

erwin Data Intelligence

Configuration Guide

Release v15.0



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Contact erwin

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Review support maintenance programs and offerings.

Registering for Support

Access the erwin support site and click Sign in to register for product support.

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- 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
- Other helpful resources appropriate for your product

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Configuration

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 manage configurations and layout preferences for the Discover Assets module. This page includes two tabs:

- Configurations
- Layout Config

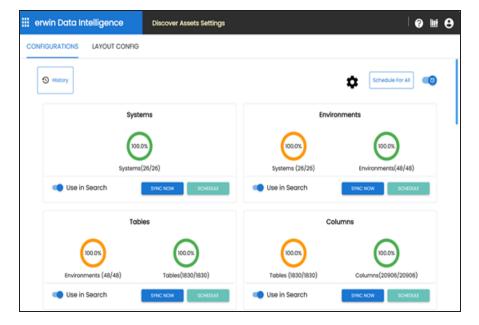
Configurations

The Configurations tab enables you to configure the Discover Assets module for asset property and value synchronization with respective modules. After synchronization for assets is completed, you can discover and analyze their status. You can also schedule synchronization jobs, control the 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.



2. On the **Configurations** tab, use the following options:

History (🕙)

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

(✿)

Use this option to select whether extended properties are included as filters for technical and business assets. Switch the **Include Extended Properties** option **ON**. The extended properties that are configured as filters are displayed in the Discover Assets module. You can configure the extended properties as filters for <u>technical</u> and <u>business</u> assets.

Schedule For All

Use this option to schedule a synchronization job.

(U)

Use this option to enable or disable scheduling of synchronization jobs for all asset types. This enables the **Schedule For All** option, and scheduling jobs at individual asset level is disabled.

3. On the asset type card, 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 <u>schedule synchronization jobs</u> for an asset type. This option is available only when the **Schedule For All** option is disabled.

Scheduling Synchronization Jobs

Apart from scheduling a sync job, you can manually sync the asset properties and values individually on the asset type card. To sync them manually, on an asset type card, click **Sync Now**.

To schedule synchronization jobs for asset types, follow these steps:

1. On asset type cards, click **Schedule**.

The Job Scheduler page appears.

Configuring Discover Assets

Job Scheduler	×
Job Name Discover Assets Data Syncing	
Schedule Job On 09-05-2025 07:11:03	i (
Local 🥑 Server	
Interval Every Day	•
Repeat Hours Minutes	
Object Types DS Agreements Issues Tags Systems Datasets Al Models Data Products Tables Environments S	s Ø
Object Types DS Agreements & Issues & Tags & Systems & Datasets Al Models & Data Products & Tables & Environments & Columns & Mappings &	s ©
Object Types DS Agreements Issues Tags Systems Datasets Al Models Data Products Tables Environments S	s 🛛
Object Types DS Agreements & Issues & Tags & Systems & Datasets Al Models & Data Products & Tables & Environments & Columns & Mappings & Send Email	S (2)

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

Field Name	Description
Job	Specifies the job name.
Name	For example, Discover Assets Data Syncing or Systems_1650468274963.

Configuring Discover Assets

Field Name	Description					
	This field automatically populates a job name and is non-editable.					
Schedule	Specifies the date and time of the job.					
Job On	For example, 26-03-2025 14:02:53.					
	Specifies whether the job uses local or server time.					
Local or	Local : Indicates that job uses date and time of your local machine					
Server	• Server: Indicates that the job uses the date and time of a machine where your application is deployed					
	Specifies the frequency of the job.					
	• Only Once: Indicates that the job runs only once					
Interval	Every Day : Indicates that the job runs every day					
	• Every Week: Indicates that the job runs weekly					
	• Every Month: Indicates that the job runs monthly					
	Specifies whether the job repeats every day. This field is available only					
Repeat	when Interval is set to Every Day. Additionally, you can set the repeat time					
Repeat	based on hours or minutes.					
	For example, 1 hours or 60 minutes					
Object Types	Specifies the object types for which the job should be scheduled. This field is available only when you use the Schedule For All option.					
Send	Specifies whether job notifications are sent to your email ID and the email					
Email	IDs mentioned in CC Email Id(s) field					
Email Id	This field is automatically populated with your email ID. You receive email					
	notifications about the scheduled job from the administrator's email ID.					
	Specifies the email IDs that receive job notifications other than you. Enter a					
	comma-separated list of email IDs that should receive email notifications					
ld (s)	about the scheduled job.					
	For example, ab.dav@xyz.com, cal.kai@xyz.com					

3. Click Submit.

The synchronization job is scheduled.

Layout Config

The Layout Config tab enables you to configure layout preferences for each asset type displayed on the Discover Assets dashboard.

To configure the layout preferences, follow these steps:

- 1. Click the Layout Config tab.
- 2. Select the asset type for which you want to configure the layout. For example, in the following image, Columns is selected, and available layout preferences are displayed.

CONFIGURATIONS LAYOUT CONFIG	
Systems	1
Environments	Layout Preferences
Tables	Custom Views
	You recently viewed
Columns	DQ Scores(Only When Native Profiling Enabled)
Mappings	Recently Curated
Reports	Top By Ratings
Business Terms	Top Views
Business Rules	Popular Tags
	Popular Classifications
Business Policies	My Action Center Status
DS Agreements	

- 3. Click 🧪.
- 4. Switch the required layout preferences on or off, and then click **a**.

The layout preferences are saved, and you can view them on the Discover Assets dashboard in the <u>Asset Workspace</u> section.

