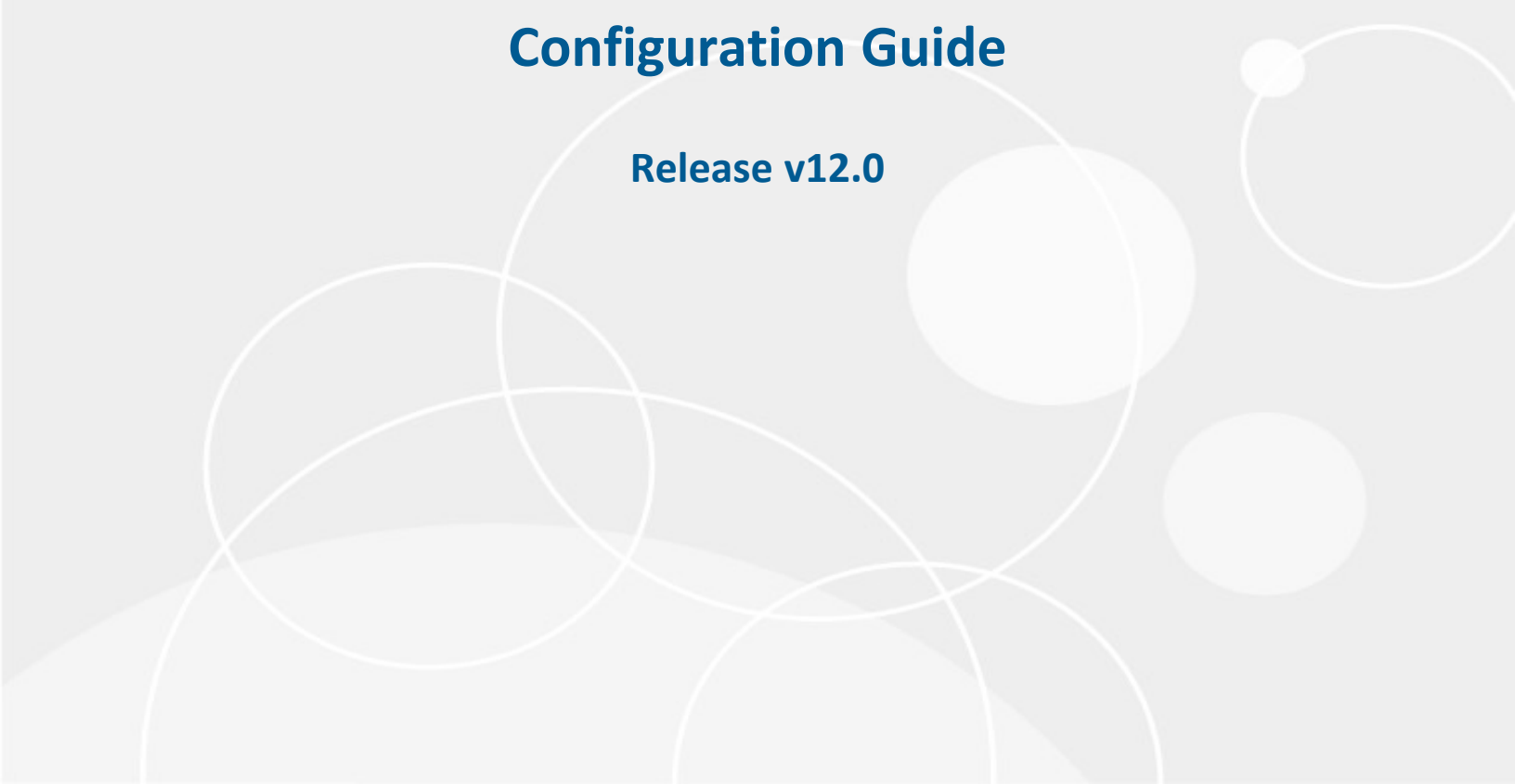




erwin Data Intelligence

Configuration Guide

Release v12.0



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Registering for Support

Access the [erwin support](#) site and click Sign in to register for product support.

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For your convenience, erwin provides easy access to "One Stop" support for [erwin Data Intelligence \(erwin DI\)](#), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
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erwin Data Modeler News and Events

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Configuration

This section walks you through the settings for each module of erwin Data Intelligence (erwin DI). These settings enable you to configure erwin DI according to your preferences.

Configuring Discover Assets

On the Discover Assets Settings page, you can configure the Discover Assets module with respect to synchronizing asset properties and values with the corresponding asset properties and values configured in respective modules. After synchronization is complete for assets, you can discover and analyze their status. You can also schedule synchronization jobs, control asset types available in the Discover Assets module, and view activity logs.

To configure the Discover Assets module, follow these steps:

1. Go to **Application Menu > Settings > Discover Assets**.

The Discover Assets Settings page appears.

Configuration

The screenshot displays the 'Discover Assets Settings' interface in erwin Data Intelligence. The main area is titled 'CONFIGURATIONS' and contains a grid of asset type settings. At the top left is a 'History' button with a clock icon. At the top right is a 'Schedule For All' button with a toggle switch that is currently turned on. The grid consists of six panels, each representing an asset type: Systems, Environments, Tables, Columns, Mappings, and Business Terms. Each panel shows a progress indicator (a donut chart) with a percentage and a count of discovered assets. Below each progress indicator are three controls: a 'Use in Search' toggle switch, a 'SYNC NOW' button, and a 'SCHEDULE' button. The 'Systems' panel shows 100.0% completion for 22/22 systems. The 'Environments' panel shows 100.0% completion for 22/22 systems and 100.0% completion for 36/36 environments. The 'Tables' panel shows 100.0% completion for 36/36 environments and 100.0% completion for 1374/1374 tables. The 'Columns' panel shows 100.0% completion for 1374/1374 tables and 100.0% completion for 16511/16511 columns. The 'Mappings' panel shows 80.0% completion for environments and 100.0% completion for tables. The 'Business Terms' panel shows 49.0% completion for environments and 100.0% completion for tables.

2. Use the following options:

Use in Search ()

Use this option to enable asset discovery for an asset type.

Sync Now

Use this option to start synchronization activity immediately for an asset type.

Schedule

Use this option to [schedule a synchronization job](#) for an asset type. The synchronization activity starts at the scheduled time for that asset type.

History ()

Use this option to view activity logs of all synchronization activities.

Disable Schedule for All ()

Configuration

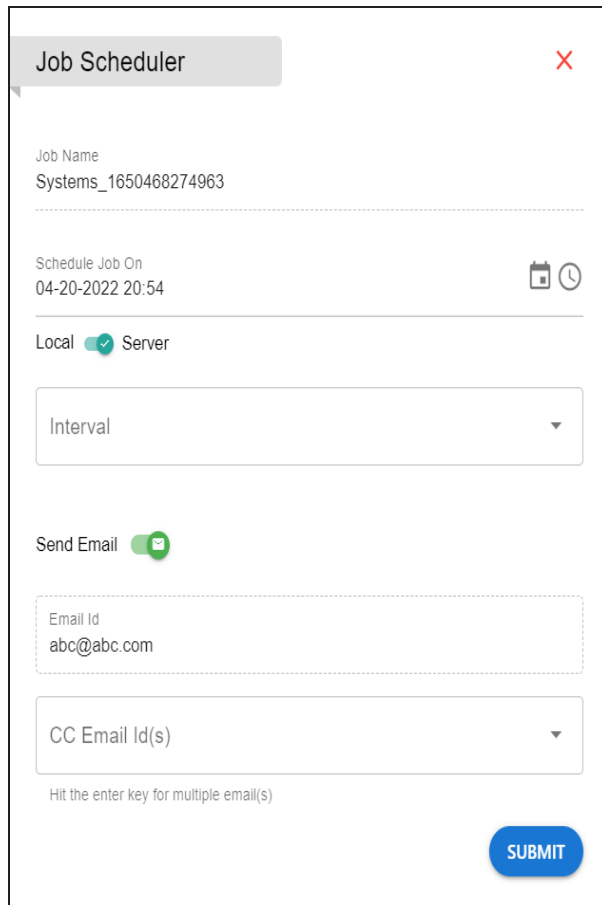
Use this option to enable or disable scheduling of synchronization jobs for all asset types.

Scheduling Synchronization Jobs

To schedule synchronization jobs, follow these steps:

1. On an asset type card, click **Schedule**.

The Job Scheduler page appears.



The screenshot shows a 'Job Scheduler' dialog box with the following fields and controls:

- Job Name:** Systems_1650468274963
- Schedule Job On:** 04-20-2022 20:54 (with calendar and clock icons)
- Local:** (unchecked)
- Server:** (checked)
- Interval:** A dropdown menu currently showing 'Interval'.
- Send Email:** (checked)
- Email Id:** abc@abc.com
- CC Email Id(s):** A dropdown menu.
- Hit the enter key for multiple email(s)** (text below the CC field)
- SUBMIT** button

2. Enter appropriate values in the fields. Refer to the following table for field descrip-

Configuration

tions.

Field Name	Description
Job Name	Specifies the job name. For example, Systems_1650468274963. This field auto-populates a job name and is uneditable.
Schedule Job On	Specifies the date and time of the job. For example, 03-24-2020 11:45.
Local or Server	Specifies whether the job uses local or server time. <ul style="list-style-type: none">▪ Local: Indicates that job uses date and time on your local machine▪ Server: Indicates that the job uses the date and time of a machine where your application is deployed
Interval	Specifies the frequency of the job. <ul style="list-style-type: none">▪ Only Once: Indicates that the job runs only once▪ Every Day: Indicates that the job runs everyday▪ Every Week: Indicates that the job runs weekly▪ Every Month: Indicates that the job runs monthly
Repeat	Specifies whether the job repeats everyday. This field is available only when Interval is set to Every Day.
Object Types	Specifies the object types for which the job is scheduled. This field is available only when you use Schedule For All option.
Send Email	Specifies whether job notifications are sent to your email ID and the email IDs mentioned in CC Email Id(s) field
Email Id	This field is auto-populated with your email ID. You receive email notifications about the scheduled job from the administrator's email ID.
CC List	Specifies the other email IDs that receive job notifications. Enter a comma-separated list of email IDs that should receive email notifications about the scheduled job. For example, ab.dav@xyz.com, cal.kai@xyz.com

Configuration

3. Click **Submit**.
-

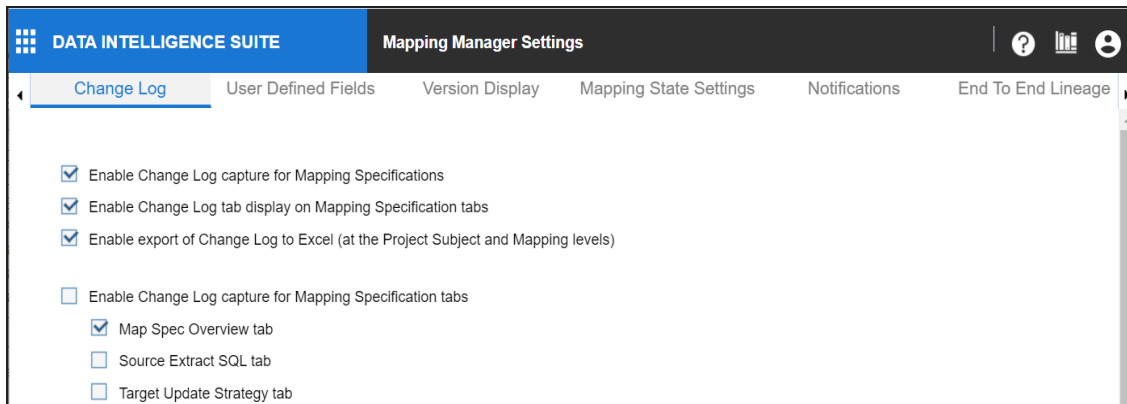
The synchronization job is scheduled.

Configuring Mapping Manager

On the Mapping Manager Settings page, you can set up the Mapping Manager with respect to:

- [Change Log](#): Under this, you can configure change logs.
- [User Defined Fields](#): Under this, you can add more user-defined fields.
- [Version Display](#): Under this, you can configure version display of maps.
- [Mapping State Settings](#): Under this, you can configure mapping states and sub-states.
- [Notifications](#): Under this, you can configure email notifications.

To access Mapping Manager Settings, go to **Application Menu > Settings > Mapping Manager**. The Mapping Manager Settings page appears:



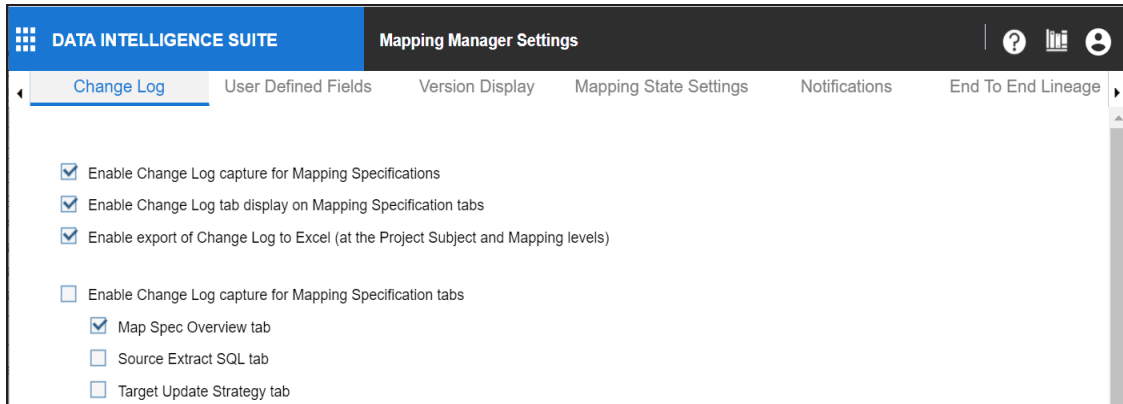
Configuring Change Log Settings

Change logs capture changes made to mapping specifications and additional mapping information. You can enable change logs and display them on the Change Log tab under the Additional Mapping Information pane. You can also export change logs to an MS Excel file at the project, subject, and mapping levels.

To configure change log settings, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.

The Mapping Manager Settings page appears. By default, it opens the Change Log settings.



2. Use the following options:

Enable Change Log Capture for Mapping Specifications

To capture change logs for the Mapping Specification tab, select the check box.

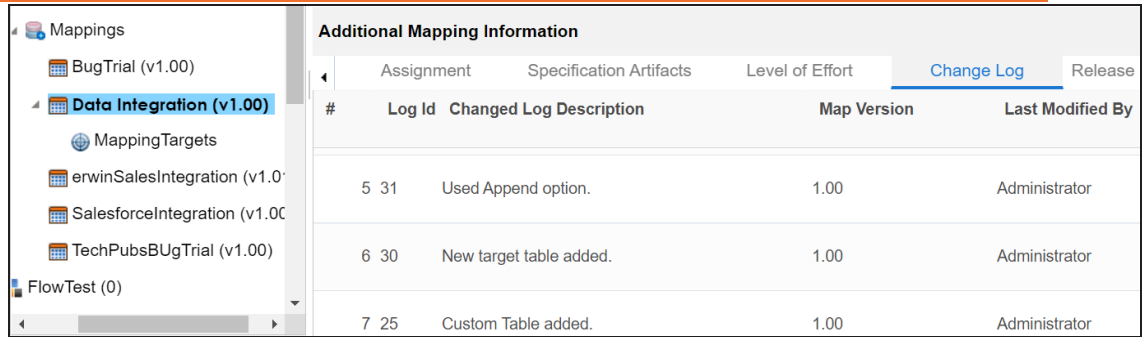
Enable Change Log tab display on Mapping Specification tabs

You can use this check box only when the Enable Change Log Capture for Mapping Specifications check box is selected.

To display the Change Log tab under the Additional Mapping Information pane, select the check box.

The Change Log tab appears under the Additional Mapping Information pane. The pane is available at bottom of the central pane when you click a map in Workspace Mappings.

Configuring Change Log Settings



The screenshot shows a table titled 'Additional Mapping Information' with the 'Change Log' tab selected. The table lists three change log entries for the 'Data Integration (v1.00)' mapping.

#	Log Id	Changed Log Description	Map Version	Last Modified By
5	31	Used Append option.	1.00	Administrator
6	30	New target table added.	1.00	Administrator
7	25	Custom Table added.	1.00	Administrator

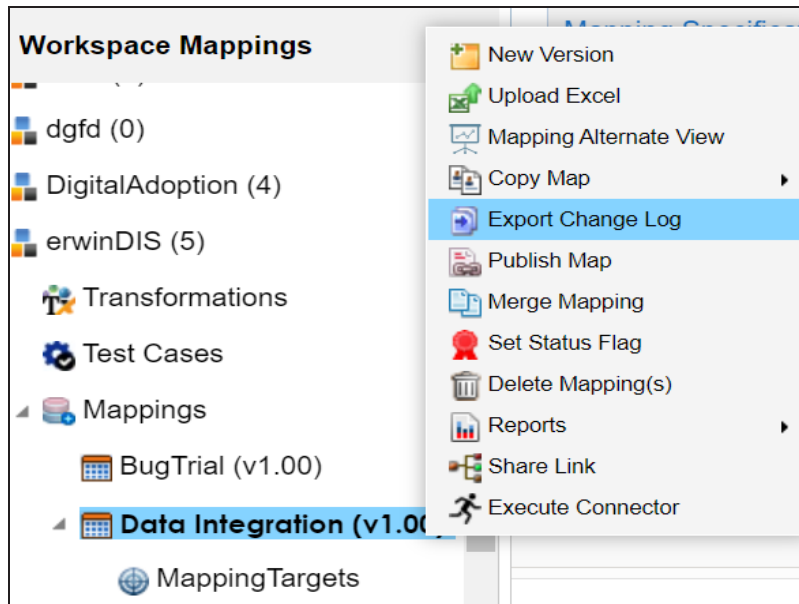
Enable export of Change Logs to MS Excel (at the Project Subject and Mapping Levels)

You can use this check box only when the Enable Change Log Capture for Mapping Specifications check box is selected.

To make Export Change Log option available, select the check box.

Now, you can export change logs to an MS Excel file at project, subject, and mapping level.

For example, the following image displays Export Change Log option at mapping level.



Configuring Change Log Settings

Enable Change Log capture for Mapping Specification tabs

You can capture change logs for tabs under the Additional Mapping Information pane. To capture change logs for tabs under the Additional Mapping Information pane, select the corresponding <Tab_Name> check box.

For example, to record change logs for Map Spec Overview tab under Additional Mapping Information, select the **Map Spec Overview tab** check box.

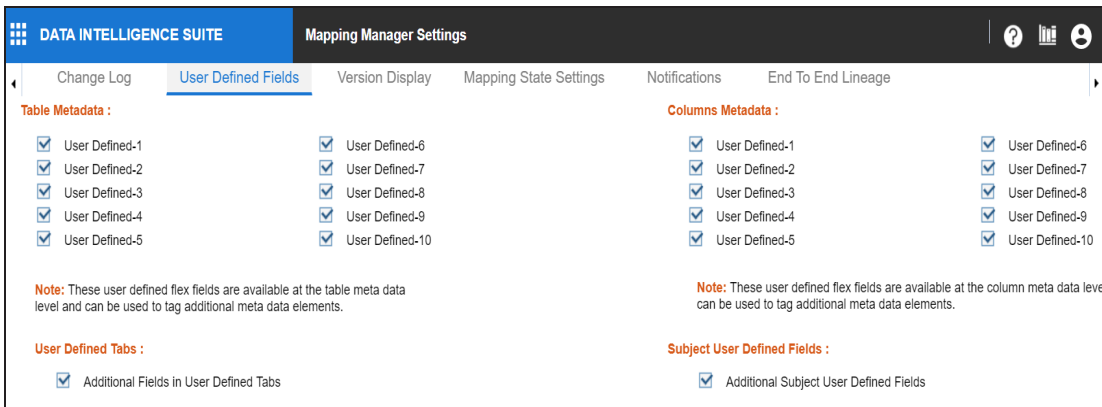
Configuring User-defined Fields

You can add more fields to the User Defined4 and User Defined5 tabs. These tabs are available under the Additional Mapping Information pane. You can also add more fields under the Subject Details tab.

To configure more fields on User Defined4 and User Defined5 tabs, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click the **User Defined Fields** tab.

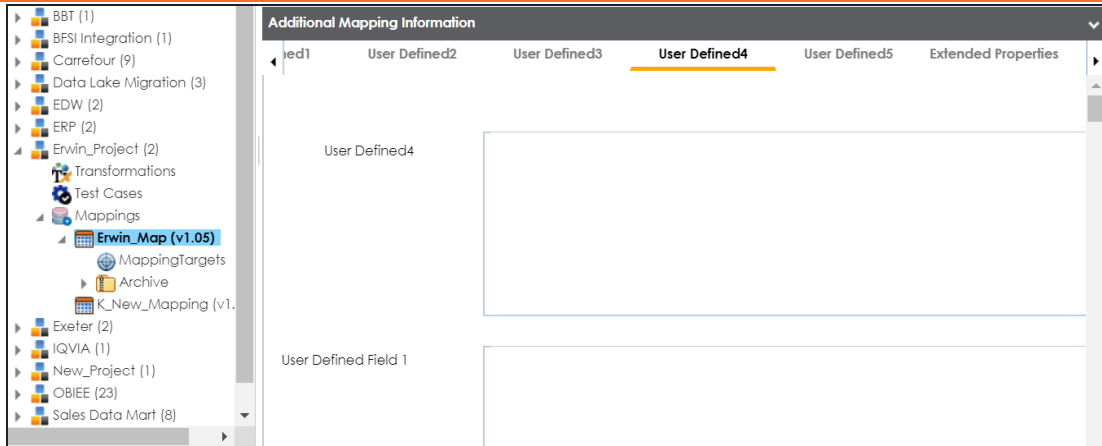
The following page appears.



3. Under the **User Defined Tabs** section, select the **Additional Fields in User Defined Tabs** check box.

20 additional fields are added to the User Defined4 and User Defined5 tabs.

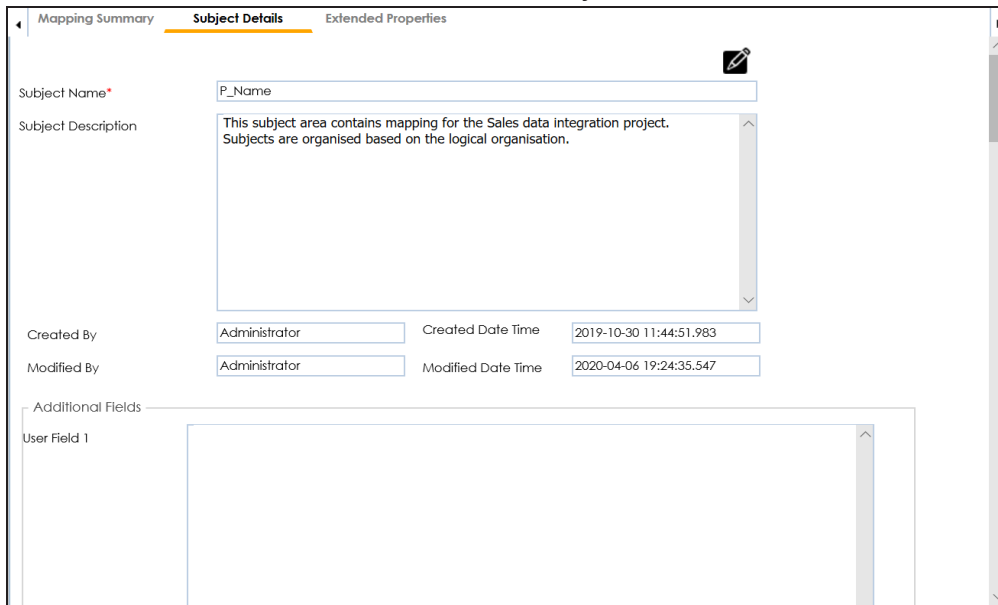
Configuring User-defined Fields



Use ◀ or ▶ to scroll to the User Defined4 and User Defined5 tabs.

To configure more fields on Subject Details tab, select the **Additional Subject User Defined Fields** check box.

15 additional fields are added under the Subject Details tab.



User-defined flex fields under Table Metadata and Columns Metadata section are available under the Table Properties and Column Properties tabs respectively.

Configuring User-defined Fields

You can set UI labels of user defined fields under the Language Settings. For more information, refer to the [Language Settings](#) topic.

Configuring Version Display

You can display map version in two ways:

1. **Standard Mapping Version:** This option displays the version of the map in a standard form.

For example, Erwin_Map (v.1.00), where Erwin_Map is the Map Name and 1.00 is the Map Version.

2. **Version Label:** This option displays the version of the map using a version label.

For example, Erwin_Map (Data_Migration), where Erwin_Map is the Map Name and Data_Migration is the Version Label.

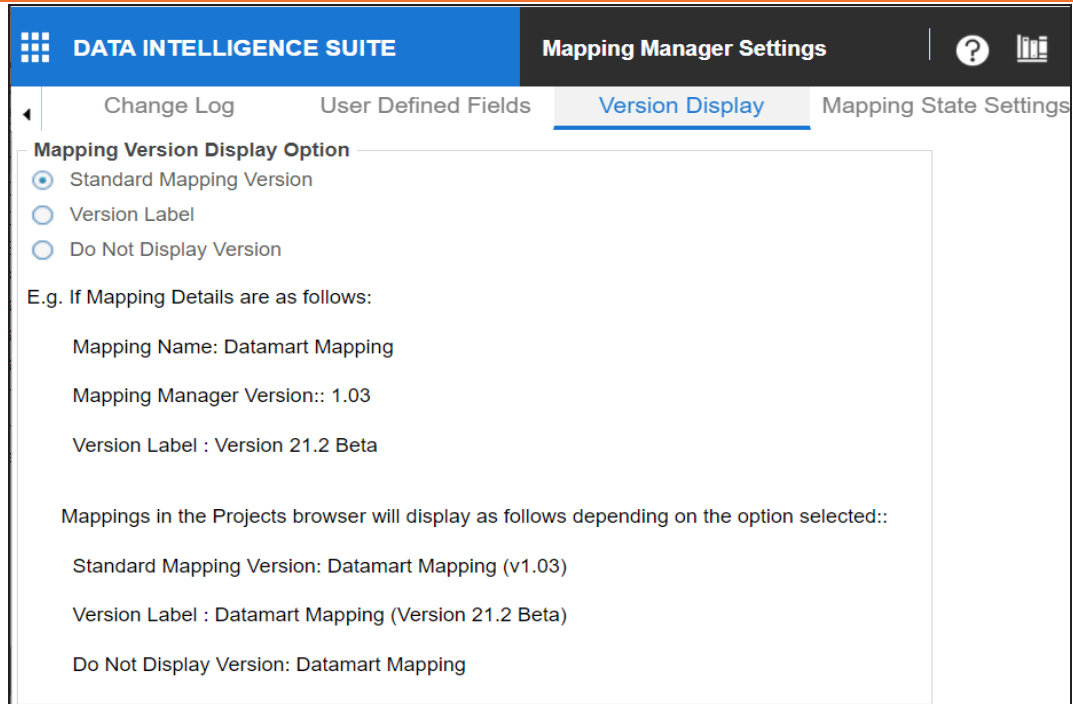
Version Label is specified while creating maps. You can also provide Version Label by [editing the Map Spec Overview tab](#).

To configure version display of maps, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click the **Version Display** tab.

The following page appears.

Configuring Version Display



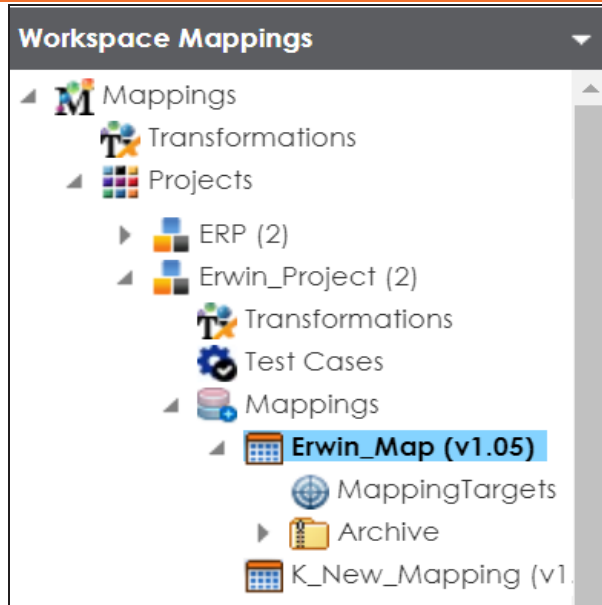
3. Use the following options:

Standard Mapping Version

To display the version of maps in standard mapping version, click **Standard Mapping Version**.

For example, the following image displays the map version in the standard mapping version form.

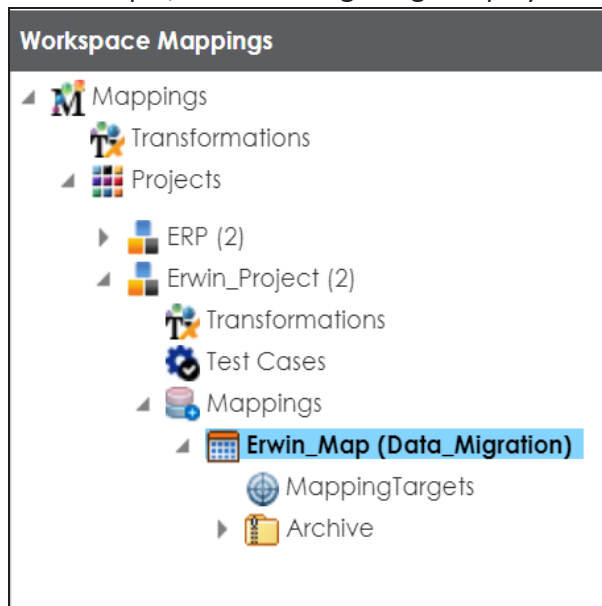
Configuring Version Display



Version Label

To display the version of maps using version label, click **Version Label**.

For example, the following image displays the map version with a version label.



Do Not Display Version

Configuring Version Display

To display maps without version, click **Do Not Display Version**.

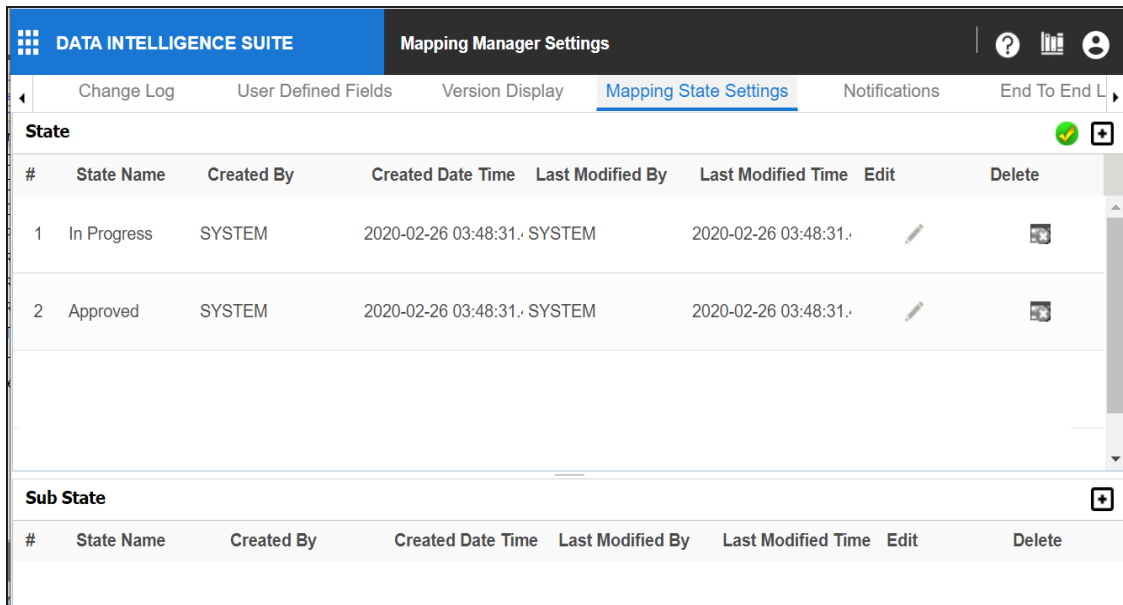
Configuring Mapping State Settings

By default, there are two mapping states, In Progress and Approved. You can configure new mapping states and sub-states for mapping specifications. Use these mappings states and sub-states to [update a mapping specification](#) in the Mapping Manager.

To configure mapping states, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click the **Mapping State Settings** tab.

The following page appears.



#	State Name	Created By	Created Date Time	Last Modified By	Last Modified Time	Edit	Delete
1	In Progress	SYSTEM	2020-02-26 03:48:31	SYSTEM	2020-02-26 03:48:31		
2	Approved	SYSTEM	2020-02-26 03:48:31	SYSTEM	2020-02-26 03:48:31		

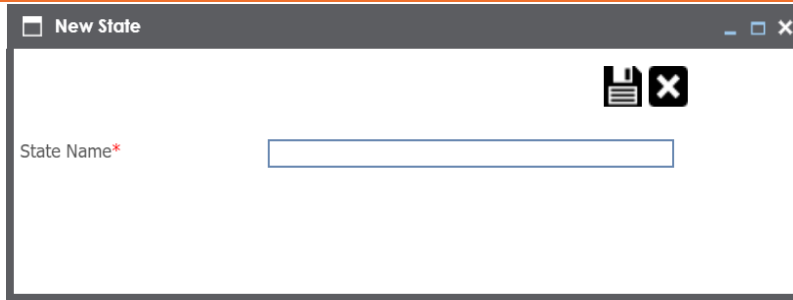
Sub State

#	State Name	Created By	Created Date Time	Last Modified By	Last Modified Time	Edit	Delete
---	------------	------------	-------------------	------------------	--------------------	------	--------

3. Click .

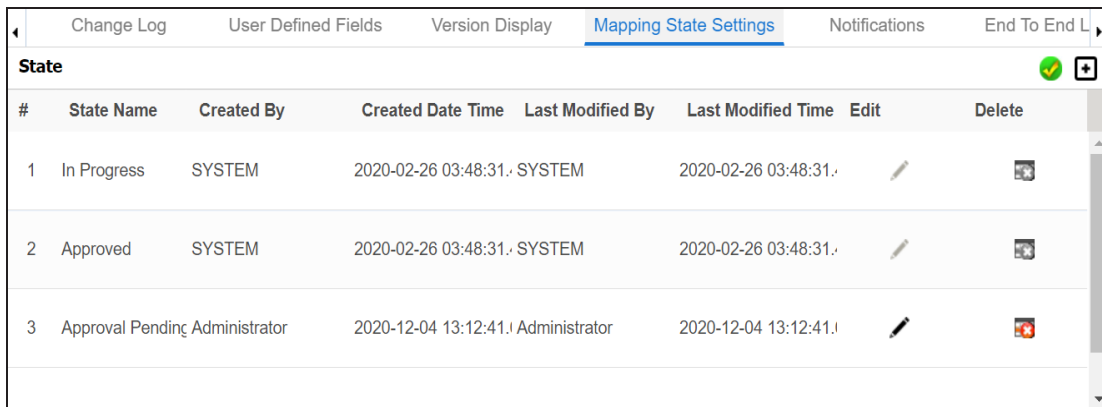
The New State page appears.







Configuring Mapping State Settings



4. Enter **State Name** and click .

The new mapping state is added to the mapping state list.



#	State Name	Created By	Created Date Time	Last Modified By	Last Modified Time	Edit	Delete
1	In Progress	SYSTEM	2020-02-26 03:48:31.	SYSTEM	2020-02-26 03:48:31.		
2	Approved	SYSTEM	2020-02-26 03:48:31.	SYSTEM	2020-02-26 03:48:31.		
3	Approval Pending	Administrator	2020-12-04 13:12:41.	Administrator	2020-12-04 13:12:41.		

Use the following options:

Edit 

You can update State Name.

Delete 

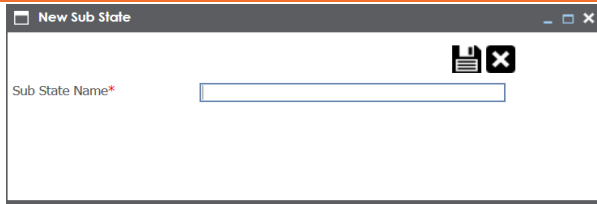
You can delete a mapping state that is no longer required.

To configure sub-states, follow these steps:

1. Under the **Sub State section**, click .

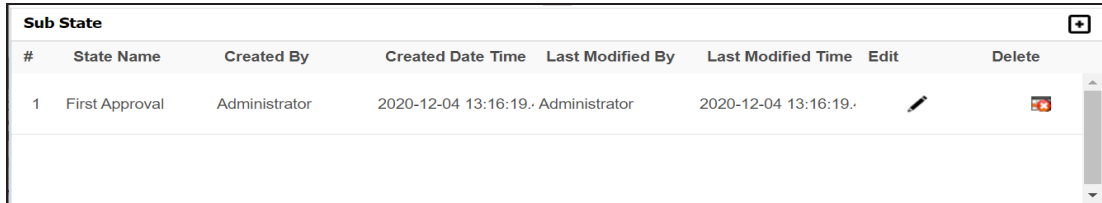
The New Sub State page appears.



Configuring Mapping State Settings



2. Enter **Sub State Name** and click .

The new sub-state is added to the sub-state list.



#	State Name	Created By	Created Date Time	Last Modified By	Last Modified Time	Edit	Delete
1	First Approval	Administrator	2020-12-04 13:16:19.	Administrator	2020-12-04 13:16:19.		

Use the following options:

Edit ()

You can update Sub State Name.

Delete ()

You can delete a mapping sub-state that is no longer required.

Configuring Notifications

An administrator can configure email notifications, which are sent to users on the following occasions:

- Creating new users
- Assigning maps to users
- Forgetting user credentials
- Creating new maps
- Updating mapping specifications
- Creating versions of maps
- Merging maps
- Copying and pasting maps
- Uploading mapping specification in XML
- Base-lining projects

Email notifications are sent from the administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

To configure notifications, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click the **Notifications** tab.

