

erwin DI Business User Portal

User Guide

Release v11.0

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

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- Product and documentation downloads
- erwin Support policies and guidelines
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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 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,
INICIALIALA	mappings, and mind maps.
Mappings	It displays mapping projects, mapping specifications, test specifications, and
	source and target details.
<u>Business</u>	It displays business terms, their associations, and mind maps.
<u>Terms</u>	it displays business terms, their associations, and mind maps.
<u>Business</u>	It displays business policies, their associations, and mind maps.
<u>Policies</u>	it displays business policies, their associations, and mind maps.
<u>Business</u>	It displays business rules, their associations, and mind maps.
<u>Rules</u>	it displays business rules, then associations, and mind maps.
Custom	It displays custom asset types, custom object details, associations, and mind
<u>Assets</u>	maps.
Reference	It displays codesets as valid values, code crosswalks, and reference data
<u>Data</u>	It displays codesets as valid values, code crosswalks, and reference data.
<u>Releases</u>	It displays release projects, release details, and release object details.
Requirements	It displays requirement projects and their details.
<u>Reports</u>	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 <u>Home</u> page appears by default.

=	DI Business User P	ortal 1 A 🔿 (
A	Home 2	
	Dashboard	Mission & Goals & Objectives Principles Measurement Governance Stakeholders
	My Actions	Statement Objectives Of Oda's Statement
⊞	Metadata 🗸	To protect and improve our data assets and enable data transparency
-6	Mappings	
	Business Terms	A culture that values data enterprise wide and ensures the security and integrity of all data assets, data uses and data related processes while maximizing the value and utility of our data to support decision making
E	Business Policies	い ジロ ・ To define, approve and communicate data strategies, policies, standards, architecture, procedures and metrics
.	Business Rules	To define, approve and communicate data strategies, policies, standards, architecture, procedures and metrics To track and enforce regulatory compliance and conformance to data policies, standards, architecture and procedures To sponsor, track and oversee the delivery of data management projects and services To understand and promote the value of data assets
=	Custom Assets 🔹 🗸	Yes • To manage and resolve data related issues Yes • To understand and promote the value of data assets
E	Reference Data	
E	Releases	
=	Requirements	Integrity Data Governance participants will practice integrity with their dealings with each other, they will be truthful and forthcoming when discussing

UI Section	lcon	Function
		Application Menu : Click this icon to expand the application menu and access modules.
	0	 Click this icon to use the following options: Help: Access online help Feedback: Access erwin User Community
1-Top Pane		 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.
	3	 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 information for business users, important images, hyperlinks, text, and more.



To configure the Home page, follow these steps:

1. Click 🍄.

Hom	Home O											
	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.											
	WRIT	E		PRE								
т	В	I	÷	Θ	77	$\langle \rangle$		≣			Ē.	
[Cli	y Data ()(www.e	rwin.c	om) to ;	go to f ers**					 Ema	ail	
 St Mi	eve Smit ke Adams	 :h s	VP, Dire	ctor of	ss Com Accou	oliance nting	Da Lead	ta Gove Data S	ernance Steward	Adı İ	tvisor janedoe@erwin.com janedoe@erwin.com	

- On the Write tab, use Markdown syntax to edit the page.
 For information about Markdown, refer to the <u>Markdown Guide</u>.
- 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 \mathfrak{G} .

His	story						୦ Ⅲ =
	Actions		Version	Created By	Created At	Updated By	Updated At
	5	Î	3	Administrator - Default System User	05/28/2020 07:04 AM	Administrator - Default System User	05/28/2020 07:04 AM
	5	Î	2	Administrator - Default System User	05/28/2020 06:42 AM	Administrator - Default System User	05/28/2020 06:42 AM
	5	Î	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 (\mathbf{Q})

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**.

