erwin DI Business User Portal

User Guide

Release v11.0

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Contact erwin

Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

Access the erwin support site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for erwin DI Business User Portal (BUP), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit http://erwin.com/.

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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.

Contents

Introduction

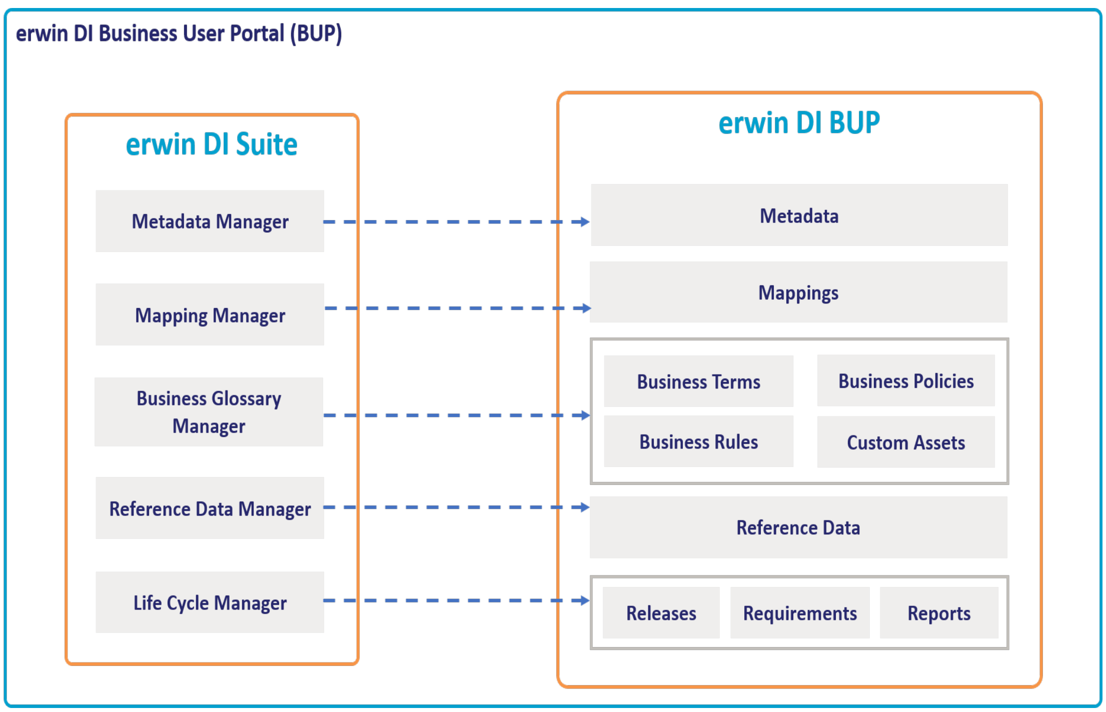
erwin DI Business User Portal (BUP) is a self-service, read-only portal targeted at business users. It provides you with an easy way to access data governance and management information stored in erwin Data Intelligence Suite (DI Suite). It has flexible search and filter mechanisms, which make analysis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

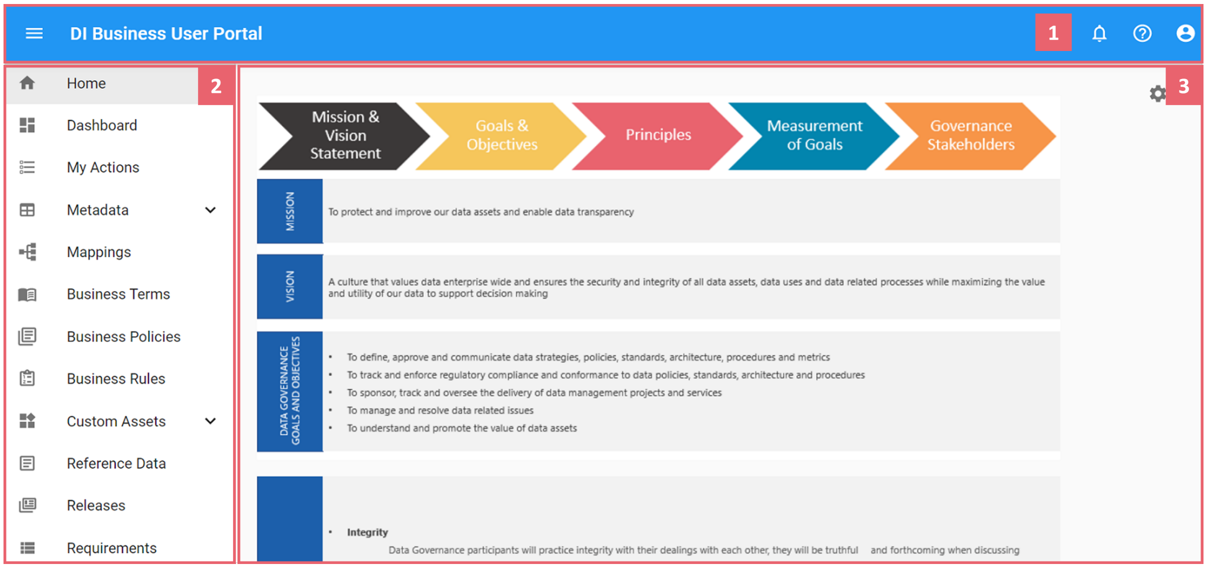
Once you have installed erwin DI BUP, follow these steps to access and use it:

1. Open erwin DI BUP.

   The Login page appears.

2. Enter your credentials.
3. Click **Login**.

After successful log in, the Home page appears by default.



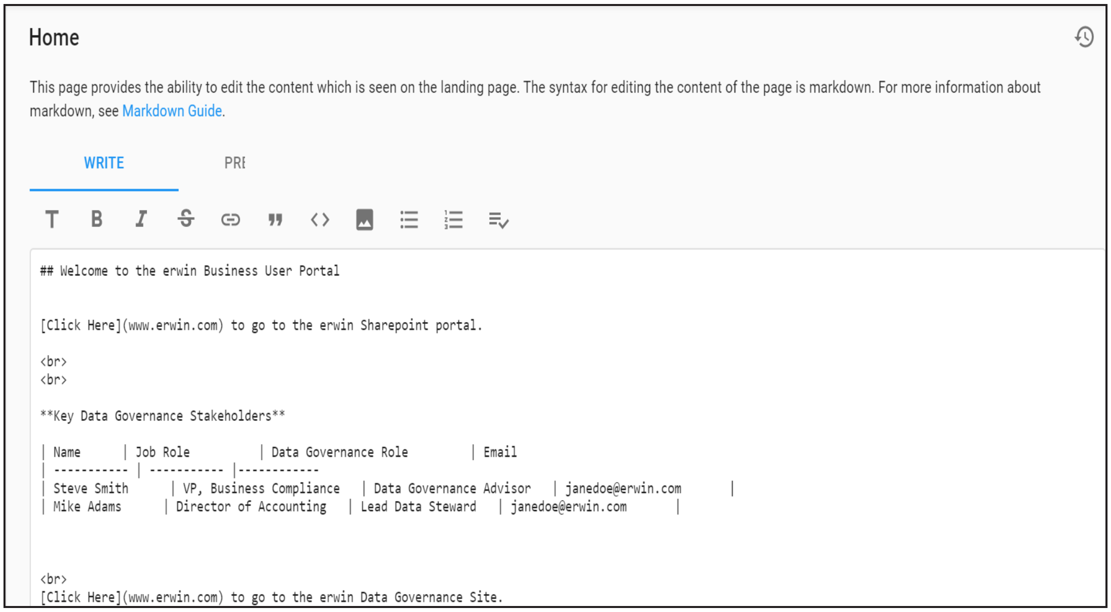
UI Section	Icon	Function
1-Top Pane		**Application Menu**: Click this icon to expand the application menu and access modules.
		Click this icon to use the following options: ▪ **Help**: Access online help ▪ **Feedback**: Access erwin User Community ▪ **About**: View product and license information. You can also update and activate your license here.
		Click this icon to view notifications about application events relevant or assigned to you.
		Click this icon to use the following options: ▪ **Account**: View user accounts and change the password ▪ **Administration**: Manage users and roles ▪ **Logout:** Log out
2-Application Menu		Use this pane to access application modules.
3-Work Area		Based on your selection in the application menu, use this pane to view or work on your data.

Home Page

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

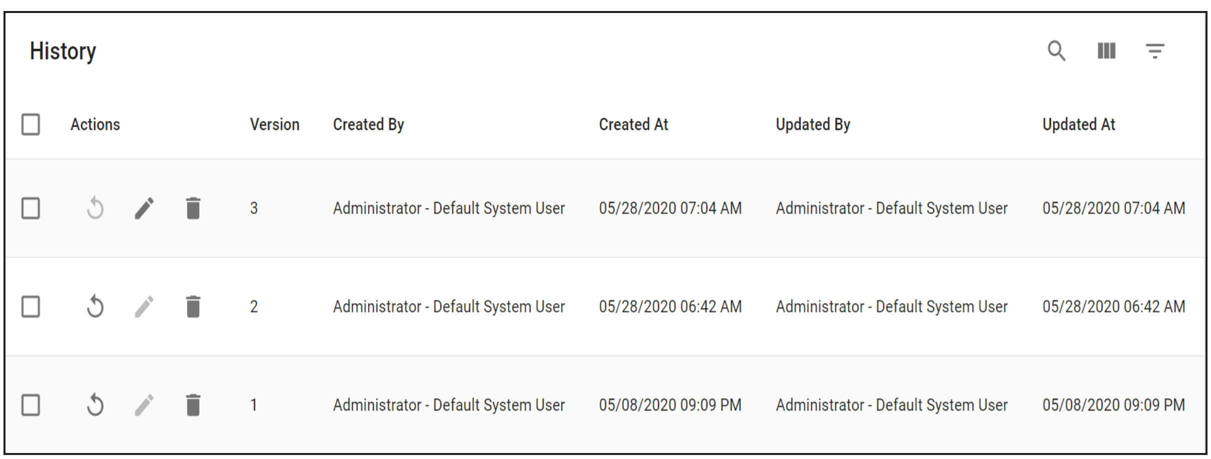
To configure the Home page, follow these steps:

1. Click .



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

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



Use the following options to work on the History:

Search ( )

Use this option to search through history.

View Columns ( )

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

Filter Table ( )

Use this option to filter the required rows based on:

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

Revert ( )

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

Edit ( )

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

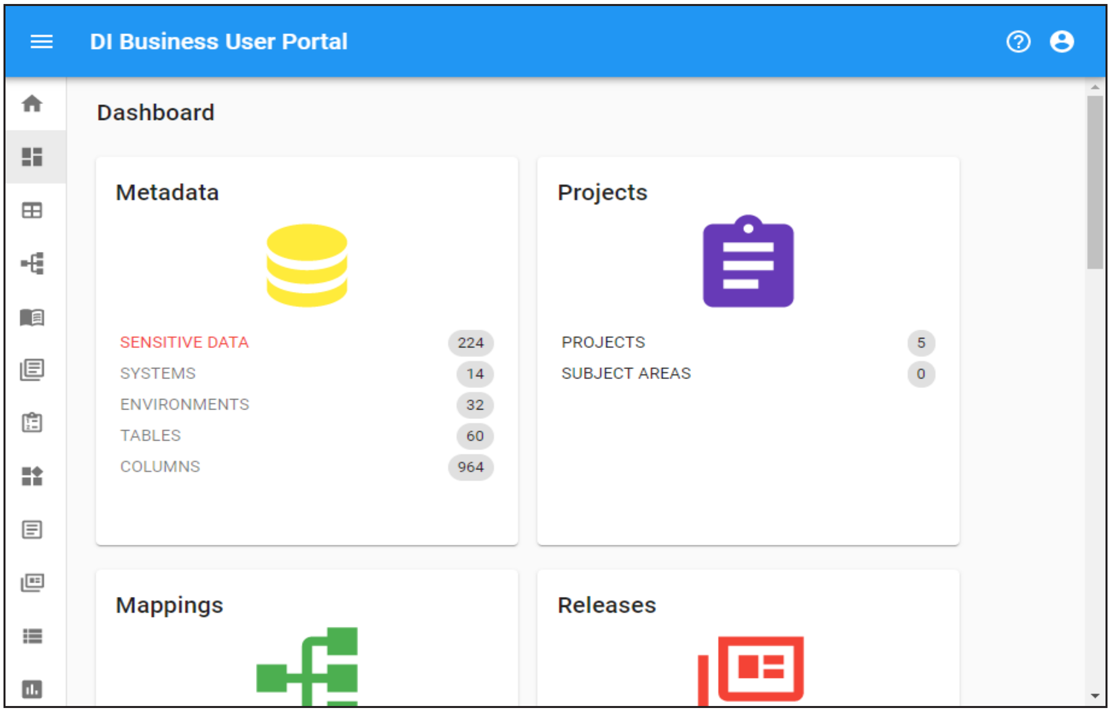
Delete ( )

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

Dashboard

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

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



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

Metadata

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

For more information on viewing metadata, refer to the Metadata section.

Projects

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

For more information on viewing mappings, refer to the Mappings topic.

Mappings

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

For more information on viewing mappings, refer to the Mappings topic.

Releases

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

For more information on viewing releases, refer to the Releases topic.

Codes and Crosswalks

It displays the number of codesets, code values, and code crosswalks. Click the card to view a list and details about reference data.
For more information on viewing reference data, refer to the Reference Data section.

Glossary of Terms

It displays the number of business term catalogs, data stewards, and business terms. Click the card to view a list and details about business terms.
For more information on viewing business terms, refer to the Business Terms section.

Business Policies

It displays the number of business policy catalogs, data stewards, and business policies. Click the card to view a list and details about business policies.
For more information on viewing business policies, refer to the Business Policies section.

Business Rules

It displays the number of business rule catalogs, data stewards, and business rules. Click the card to view a list and details about business rules.
For more information on viewing business rules, refer to the Business Rules section.

