



erwin DI Business User Portal

Data Literacy Guide

Release v11.0

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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
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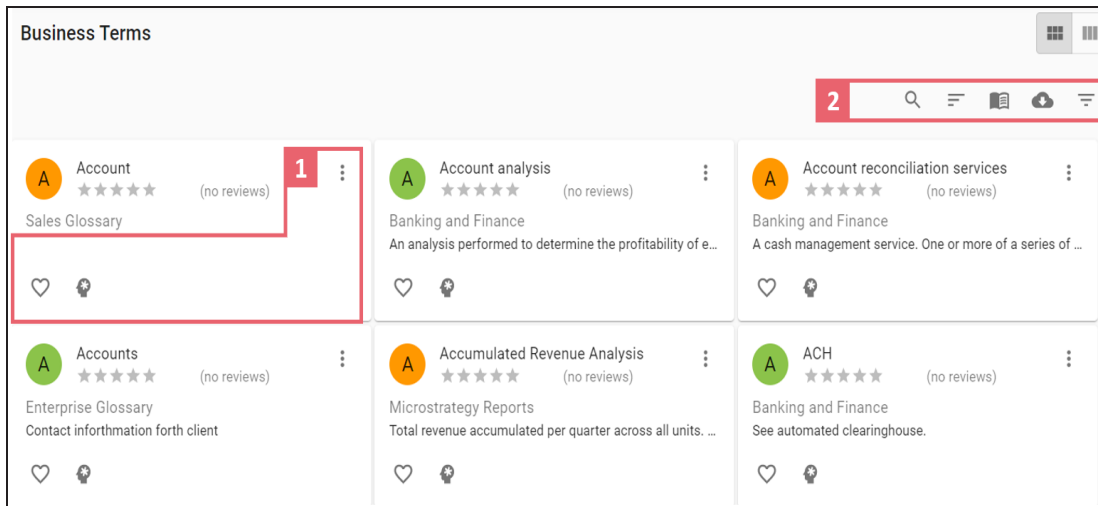
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Business Glossary

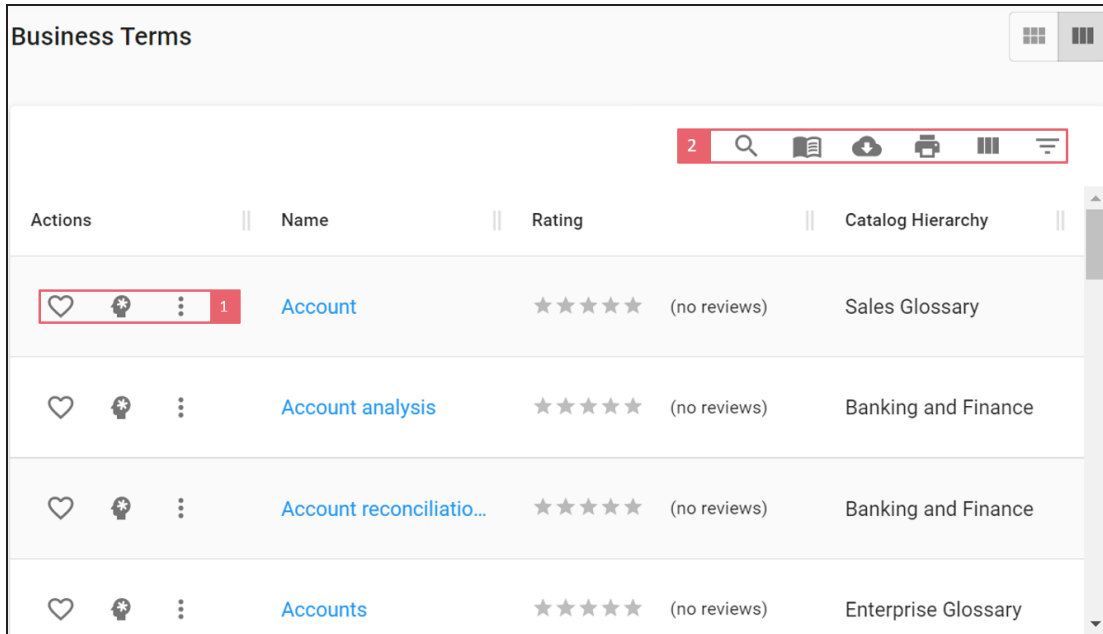
By default, erwin Data Intelligence Suite (DI Suite) has three types of business assets, business terms, business policies, and business rules. You can view these business assets in erwin DI Business User Portal (BUP) under Business Terms, Business Policies, and Business Rules. Custom asset types defined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

To view business assets, on the application 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 **1-Actions** section and **2-Filter** and Export Options.

UI Section	Options	Description
1-Action Section		Use this option to mark an asset favorite. This helps in searching an asset.
		Use this option to view mind map of an asset.
		Use this option to create tasks .

UI Section	Options	Description
2-Filter and Export Options		Use this option to search required assets.
		Use this option to sort assets in alphabetical or reverse alphabetical order. This option is available only in the card view.
		Use this option to manage access to 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 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](#)