The following page appears.

Configuring Notifications

The screenshot shows the 'Mapping Manager Settings' window with the 'Notifications' tab selected. It displays two notification templates:

- New User Creation:**
 - Email Subject: Mapping Manager User Successfully Added - DO NOT REPLY
 - Email Body: Hello @UserFullName@, User @UserId@ has been successfully added to mapping manager with password @Password@. This user has been granted with role(s) @Roles@. The default role for this user is @DefaultRole@. Note: This is an auto generated email notification and this mailbox is not monitored. Please do not reply to this email.
- Mapping Assignments:**
 - Email Subject: Mapping Manager Assignment Status - DO NOT REPLY
 - Email Body: Hello, This is a system generated notice to inform you of a Mapping Status Change or Assignment. Mapping Details: Project Name: @projectName@ Mapping Name: @mapName@ Assignment Status Details:

3. Click .

4. Work on the following options:

New User Creation

Use this section to configure the email notification sent to a new user that you create in the Resource Manager.

Configure the following settings:

Email Subject: You cannot use a custom subject as the default subject cannot be edited.

Email Body: You can edit the default body content and use custom body content.

For more information on creating users, refer to the [Creating Users and Assigning Roles](#) topic.

Mapping Assignment

Use this section to configure email notifications to project users on assigning a map to users, or changing status of a map.

Use the following options:

Email Subject: You can edit the default email subject and use a custom email subject.

Email Body: You can edit the default body content, and use custom body content.

Configuring Notifications

For more information on mapping assignment, refer to the [Assigning Mapping Specifications to Users](#) topic.

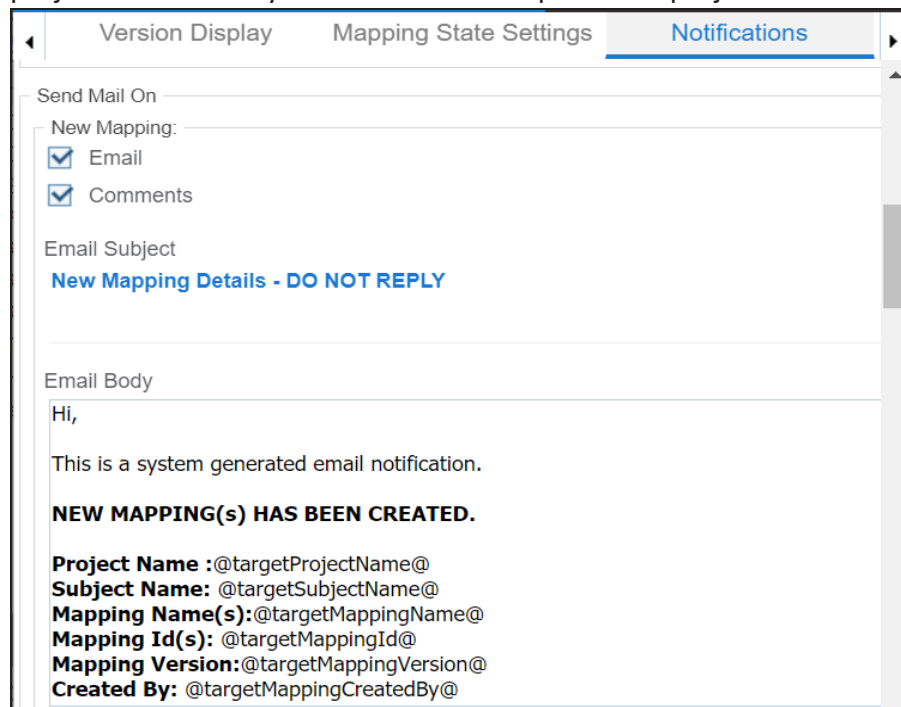
Forgot Password

Use this section to configure email notifications to users who forgot their User-name (User ID) or Password.

Email Subject: You can edit the default email subject and use a custom email subject.

Send Mail On

New Mapping: Use this section to send email notifications and comments to project users when you create a new map under a project.



The screenshot shows a configuration window with three tabs: "Version Display", "Mapping State Settings", and "Notifications". The "Notifications" tab is active. Under the "Send Mail On" section, there are two checked checkboxes: "Email" and "Comments". Below these, the "Email Subject" field contains the text "New Mapping Details - DO NOT REPLY". The "Email Body" field contains the following text: "Hi, This is a system generated email notification. **NEW MAPPING(S) HAS BEEN CREATED.** **Project Name :**@targetProjectName@ **Subject Name:** @targetSubjectName@ **Mapping Name(s):**@targetMappingName@ **Mapping Id(s):** @targetMappingId@ **Mapping Version:**@targetMappingVersion@ **Created By:** @targetMappingCreatedBy@".

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while creating a map, select the **Comments** check box.

Configuring Notifications

Email Subject: You can edit the default email subject and use the custom email subject.

Email Body: You can edit the default body content and use custom body content.

For more information on creating maps, refer to the [Creating Maps](#) topic.

Save Mapping: Use this section to send email notifications and comments to project users on updating a mapping specification grid.

Project Name:	@targetProjectName@
Subject Name:	@targetSubjectName@
Mapping Name:	@targetMappingName@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

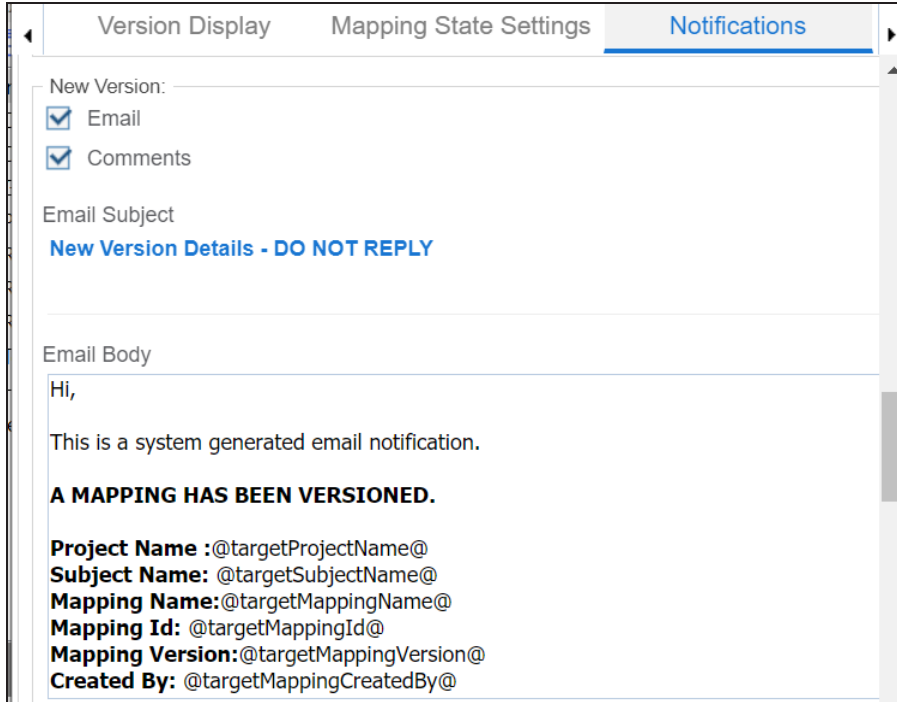
Comments: You can use this check box only when the Email check box is selected. To include comments entered under the Mapping Spec Row Comments column, select the **Comments** check box.

Email Subject: You can edit the default email subject and use a custom email subject.

Email Body: You can edit the default body content and use custom body content.

Configuring Notifications

New Version: Use this section to send email notifications and comments to project users on creating a new version of a map under a project.



The screenshot shows a configuration window with three tabs: 'Version Display', 'Mapping State Settings', and 'Notifications'. The 'Notifications' tab is active. Under the heading 'New Version:', there are two checked checkboxes: 'Email' and 'Comments'. Below these is the 'Email Subject' field, which contains the text 'New Version Details - DO NOT REPLY'. The 'Email Body' field contains the following text: 'Hi, This is a system generated email notification. **A MAPPING HAS BEEN VERSIONED.** Project Name :@targetProjectName@ Subject Name: @targetSubjectName@ Mapping Name:@targetMappingName@ Mapping Id: @targetMappingId@ Mapping Version:@targetMappingVersion@ Created By: @targetMappingCreatedBy@'.

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while creating a new version of a map, select the **Comments** check box.

Email Subject: You can edit the default email subject and use a custom email subject.

Email Body: You can edit the default body content and use custom body content.

For more information on creating versions of maps, refer to the [Creating Versions of Maps](#) topic.

Merge: Use this section to send email notification and comments to project users on merging a map with a parent map under a project.

Configuring Notifications

Version Display Mapping State Settings **Notifications**

Merge:

Email

Comments

Email Subject

Merged Mapping Details - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

A MAPPING HAS BEEN MERGED WITH UPDATES FROM ANOTHER MAPPING.

DETAILS	ORIGIN	DESTINATION
Project Name:	@sourceProjectName@	@targetProjectName@
Subject Name:	@sourceSubjectName@	@targetSubjectName@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while merging a map, select the **Comments** check box.

Email Subject: You can edit the default email subject and use a custom email subject.

Email Body: You can edit the default body content and use custom body content.

For more information on branching and merging a map, refer to the [Branching and Merging Mappings](#) section.

Copy/Paste : Use this section to send email notification and comments to project users on creating a copy of a map under a project.

Configuring Notifications

DETAILS	ORIGIN	DESTINATION
Project Name:	@sourceProjectName@	@targetProjectName@
Subject Name:	@sourceSubjectName@	@targetSubjectName@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while pasting a map, select the **Comments** check box.

Email Subject: You can edit the default email subject and use a custom email subject.

Email Body: You can edit the default body content and use custom body content.

For more information on copying and pasting a map, refer to the [Branching Mappings](#) topic.

Upload XML : Use this section to send email notifications and comments to project users on uploading map in XML. To send comments entered while uploading an XML map, select the **Comments** check box.

Configuring Notifications

Version Display Mapping State Settings **Notifications**

Upload XML:

Email

Comments

Email Subject

XML Mapping Details - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

A MAPPING HAS BEEN CREATED USING THE XML UPLOAD FUNCTIONALITY.

Project Name :@targetProjectName@

Subject Name: @targetSubjectName@

Mapping Name:@targetMappingName@

Mapping Id: @targetMappingId@

Mapping Version:@targetMappingVersion@

Created By: @targetMappingCreatedBy@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while uploading a map in XML, select the **Comments** check box.

Email Subject: You can edit the default email subject and use a custom email subject.

Email Body: You can edit the default body content and use custom body content.

For more information on uploading a map in XML, refer to the [Uploading Mapping Specifications in XML](#) topic.

Baseline : Use this section to send email notifications and comments to project users on base-lining a project.

Configuring Notifications

Baseline:

Email

Comments

Email Subject

Project Baseline Details - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

A NEW PROJECT BASELINE HAS BEEN INITIATED.

Project Name :@targetProjectName@
Baseline Version: @targetBaselineVersion@
Project Created By: @projectCreatedBy@
Project Created On:@projectCreatedDate@
Project Baselined By:@projectBaselinedBy@
Project Baselined On: @projectBaselinedOn@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while base-lining a project, select the **Comments** check box.

Email Subject: You can edit the default email subject and use a custom email subject.

Email Body: You can edit the default body content and use custom body content.

For more information on base-lining a project, refer to the [Base-lining Projects](#) topic.

Configuring Metadata Manager

On the Metadata Manager Settings page, you can set up the Metadata Manager with respect to:

- [Table and column class](#): Under this, you can configure table and column classes.
- [Notification](#): Under this, you can configure email notifications about the metadata scan jobs.
- [Version display](#): Under this, you can configure version display of environments.
- [Data Quality Notification](#) and [Settings](#): Under this, you can configure email notifications about the data profiling job and set data profiling parameters.
- [Data access/preview settings](#): Under this, you can enforce credentials for data access/preview.

To access Metadata Manager Settings, go to **Application Menu > Settings > Metadata Manager**.

The Metadata Manager Settings page appears:

Table Class								
#	Table Class	Table Class Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete

Column Class								
#	Column Class	Column Class Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete



You can set up the Metadata Manager with respect to [user defined fields](#) on the Mapping Manager Settings page.

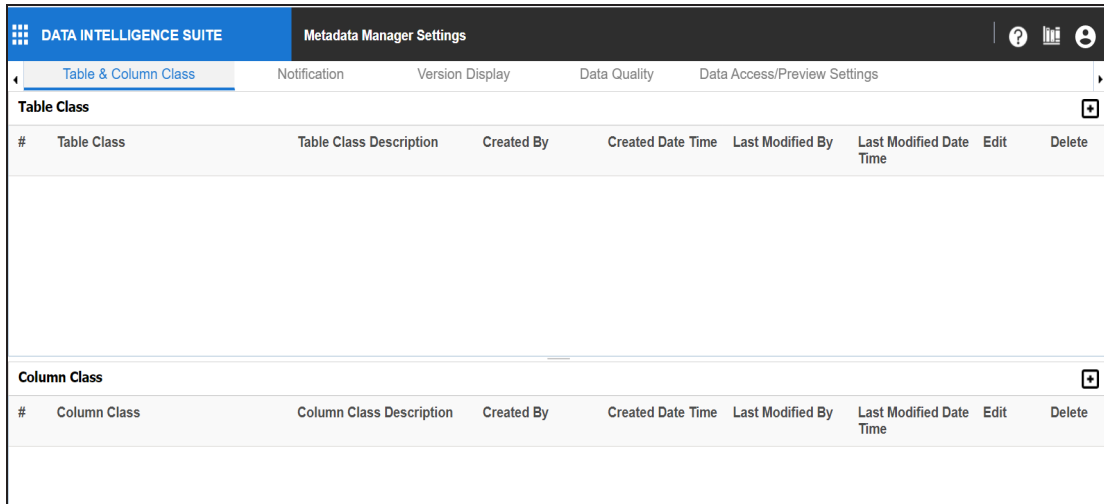
Configuring Table and Column Classes

Table and column properties include the table and column classes. You can configure your own table and column classes depending on your requirements.

To configure table classes, follow these steps:

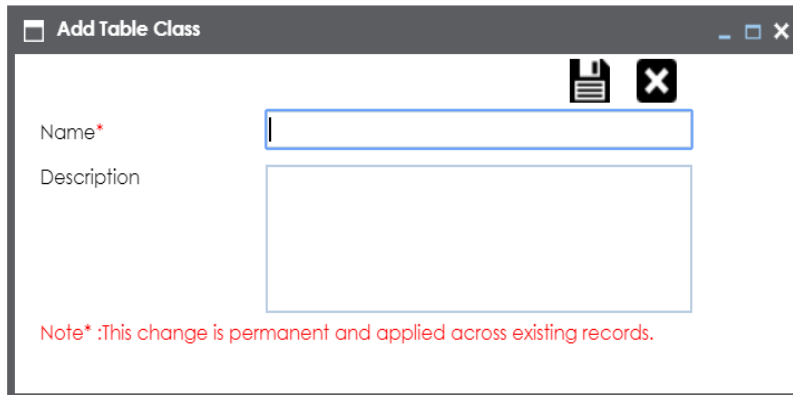
1. Go to **Application Menu > Settings > Metadata Manager**.

The Metadata Manager Settings page appears and by default the Table & Column Class tab opens.



2. Under the **Table Class** section, click .

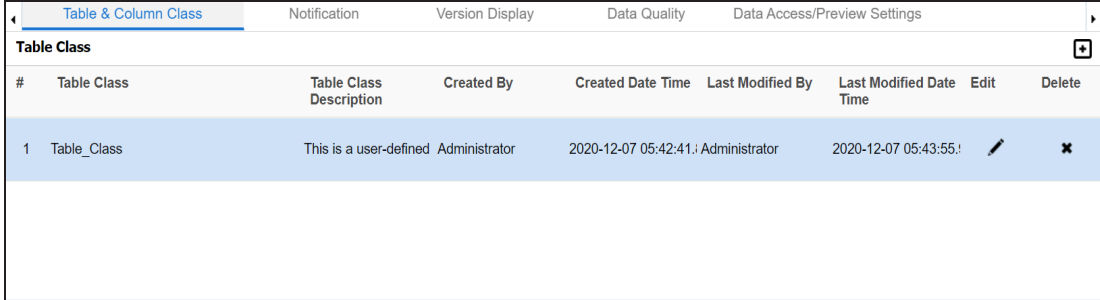
The Add Table Class page appears.





Configuring Table and Column Classes

3. Enter the Name and Description of the table class.
4. Click .


The table class is created and saved in the Table Class grid.




#	Table Class	Table Class Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Table_Class	This is a user-defined	Administrator	2020-12-07 05:42:41: Administrator		2020-12-07 05:43:55:!		

5. Use the following options:

Edit 

To edit the table class, click .

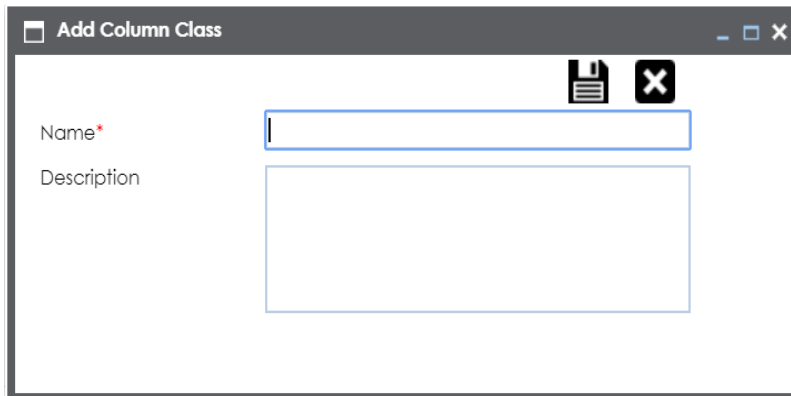
Delete 

To delete the table class, click .

To configure column classes, follow these steps:

1. Under the **Column Class** section, click .



The Add Column Class page appears.



Add Column Class

Name*

Description



 

2. Enter the Name and the Description of the column class.

Configuring Table and Column Classes


3. Click .

The column class is created and saved under the Column Class grid.

Column Class								
#	Column Class	Column Class Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Column_Class	This is a user-defined	Administrator	2020-12-07 05:47:21:	Administrator	2020-12-07 05:47:21:		

4. Use the following options:

Edit 

To edit the column class, click .

Delete 

To delete the column class, click .

You can update table and column properties in the Metadata Manager using the table and column classes.

For more information on updating table properties, refer to the [Updating Table Properties](#) topic.

For more information on column properties, refer to the [Updating Column Properties](#) topic.

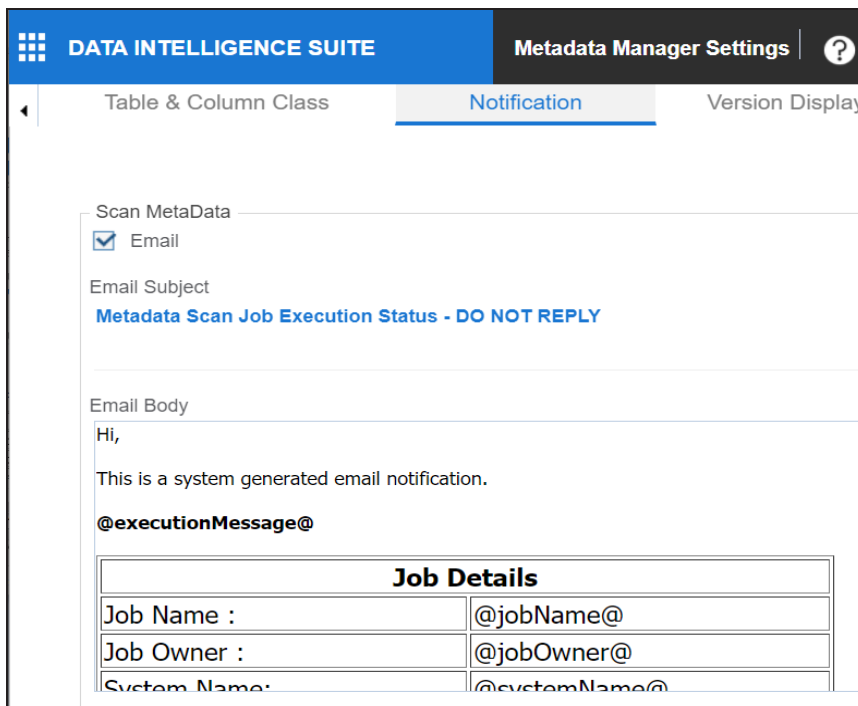
Configuring Notifications on Scanning Metadata

You can configure email notifications to users when they schedule metadata scan. The users receive email notifications from the [Admin Email Id](#) when you enable email notifications.

To configure notifications, follow these steps:


1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click the **Notification** tab.

The following page appears.



The screenshot shows the 'Metadata Manager Settings' page with the 'Notification' tab selected. The 'Scan MetaData' section has the 'Email' checkbox checked. The 'Email Subject' is 'Metadata Scan Job Execution Status - DO NOT REPLY'. The 'Email Body' contains a greeting and a system-generated notification with a table of job details.

Job Details	
Job Name :	@jobName@
Job Owner :	@jobOwner@
System Name :	@systemName@

3. Click .
4. Use the following options in the Scan Metadata section:

Email

Select the check box to turn on email notifications to users.

Email Subject

Configuring Notifications on Scanning Metadata

You can edit the default email subject and use a custom email subject.

Email Body

You can edit the default body content and use custom body content.

5. Click .

The email notification is configured.

For more information on scheduling a metadata scan, refer to the [Scheduling Metadata Scans](#) topic.

Configuring Version Display

You can display the environment version in two ways:

1. **Standard Environment Version:** This option displays the version of the environment in a standard form.

For example, Data_Migration (v.1.00), where Data_Migration is the environment name and 1.00 is the environment version.

2. **Version Label:** This option displays the version of the environment using a version label.

For example, Data_Migration (erwin_Metadata), where Data_Migration is the environment name and erwin_Metadata is the version label.

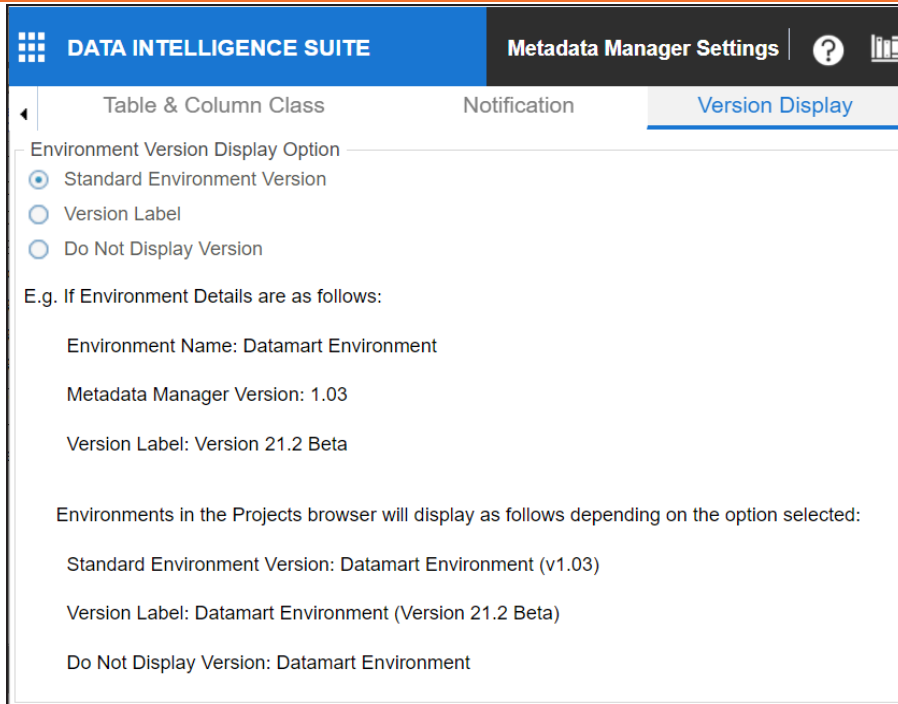
Version Label is specified while creating environments. You can also provide version label by editing environments. For more information on using version label, refer to the [Creating Environments](#).

To configure version display of environments, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click **Version Display**.

The following page appears.

Configuring Version Display



3. Use the following options:

Standard Environment Version

To display the version of environments in the standard environment version, select **Standard Environment Version**.

Version Label

To display the version of environments using version label, select **Version Label**.

Do Not Display Version

To display environments without version, select **Do Not Display Version**.

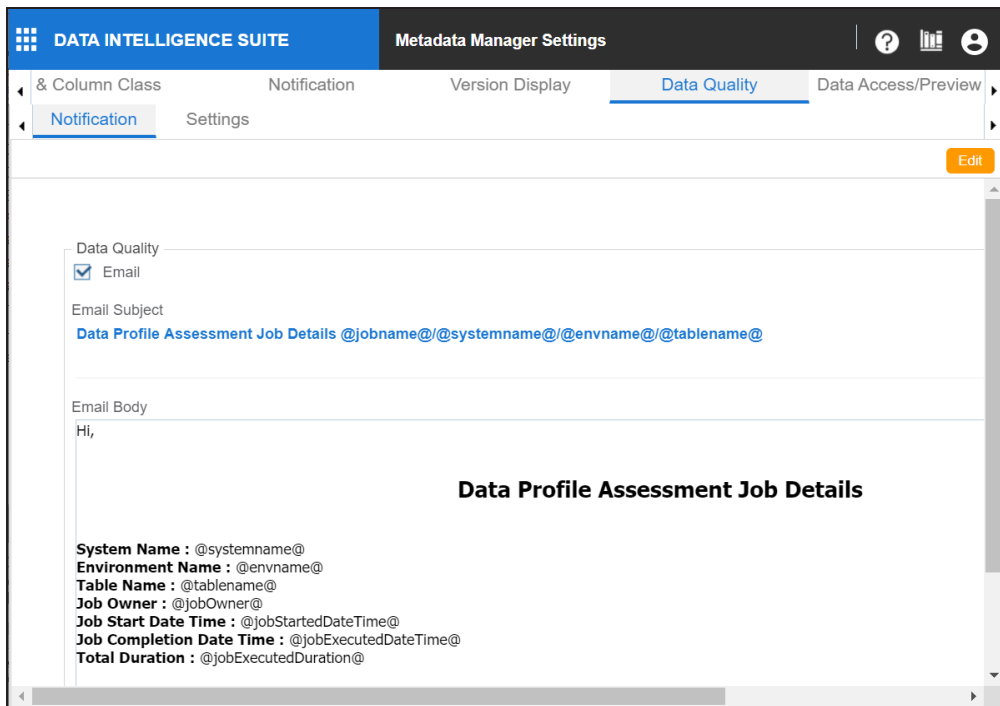
Configuring Notifications on Profiling Data

You can schedule data profiling job and assess the data quality in the Metadata Manager. You can also configure email notifications to notify users about the data profiling jobs. The users receive email notifications from the administrator's email ID, configured in the [Email Settings](#).

To configure email notifications on profiling data, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click the **Data Quality** tab and then click the **Notification** tab.

The following page appears.



3. Click **Edit**.
4. Use the following options in the Data Quality section:

Email

Select the check box to turn on email notifications to users.

Configuring Notifications on Profiling Data

Email Subject

You can edit the default email subject and use a custom email subject.

Email Body

You can edit the default body content and use custom body content.

5. Click **Save**.

The email notification is configured.

For more information on scheduling data profile job, refer to the [Profiling Data at Table Level](#) topic.

Configuring Data Profiling and DQ Scores

You can configure data quality (DQ) score options and data profiling parameters.

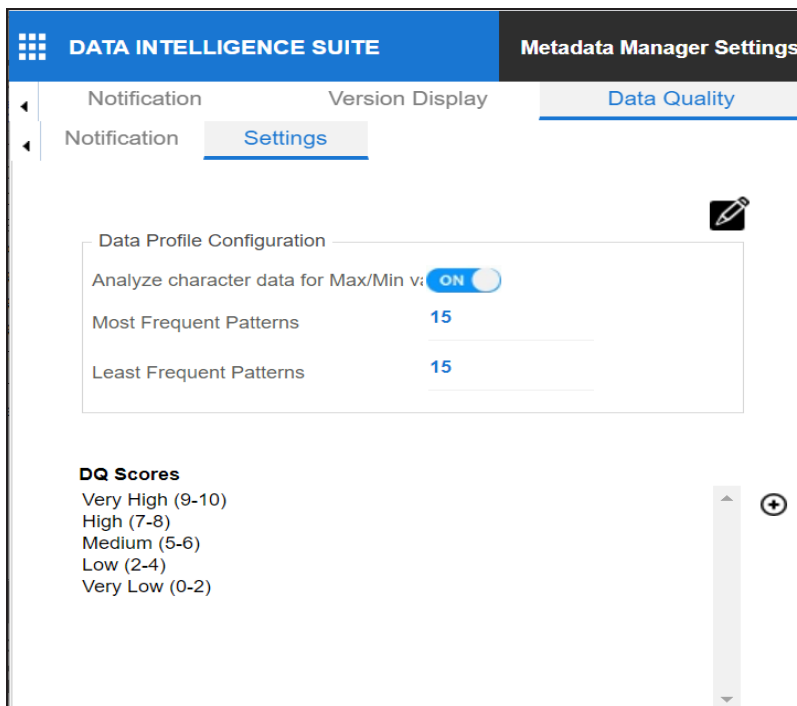
Configuring data profiling parameters involves specifying:

- Whether data profiling requires to analyze character data for maximum and minimum
- Most frequent patterns
- Least frequent patterns

To configure data profiling parameters, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click the **Data Quality** tab and then, click the **Settings** tab.

The following page appears.



3. Click .

4. Use the following options:

Analyze character data for Max/Min

This option specifies whether the data profiling requires to analyze character data for maximum and minimum. Turn the **Analyze character data for Max/Min** to **ON** to analyze character data for maximum or minimum.

Most Frequent Patterns

This option specifies the number of top most frequent patterns to be displayed in the Data Profiling Pattern Summary report. To set the number of top most frequent patterns for display, type the number in the **Most Frequent Patterns** box. For example, if you type the number 3 in the box, then top three most frequent patterns would be displayed in the report.

Least Frequent Patterns

This option specifies the number of bottom least frequent patterns to be displayed in the Data Profiling Pattern Summary report. To set the number of bottom least frequent patterns for display, type the number in the **Least Frequent Patterns** box.

For example, if you type the number 3 in the box, then bottom three least frequent patterns would be displayed in the report.

To configure DQ score option, follow these steps:

1. Under the **DQ Scores** section, click .

The DQ Score Options page appears.

Configuring Data Profiling and DQ Scores

DQ Score Options		
+		
Key	Value	Publish
Very High (9-10)	Very High (9-10)	<input checked="" type="checkbox"/>
High (7-8)	High (7-8)	<input checked="" type="checkbox"/>
Medium (5-6)	Medium (5-6)	<input checked="" type="checkbox"/>
Low (2-4)	Low (2-4)	<input checked="" type="checkbox"/>
Very Low (0-2)	Very Low (0-2)	<input checked="" type="checkbox"/>

2. Click .

A new row is added in the DQ Score Options grid.

3. Double-click the cell under the **Key** column to enter the key.
4. Double-click the cell under the **Value** column to enter the value.



Turn **Publish** to **OFF** to remove the DQ score option from the DQ Scores list.

5. Click .

The DQ Score option is added to the DQ Scores list.

You can schedule data profiling job and assess the data quality in the Metadata Manager. For more information on profiling data, refer to the [Profiling Data at Table Level](#) topic.

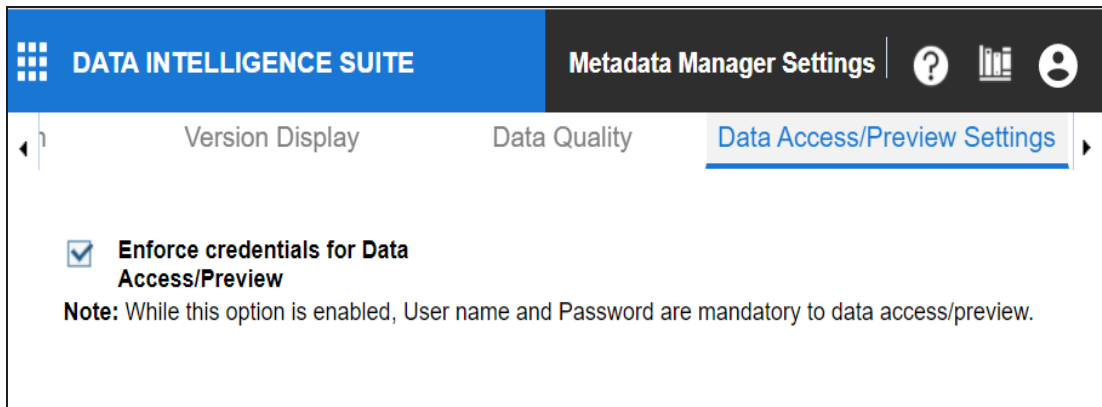
Enforcing Credentials for Data Access or Preview

You can enforce user credentials for previewing or accessing data from the database in the Metadata Manager.

To enforce user credentials to preview data from databases, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click the **Data Access/Preview Settings** tab.

The following page appears.



3. Select the **Enforce credentials for Data Access/Preview** check box to enforce user credentials for accessing or previewing the data.

For more information on previewing the data, refer to the [Previewing Data](#) topic.

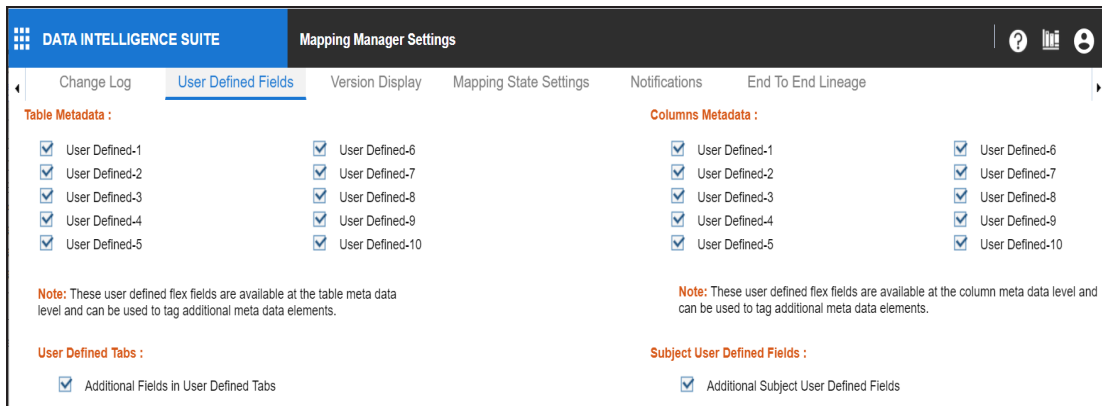
Displaying User Defined Fields

You can display user defined fields in the Table Properties tab and Column Properties tab.

To display user defined fields, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click **User Defined Fields**.

The following page appears.



3. Use the following options:

Table Metadata

To display a user defined field in the **Table Properties** tab, select the corresponding check box. For example, select **User Defined1** check box to display the User Defined1 field in the Table Properties tab.

Columns Metadata

To display a user defined field in the **Column Properties** tab, select the corresponding check box. For example, select the **User Defined1** check box to display the User Defined1 field in the Column Properties tab.

Configuring Codeset Manager

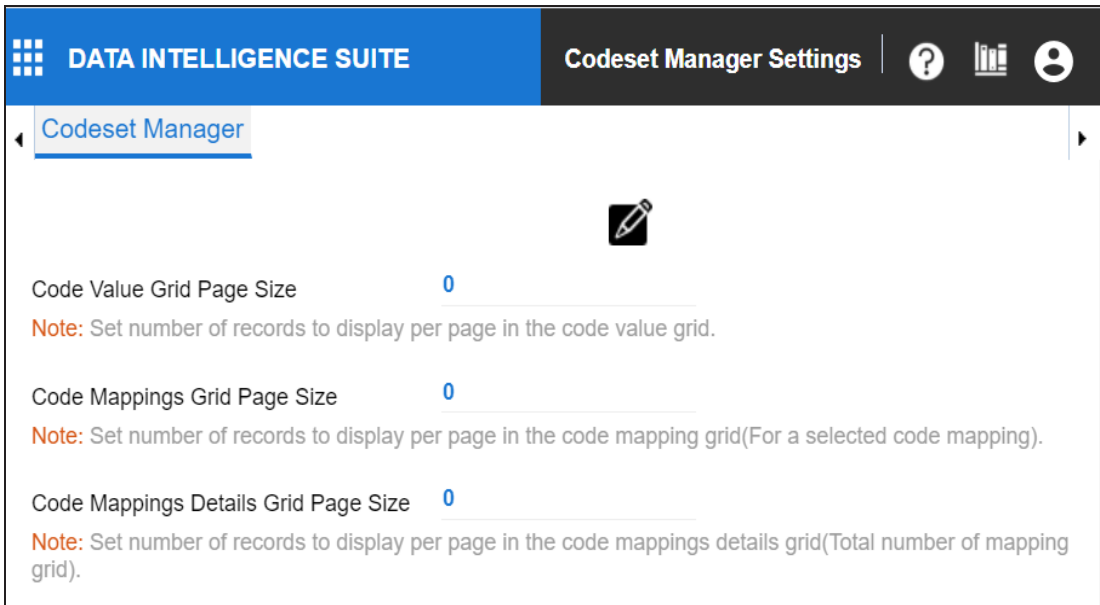
You can configure number of records per page in the Codeset Manager for:

- Code value grid
- Code mappings grid
- Code mappings details grid

To configure number of records per page in the Codeset Manager, follow these steps:

1. Go to **Application Menu > Settings > Codeset Manager**.

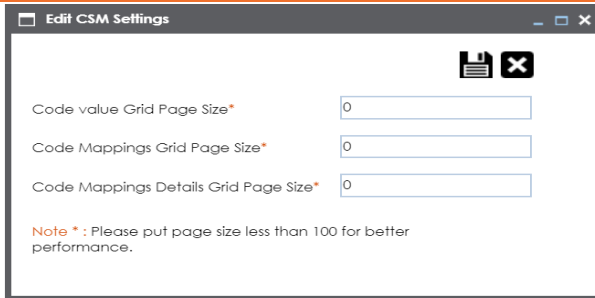
The following page appears.



