



**erwin Data Intelligence**

**Platform Dashboard Guide**

**Release v13.2**

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## Managing Platform Dashboard

The Platform Dashboard module provides a centralized overview of key metrics, such as metadata metrics, mapping metrics, marketplace metrics, and insights on data governance, data lineage, user activity, and data quality.

The dashboard aims to assist executives and administrators in understanding erwin DI's performance, usage, and value creation of erwin DI within the organization. For further information on accessing and using the Platform Dashboard, refer to the [Using Platform Dashboard](#) topic.

## Using Platform Dashboard

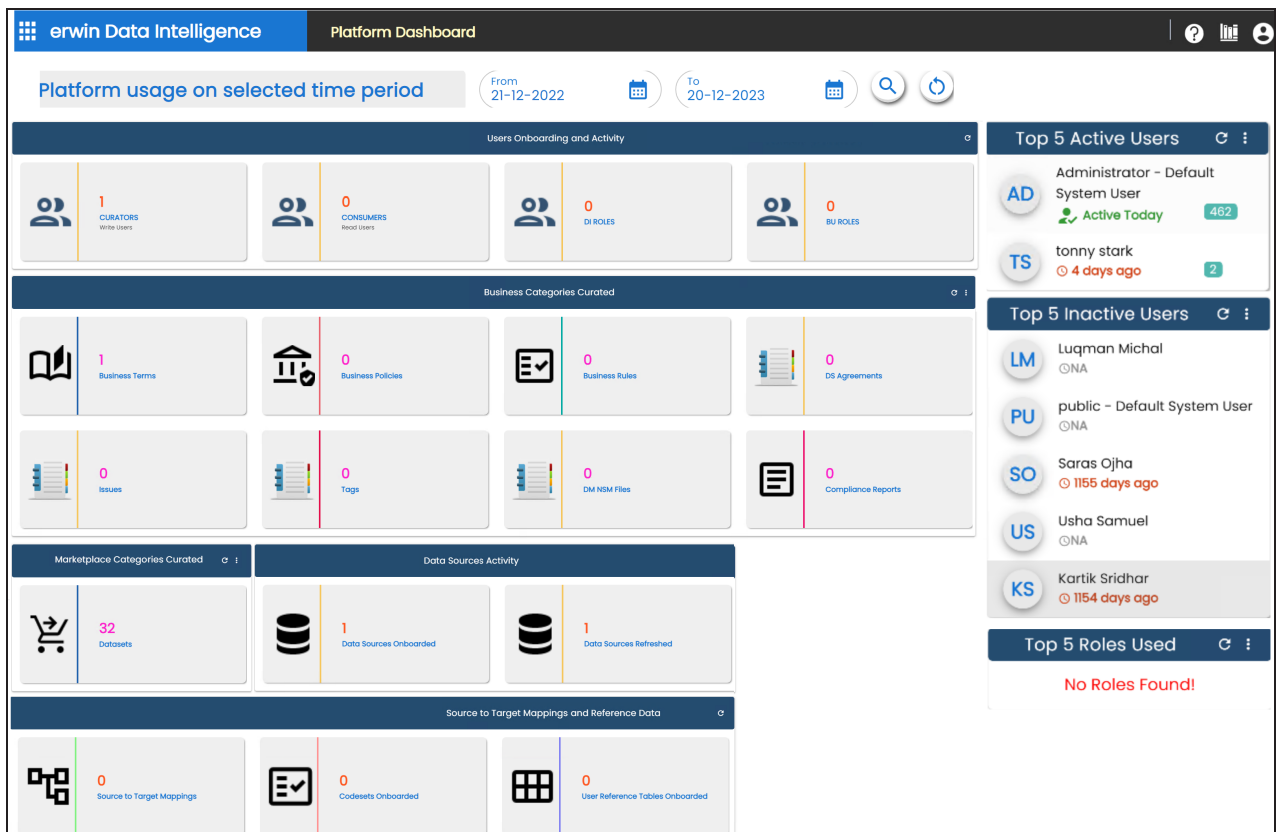
The Platform Dashboard module provides an overview of key metrics and insights related to user activities, business and marketplace assets, data sources, and mapping manager activities. It helps you to analyze the activities of different modules based on domains (catalogs) and creation trends of assets.



