------------------------------|---------------------|-------------------------------------|---------------------|--|
| Actions | Name | Created By | Created At | Updated By | Updated At | |
| <input type="checkbox"/> |  public | System User | 05/08/2020 09:07 PM | System User | 05/14/2020 04:55 AM | |
| <input type="checkbox"/> |  Administrator | System User | 05/08/2020 09:07 PM | System User | 05/08/2020 09:07 PM | |
| <input type="checkbox"/> |  Business Analyst | Administrator - Default System User | 05/21/2020 01:40 PM | Administrator - Default System User | 05/21/2020 01:40 PM | |

Rows per page: 10 ▾ 1-3 of 3 < >

Once roles are created, you can manage roles. [Managing roles](#) involves:

- Updating roles
- Deleting roles

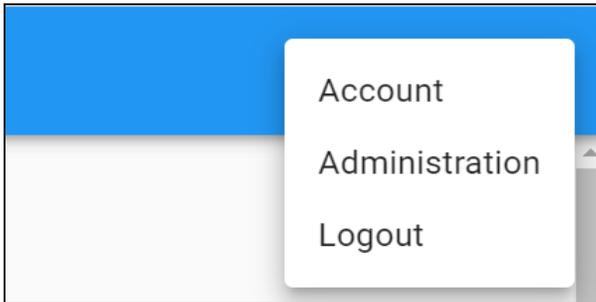
Managing Roles

Managing roles involves:

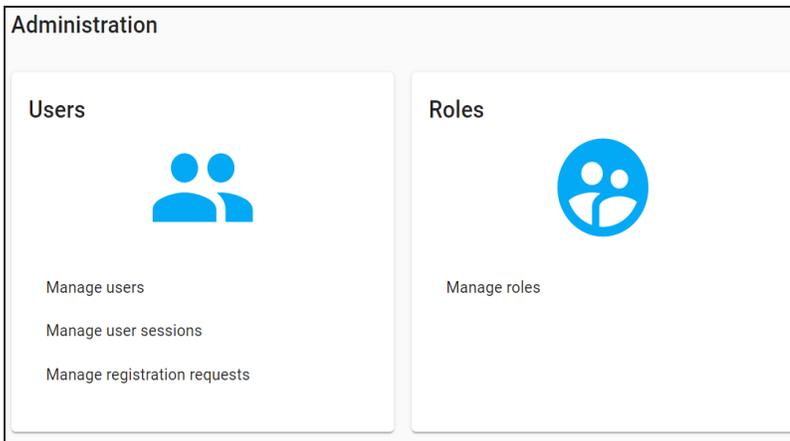
- Deleting roles
- Updating roles

To manage roles, follow these steps:

1. In the top pane, click .
The following options appear.



2. Click **Administration**.
The Administration page appears.



3. Under the **Roles** section, click **Manage roles**.
The Roles page appears. It displays all the available roles.

| Roles | | | | | | |
|--------------------------|------------------|-------------------------------------|---------------------|-------------------------------------|---------------------|--|
| Actions | Name | Created By | Created At | Updated By | Updated At | |
| <input type="checkbox"/> | public | System User | 05/08/2020 09:07 PM | System User | 05/14/2020 04:55 AM | |
| <input type="checkbox"/> | Administrator | System User | 05/08/2020 09:07 PM | System User | 05/08/2020 09:07 PM | |
| <input type="checkbox"/> | Business Analyst | Administrator - Default System User | 05/21/2020 01:40 PM | Administrator - Default System User | 05/21/2020 01:40 PM | |

Rows per page: 10 ▾ 1-3 of 3 < >

4. Click the required role.

The Role Details page appears.

Role Details

Name *

public

Description

Default public role

Abilities +

Associations

Read ×

5. Edit the role's **Name**, **Description**, and **Abilities**.

6. Click **Save**.

Use the following options to work on roles:

Delete ()

Use this option to delete roles that are not required any more.

Search (🔍)

Use this option to filter the required rows based on the role name.

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:

- Role Name
- Created By
- Created At
- Updated By
- Updated At

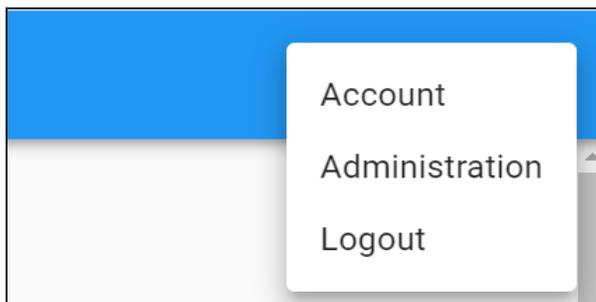
Adding Users

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:

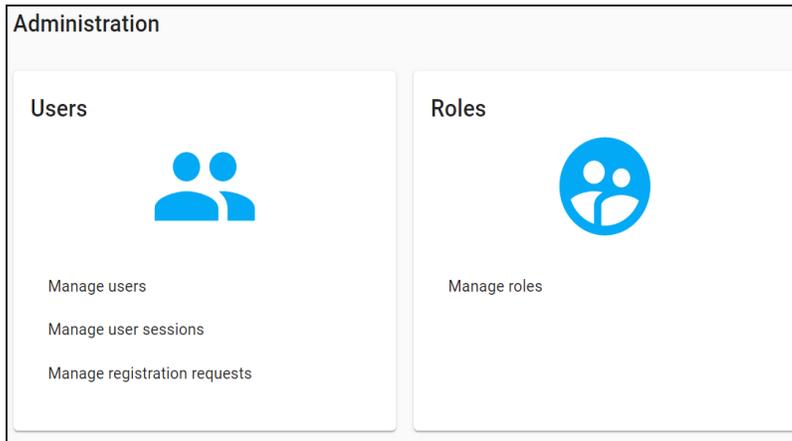
1. In the top pane, click .

The following options appear.



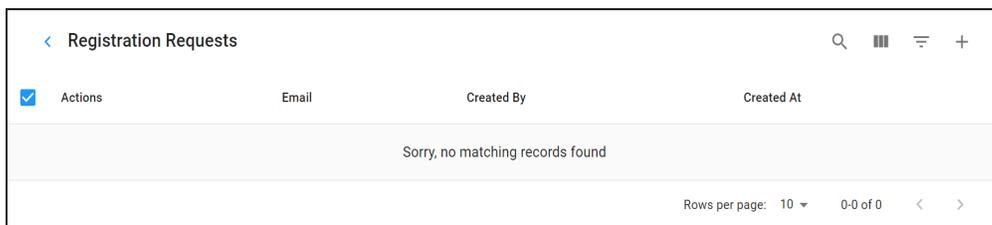
2. Click **Administration**.

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.

The screenshot shows the 'Send Registration Request' form. It has a title 'Send Registration Request' and a prompt: 'Please provide email address to send the registration request.' Below the prompt is a label 'Email Address *' and an input field with the placeholder text 'Email'. At the bottom right of the form are two buttons: 'CANCEL' in red and 'SAVE' in grey.

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.

| Actions | Email | Created By | Created At |
|---------|-----------------|-------------------------------------|---------------------|
| | sojha@erwin.com | Administrator - Default System User | 05/27/2020 09:16 AM |

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

1. Click to open the registration form.

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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

Once users are created, you can manage them. [Managing users](#) involves:

- Assigning roles
- Sending forgot password emails
- Changing passwords

You can also manage user sessions. For more information on managing user sessions, refer to the [Managing User Sessions](#) topic.

Managing Users

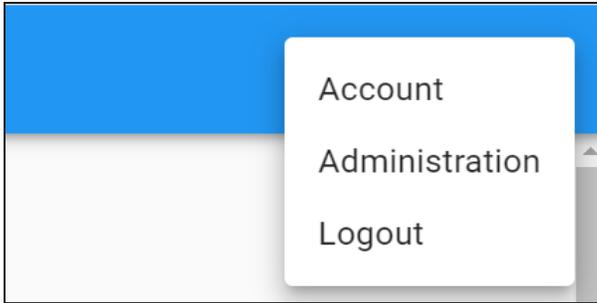
Managing users involves:

- Assigning roles
- Sending forgot password emails
- Changing passwords

You can assign roles based on the tasks that a user should be able to perform. Ensure that you have configured roles and registered users.

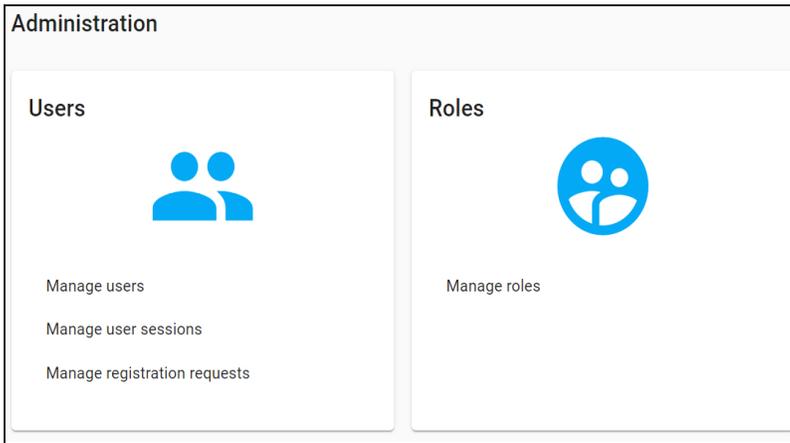
To manage users, follow these steps:

1. In the top pane, click .
The following options appear.



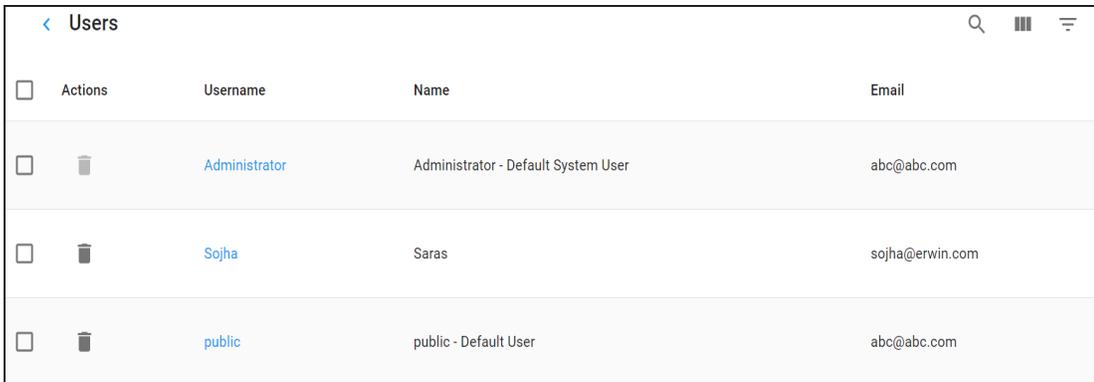
2. Click **Administration**.

The Administration page appears.



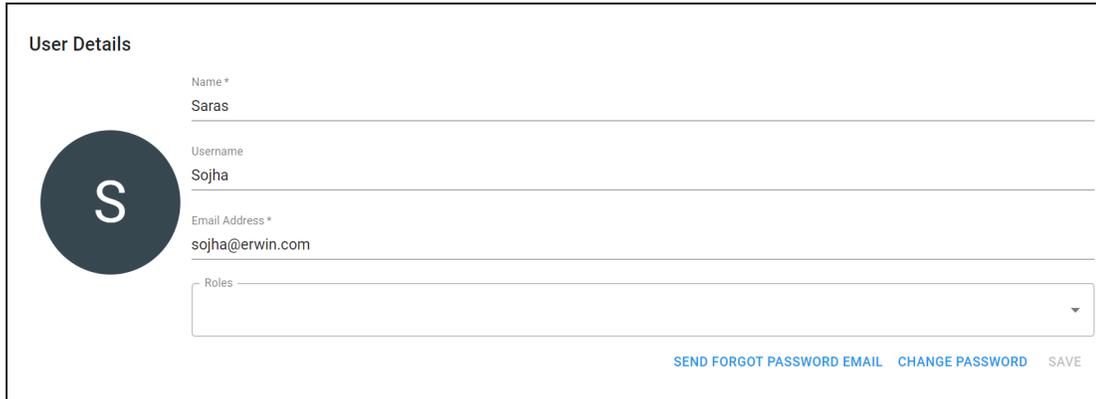
3. Under the **Users** section, click **Manage Users**.

The Users page appears. It displays all the registered users.



4. Click the required user.

The User Details page appears.



The screenshot shows a 'User Details' form. On the left is a circular profile picture with a white 'S' on a dark background. To the right of the profile picture are four input fields: 'Name*' containing 'Saras', 'Username' containing 'Sojha', 'Email Address*' containing 'sojha@erwin.com', and 'Roles' which is an empty dropdown menu. At the bottom right of the form are three links: 'SEND FORGOT PASSWORD EMAIL', 'CHANGE PASSWORD', and 'SAVE'.

5. Use the following options:

Roles

Use this option to select and assign roles. After you select roles, click **Save**.

Send Forgot Password Email

Use this option to send an email to reset password.

Change Password

Use this option to change the user's password of the user.

6. Click **Save**.

Use the following options to work on users:

Delete (🗑️)

Use this option to delete users that are not required any more.

Search (🔍)

Use this option to search users.

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:

- Username
- Name
- Email

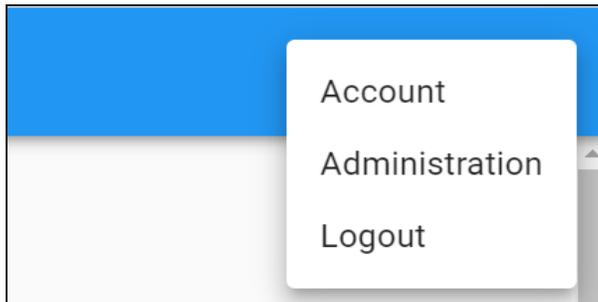
Managing User Sessions

You can manage user sessions and end them based on your requirements.

To manage user sessions, follow these steps:

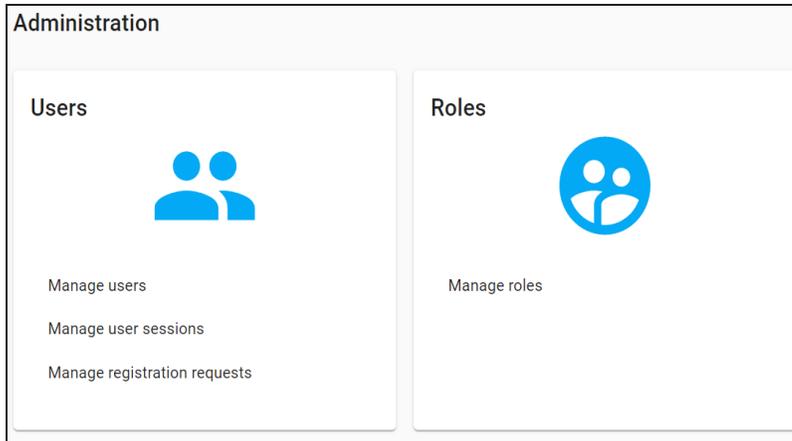
1. In the top pane, click .

