

erwin Data Intelligence

Report Management Guide

Release v12.0

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Managing Reports

Managing Reports

You can view, create, manage reports, and dashboard configurations from the Reporting Manager. You can also evaluate the team's productivity and create statistical reports. It involves creating and publishing reports and dashboards. From the Reporting Manager, you can generate custom reports of your data integration project using SQL queries.

Using Reporting Manager

To access the Reporting Manager, go to **Application Menu** > **Miscellaneous** > **Reporting Manager**.

The Reporting Manager dashboard appears:

| DATA NIFELUGENCE SUITE Reporting Manager | | | | | | | | | |
|---|---|-------------------|--------------------|-------------|---------------|----------------------------|---------------------|----------------------------|-------|
| Reporting Workspace 1 | • | Categories Settin | gs | | | | | | 2 |
| Categories Categ | • | Category Name | Category Hierarchy | Description | Created By | Created Date Time | Last Modified By | Last Modified Date Time | marco |
| 🕨 嚞 Tech Pubs Cat 2 | | | | | | | | | |
| | 1 | Tech Pubs Cat 1 | | | Administrator | 2020-09-02 03:28:32.713 | Administrator | 2020-09-02 03:28:32.713 | Ð |
| | 2 | Tech Pubs Cat 2 | | | Administrator | 2020-09-02 03:28:50.25 | Administrator | 2020-09-02 03:28:50.25 | Ð |
| | 1 | | | | | 03:28:32.713 2020-09-02 | | 03:28:32.713 2020-09-02 | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| 1 | | | | | | | | | |

| UI Section | Function |
|-------------------|--|
| 1-Reporting | Use this pane to browse through categories, reports, and dashboards. It |
| Workspace | enables you to create and categorize reports and dashboards. |
| 2 Dight Dana | Based on the selection in the Reporting Workspace, use this pane to view and |
| 2-Right Pane | edit reports, dashboard details and category details. |

From the Reporting Manager you can:

- Create custom reports
- Create dashboard

Creating Categories

You can create custom reports and group them under different categories. Also, you can <u>create multiple reports</u> under a category.

To create categories, follow these steps:

- 1. Go to Application Menu > Miscellaneous > Reporting Manager.
- 2. In the **Reporting Workspace** pane, right-click the **Categories** node.

| DATA INTELLIGENCE SUITE Reporting A | Nanager | | |
|-------------------------------------|---------|-------|----------|
| Reporting Workspace < | Categ | ories | Settings |
| Categories New Category | | | |

3. Click New Category.

The New Category page appears.

| New Category | | | _ _ × |
|----------------|-------------------------------------|-------------|--------------|
| | | | ₽ × |
| Category Name* | | | |
| Description | ≧ <u>H</u> <u>B</u> <i>I</i> | ⊻ ≣ ≣ ≡ ∎ 5 | ≣ 1≣ 1≣ 1≝ ✔ |
| | | | |
| | | | |
| | | | * |

4. Enter Category Name and Description.

Creating Categories

For example:

- Category Name: Workflow_Status
- **Description:** The category contains workflow related reports.
- 5. Click 💾.

The category is created and saved in the Categories tree.

You can create custom reports and classify them under different categories. The reports are generated based on the SQL queries and can be exported to an excel sheet. You can generate reports key metrics from your data integration project and view these reports in a chart and in a grid view.

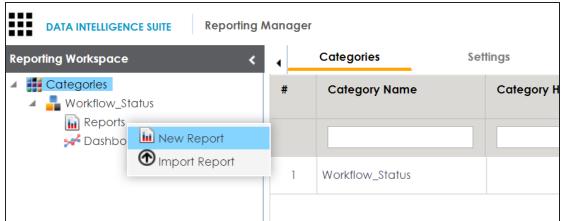
You can also import reports, and export reports in a .arp format.



To create a new report, you must <u>create a new category</u>. You can create reports under a new or an existing category.

To create a report, follow these steps:

- 1. In the Reporting Workspace pane, expand a category node.
- 2. Right-click the **Reports** node.



3. Click New Report.

The following page appears.

| DATA INTELLIGENCE SUITE Repo | orting Manager | |
|------------------------------|--|---|
| Reporting Workspace | Save & Continue Overview Report Name* Description | Save & Exit Cancel Design Extended Properties |
| | Enable | OFF |
| | Activate Report | QFF |
| | Activate Chart | OFF |

4. Enter a **Report Name** and **Description**.

For example:

- Report Name: Workflow_Assignment
- **Description**: This report is about the workflow assignment to users.
- 5. Use the following options to enable and activate the report:

Enable

Switch this option **ON** to enable the report.