Ensure that the roles assigned to dashboard users have the necessary access and permissions. For more information, refer to the [Creating Roles](#) topic.

To access the Platform Dashboard, go to **Application Menu > Platform Dashboard**.




The Platform Dashboard page appears.





## Using Platform Dashboard

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Each card is clickable and displays information using charts or graphs that provide a snapshot of the underlying data.

You can use the Platform usage on selected time period option to filter module usage for specific time periods. To select a period, click  under From and To fields and then click . To reset the search results, click .

UI Section	Function
Users Onboarding and Activity	Displays the number of Curators (Write Users), Consumers (Read Users), DI Roles, and BU Roles.
Business Assets Curated	Displays the number of each type of business asset.
Business Categories Curated	Displays the number of each type of business category. This section is available only when you switch to Categories. To view this section, click  on the section title bar and select <b>Categories</b> .
Marketplace Assets Curated	Displays the number of each type of marketplace asset.
Marketplace Categories Curated	Displays the number of each type of marketplace category. This section is available only when you switch to Categories. To view this section, click  on the section title bar and select <b>Categories</b> .
Data Sources Activity	Displays the number of onboarded and refreshed data sources.
Source To Target Mappings and Reference Data	Displays the number of source to target mappings and reference data.
Top 5 Active Users	Displays a list of top five active users based on login count.
Top 5 Inactive Users	Displays a list of top five inactive users based on login count.
Top 5 Roles Used	Displays a list of top five roles based on login count.

Using the platform dashboard, you can view and analyze activity and usages of the following modules:



## Using Platform Dashboard

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- [Resource Manager](#)
- [Business Glossary Manager](#)
- [Marketplace Assets](#)
- [Metadata Manager](#)
- [Mapping Manager](#)

## Resource Manager

The Resource Manager dashboard displays:

- [Users Onboarding and Activity](#)
- [Top 5 Active Users](#)
- [Top 5 Inactive Users](#)
- [Top 5 Roles Used](#)

### Users Onboarding and Activity

The Users Onboarding and Activity section displays the number of Curators (Write Users), Consumers (Read Users), DI Roles, and BU Roles created during the selected period.



You can drill down to view a list of users and roles. For example, to view a list of users with Write access, click the **CURATORS** tile.

The Navigation pop-up appears. Clicking **Yes** takes you to the Resource Manager page. For example, the following image displays a list of users with Write access.

## Resource Manager

The screenshot displays the 'Resource Manager' interface within 'erwin Data Intelligence'. The main view is 'User Details' for the 'Administrator' user. The interface includes a left sidebar with 'USERS (26)' and a list of users. The main content area shows various user attributes and roles.

Field	Value
Login Type	Database
User ID	Administrator
User Full Name	Administrator - Default System U
Password	[Redacted]
Mobile	9999999999
Company Title	Administrator
Default Role	Admin
Created By	System
Last Modified By	System
Landing Module	Mapping Manager
User Image	[User Avatar]
Telephone Number	9999999999
Email ID	abc@abc.com
Alternate Telephone Number	9999999999
Manager Name	
Company	erwin, Inc.
Created Date Time	26-02-2020 03:48:28
Last Modified Date Time	26-02-2020 03:48:28
Theme	erwin
Language Preference	English
User Type	DI

User Roles	Role Description
Administrator	Administers the mapping manager module and gains administration access to all modules

## Top 5 Active Users

The Top 5 Active Users card displays a list of top five active users based on login count. The numbers next to a user's name indicate login count. For example, 509, 2.

The screenshot shows a 'Top 5 Active Users' card with a dark blue header. It lists two users with their login counts and activity status.