The following options appear.



2. Click **Administration**.

The Administration page appears.



3. Under the **Users** section, click **Manage user sessions**.

The Sessions page appears. It displays all the active sessions.

The screenshot shows the 'Sessions' page with a table of active sessions. The table has columns for Actions, Username, User Type, IP Address, Issued At, and Expires At. There are two rows of data.

| <input type="checkbox"/> | Actions | Username | User Type | IP Address | Issued At | Expires At |
|--------------------------|---------|---------------|-----------|---------------|---------------------|---------------------|
| <input type="checkbox"/> | | Administrator | PLATFORM | 183.83.135.30 | 05/27/2020 06:55 PM | 05/27/2020 07:15 PM |
| <input type="checkbox"/> | | Sojha | PLATFORM | 183.83.135.30 | 05/27/2020 06:56 PM | 05/27/2020 07:16 PM |

4. In the required row, Click . Or, select the required rows. Then, click on the top-right corner.

The selected sessions are terminated.

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](#)

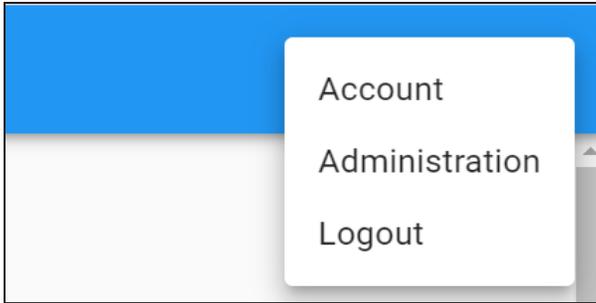
On-boarding Users

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:

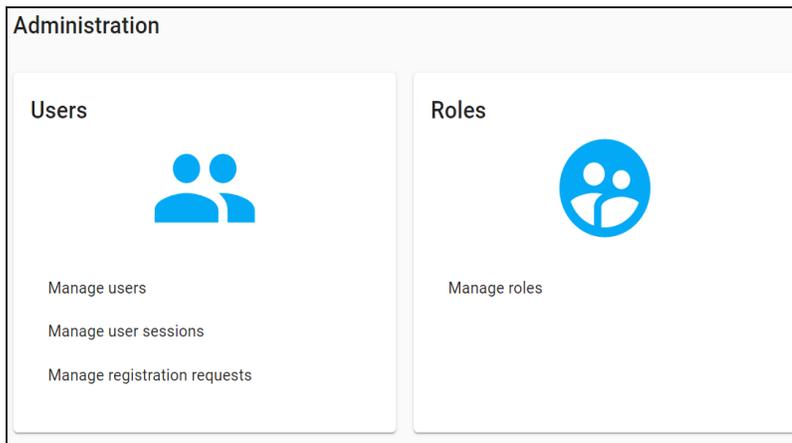
1. In the top pane, click .

The following options appear.



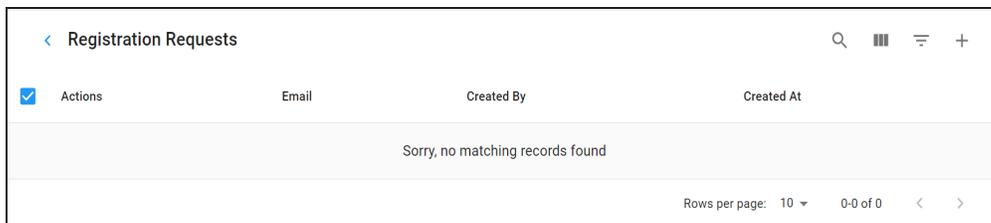
2. Click **Administration**.

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.

| Registration Requests | | | | 🔍 | ☰ | ☰ | + |
|--------------------------|---|-----------------|-------------------------------------|---------------------|---|---|---|
| <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.



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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.