=	DI Business User Portal				?
÷.	Dashboard				^
::					
⊞	Metadata		Projects		
-6			Ê		
			_		
E	SENSITIVE DATA SYSTEMS	224	PROJECTS SUBJECT AREAS	5	
0 	ENVIRONMENTS TABLES	32 60			
==	COLUMNS	964			
E					
≡	Manninga		Delegen		
:=	Mappings		Releases		
			الله ا		-

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 <u>Releases</u> 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 <u>Business Policies</u> 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 <u>Requirements</u> 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 <u>Reports</u> 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.

DI Business User Portal ф 🕐 🔒 Ħ My Actions Q = C Filters 6 i Status Wed Jul 14 2021 ^ ⊞ All Tasks (12) O B ! Update Metadata Update Metadata for the Employee Details environment To-do Tasks (5) 4.0 4.0 4.0 Request Access (4) Thu Jul 15 2021 ^ O Update business term definition Update business term definition of Taxonomy Ħ Select Date ... - 07/12/2021 ₿ Fri Jul 16 2021 ~ Assets -÷ 🔘 📋 ! Link Technical Assets to ACH 3rd Party Flat... Account Due after Mon Jul 19 2021 E Account analysis New Task Banking and F O BT Association is incorrect and needs to be modified Fri Jul 23 2021 Ê Accounting Orde

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

UI Sec- tion	Function
1-Task	Use this section to <u>create</u> and <u>manage</u> tasks. This section displays a list of tasks that
List	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.

My Actions		
Create Task		
Name *		
Add task name		
Task Type		
To-do Task		-
Description		
Add description		
High Importance		
Due Date		
Add due date		
Assign Items		
	CANCEL	SUBMIT

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
	Specifies the name of a task.
Name	For example, Set Sensitive Clas-
	sification.
	Specifies the task type.
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 envir- onment. 			
	 Issue: Indicates that the task is about logging an issue. For example, Association of a busi- ness term is incorrect and needs to be modified. 			
Description	Specifies the description of a task. For example: Mark this asset as sens-			
	itive 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.			
	Specifies the system related to the			
System	task. This field is available only when			
System	Asset Type is set to Systems, Envir-			
	onments, Tables, or Columns.			
	Specifies the environment related to			
Environment	the task. This field is available only			
	when Asset Type is set to Envir-			
	onments, 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.
	Specifies the column related to the
Column	task. This field is available only when
	Asset Type is set to Columns.
	Specifies the catalog of a business
	asset. This field is available only
Catalog	when Asset Type is set to Business
	Terms, Business Rules, Business
	Policies, or Custom Asset.
	Specifies the business term related to
Business Term	the task. This field is available only
	when Asset Type is set to Business
	Terms.
	Specifies the business rule related to
Dusiness Dule	the task. This field is available only
Business Rule	when Asset Type is set to Business
	Rules.
	Specifies the business policy related
Business Policy	to the task. This field is available only
business Folicy	when Asset Type is set to Business
	Policies.
	Specifies the custom asset type
Custom Assot Tupo	related to the task. This field is avail-
Custom Asset Type	able only when Asset Type is set to
	Custom Asset.
	Specifies the custom asset related to
Custom Asset	the task. This field is available only
CUSTOIN ASSEL	when Asset Type is set to Custom

Filed Name	Description
	Specifies the user type assigned to the task.
	Users Assigned to Assets: Indic-
	ates that the user is an erwin
	DI BUP user assigned to this
	asset
	 Business Users: Indicates that
User Type	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
Select Users	task.
	Specifies the email ID of the external
	user. This field is available only when
Email	User Type is set to External Users.
	For example, chris.harris@quest.com
_	Use this option to filter the list of
Filter assigned users (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 (Q)

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 (C)

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.

My Actions				
	Q = G	•	Filters	
Tomorrow	,	^	Status	
	Update Metadata		All Tasks (13)	_
	Update Metadata for the Employee Details environment		To-do Tasks (6)	
	Employee Details environment		Request Access (4)	
Fri Jul 16	2021	^	Issue (3)	-
0 🔒 !	Link Technical Assets to ACH		Due by Select Date 07/13/2021	
Sat Jul 17	2021	^		
) 🔒 !	Set Sensitive Classification Update the sensitivity of the Northwind environment.	n	Assets 3rd Party Flat	-
No due da	ite	^	Sales Glossary	
0 8	Link Account attributes		Account analysis Banking and Finance	
0 8	Update Metadata		BI Reports/Accounting Rep	

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.