User	Active Status	Login Count
Administrator - Default System User	Active Today	509
tonny stark	12 days ago	2

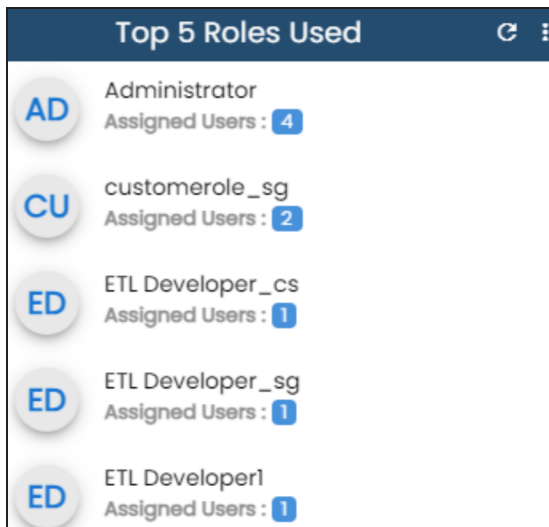
## Top 5 Inactive Users

The Top 5 Inactive Users card displays a list of top five inactive users based on login count.



## Top 5 Roles Used

The Top 5 Roles Used card displays a list of top five used roles based on login count. On the card, the number indicates how many users are assigned roles.



You can manage the displayed information using the following options:


## Resource Manager

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### Refresh ()

Use this option to refresh the data on the cards.

### More Options ()

Use this option to control the number of records displayed on the card. Click  and then select the required number. For example, if you select 10, then card title changes to Top 10 Active Users and displays a list of top ten active users.

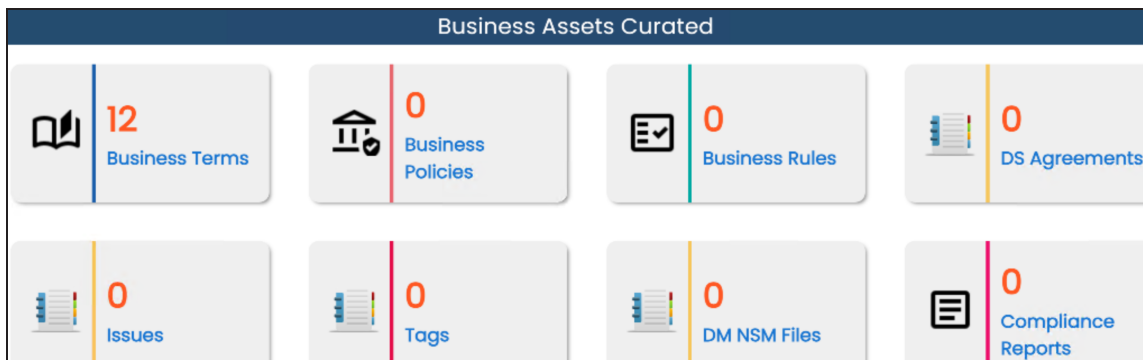
## Business Glossary Manager

The Business Glossary Manager dashboard displays:

- [Business Assets Curated](#)
- [Business Categories Curated](#)