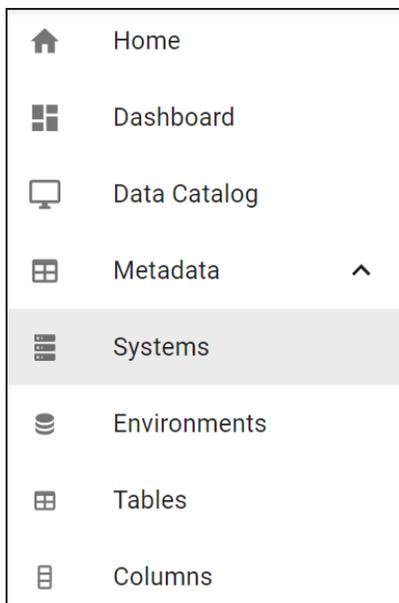
Systems

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:

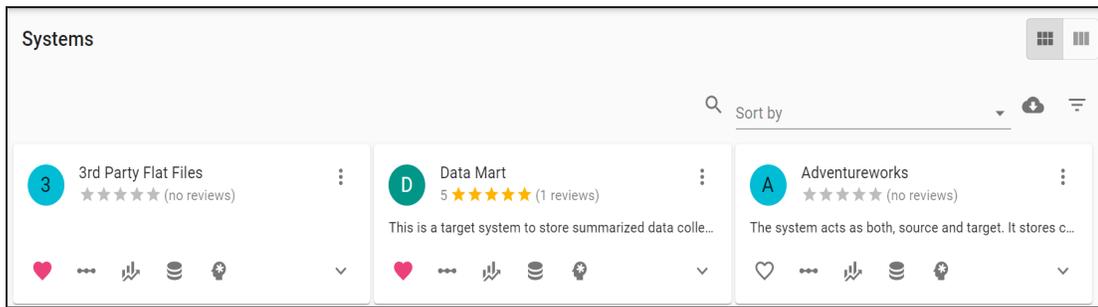
1. In the menu, expand the **Metadata** node.

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



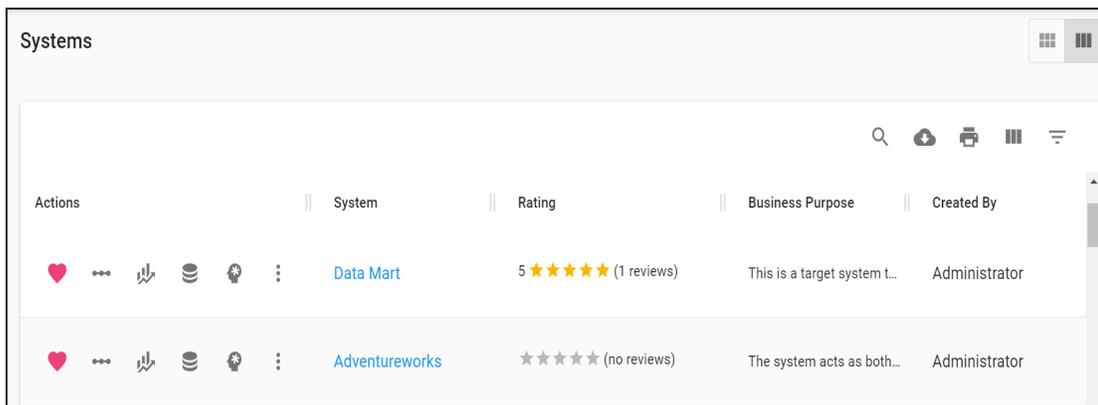
2. Click **Systems**.

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.

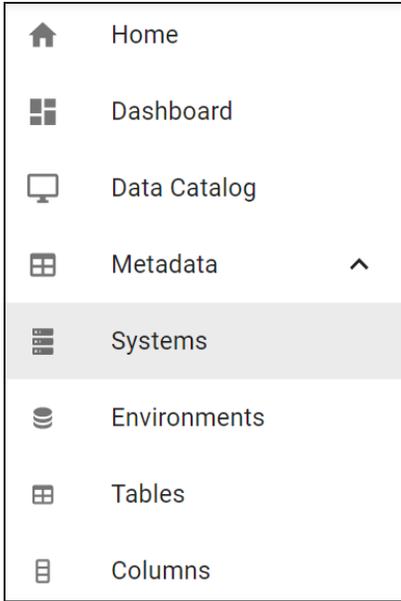
Environments

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:

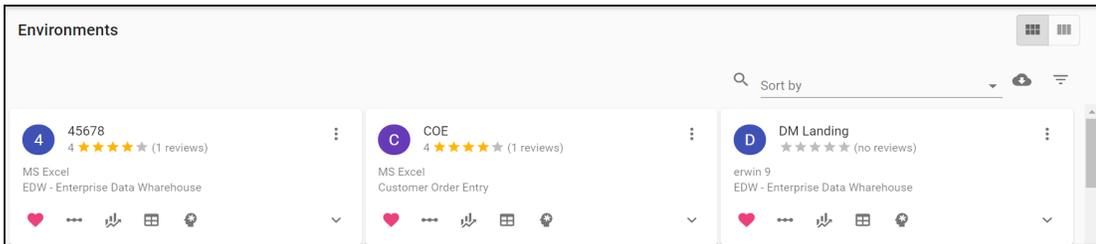
1. In the menu, expand the **Metadata** node.