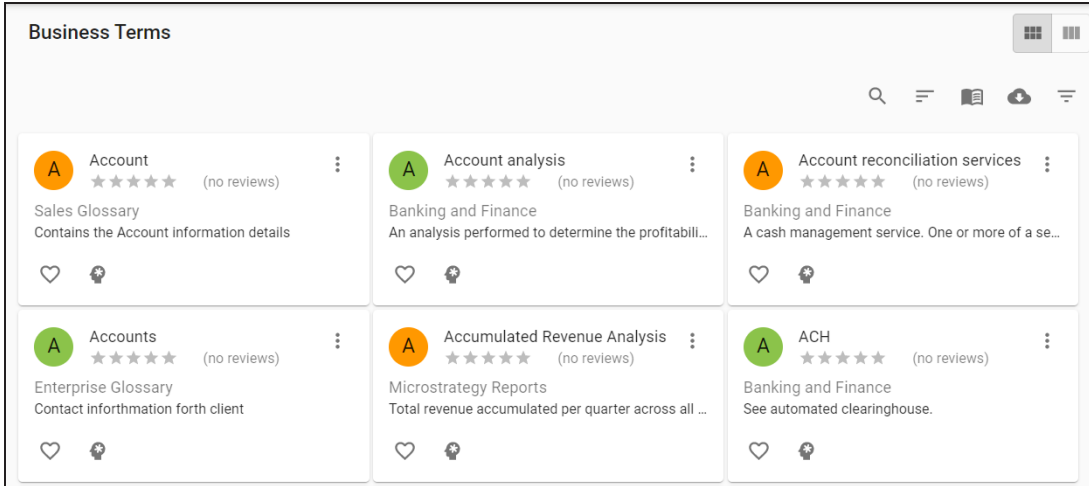
Business Terms

erwin DI Business User Portal (BUP) gives you access to view a business term's details, associations, valid values, mind map, and add assets to My Actions. 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 application menu, click **Business Terms**.

By default, the Business Terms card view appears.



You can add the asset to available Actions based on your requirement.

2. Click .

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

The screenshot shows a table of business terms with the following columns: Actions, Name, Rating, Catalog Hierarchy, Description, Definition, and Work.

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, Extended Properties, Workflow Details, Audit Detail, and Documents sections.

The screenshot shows the 'CUSTOMER' business term details page. At the top, there is a breadcrumb '< CUSTOMER' and a rating of 5 stars with 1 review. Below this are three tabs: 'DETAILS' (selected), 'ASSOCIATIONS', and 'VALID VALUES'. The main content is divided into three sections: 1. 'Business Term Details' containing 'Name' (CUSTOMER), a description, and a definition. 2. 'Classification Details' containing 'Catalog' (Customer Master Catalog), a 'Sensitive Data Indicator (SDI)' toggle, and 'Sensitive Data Classification' (PII). 3. 'User Defined Properties' and 'Workflow Details' (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.

CUSTOMER
5 ★★★★★ (1 reviews)

DETAILS **ASSOCIATIONS** VALID VALUES

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.

> **Association**

Association Details

Source Name
CUSTOMER

Source Type
Business Term

Relationship Name
Represents

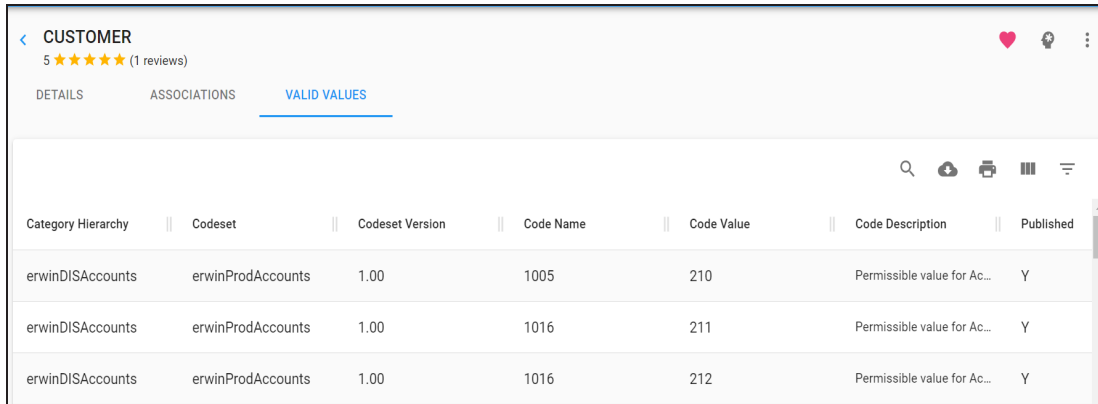
Target Name
CitizenID

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.



Category Hierarchy	Codeset	Codeset Version	Code Name	Code Value	Code Description	Published
erwinDISAccounts	erwinProdAccounts	1.00	1005	210	Permissible value for Ac...	Y
erwinDISAccounts	erwinProdAccounts	1.00	1016	211	Permissible value for Ac...	Y
erwinDISAccounts	erwinProdAccounts	1.00	1016	212	Permissible value for Ac...	Y