2. Click .

The Edit CSM Settings page appears.

Configuring Codeset Manager



3. Use the following options:

Code value Grid Page Size

Set the number of records to display per page in the code value grid.

Code Mappings Grid Page Size

Set the number of records to display per page in the code mapping grid.




This is for the selected code mappings.

Code Mappings Details Grid Page Size

Set the number of records to display per page in the code mappings details grid.

Save ()

To save the page sizes, click .

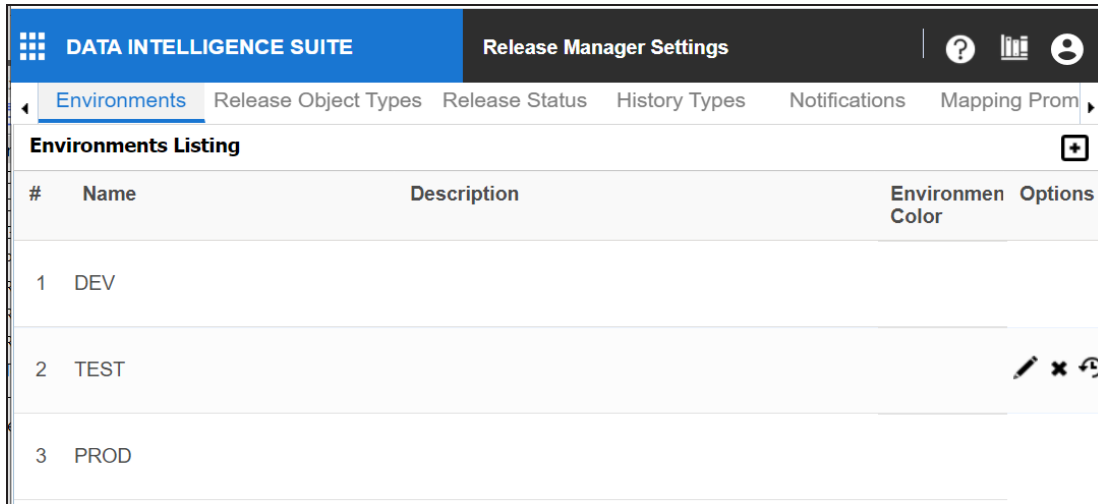
Configuring Release Manager

The Release Manager Settings page enables to set up Release Manager with respect to:

- [Release object types](#): Under this, you can add a new release object type under the Miscellaneous Objects.
- [Environments for release objects](#): Under this, you can configure environments for release objects.
- [Release and release object statuses](#): Under this, you can maintain list of release and release object statuses.
- [History types](#): Under this, you can configure history types in a History Listing Grid that can be used for activity logs in the Release Manager.
- [Notifications about release objects](#): Under this, you can configure email notifications to a team member about a release object.

To access Release Manager Settings, go to **Application Menu > Settings > Release Manager**.

The Release Manager Settings page appears:



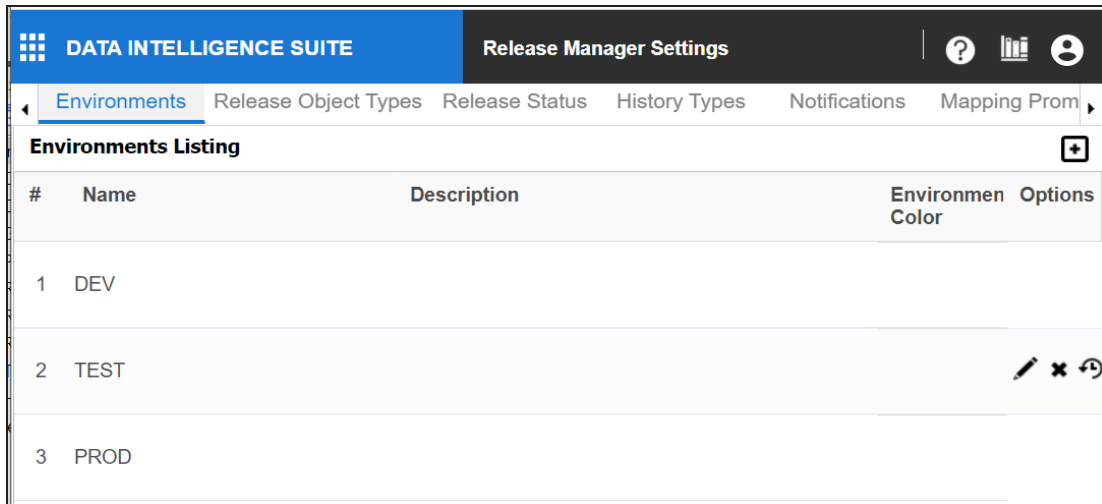
Configuring Environments for Release Objects

You can configure environments for release objects in the Release Manager. DEV and PROD are the two default environments available which cannot be edited or deleted.

To configure environments for release objects, follow these steps:

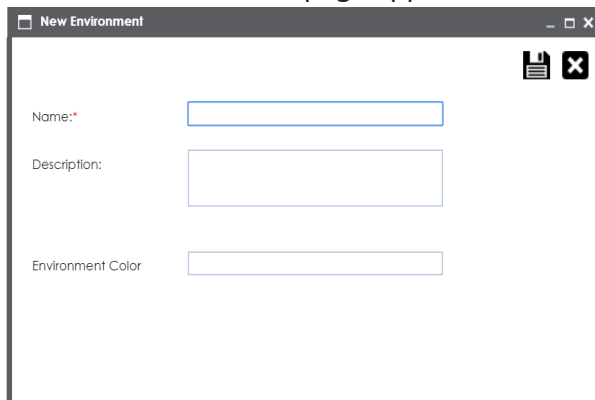
1. Go to **Application Menu > Miscellaneous > Settings > Release Manager**.

The following page appears.



2. Click .

The New Environment page appears.



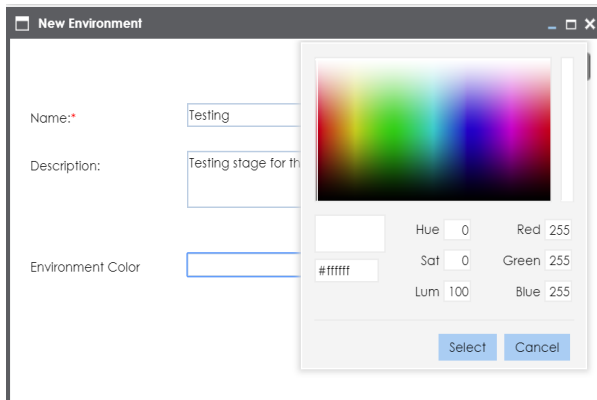
The 'New Environment' form contains the following fields:

- Name:
- Description:
- Environment Color:

3. Enter the Name and Description.

Configuring Environments for Release Objects

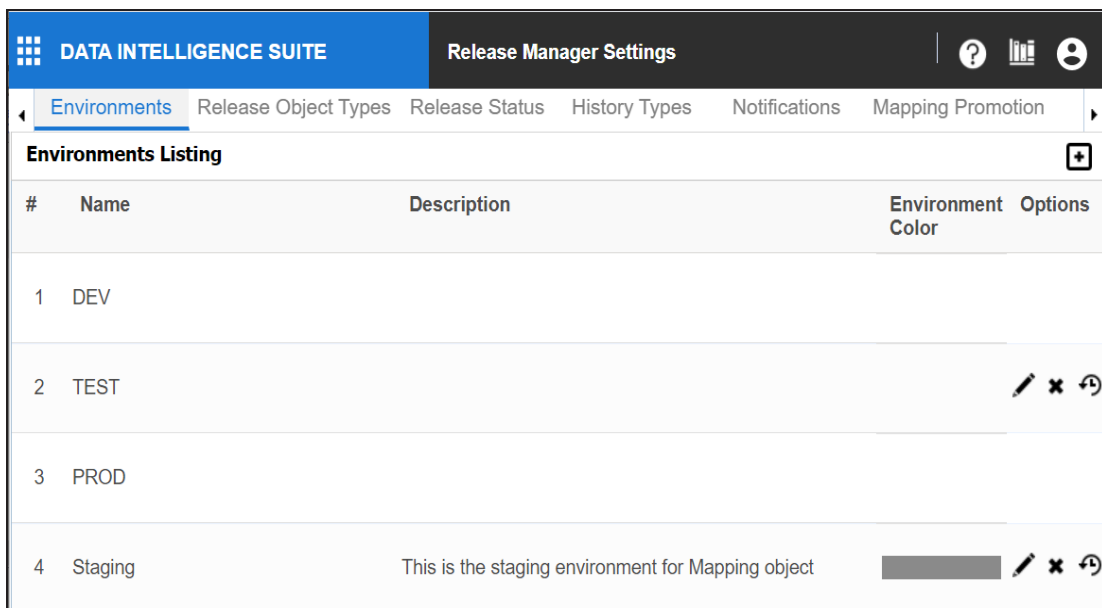
4. Choose Environment Colour.



5. Click **Select**.

6. Click .


The environment is added.




Edit

To edit the environment, click .

Delete

To delete the environment, click .

History

To view history details, click 

Configuring Release Object Types

The Release Manager comes with three default release object types:

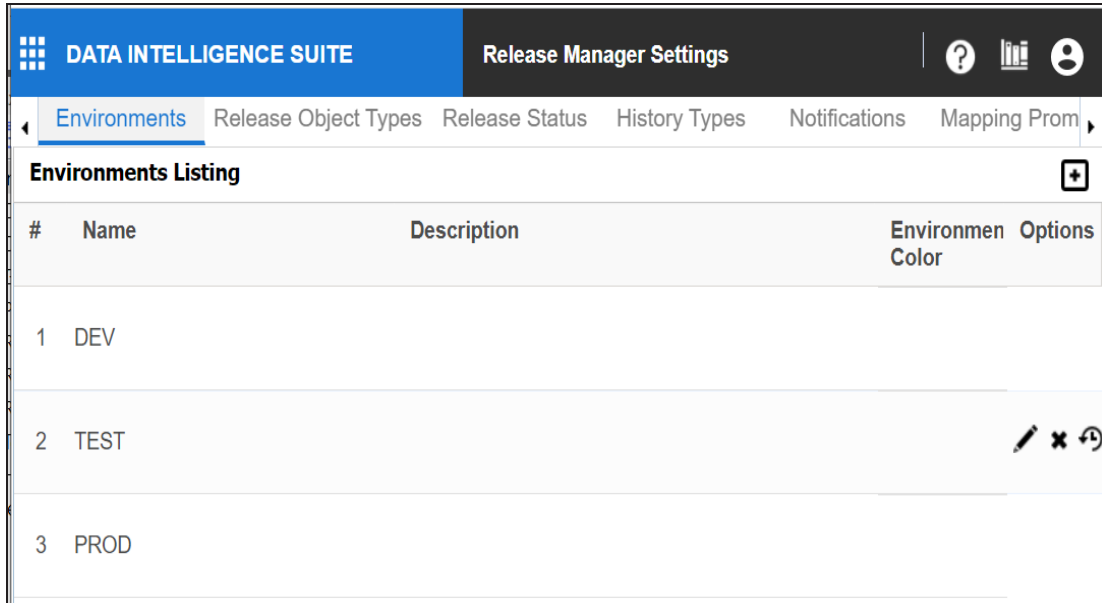
1. Data Item Mapping
2. Codeset
3. Code Mappings

You can add new release object types under the Miscellaneous Objects.

To add new release object types, follow these steps:

1. Go to **Application Menu > Miscellaneous > Settings > Release Manager**.

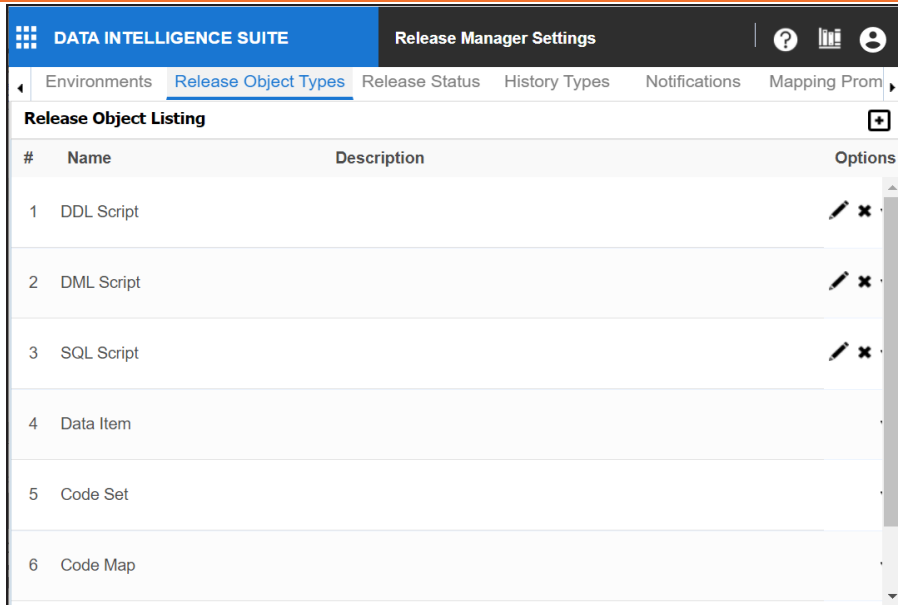
The following page appears.



2. Click the **Release Object Types** tab.

The Release Object Listing appears. Data Item, Code Set, Code Map are the default release object types, which can not be edited or deleted.

Configuring Release Object Types



3. Click .

The New Release Object Type page appears.

4. Enter the Name and the Description of the release object type.

5. Click .

The new release object type is added and can be accessed under Miscellaneous Objects.

Use the following options:

Edit

To edit the release object type, click .

Delete

To delete the release object type, click .

History

To view history details, click .

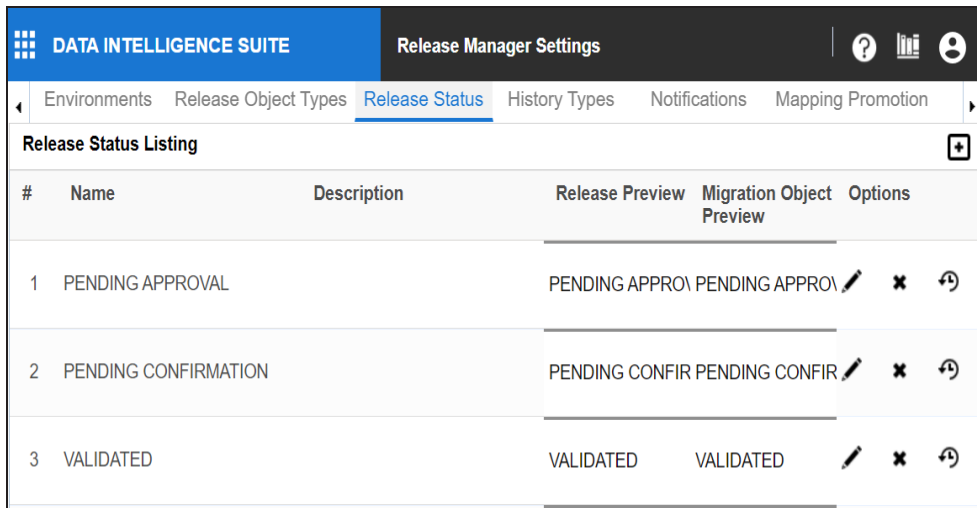
Configuring Release and Release Object Statuses

You can create multiple release and release object statuses to manage your releases in the Release Manager.

To configure release status and release object status, follow these steps:

1. Go to **Application Menu > Miscellaneous > Settings > Release Manager**.
2. Click Release Status.

The Release Status Listing appears.



The screenshot shows the 'Release Manager Settings' page in the 'DATA INTELLIGENCE SUITE'. The 'Release Status' tab is selected, displaying a table titled 'Release Status Listing'. The table has columns for '#', 'Name', 'Description', 'Release Preview', 'Migration Object Preview', and 'Options'. Three rows are visible: '1 PENDING APPROVAL', '2 PENDING CONFIRMATION', and '3 VALIDATED'. Each row includes edit, delete, and refresh icons in the 'Options' column.

#	Name	Description	Release Preview	Migration Object Preview	Options
1	PENDING APPROVAL		PENDING APPROV	PENDING APPROV	✎ ✕ ↺
2	PENDING CONFIRMATION		PENDING CONFIR	PENDING CONFIR	✎ ✕ ↺
3	VALIDATED		VALIDATED	VALIDATED	✎ ✕ ↺

3. Click  to define a new status.

The New Release Status page appears.

Configuring Release and Release Object Statuses

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

Field Name	Sub-Field	Description
Status Title		Enter a small description of the release object.
Description		Live Date is autofilled and it is same as the live date of the release.
		Enter the Live Time in HH : MM format.
Release Status	Text Colour	Click the cell and select the required text colour for the Release Status.
	Background	Click the cell and select the required background colour for the Release Status.
	Border Color	Click the cell and select the required border colour for the Release Status.
	Border Type	Select the required border type for the Release Status.
	Preview	You can view the preview of the release status based on your above selections.
Migration Object	Text Colour	Click the cell and select the required text colour for the

Configuring Release and Release Object Statuses

Field Name	Sub-Field	Description
Status		Object Status.
	Background	Click the cell and select the required background colour for the Object Status.
	Border Colour	Click the cell and select the required border colour for the Object Status.
	Border Type	Select the required border type for the Object Status.
	Preview	You can view the preview of the release status based on your above selections.

5. Click .

The new release/release object status is created and saved in the Release Status Listing.

Use the following options:

Edit

To edit the release status, click .

Delete

To delete the release status, click .

History

To view history details, click .

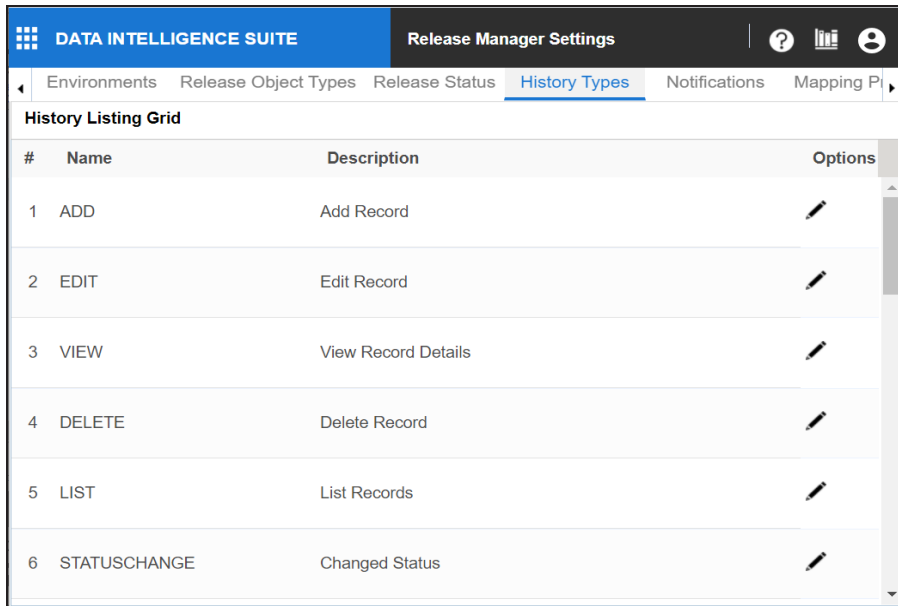
Configuring History Types







You can manage your activity logs in the Release Manager by configuring history types as per your requirements.

To configure history types, follow these steps:

1. Go to **Application Menu > Miscellaneous > Settings > Release Manager**.
2. Click **History Types**.

The History Listing Grid page appears.

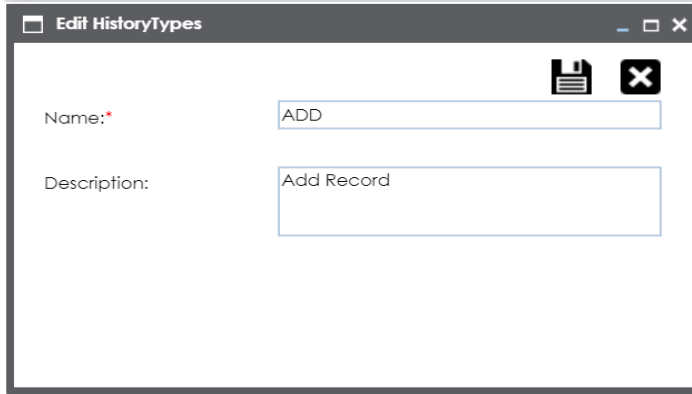


#	Name	Description	Options
1	ADD	Add Record	
2	EDIT	Edit Record	
3	VIEW	View Record Details	
4	DELETE	Delete Record	
5	LIST	List Records	
6	STATUSCHANGE	Changed Status	


3. To edit the description, click .

The Edit History Types page appears.

Configuring History Types



The screenshot shows a window titled "Edit HistoryTypes". In the top right corner of the window, there are icons for a save function (a floppy disk) and a close function (an 'X'). The main area of the window contains two text input fields. The first field is labeled "Name:*" and contains the text "ADD". The second field is labeled "Description:" and contains the text "Add Record".

4. Edit the Description and click .

The description is saved in the History Listing Grid.

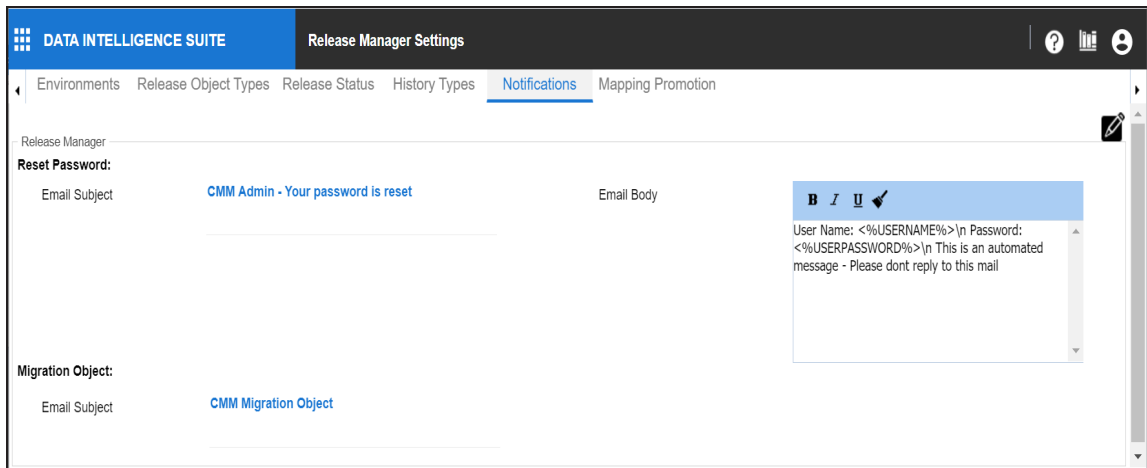
Configuring Notifications about Release Objects


You can send email notifications to your team members after adding a release object to a release in the Release Manager.

To configure notifications about release objects, follow these steps:

1. Go to **Application Menu > Miscellaneous > Settings > Release Manager**.
2. Click **Notifications**.

The following page appears.



3. Click .
4. In **Migration Object**, type the format of the email subject.

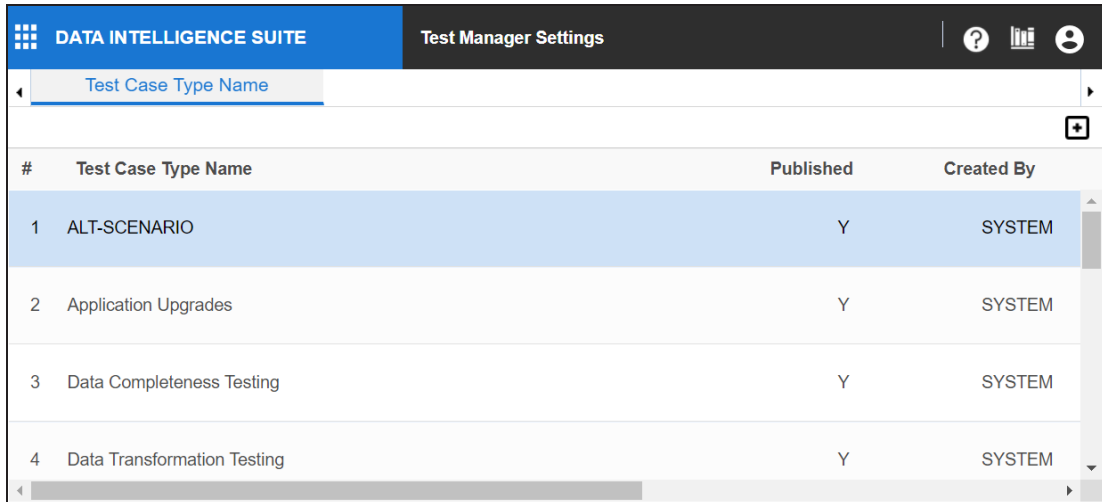
This email is used to send notifications to any concerned team member from the Admin Email Id which can be configured in [Email Settings](#).

Configuring Test Manager

You can add types of test cases as per your requirements. The list appears as option while creating test cases in the Metadata Manager and the Mapping Manager.

To configure test case types, follow these steps:

1. Go to **Application Menu > Miscellaneous > Settings > Test Manager**.

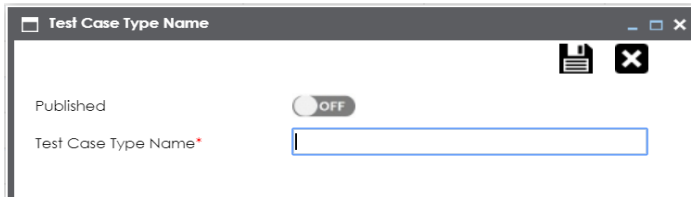


The screenshot shows the 'Test Manager Settings' window in the 'DATA INTELLIGENCE SUITE'. It features a search bar for 'Test Case Type Name' and a table with the following data:


#	Test Case Type Name	Published	Created By
1	ALT-SCENARIO	Y	SYSTEM
2	Application Upgrades	Y	SYSTEM
3	Data Completeness Testing	Y	SYSTEM
4	Data Transformation Testing	Y	SYSTEM

2. Click .

The following page appears.



The screenshot shows a configuration form titled 'Test Case Type Name'. It includes a 'Published' toggle switch currently set to 'OFF' and a text input field for 'Test Case Type Name'.

3. Type the Test Case Type Name and turn **Published** to **ON**.
4. Click .

The new test case type is added to the list.

Configuring Requirements Manager

The Requirements Manager Settings page enables you to set up the Requirements Manager with respect to:

- [Templates](#): Under this, you can create your own template and enrich it by adding artifacts to it. You can also design custom form for an artifact.
- [Email settings](#): Under this, you can configure email templates and trigger email notifications to project users when different operations are performed on a Specification, Artifact, and Specification Artifact or Child Artifact.
- [Version display](#): Under this, you can choose to display versions of specifications in two of the ways.

To access Requirements Manager, go to **Application Menu > Settings > Requirements Manager**. The Requirements Manager Settings page appears:

The screenshot shows the 'Requirements Manager Settings' page with the 'Templates' tab selected. On the left, there is a 'Specification Templates Workspa' sidebar with a tree view containing 'Specification Templates', 'Default', and 'TechPubs'. The main area displays a 'Templates Summary' table with columns for '#', 'Template Name', and 'Template Description'. The table lists two templates: 'Default' (ID 1) and 'TechPubs' (ID 2). There are also empty input fields for creating a new template.

#	Template Name	Template Description
1	Default	Default Template
2	TechPubs	

Creating Templates

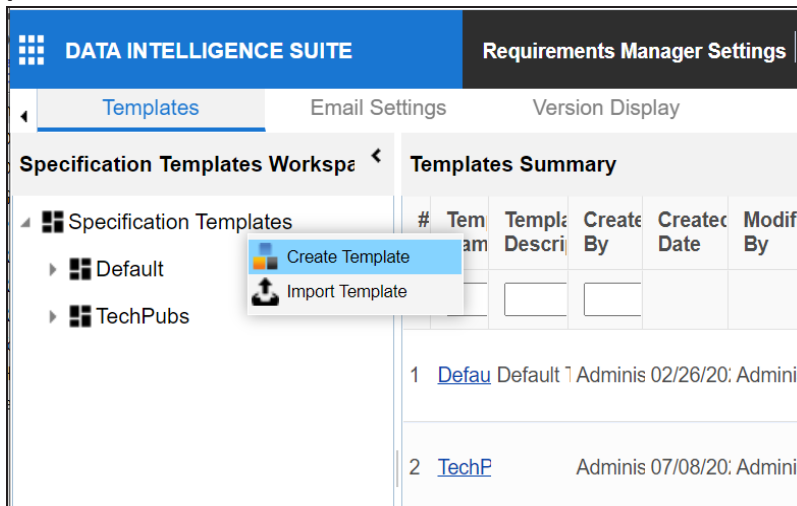
You can create customized requirement templates and use them to create requirement specifications.

To create templates, follow these steps:

1. Go to **Application Menu > Settings > Requirements Manager**.

The Requirements Manager Settings page appears. By default, the Templates settings open.

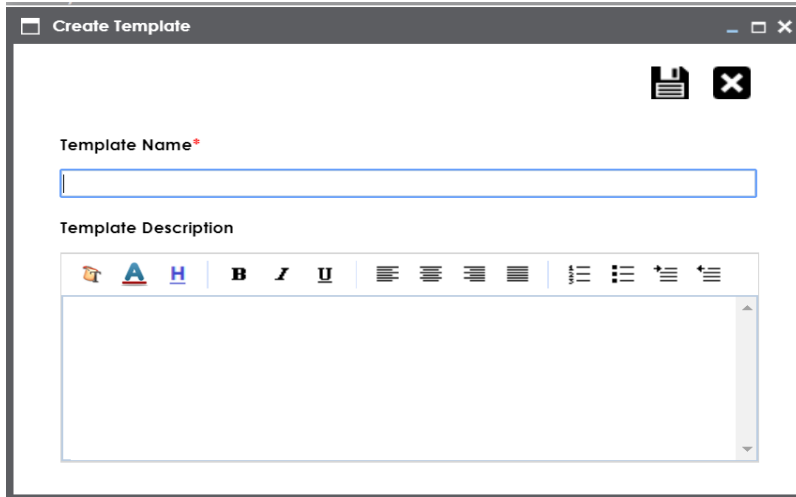
2. In the **Specification Templates Workspace** pane, right-click the **Specifications Templates** node.



3. Click **Create Template**.

The Create Template page appears.

Creating Templates



4. Enter **Template Name** and **Template Description**.

For example:

- **Template Name:** Health Migration Template
- **Template Description:** This is a template to capture requirements of the health migration project.

5. Click .

The template is created and saved in the Specifications Templates tree.

Once a template is created, you can do the following:

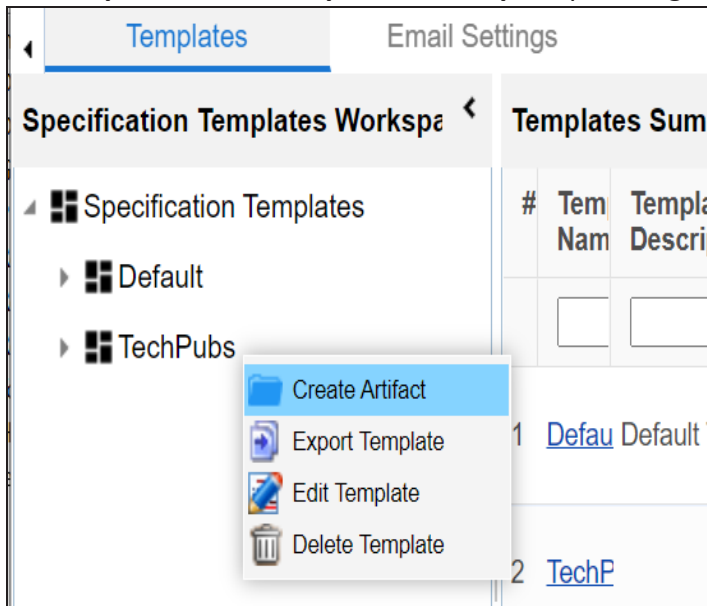
- [Add artifacts to the template](#)
- [Design custom forms for artifacts](#)
- [Manage artifacts](#)
- [Manage templates](#)

Adding Artifacts to Templates

You can enrich a templates with artifacts and supporting documents.

To add artifacts to templates, follow these steps:

1. In the **Specification Templates Workspace** pane, right-click the required template.



Adding Artifacts to Templates

2. Click **Create Artifact**.

The Create Artifact page appears.

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

Field Name	Description
Artifact Name	Specifies the name of the artifact. For example, Enrollments.
Artifact Description	Specifies the description about the artifact. For example: The artifact can document all decisions for Person and Enrollment module.
Tree Node Policy	Specifies the artifact's visibility in the artifact tree in the Requirements Manager. Select an appropriate Tree Node Policy for the artifact: <ul style="list-style-type: none">▪ Display Always: Displays the artifact in the artifact tree.

Adding Artifacts to Templates

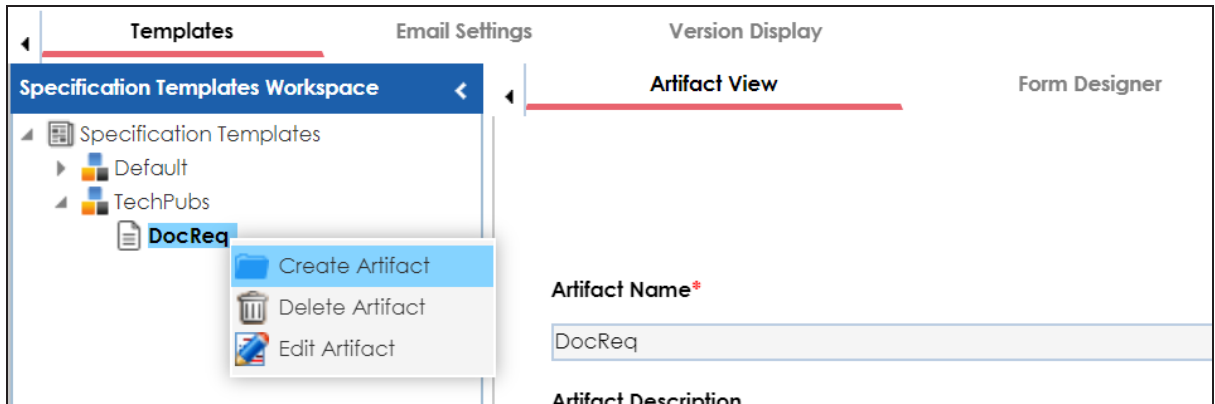
Field Name	Description
	<ul style="list-style-type: none"> ▪ Don't display for single child: Does not display the artifact in the artifact tree. ▪ Display on multiple child nodes: Displays artifacts when it has more than one child artifacts.
Support Documents Upload	Enables the document upload section for the child artifacts. Switch the Supporting Documents Upload option ON to upload documents.
Enable Description	Enables you to add a description to the child artifacts. Switch the Enable Description option ON to enter a description.
Mail Comments	Specifies the mail comments that are sent to project users. For example: This artifact is a part of Health Migration Template. Use this field if the template is being used in any project for creating a specification.

4. Click .

The artifact is created and added to the template.

You can add supporting artifacts to your artifacts. To add sub-artifacts, follow these steps:

1. Right-click an artifact and click **Create Artifact**.



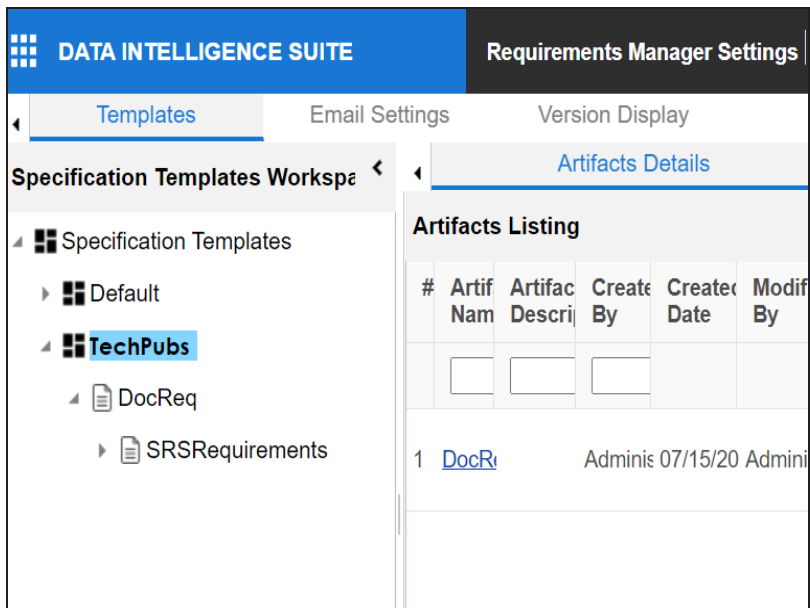
The Create Artifact page appears.

2. Enter the required fields and click .

Adding Artifacts to Templates

Refer to the field description table above.

The sub-artifact is created and is added to the artifact tree.