Activate Report

Switch this option **ON** to enable this report.

You can add only active reports to dashboards.

Activate Chart

Switch this option **ON** to enable the report.

6. Click Save and Continue.

The report is created and saved in the Reports tree.

By default, the **Design** tab appears.

| DATA INTELLIGENCE SUITE Reporting M | anager | 0 8 |
|--|---|----------------|
| eporting Workspace < Categories Workflow_Status Mortflow_Stages Mortflow_Stages Mortflow_Stages | Save Cancel Overview Design Extended Properties Query Editor Switch to Grid Mode Switch to Chart Mode 1 Type your query here | Validate Query |

7. Enter a SQL query based on your requirements and use Ctrl + Space to get the list of tables.

| DATA INTELLIGENCE SUITE Reporting / | Manager | 08 |
|--|--|----------------|
| Reporting Workspace Image: Categories Image: Categories Image: Workflow_Status Image: Reports Image: Workflow_Stages Image: Reports | Save Cancel Overview Design Extended Properties Query Editor Switch to Grid Mode Switch to Chart Mode | Validate Query |
| s4 ⁴ Dashboards | ADS_WORKFLOW_ASSIGNMENT ADS_WORKFLOW_ASSIGNMENT ADS_WORKFLOW_ASSIGNMENT ADS_WORKFLOW_FOLDER ADS_WORKFLOW_NODE_ROLE ADS_WORKFLOW_STAGE ADS_WORKFLOW_STAGE ADS_WORKFLOW_STAGE ADS_WORKFLOW_STAGE ADS_WORKFLOW_STATUS | |

8. Click Validate Query.

The query is validated.

9. Click Save.

After you create a report, use the following options on the Design tab:

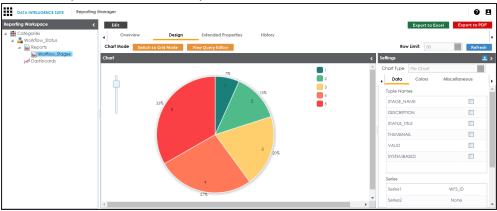
Switch to Grid Mode

Click this option to view the report in a grid.

| DATA INTELLIGENCE SUITE Reporting | Manager | | | | | 08 |
|---|-------------|-----------------|----------------------------|-----------------|------------------------|---------------|
| Profing Workspace Categories Categories Workflow_Status Categories Categorie | f Grid / | Overview Design | Extended Properties Histor | У | Exp | Row Limit: 50 |
| Worflow_Stages | | WFS_ID | STAGE_NAME | DESCRIPTION | STATUS_TITLE | MODULE_ID |
| | 1 | 1 | Review | Review | Pending Review | 14 |
| | 2 | 2 | Approve | Approve | Pending Approve | 14 |
| | 3 | 3 | Pending Publish | Pending Publish | Pending Publish | 14 |
| | 4 | 4 | First Approval | | Pending Final Approval | 14 |
| | 5 | 5 | Add_Stage | | Status_Title | 14 |

Switch to Chart Mode

Click this option to view the reports as a chart.



Export to Excel

Click this option to to download the report in .xlsx format.

Export to PDF

Click this option to to download the report in .pdf format.

Edit

Click this option to update the report, and choose a chart type from Settings tab.

You can also import and export reports from a category. For more information, on exporting and importing reports, refer to the Exporting and Importing Reports topic.

You can also manage the custom reports. Managing reports involves:

- Editing reports
- Copying reports

- Exporting reports
- Deleting reports

Managing Custom Reports

Managing custom reports involves:

- Editing reports
- Copying reports
- Exporting reports
- Deleting reports

To manage reports, follow these steps:

- 1. In the **Reporting Workspace** pane, expand a category.
- 2. Expand the **Reports** node, select and right-click a report.

| DATA INTELLIGENCE SUITE Reporting | Manager | | | |
|-----------------------------------|---------------------|------------------------|---------------------|---------|
| Reporting Workspace < | Edit | | | |
| Categories | Overview | Design | Extended Properties | History |
| 🔺 🔒 Tech Pubs Cat 1 | ↓ • ⊢ | - | | - |
| Reports | Report Name | Tech Pubs Report 1 | | |
| Tech Pubs Report 1 | | | | |
| Tech Pubs Report 2 | by Report | A small description of | f this report | |
| 🚽 Dashboards 🛛 🛃 Exp | ort Report | A small description of | uns report. | |
| 🕨 🚽 Tech Pubs Cat 2 👘 Del | ete Report(s) | | | |
| | | | | |

3. Use the following options:

Copy Report

Use this option to copy a report and past it in another category.