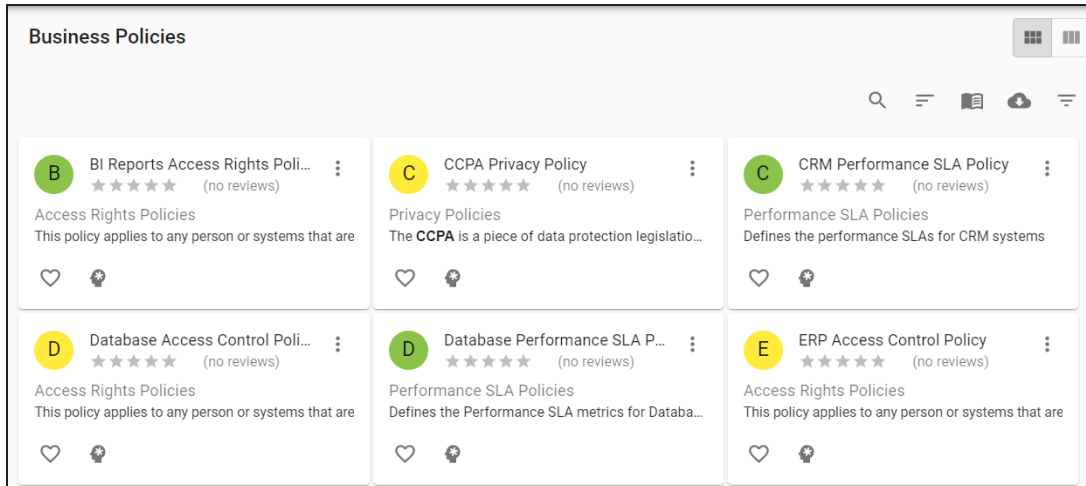
Business Policies

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

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

1. On the application menu, click **Business Policies**.

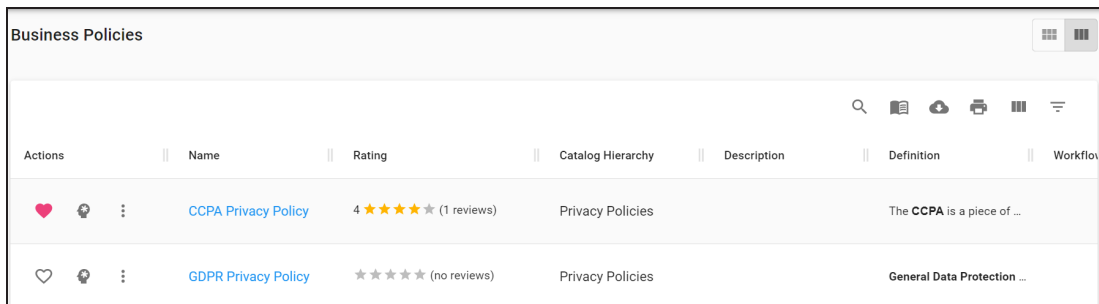
By default, the Business Policies card view appears.




You can add the asset to available Actions based on your requirement.

2. Click .

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



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.

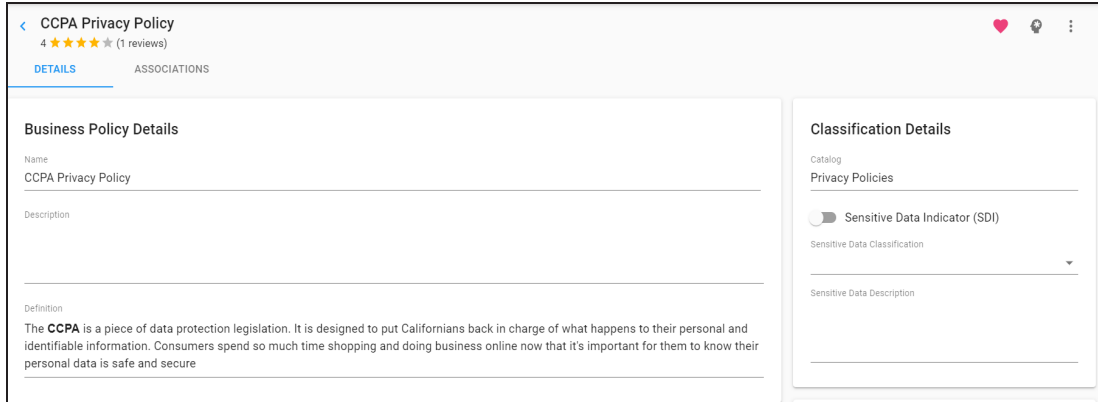
To view mind maps of business policies, click . For more information on mind maps, refer to the [Mind Maps](#) topic.

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, Extended Properties, Workflow Details, Audit Detail, and Documents sections.



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.

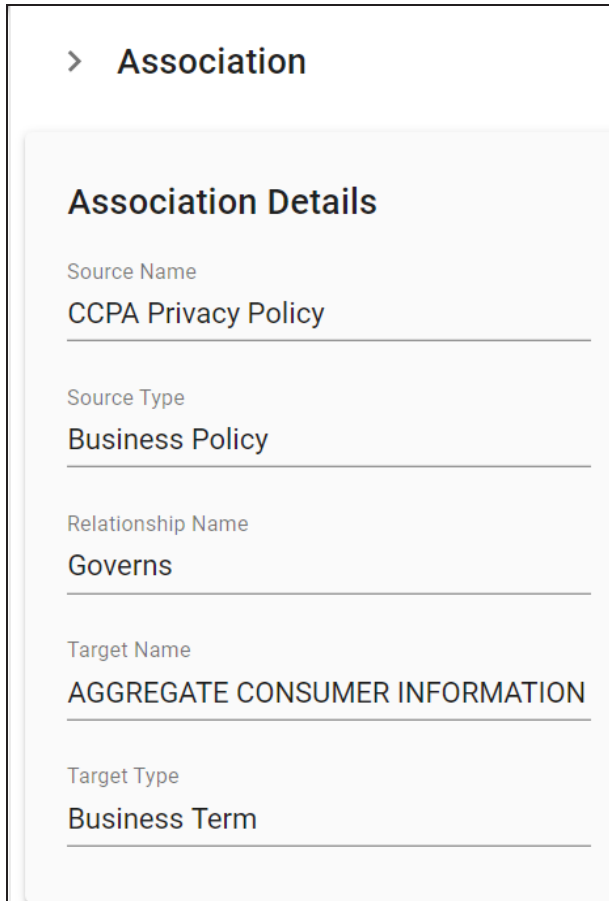
The list of associated assets appears. You can click the <Asset_Name> appearing as hyper-link to view its details.

Actions	Name	Type	Catalog Hierarchy	Relationship
	AGGREGATE CONSUMER INFORM...	Business Term	CCPA Glossary	Governs
	BIOMETRIC DATA	Business Term	CCPA Glossary	Governs
	BUSINESS PURPOSE	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.



