erwin Data Intelligence

Platform Dashboard Guide

Release v14.0

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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 understandin 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.

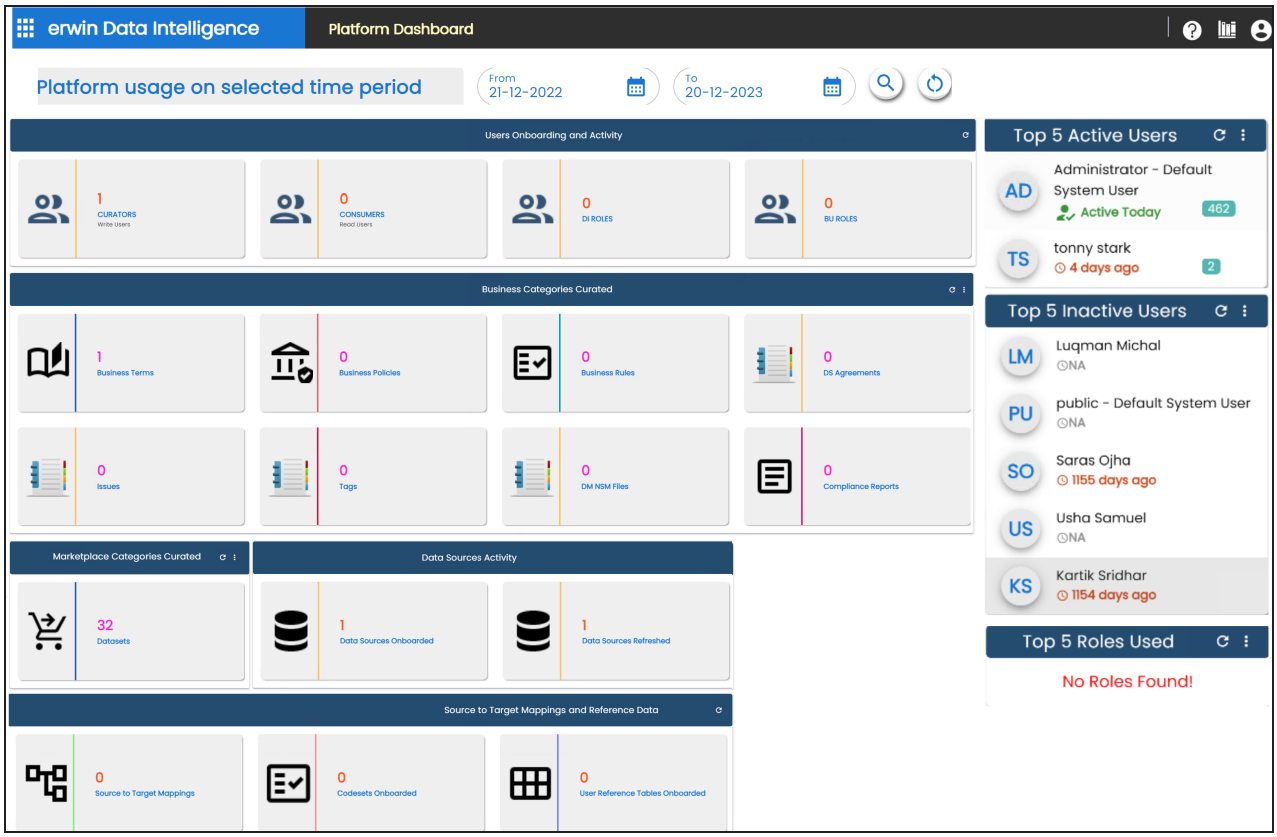
Using Platform Dashboard

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.



Each card is clickable and displays information using charts or graphs that provide a snap-shot 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 **Categories**.
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 **Categories**.
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:

- Resource Manager
- Business Glossary Manager
- Marketplace Assets
- Metadata Manager
- Mapping Manager

Resource Manager

The Resource Manager dashboard displays:

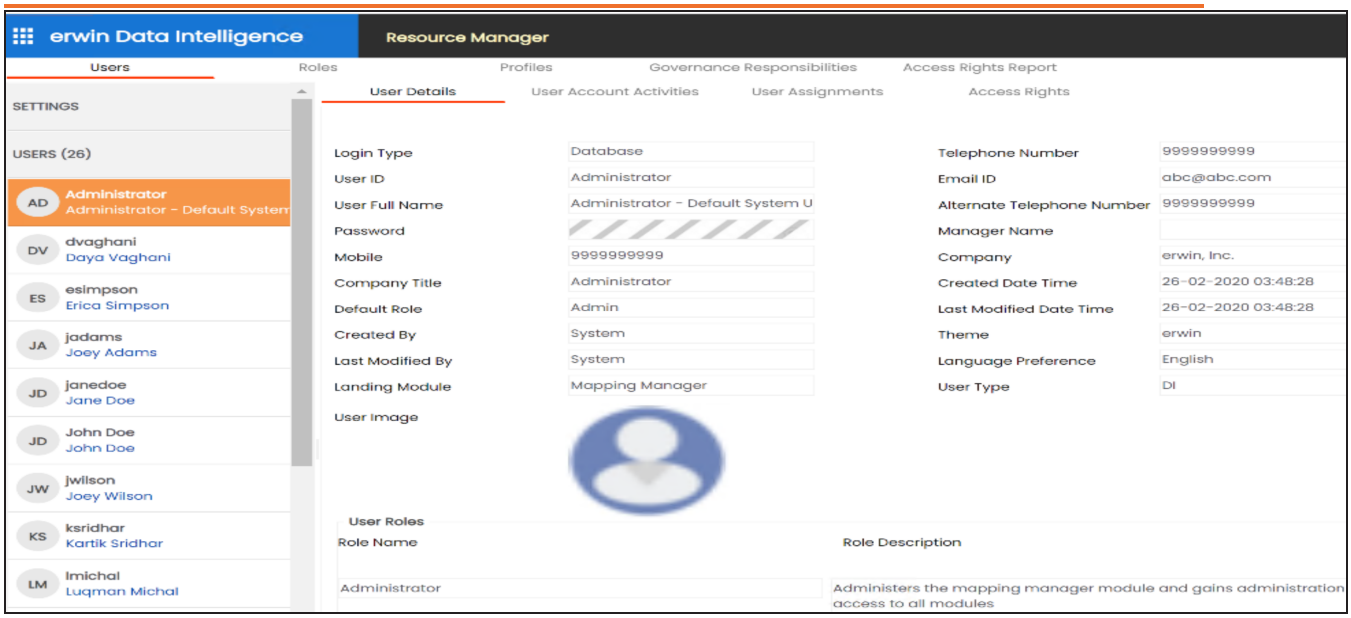
- Users Onboarding and Activity
- Top 5 Active Users
- Top 5 Inactive Users
- Top 5 Roles Used

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.

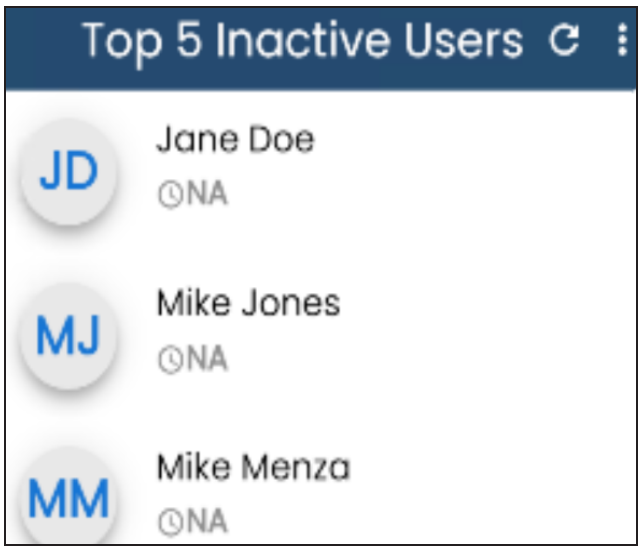


Top 5 Active Users

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.

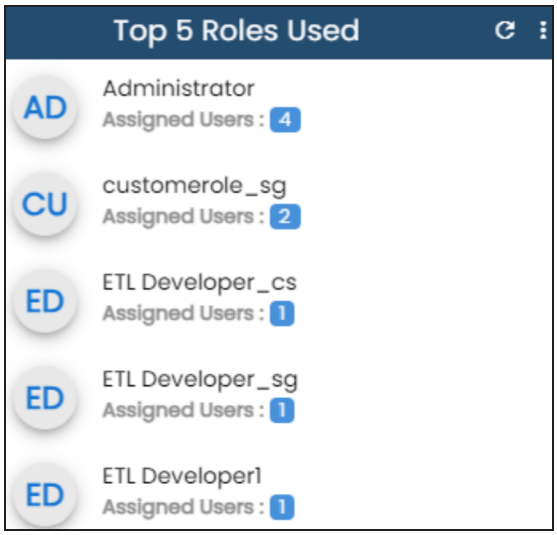
Top 5 Inactive Users

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:

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:

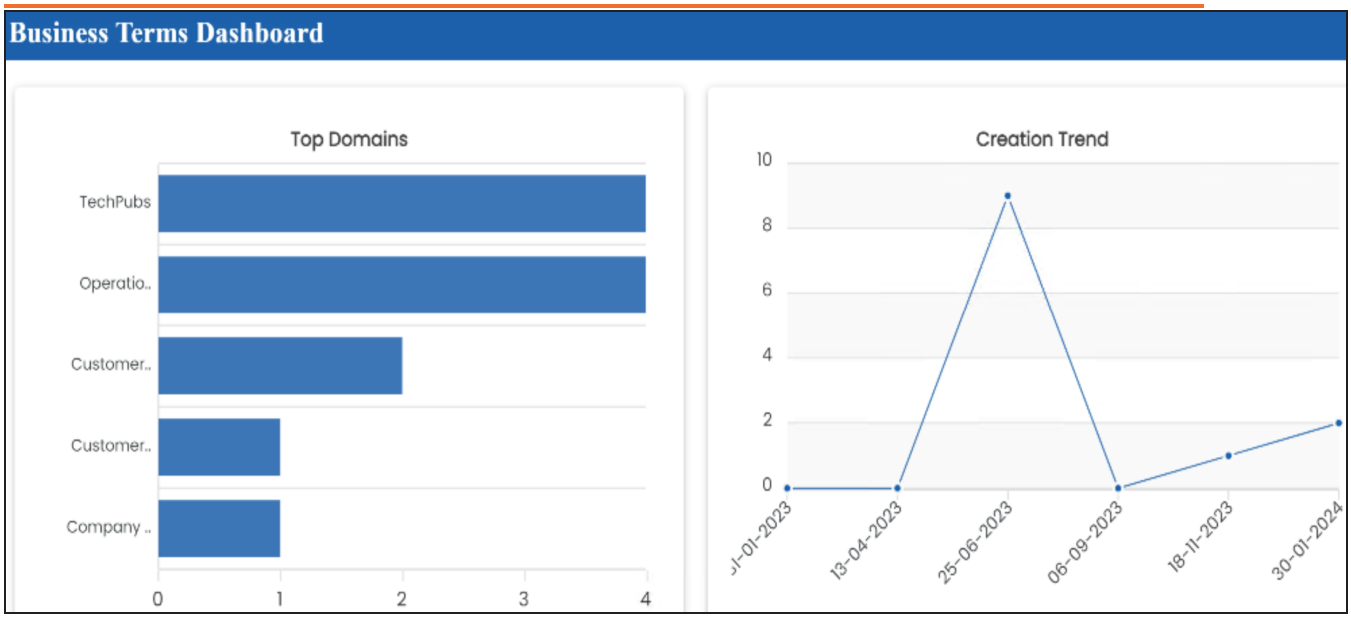
- Business Assets Curated
- Business Categories Curated

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.



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.

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.

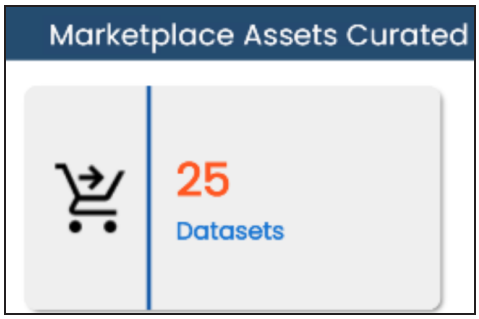
Marketplace Assets

The Marketplace Assets dashboard displays:

- Marketplace Assets Curated

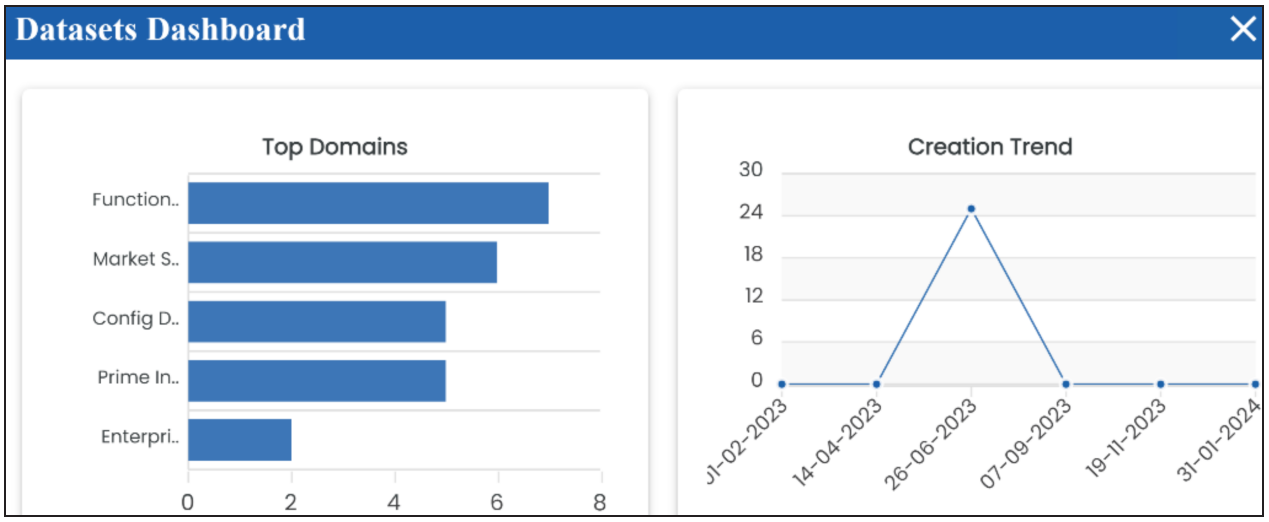
Marketplace Assets Curated

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.



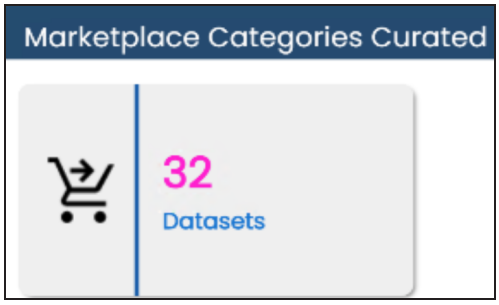
This dashboard displays the following information:

- **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**.

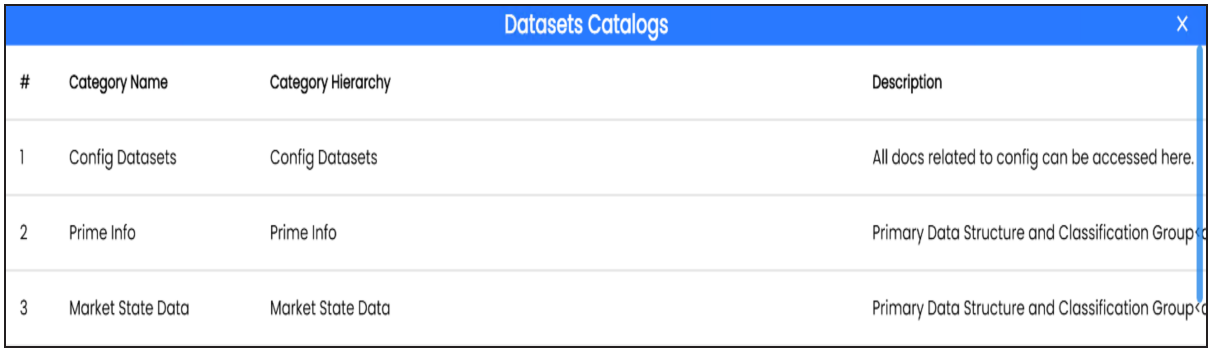
Marketplace Categories Curated

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.



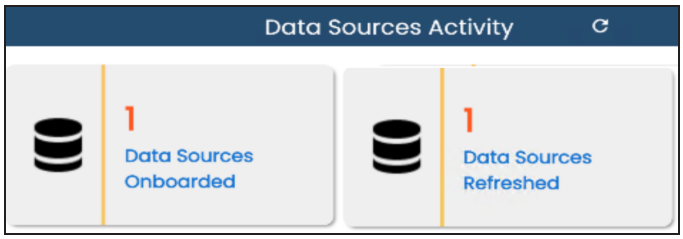
Metadata Manager

The Metadata Manager dashboard displays:

- Data Sources Activity

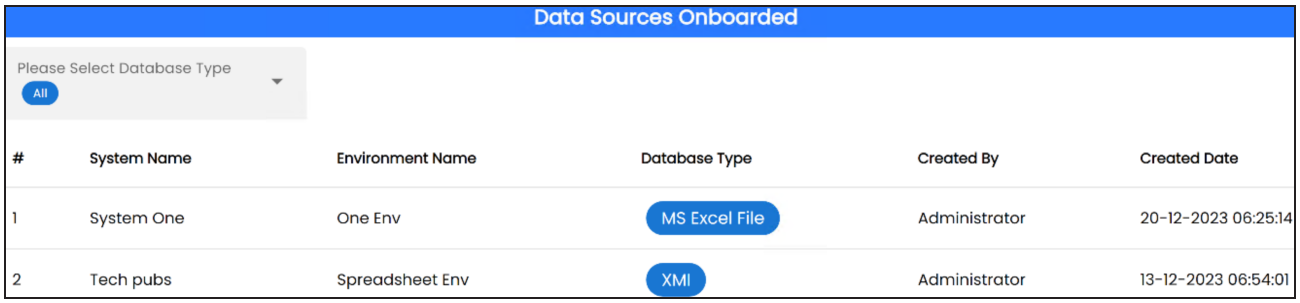
Data Sources Activity

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.