My Actions				
Q =	c o	Filters	6	2
Due after Tue Jul 20 20	21 ^	Status		
BT Association		All Task	s (13)	
BT Association is	ncorrect	To-do Ta	asks (6)	
and needs to be m	odified	Request	Access (4)	
No due date	^	lssue (3)	•
🔿 📋 Link Account a	ttributes	Due by Select	Date 🔻 07/13/2021	
Need access for 🜔 🤰 weeks on Accou	-	Assets		-
Orders Table		**	3rd Party Flat	
🔵 📋 Update Metada	ta		Account Sales Glossary	
			Account analysis Banking and Finance	
	+	⊞	Accounting Orde BI Reports/Accounting Rep	

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.

My Actions				
Edit Task	✓ ∎		Comments	C
Name* Update Metadata		^	No comments present	
Task Type To-do Task	Ŧ	L		
Description Update Metadata for the Employee Details environment		L		
High Importance				
Due Date Wed Jul 14, 2021	ä		Comment Enter comment and click submit	
Assign Items			Notify Assigned Users Users	•
Asset Type		•		
(CANCEL UPDATE			SUBMIT

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.

My Actions		
Q = C 🙆	Filters	ŝ
Completed ^	Status	
	Issue (3)	•
	Open Tasks (9)	- 14
Update Metadata	Completed Tasks (4)	- 1
 Update Metadata for the Employee Details environment 	Created By Me (12)	-
Update business term definition Update business term definition of Taxonomy	Due by Select Date ▼ 07/13/2021	
Set Sensitive Classification Image: Set Sensitive Classification Image: Set Sensitivity of the Sensitivity of the Northwind environment.	Assets	÷
	3rd Party Flat	^

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 <u>configuring erwin DI BUP</u>, user accounts, <u>viewing reports</u> and <u>managing security</u>.

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:

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

The following page appears.

	DATA INTELLIGENCE SUITE	Miscellaneo	us Settings					08	
•	Workflow Settings Lang	guage Settings	License Renewo	al Reminder Fo	rm Validation Se	ttings BUP De	etails	Mapping Li	inea 🖡
	Instances								•
									÷
#	Name	URL		Description	Status	Up Since	Edit	Delete	Histo

2. Click 💽.

The New Instance page appears.

New Instance		_ = ×
	Sat	ve Cancel
Name :		
URL :		
	Note : http/https://:/ApplicationName	
Description :	A H B I U ≣ ≣ ≡ ≡	≹ ⊟
		*
		· · · · ·

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.

Account	
Administration	^
Logout	

2. Click Administration.

The Administration page appears.

Administration	
Users	Roles
Manage users Manage user sessions Manage registration requests	Manage roles
Reports	Security
View Reports	Manage blocked addresses

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 a asterisk (*) are mandatory. Refer to the following table for field descriptions:

Description			
 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, busi- ness rules, and custom assets.			
Specifies the modules assigned to the role.			
For example, Business Rules.			
Click $+$ and then, click $ar{f V}$ 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.

<	Roles				(२ 💷 = +
	Actions	Name	Created By	Created At	Updated By	Updated At
	Î	public	System User	05/08/2020 09:07 PM	System User	05/14/2020 04:55 AM
	Î	Administrator	System User	05/08/2020 09:07 PM	System User	05/08/2020 09:07 PM
	Î	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.

Account	
Administration	•
Logout	

2. Click Administration.

The Administration page appears.

Administration	
Users	Roles
Manage users Manage user sessions Manage registration requests	Manage roles
Reports	Security
View Reports	Manage blocked addresses

3. Under the Roles section, click Manage roles.

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

<	Roles					० Ⅲ ऱ +
	Actions	Name	Created By	Created At	Updated By	Updated At
	Î	public	System User	05/08/2020 09:07 PM	System User	05/14/2020 04:55 AM
	Î	Administrator	System User	05/08/2020 09:07 PM	System User	05/08/2020 09:07 PM
	Î	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	Î
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 (Q)

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 **S**.