Business Rules

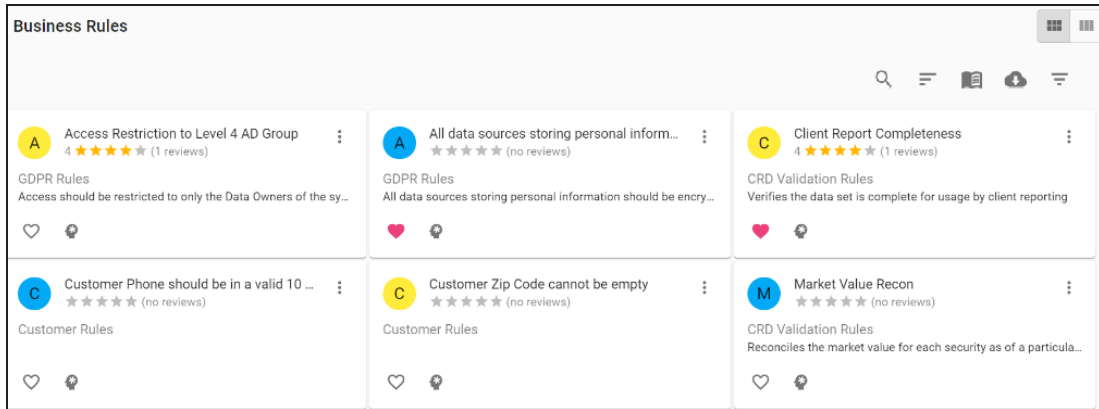
erwin DI Business User Portal (BUP) gives you access to view a business rule's details, associations, mind map , and add assets to My Actions. You can view a list of all the business rules and navigate through the list using advance filtering mechanisms to find the required

business rule. You can also analyze miscellaneous and extended properties of a business rule.

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

1. On the application menu, click **Business Rules**.

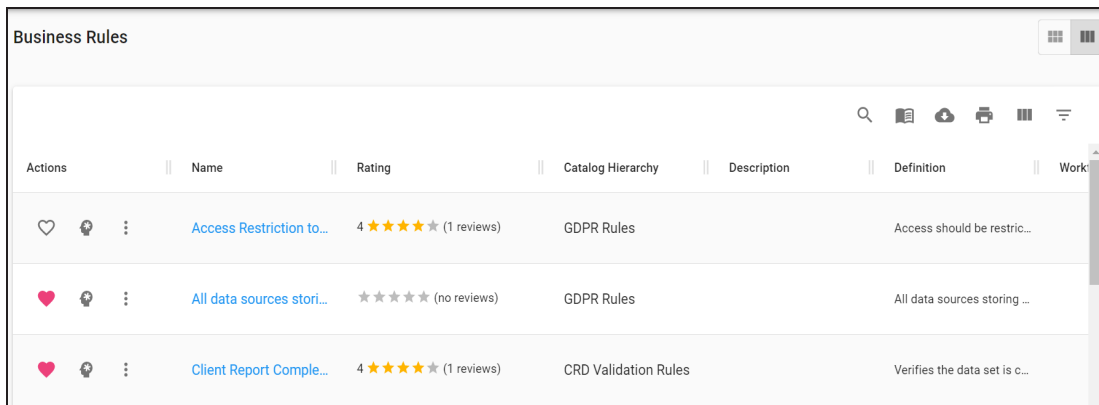
By default, the Business Rules card view appears.




You can add the asset to available Actions based on your requirement.

2. Click .

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



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.

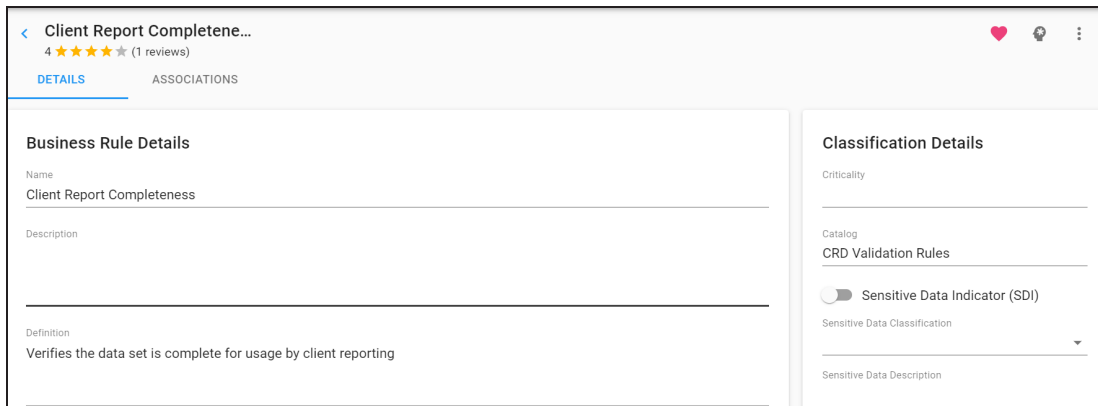
To view mind maps of business rules, click . For more information on mind maps, refer to the [Mind Maps](#) topic.

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 <Business_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, Extended Properties, Workflow Details, Audit Detail, and Documents sections.



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 hyperlink to view its details.

Client Report Completeness
4 ★★★★★ (1 reviews)

DETAILS ASSOCIATIONS

Actions	Name	Type	Catalog Hierarchy	Relationship
	Customer Address	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.