### Business Assets Curated

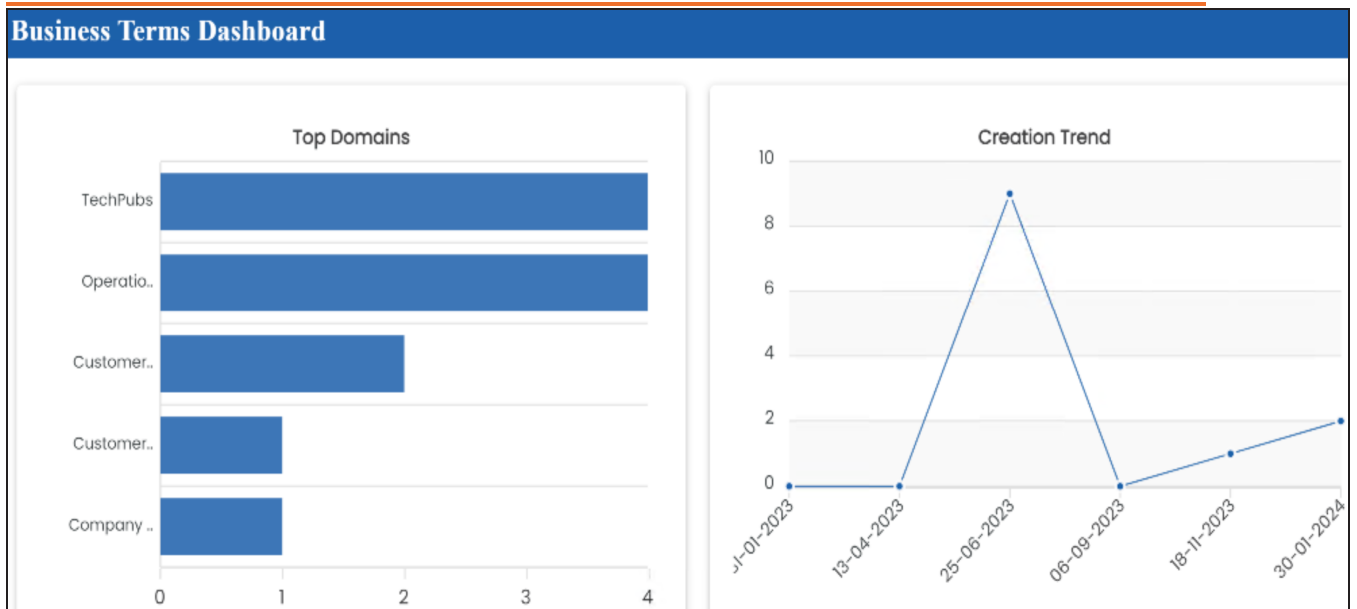
The Business Assets Curated section displays the number of assets under each business asset type created during the selected period.



You can drill down each tile to view detailed information. For example, to view business terms, click the **Business Terms** tile.

The Business Terms Dashboard appears.

## Business Glossary Manager



This dashboard displays the following information:

- **Top Domains:** By default, it displays the top domains (catalogs). Hover over a bar to view the total number of assets under a domain.
- **Creation Trend:** It displays month-wise asset creation trend based on the number of assets.

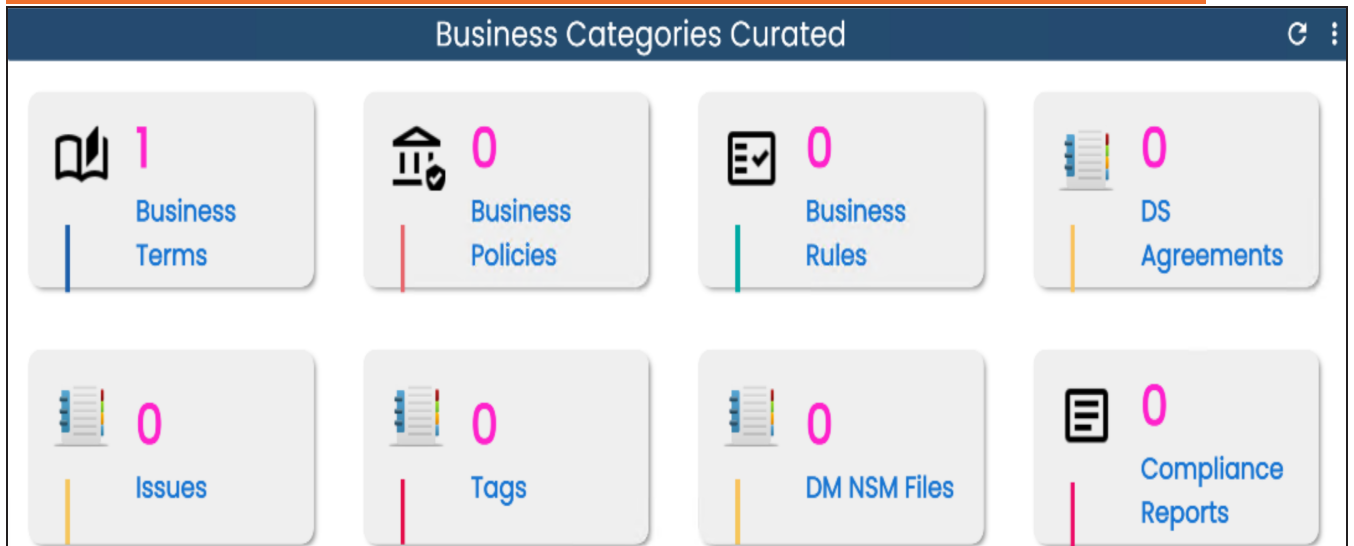
You can switch the card to view the business categories curated during the selected period.