Requirements

It displays the number of requirement projects and specification documents. Click the card to view a list and details about requirements.
For more information on accessing requirements, refer to the Requirements topic.

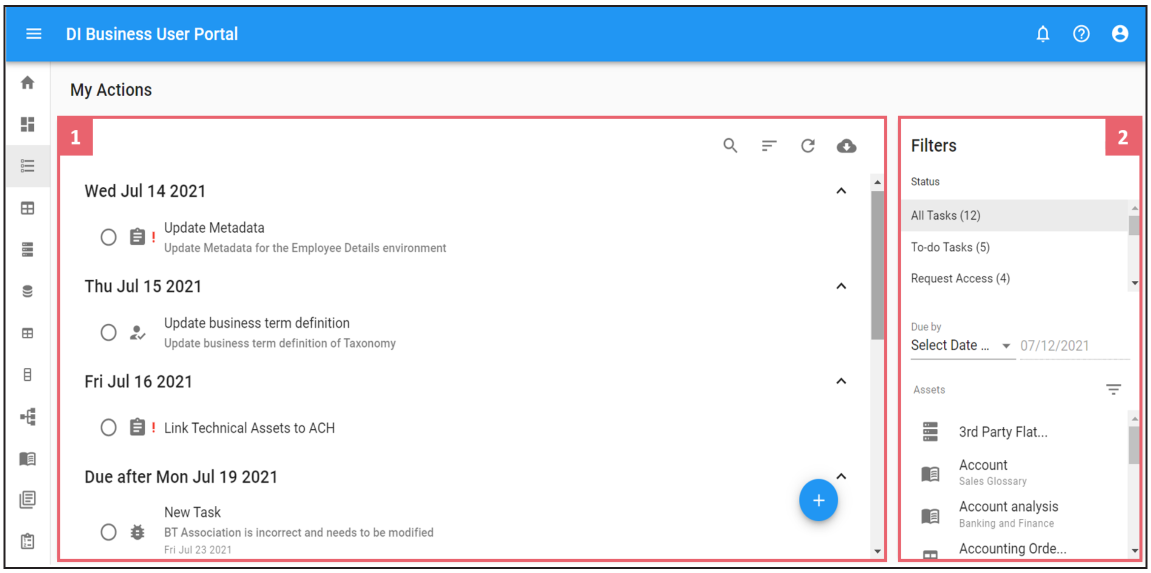
Reports

It displays the number of categories and reports. Click the card to reports in grid and chart form.
For more information on accessing reports, refer to the Reports topic.

My Actions

While collaborating with team members it is necessary to create and assign tasks. In erwin DI Business User Portal (BUP), you can create a list of tasks and assign these tasks to your team members. Team members receive notifications about these tasks and can view them on the My Actions page.

To access the My Actions page, on the application menu, click .



UI Section	Function
1-Task List	Use this section to create and manage tasks. This section displays a list of tasks that are either created by you or assigned to you.
2-Filter	Use this section to filter tasks appearing on the task list.

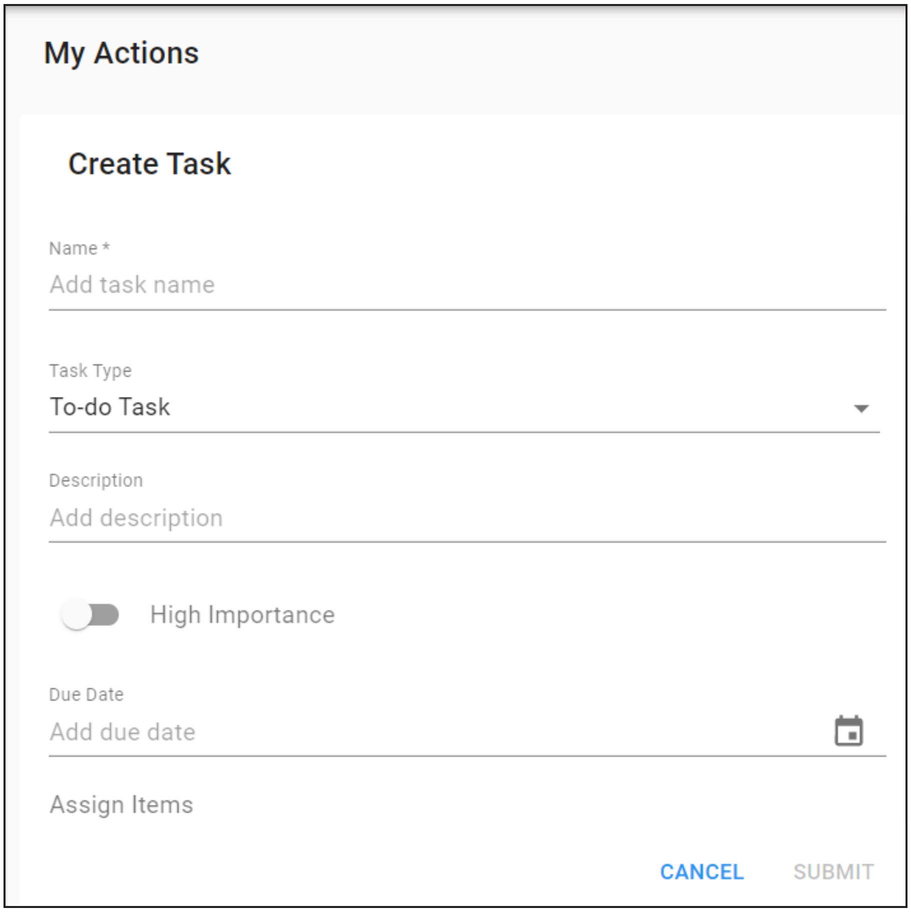
Creating Tasks

To improve productivity and collaboration, you can create tasks related to technical and business assets. These tasks may be to-do tasks, access requests, or issues.

To create tasks, follow these steps:

1. On the **My Actions** page, click .

   The Create Task page appears.

2. 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 a task. For example, Set Sensitive Classification.
Task Type	Specifies the task type. ▪ **To-do Task**: Indicates that the

Filed Name	Description
	task is a to-do task. For example, marking an asset as sensitive. ▪ **Request Access**: Indicates that the task is about getting access to data. For example, getting access to a table in an environment. ▪ **Issue**: Indicates that the task is about logging an issue. For example, Association of a business term is incorrect and needs to be modified.
Description	Specifies the description of a task. For example: Mark this asset as sensitive and classify as PII.
High Importance	Specifies whether the task is of high importance.
Due Date	Specifies the due date of the task.
Asset Type	Specifies the asset type of the asset related to the task.
System	Specifies the system related to the task. This field is available only when Asset Type is set to Systems, Environments, Tables, or Columns.
Environment	Specifies the environment related to the task. This field is available only when Asset Type is set to Environments, Tables, or Columns.
Table	Specifies the table related to the

Filed Name	Description
	task. This field is available only when Asset Type is set to Tables or Columns.
Column	Specifies the column related to the task. This field is available only when Asset Type is set to Columns.
Catalog	Specifies the catalog of a business asset. This field is available only when Asset Type is set to Business Terms, Business Rules, Business Policies, or Custom Asset.
Business Term	Specifies the business term related to the task. This field is available only when Asset Type is set to Business Terms.
Business Rule	Specifies the business rule related to the task. This field is available only when Asset Type is set to Business Rules.
Business Policy	Specifies the business policy related to the task. This field is available only when Asset Type is set to Business Policies.
Custom Asset Type	Specifies the custom asset type related to the task. This field is available only when Asset Type is set to Custom Asset.
Custom Asset	Specifies the custom asset related to the task. This field is available only when Asset Type is set to Custom Asset.

Filed Name	Description
User Type	Specifies the user type assigned to the task. ▪ **Users Assigned to Assets**: Indicates that the user is an erwin DI BUP user assigned to this asset ▪ **Business Users**: Indicates that the user is an erwin DI BUP user. ▪ **Data Intelligence Suit Users**: Indicates that the user is an erwin DI Suite user ▪ **External Users**: Indicates that the user is an external user and not present in erwin DI BUP or erwin DI Suite applications
Select Users	Specifies the users assigned to the task.
Email	Specifies the email ID of the external user. This field is available only when User Type is set to External Users. For example, chris.harris@quest.com
Filter assigned users ( )	Use this option to filter the list of assigned users. If you have added multiple users for a task, you can search and update the list of users.

3. Click **Submit**.

   The task is created and added to the task list. The users assigned to the task receive notifications about the task.

On the **My Actions** page, use the following options to work on the task list:

Search ( )

Use this option to search a task in the task list.

Sort By ( )

Use this option to sort the task list alphabetically based on due date or task type.

Refresh ( )

Use this option to refresh the task list.

Export as Excel ( )

Use this option to export the task list in the XLSX format.

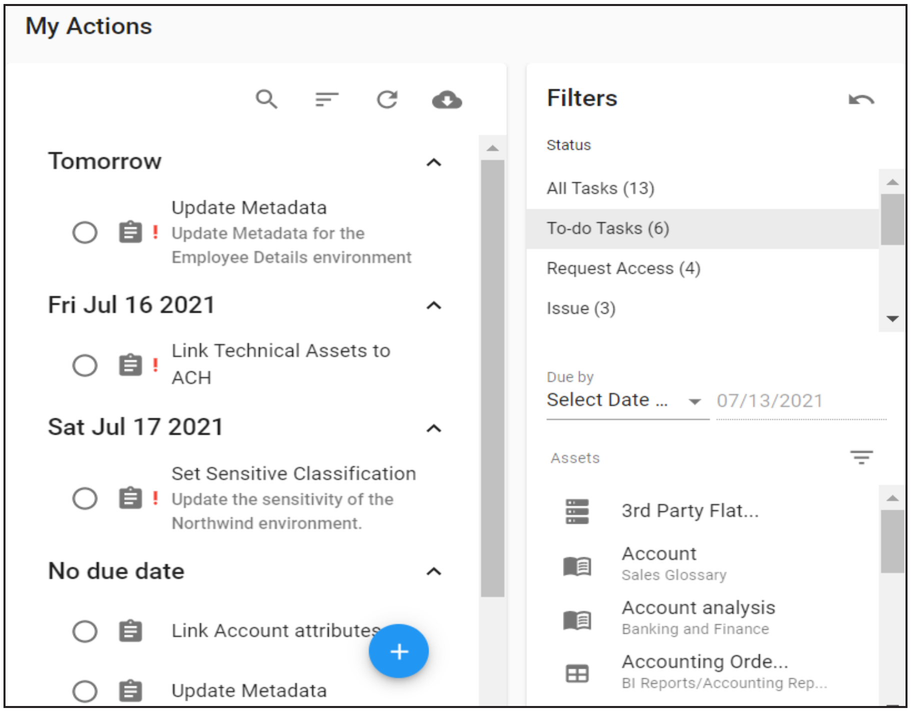
Filters

To filter tasks from the task list, in the **Filters** section, use the following options:

Status

By default, a task list displays all the tasks. Use this option to filter tasks based on task status.

For example, in the following image, a task list displays only to-do tasks.



Due by

Use this option to filter tasks based on a date and the following date operators:

is before

Use this date operator to filter tasks that are due before the selected date.

is after

Use this date operator to filter tasks that are due after the selected date.

is in same year as

Use this date operator to filter tasks that are due in the same year as that of the selected date.

is in same month as

Use this date operator to filter tasks that are due in the same month as that of the selected date.

is same date as

Use this date operator to filter tasks that are due on the selected date.

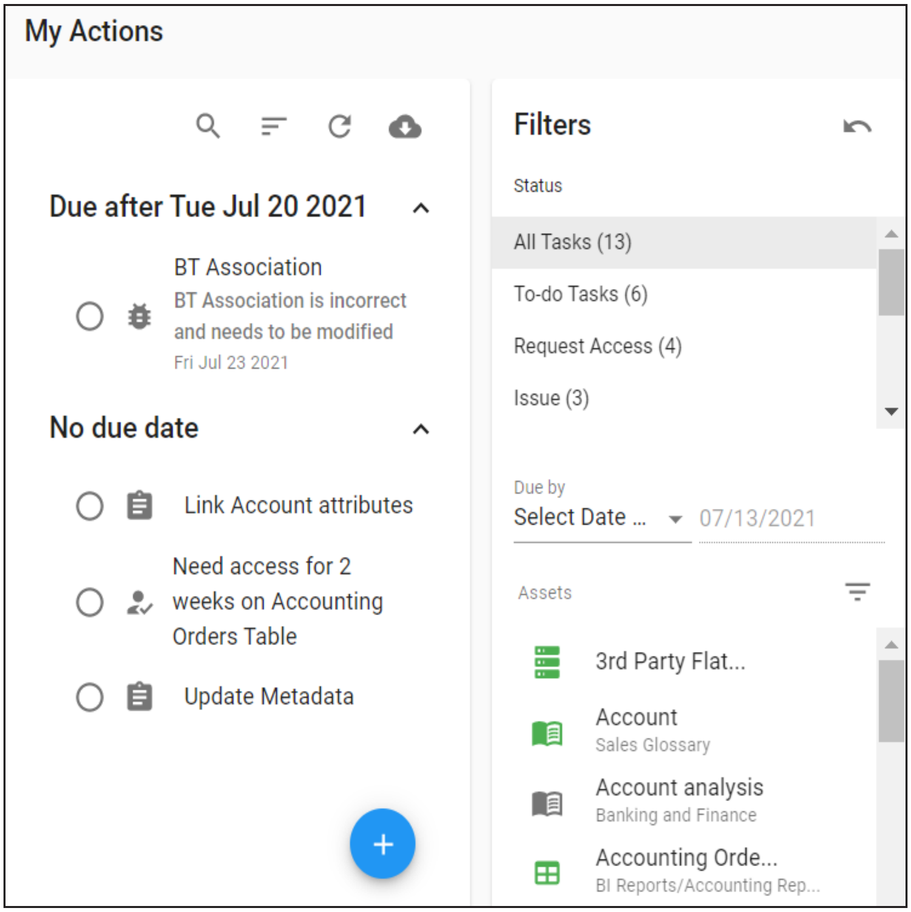
To set a date, select a date operator, and then click the date field. The calendar opens.