Export Report

Use this option export the report into XLSX file.

Delete Report(s)

Use this option to delete a report under a category.

Edit Report

Use this option to update report details. To edit a report, select a report from a category and click **Edit**.

Exporting and Importing Reports

From the Reporting Manager you can:

- Export reports
- Import reports

You can also import reports from a different category.

Export Reports

To export reports, follow these steps:

1. In the **Reporting Workspace** pane, expand the **Reports** node, and right-click a report.

| DATA INTELLIGENCE SUITE | eporting Manager | | | |
|--|--|--------------------------|---------------------|---------|
| Reporting Workspace | < Edit | | | |
| Categories New_Category Newflow_Status | ▲ Overview Report Name | Design Worflow_Stages | Extended Properties | History |
| | Copy Report Export Report Delete Report(s) | Workflow_Stages o | f various objects. | |

2. Click Export Report.

The report is downloaded in .ARP format.

You can extract the report in .XML format from the .ARP file.

Import Reports

To import reports, follow these steps:

1. In the **Reporting Workspace** pane, expand a category node, and right-click the **Reports** node.

Exporting and Importing Reports

| | Manager | r | |
|---|---------|-----------------|------------------|
| Reporting Workspace < | ↓ | Categories | Settings |
| Categories New_Category Reports | # | Category Name | Category Hierard |
| And Dashbo | | | |
| Workflow_S Import Report | 1 | New_Category | |
| | 2 | Workflow Status | |

2. Click Import Report.

The Import Report page appears.

| Import Report | _ 🗆 × |
|---|---------|
| Drag-n-Drop files here or click to select files for upload. | |
| (†) 🗙 | |

- 3. Drag and drop the report (.ARP format) or use ≐ to browse the report.
- 4. Click **1**.

The report is imported to the category.

Creating Dashboard

A dashboard is a collection of charts and reports. Dashboards are grouped under categories.

To create a dashboard, follow these steps:

1. In the **Reporting Workspace** pane, expand a category, and right-click the **Dashboards** node.

| | Reporting | Manage | şr | |
|---|--------------|--------|-----------------|---------------|
| Reporting Workspace | < | | Categories | Settings |
| Categories Workflow_Status Reports Ashboards | | # | Category Name | Category Hier |
| | New DashBoar | | Workflow_Status | |
| | | | | |

2. Click New Dashboard.

The New Dashboard page appears.

| New Dashboard | | | | | | | - | - x |
|-------------------|-------------|---|---|----|-----|---|---------|------------|
| | | | | | | Ľ | × | |
| | | | | | | _ | - | |
| Dashboard Name* : | | | | | | | | |
| | | | | | | | | |
| Description: | Tr <u>A</u> | H | в | ΙŪ | = = | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | - | |
| | | | | | | | | |

3. Enter Dashboard Name and Description.

For example:

- **Dashboard Name**: Work-flows
- **Description**: The dashboard is a collection of reports related to work flows.
- 4. Click

A new dashboard is created and saved in the dashboard tree.

Once a dashboard is created, you can <u>add components to the dashboard</u> and <u>manage dashboards</u>.

Adding Dashboard Components

You can add reports to the category's dashboard and it helps you accessing all the reports in one place.

To add components to a dashboard, follow these steps:

- 1. In the **Reporting Workspace** pane, expand a category.
- 2. Expand the **Dashboards** node and click a dashboard name to add a component to it.

The following page appears.

| DATA INTELLIGENCE SUITE Reporting A | Manager | | |
|---|-----------|---------|-------------------------|
| Reporting Workspace < | Dashboard | Summary | |
| Categories Workflow_Status | C Actions | | |
| Reports A A Dashboards | | | |
| Arrow Dashboard_Name | | | |
| | | | |
| | | | |
| | | | No components available |

3. Click Actions.

| DATA INTELLIGENCE SUITE Reporting | Manager | |
|--|---|---------|
| Reporting Workspace 🗸 | ↓ Dashboard | Summary |
| Categories Workflow_Status Reports Mashboards | Actions Add Components Components Export | Þ |

4. Click Add Components.

The Add Components page appears.