The following options appear.



2. Click Administration.

The Administration page appears.

Administration	
Users	Roles
Manage users Manage user sessions Manage registration requests	Manage roles
Reports	Security
View Reports	Manage blocked addresses

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

The Registration Requests page appears.

<	Registration Requests				Q		Ŧ	+
	Actions	Email	Created By	Created At				
			Sorry, no matching records found					
				Rows per page: 10 👻	0-0	of 0	<	>

4. Click +.

The Send Registration Request page appears.
Send Registration Request		
Please provide email address to send the re	gistration re	equest.
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 Reques	ts			Q	ш	Ŧ	+
	Actions	Email	Created By		Created At			
	i c	sojha@erwin.com	Administrator - Default System User		05/27/2020 0	9:16 AM		
			R	ows per page:	10 👻 1-1	of 1	<	>

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 (\mathbf{Q})

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.

Account	
Administration	•
Logout	
	Administration

2. Click Administration.

The Administration page appears.

Administration	
Users	Roles
Manage users Manage user sessions Manage registration requests	Manage roles
Reports	Security
View Reports	Manage blocked addresses

3. Under the Users section, click Manage Users.

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

<	Users			< ₩ Ξ
	Actions	Username	Name	Email
	Î	Administrator	Administrator - Default System User	abc@abc.com
	Î	Sojha	Saras	sojha@erwin.com
	Î	public	public - Default User	abc@abc.com

4. Click the required user.

The User Details page appears.

User Details		
	Name *	
	Saras	
	Username	
	Sojha	
S	Email Address *	
	sojha@erwin.com	
		-
	SEND FORGOT PASSWORD EMAIL CHANGE PASSWORD	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 (\mathbf{Q})

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 **S**.

The following options appear.

Account	
Administration	^
Logout	

2. Click Administration.

The Administration page appears.

Administration	
Users	Roles
Manage users Manage user sessions Manage registration requests	Manage roles
Reports	Security
View Reports	Manage blocked addresses

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

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

<	Sessions					∆
	Actions	Username	User Type	IP Address	Issued At	Expires At
	Đ	Administrator	PLATFORM	183.83.135.30	05/27/2020 06:55 PM	05/27/2020 07:15 PM
	Ð	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.

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.

Administration	
Users	Roles
Manage users Manage user sessions Manage registration requests	Manage roles
Reports	Security
View Reports	Manage blocked addresses

- 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.

< Asset Assignments		1 6 2 2
Business Term Catalogs		2 <a> Contents Con
Catalog Name	Catalog Hierarchy	Role Name Asset Types
Banking and Finance	Banking and Finance	Power User Business Rule Catalogs
Banking and Finance	Banking and Finance	Business User Business Policy Catalogs
GDPR Glossary	GDPR Glossary	Datastores Catalogs public TAGS Catalogs
GDPR Glossary	GDPR Glossary	Administrator Business Processes Catalogs
Healthcare Glossary	Healthcare Glossary	Business User Recovery Policies Catalogs
Microstrategy Reports	Microstrategy Reports	public ✓ Systems Rows per page: 25 ← 1-6 of 6 < > Environments
Business Rule Catalogs		Mapping Projects Q
Catalog Name	Catalog Hierarchy	Role Name
Enterprise Rules	Enterprise Rules	public
		v

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	lcon	Function
	0	Export as Excel: Use this option to download a
		report in the XLSX format.
1-Role/User		Use this option to switch between report by roles
Switch and		and users. By default, roles is selected.
Export		If you switch to users, User's Name and Username
		columns appear in the report.
		Search: Use this option to search the required cata-
2-Filter and	Q	log, hierarchy, system, environment, project, sub-
Export for		ject area, and roles or users.
Asset	ē	Print: Use this option to print the report of a spe-
	5	cific 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	lcon	Function
		Filter Table: Use this option to filter the inform-
	· ·	ation available in reports. The filter options avail-
		able 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.