Select a date and click **OK**.

Assets

Use this option to filter tasks based on assets. To filter tasks based on assets, click the required asset's icon.

For example, in the following image, a task list displays tasks related to 3rd Party Flat Files, Account, and Accounting Orders By Year.



To filter the required asset in the asset list, click and enter asset name.

You can also manage tasks on the My Actions page. Managing tasks involves:

- Marking tasks complete
- Deleting tasks
- Editing tasks
- Adding comments
- Restoring completed tasks

Managing Tasks

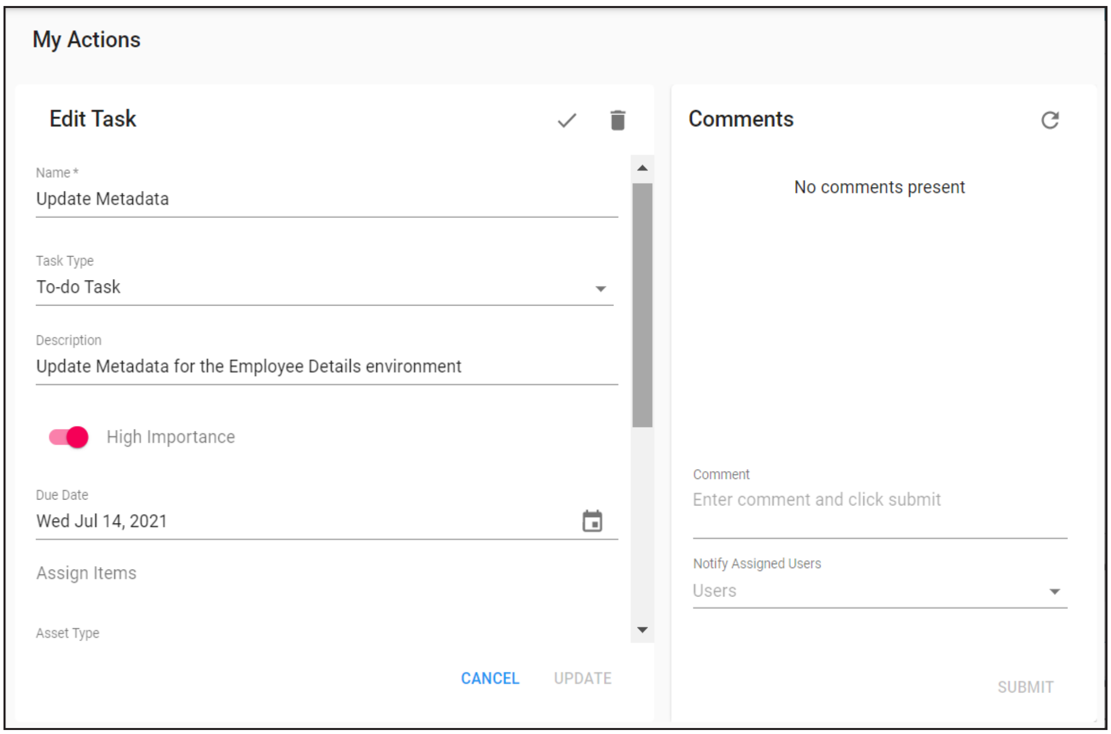
Managing tasks involves:

- Marking tasks complete
- Deleting tasks
- Editing tasks
- Adding comments
- Restoring completed tasks

To manage tasks, follow these steps:

1. On the **My Actions** page, click a task.

   The Edit Task section appears.

2. Use the following options:

   Complete Task ()

   Use this option to mark a task complete.

   Delete ()

   Use this option to delete a task.

To edit a task, enter the required fields on the fly and click **Update**.

> You can delete or edit a task only if you have created the task.

Adding Comments

To enter mention comments or notes about a task, in the **Comments** section, use the following options:

Comment

Use this option to enter comments about the task.

For example, Metadata scan is scheduled on 14 July 2021.

Notify Assigned User

Use this option to notify other assigned users about the comment.

Notify Task Creator

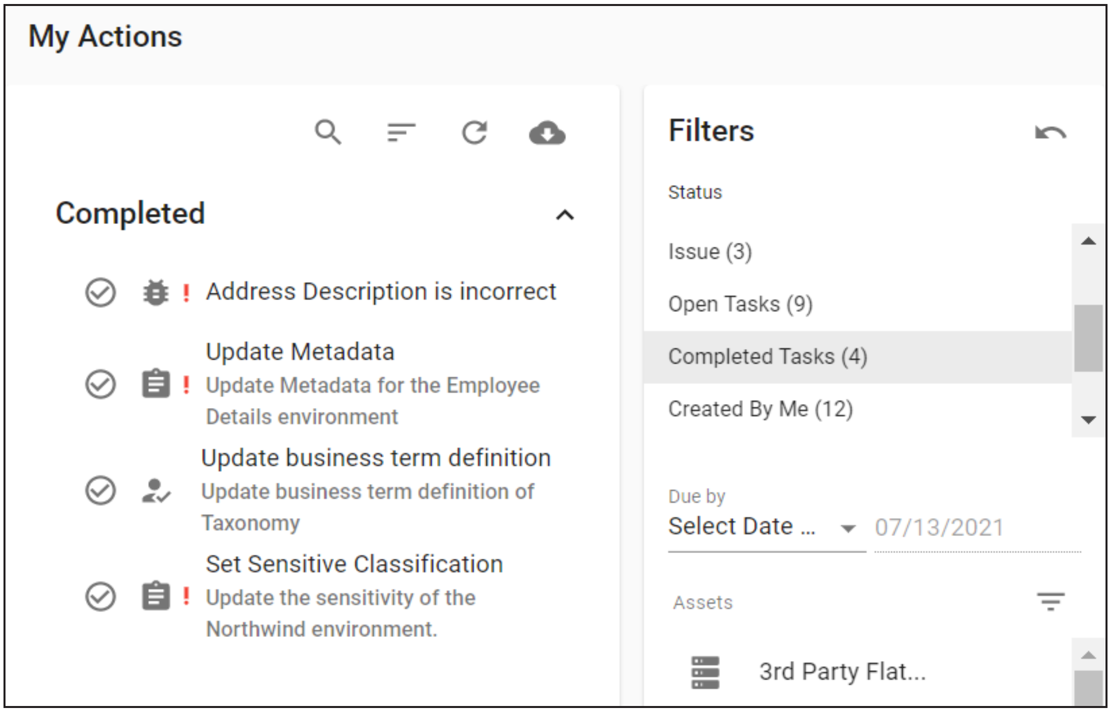
Use this option to notify the task creator about the comment. This option is available for tasks that are not created by you.

Restoring Completed Tasks

To restore tasks, follow these steps:

1. On the **My Actions** page, in the **Filters** section, click **Completed Tasks**.

   The list of completed tasks appear.



2. Click .

The task is restored.

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, user accounts, viewing reports and managing security.

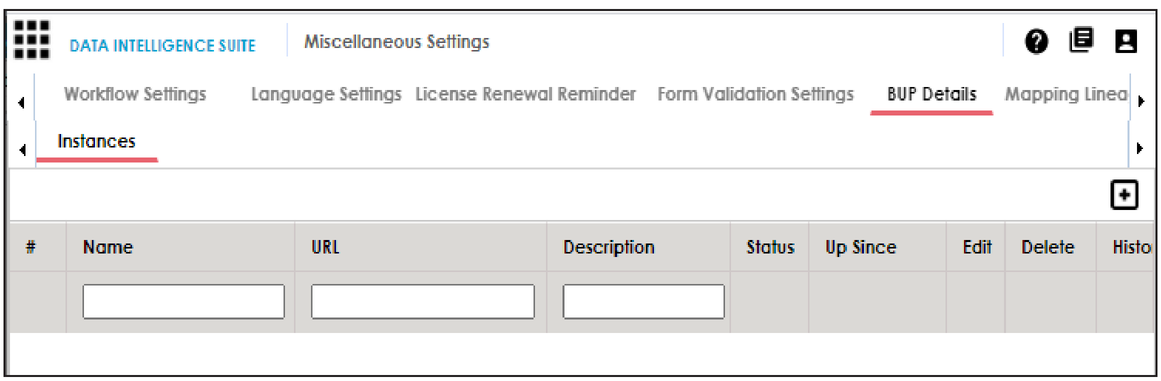
Configuring erwin DI BUP

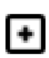
Before you can use your erwin Data Intelligence Suite (DI Suite) data in erwin DI Business User Portal (BUP), you need to configure it in erwin DI Suite.

To configure erwin DI BUP , follow these steps:

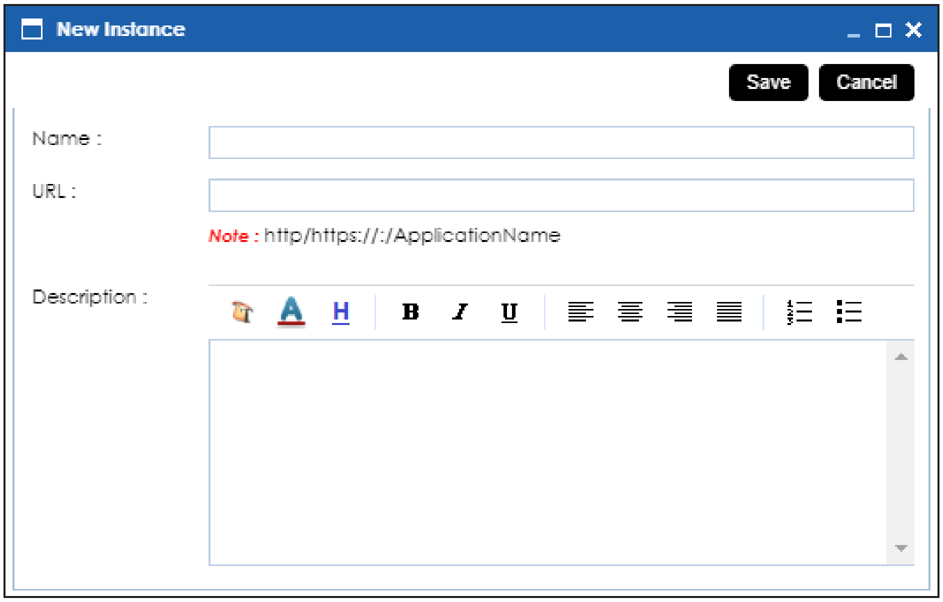
1. In erwin DI Suite, go to **Application menu** > **Miscellaneous** > **Settings** > **Miscellaneous** > **BUP Details**.

   The following page appears.

2. Click .

   The New Instance page appears.



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

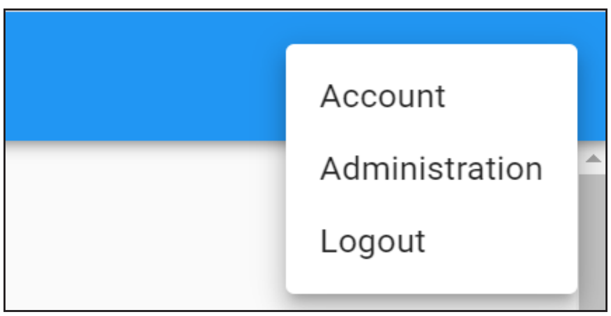
Roles

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:

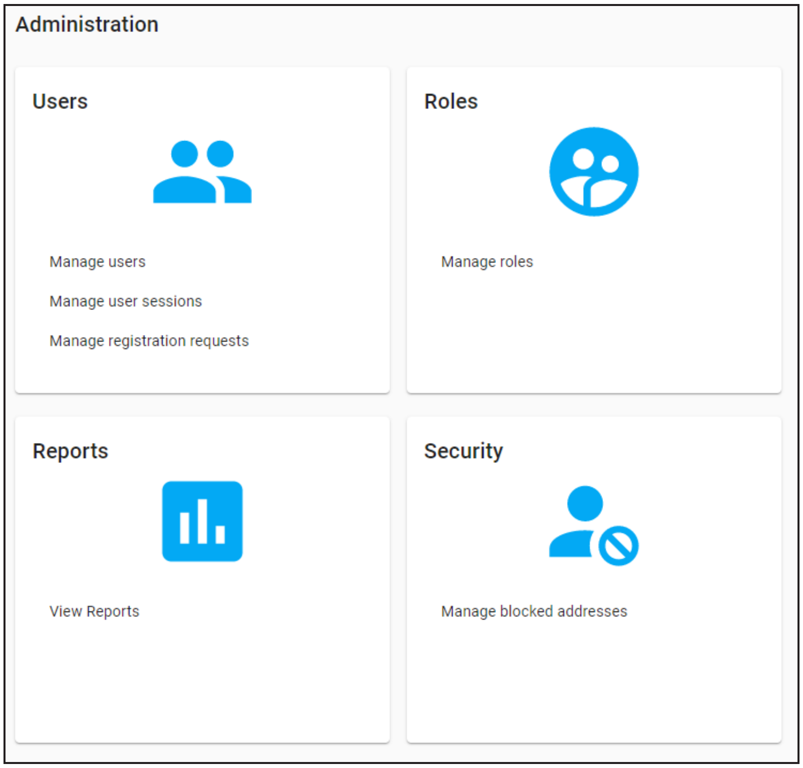
1. In the top pane, click .

   The following options appear.

2. Click **Administration**.

   The Administration page appears.