The screenshot displays the 'DATA INTELLIGENCE SUITE' interface. The top navigation bar includes 'Requirements Manager Settings'. Below it, there are tabs for 'Templates', 'Email Settings', and 'Version Display'. The main content area is divided into two sections: 'Specification Templates Workspa' on the left and 'Artifacts Details' on the right. The 'Artifacts Listing' table is visible, showing a list of artifacts with columns for '#', 'Artif Nam', 'Artifac Descrij', 'Create By', 'Created Date', and 'Modif By'. The table contains one row with the following data:

#	Artif Nam	Artifac Descrij	Create By	Created Date	Modif By
1	DocRe		Adminis	07/15/20	Admini

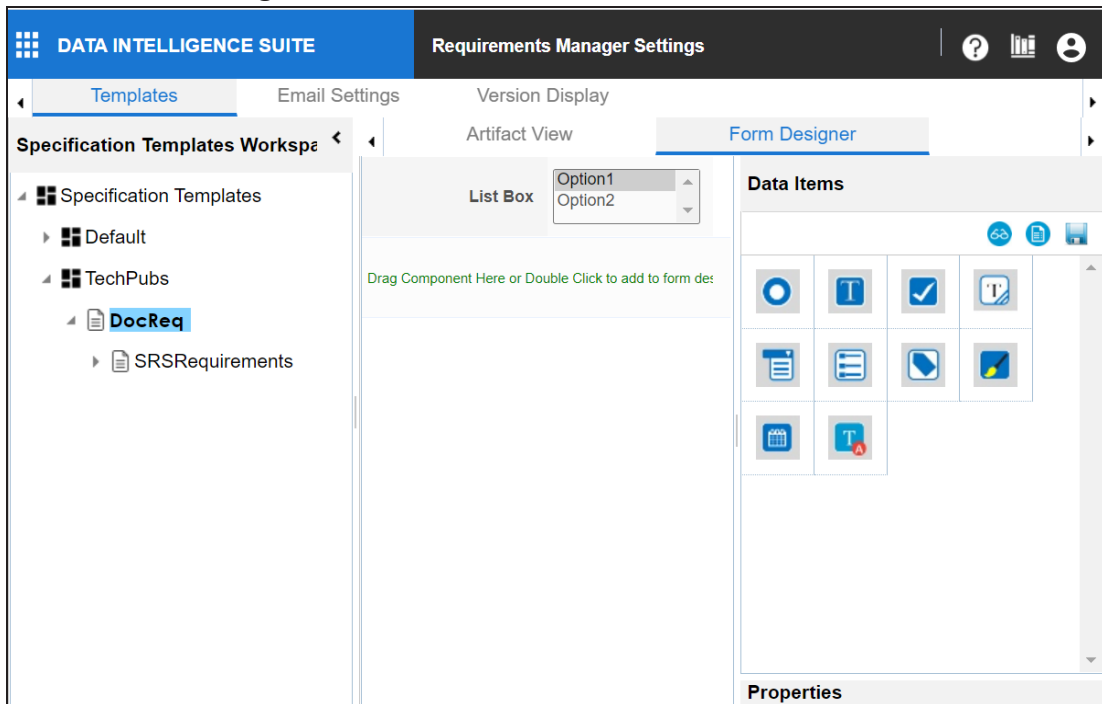
Once you have added an artifact to a template, you can [create custom forms](#) for the artifact.

Designing Forms

You can design a custom form for an artifact. The custom form is applicable to all child artifacts.

To design forms, follow these steps:

1. In the **Specification Templates Workspace** pane, click an artifact.
2. Click the **Form Designer** tab.

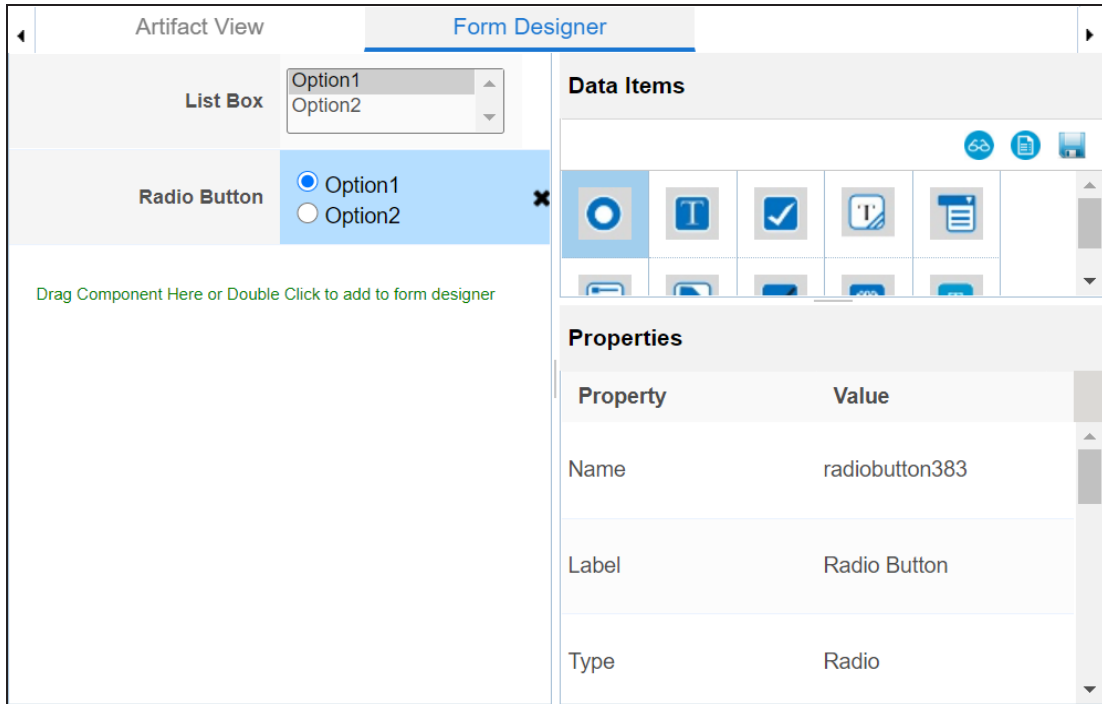


From this page, you can access the following panes:

- **Data Items:** This pane displays the available UI elements
 - **Properties:** This pane displays the properties of the selected UI element in the form designing space
3. Double-click, or drag and drop an UI elements from the Data Items pane to the designing space.

Designing Forms

4. Select a UI element in the designing space to view and configure their properties in the Properties pane.






The properties differ based on the UI element you select.



Refer to the following table for property descriptions:

Property	Description
Name	Specifies the name of the form field. For example, combobox260. You can change it as per your requirements.
Label	Specifies the display name of the field. For example, Status.
Type	Specifies the type of form field. For example, Combo Box. Double-click the corresponding value cell to select an option.
Visible	Specifies whether the field is visible on the form.

Designing Forms

Property	Description
	Select the Visible check box to make the field visible on the form.
Enabled	Specifies whether the field is available on the form. Select the Enabled check box to enable the field on the form.
Mandatory	Specifies whether the field is mandatory on the form. Select the Mandatory check box to make the field mandatory on the form.
Control Width	Specifies the width of the control option. For example, 95%. Double-click the corresponding value cell to change it.
Label Style	Specifies the label's text style of the field. Click  to select a text style.
Control Style	Specifies the text style in the input field. Click  to configure the text style.
Default Value	Specifies the default value of the field. For example, Draft. Double-click the corresponding value cell to change it.
List	Specifies the list of values applicable for this field. For example: <ul style="list-style-type: none"> ▪ Draft ▪ Ready for review ▪ Approved Click  to configure control option and define values.

5. Also, you can:

- Click  to view form properties
- Click  for preview

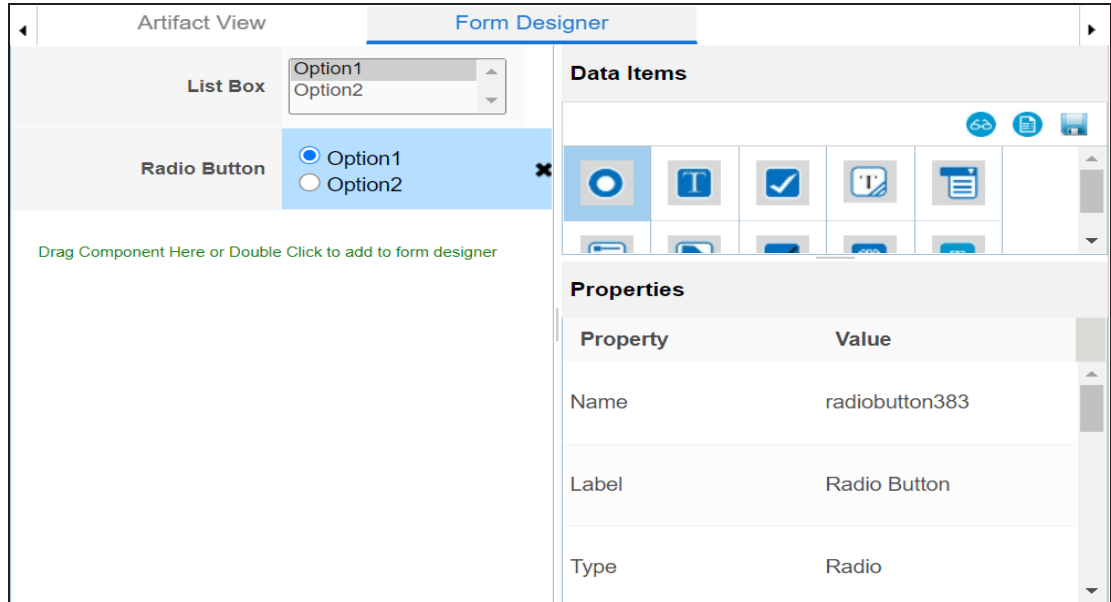
6. Click .

Designing Forms

The Master Template Option is saved.

To understand designing forms, for example, follow the steps to add and configure a radio button:

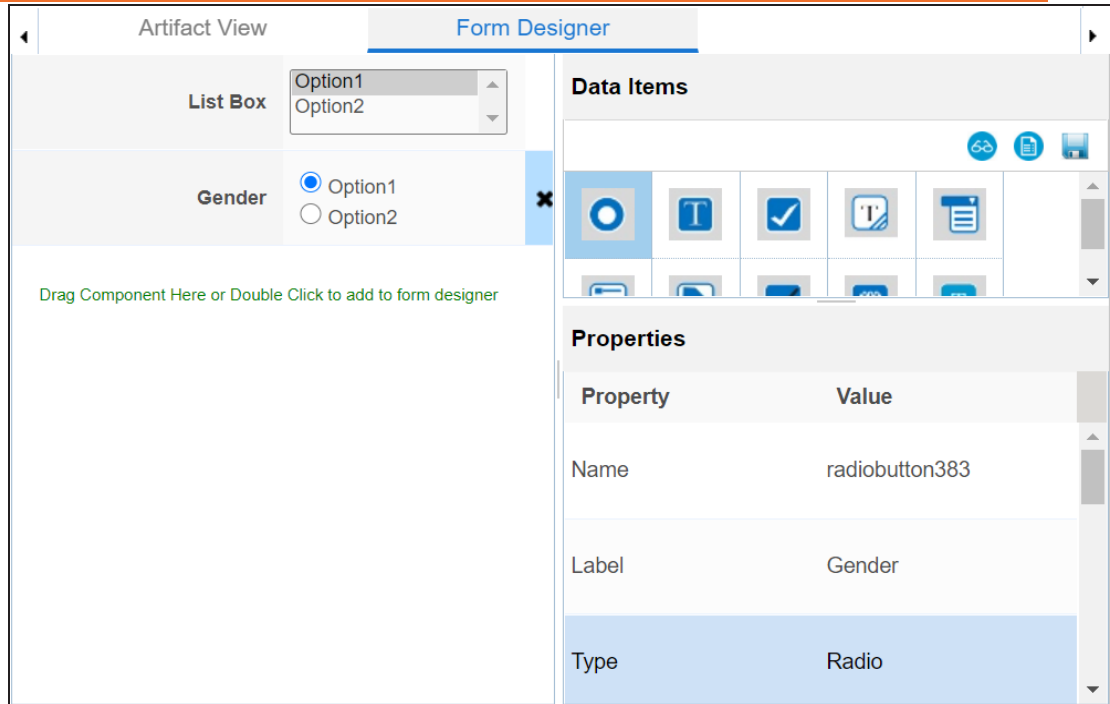
1. Double-click, or drag and drop the Radio Button icon from Data Items to the space provided to design the form.




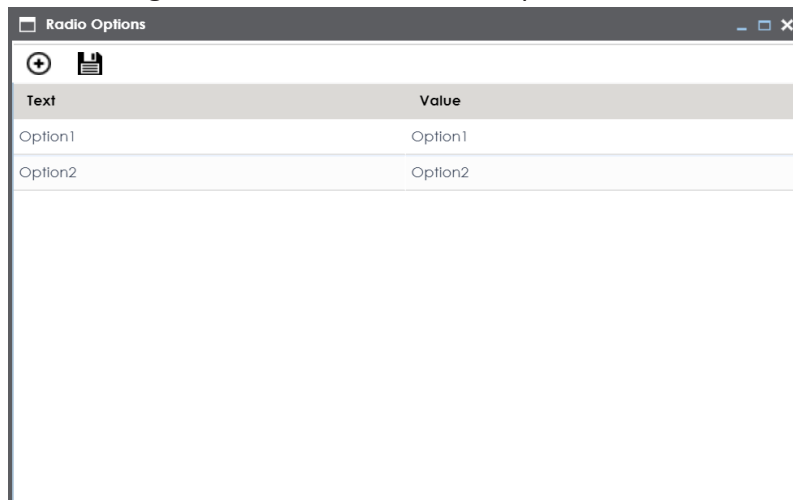
2. Click the cell containing Option 1.
You can view the properties of the data item.
3. Double-click the **Value** cell corresponding to **Label** and edit it to change the Label.

For example, we changed it to Gender and the form appears as shown below.

Designing Forms



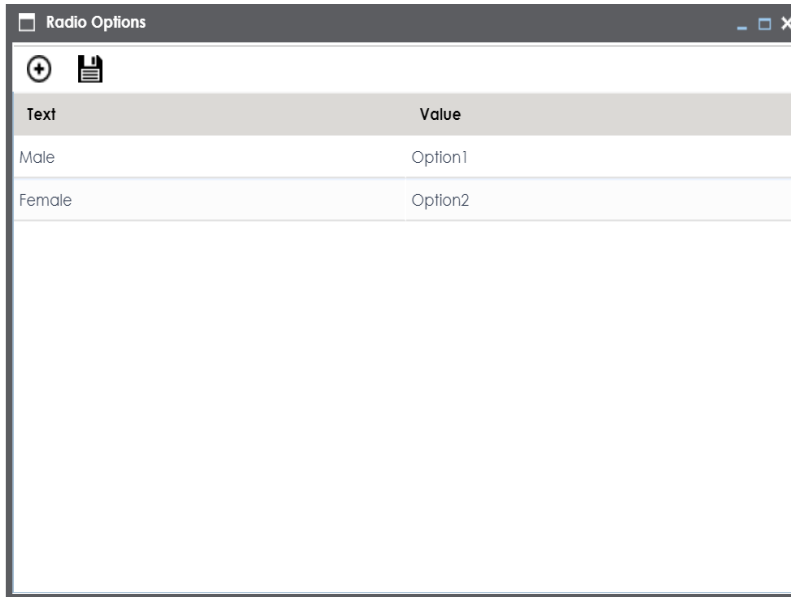
4. Click  against the **List** to edit radio options.



5. Double-click **Option 1** and edit it. Similarly, to edit Option 2 text in the form double-click **Option 2**.


Designing Forms

We edited Option 1 text and Option 2 text and entered Male, and Female respectively.

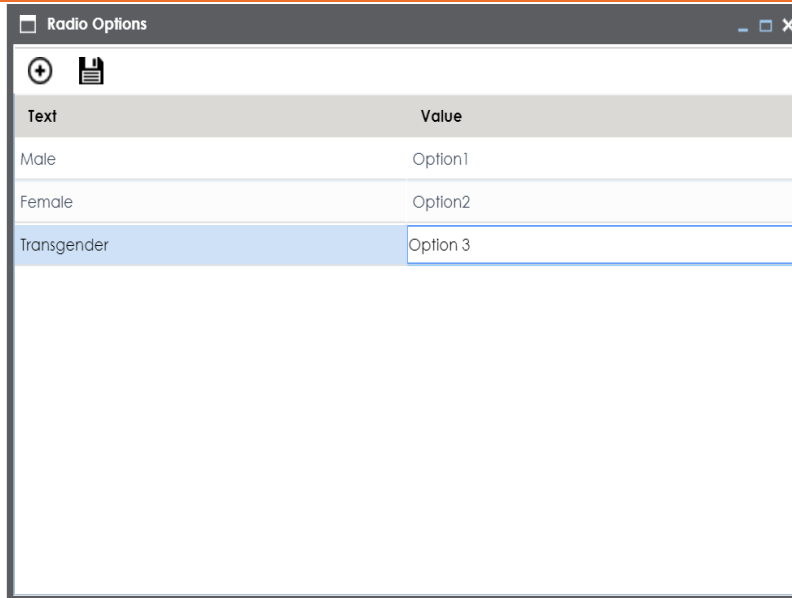


The screenshot shows a window titled "Radio Options" with a table containing two rows of data. The table has two columns: "Text" and "Value".

Text	Value
Male	Option1
Female	Option2

6. Click  to add more options.
One row is added.
7. Double-click the cells to enter the option.

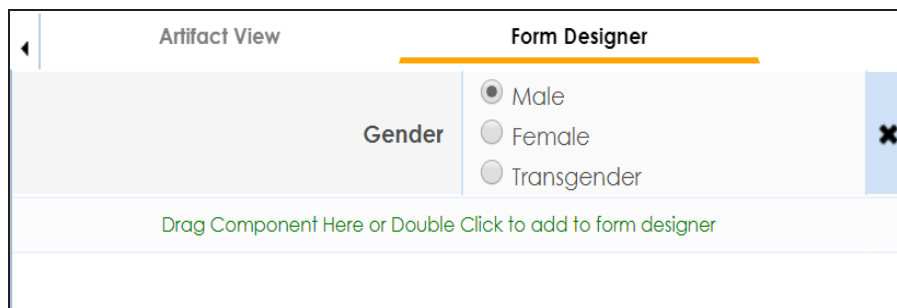
Designing Forms



Text	Value
Male	Option1
Female	Option2
Transgender	Option 3

8. Click .

The options in the form are modified.



Artifact View Form Designer

Gender

Male

Female

Transgender

Drag Component Here or Double Click to add to form designer

7. Click .

The Master Template Option is saved.

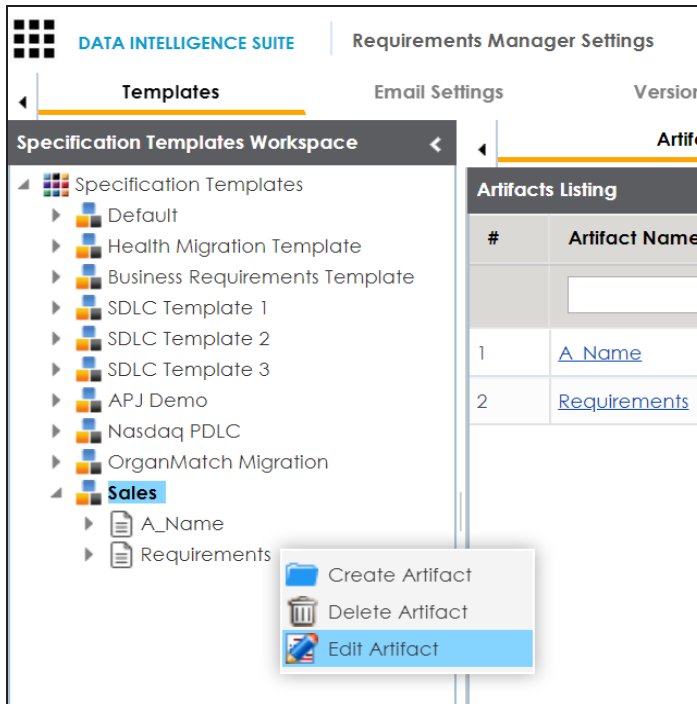
Managing Artifacts

Managing artifacts involves:

- Editing artifacts
- Deleting artifacts

To edit artifacts, follow these steps:

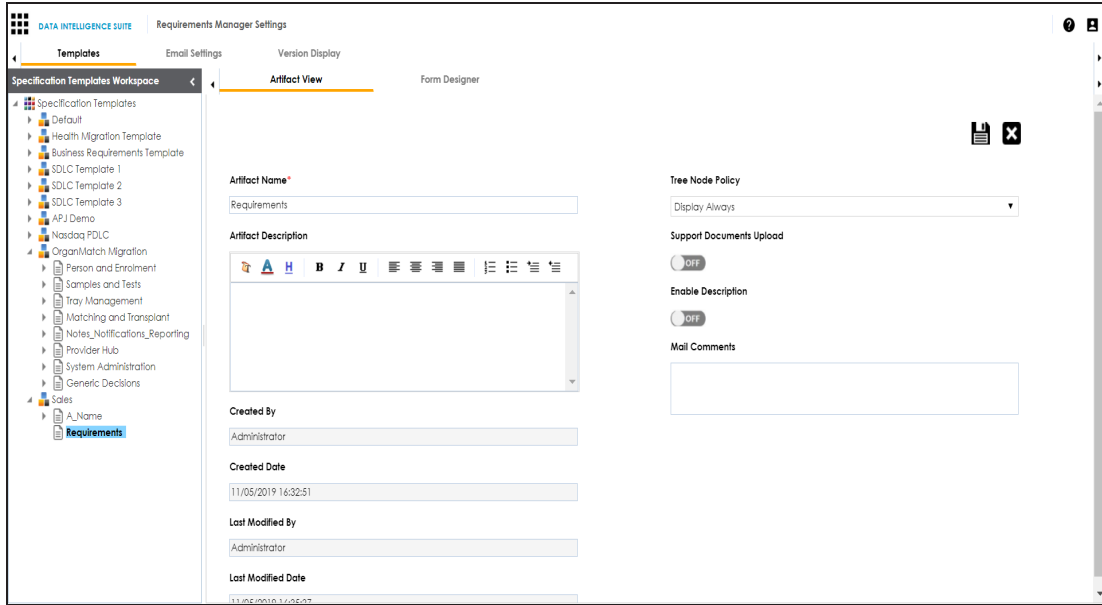
1. In the **Specification Templates Workspace** pane, right-click an artifact.



2. Click **Edit Artifact**.

The Artifact View tab appears in editable mode.

Managing Artifacts



3. Edit the required information.

4. Click .

The updated information is saved.

To delete artifacts, follow these steps:

1. In the **Specification Templates Workspace** pane, right-click an artifact.

2. Click **Delete**.

A warning message appears to confirm deletion.

3. Click **Yes**.



Deleting an artifact removes all associated artifacts and specification artifacts.

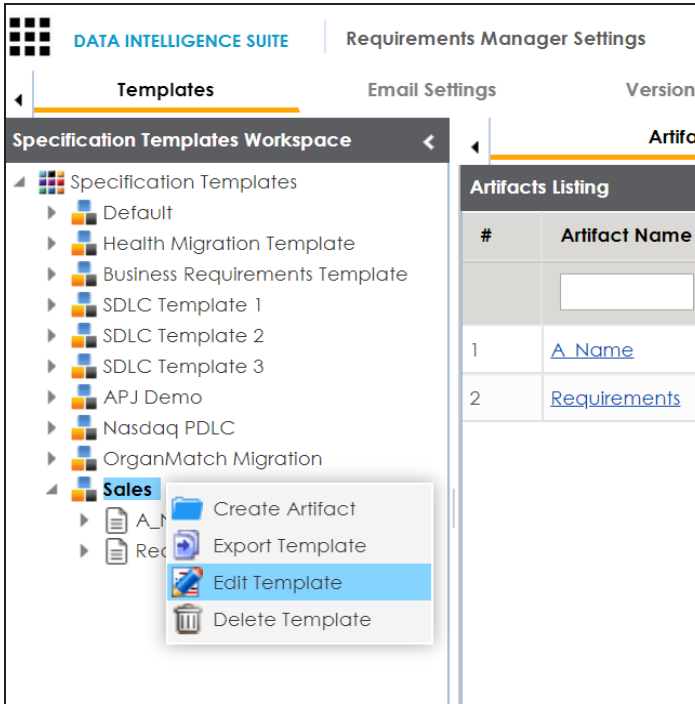
Managing Templates

Managing templates involves:

- Exporting templates
- Editing templates
- Deleting templates

To manage templates, follow these steps:

1. In the **Specification Templates Workspace** pane, right-click a template to view its management options.



2. Use the following options:

Export Template

Use this option to export the template in .xml format.

Edit Template

Managing Templates

Use this option to edit the template. You can update template name and its description.

Delete Template

Use this option to delete the template.

Configuring Email Settings

An administrator can set up templates for email notifications that are sent to project users whenever an action is performed on the following objects:

- Specification
- Artifact
- Specification Artifact



Specification artifact is also called as child artifact.

The actions can be Add, Delete, Edit, Version, or Copy. For each object-action combination, you can configure a custom email template.

For example, you can configure a template for the artifact-add combination. Whenever an artifact is added, an email notification based on the template will be sent to project users from the administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

To configure email templates, follow these steps:

1. Go to **Application Menu > Settings > Requirements Manager**
2. Click the **Email Settings** tab.

The following page appears.

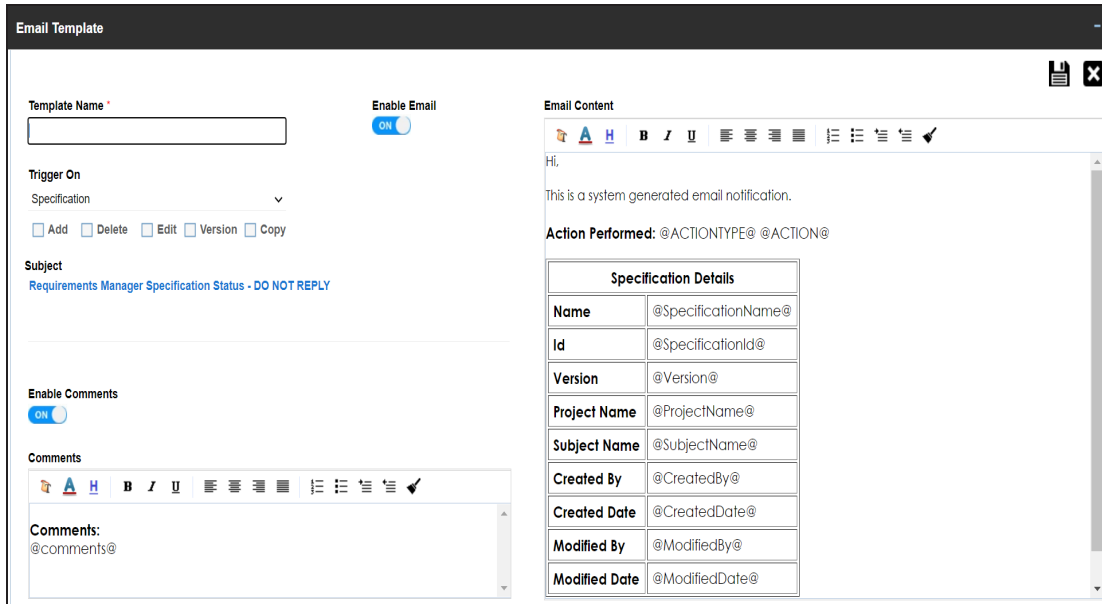
The screenshot shows the 'Requirements Manager Settings' page with the 'Email Settings' tab selected. The page has a blue header with 'DATA INTELLIGENCE SUITE' and a dark grey sub-header with 'Requirements Manager Settings'. Below the header are three tabs: 'Templates', 'Email Settings' (active), and 'Version Display'. A table is displayed below the tabs with the following columns: '#', 'Template Name', 'Trigger On', 'Template Enabled?', 'Comments Enabled?', and 'Options'. The table is currently empty.

#	Template Name	Trigger On	Template Enabled?	Comments Enabled?	Options
---	---------------	------------	-------------------	-------------------	---------

Configuring Email Settings

3. Click .


The Email Template page appears.



The screenshot shows the 'Email Template' configuration interface. It includes a 'Template Name' field with a red asterisk, an 'Enable Email' toggle set to 'ON', a 'Trigger On' dropdown set to 'Specification', and checkboxes for 'Add', 'Delete', 'Edit', 'Version', and 'Copy'. The 'Subject' field contains 'Requirements Manager Specification Status - DO NOT REPLY'. There is also an 'Enable Comments' toggle set to 'ON' and a 'Comments' field with '@comments@'. The 'Email Content' section shows a rich text editor with a sample email body and a 'Specification Details' table.

Specification Details	
Name	@SpecificationName@
Id	@SpecificationId@
Version	@Version@
Project Name	@ProjectName@
Subject Name	@SubjectName@
Created By	@CreatedBy@
Created Date	@CreatedDate@
Modified By	@ModifiedBy@
Modified Date	@ModifiedDate@

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

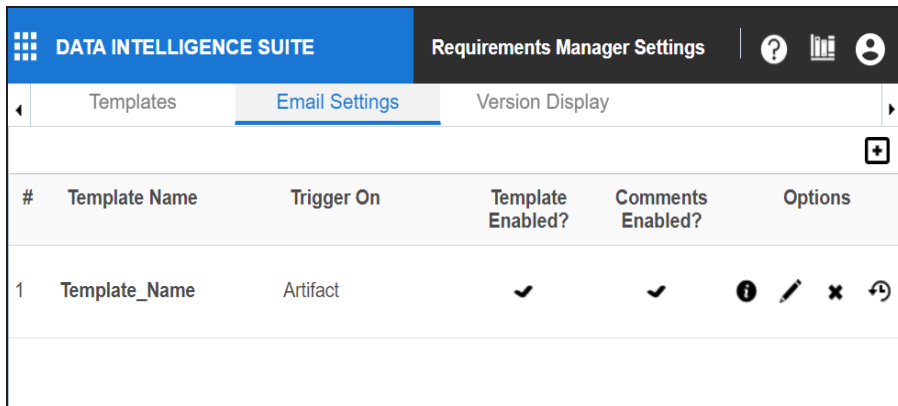
Field Name	Description
Template Name	Specifies the name of the template. For example, Specification Email Template.
Trigger On	Specifies whether the email template is for Specification, Artifact, or Specification Artifact. Based on the selection, select the actions on which an email notification must be sent to project users. Actions can be Add, Delete, Edit, Version, or Copy.  Version and Copy actions are available only for Specification.
Enable Email	Switch Enable Email to ON to enable the template.





Configuring Email Settings

Field Name	Description
Subject	Specifies the subject of the email notification. By default, a subject is provided. However, you can edit it.
Email Content	Specifies the content template of the email notification. By default, template content is provided. However you can edit it.
Enable Comments	Whenever an action is performed on an object, you can add comments to the Mail Comments field. Switch Enable Comments to ON to add these comments to the email notification.
Comments	Specifies the content of the comment section in the email notification. By default, content is provided. However, you can edit it.

5. Click .

The template is created and saved under Email Settings.



#	Template Name	Trigger On	Template Enabled?	Comments Enabled?	Options
1	Template_Name	Artifact	✓	✓	   

Use the following options to manage email templates:

Preview Email Message ()

You can preview the email message after configuring an email template.

Edit ()

You can update the fields in an email template.

Delete ()

Configuring Email Settings

You can delete an email template that is no longer required.

History

You can view the activity logs of an email template and analyze all the actions performed on the email template.

Configuring Version Display

You can display specification version in two ways:

1. **Standard Specification Version:** This option displays the version of the specification in a standard form.

For example, Data_Mart (v.1.00), where Data_Mart is the Specification Name and 1.00 is the Specification Version.

2. **Version Label:** This option displays the version of the specification using a version label.

For example, Data_Mart (erwin_Mart) where Data_Mart is the specification name and erwin_Mart is the Version Label.

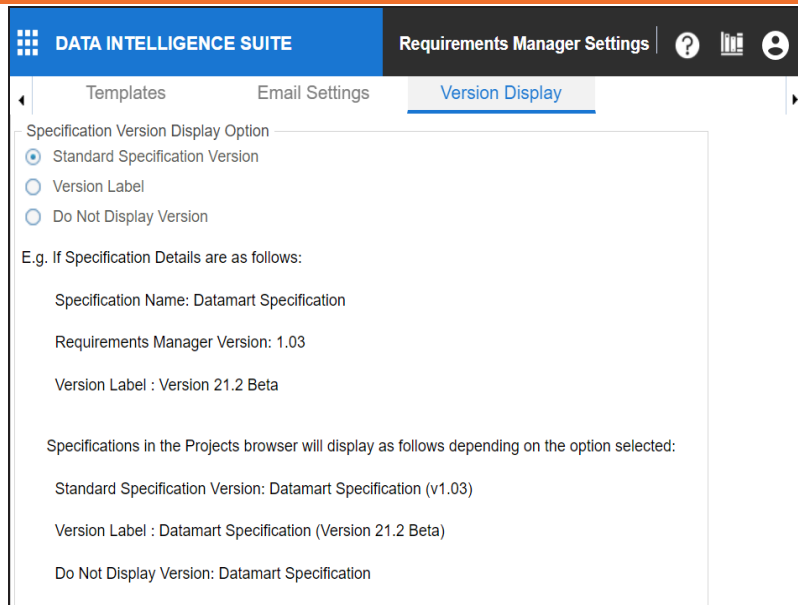
Version Label is specified while [creating specifications](#). You can also provide version label by editing specifications.

To configure version display of specifications, follow these steps:

1. Go to **Application Menu > Settings > Requirements Manager**.
2. Click the **Version Display** tab.

The following page appears.

Configuring Version Display



3. Use the following options:

Standard Specification Version

To display the version of specifications in standard mapping version, click **Standard Mapping Version**.

Version Label

To display the version of specifications using version label, click **Version Label**.

Do Not Display Version

To display maps without version, click **Do Not Display Version**.

Business Glossary Manager

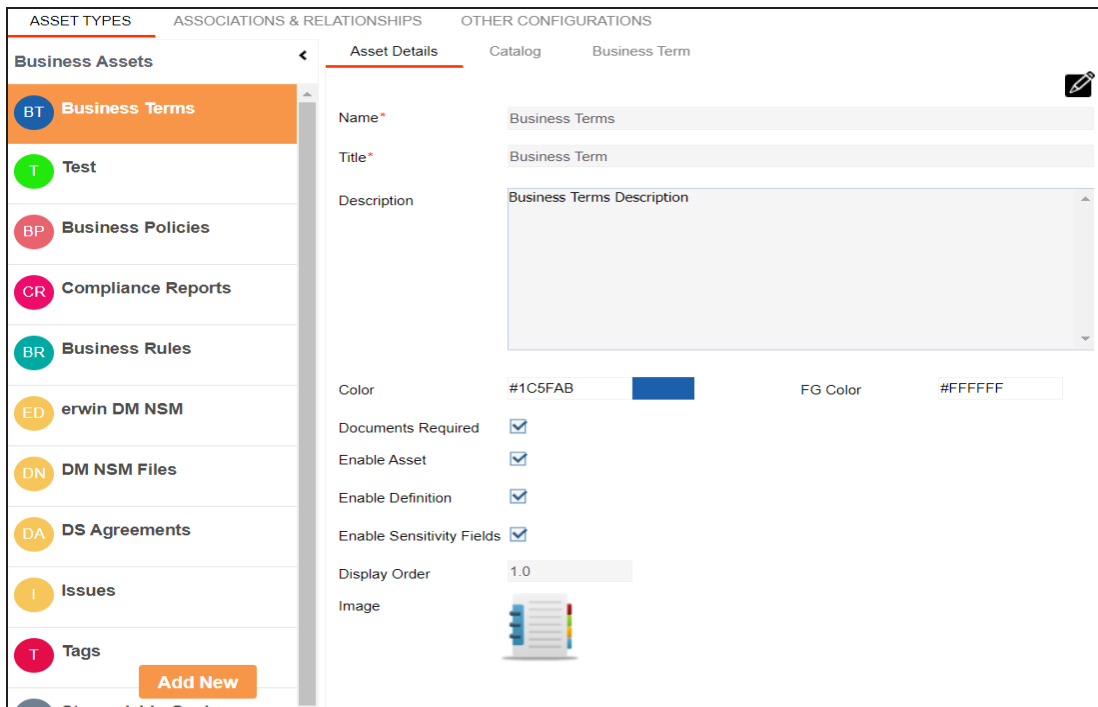
On the Business Glossary Manager Settings page, you can set up the Business Glossary Manager with respect to:

- [Asset types](#)
- [Associations and relationships](#)
- [Miscellaneous configurations](#)

Under each of these, you can configure several settings that determine the properties of each asset type, their availability, and the appearance of the user interface.

Other than configuring the default asset types, you can add new asset types to the Business Glossary Manager. For more information, refer to the [Adding Asset Types](#) topic.