> Association

Association Details

Source Name
Client Report Completeness

Source Type
Business Rule

Relationship Name
is associated with

Target Name
Customer Address

Target Type
Business Term

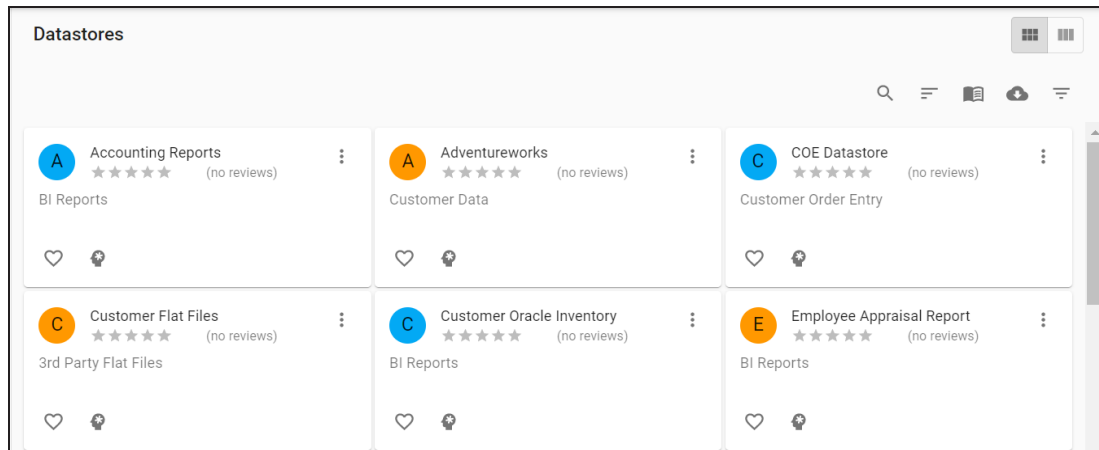
Custom Assets

erwin DI Business User Portal (BUP) gives you access to view a custom object's details, associations, mind map, and add assets to My Actions. 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. On the application menu, click **Custom Assets**.
It expands to display available custom assets.
2. Click <Asset_Type_Name>.

By default, the <Asset_Type_Name> card view appears.



3. Click .

The <Asset_Type_Name> grid appears.

Actions	Name	Rating	Description	Catalog Name	Catalog Hierarchy	Workflow Status
♥ ⚙ ⋮	Accounting Reports	★★★★★ (no reviews)		BI Reports	BI Reports	
♥ ⚙ ⋮	Adventureworks	★★★★★ (no reviews)		Customer Data	Customer Data	
♥ ⚙ ⋮	COE Datastore	★★★★★ (no reviews)		Customer Order Entry	Customer Order Entry	
♥ ⚙ ⋮	Customer Flat Files	★★★★★ (no reviews)		3rd Party Flat Files	3rd Party Flat Files	
♥ ⚙ ⋮	Customer Oracle Inve...	★★★★★ (no reviews)		BI Reports	BI Reports	

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.

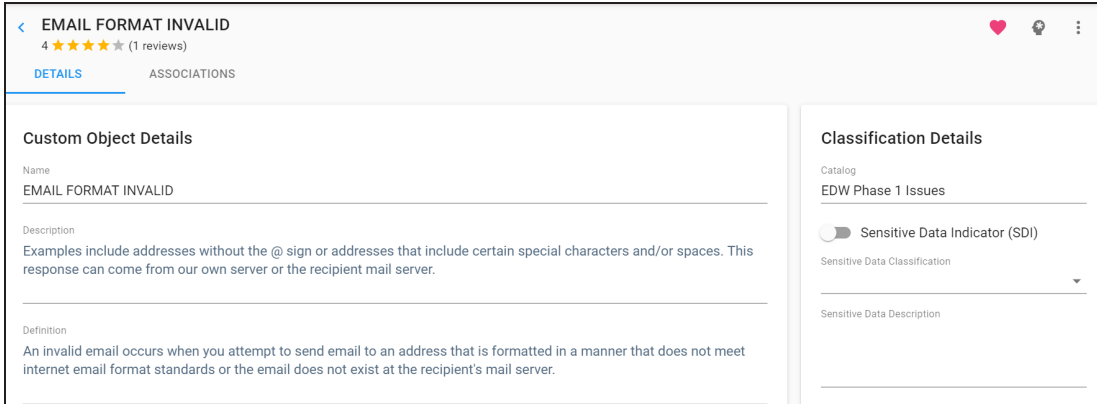
To view mind maps of custom objects, click . For more information on mind maps, refer to the [Mind Maps](#) topic.

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.



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**

Search, Print, Filter, Sort icons

Actions	Name	Type	Catalog Hierarchy	Relationship
	ACCOUNT	Table		
	Accounts	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.

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

DETAILS ASSOCIATIONS

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

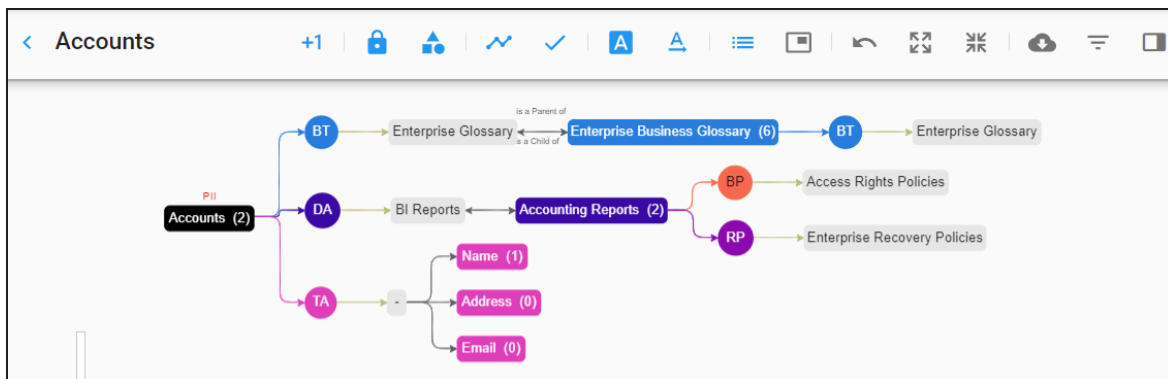
Target Name
Accounts

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.