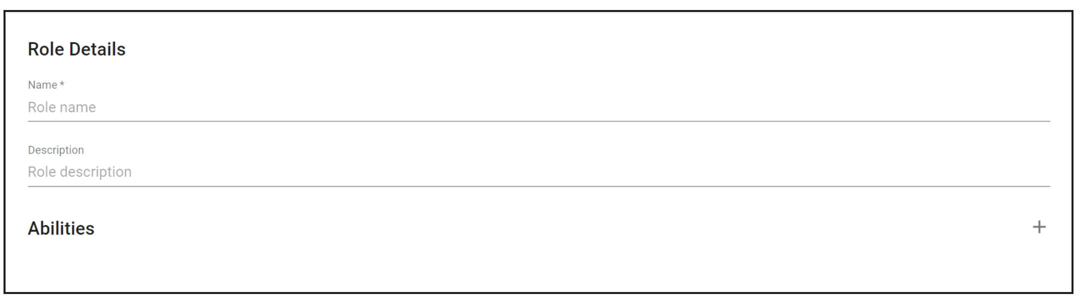


3. Under the **Roles section**, click **Manage roles**.

   The Roles page appears.

4. Click +.

   The Role Details page appears.

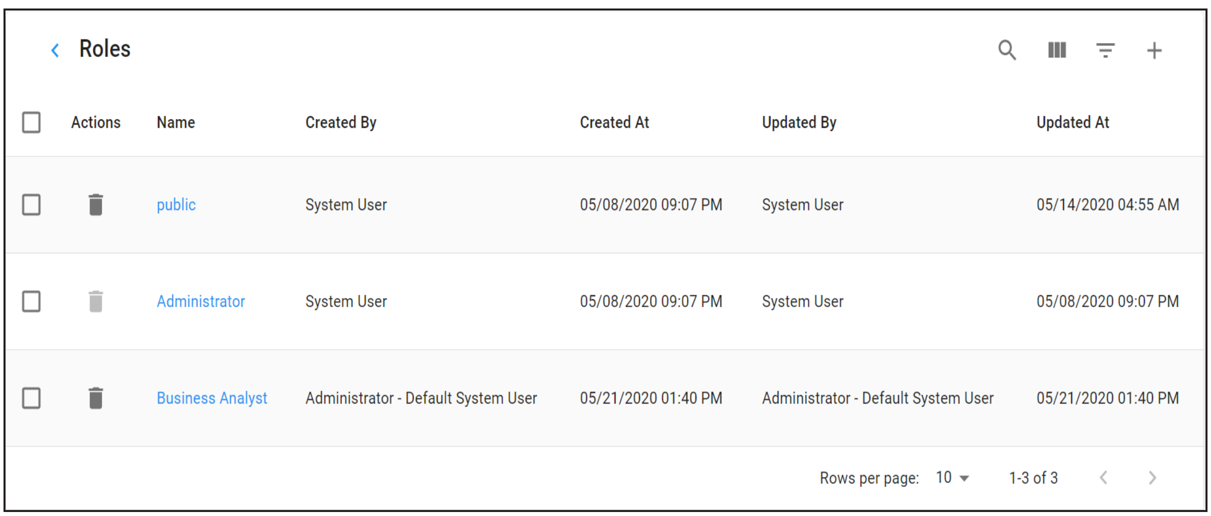


5. Enter or select appropriate values in the fields. Fields marked with a asterisk (*) are mandatory. Refer to the following table for field descriptions:

Field Name	Description
Role Details	▪ **Name**: Specifies the name of the role. For example, Business Analyst. ▪ **Description**: Specifies the description of the role. For example: This role manages business terms, business policies, business rules, and custom assets.
Abilities	Specifies the modules assigned to the role. For example, Business Rules. Click and then, click to select abilities. You can add multiple abilities. 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. For example, Data Catalog has additional Create and Update rights. You can choose to use both, one, or none.

6. Click **Save**.

   The role is saved and added to the Roles list.



Once roles are created, you can manage roles. Managing roles involves:

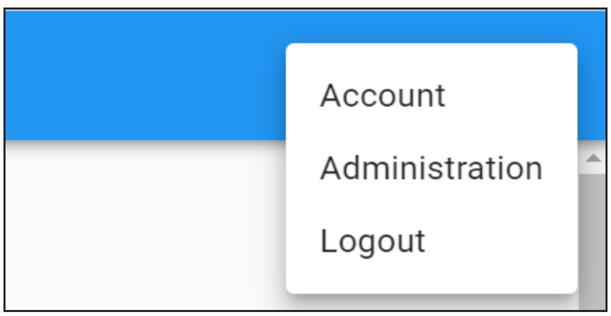
- Updating roles
- Deleting roles

Managing Roles

Managing roles involves:

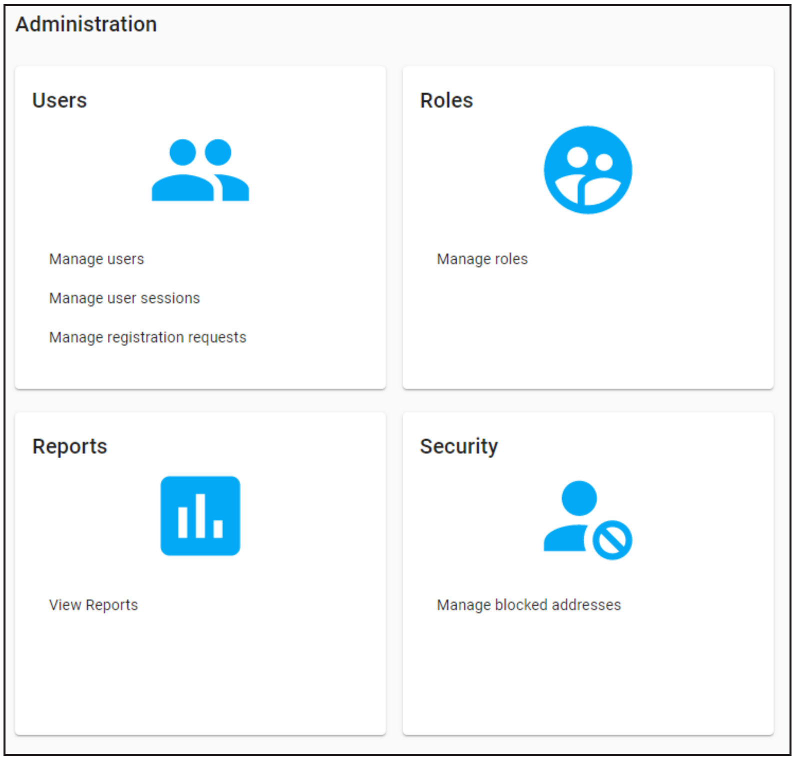
- Deleting roles
- Updating roles

To manage roles, follow these steps:

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

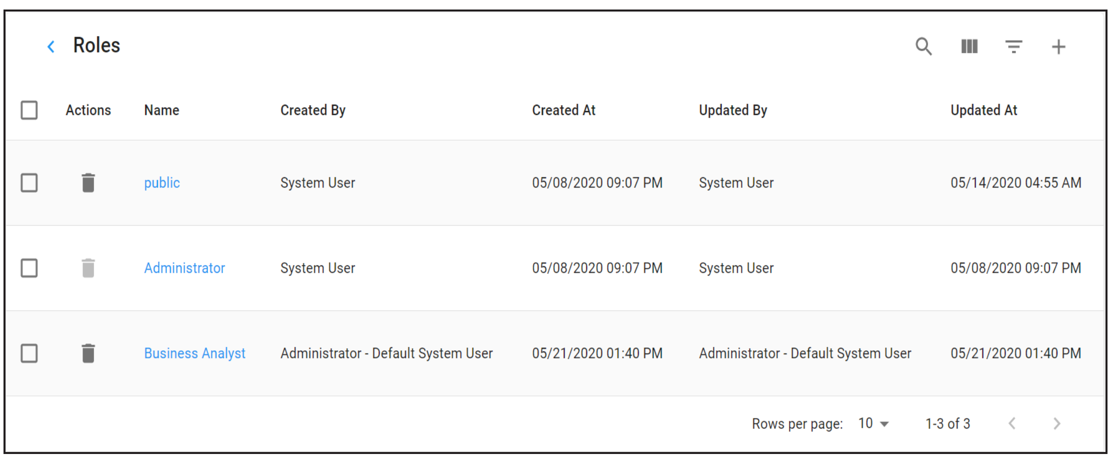
2. Click **Administration**.

   The Administration page appears.



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

   The Roles page appears. It displays all the available roles.



	Actions	Name	Created By	Created At	Updated By	Updated At
		public	System User	05/08/2020 09:07 PM	System User	05/14/2020 04:55 AM
		Administrator	System User	05/08/2020 09:07 PM	System User	05/08/2020 09:07 PM
		Business Analyst	Administrator - Default System User	05/21/2020 01:40 PM	Administrator - Default System User	05/21/2020 01:40 PM

4. Click the required role.

   The Role Details page appears.

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

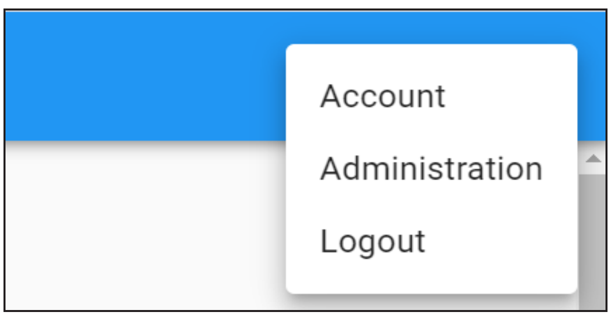
Adding Users

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:

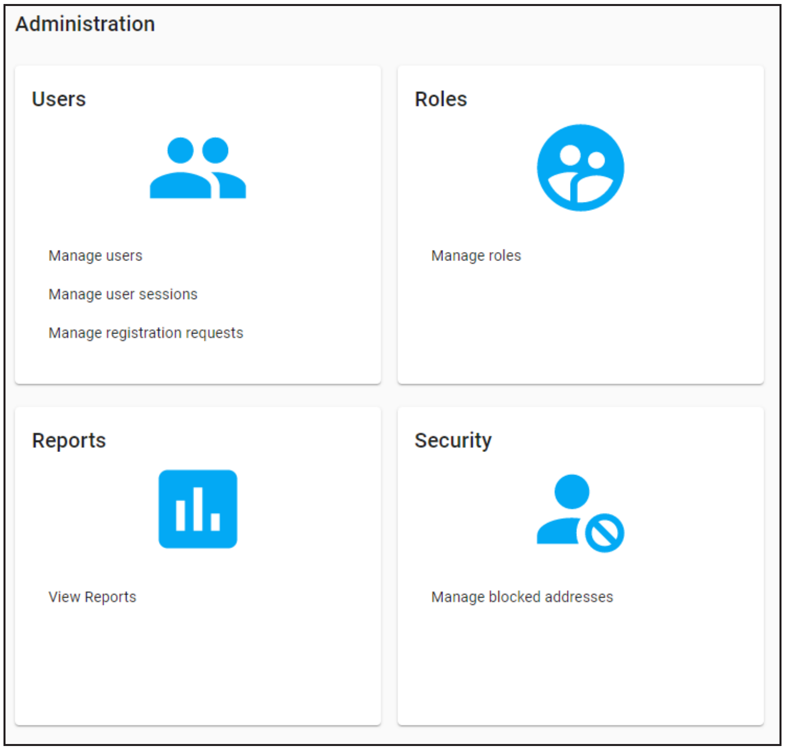
1. In the top pane, click .

   The following options appear.

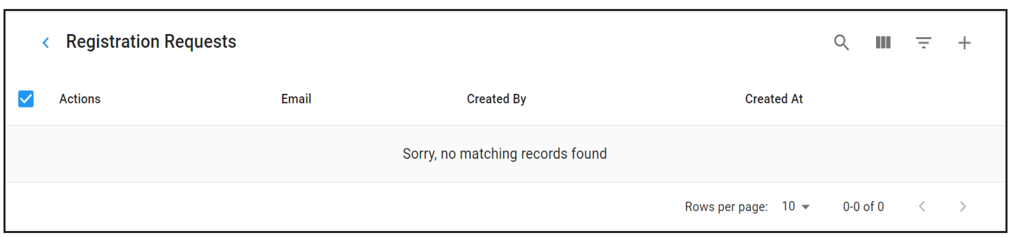
2. Click **Administration**.

   The Administration page appears.



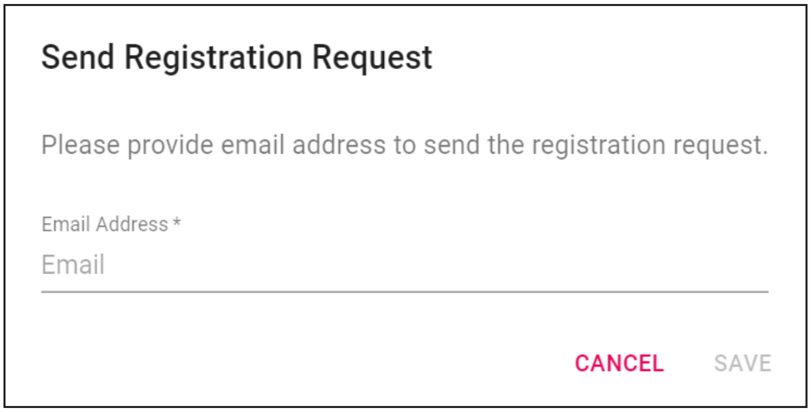
3. Under the **Users** section, click **Manage Registration Requests**.

   The Registration Requests page appears.



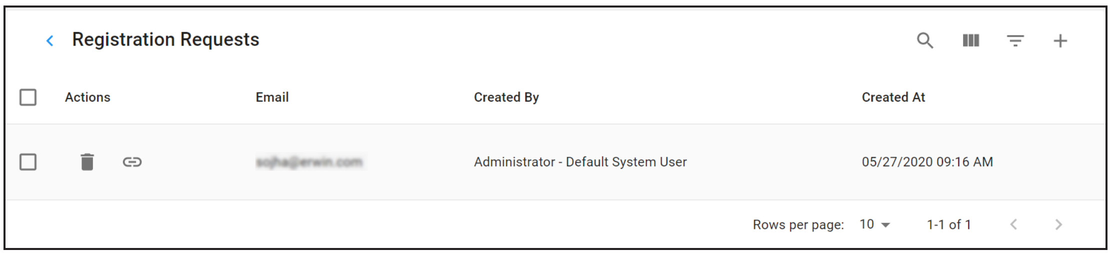
4. Click +.