To access Business Glossary Manager Settings, go to **Application Menu > Settings > Business Glossary Manager**. The Business Glossary Manager Settings page appears:

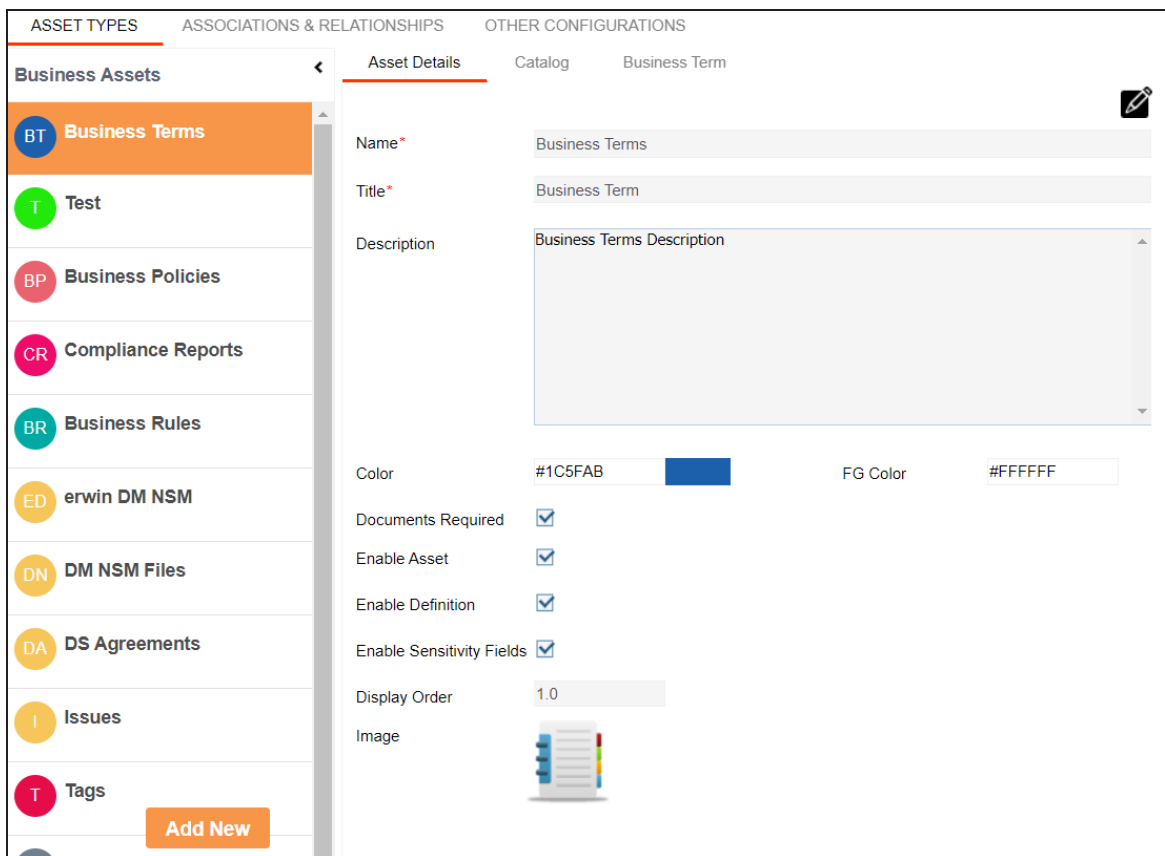


Configuring Asset Types

Asset types are the business assets (business terms, business rules, business policy, and so on) that you work on in the Business Glossary Manager. For each of the asset types, you can configure several settings, such as their availability, properties, and so on.

To configure asset types, follow these steps:

1. Go to **Application Menu > Settings > Business Glossary Manager**.
The Business Glossary Manager Settings page appears. By default, the ASSET TYPES settings open.



2. In the **Business Assets** pane, select an asset type.
The corresponding settings appear in the right pane. These settings are grouped into

Configuring Asset Types

three different tabs, Asset Details, Catalog or Category, and <Asset Name>. However, the tabs differ based on the asset type that you select.


3. Work on each tab to configure asset types:

- **Asset Details:** Use this tab to configure basics of the asset. For example, name, description, and appearance. For more information, refer to the [Configuring Asset Details](#) topic.
- **Catalog or Category:** Use this tab to set up a form for asset type container. For example, a catalog or category. For more information, refer to the [Configuring Catalog Form](#) topic.
- **<Asset Name>:** Use this tab to set up a form for additional information of the asset. For more information, refer to the [Configuring Asset Form](#) topic.

Configuring Asset Details

Configure the basic properties of an asset type, such as its name, availability, and more on the Asset Details tab. By default, all the settings open in the read-only mode.

To configure asset details, follow these steps:

1. On the Asset Details tab, click .

2. Edit the settings appropriately.



For Business Terms, Business Policies, and Business Rules, the following settings are not editable:

- Name
- Title

Configuring Asset Details




- Documents Required
- Enable Asset
- Enable Definition
- Image

Refer to the following table for field descriptions:


Field Name	Description
Name	Specifies the name of the asset type. For example, Business Terms.
Title	Specifies the name of the <Asset Name> tab. For example, Business Term.
Description	Specifies the description about the asset type. For example: A business term defines industry concepts in simple business language.
Color	Select a color to associate it with the asset. In the Business Glossary Manager, the asset type is displayed in the selected color.
Documents Required	Specifies whether documents can be attached to the asset type.
Enable Asset	Specifies whether the asset type is enabled in the Business Glossary Manager.
Enable Definition	Specifies whether the Definition field for the asset type is enabled in the Business Glossary Manager.
Enable Sensitivity Fields	Specifies whether the sensitivity fields for the asset type are enabled in the Business Glossary Manager. There are three sensitivity fields: <ul style="list-style-type: none"> ▪ Sensitive Data Indicator(SDI): Specifies whether the asset is sensitive. ▪ Sensitive Data Indicator (SDI) Classification: Specifies the SDI classification of the asset. For example, PHI. ▪ Sensitive Data Indicator (SDI) Description: Specifies the descrip-

Configuring Asset Details

Field Name	Description
	tion of the SDI classification. For example: Protected Health Information.
Display Order	Specifies the number at which the asset type is available in Business Glossary Manager > Browser pane.
Image	Drag and drop a picture to represent the asset type or click  to browse and upload a picture.

3. Click .

The changes you made are available on the asset type creation page in the Business Glossary Manager. For more information, refer to the [Using Business Glossary Manager](#) topic.

To discard your changes, click .

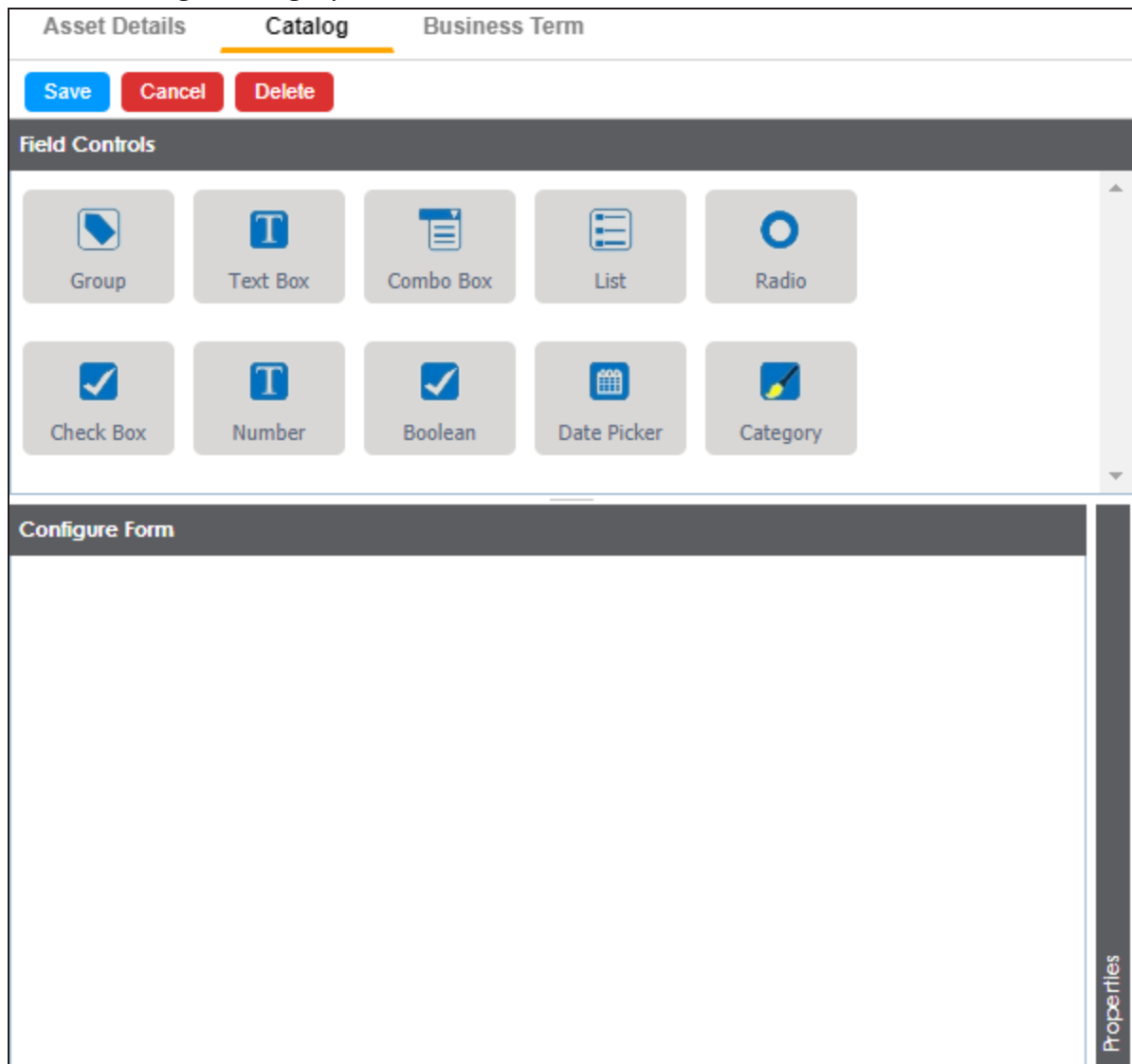
Configuring Catalog Form

Asset types are grouped either under catalogs or categories that act as a container for assets. Design a form and configure the properties of catalog or category on the Catalog or Category tab. By default, all the settings open in the read-only mode.

To design a form and configure catalog or category properties, follow these steps:

Configuring Catalog Form

1. On the Catalog or Category tab, click **Edit**.



The Catalog or Category tab contains the following sections:

- **Field Controls:** This pane displays the available UI elements.
- **Configure Form:** This pane is the canvas where you design the form using the UI elements available in the Field Controls pane.

Configuring Catalog Form

- **Properties:** This pane displays the properties of the UI element selected in the Configure Form pane.
2. Drag and drop the required UI elements from the Field Controls pane to the Configure Form pane.
 3. Select UI elements, one at a time, and configure their properties in the Properties pane.

Property	Value
Published	<input checked="" type="checkbox"/>
Field	Catalog Type
Type	Combo Box
Configure Values	<input type="button" value="Configure"/>
Mandatory	<input type="checkbox"/>
Description	
Visible in Form	<input checked="" type="checkbox"/>
Visible in Grid	<input checked="" type="checkbox"/>
Order	2

Note: 1. Double click on the field cell to update the field name
2. Select the field name to update its properties



The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Configuring Catalog Form

Property	Description
Published	Switch Published to ON to publish the field.
Field	Set the element label.
Type	Select the element type. By default, it is set to the element that you added. However, you can change the type using this property.
Dependencies	Some elements depend on the values of other elements on the form. Select the elements on which your element depends. This property is available for List, Radio, Boolean, and Date Picker elements.
Configure Values	Click to configure the possible values available in an element. You can add custom values or select the data available in your environment. For example, the list available in a Combo Box.
Mandatory	Select whether documents can be attached to the asset type.
Regular Expression	Define a regular expression that must be fulfilled for the text entered in the text box. For example, a password text box should be validated for the correct password format. In that case, the regular expression would define the password criteria.
Description	Enter the description of the element.
Visible in Form	Switch Visible in Form to ON to make the field visible on the form.
Visible in Grid	Switch Visible in Grid to ON to make the field visible in the grid.
Order	Specifies the order of the field on the Extended Properties tab. To enter the order number, double-click the corresponding Value cell. You can also drag and move fields in the Configure Form pane to change their order. For example, if there are four elements on the page and the selected element must appear as the third element, set the order to 3.

- Once, you have designed the form and configured the properties of all the UI elements, click **Save**.

The changes you made are available on the catalog or category creation page in the

Configuring Catalog Form

Business Glossary Manager. For more information on creating catalogs, refer to the [Creating Catalogs](#) topic.

The following image shows a sample catalog creation form with text box, combo box, and list.

The screenshot shows a 'Configure Form' window with three main sections:

- Catalog Name:** A text input field.
- Catalog Type:** A dropdown menu with the text 'Select an option' and a downward arrow.
- Role:** A list box containing the items 'Data Steward' and 'ETL Developer'.

To understand property configuration, for example, follow these steps to configure the Catalog Type combo box:

1. Select the Catalog Type element.

Its properties appear in the Properties pane.

The screenshot shows the 'Configure Form' window with the 'Catalog Type' field selected. The 'Properties' pane on the right displays the following configuration:

Property	Value
Published	<input checked="" type="checkbox"/>
Field	Catalog Type
Type	Combo Box
Configure Values	<input type="button" value="Configure"/>
Mandatory	<input type="checkbox"/>
Description	
Visible in Form	<input checked="" type="checkbox"/>
Visible in Grid	<input checked="" type="checkbox"/>
Order	2

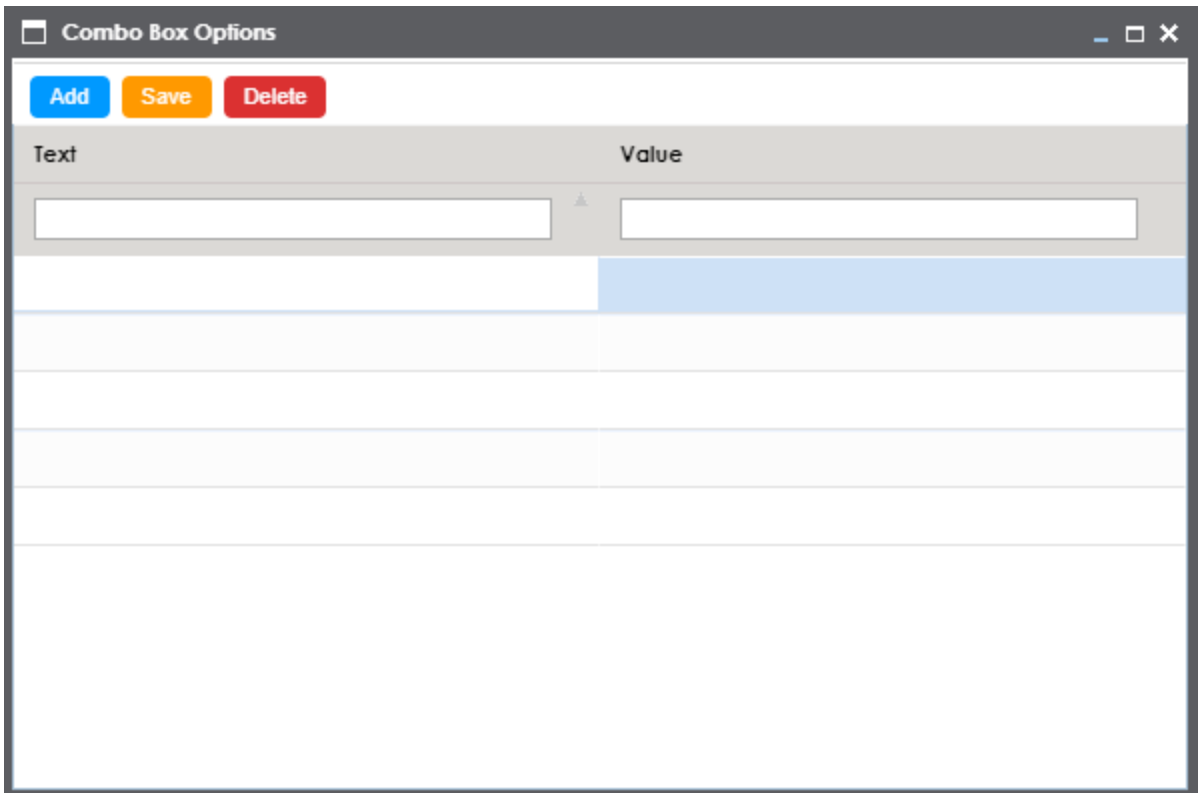
Note: 1. Double click on the field cell to update the field name
2. Select the field name to update its properties

2. Click **Configure**.

The Combo Box Options page appears. Use this page to add items to the Catalog Type

Configuring Catalog Form

combo box list.



The screenshot shows a window titled "Combo Box Options" with a standard Windows-style title bar. At the top, there are three buttons: "Add" (blue), "Save" (orange), and "Delete" (red). Below the buttons is a table with two columns: "Text" and "Value". The table has a header row and several data rows. The first data row is highlighted in light blue. The "Text" column contains a text input field, and the "Value" column contains a text input field with a small upward-pointing triangle icon to its left. The table is currently empty of data.

3. Click **Add**.
Rows are added to the grid on the page.
4. Double-click cells in the grid to edit them.
5. Enter values under the Text and Value columns in each row.
6. Click **Save**.
The list you added appears in the Catalog Type combo box. The following image shows both, the Combo Box Options page and the Catalog Type combo box with the

Configuring Catalog Form

list.

Combo Box Options

Add **Save** **Delete**

Text	Value
<input type="text"/>	<input type="text"/>
Business	Business
Data	Data
Policies	Policies

Configure Form

Catalog Name

Catalog Type

- Select an option
- Business
- Data
- Policies

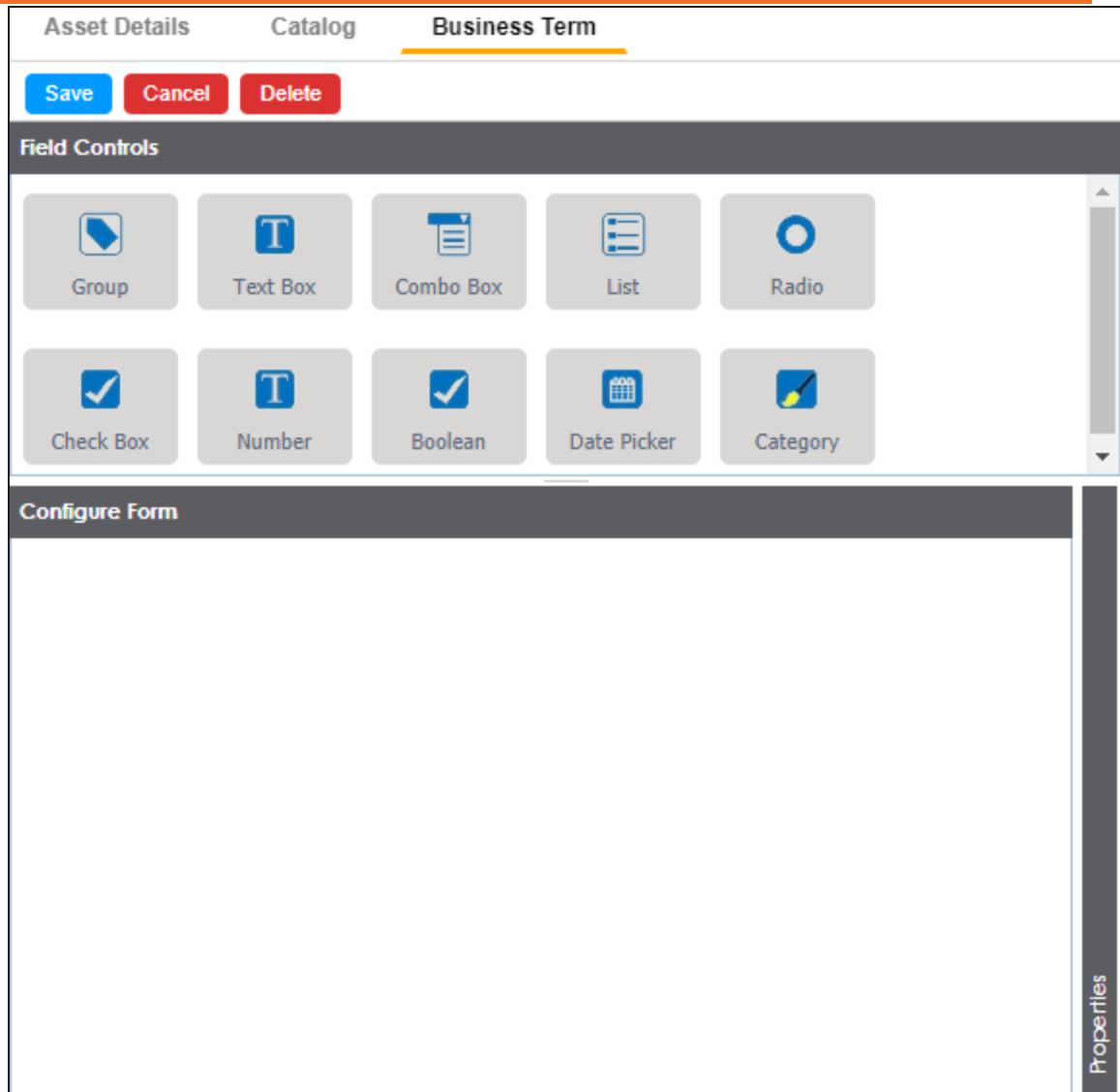
Configuring Asset Form

Assets are the business assets (business terms, business rules, business policy, and so on) that you work on in the Business Glossary Manager. For each asset type, apart from its default properties, you can configure custom properties. To do so, design a form and configure the custom properties on the <Asset Type> tab. By default, all the settings open in the read-only mode.

To design a form and configure custom asset properties, follow these steps:

1. On the <Asset Name> tab, click **Edit**.
For example, click **Edit** on the Business Term tab.

Configuring Asset Form



The <Asset Name>, tab contains the following sections:

- **Field Controls:** This pane displays the available UI elements.
- **Configure Form:** This pane is the canvas where you design the form using the UI elements available in the Field Controls pane.
- **Properties:** This pane displays the properties of the UI element selected in the Configure Form pane.

Configuring Asset Form

2. Drag and drop the required UI elements from the Field Controls pane to the Configure Form pane.
3. Select UI elements, one at a time, and configure their properties in the Properties pane.

The screenshot displays the 'Business Term' configuration interface. At the top, there are tabs for 'Asset Details', 'Catalog', and 'Business Term'. Below the tabs are 'Save', 'Cancel', and 'Delete' buttons. The 'Field Controls' pane contains various UI element icons: Group, Text Box, Combo Box, List, Radio, Check Box, Number, Boolean, Date Picker, and Category. The 'Configure Form' pane shows a form with fields for 'GDPR Class', 'Is Element Sensitive', 'Location', and 'Data Owner'. The 'Properties' pane contains a table with columns 'Property' and 'Value', listing properties like Dependencies, Configure Values, Mandatory, Description, Visible in Form, Visible in Grid, and Order. A note at the bottom states: 'Note: 1. Double click on the field cell to update the field name. 2. Select the field name to update its properties.'



The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description
Published	Switch Published to ON to publish the field.

Configuring Asset Form

Property	Description
Field	Set the element label.
Type	Select the element type. By default, it is set to the element that you added. However, you can change the type using this property.
Dependencies	Some elements depend on the values of other elements on the form. Select the elements on which your element depends. This property is available for List, Radio, Boolean, and Date Picker elements.
Configure Values	Click to configure the possible values available in an element. You can add custom values or select the data available in your environment. For example, the list available in a Combo Box.
Mandatory	Select whether documents can be attached to the asset type.
Regular Expression	Define a regular expression that must be fulfilled for the text entered in the text box. For example, a password text box should be validated for the correct password format. In that case, the regular expression would define the password criteria.
Description	Enter the description of the element.
Visible in Form	Switch Visible in Form to ON to make the field visible on the form.
Visible in Grid	Switch Visible in Grid to ON to make the field visible in the grid.
Order	Specifies the order of the field on the Extended Properties tab. To enter the order number, double-click the corresponding Value cell. You can also drag and move fields in the Configure Form pane to change their order. For example, if there are four elements on the page and the selected element must appear as the third element, set the order to 3.

4. Once, you have designed the form and configured the properties of all the UI elements, click **Save**.

The changes you made are available on the asset creation page in the Business Glossary Manager. For more information on creating business assets, refer to the [Using Business Glossary Manager](#) topic.

Configuring Asset Form

The following image shows a sample catalog creation form with text box, combo box, and list.

The image shows a 'Configure Form' dialog box with the following fields:

- GDPR Class**: A dropdown menu with the text 'Select an option' and a downward arrow.
- Is Element Sensitive**: A checkbox that is currently unchecked.
- Location**: A dropdown menu with the text 'Select an option' and a downward arrow.
- Data Owner**: A dropdown menu with the text 'Select an option' and a downward arrow.

To understand property configuration, for example, follow these steps to configure the GDPR Class combo box:

1. Select the GDPR Class element.
Its properties appear in the Properties pane.

The image shows the 'Configure Form' dialog box with the 'GDPR Class' field selected. The 'Properties' pane on the right is open, displaying the following table:

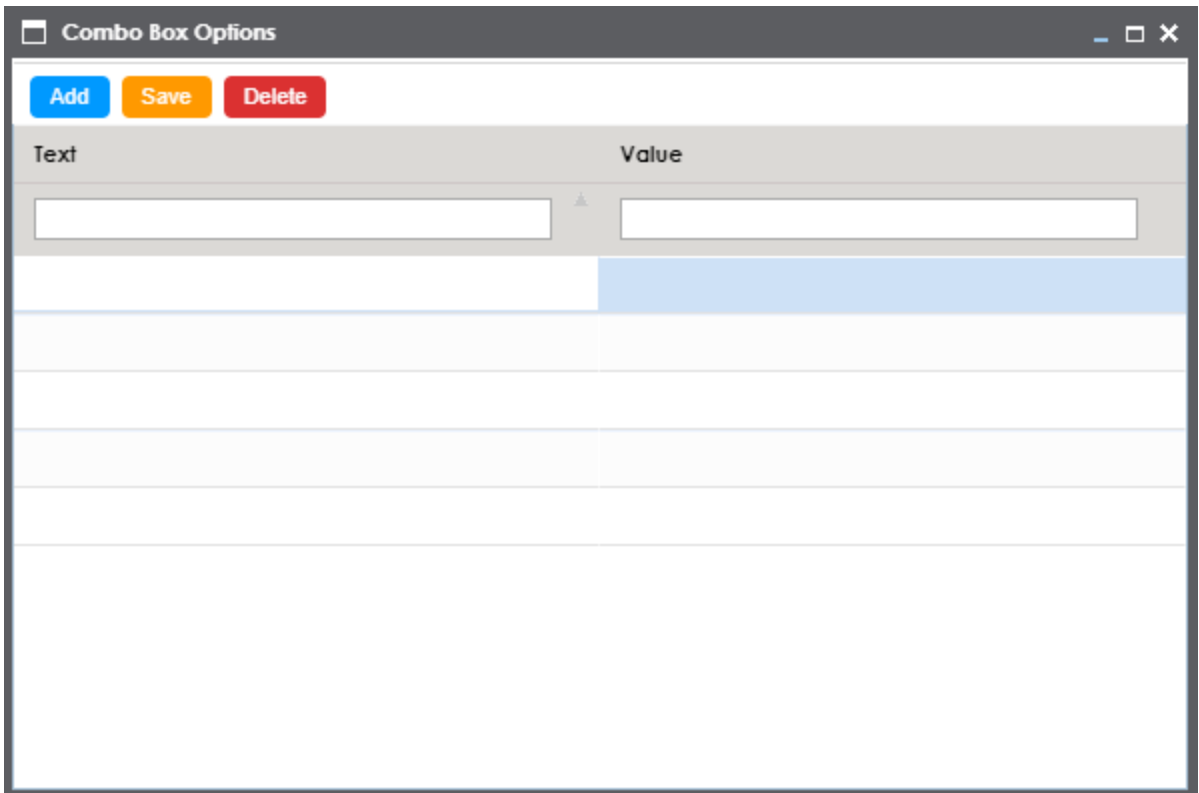
Property	Value
Published	<input checked="" type="checkbox"/>
Field	GDPR Class
Type	Combo Box
Dependencies	Type or click he <input type="text"/>
Configure Values	<input type="button" value="Configure"/>
Mandatory	<input type="checkbox"/>
Description	
Visible in Form	<input type="checkbox"/>
Visible in Grid	<input type="checkbox"/>
Order	1

Note: 1. Double click on the field cell to update the field name
2. Select the field name to update its properties

2. Click **Configure**.
The Combo Box Options page appears. Use this page to add items to the Catalog Type

Configuring Asset Form

combo box list.



The screenshot shows a window titled "Combo Box Options" with a standard Windows-style title bar. At the top, there are three buttons: "Add" (blue), "Save" (orange), and "Delete" (red). Below the buttons is a table with two columns: "Text" and "Value". The table has a header row and several empty rows below it. The first row below the header is highlighted in light blue. The "Text" column contains a text input field, and the "Value" column contains a text input field with a small upward-pointing arrow on its left side.

3. Click **Add**.
Rows are added to the grid on the page.
4. Double-click cells in the grid to edit them.
5. Enter values under the Text and Value columns in each row.
6. Click **Save**.
The list you added appears in the Catalog Type combo box. The following image shows both, the Combo Box Options page and the Catalog Type combo box with the

Configuring Asset Form

list.

Text	Value
PII	PII
PHI	PHI
PCI	PCI
Sensitive	Sensitive
Confidential	Confidential

Configure Form	
GDPR Class	Select an option
Is Element Sensitive	Select an option
Location	PII PHI PCI Sensitive Confidential
Data Owner	Select an option

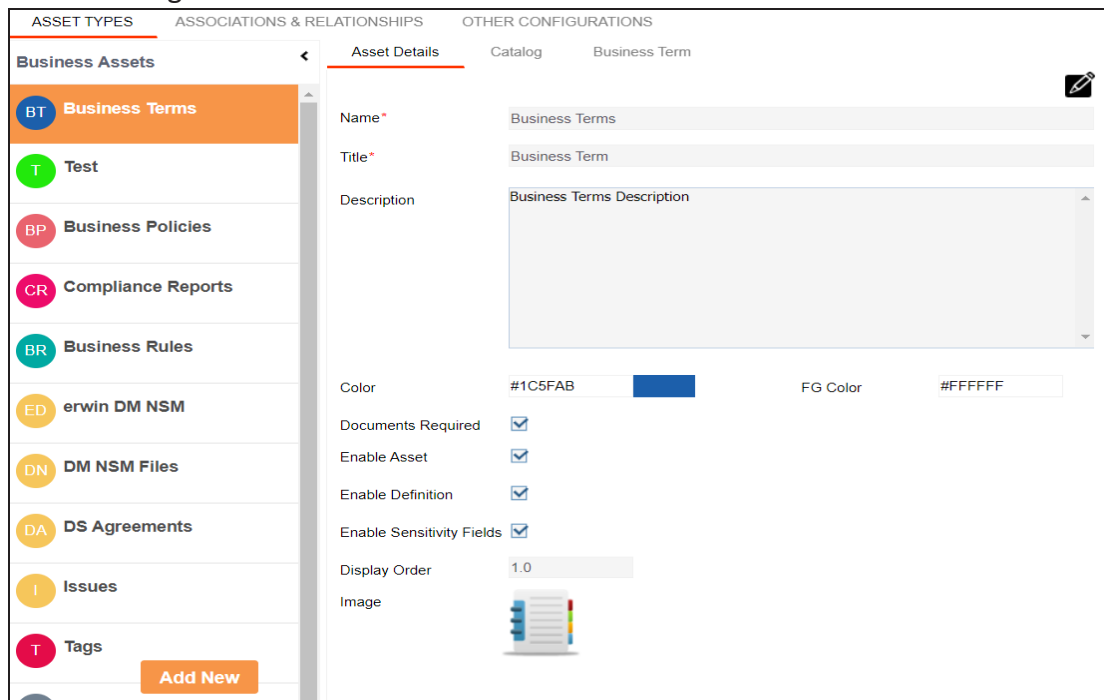
Adding Asset Types

Based on your organizations requirements, you can create custom asset types to supplement the default asset types (Business Term, Business Policy, and Business Rule) available in the Business Glossary Manager.

To add custom asset types, follow these steps:

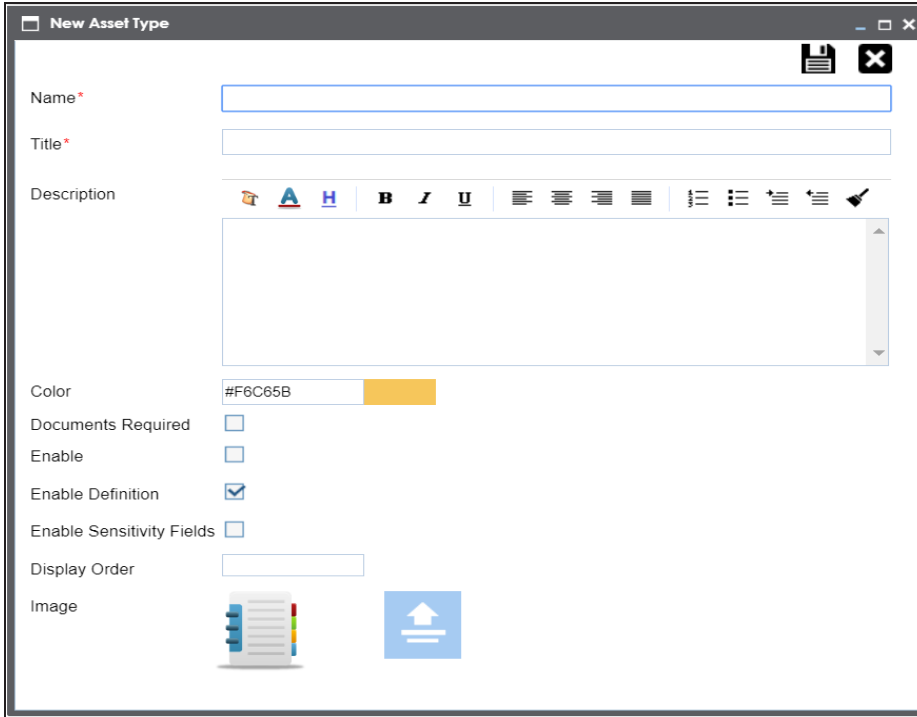
1. Go to **Application Menu > Settings > Business Glossary Manager**.

The Business Glossary Manager Settings page appears. By default, it opens the ASSET TYPES settings.



Adding Asset Types


2. In the Business Assets pane, click **Add New**.
The New Asset Type page appears.



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

Field Name	Description
Name	Enter a name for the asset type. This is used as the display name in the Business Assets pane on the Business Glossary Manager Settings and Business Glossary Manager pages.
Title	Enter a name for the <Asset Name> tab of the asset type's settings.
Description	Enter a description of the asset type.
Color	Select a color to associate it with the asset. In the Business Glossary Manager, the asset type is displayed in the selected color.
Documents Required	Select whether documents can be attached to the asset type.

Adding Asset Types

Field Name	Description
Enable	Select whether the asset type is enabled in the Business Glossary Manager.
Enable Definition	Select whether to enable the Definition field for the asset type in the Business Glossary Manager.
Enable Sensitivity Fields	<p>Specifies whether the sensitivity fields for the asset type are enabled in the Business Glossary Manager.</p> <p>There are three sensitivity fields:</p> <ul style="list-style-type: none">▪ Sensitive Data Indicator (SDI): Specifies whether the asset is sensitive.▪ Sensitive Data Indicator (SDI) Classification: Specifies the SDI classification of the asset. For example, PHI.▪ Sensitive Data Indicator (SDI) Description: Specifies the description of the SDI classification. For example: Protected Health Information.
Display Order	Enter the number at which the asset type is available in Business Glossary Manager > Browser pane.
Image	Drag and drop a picture to represent the asset type or click  to browse and upload a picture.

4. Click .

The asset type is added to the Business Assets pane. Also, it is available in the Business Glossary Manager if you selected the **Enable** check box. For more information, refer to the [Using Business Glossary Manager](#) topic.

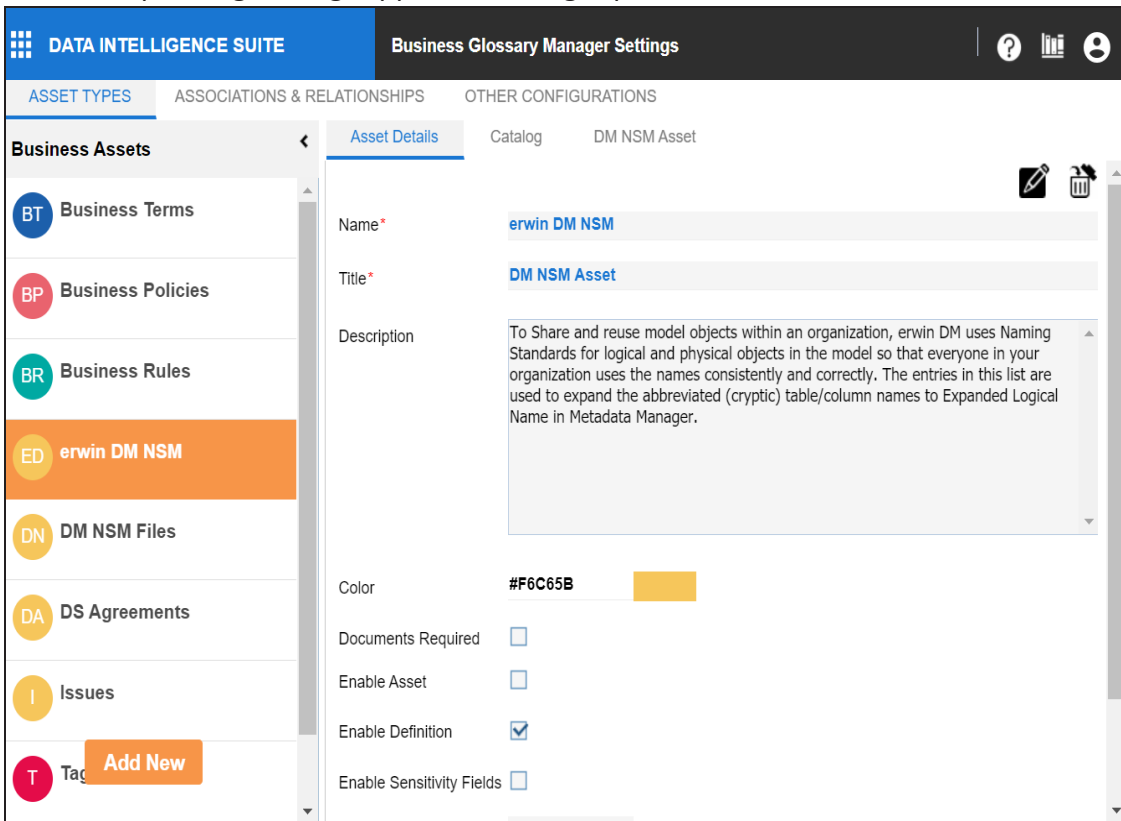
Configuring erwin DM NSM Asset

Using [DM Connect for DI](#), you can export naming standard mappings (NSM) from erwin Data Modeler (DM) to erwin Data Intelligence (erwin DI). These naming standards correspond to business glossary. They are exported to catalogs under **erwin DI > Business Glossary Manager > erwin DM NSM**. For the export job to run smoothly, you need to enable the erwin DM NSM asset type.