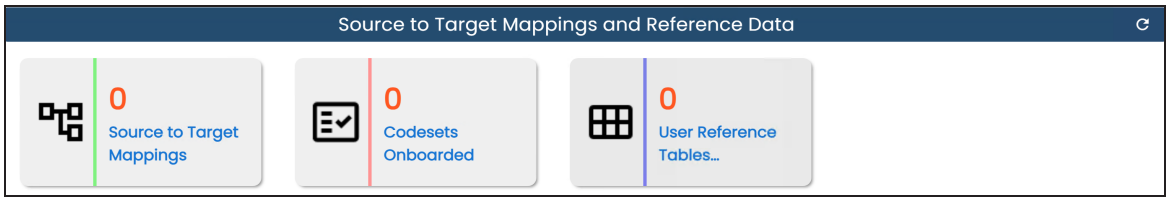
Mapping Manager

The Mapping Manager dashboard displays:

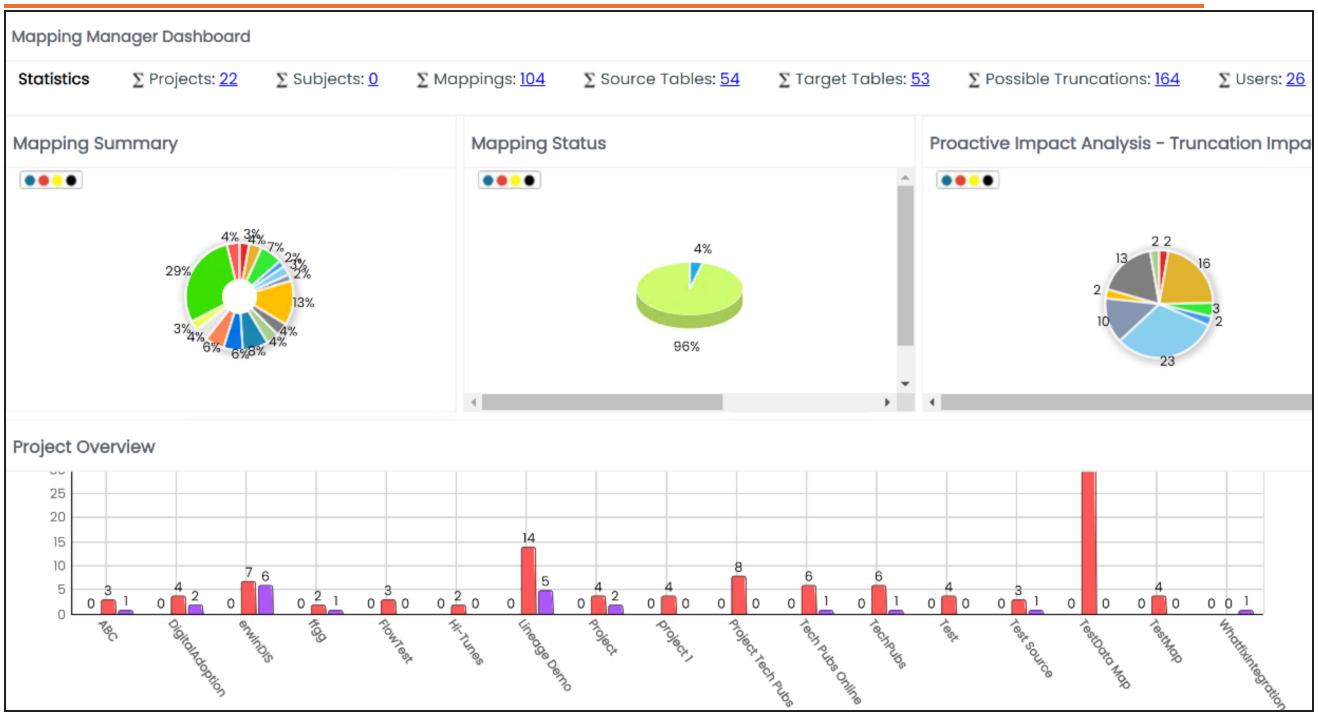
- Source To Target Mappings and Reference Data

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