Adding Dashboard Components

| Add Components | | _ 🗆 × |
|----------------|------|--------|
| | Save | Cancel |
| Component Name | | |
| | | |
| | | |
| | | |
| | | |

The Category List page appears.

| Category List | _ — × |
|---|---------------|
| Categories Workflow_Status | Select Cancel |

6. Select a category and click **Select**.

The reports in the category are added to the dashboard.

Managing Dashboards

Managing dashboard involves:

- Editing dashboard
- Copying dashboard
- Exporting dashboard
- Deleting dashboard(s)

To manage dashboards, follow these steps:

1. In the **Reporting Workspace** pane, right-click a dashboard.

| | orting N | \anager | | | | | |
|--|----------|------------------------|-------------------|-----------------|--------------------|-----------------------|----------|
| Reporting Workspace | < | Dashbo | oard Details | | | | |
| Categories Tech Pubs Cat 1 | | # | Dashboard Name | Category Name | Category Hierarchy | Dashboard Description | Created |
| Reports Report 1 Tech Pubs Report 1 Tech Pubs Report 0 | | | | | | | |
| Tech Pubs Report 2 | | 1 | Tech_Pub_Dashba | Tech Pubs Cat 2 | Tech Pubs Cat 2 | | Administ |
| Tech Pubs Cat 2 Reports Sashboards | | | | | | | |
| 17 1 2 2 2 1 2 | | py Dash | | | | | |
| | | it DashBo port Dash | | | | | |
| l l | De | lete Das | hBoard(s) | | | | |

2. Use the following options:

Copy Dashboard

Use this option to copy a dashboard and past it in another category.

Edit Dashboard

Use this option to update an existing dashboard.

Export Dashboard

Use this option export the dashboard into XLSX file.

Delete Report(s)

Use this option to delete a dashboard under a category.

Configuring Extended Properties

You can configure user-defined properties of a report by designing a form, and you can access that form under the **Extended Properties** tab. First, you need to set up a form and then use it to configure its properties.

To configure extended properties of reports, follow these steps:

- 1. In the **Reporting Workspace** pane, click a report.
- 2. In the right pane, click the Extended Properties tab.

| Reporting Workspace 🗸 | Edit | | | |
|--|-------------|--------|---------------------|---------------|
| Categories Lategory | Overview | Design | Extended Properties | History |
| Reports | | | | |
| Pashboards | Form Values | | | |
| Workflow_Status | | | | No Data Found |
| | | | | |
| | | | | |

- 3. Click Edit.
- 4. Click Configure.

Extended properties Configuration page appears.

| Extended Properties Configuration | | | | | |
|-----------------------------------|---|-----------|--------------------------------|-----------|---|
| Edit Delete | | | | | |
| Field Controls | | | | | |
| Group Text Box Combo Box | List Radio Check Box N | 1 Jumb | er Boolean Date Pi | | - |
| Configure Form | | | Properties | | |
| Radio | | ^ | Property | Value | |
| | | | Published | | Â |
| Text Box | | | Field | Radio | |
| Combo Box | Select an option | | Field | Radio | |
| | | | Туре | Radio | |
| Module | Links | | Configure Values | Configure | |
| Resource Manager | https://erwin.com/bookshelf/10.2DISBookshelf/Cont | | Configure values | Comgute | |
| Resource manager | mpasserwin.combookanaiis to.2513566kanaiis.com | | Description | | |
| Metadata Manager | https://erwin.com/bookshelf/10.2DISBookshelf/Cont | • | Visible in Extended Properties | | |

The Extended Properties Configuration page contains the following sections:

- **Field Controls**: Displays the available UI elements.
- **Configure Form**: This pane enables you to design forms using the UI elements in the **Field Controls** pane.

Configuring Extended Properties

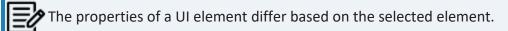
Properties: Displays the properties of the selected UI element in the **Configure Form** pane.