   The Send Registration Request page appears.



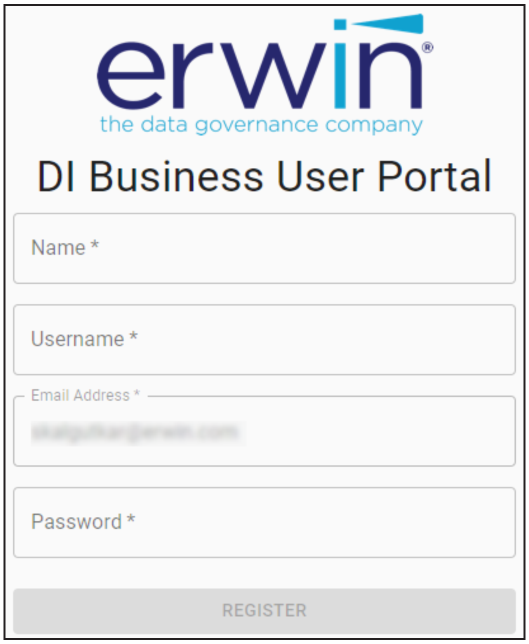
5. Enter an **Email Address** and click **Save**.

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



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

1. Click to open the registration form.



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

Use the following options to work on registration requests:

Search ( )

Use this option to search the registration requests.

View Columns ( )

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

Filter Table ( )

Use this option to filter rows based on:

- Email
- Created By
- Created At

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

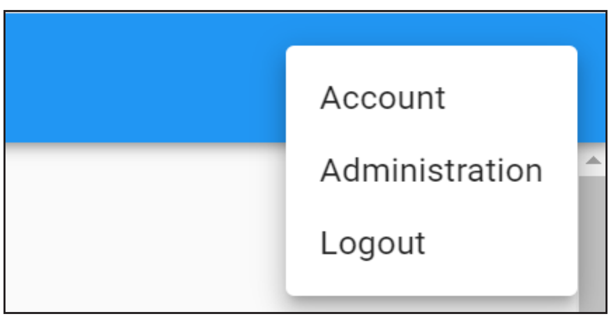
Managing users involves:

- 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.

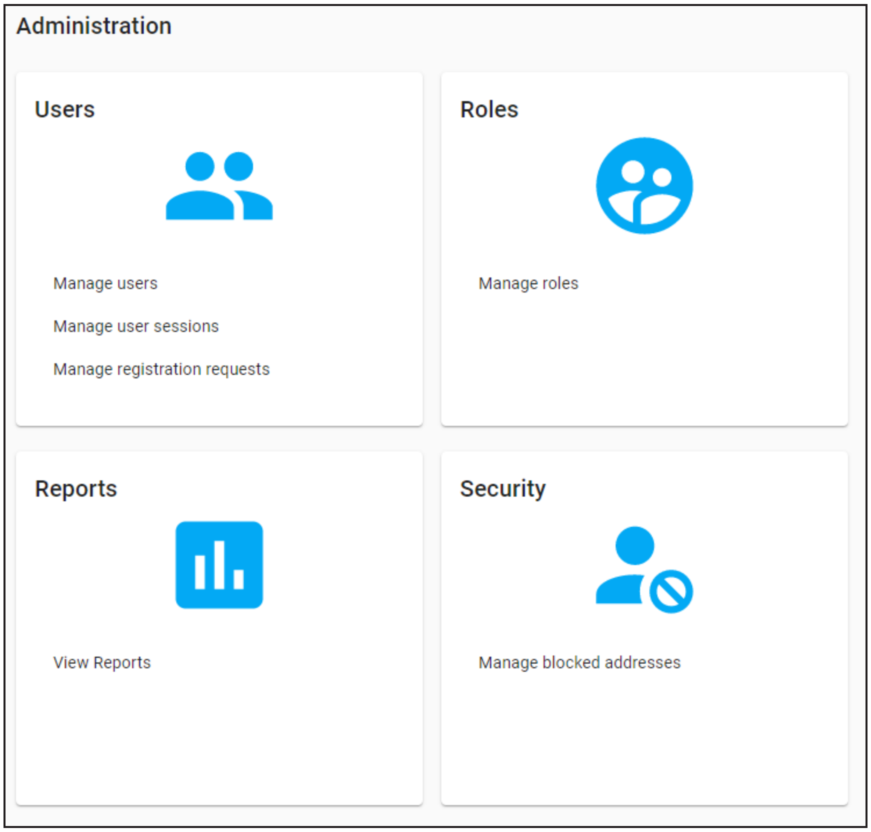
To manage users, follow these steps:

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

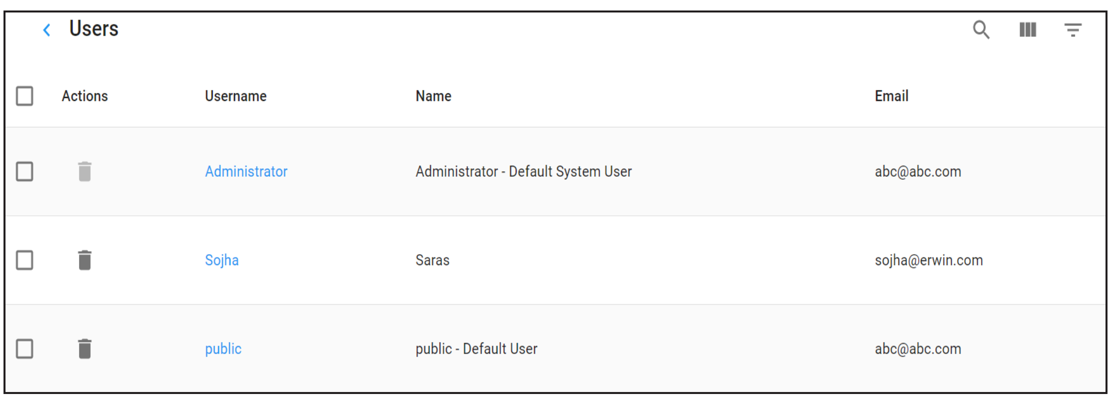
2. Click **Administration**.

   The Administration page appears.



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

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

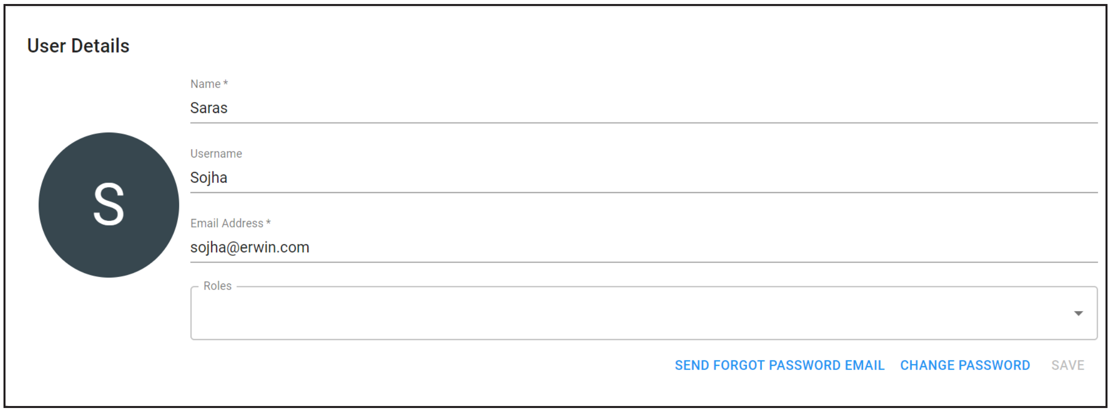


Users

	Actions	Username	Name	Email
		Administrator	Administrator - Default System User	abc@abc.com
		Sojha	Saras	sojha@erwin.com
		public	public - Default User	abc@abc.com

4. Click the required user.

   The User Details page appears.



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:

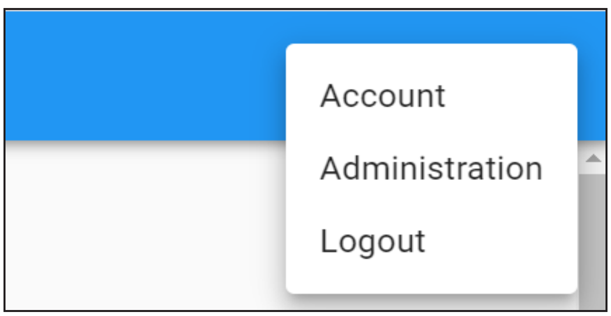
- Username
- Name
- Email

Managing User Sessions

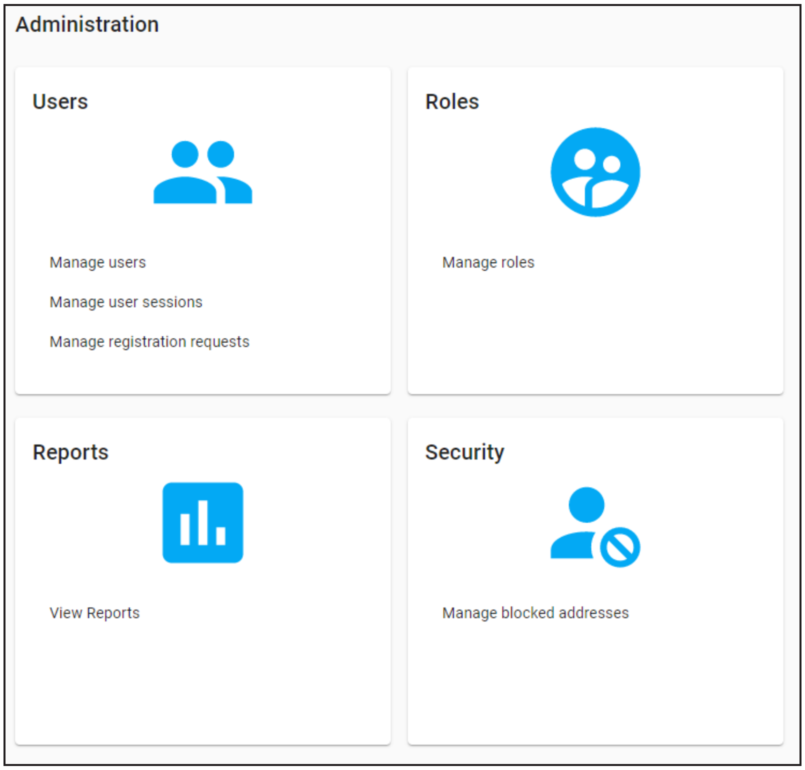
You can manage user sessions and end them based on your requirements.

To manage user sessions, follow these steps:

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

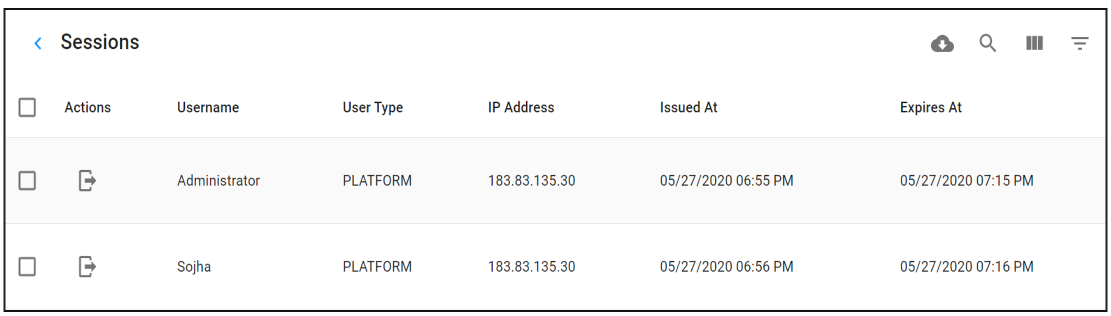
   

2. Click **Administration**.
   The Administration page appears.



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

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



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

   The selected sessions are terminated.

Viewing Reports

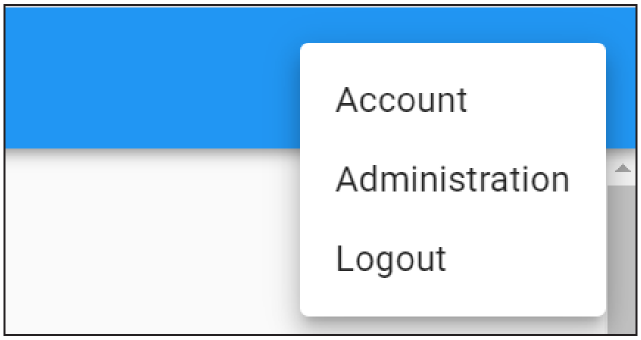
To understand which roles or users in your organization have access to which data, you can view asset assignment reports for business assets, datastores, tags, KPIs, business processes, recovery policies, strategic assets, and more. You can configure these reports to display the list of roles or users to which assets are assigned. The following asset assignment reports are available.