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.

| Actions | Environment | Rating | System | Environment Type | DBMS Name |
|---|-------------|---------------------|-------------------------|------------------|----------------|
|       | 45678 | 4 ★★★★★ (1 reviews) | EDW - Enterprise Dat... | | |
|       | COE | 4 ★★★★★ (1 reviews) | Customer Order Entry | test | MS Excel File |
|       | DM Landing | ★★★★★ (no reviews) | EDW - Enterprise Dat... | test | ERWin XML File |

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.

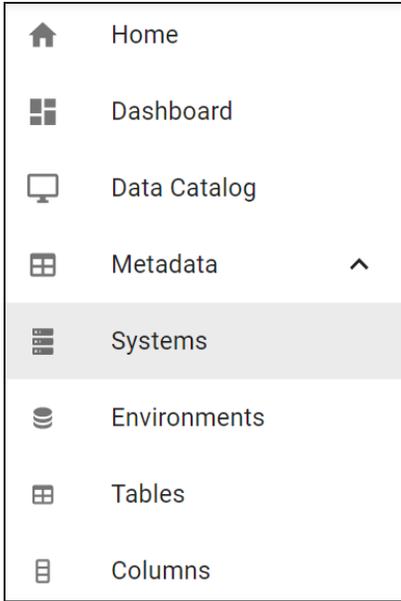
Tables

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:

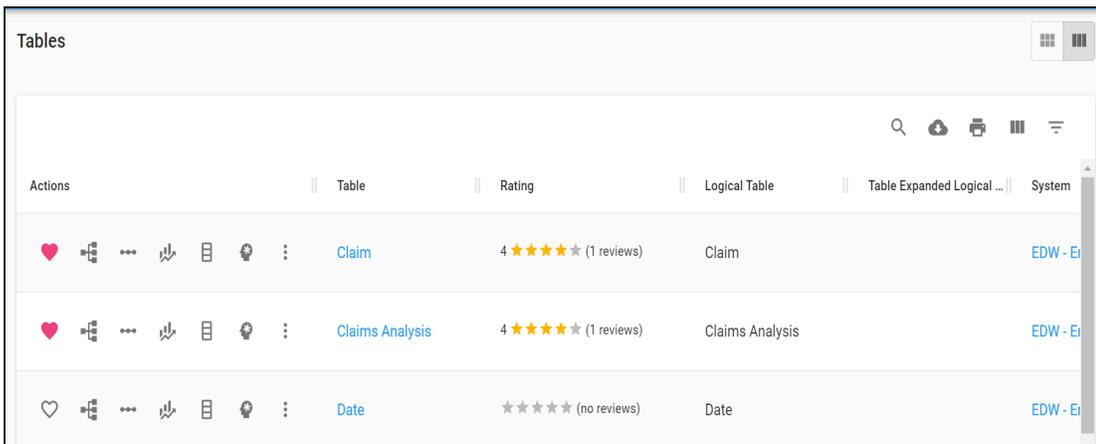
1. In the menu, expand the **Metadata** node.

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.

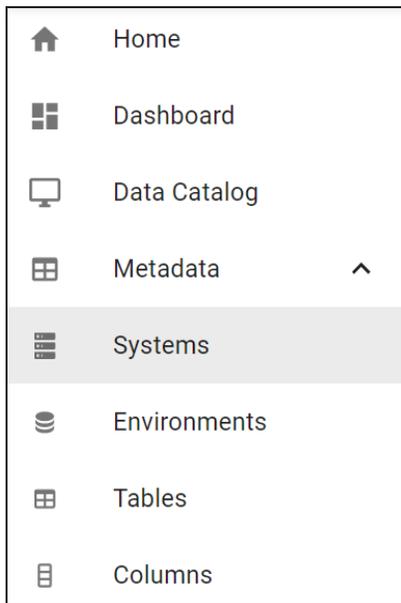
Columns

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:

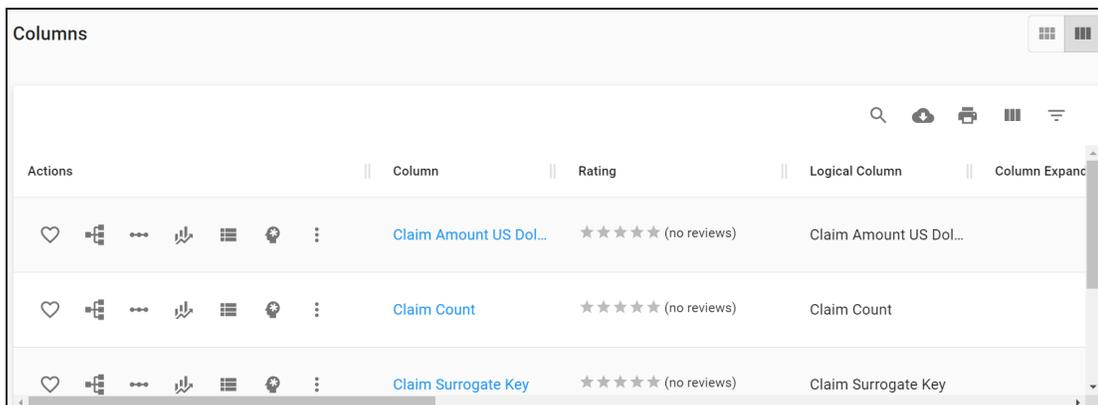
1. In the menu, expand the **Metadata** node.