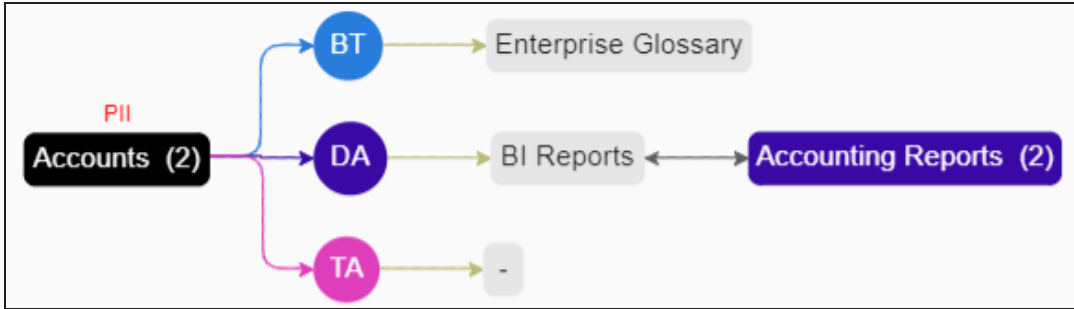
To view mind map of business assets, in the <Business_Asset> grid, click .



Use the following options to work on the mind map:

View Counts (+1)

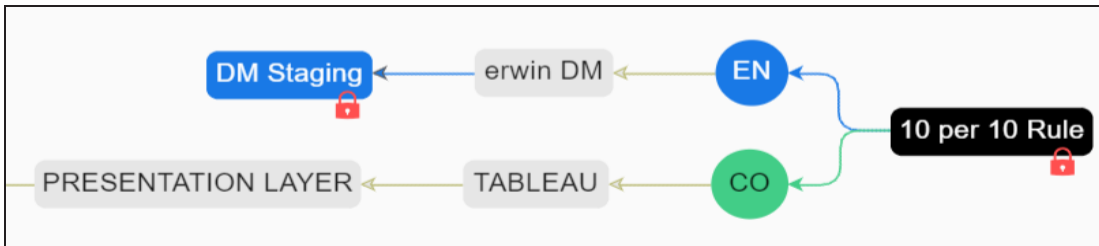
Switch **View Counts** to  to view number of associations. For example, the following mind map displays the number of associations of the Accounts business term as two.



View Sensitivity Data Indicator (🔒)

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

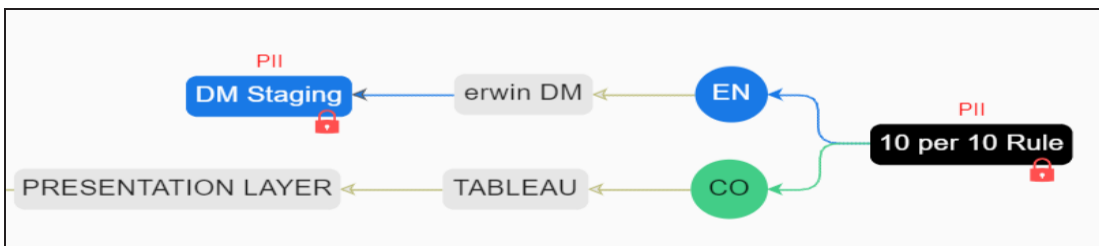
For example, the following mind map displays the sensitivity data indicator as sensitive (🔒) for the 10 per 10 Rule business term.




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.

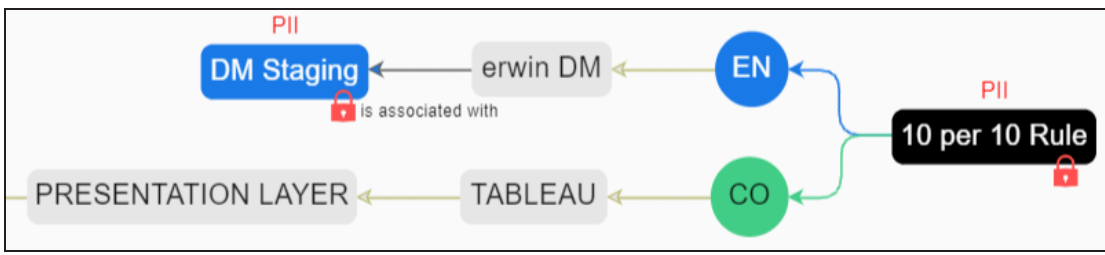
For example, the following mind map displays the relationship between business term and column in blue color and Zig Zag type display.




Include Relationships ()

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

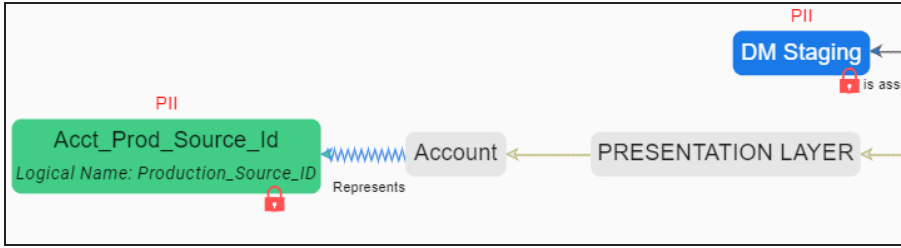
For example, the following mind map displays the relationships between an environment and business term (is associated with).




Logical Names ()

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

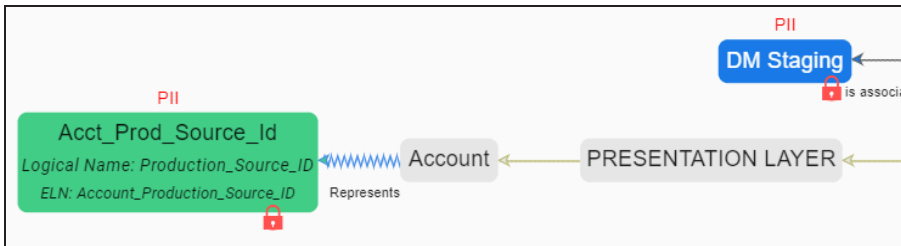
For example, the following mind map displays a column's logical name.