To enable erwin DM NSM asset type, follow these steps:

1. Go to **Application Menu > Settings > Business Glossary Manager**.
The Business Glossary Manager Settings page appears. By default, the ASSET TYPES settings open.
2. In the **BUSINESS ASSETS** pane, select **erwin DM NSM**.

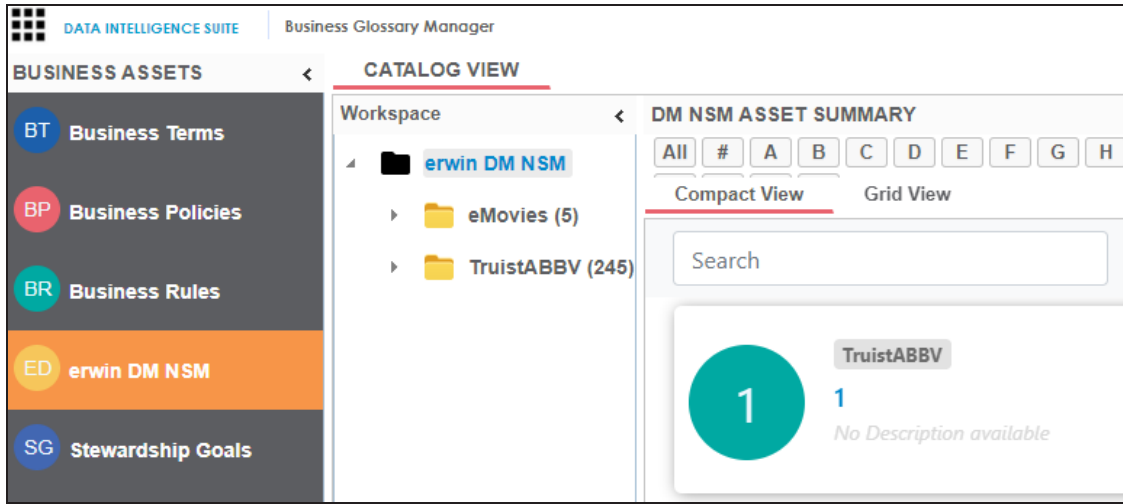
The corresponding settings appear in the right pane.



Configuring erwin DM NSM Asset

3. On the **Asset Details** tab, select **Enable Asset**.

The erwin DM NSM asset is enabled in the Business Glossary Manager.



Configuring Associations and Relationships

You can associate asset types with other asset types, columns, environments, and tables to define your business glossary better. For each asset type, you can configure the objects available for association and their forward and reverse relationships.

To add associations, follow these steps:

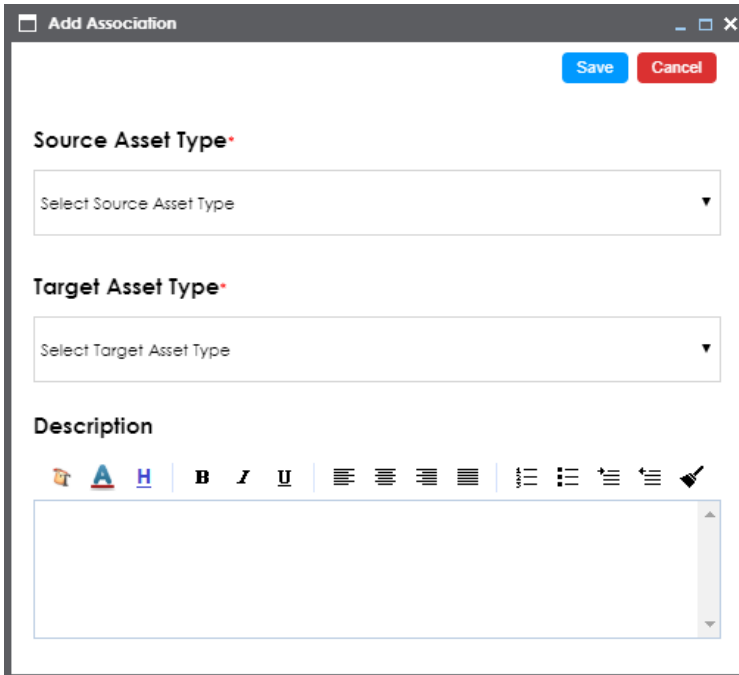
1. Go to **Application Menu > Settings > Business Glossary Manager**.
The Business Glossary Manager Settings page appears. By default, it opens the Asset Types settings.
2. Go to the **Associations & Relationships** tab.

#	Source Asset Type	Target Asset Type	Forward Relationship	Reverse Relationship	Description	Options
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
1	Business Terms	Business Terms				
2	Business Terms	Business Policies				
3	Business Terms	Column				
4	Business Terms	Table				
5	Business Terms	Environment				
6	Business Policies	Column				
7	Business Policies	Business Rules				
8	Business Terms	System				
9	Tags	Business Terms				

Configuring Associations and Relationships

3. Click **+**.

The Add Association page appears.



The screenshot shows a window titled "Add Association". At the top right, there are "Save" and "Cancel" buttons. Below the title bar, there are three sections:

- Source Asset Type***: A dropdown menu with the text "Select Source Asset Type".
- Target Asset Type***: A dropdown menu with the text "Select Target Asset Type".
- Description**: A rich text editor toolbar with icons for bold, italic, underline, list, and other text formatting options, followed by a large text input area.

4. Select or enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

Refer to the following table for field descriptions.

Field Name	Description
Source Asset Type	Select an asset type for which you want to create an association.
Target Asset Type	Select an asset type that you want to associate to the source asset type.
Description	Enter a description of the association.

Configuring Associations and Relationships

5. Click **Save**.

The association is added to the list of relationships.

Summary of Relationships						
#	Source Asset Type	Target Asset Type	Forward Relationship	Reverse Relationship	Description	Options
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
1	Business Terms	Business Terms				
2	Business Terms	Business Policies				
3	Business Terms	Column				
4	Business Terms	Table				
5	Business Terms	Environment				
6	Business Policie	Column				
7	Business Policie	Business Rules				
8	Business Rules	Business Terms				

Adding Relationships

Once an association is added, you can define the forward and reverse relationships between the source and target asset types. For example, for an association between Business Term and Business Policy, relationships can be as follows:

- **Forward Relationship:** Business Term **is associated with** Business Policy.
- **Reverse Relationship:** Business Policy **derives from** Business Term.

To add relationships to an association, follow these steps:

1. In the list of relationships, under the Options column, click **+**.
The Add Relationship page appears.

Configuring Associations and Relationships

The screenshot shows a window titled "Add Relationship" with a "Save" button and a "Cancel" button. The form includes:

- Forward Relationship***: A text input field.
- Reverse Relationship***: A text input field.
- Description**: A rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and undo.
- Display Type**: A dropdown menu currently showing "Single".
- Display Color**: A color picker showing the hex code "#5C5D61" and a color bar with a slider.

2. Select or enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

Refer to the following table for field descriptions.







Field Name	Description
Forward Relationship	Enter a name of the relationship of source asset type with target asset type. For example, <i>is associated with</i> .
Reverse Relationship	Enter a name of the relationship of target asset type with the source asset type. For example, <i>derives from</i> .
Description	Enter a description of the association.
Display Type	Select a relationship notation.

Configuring Associations and Relationships

Field Name	Description
Display Color	Select a color to display the relationship.

3. Click **Save**.

Forward and reverse relationships are added to the list of relationships.

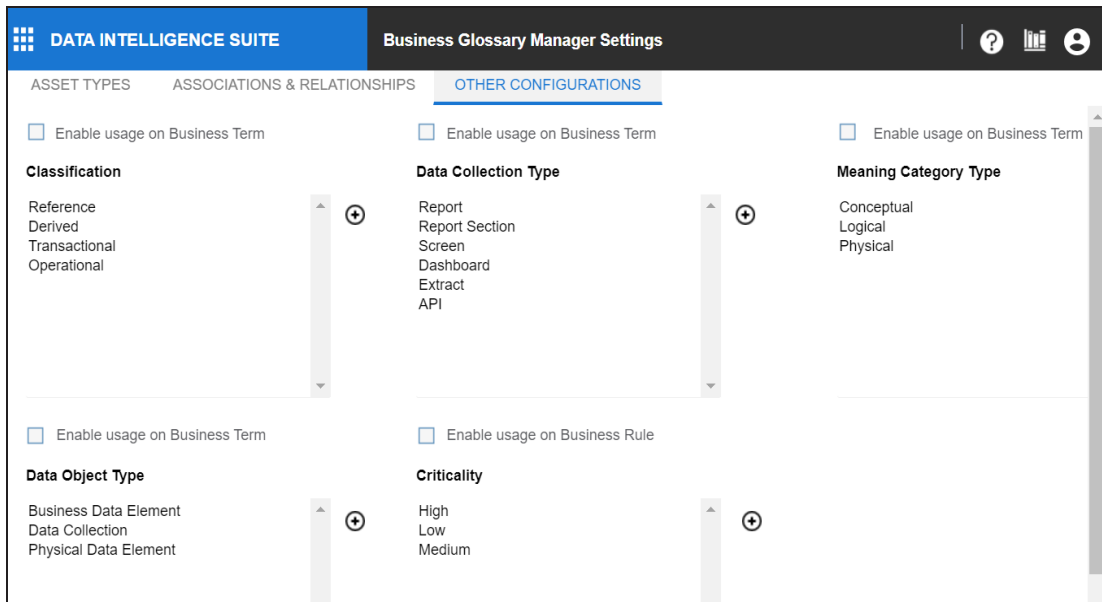
Summary of Relationships						
#	Source Asset Type	Target Asset Type	Forward Relationship	Reverse Relationship	Description	Options
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
1	Business Terms	Business Terms				  
			is associated with	derives from		  

Other Configurations

Apart from the asset type and associations and relationship settings, you can configure other common properties of asset types, such as their visibility on the dashboard, classification, data collection type, and more. These properties appear as drop-down lists on the asset pages in the Business Glossary Manager.

To configure common properties, follow these steps:


1. Go to **Application Menu > Settings > Business Glossary Manager**.
The Business Glossary Manager Settings page appears. By default, it opens the Asset Types settings.
2. Go to the **Other Configurations** tab.

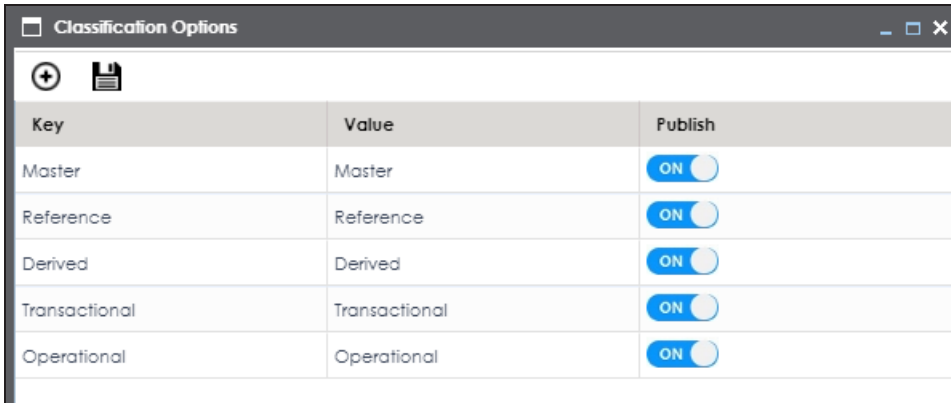


3. Select **Enable usage on Business Term** or **Enable usage on Business Rule** to select the properties that you want to enable for Business Terms and Business Rules.
You can add, and enable or disable the options available under each property. For more information, refer to the [Edit Property Options](#) section.
4. Under Dashboard Visibility, select the asset types that are available on the Business Glossary Manager dashboard.

Edit Property Options

To edit property options, follow these steps:

1. Under a property, click  .
The options page appears.
For example, the Classification Options page.



Key	Value	Publish
Master	Master	<input checked="" type="checkbox"/>
Reference	Reference	<input checked="" type="checkbox"/>
Derived	Derived	<input checked="" type="checkbox"/>
Transactional	Transactional	<input checked="" type="checkbox"/>
Operational	Operational	<input checked="" type="checkbox"/>

2. Use the following options:

Add

This adds a blank Key-Value pair to the options list. In the blank option row, double-click the fields under **Key** and **Value** columns. Then, enter the new option in each field.

By default, the Publish setting of the new option is set to ON. This indicates that the option will be available in the drop-down list on the asset page.

Publish

Use the switch to enable or disable an option.

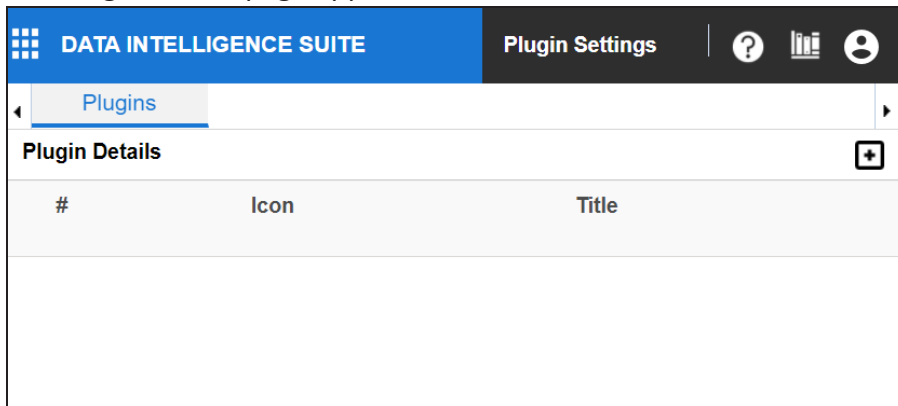
Configuring Plugins


The plugin framework allows you to organise and keep third party applications like automated testing framework, and Discovery BI module.

To configure plugins, follow these steps:

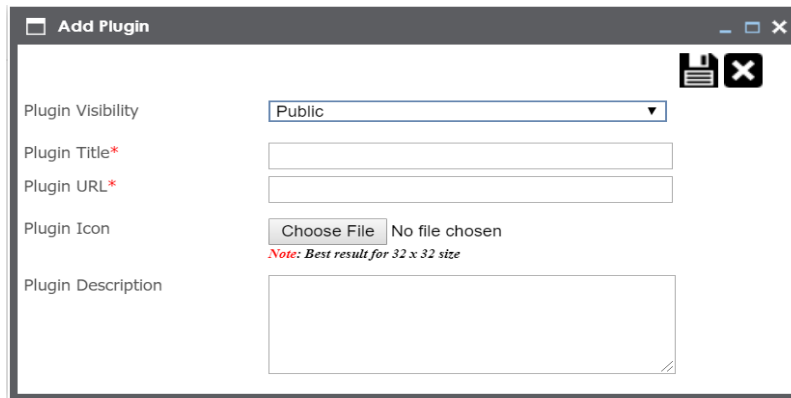
1. Go to **Application Menu > Settings > Plugins**.

The Plugin Details page appears.



2. To add plugins, click .

The Add Plugin page appears.



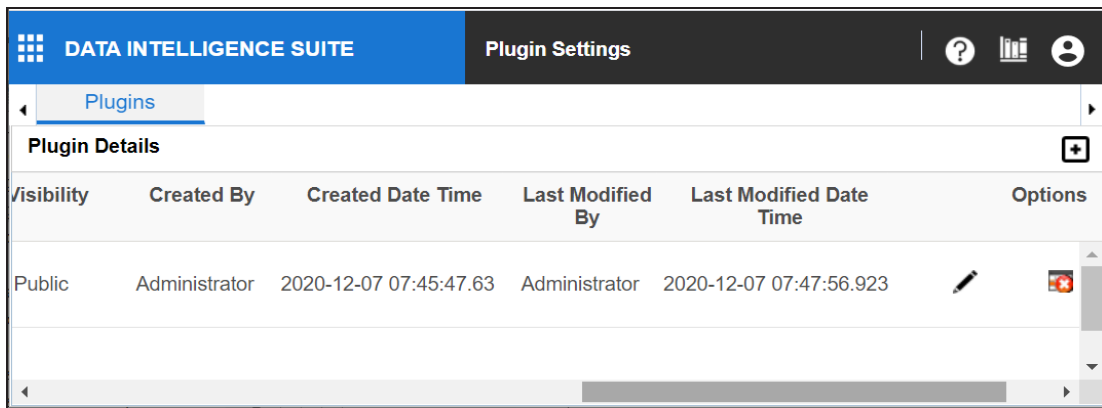
3. Enter appropriate values to the fields. Fields marked with red asterisk are mandatory. Refer to the following table for field descriptions.

Configuring Plugins



Field Name	Description
Plugin Visibility	Select appropriate plugin visibility. <ul style="list-style-type: none">▪ Choose Private to restrict its visibility to yourself.▪ Choose Public to make it visible to all the users.
Plugin Title	Type a unique plugin title.
Plugin URL	Enter the plugin URL.
Plugin Icon	Use Choose File to browse and select the plugin icon image.
Plugin Description	Type a small plugin description.

4. Click .

The Plugin is added to the Plugin Details list.



The screenshot shows the 'DATA INTELLIGENCE SUITE' interface with 'Plugin Settings' selected. A 'Plugins' tab is active, displaying a 'Plugin Details' table. The table has columns for Visibility, Created By, Created Date Time, Last Modified By, Last Modified Date Time, and Options. One plugin is listed with the following details:

Visibility	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Options
Public	Administrator	2020-12-07 07:45:47.63	Administrator	2020-12-07 07:47:56.923	 

Use the following options:

Edit

To edit plugin details, use .

Delete

To delete plugins, use .

Configuring Miscellaneous Settings

On the Miscellaneous Settings page, you can set up different modules with respect to:

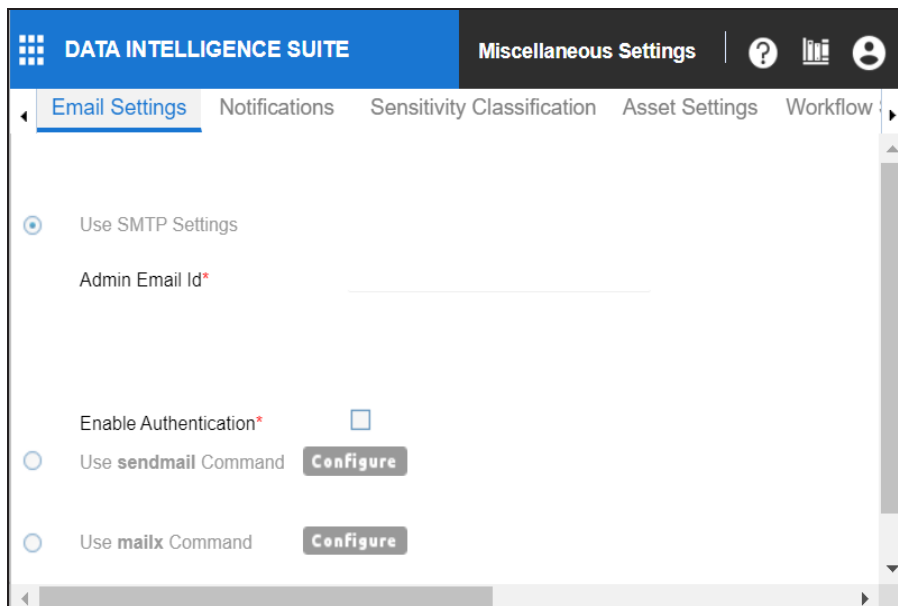
- [Email Settings](#): Under this, you can configure outbound email notifications to users. You can use SMTP server or configure different commands in the Linux environment to send outbound emails.
- [Notification](#): Under this, you can configure email notifications to users when Sensitive Data Indicator (SDI) classification task is complete.
- [Sensitivity classification](#): Under this, you can configure sensitive data indicator classifications.
- [DQLab Configuration](#): Under this, you can configure a DQLabs instance and schedule a DQLabs job.
- [Asset Settings](#): Under this, you can configure the appearance of Metadata Assets and Enterprise Tags on mind maps. You can also configure whether user assignment is enforced on Metadata Manager and Business Glossary Manager dashboards.
- [Workflow Settings](#): Under this, you can set the first stage applicable to all workflows and control the appearance of previous stages on the workflow screen.
- [Language Settings](#): Under this, you can configure UI field labels in different languages.
- [License Renewal Reminder](#): Under this, you can send license reminder emails to any concerned person and set the frequency of the reminders.
- [Form Validation Settings](#): It enables you to create and configure the forms for the Table Properties, Column Properties, and Environment Properties tabs in the Metadata Manager.
- [Mapping Lineage Sync](#): Under this, you can sync mapping records with lineage tables in case of any disruption.
- [ALM Configuration](#): Under this, you can integrate HP ALM (Application Life Cycle Management), a third party tool with the Test Manager.
- [Menu Theme](#): Under this, you can configure menu theme of the application.

Configuring Miscellaneous Settings

- [Security Setting](#): Under this, you can configure secure exit and integrated help availability.
- [Business Entity Types](#): Under this, you can configure background color, text color, and icon of business entities.

To access Miscellaneous Settings page, go to **Application Menu > Settings > Miscellaneous**.

The Miscellaneous Settings page appears:



Configuring Email Settings

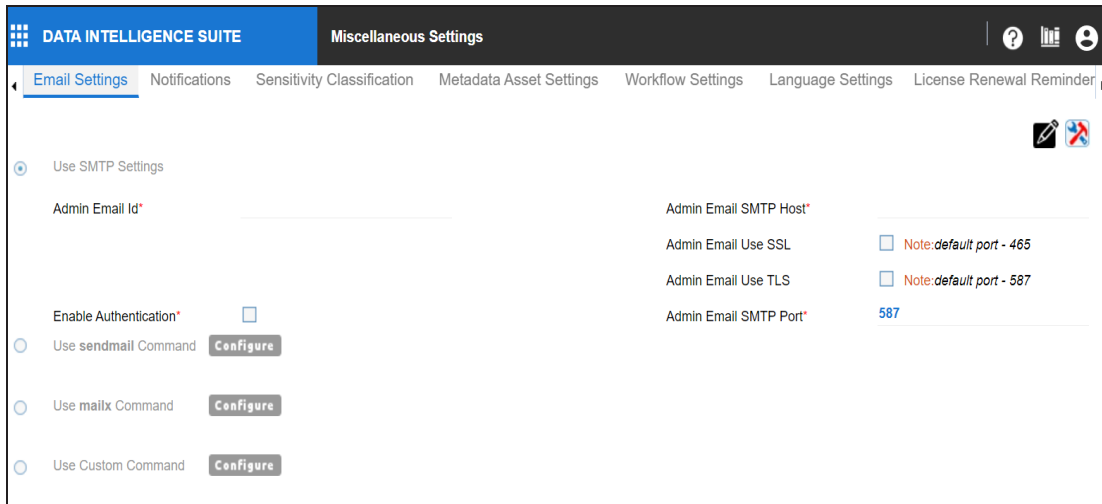
You can configure Admin Email Id to send notifications to the users of erwin Data Intelligence (erwin DI). It involves using:


- SMTP settings
- sendmail command
- mailx command
- Custom Command

To configure email settings, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous**.

The Miscellaneous Settings page appears and the Email Settings tab opens.



2. Click .
3. Use one of the following options:

Use SMTP Settings

You can use this option, if your organization is using SMTP server to send out-bound emails.

To configure the SMTP Settings, follow these steps:

Configuring Email Settings

1. Select **Use SMTP Settings**.
2. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Admin Email Id	Specifies the email id being used to send the notifications. For example, polydude.alice@gmail.com
Enable Authentication	Specifies whether the SMTP host requires authentication using the Admin Email User Name and Admin Email User Password. Select the Enable Authentication check box to enable authentication using Admin Email User Name and Admin Email User Password.
Admin Email User Name	Specifies the email id being used to send the notifications. For example, polydude.alice@gmail.com
Admin Email User Password	Specifies the password to log on the Admin Email Id. For example, goerwin@1.
Admin Email SMTP Host	Specifies the SMTP host. For example, smtp.gmail.com
Admin Email Use SSL	Specifies whether SMTP host uses SSL. Select the Admin Email Use SSL check box if SMTP host uses SSL.
Admin Email Use TLS	Specifies whether SMTP host uses TLS. Select the Admin Email Use TLS check box if SMTP host uses TLS.
Admin Email SMTP Port	Specifies the SMTP port. For example, 587.

Use sendmail Command

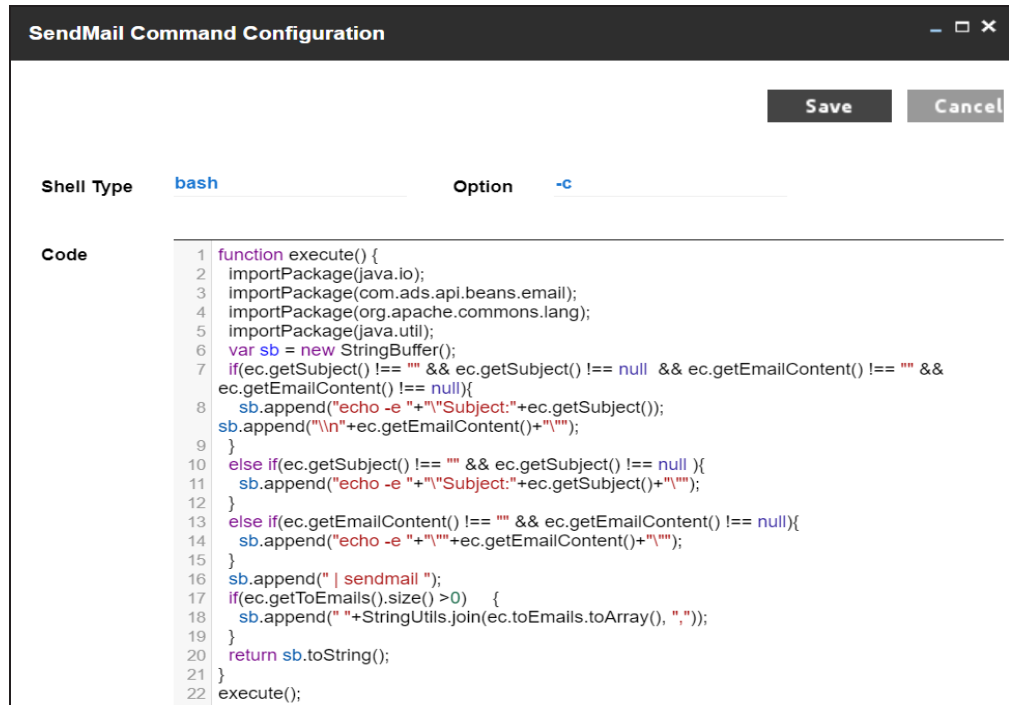
Configuring Email Settings

You can use this option, if you are using Linux environment and want to use sendmail command to send email notifications.

To configure the sendmail command, follow these steps:

1. Select **Use sendmail Command**.
2. Click **Configure**.

The following page appears:



```
1 function execute() {
2 importPackage(java.io);
3 importPackage(com.ads.api.beans.email);
4 importPackage(org.apache.commons.lang);
5 importPackage(java.util);
6 var sb = new StringBuffer();
7 if(ec.getSubject() != "" && ec.getSubject() != null && ec.getEmailContent() != "" &&
8 ec.getEmailContent() != null){
9 sb.append("echo -e "+ec.getSubject()+ec.getSubject());
10 sb.append("\n"+ec.getEmailContent()+"\n");
11 }
12 else if(ec.getSubject() != "" && ec.getSubject() != null ){
13 sb.append("echo -e "+ec.getSubject()+ec.getSubject()+"\n");
14 }
15 else if(ec.getEmailContent() != "" && ec.getEmailContent() != null){
16 sb.append("echo -e "+ec.getEmailContent()+ec.getEmailContent()+"\n");
17 }
18 sb.append(" | sendmail ");
19 if(ec.getToEmails().size() > 0) {
20 sb.append(" "+StringUtils.join(ec.toEmails.toArray(), ", "));
21 }
22 return sb.toString();
23 }
execute();
```

3. Configure the sendmail command.
4. Click **Save**.

The sendmail command is configured.

Use mailx Command

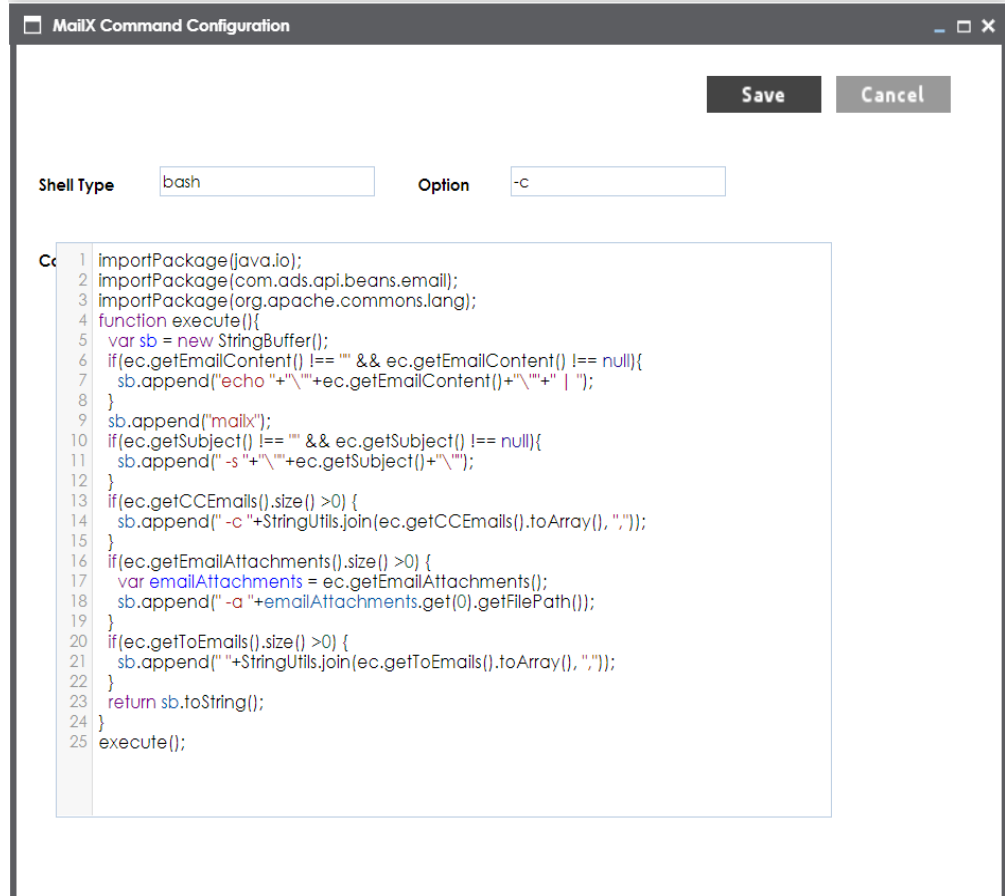
Use this option, if you are using Linux environment and want to use mailx command to send email notifications.

To configure the mailx command, follow these steps:

Configuring Email Settings

1. Select Use mailx Command.
2. Click **Configure**.

The MailX Command Configuration page appears.



3. Configure the mailx command.
4. Click **Save**.

The mailx command is configured.

Use Custom Command

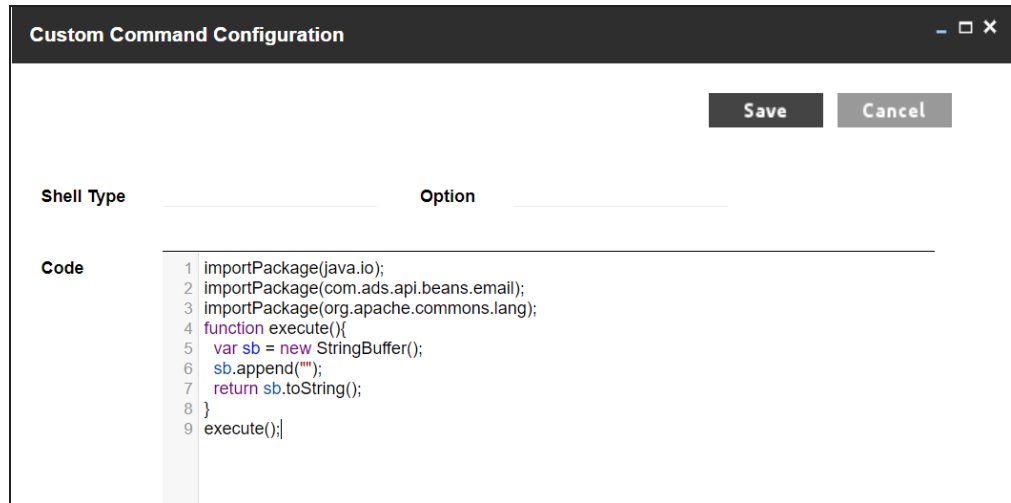
Use this option, if you are using Linux environment and want to use a custom command to send emails.

To configure a custom command, follow these steps:

Configuring Email Settings



1. Select **Use Custom Command**.
2. Click **Configure**.

The Custom Command Configuration page appears.



3. Configure the custom command.
4. Click **Save**.

The custom command is configured.

4. Click .
5. Click  to test the email settings.

The Email Settings page appears.

Configuring Email Settings

Email Settings

From* abc@abc.com

To* abc@abc.com

Cc


Note* : Please provide CC List with comma(,) separated values

Subject

Email Body

Attachment(s) Drag-n-Drop files here or click to select files for upload.

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

Field Name	Description
From	Type the Admin Email Id from which you wish to send email notifications.
To	Type a test email ID to which you want to send email.
CC	Type email IDs of secondary recipients.
Subject	Type the subject of the test email.
Email Body	Type the email body of the test email.
Attachment (s)	To attach files, drag and drop files or use  to browse and select files.

7. Click **Send**.

The success message validates your email settings.

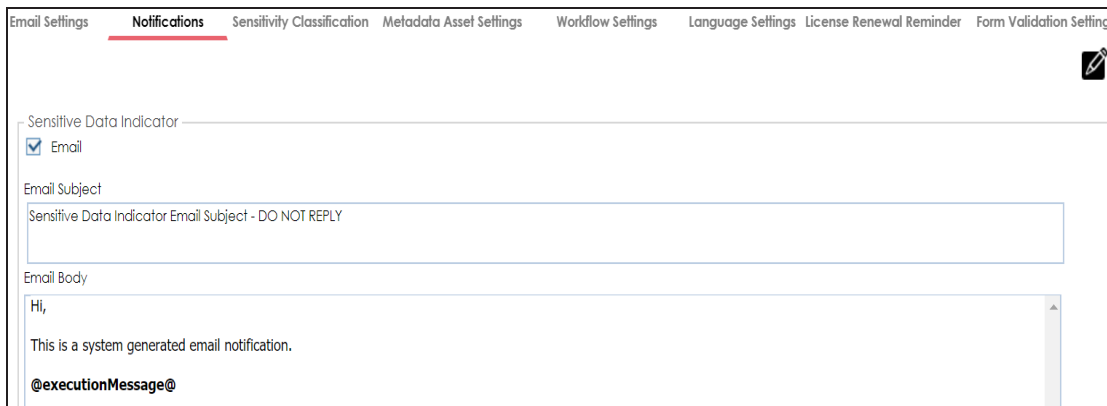
Configuring Sensitivity Update Notifications

You can configure email notifications to be sent whenever asset sensitivity is updated in bulk. These notifications are sent from the [administrator's email ID](#) when bulk sensitivity update is complete.

To configure sensitivity update notifications, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Notification.**

The following page appears.



The screenshot shows a web interface for configuring notifications. The top navigation bar includes 'Email Settings', 'Notifications' (highlighted), 'Sensitivity Classification', 'Metadata Asset Settings', 'Workflow Settings', 'Language Settings', 'License Renewal Reminder', and 'Form Validation Setting'. The main content area is titled 'Sensitive Data Indicator' and contains three sections: 'Email' with a checked checkbox, 'Email Subject' with a text input field containing 'Sensitive Data Indicator Email Subject - DO NOT REPLY', and 'Email Body' with a text area containing 'Hi, This is a system generated email notification. @executionMessage@'. A save icon is visible in the top right corner.

2. Click .
3. Use the following options:

Email

Select the check box to turn on email notifications to users when they update asset sensitivity in bulk.

Email Subject

You can edit the default email subject and use a custom email subject.

Email Body

You can edit the default email content and add custom content.

4. Click .

The sensitivity update notifications are configured.

Configuring Sensitivity Classifications

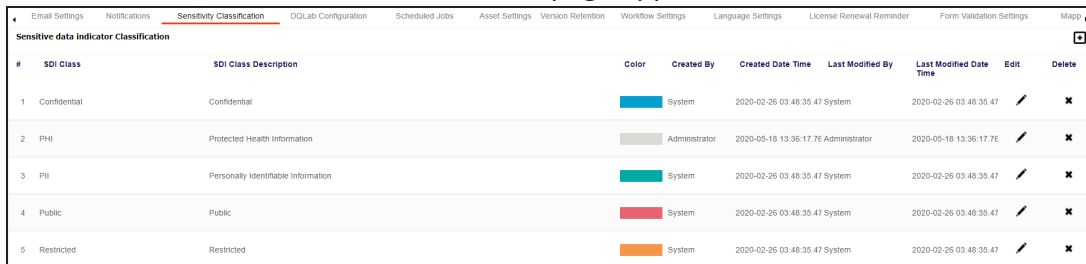
You can configure sensitive data indicator (SDI) classifications to classify sensitivity of:
















- Columns
- Tables
- Environments
- Systems
- Business terms
- Business rules
- Business policies
- Other business assets

To configure sensitive data indicator classifications, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Sensitivity Classification**.