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.

| 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.

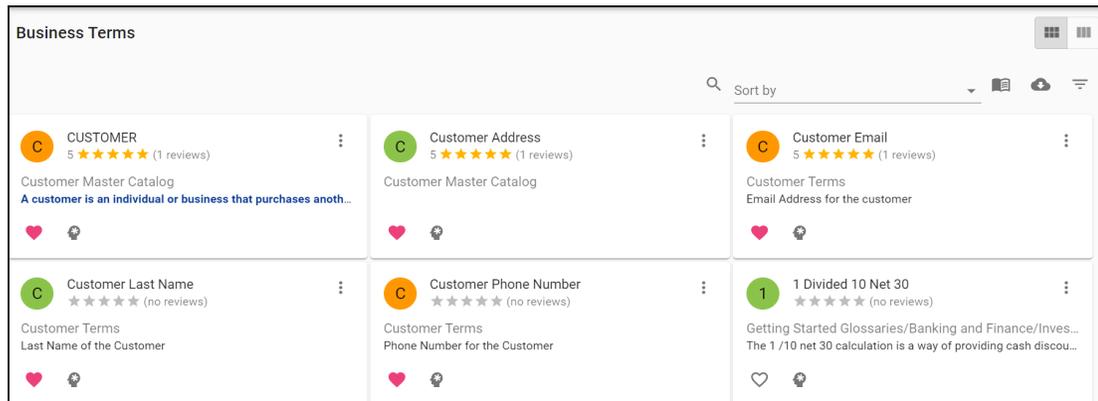
Business Terms

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:

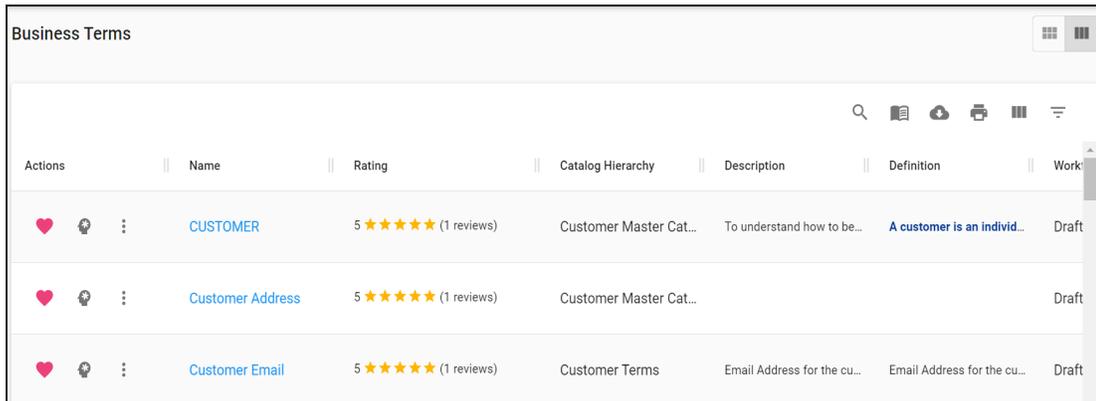
1. In the menu, click **Business Terms**.

By default, the Business Terms card view appears.



2. Click .

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



| 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 |

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

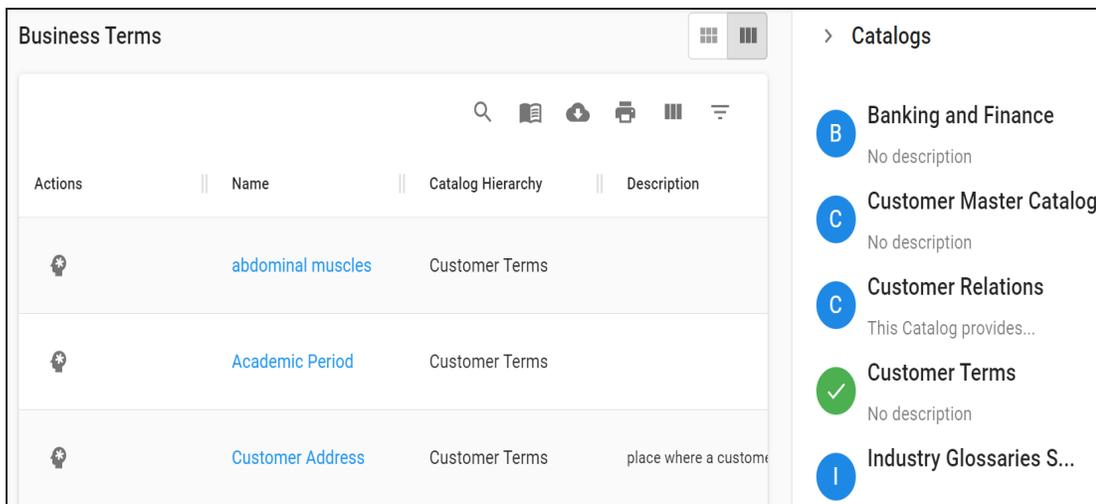
Search

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.