To switch to categories, click  and then click **Categories**.

## Business Categories Curated

The Business Categories Curated section displays the number of each business category.

## Business Glossary Manager



You can drill down each tile to view detailed information. For example, to view business terms, click the **Business Terms** tile.

The Business Terms Catalogs page appears and displays the category Name, category Hierarchy, description, and created Date.

Business Terms Catalogs				
#	Category Name	Category Hierarchy	Description	Created Date
1	Operations	Operations		06-06-2023 14:07:59



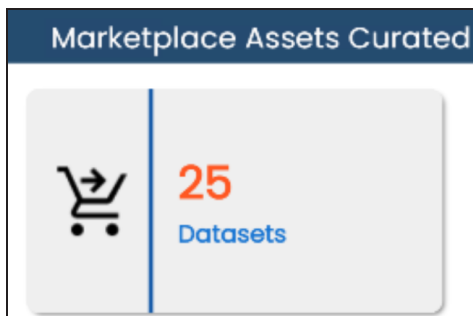
## Marketplace Assets

The Marketplace Assets dashboard displays:

- [Marketplace Assets Curated](#)

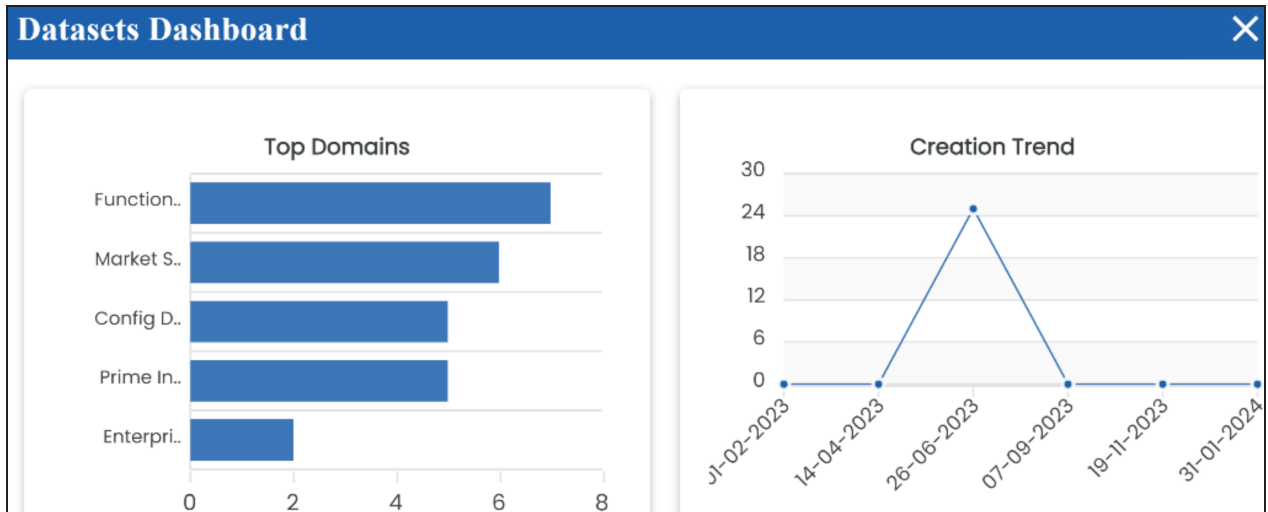
### Marketplace Assets Curated

The Marketplace Assets Curated section displays the number of assets under each marketplace asset type created during the selected period.