Expanded Object Logical Names (A)

Switch **Expanded Object Logical Names** to  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.

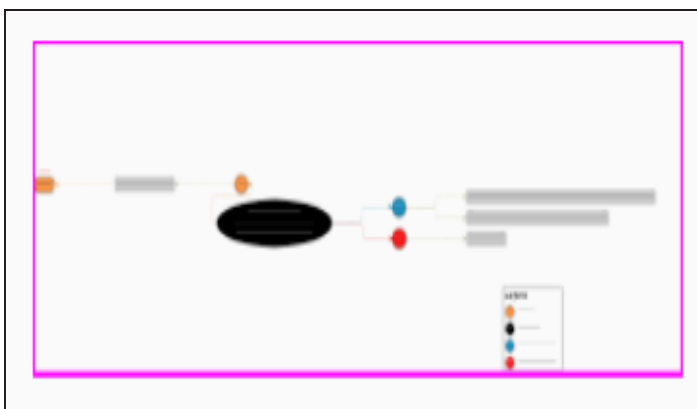


Legend (≡)

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

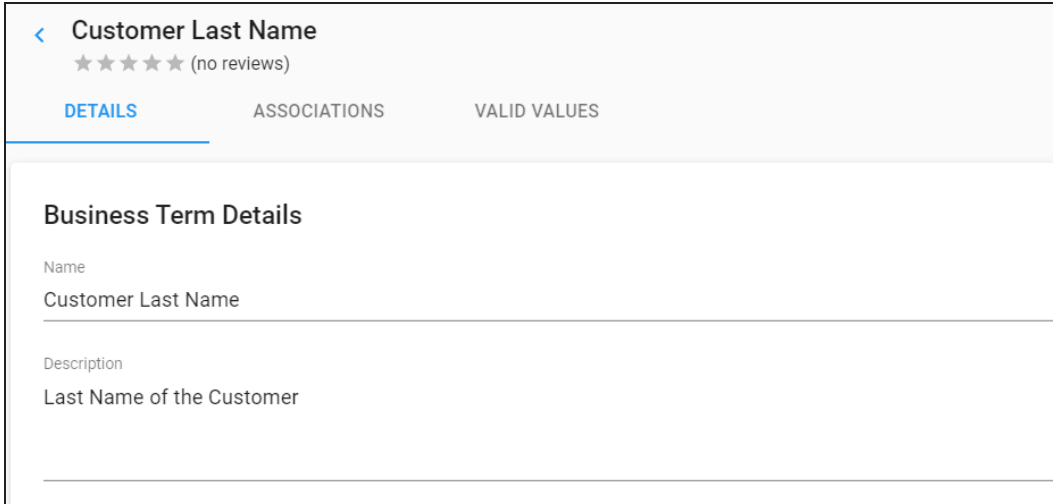
Click an asset on mind map to view its properties with association statistics under this pane. The properties of a technical asset differs from that of a business asset.

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.

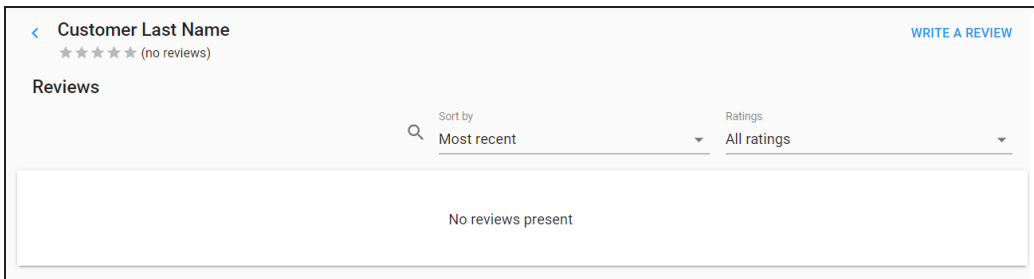
To review and rate an asset, follow these steps:

1. In the <Business_Asset> grid, click an asset.
The <Business_Asset_Name> page appears.



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.

Customer Last Name

Rating

★ ★ ★ ★ ★

Title

Review

RESET CANCEL SAVE

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!
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:

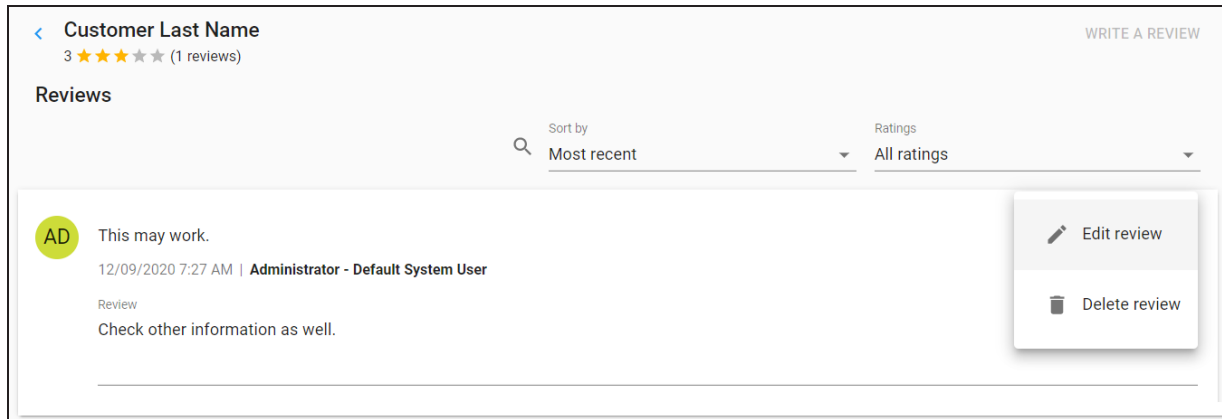
- **Edit Review:**

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 catalogs in business glossary in the following ways:

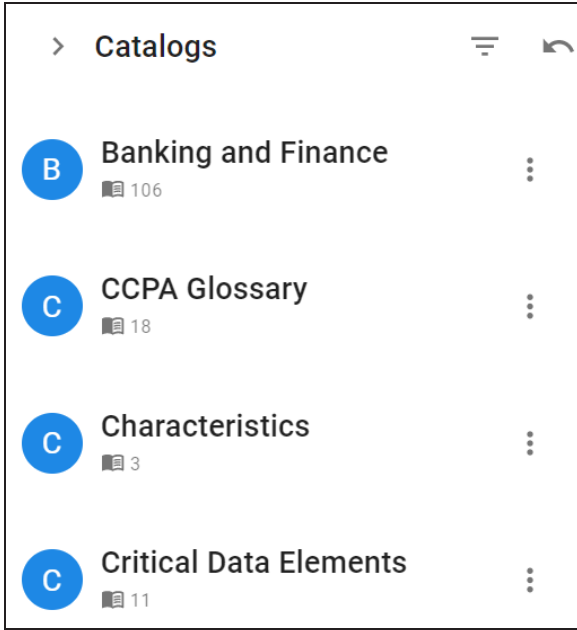
- Assigning roles
- Assigning users


Assigning Roles

To manage access via roles, follow these steps:

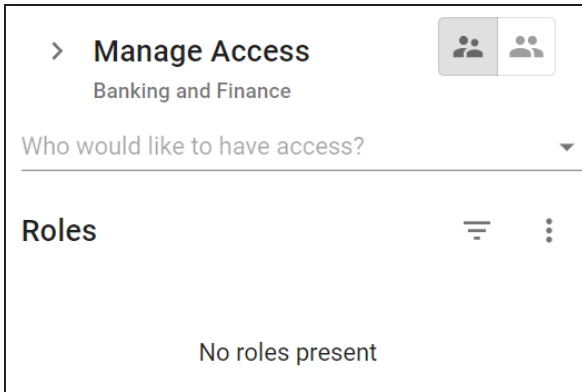
1. In the <Business_Asset> page, click .

The Catalogs pane appears.



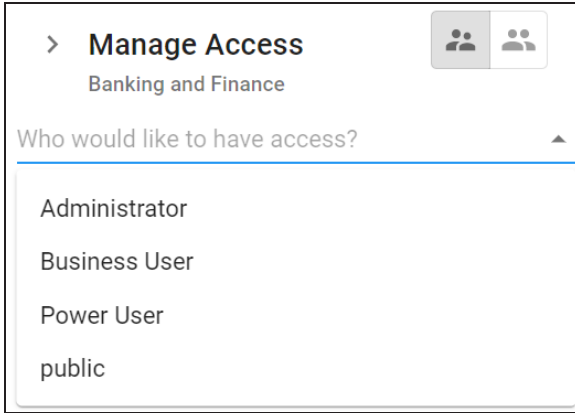
2. Select a catalog and click . Then, click **Manage Access**.

The Manage Access pane appears. By default, it is set work for Roles ().




3. Click .

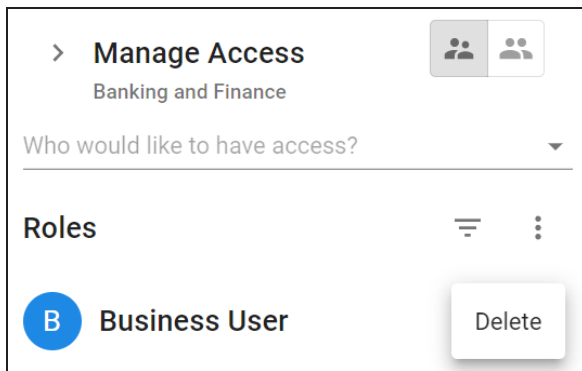
The available roles appears.



4. Select a role.


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

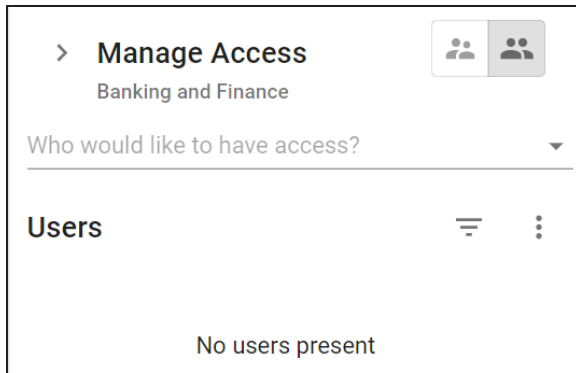
To revoke access of a role or delete it from the assigned roles list, click . Then, click **Delete**.



Assigning Users

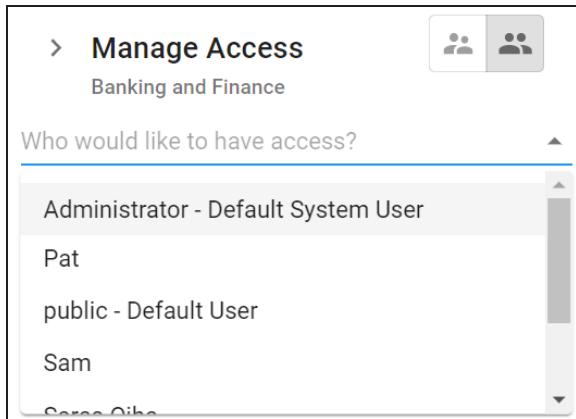
To manage access via users, follow these steps:

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




2. Click .

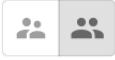
The available users appears.




3. Select a user.



The selected user is assigned to the asset.


To revoke access of a user or delete it from the assigned users list, list, click . Then, click **Delete**.

> **Manage Access** 

Banking and Finance

Who would like to have access? 

Users  

 **Pat** 