- Business Term Catalogs
- Business Rule Catalogs
- Business Policy Catalogs
- Datastores Catalogs
- TAGS Catalogs
- KPIs Catalogs
- Business Processes Catalogs
- Recovery Policies Catalogs
- Strategic Assets Catalogs
- Systems
- Environments
- Mapping Projects
- Mapping Subject Areas

To view asset assignment reports, follow these steps:

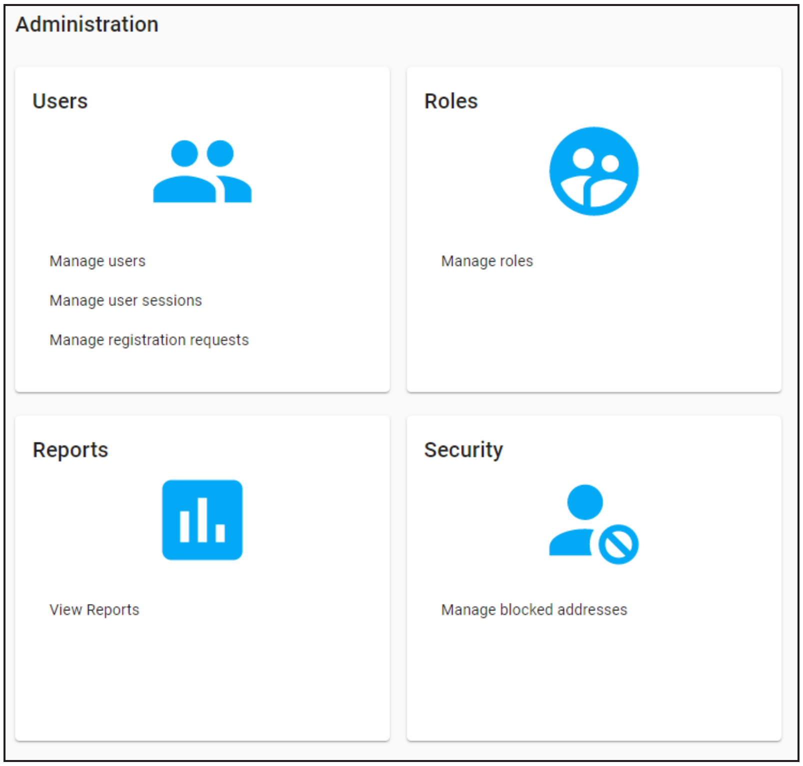
1. In the top pane, click .

   The following options appear.



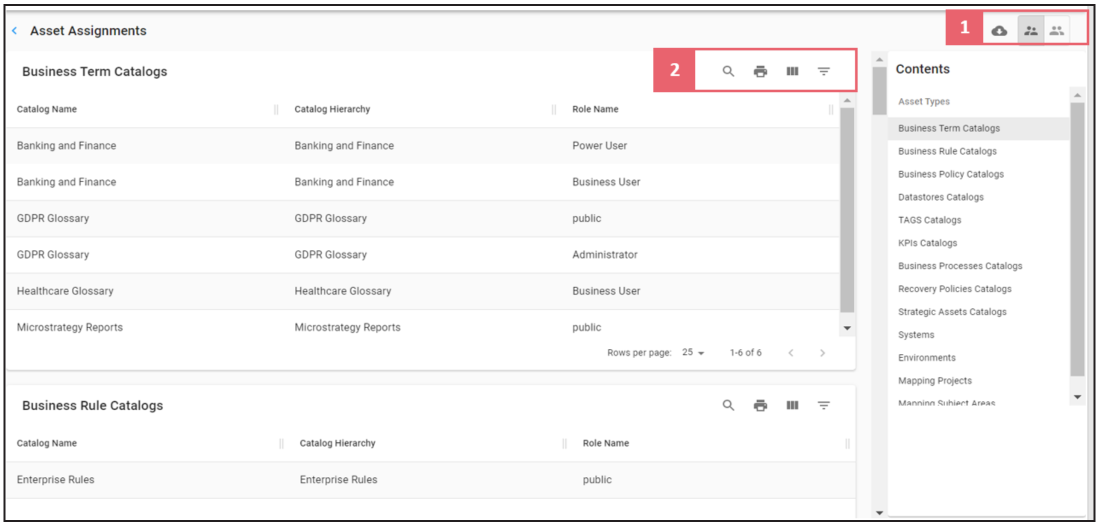
2. Click **Administration**.

   The Administration page appears.



3. Under the **Reports** section, click **View reports**.
4. Under **Report Type**, click **Asset Assignment**.

The Asset Assignments page appears. It displays asset type-wise reports of hierarchy and role or user assignments. You can scroll through the available reports or click a section in the Contents pane.



Refer to the following table for descriptions of options under **1**-Role/User Switch and Export and **2**-Filter and Export for Assets sections.

UI Section	Icon	Function
1-Role/User Switch and Export		**Export as Excel**: Use this option to download a report in the XLSX format.
		Use this option to switch between report by roles and users. By default, roles is selected. If you switch to users, User's Name and Username columns appear in the report.
2-Filter and Export for Asset		**Search**: Use this option to search the required catalog, hierarchy, system, environment, project, subject area, and roles or users.
		Print: Use this option to print the report of a specific asset
		View Columns: Use this option to select the columns that you want to show in the grid. By default, all columns are selected.

UI Section	Icon	Function
		Filter Table: Use this option to filter the information available in reports. The filter options available depend on the asset type.

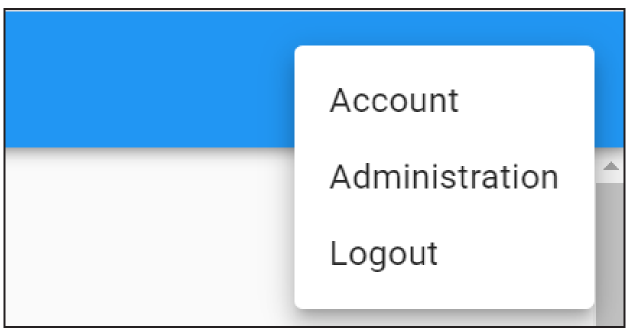
Managing Security

Access management helps protect applications and data. You can safeguard your erwin DI Business User Portal (BUP) application and data by triggering a user and IP address lockout in case of multiple failed login attempts. Once a user and IP address is blocked, administrators can view the IP address and decide the next steps with respect to securing the application. Only an administrator can unblock IP addresses and grant them access.

To manage security, follow these steps:

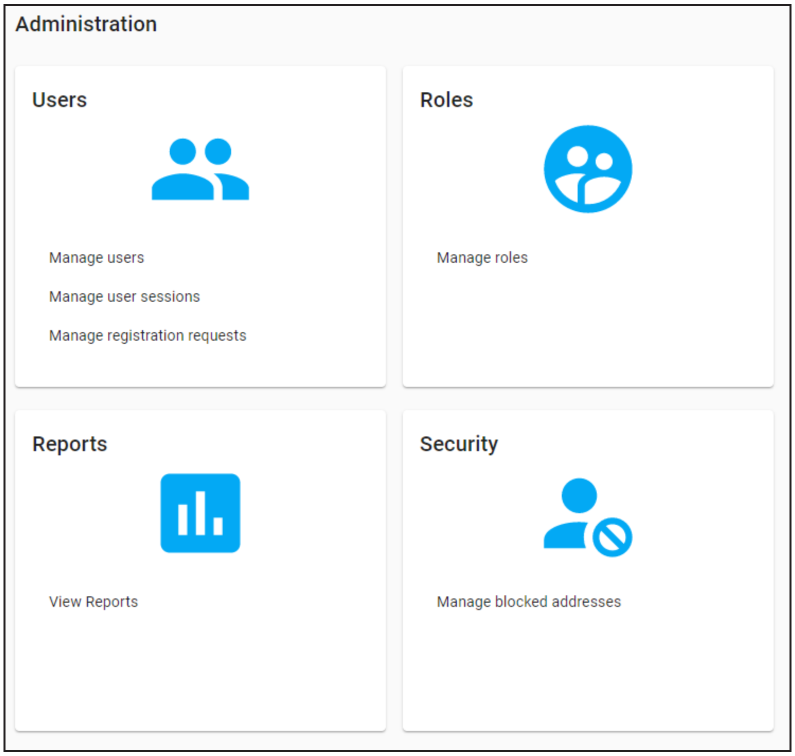
1. In the top pane, click .

   The following options appear.

2. Click **Administration**.

   The Administration page appears.



3. Under the **Security** section, click **Manage blocked addresses**.
   The Security page appears. It displays a list of blocked IP addresses and the timestamp at which the application access expired.

4. To unbock an IP address or user, in the required row, under the **Actions** column, click .
   The IP address is removed from the list of blocked IP addresses and its application access is restored.

Use the following options to work on blocked addresses:

Search (🔍)

Use this option to search the blocked address.

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:

- IP: Use this option to filter blocked addresses based on IP Address.
- Date Operator: Use this option to filter blocked addresses based on a date and the following date operators:

is before

Use this date operator to filter blocked addresses that are expired before the selected date.

is after

Use this date operator to filter blocked addresses that are expired after the selected date.

is in same year as

Use this date operator to filter blocked addresses that are expired in the same year as that of the selected date.

is in same month as

Use this date operator to filter blocked addresses that are expired in the same month as that of the selected date.

is in same date as

Use this date operator to filter blocked addresses that are expired on the selected date.

is in same hour as

Use this date operator to filter blocked addresses that are expired on the selected hour.

is in same minute as

Use this date operator to filter blocked addresses that are expired on the selected minute.

To set a date, select a date operator, and then click the date field. The calendar opens. Select a date and click **OK**.

Quick Start

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

As an administrator, you start with on-boarding users.

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

- Metadata
- Mappings
- Business Terms
- Reference Data
- Releases
- Requirements
- Reports

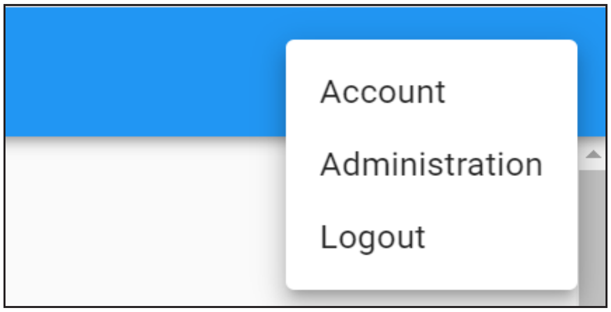
On-boarding Users

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

To create registration requests, follow these steps:

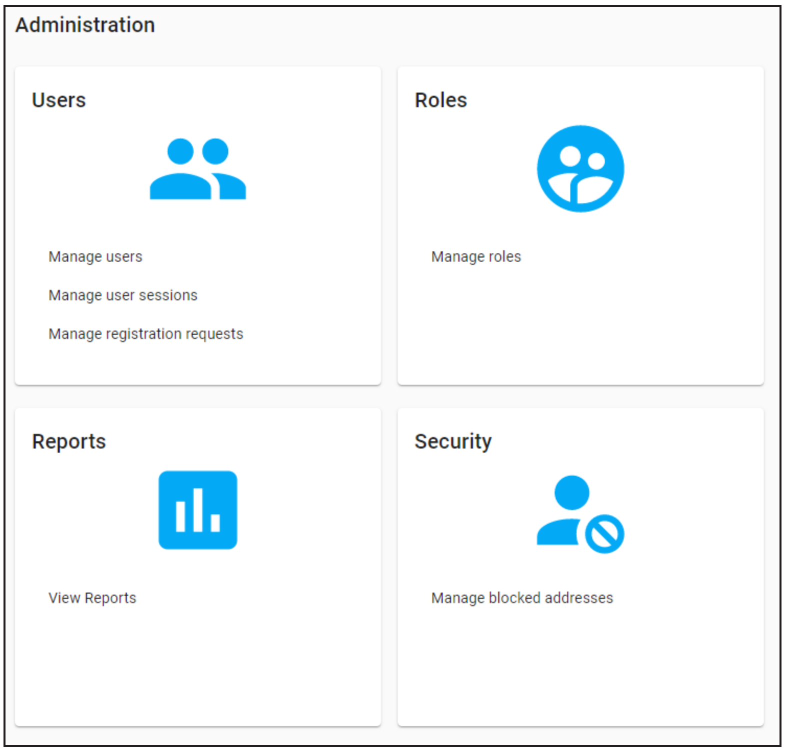
1. In the top pane, click .

   The following options appear.



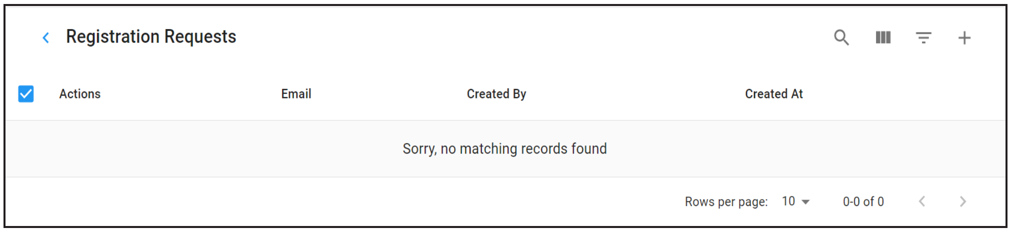
2. Click **Administration**.

   The Administration page appears.



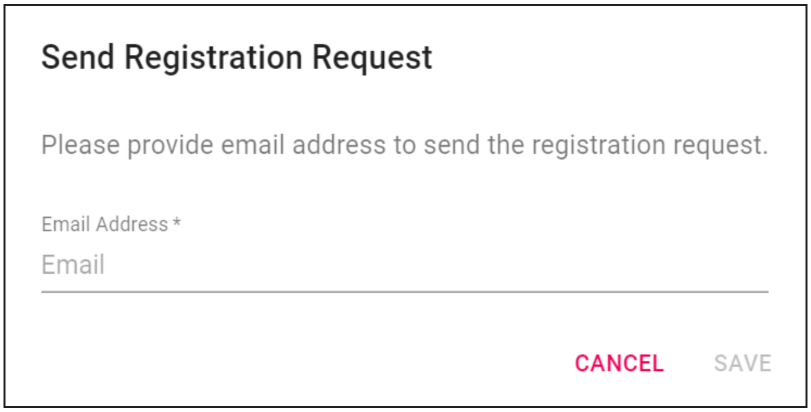
3. Under the **Users** section, click **Manage Registration Requests**.

   The Registration Requests page appears.