You can drill down to view detailed information. For example, to view datasets, click the **Datasets** tile.


The Datasets Dashboard appears.



## Marketplace Assets

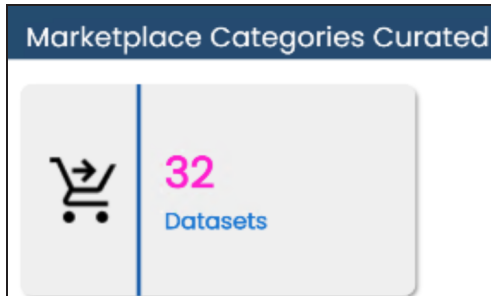
This dashboard displays the following information:

- **Top Domains:** By default, it displays the top domains (catalogs). Hover over a bar to view the total number of assets under a domain.
- **Creation Trend:** It displays month-wise asset creation trend based on the number of assets.

You can switch the card to view the marketplace categories curated during the selected period. To switch to categories, click  and then click **Categories**.

## Marketplace Categories Curated

The Marketplace Categories Curated section displays the number of marketplace category.



You can drill down to view detailed information. For example, to view datasets, click the **Datasets** tile.

The Datasets Catalogs page appears and displays category name, category hierarchy, description.

Datasets Catalogs			
#	Category Name	Category Hierarchy	Description
1	Config Datasets	Config Datasets	All docs related to config can be accessed here.
2	Prime Info	Prime Info	Primary Data Structure and Classification Group
3	Market State Data	Market State Data	Primary Data Structure and Classification Group

## Metadata Manager

The Metadata Manager dashboard displays:

- [Data Sources Activity](#)

### Data Sources Activity

The Data Sources Activity section displays the total number of onboarded and refreshed data sources created during the selected period.



You can drill down each tile to view detailed information. For example, to view on-boarded data sources, click the **Data Sources Onboarded** tile.

The Data Sources Onboarded page appears and displays system and environment names, database type, created by, and created date.

The screenshot shows a page titled "Data Sources Onboarded" with a filter dropdown set to "All". Below is a table with the following data:

#	System Name	Environment Name	Database Type	Created By	Created Date
1	System One	One Env	MS Excel File	Administrator	20-12-2023 06:25:14
2	Tech pubs	Spreadsheet Env	XML	Administrator	13-12-2023 06:54:01

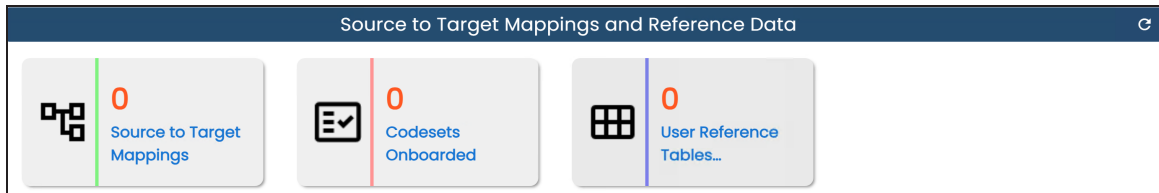
## Mapping Manager

The Mapping Manager dashboard displays:

- [Source To Target Mappings and Reference Data](#)

### Source To Target Mappings and Reference Data

The Source To Target Mappings and Reference Data section displays the total number of source to target mappings, onboarded codesets, and user reference tables created during the selected period.



You can drill down each tile to view detailed information. For example, to view source to target mappings, click the **Source to Target Mappings** tile. The Navigation pop-up appears. Clicking **Yes** takes you to the Mapping Manager page. To view mappings, click the **Mapping Manager Dashboard** pane.

For example, the below image displays the projects and mappings.

# Mapping Manager