The Sensitive data indicator Classification page appears.

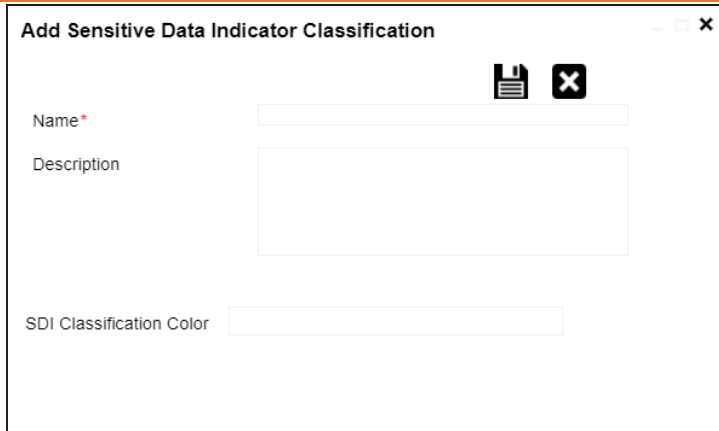


#	SDI Class	SDI Class Description	Color	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Confidential	Confidential		System	2020-02-26 03:48:35.47	System	2020-02-26 03:48:35.47		
2	PHI	Protected Health Information		Administrator	2020-05-18 13:36:17.76	Administrator	2020-05-18 13:36:17.76		
3	PII	Personally Identifiable Information		System	2020-02-26 03:48:35.47	System	2020-02-26 03:48:35.47		
4	Public	Public		System	2020-02-26 03:48:35.47	System	2020-02-26 03:48:35.47		
5	Restricted	Restricted		System	2020-02-26 03:48:35.47	System	2020-02-26 03:48:35.47		

2. Click .

The Add Sensitive Data Indicator Classification page appears.

Configuring Sensitivity Classifications



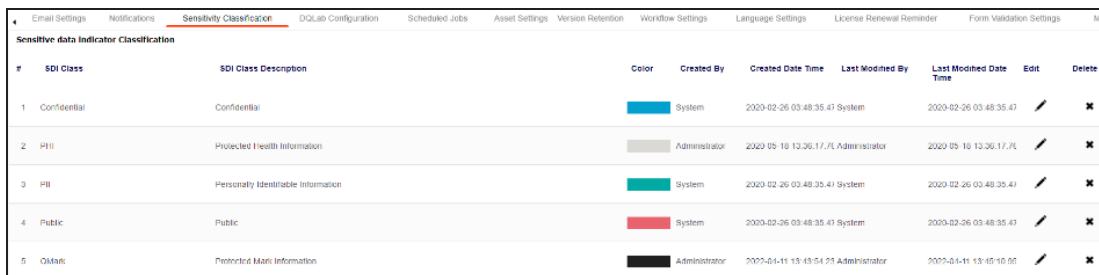
3. Enter **Name**, **Description**, and **SDI Classification Color**.
















For example:

- Name - QMark
- Description - Protected Mark Information.
- SDI Classification Color - #303030

4. Click .

The classification is added and saved under the Sensitive data indicator Classification grid.



#	SDI Class	SDI Class Description	Color	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Confidential	Confidential		System	2020-02-26 03:48:35.47	System	2020-02-26 03:48:35.47		
2	PII	Protected Health Information		Administrator	2020-05-18 13:36:17.75	Administrator	2020-05-18 13:36:17.75		
3	PHI	Personally Identifiable Information		System	2020-02-26 03:48:35.47	System	2020-02-26 03:48:35.47		
4	Public	Public		System	2020-02-26 03:48:35.47	System	2020-02-26 03:48:35.47		
5	QMark	Protected Mark Information		Administrator	2020-04-11 13:45:54.21	Administrator	2020-04-11 13:45:10.05		

Use the following options:

Edit 

Use this option to edit the SDI classification's name and description.

Delete 

Configuring Sensitivity Classifications

Use this option to delete the SDI classification.

Configuring DQLabs

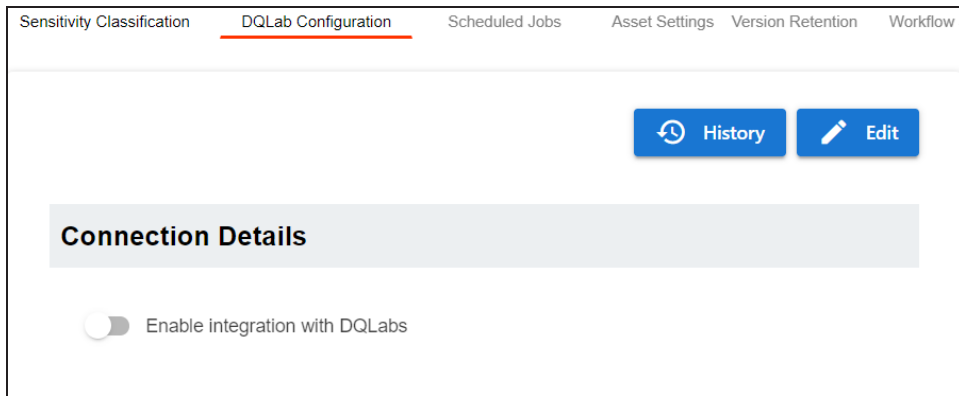
Data quality scores (DQ score) enable you to measure your data's quality. A higher DQ score indicates better accuracy and completeness of data. To provide data quality capabilities, erwin Data Intelligence (erwin DI) integrates DQLabs as data quality analysis partner. To be able to run data quality profiling, you need to configure DQLabs in your erwin DI application.

Configure DQLabs in erwin DI also requires Client Id and Client Secret details available in your DQLabs instance. To get configuration details from DQLabs instance, refer to [Accessing DQLabs Configuration Details](#).

To configure DQLabs, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > DQLabs Configuration**.

The DQLabs Configuration tab opens.



2. Click .

The DQLabs Configuration tab switches to edit mode.

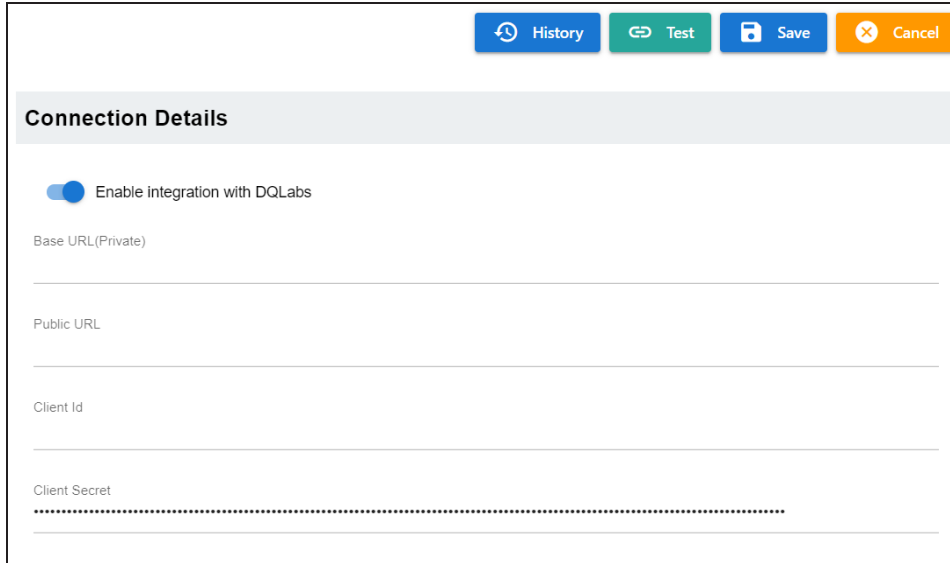
3. On the Connection Details section, switch **Enable Integration with DQLabs** to **ON**.

The connection details for DQLabs configuration appear in edit mode.



This configuration requires Client ID and Client Secret from your DQLabs instance. To get configuration details from DQLabs instance, refer to [Accessing DQLabs Configuration Details](#).

Configuring DQLabs




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

Field Name	Description
Base URL (Private)	Specifies the base URL of your DQLabs instance. For example, https://cloud.dqlabs.ai
Public URL	Specifies the public URL of your DQLabs instance. For example, https://cloud.dqlabs.ai
Client Id	Specifies the alphanumeric client ID of your DQLabs instance. For example, 2ax1x3xde-b8x8-4b134-aa08-xxx303p2b86f1fk
Client Secret	Specifies the client secret of your DQLabs instance.

5. Click .

The DQLabs configuration is saved.


To test the configuration, click . If the connection with the DQLabs instance is established successfully, then a success message appears.

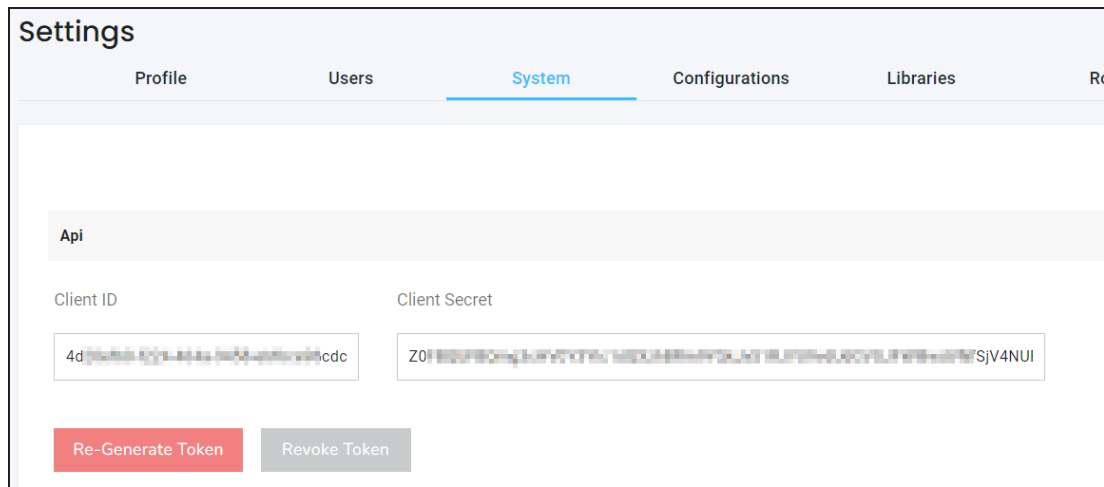
You can then access it from erwin DI. To access DQLabs, go to **Application Menu > Data Quality**.


The next steps involve adding datasets in the DQLabs and then, [scheduling a DQLabs job](#).

Accessing DQLabs Configuration Details

To access Client Id and Client Secret in your DQLabs instance, follow these steps:

1. Login to DQLabs.
Your DQLabs instance opens.
2. On the app menu, click  > **Setting** > **Organization** tab.
3. Click **Edit**, then go to **Systems** tab and expand **Api** section.
The Api section displays the Client Id and Client Secret.



4. Hover over the values and click  to copy them, and paste them into erwin DI's [DQLabs Configuration](#) section.

Scheduling DQLabs Jobs

After successfully adding datasets in the configured DQLabs instance, ensure that DQLabs pulls, senses, profiles, curates, and push all the datasets. Now, you are ready to fetch DQ scores in erwin Data Intelligence. To fetch DQ scores for these data sets, you need to schedule DQLabs jobs in erwinDI.


To schedule DQLabs jobs, follow these steps:

1. On the **DQLabs Configuration** tab, go to **Scheduler Details** section. The Scheduler Details appears.

The screenshot shows the 'DQLabs Configuration' tab selected in a navigation bar. Below the navigation bar are three buttons: 'History' (blue with a refresh icon), 'Test' (green with a play icon), and 'Edit' (blue with a pencil icon). The main content area is titled 'Scheduler Details' and contains the following fields:



- Job Name: Data Quality Synd
- Schedule Job On: 04-21-2022 10:08 (with a calendar and clock icon)
- Local: Server:
- Interval: Only Once (with a dropdown arrow)
- Send Email:
- Primary Email: abc@abc.com
- CC Email Ids: (with a dropdown arrow)

At the bottom of the form, there is a note: 'Hit the enter key for multiple emails'.

2. Click  **Edit**. The DQLabs Configuration tab switches to edit mode.

Scheduling DQLabs Jobs


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



Field Name	Description
Job Name	Specifies the job name. This field autopopulates with a read-only job name.
Schedule Job On	Specifies the date and time of the job. Use  to select a date, and  to select a time. For example, 11-01-2021 16:41.
Local or Server	Specifies whether the job uses local or server time. <ul style="list-style-type: none">▪ Local: Indicates that the job refers to the local machine▪ Server: Indicates that the job refers to the machine where your application is deployed
Interval	Specifies the frequency of the job. <ul style="list-style-type: none">▪ Once: Indicates that the job runs only once▪ Every Day: Indicates that the job runs every day▪ Every Week: Indicates that the job runs every week▪ Every Month: Indicates that the job runs every month
Send Email	Switch Send Email to ON to receive a job notification.
Primary Email	This field is autopopulated with your email ID. You receive email notifications about the scheduled job from the administrator's email ID. For example, Chris.Duck@erwin.com
CC List	Specifies a list of email IDs that should receive email notifications about the scheduled job. Hit enter after each to add multiple email IDs. For example, Christopher.Lewis@erwin.com, Amy.Ivan@erwin.com

4. Click **Schedule**.

The DQLabs fetches data quality analysis results, such as DQ Score, Impact Score, and Drift Alert at the scheduled time.

Scheduling DQLabs Jobs

To view activity logs related to the DQLabs jobs, click  [History](#). These logs include details of the jobs run by all users.

Activity Log				
#	Type	Details	Date	User
2		Status : Success Message : Get Score Successfully Environment : Quest_Warehouse System : SQL System	10/29/2021 06:44:00	Administrator
1		Status : Success Message : Get Score Successfully Environment : Quest_Warehouse System : SQL System	10/29/2021 06:37:00	Administrator

Configuring Scheduled Jobs

This tab allows you to configure scheduled metadata scan for an environment whose schema was selected or it was scanned at least once. In this screen, you can view scheduled job name, job type, objects, previous and next fire time, job state, and other creation details. Also, you can delete scheduled jobs.

To delete scheduled jobs, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Scheduled Jobs.**

The following page appears.

#	Job Name	Job Type	Scheduled Objects	Previous Fire Time	Next Fire Time	Job State	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Action
1	Administrator1584599690483	Metadata Scan	SNOWFLAKE_SAMPLE_DATA TP	04-07-2022 06:34	04-08-2022 06:34	NORMAL	Administrator	2020-03-19 02:37:56.13	Administrator	2020-03-19 02:37:56.13	✕
2	164932005814	Metadata Scan	DBO		04-11-2022 08:26	NORMAL	Administrator	2022-04-07 08:27:18.736	Administrator	2022-04-07 08:27:18.736	✕
3	Administrator1586866769527	Metadata Scan	dbo	04-06-2022 13:57	04-07-2022 13:57	NORMAL	Administrator	2020-05-05 13:55:50.561	Administrator	2020-05-05 13:55:50.561	✕
4	1645319992338	Metadata Scan	DBO		04-06-2022 08:26	NORMAL	Administrator	2022-04-07 08:26:41.144	Administrator	2022-04-07 08:26:41.144	✕

2. Click ✕ .

The scheduled job is deleted.





Configuring Asset Settings


You can configure the appearance of Metadata Assets and Enterprise Tags on mind maps with respect to the display color and label. You can also configure whether Metadata Manager and Business Glossary Manager dashboard display derived from all assets or only those that are assigned to you.

To configure asset settings, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Asset Settings**.


The following page appears.

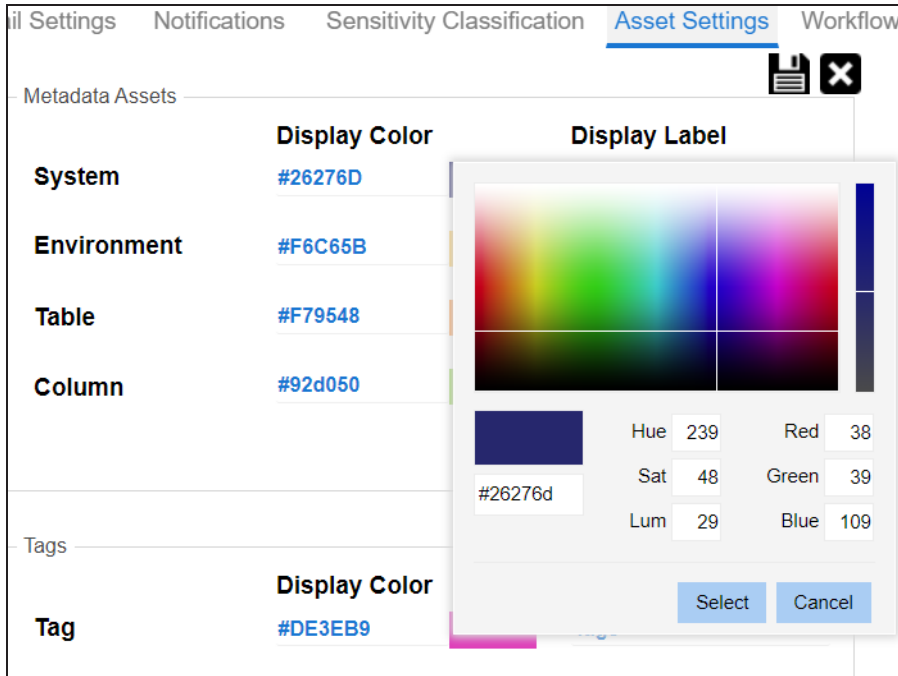
Metadata Assets			
	Display Color		Display Label
System	#26276D 		System
Environment	#F6C65B 		Environment
Table	#F79548 		Tables
Column	#92d050 		Columns


Tags		
Tag	Display Color	Display Label
Tag	#DE3EB9 	Tags

Dashboards	
Enforce User Assignment In Metadata Manager	<input type="checkbox"/> OFF
Enforce User Assignment In Business Glossary Manager	<input type="checkbox"/> OFF

Configuring Asset Settings

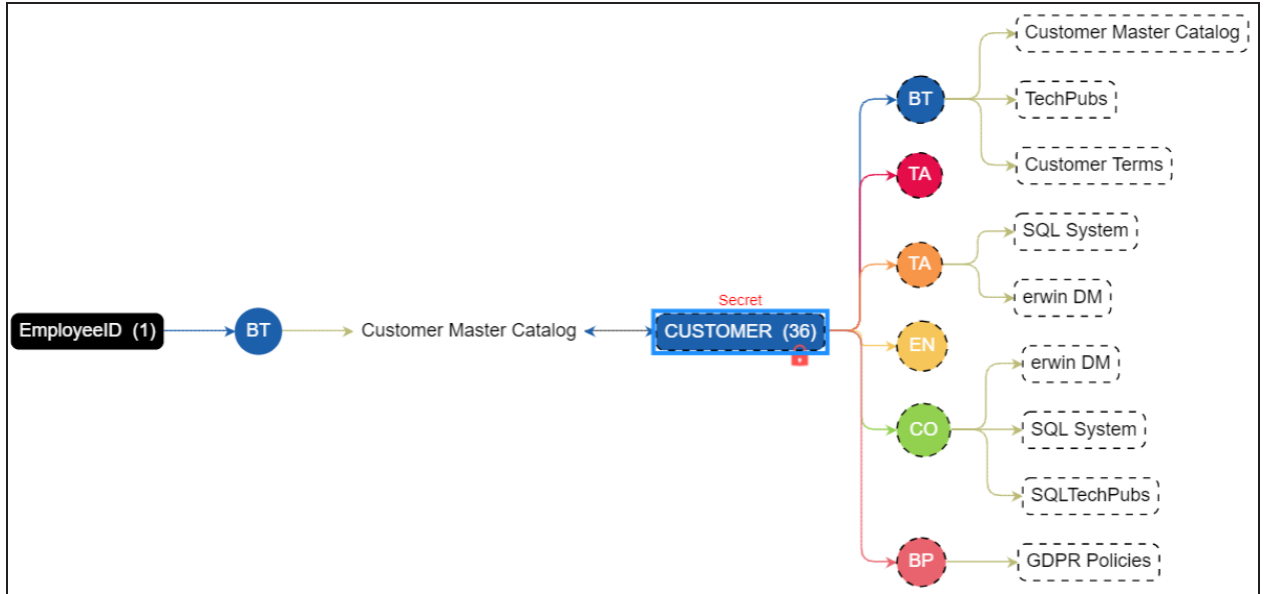
2. Click .
3. Under the Metadata Assets and Tags section, click the required display color box. Then select a color on the color card and click **Select**.



4. Next, under the Metadata Assets and Tags section, click the required display label box. Then, enter a label.
5. Click .

Metadata assets and tags appear in the mind map in selected colors and with configured display labels.

Configuring Asset Settings



By default, when you log in, Metadata Manager and Business Glossary Manager dashboard appear. To view personalized dashboards, follow these options:

- **Enforce User Assignment in Metadata Manager:**
Switch **Enforce User Assignment in Metadata Manager** to **ON** to derive data information based on your assignments of technical assets and display it on Metadata Manager Dashboard.
- **Enforce User Assignment in Business Glossary Manager:**
Switch **Enforce User Assignment in Business Glossary Manager** to **ON** to derive data information based on your assignments of business assets and display it on Business Glossary Dashboard.

Configuring Workflow Settings

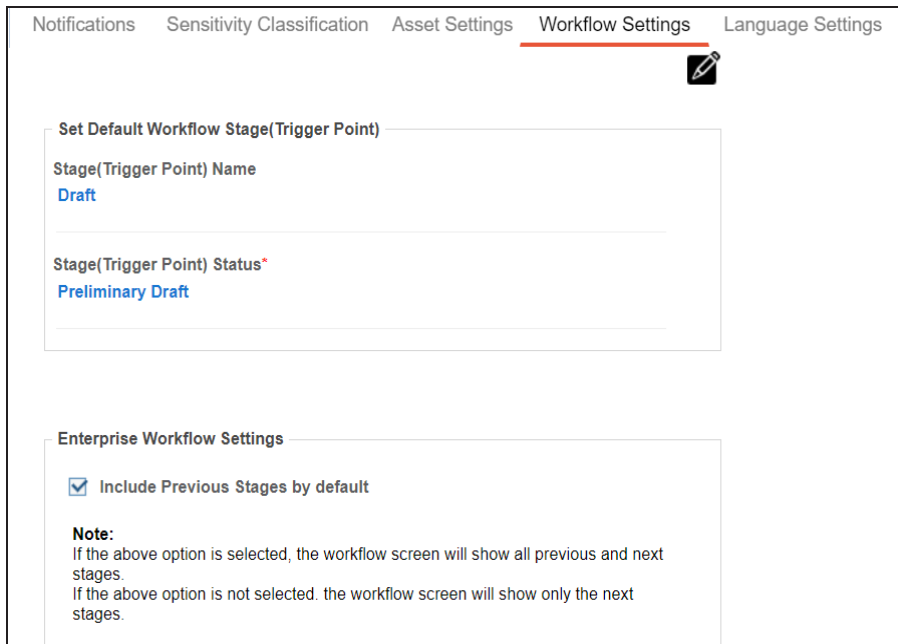
You can configure the following on the Workflow Settings tab:

- **Set Default Workflow Stage (Trigger Point):** You can set a default first stage of workflows.
- **Enterprise Workflow Settings:** You can control the appearance of previous stages on the workflow screen.

To configure workflow settings, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Workflow Settings**.

The following page appears.



The screenshot shows a web interface with a navigation bar at the top containing the following tabs: Notifications, Sensitivity Classification, Asset Settings, Workflow Settings (which is underlined and has a pencil icon next to it), and Language Settings. Below the navigation bar, there are two main configuration sections. The first section is titled "Set Default Workflow Stage(Trigger Point)" and contains two input fields. The first field is labeled "Stage(Trigger Point) Name" and has the value "Draft" entered. The second field is labeled "Stage(Trigger Point) Status*" and has the value "Preliminary Draft" entered. The second section is titled "Enterprise Workflow Settings" and contains a checkbox labeled "Include Previous Stages by default" which is checked. Below the checkbox is a "Note:" section with the following text: "If the above option is selected, the workflow screen will show all previous and next stages. If the above option is not selected. the workflow screen will show only the next stages."

2. Click .

3. Use the following sections:

Set Default Workflow Stage(Trigger Point)

Configuring Workflow Settings

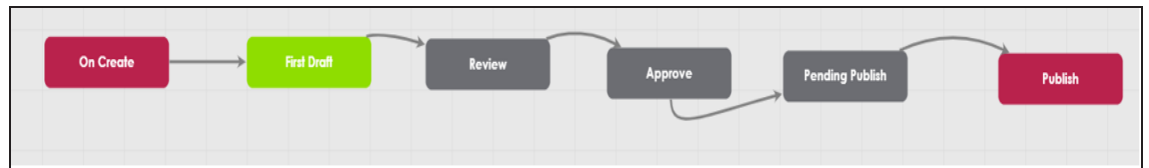
Use this section to configure a default first stage of workflows. This stage is applicable to all workflows. By default, both, the stage name and status, are set to Draft.

To set the default first stage, use the following options:

Stage(Trigger Point) Name

You can edit the first stage's name. This name is applicable to all workflows.

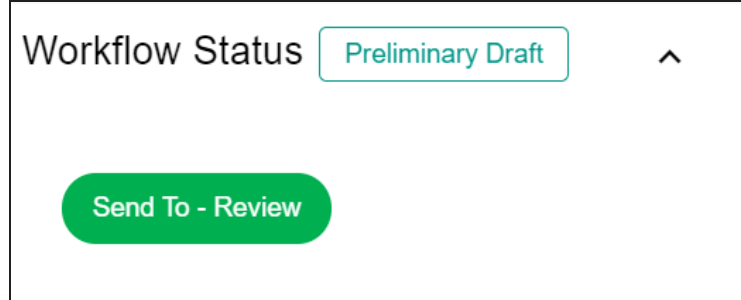
For example, the following image displays the first stage as First Draft.



Stage(Trigger Point) Status

You can edit the status that is displayed for the first stage. This status is applicable to all workflows.

For example, the following image displays the status of First Draft as Preliminary Draft for a business term.



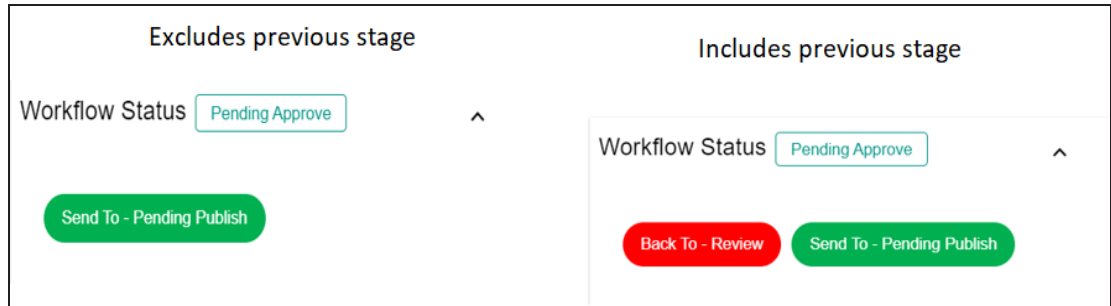
Enterprise Workflow Settings

Use this section to control the appearance of previous workflow stages on the workflow screen.

To include previous workflow stages, select the **Include Previous Stages by default** check box.

Configuring Workflow Settings

For example, the following image displays workflow status of a business term with and without a previous stage.



4. Click .

Workflow settings are configured.

Configuring Language Settings

You can configure UI labels in different languages that enables users to use erwin DI in their preferred languages. These UI labels can be edited as per your requirements.



You can set a user's language preference in the Resource Manager.

erwin DI supports the following languages:

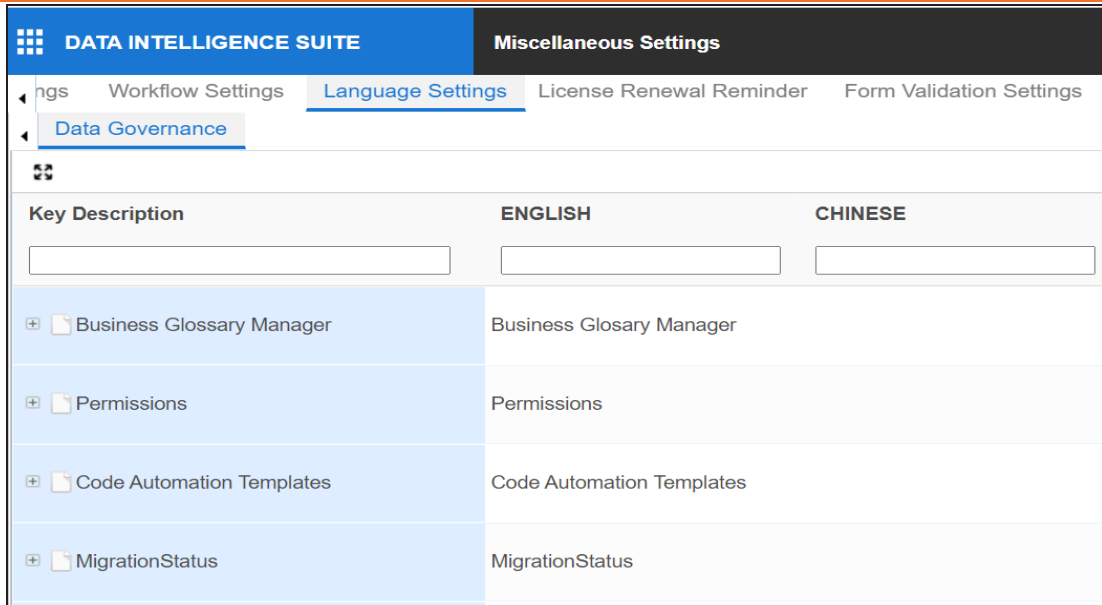
- English
- Chinese
- French
- German
- Hebrew
- Portuguese
- Russian
- Spanish

To configure UI labels in different languages, follow these steps:

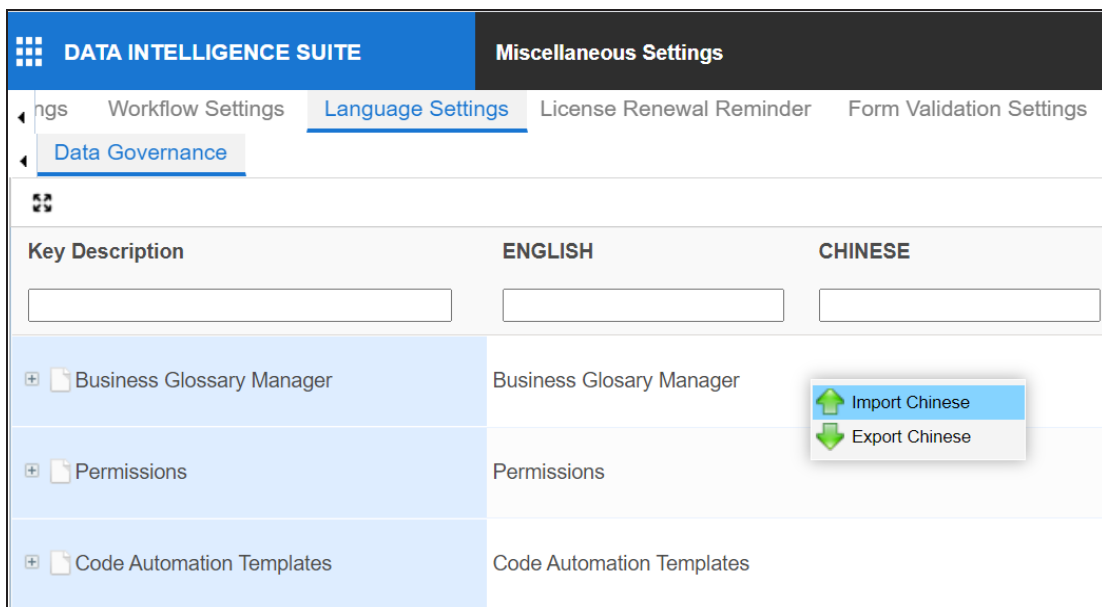
1. Go to **Application Menu > Settings > Miscellaneous > Language Settings**.

The following page appears. The keys are organized in a tree structure in the Key Description pane to help identify the location of the UI label in the application. By default, English UI labels are provided in the English Column.

Configuring Language Settings

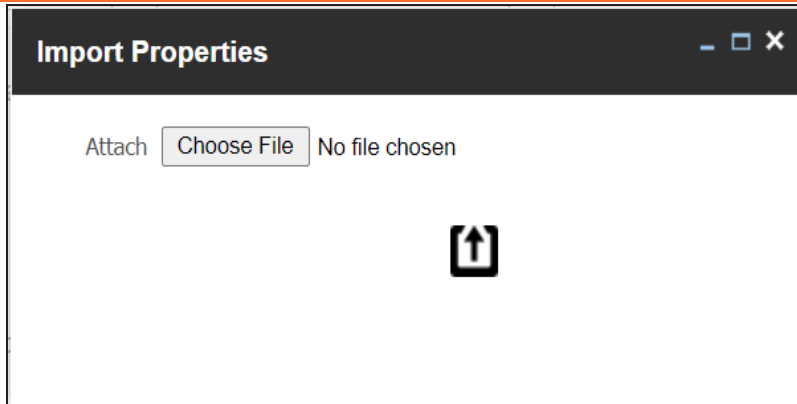


2. To upload UI labels in a required language, right-click a cell under the language column and select **Import <Language>**.




The Import Properties page appears.

Configuring Language Settings



3. To browse the properties file, click **Choose File**.



4. To upload the file, click .

The UI labels are uploaded, in the language column.

5. Click .

You can also export a property file for a language.

To edit a UI label, follow these steps:

1. Use  to expand the key description tree.
2. Double-click the corresponding cell and type the required UI label.
3. Click .



You can use your own UI labels for user defined fields, by editing the corresponding cells.

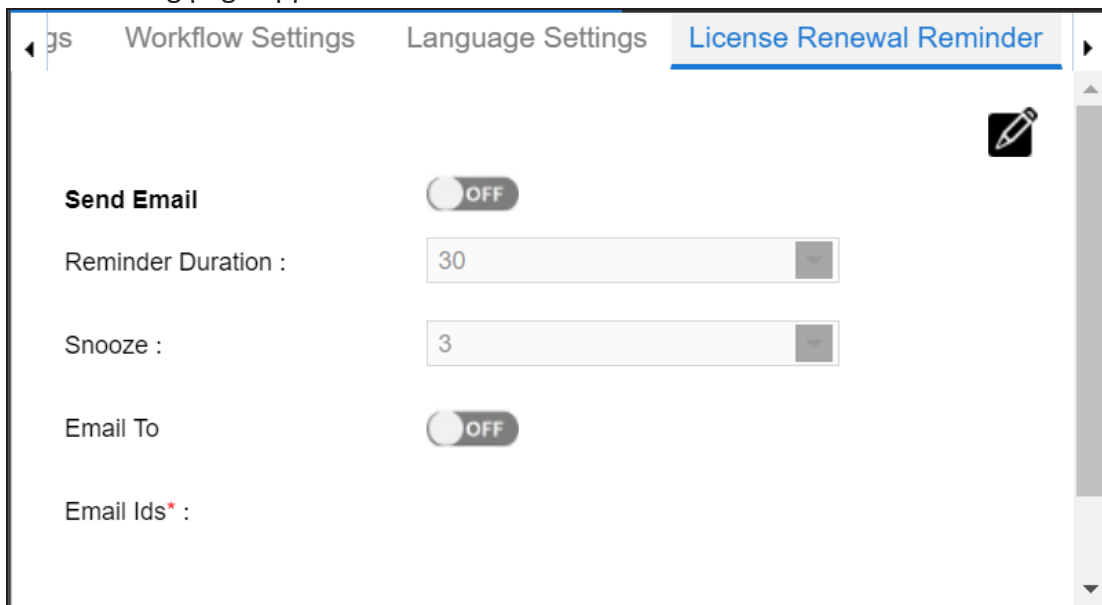
Configuring License Renewal Reminders

You can send license renewal reminders to a list of recipients from the administrator's email ID. You can also configure reminder time frames and snooze time in days.


To configure license renewal reminders, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > License Renewal Reminder**.

The following page appears.



The screenshot shows the configuration page for License Renewal Reminders. The breadcrumb trail is 'js > Workflow Settings > Language Settings > License Renewal Reminder'. The 'License Renewal Reminder' tab is selected. There is a pencil icon in the top right corner. The configuration options are: 'Send Email' (toggle OFF), 'Reminder Duration' (input field with '30'), 'Snooze' (input field with '3'), 'Email To' (toggle OFF), and 'Email Ids*' (empty field).

2. Click .
3. Use the following options to set reminders:

Send Email

Switch **Send Email** to **ON** to enable reminder emails.

Reminder Duration

You can select the reminder duration in days. For example, if you select 30, the reminder emails are sent thirty days prior to the license expiry.

Snooze

Configuring License Renewal Reminders

You can select the snooze time in days. For example, if you select 3, the reminder emails are sent daily, starting three days prior to the license expiry.

Email To

Switch **Email To** to **ON** to enable Email Ids box.

Email Ids

Enter the email IDs of users, who should receive the reminder emails.

4. Click .

License renewal reminders are configured.

Configuring Form Validation Settings

You can create and configure three different form types of the Metadata Manager:

- **Table Properties:** The form would be applicable to the Table Properties tab of a table.
- **Column Properties:** The form would be applicable to the Column Properties tab of a column.
- **Environment Properties:** The form would be applicable to the Environment Properties tab of an environment.