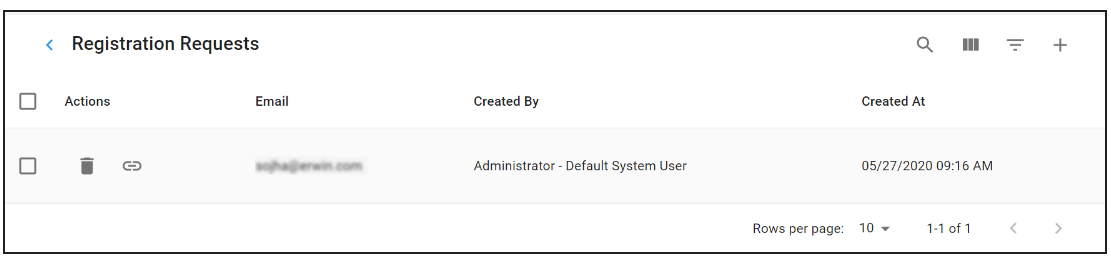
4. Click +.

   The Send Registration Request page appears.



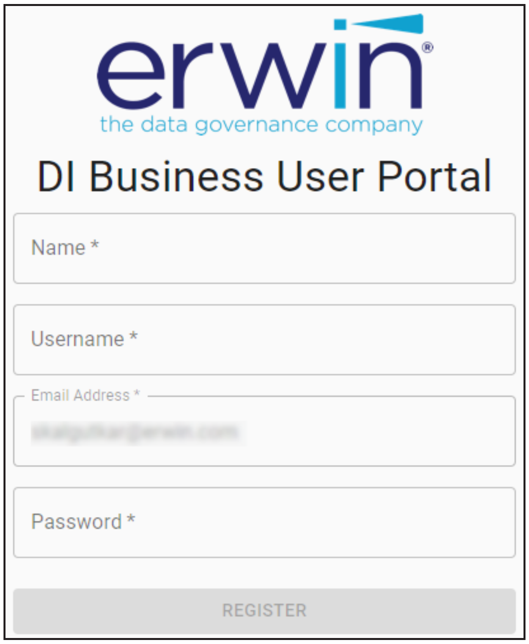
5. Enter an **Email Address** and click **Save**.

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



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

1. Click to open the registration form.



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

Use the following options to work on registration requests:

Search ()

Use this option to search the registration requests.

View Columns ()

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

Filter Table ()

Use this option to filter rows based on:

- Email
- Created By
- Created At

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

Metadata

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

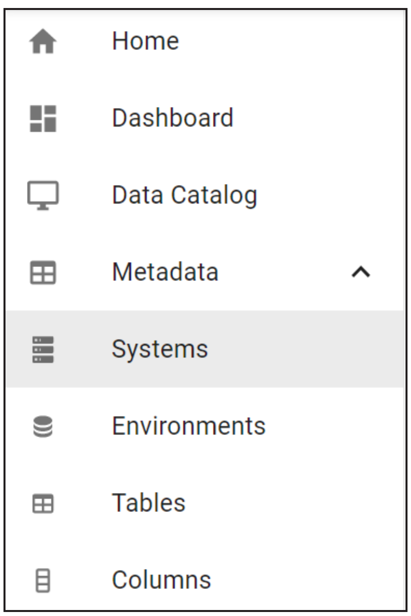
Systems

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

To access the Systems grid follow these steps:

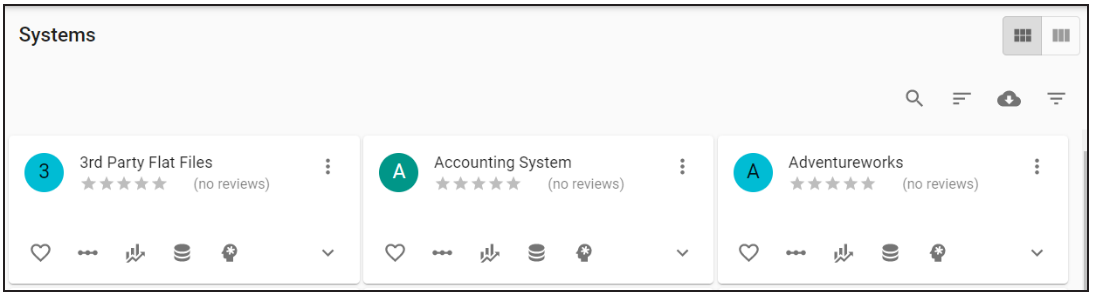
1. On the application menu, click **Metadata**.

   It expands to display Systems, Environments, Tables, and Columns.

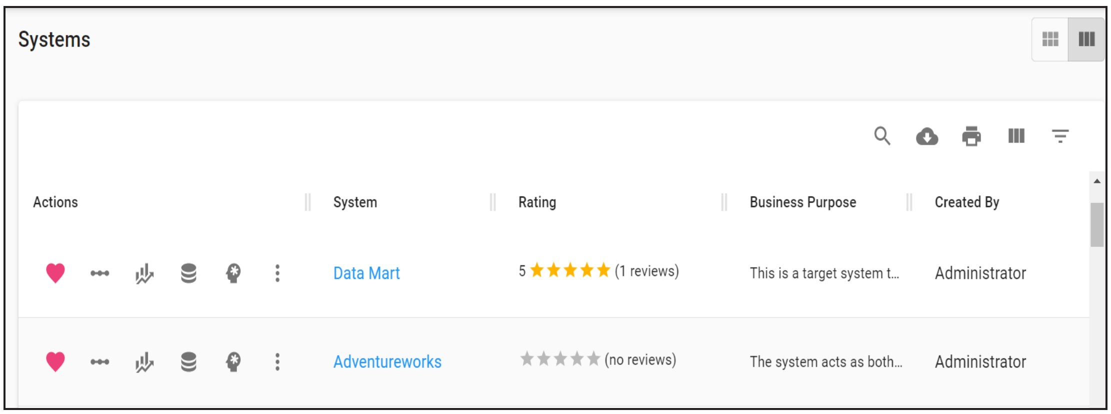
2. Click **Systems**.

   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.

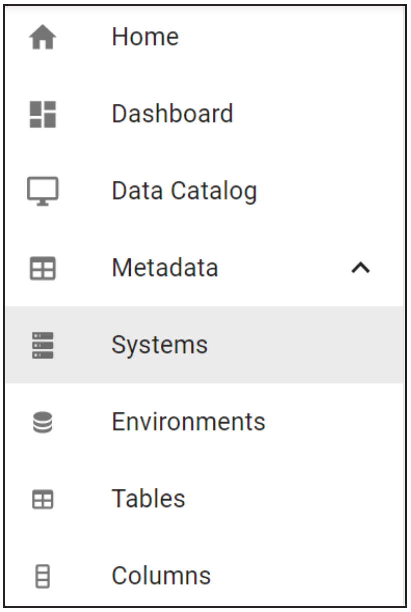
Environments

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:

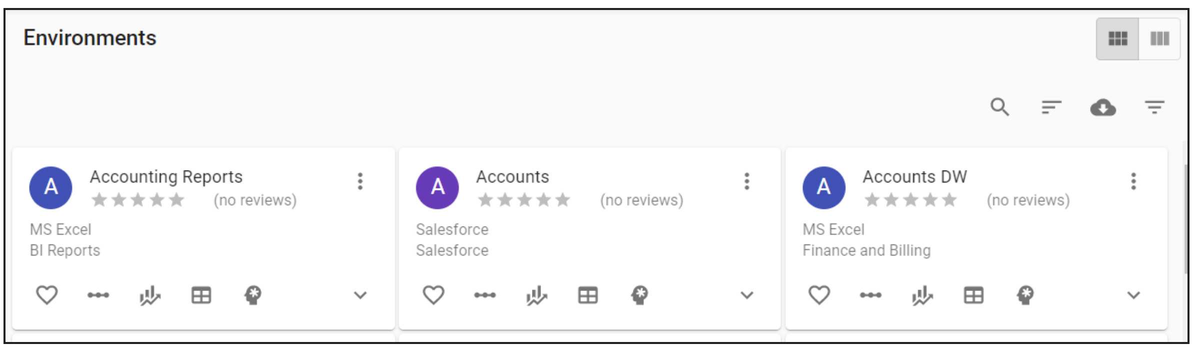
1. On the application menu, click **Metadata**.

   It expands to display Systems, Environments, Tables, and Columns.



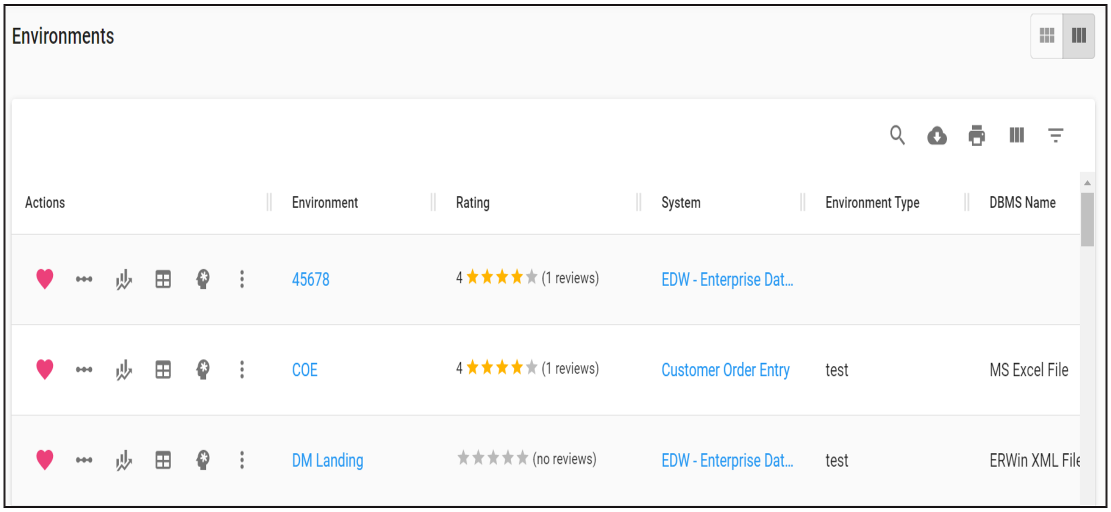
2. Click **Environments**.

   By default, the Environments card view appears.



3. Click .

   The Environments grid appears. It displays a list of environments. You can click <Environment_Name> and <System_Name> to view their details.



Use the following options to work on the Environments grid:

Search ( )

Use this option to filter the required rows.

Export as Excel ( )

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

Print ( )

Use this option to print the list of environments.

Columns ( )

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

Filter Table ( )

Use this option to filter the required rows based on:

- Environment
- System
- Environment Type

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

For more information on environment details, its associations, lineage, and mind maps refer to the Environments section.

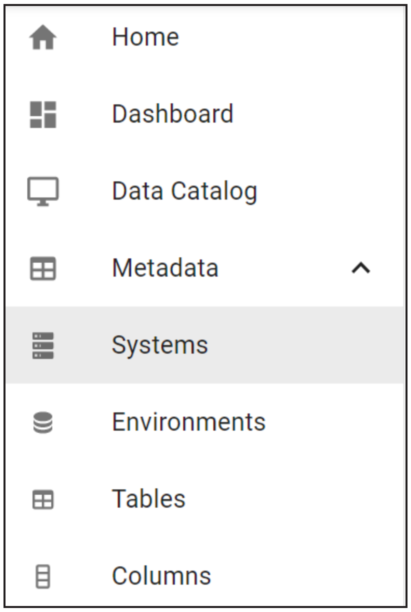
Tables

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

To access the Tables grid follow these steps:

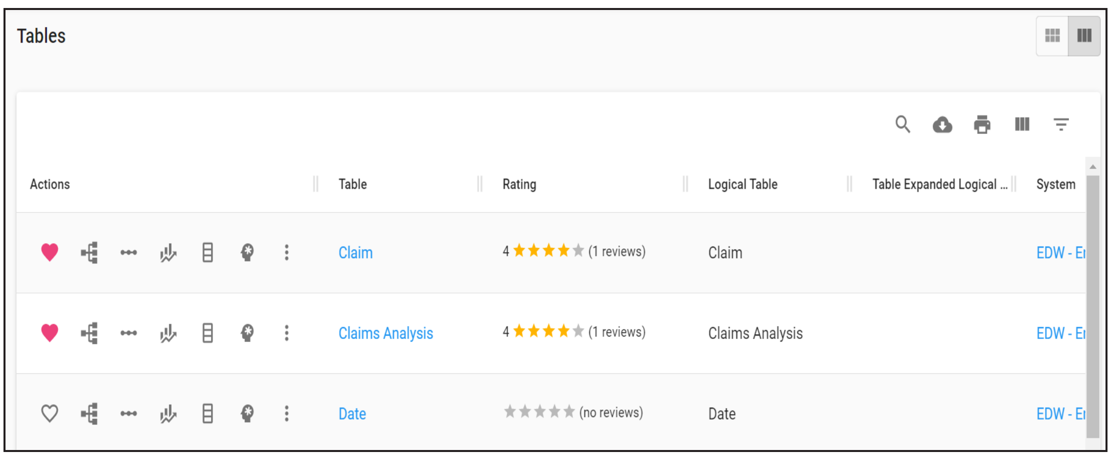
1. On the application menu, click **Metadata**.

   It expands 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.