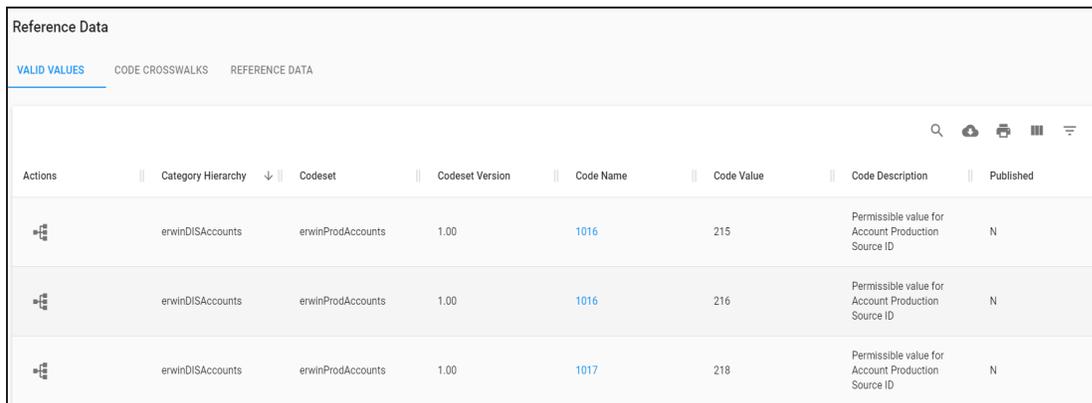
For more information on business terms and other business assets refer to the [Data Literacy](#) section.

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.



| 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 | | | | | |
| erwinTechPubs | Alpha | 06/06/2020 | janedoe | erwinProdAccounts | Administrator | | | | | |
| erwinTechPubs | Alpha | 06/06/2020 | janedoe | Informatica_m_CBDR_BD M_CASA | Administrator | | | | | |
| erwinTechPubs | Alpha | 06/06/2020 | janedoe | Account_Claims | 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 | | | | | |
| 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

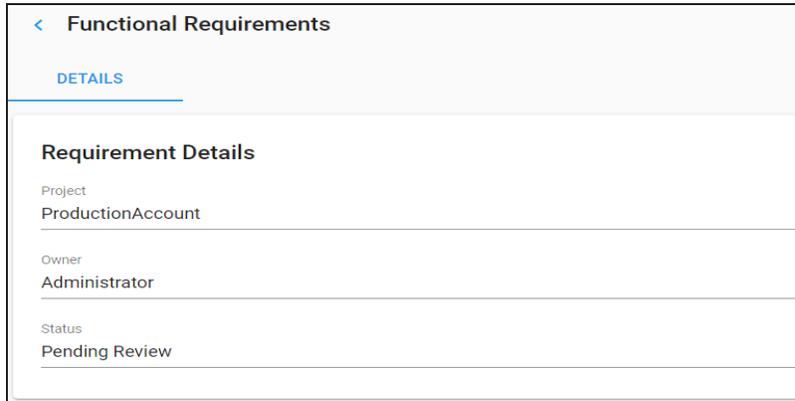
are not required in the grid.

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>.



The screenshot shows a web interface for 'Functional Requirements'. Under the 'DETAILS' tab, there is a section titled 'Requirement Details'. It lists the following information:

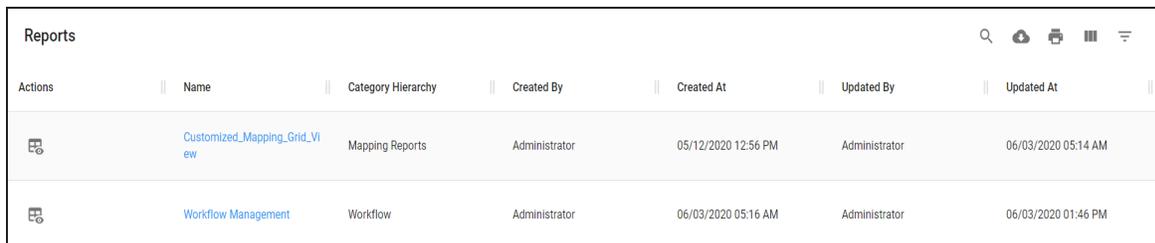
| | |
|---------|-------------------|
| Project | ProductionAccount |
| Owner | Administrator |
| Status | Pending Review |

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 a '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 |
|---------|--|--------------------|---------------|---------------------|---------------|---------------------|
| | Customized_Mapping_Grid_View | Mapping Reports | Administrator | 05/12/2020 12:56 PM | Administrator | 06/03/2020 05:14 AM |
| | Workflow Management | 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.