To create forms, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Form Validation Settings.**

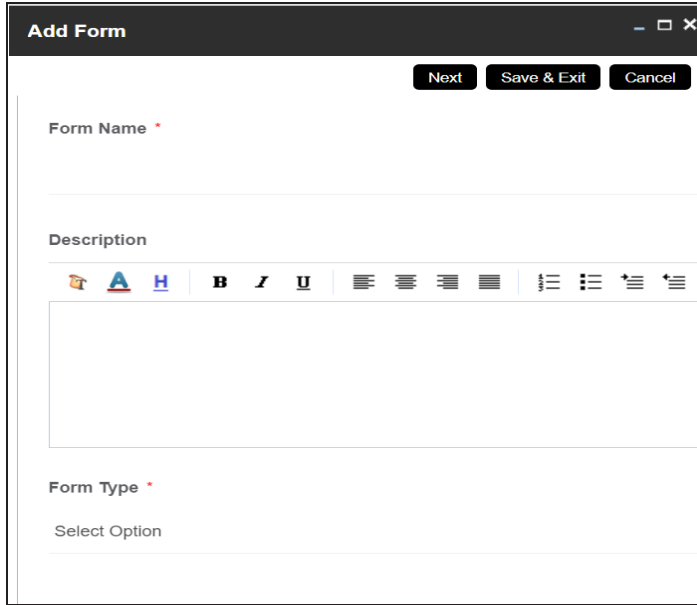
The following page appears.

#	Name	Description	Associated Objects	Base Form	Options
1	Table Properties - Metadata Manage	Default template to configure table field properties			
2	Column Properties - Metadata Mana	Default template to configure column field properties			
3	Environment Properties - Metadata I	Default template to configure environment field properties			

2. Click

The Add Form page appears.

Configuring Form Validation Settings



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

Field Name	Description
Form Name	Specifies the unique name of the form. For example, Adventureworks Metadata.
Description	Specifies the description about the form. For example: The form is to validate metadata in the Adventureworks environment.
Form Type	Specifies the type of the form. For example, Table Properties - Metadata Manager.

4. Click **Save & Exit**.

The form is created and saved in the form list.

Once a form is created, you can:

- [Configure form fields](#)
- [Associate the form with systems and environments](#)
- [Manage the form](#)

Configuring Form Fields

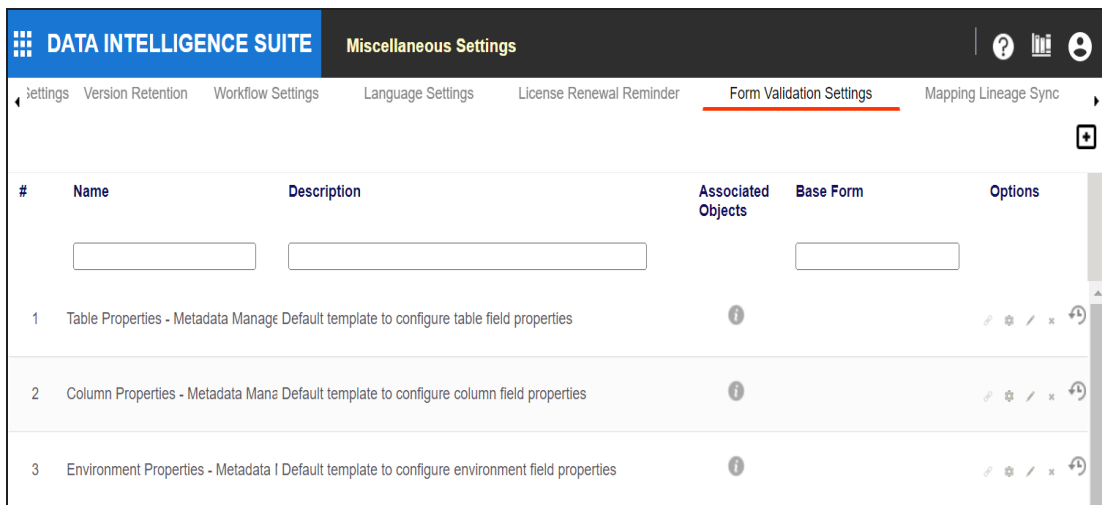
You can configure form fields and change its properties by:

- Making them mandatory
- Setting their default value
- Setting their regular expression
- Setting their order
- Making them visible

To configure form fields, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Form Validation Settings**.

The following page appears.

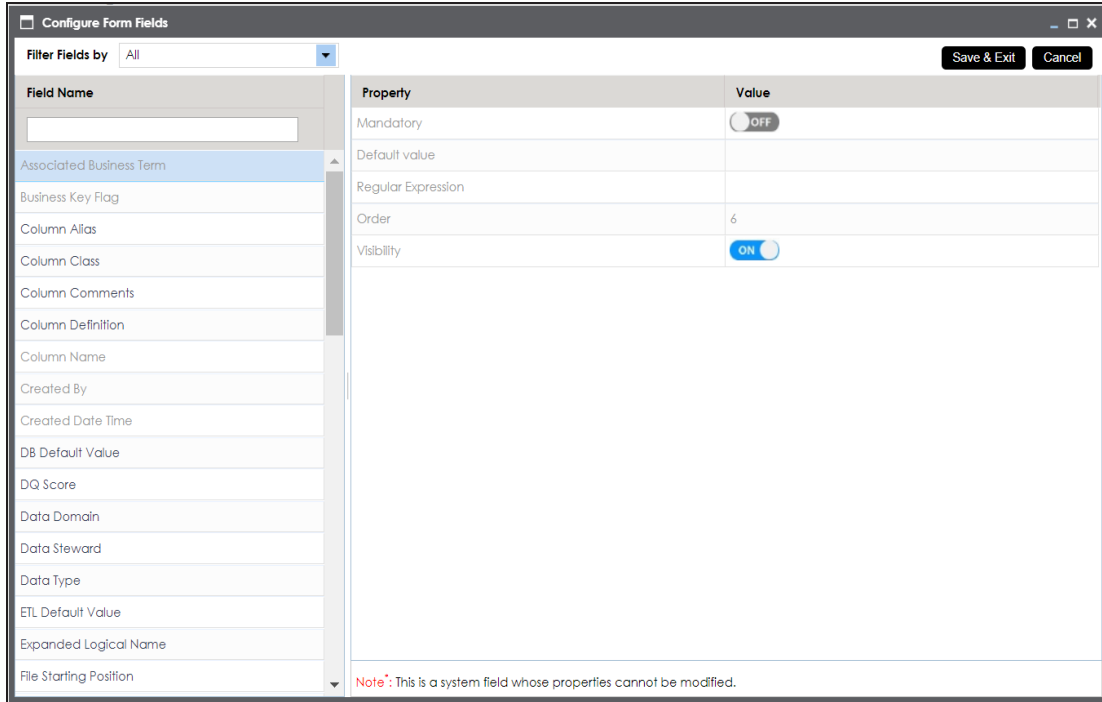


#	Name	Description	Associated Objects	Base Form	Options
1	Table Properties - Metadata Manage	Default template to configure table field properties			
2	Column Properties - Metadata Mana	Default template to configure column field properties			
3	Environment Properties - Metadata I	Default template to configure environment field properties			

2. Under the **Options** column, click .

The Configure Form Fields page appears.

Configuring Form Fields



3. Select the required <Field_Name> under the **Field Name** column.
4. Use the following options to change the properties of the field:

Mandatory

To make the selected field mandatory, switch **Mandatory** to **ON**.

Default Value

To set a default value for the selected field, type the default value.

Regular Expression

To set a regular expression for the selected field, type expressions inside the square brackets.

For example, [abc] denotes a, b, or c.

Order

To set the order of the selected field, type the order.

For example, 6. Order of a finite field is the number of elements it contains.

Visibility

Configuring Form Fields

To make the field visible, switch **Visibility** to **ON**.

5. Click **Save & Exit**.

The selected field is configured.

Associating Forms

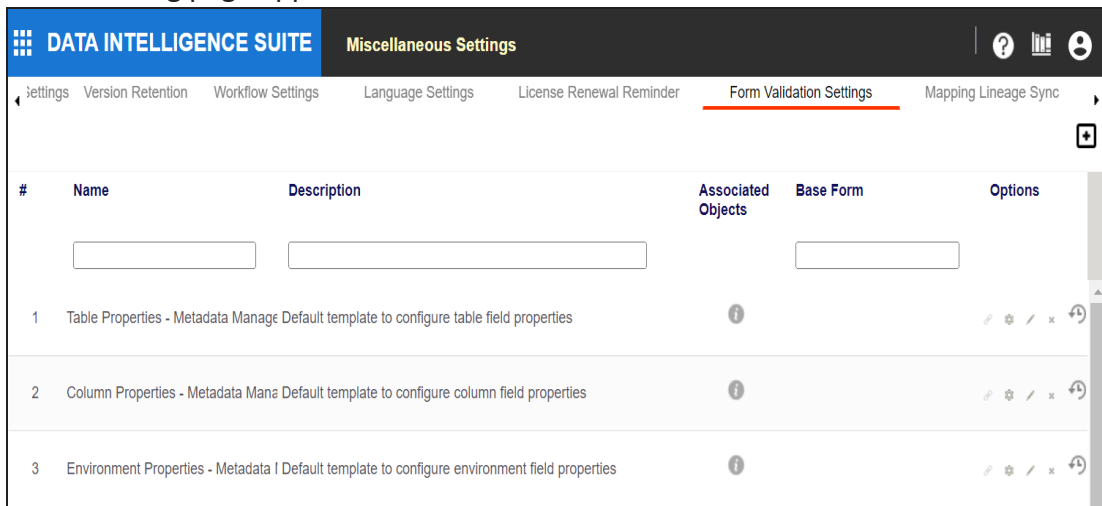
Association of a form depends on the type of the form. You can associate forms in the following manner:

Form Type	Association
Table Properties	You can associate it to multiple environments or Systems. If the form is associated with a system then it is applicable to all the environments under the system.
Column Properties	You can associate it to multiple environments or systems. If the form is associated with a system then it is applicable to all the environments under the system.
Environment Properties	You can associate it to multiple systems.

To associate forms, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Form Validation Settings**.

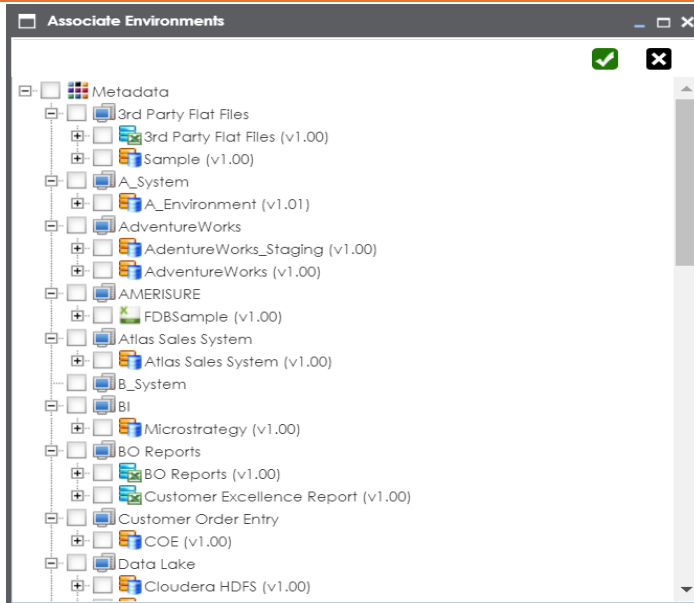
The following page appears.



2. In the **Options** column, click .

The Associate Environments page appears.

Associating Forms



3. Select the systems or environments, and click .

The form is associated.

Managing Forms

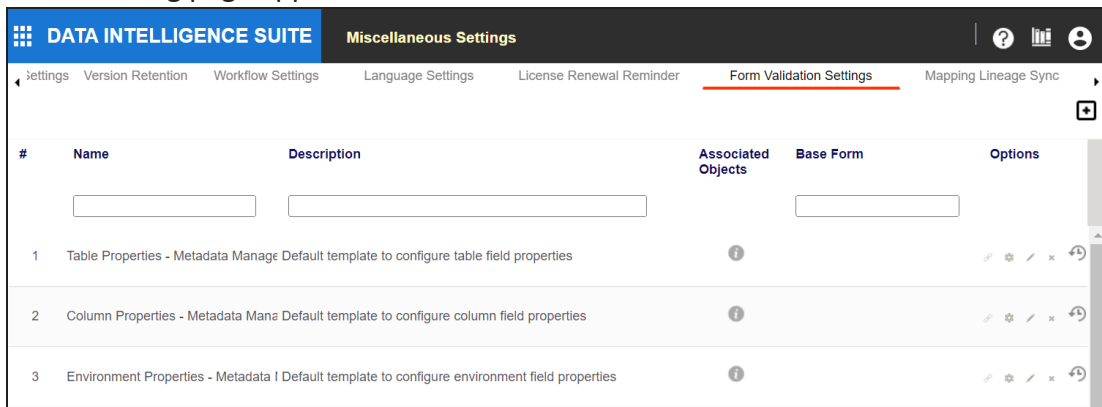
Managing forms involves:

- Editing Forms
- Deleting Forms
- Viewing Activity Logs

To manage forms, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Form Validation Settings**.

The following page appears.

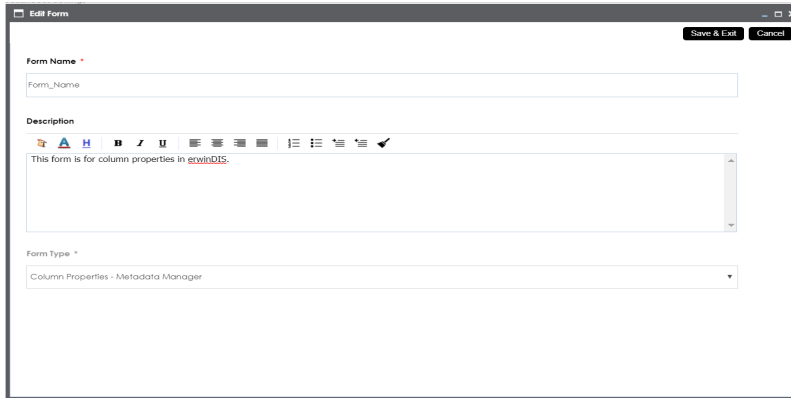


2. Use the following options to manage forms:

Edit ()

To edit forms, click .

Managing Forms



Delete (✕)

To delete forms, click ✕.

History (🕒)

To view the activity log of the forms, click 🕒.

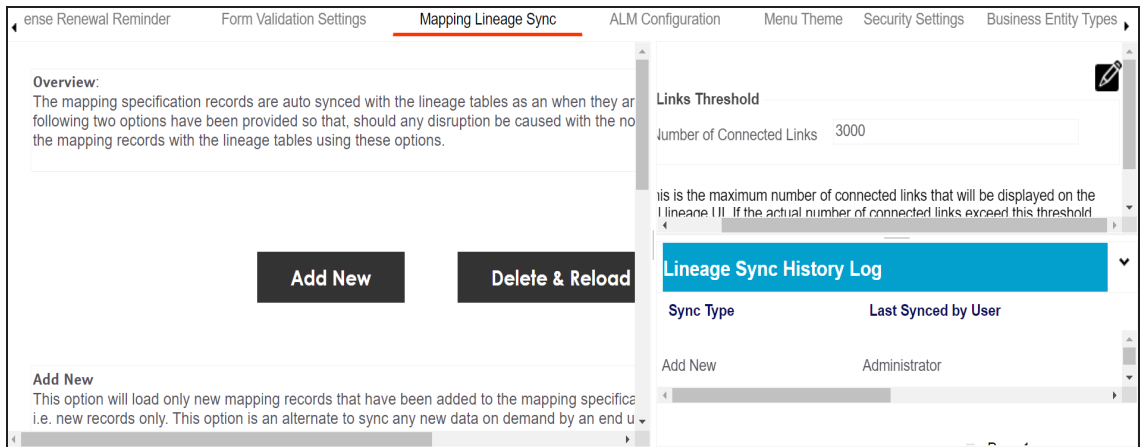
Mapping Lineage Sync

The mapping specification records are auto synced with the lineage tables as an when they are created or imported by you. You can resync mapping records with the lineage tables in case of any disruption.

To resync mapping records with the lineage tables, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Mapping Lineage Sync.**

The following page appears.



2. Use the following options:

Add New

Use this option to load only new mapping records that have been added to the mapping specification table since the last sync.

Delete & Reload

Use this option to reload all the mapping specification information from scratch into the lineage table(s).

Statistics

This pane displays the detailed mapping records synced with the lineage tables.


Sync History Log

Displays the activity log of the user.

Links Threshold

Lineage appears in two views, graphical and grid. Under the Links Threshold section, you can set threshold value of connected links such that if number of connected links exceed this value, then lineage is not rendered in the graphical view. You can also control whether Overview Lineage is enabled for lineage reports.

To configure links threshold and overview lineage, follow these steps:

1. Under the Links Threshold section, click .
2. Use the following options:

Number of Connected Links

Use this option to set the threshold value for connected links such that if number of connected links exceed this value, then lineage is not rendered in the graphical view. By default, this value is set at 3000.

Overview Lineage

Use this option to enable overview lineage for lineage reports.

3. Click .

The links threshold and overview lineage are configured.

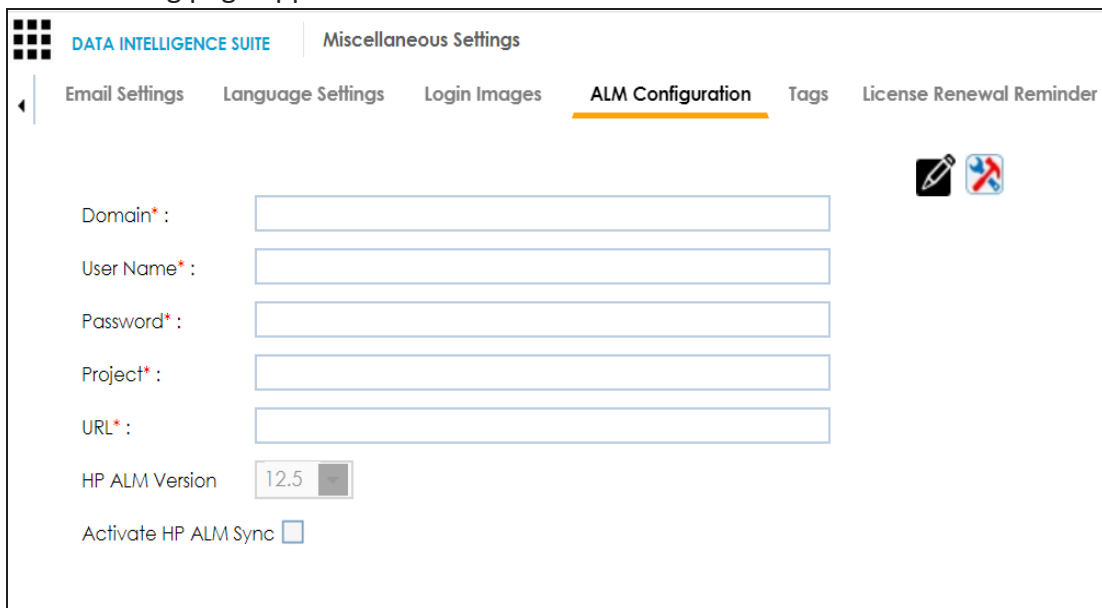
Configuring HP ALM

HP Application Life Cycle Management (ALM) is a third party tool to manage test cases. You can configure connection details and integrate the test cases created in HP ALM with the Test Manager.


To configure HP ALM, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > ALM Configuration**.

The following page appears.



The screenshot shows the 'ALM Configuration' page within the 'Miscellaneous Settings' section of the 'DATA INTELLIGENCE SUITE'. The page contains several input fields: 'Domain*', 'User Name*', 'Password*', 'Project*', and 'URL*', all marked with a red asterisk to indicate they are mandatory. Below these is a dropdown menu for 'HP ALM Version' set to '12.5' and a checkbox for 'Activate HP ALM Sync'. A pencil icon is located in the top right corner of the form area.

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

Field Name	Description
Domain	Specifies the name of a domain created in the HP ALM. For example, Banking.
User Name	Specifies the user name to log on to ALM. For example, James99.

Configuring HP ALM

Field Name	Description
Password	Specifies the password to log on to ALM. For example, James@11.
Project	Species the name of a project created under the domain. For example, JAMES99_BANK.
URL	Specifies the URL of the ALM. For example, http://localhost:8181/qcbin/SiteAdmin.jsp
HP ALM Version	Specifies the HP ALM version which is being integrated with erwin DI. For example, 12.2.
Activate HP ALM Sync	Specifies whether a sync between HP ALM and erwin DI is activated. Select the check box to sync HP ALM with erwin DI.

4. Click  to test the connection.

If the connection is established then a success message is displayed.

5. Click .

The HP ALM is integrated with the Test Manager.

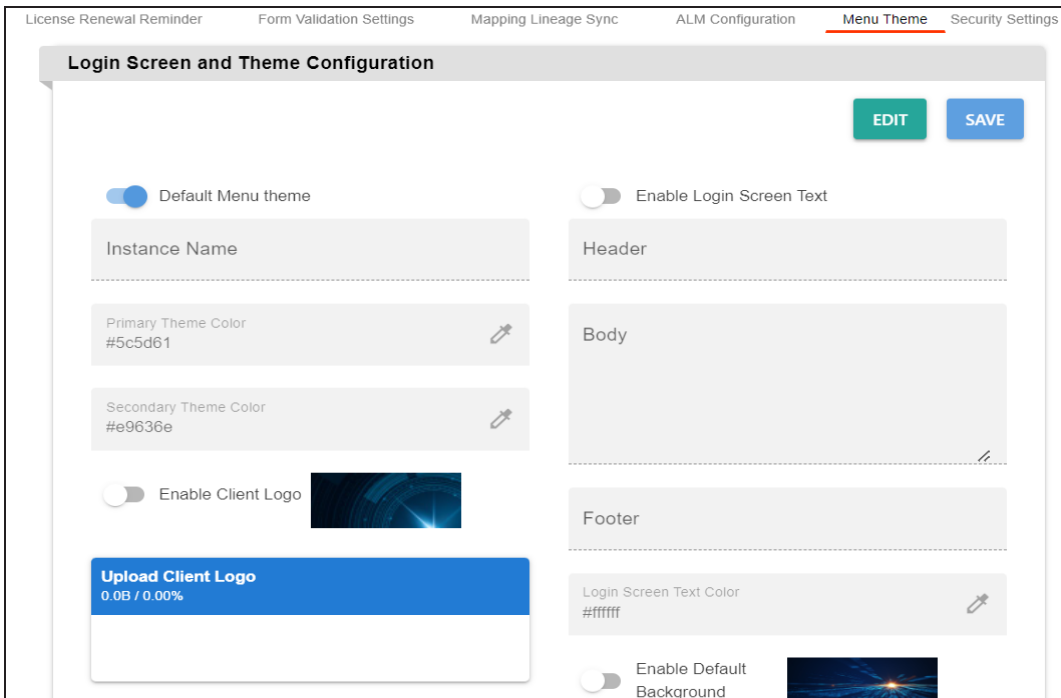
Configuring Menu Theme

By default, a menu theme is available for erwin Data Intelligence (erwin DI). You can also configure menu theme and select different colors and logo to personalize the application menu, navigation pane, and log in page.

To configure menu theme, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Menu Theme**.

The following page appears.



2. Click **Edit**.
3. Use the following options:

Default Menu Theme

Use this option to switch between default theme and custom menu themes. You can select theme colors for a custom menu theme whereas the default menu theme has the following colors:

Configuring Menu Theme

- **Primary Theme Color:** #27a168
- **Secondary Theme Color:** #a34515


Instance Name


Use this option to customize a name for your application instance. The instance name appears on the navigation pane.

For example, the following theme displays the name of the instance as erwin DI v12.0.

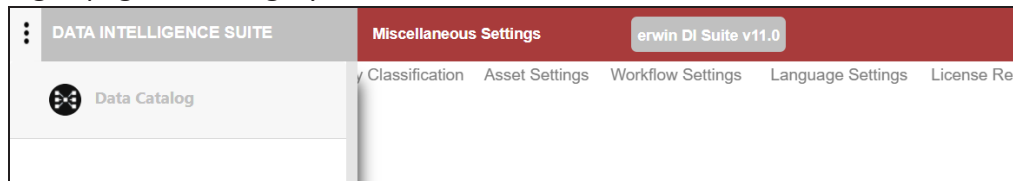
|

Primary Theme Color

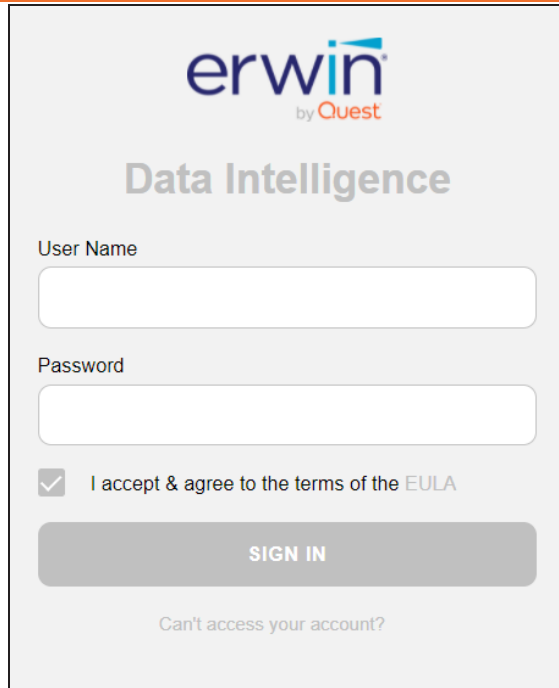
You can use this option only when Default Menu Theme is switched to . Use this option to configure the theme color of the application menu, instance name, and log in page.

To configure **Primary Theme Color**, click  and select a color from the color palette.

For example, the following theme for the application menu, instance name, and log in page is set to grey color.



Configuring Menu Theme



erwin
by Quest

Data Intelligence

User Name


Password


I accept & agree to the terms of the EULA

SIGN IN

Can't access your account?

Secondary Theme Color

You can use this option only when Default Menu Theme is switched to . Use this option to configure the theme color of the navigation pane.

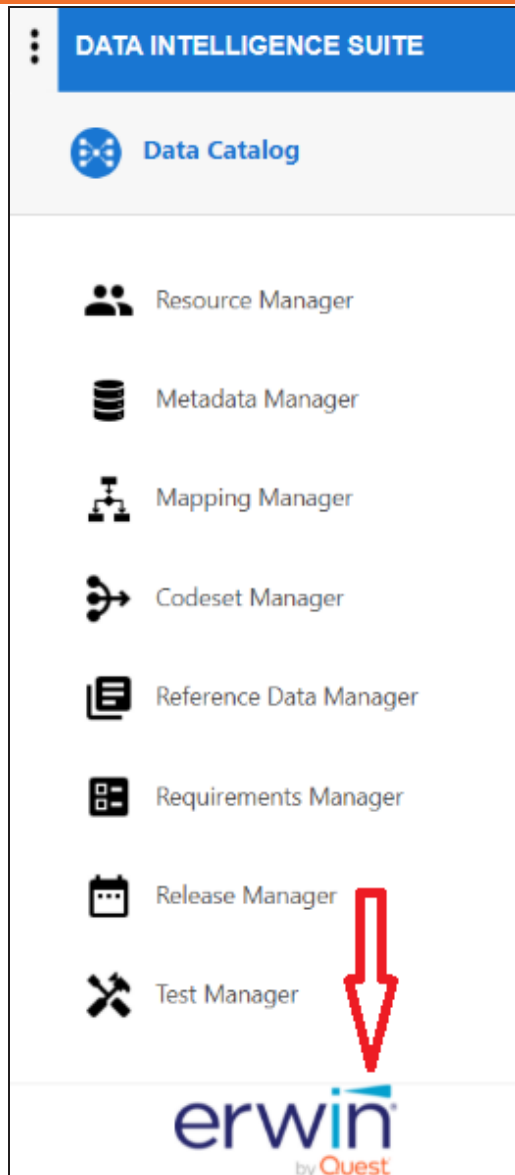
To configure **Secondary Theme Color**, click  and select a color from the color palette.

For example, the above theme for the navigation pane is set to red color.

Enable Client Logo

Use this option to display the uploaded logo at the bottom of the application menu and on the log in page of the application.

For example, the following application menu displays a logo.



Upload Client Logo

Use this option to upload a logo to display it on the application menu and log in page of the application.

To upload a logo, click , browse, and select a logo file.

4. Click **Save**.

Configuring Menu Theme

The menu theme is configured.

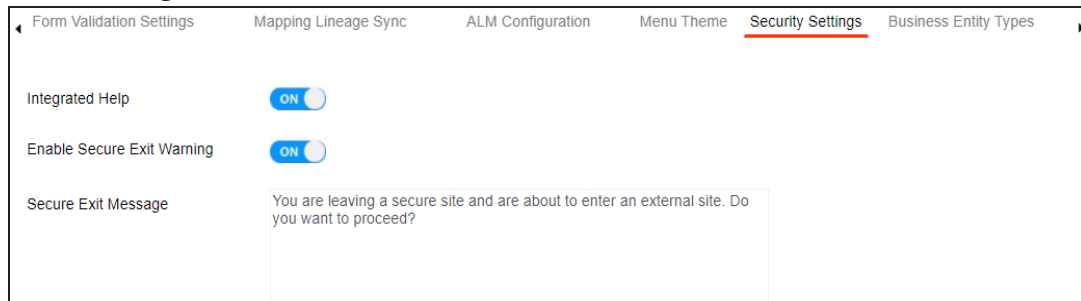
Configuring Security Setting

By default security settings are available for erwin Data Intelligence (erwin DI) that include a secure exit warning and an Integrated help that you can access within the application without navigating away from it. The integrated help offers assistance via in-app guided feature walkthroughs. Apart from that, when new features are introduced, it informs you via beacons. You can configure the integrated help's availability and warning message under Miscellaneous Settings.

To configure security setting, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous > Security Settings**.

The configuration page appears. By default, Integrated Help is disabled and Secure Exit Warning is enabled.



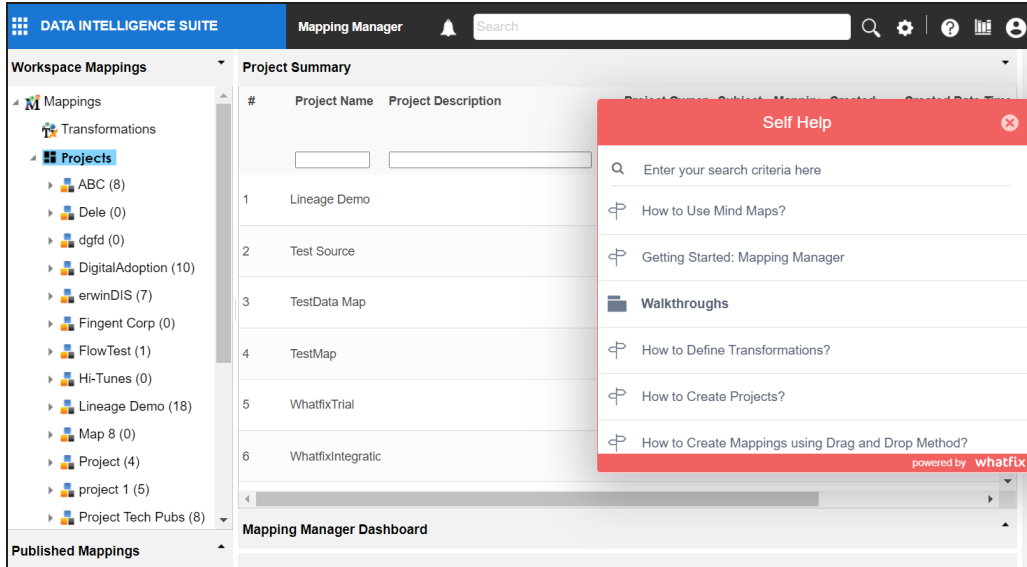
2. Use the following options:

Integrated Help

Configuring Integrated Help

Switch **Integrated Help** to **ON** or **OFF** based on your requirement.

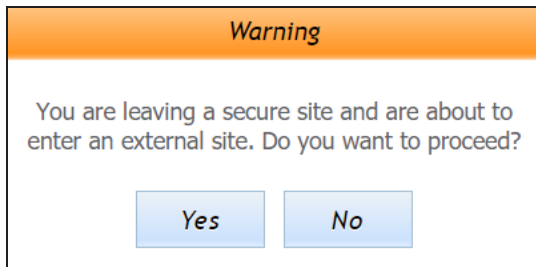
If switched on, Integrated Help appears in the application.



Enable Secure Exit Warning

Switch **Enable Secure Exit Warning** to **ON** or **OFF** based on your requirement.

If switched on, warning message appears in the application if you leave a secure site and are about to enter an external site.



Secure Exit Message

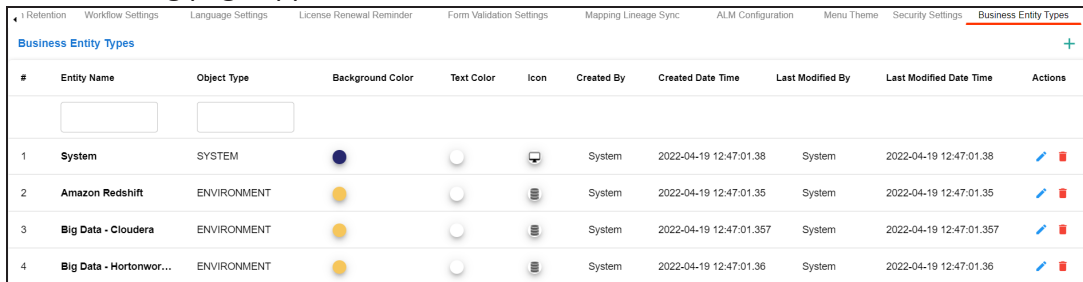
You can modify warning message that appears while navigating to an external site.

Configuring Business Entity Types

You can configure background color, text color, and icon of any environment and table.

1. Go to **Application Menu > Settings > Miscellaneous > Business Entity Types**.

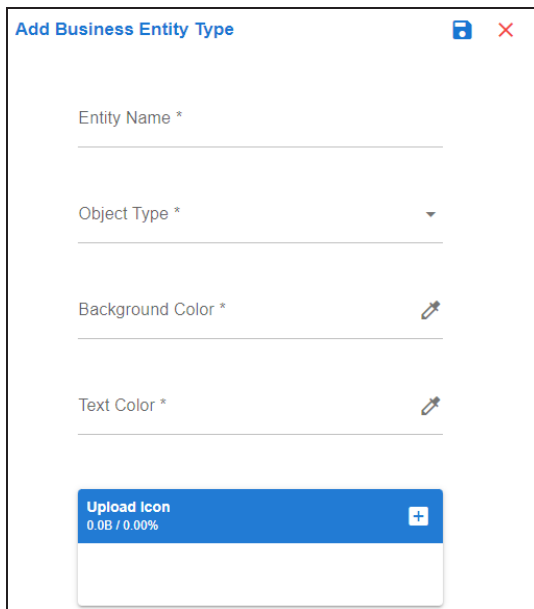
The following page appears.



#	Entity Name	Object Type	Background Color	Text Color	Icon	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Actions
1	System	SYSTEM				System	2022-04-19 12:47:01.38	System	2022-04-19 12:47:01.38	
2	Amazon Redshift	ENVIRONMENT				System	2022-04-19 12:47:01.35	System	2022-04-19 12:47:01.35	
3	Big Data - Cloudera	ENVIRONMENT				System	2022-04-19 12:47:01.357	System	2022-04-19 12:47:01.357	
4	Big Data - Hortonwor...	ENVIRONMENT				System	2022-04-19 12:47:01.36	System	2022-04-19 12:47:01.36	

2. Click .

The Add Business Entity Type page appears.



Add Business Entity Type

Entity Name *

Object Type *

Background Color *



Text Color *

Upload Icon 0.0B / 0.00%

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

Configuring Integrated Help

Field Name	Description
Entity Name	Specifies the unique name of an entity. For example, Adventureworks Metadata.
Object Type	Specifies the description about the form. For example: The form is to validate metadata in the Adventureworks environment.
Background Color	Specifies the type of the form. For example, Table Properties - Metadata Manager.
Text Color	Specifies the type of the form. For example, Table Properties - Metadata Manager.

4. Click  .
The file is used as an icon.
5. Click  .
The business entity type is saved.

Configuring License

A license to erwin DI is for limited duration and you can access different modules depending on your license. You can also update your license before it expires.

To update your license, follow these steps:

1. Go to **Application Menu > Settings > License**.

The License tab appears.

Title	Value	Apply New License
Company Name:	Dev License	
Allowed Projects:	30	Paste License ↓
Allowed Subjects Per Project:	30	
Codeset Manager:	Enabled	
Release Manager:	Enabled	
Reference Data Manager:	Enabled	
Code Automation Templates:	Enabled	
Test Manager:	Enabled	
Requirements Manager:	Enabled	
Reporting Manager:	Enabled	Activate License

2. Verify your license information. On this page, you can view license validity, enabled modules, user, and login details applicable for this license in a tabular format. For more information, refer to the following table.

Title	Description
Company Name	Specifies the name of your company/organization.
Allowed Projects	Specifies the allowed number of projects that you can create in Mapping Manager. For example, when the value is set as 30, you can create 30 projects in Mapping Manager.
Allowed Subjects	Specifies the allowed number of subject areas that you can create per project.

Configuring License

Title	Description
Areas Per Project	For example, when the value is set as 2, you can create 2 subject areas in a project.
Modules	Specifies the list of modules that are enabled for this license. Your license can include modules, such as Metadata Manager, or Mapping Manager, or Code Automation Template, or other relevant modules based on your license. The value Enabled indicates the module is included with your license.
Allowed Users	Specifies the allowed number of users that you can create in Resource Manager. For example, when the value is set as 10, you can create upto 10 user roles. This includes all user role types.
Concurrent Logins Allowed	Specifies the number of allowed logins for a user at the same time. For example, when the value is set as 10, the same user can log in at 10 different instances at the same time.
User Multi Login Allowed	Specifies whether multiple logins are allowed for users or not.
License Created Date	Specifies the license creation date and time.
Validity	Specifies the license validity in days.
License Expiry Date	Specifies the license expiry date and time.

3. Paste the license URL in the space provided and click **Activate License**.

The license is updated.