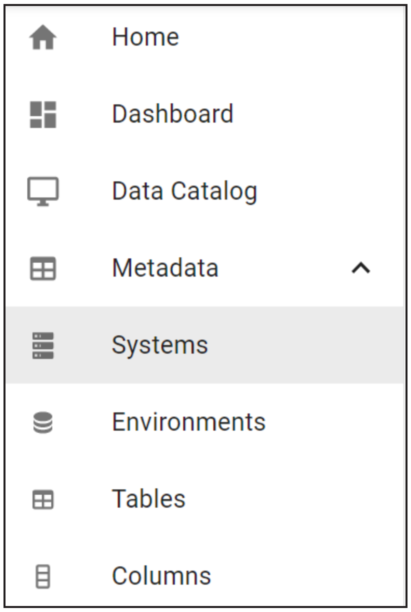
Columns

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:

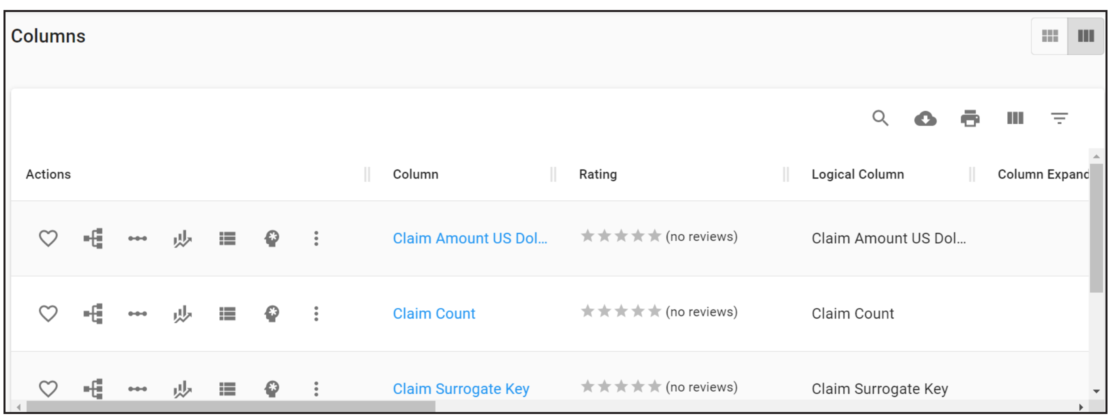
1. On the application menu, click **Metadata**.

   It expands 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

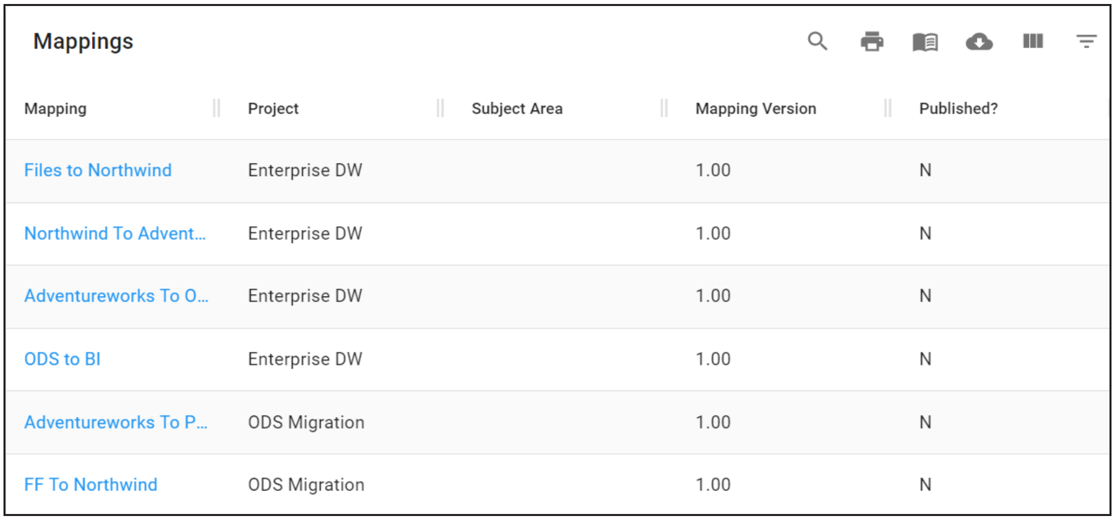
For more information on columns, its associations, mappings, lineage, and mind maps refer to the Columns section

Mappings

erwin DI Business User Portal (BUP) gives you access to all the mappings available in your erwin Data Intelligence Suite (DI Suite) application. The Mappings page displays mappings in a grid, where you can navigate or use advanced filtering to find a required mapping. You can also open mappings, view their details, and analyze them using source, target, and transformation details. Apart from this, you can also view test specifications related to mappings.

To access mappings, on the application menu, click **Mappings**.

The Mappings grid view appears. Click mappings in the Mapping column to view their details.



Use the following options to filter, export, and manage access to the mapping projects:

Search ( )

Use this option to search required mappings.

Print ( )

Use this option to print the list of mappings.

Projects ( )

Use this option to manage user and role access to mapping projects. For more information about managing access, refer to [Managing Access] topic.

Export as Excel ( )

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

Columns ( )

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

Filter Table ( )

Use this option to filter the mappings based on available columns.

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

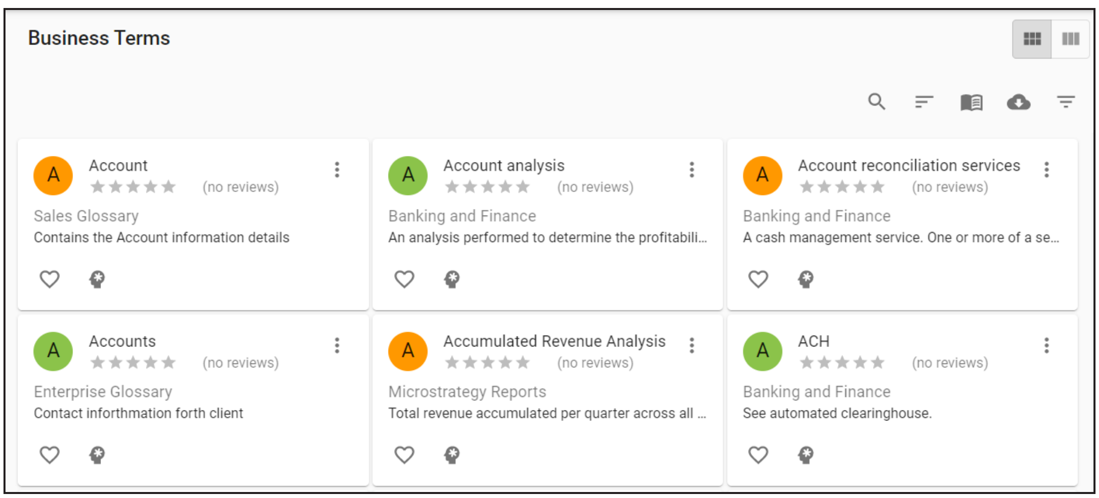
Business Terms

erwin DI Business User Portal (BUP) gives you access to view a business term's details, associations, valid values, and mind map, Workflow Details, Audit Detail, and Documents. 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. On the application menu, click **Business Terms**.

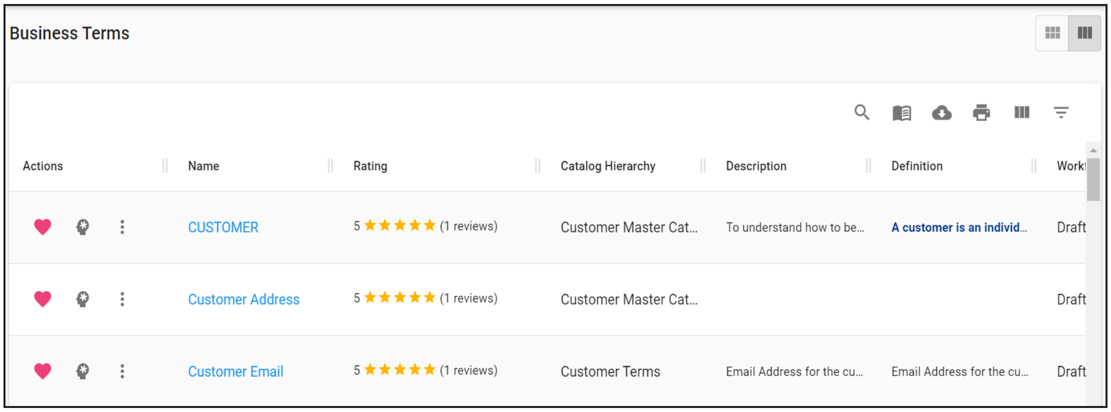
   By default, the Business Terms card view appears.

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

2. Click .

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



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

Search ( )

Use this option to filter the required rows.

Catalogs ( )

Use this option to manage access for catalogs.

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.

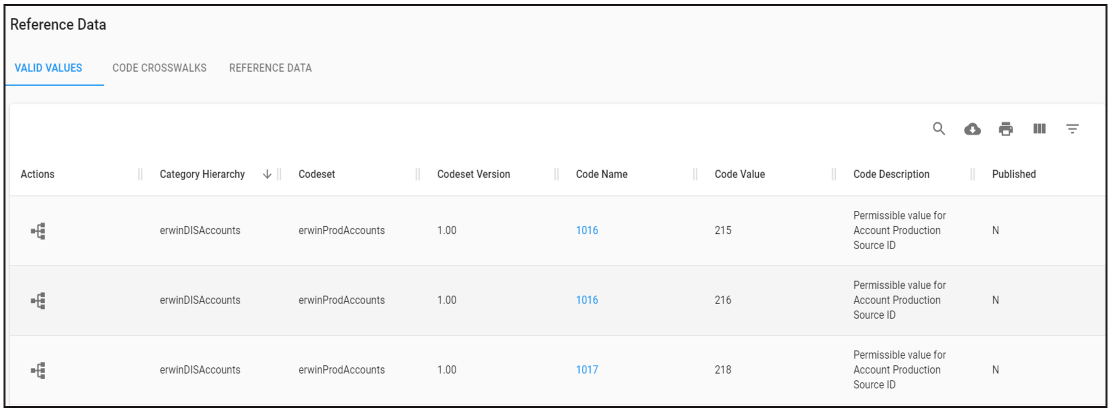
For more information on business terms and other business assets refer to the Data Literacy section.

Reference Data

Reference data sets the permissible values for other data fields. You can view all your codesets (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 application 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 application 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_BDM_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.

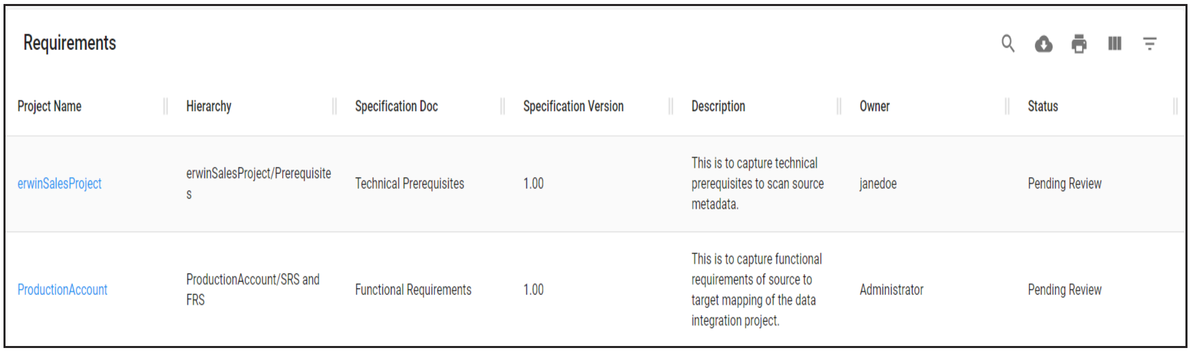
For more information on project details, release details, and release object details refer to the Releases topic.

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 application menu, click **Requirements**.

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



Requirements

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

Use the following options to work on the grid:

Search ( )

Use this option to filter the required rows.

Export as Excel ( )

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

Print ( )

Use this option to print the list of projects.

Columns ( )

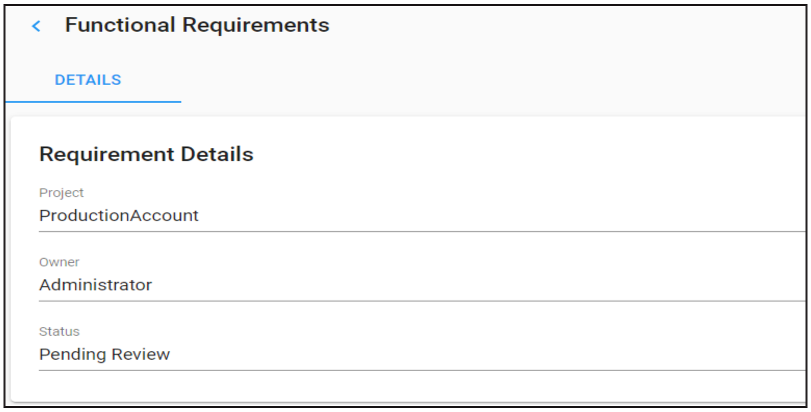
Use this option to select columns, which you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Filter Table ( )

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

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

To view project details, in the **Requirements** page, click <Project_Name>.

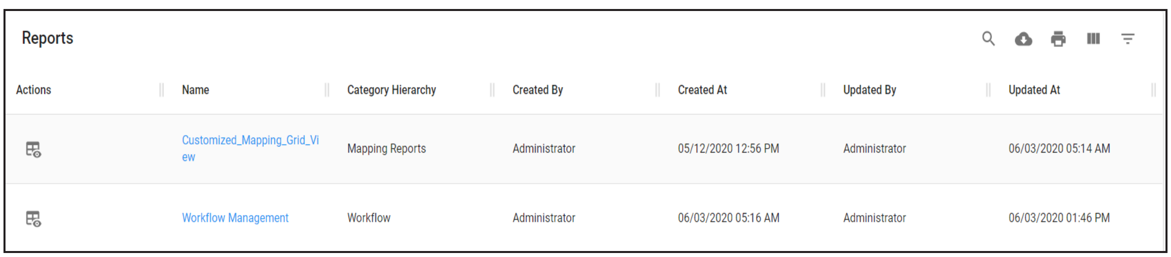


Reports

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

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

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



Use the following options to work on the grid:

Search ( )

Use this option to filter the required rows.

Export as Excel ( )

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

Print ( )

Use this option to print the list of reports.

Columns ( )

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

Filter Table ( )

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

For more information on report details and report output, refer to the Reports topic.