Administration	
Users	Roles
Manage users Manage user sessions Manage registration requests	Manage roles
Reports	Security
View Reports	Manage blocked addresses

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.

<	Security		Q III =
	Actions	IP	Expired at
	÷	183.83.133.12	07/14/2021 01:48 PM
	÷	49.36.115.72	07/14/2021 01:43 PM

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 (Q)

Use this option to search the blocked address.

View Columns (III)

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 **S**.

The following options appear.



2. Click Administration.

The Administration page appears.

Administration	
Users	Roles
Manage users Manage user sessions Manage registration requests	Manage roles
Reports	Security
View Reports	Manage blocked addresses

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

The Registration Requests page appears.

•	Registration Requests				Q	ш	Ŧ	+
	Actions	Email	Created By	Created At				
			Sorry, no matching records found					
				Rows per page: 10 💌	0-0	of 0	<	>

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								÷	+
	Actions		Email	Created By		Created A	At			
	Î	Θ	sojha@erwin.com	Administrator - Default System User		05/27/20	20 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.



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

Use the following options to work on registration requests:

Search (\mathbf{Q})

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.

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 <u>Configuring User Accounts</u> 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.

A	Home	
	Dashboard	
Ţ	Data Catalog	
⊞	Metadata	^
- 1 - 1 - 1	Systems	
0))	Environments	
⊞	Tables	
₿	Columns	

2. Click Systems.

By default, the Systems card view appears.

Systems					
				Q =	ō ÷
3 3rd Party Flat Files ★★★★★ (no reviews)	* * *	A Accounting System	*	Adventureworks	* *
ي الله الله الله	~	🖓 🤐 🥠	~	♡ ↓↓ € ₽	~

3. Click

The Systems grid appears. It displays a list of systems.

S	ystem	ıs									
									० ८ ह ш	÷	-
	Actions						System	Rating	Business Purpose Created By		•
	۲	•••	₩	0))	ø	0 0 0	Data Mart	5 \star \star \star \star \star (1 reviews)	This is a target system t Administrator		
	۲	•••	*	0))	٥	0 0	Adventureworks	★★★★★ (no reviews)	The system acts as both Administrator		

Use the following options to work on the Systems grid:

Search (Q)

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 <u>Systems</u> 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.

Environments					
				Q = 0	6 .
Accounting Reports (no reviews)	:	Accounts	:	A Accounts DW MS Excel (no reviews)	:
BI Reports	~	Salesforce	~	Finance and Billing	~

3. Click

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

Envii	ronr	nent	S										
										۹ 🛛	ē "	Ē	
Acti	ions						Environment	Rating	System	Environment Type	DBMS	Name	
			唹	⊞	Ø	• •	45678	4 ★ ★ ★ ★ ★ (1 reviews)	EDW - Enterprise Dat				
			₩	⊞	ø	0 0 0	COE	4 ★ ★ ★ ★ ★ (1 reviews)	Customer Order Entry	test	MS E	xcel File	
			₩	⊞	Ø	0 0 0	DM Landing	***** (no reviews)	EDW - Enterprise Dat	test	ERWi	n XML File	

Use the following options to work on the Environments grid:

Search (\mathbf{Q})

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 <u>Environments</u> 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.

Tables																
										(Q	0	ē	ш	Ŧ	
Actions							Table	Rating	Logical Table	Table	e Expa	anded L	ogical	. :	System	1
۲	÷	***		₿	Ø	* *	Claim	4 ★ ★ ★ ★ ★ (1 reviews)	Claim						EDW -	Ei
•	-6	***	<i>"</i> Ь	₿	Ø	*	Claims Analysis	4 ★★★★★ (1 reviews)	Claims Analysis						EDW -	EI
\heartsuit	÷		₩	₿	Ŷ	*	Date	\star \star \star \star \star (no reviews)	Date						EDW -	Ei

Use the following options to work on the Systems grid:

Search (^Q)

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 <u>Tables</u> 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.