5. Click Edit.

•

- 6. Double-click the UI elements from the **Field Controls** pane or drag and drop it into the **Configure Form** pane.
- 7. Select a UI element in the **Configure Form** pane, one at a time, to configure their properties in the **Properties** pane.

| Extended Properties Configuration | | | | _ □ X |
|-----------------------------------|-----------------------|-------------|---|----------------------|
| Save Cancel Delete | | | | |
| Field Controls | | | | |
| Group Text Box Combo Box | List Concert Box | T Number | Boolean Date Picker | Category Rich Editor |
| Configure Form | | | Properties | |
| | <u>а н</u> в <u>г</u> | | Property | Value |
| Rich Editor | | * | Published | |
| | | | Field | Rich Editor |
| | | - | Туре | Rich Editor |
| | | | Dependencies | Type or click here |
| | | | Configure Values | Configure |
| | | | Mandatory | OFF |
| | | | Regular Expression | |
| | | | Description | |
| | | | Visible in Extended Properties | ON |
| | | | Order | 1 |
| | | | Note [*] : 1. Double click on the field ce 2. Select the field name to up | |



Refer to the following table for property descriptions:

| Property | Description |
|----------------|---|
| Published | Switch Published to ON to publish the field. |
| Field | Double-click the corresponding Value cell to edit the field label. |
| Tupo | Double-click the corresponding Value cell to determine the field |
| Туре | type. |
| Mandatory | Switch the Mandatory option to ON to make this field mandatory in |
| ivialitiator y | a form. |

Configuring Extended Properties

| Property | Description | | | |
|-------------------|--|--|--|--|
| Description | Double-click the corresponding Value cell to enter a field descrip- | | | |
| | tion. | | | |
| Visible in Exten- | Switch Visible in Extended Properties to ON to make it visible. | | | |
| ded Properties | | | | |
| Order | Displays the order of the field in a form. You can drag and drop the | | | |
| | field in the Configure Form pane to change its order. | | | |

8. Click Save.

The form is saved under the Extended Properties tab.

To use the form, follow these steps:

- 1. In the **Reporting Workspace** pane, click a report and click the **Extended Properties** tab.
- 2. Click **Edit** and use the form.

You can download the extended properties in the XLSX format and use it as a template to <u>import extended properties</u>. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.

3. Click Save.

The form is updated.

Importing from Excel

You can import user-defined properties for reports from an XLSX file. You can either use an existing XLSX file or download an extended properties file from the Extended Properties tab. Ensure that the XLSX file follows the correct template.

To import extended properties from XLSX files, follow these steps:

1. On the Extended Properties tab, click Import From Excel.

The Upload Excel page appears.

| Upload Excel | <u> </u> |
|--|----------|
| Attach Excel File Choose File No file chosen | |
| 1 × | |

- 2. Click Choose File.
- 3. Browse and select the XLSX file.
- 4. Click **1**.

The Upload Excel page appears. It displays the data in the XLSX file.

| Upload Excel | | | | | | - |
|--------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| 1 | | | | | | |
| # | FIELD | VALUE | [≜] TYPE | PARENTFIELD | CREATED_BY | CREATED_DATE_TIME |
| # | Select Column To Import |
| 1 | Data Stewards | | Combo Box | | | |
| 2 | Data Steward_UK | Data Steward_UK | Text Box | /Data Stewards | Administrator | 10/20/2020 06:42:38 |
| 3 | Data Steward_GER | Data Steward_GER | Text Box | /Data Stewards | | |
| 4 | Data Owners | Data Owner_GER | Text Box | | Administrator | 10/20/2020 06:42:38 |

5. Double-click the Select Column To Import cell in the required column.

The available options appear.

Importing from Excel

| Upload Excel | | | | |
|--------------|---------------------------------|-------------------------|-------------------------|-------------------------|
| ÛX | | | | |
| # | FIELD | VALUE | [≜] TYPE | PARENTFIELD |
| # | Select Column To Import | Select Column To Import | Select Column To Import | Select Column To Import |
| 1 | TYPE PARENTFIELD | | Combo Box | |
| 2 | Clear Selection Data Steward_UK | Data Steward_UK | Text Box | /Data Stewards |
| 3 | Data Steward_GER | Data Steward_GER | Text Box | /Data Stewards |

6. Select an appropriate option.

For example, if you select Field, then the selected column is imported as Field.

Similarly, you can also select the Value, Type, and Parentfield columns. Ensure that you at least select a Field column.

7. Click 🛍.

The extended properties are imported.

| Import From Excel | Export To Excel |
|-----------------------|---|
| | telp |
| | Self Help |
| | |
| Select an option | ~ |
| | |
| Data Owner_GER | |
| | |
| Tech Data Steward_GER | |
| | |
| Mapping Designer | |
| | Select an option Data Owner_GER Tech Data Steward_GER |