Column	IS														
										Q	•	e	ш	Ŧ	
Actions							Column		Rating	Logical Colum	n		Colum	in Expa	nc
\heartsuit	•{	•••	₩	≡	Ø	0 0	Claim Amount US Do	ol	\star \star \star \star \star (no reviews)	Claim Amou	nt US D	ol			
\heartsuit	-6	•••	₩	≡	Ŷ	* * *	Claim Count		\star \star \star \star \star (no reviews)	Claim Count					
\heartsuit	÷	•••	₩	:=	ø	0 0 0	Claim Surrogate Key		***** (no reviews)	Claim Surrog	late Key	r			+

Use the following options to work on the Columns grid:

Search (\mathbb{Q})

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 <u>Columns</u> 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.

Mappings			c	۲ 🖶		2 III	÷
Mapping	Project	Subject Area	Mapping Version		Publish	ed?	
Files to Northwind	Enterprise DW		1.00		Ν		
Northwind To Advent	Enterprise DW		1.00		Ν		
Adventureworks To O	Enterprise DW		1.00		Ν		
ODS to BI	Enterprise DW		1.00		Ν		
Adventureworks To P	ODS Migration		1.00		Ν		
FF To Northwind	ODS Migration		1.00		Ν		

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

Search (\mathbb{Q})

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 <u>Managing Access</u> 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 <u>Mappings</u> 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.

Busines	s Ter	ms										
							Q		0	ē	ш	Ŧ
Actions			Name	Rating	Catalog Hierarchy	Description		Defini	tion			Work
۲	ø	:	CUSTOMER	5 ★ ★ ★ ★ ★ (1 reviews)	Customer Master Cat	To understand how	to be	A cus	tomer is	an indiv	/id	Draft
۲	ø	* * *	Customer Address	5 \star \star \star \star \star (1 reviews)	Customer Master Cat							Draft
۲	¢	:	Customer Email	5 \star \star \star \star \star (1 reviews)	Customer Terms	Email Address for t	he cu	Email	Address	for the	cu	Draft

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

Search (\mathbb{Q})

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 <u>Data Literacy</u> 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.

Reference Dat	ta						
VALID VALUES	CODE CROSSWALKS REFERENCI	DATA					
						۹. ۱	6 ē Ⅲ ₹
Actions	Category Hierarchy \downarrow	Codeset	Codeset Version	Code Name	Code Value	Code Description	Published
-4	erwinDISAccounts	erwinProdAccounts	1.00	1016	215	Permissible value for Account Production Source ID	Ν
-	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	Ν

For more information on valid values, code crosswalks, and reference data refer to the <u>Refer</u>ence 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				۹ 🚯	ē ≡ ₹
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:

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Search (\mathbb{Q})
```

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 <u>Releases</u> 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							Q	6	ē		Ŧ
Project Name	Hierarchy	Specification Doc	Specification Version	D	Description	Owner		Status			
erwinSalesProject	erwinSalesProject/Prerequisite s	Technical Prerequisites	1.00	р	This is to capture technical rerequisites to scan source netadata.	janedoe		Pendir	ng Revi	iew	
ProductionAccount	ProductionAccount/SRS and FRS	Functional Requirements	1.00	re ta	his is to capture functional equirements of source to arget mapping of the data ntegration project.	Administrator		Pendir	ng Rev	iew	

Use the following options to work on the grid:

Search (\mathbb{Q})

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>.

< Functional Requirements	
DETAILS	
Requirement Details	
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 application menu, click **Reports**.

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

Reports						Q	6	8 Ⅲ	÷
Actions	Name	Category Hierarchy	Created By	Created At	Updated By		Updated A	At	
æ	Customized_Mapping_Grid_Vi ew	Mapping Reports	Administrator	05/12/2020 12:56 PM	Administrator		06/03/20	20 05:14 AI	M
æ	Workflow Management	Workflow	Administrator	06/03/2020 05:16 AM	Administrator		06/03/20	20 01:46 PI	N

Use the following options to work on the grid:

Search (\mathbb{Q})

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 <u>Reports</u> topic.