Configuring Discover Assets

							루
Systems 26		Environments	Ð	Tables 1830	⊞	Column: 20906	日
Mappings 118	ᅄ	Business Terms	血	Business B	Policies	Business 20	s Rules
HELPFUL LINKS V					Total : 2090	6 Favorite	Browse Columns 📀
Browse By Domain	Top Views		Popular Tags		My Action Center St	atus	
erwin DI	CustomerT	ypelD	Data Quality Sales	266 198	TASKS CREATED BY	0	
erwin DM >	Phone O		Default	2	TASKS ASSIGNED TO	ME	
erwin_MS Access Con	CATALOGS	_TYPE_ID			Key Stewardship Responsibilities	8	
erwinHR >	Company	lame	Popular Classifications			0	
Custom Views My Custom Views			Confidential PII Restricted	207 14 12	Data Stewards	9 >	
Shared by Other Users			Restricted Public	5			

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.
- <u>User Defined Fields</u>: 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:

	erwin Data Intelli	gence	Mapping Manager Settin	gs
•	Change Log	User Defined Fields	Version Display	Mapping State Settings
- Ma	pping Version Display Opti Standard Mapping Versior Version Label Do Not Display Version			
E.g.	If Mapping Details are as f	ollows:		
	Mapping Name: Datamart	Mapping		
	Mapping Manager Version	:: 1.03		
	Version Label : Version 21	2 Beta		
	Mappings in the Projects b	rowser will display as fo	llows depending on the option s	selected::
	Standard Mapping Version	: Datamart Mapping (v1	.03)	
	Version Label : Datamart N	Apping (Version 21.2 B	eta)	
	Do Not Display Version: Da	atamart Mapping		

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

a 🔜 Mappings	Add	litional Mapping	Information			
📰 BugTrial (v1.00)	•	Assignment	Specification Artifacts	Level of Effort	Change Log	Release
Data Integration (v1.00)	#	Log Id Cha	nged Log Description	Map Vers	ion Last Me	odified By
MappingTargets						
erwinSalesIntegration (v1.0 [,]		5 31 Used	Append option.	1.00	Administ	rator
SalesforceIntegration (v1.00						
TechPubsBUgTrial (v1.00)		6 30 New	target table added.	1.00	Administ	rator
FlowTest (0)						
4		7 25 Custo	om Table added.	1.00	Administ	rator

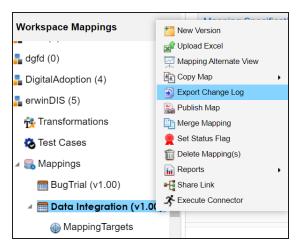
Enable export of Change Logs to MS Excel (at the Project Subject and Mapping Levels)

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.



Enable Change Log capture for Mapping Specification tabs

Configuring Change Log Settings

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.

Change Log	User Defined Fields	,	Version Display		
Table Metadata :					
 ✓ User Defined-1 ✓ User Defined-2 ✓ User Defined-3 ✓ User Defined-4 ✓ User Defined-5 		<u>s</u> s ss ss ss ss ss ss ss ss ss ss ss ss	User Defined-6 User Defined-7 User Defined-8 User Defined-9 User Defined-10		
 User Defined-5 User Defined-10 Note: These user defined flex fields are available at the table meta data level and can be used to tag additional meta data elements. User Defined Tabs : Additional Fields in User Defined Tabs 					

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

 BBT (1) BFSI Integration (1) 	Additional Mapping Information		
Carrefour (9)	ed1 User Defined2	User Defined3	User Defined4
Data Lake Migration (3)	•		
EDW (2)			
ERP (2)			
Erwin_Project (2)	User Defined4		
Test Cases			
🖌 🔜 Mappings			
Erwin_Map (v1.05)			
MappingTargets			
Archive			
K_New_Mapping (v1.			
Exeter (2)	h.		
IQVIA (1)	User Defined Field 1		
New_Project (1)	Osel Delified Field 1		
OBIEE (23)			
Sales Data Mart (8)			
•			

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.

Configuring User-defined Fields

Mapping Summary	Subject Details Extended Properties
' -	
Subject Name*	P_Name
Subject Description	This subject area contains mapping for the Sales data integration project. Subjects are organised based on the logical organisation.
Created By	Administrator Created Date Time 2019-10-30 11:44:51.983
Modified By	Administrator Modified Date Time 2020-04-06 19:24:35.547
Additional Fields	
User Field 1	

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

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.

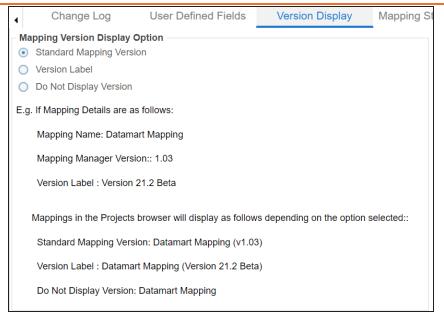
Version Label is specified while creating maps. You can also provide Version Label by editing the Map Spec Overview tab.

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.

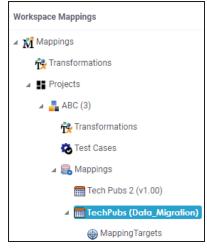
Configuring Version Display



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

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 <u>update a mapping specification</u> 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.

4	Change Log	User Define	ed Fields	Version Di	splay	Mapping	State Settings
Sta	te						
#	State Name	Created By	Create	ed Date Time	Last Mo	dified By	Last Modified
1	In Progress	SYSTEM	2020-0	2-26 03:48:31.	SYSTEM		2020-02-26 03:4
2	Approved	SYSTEM	2020-0	2-26 03:48:31.4	SYSTEM		2020-02-26 03:4

3. Click 🖸.

The New State page appears.

🗖 New State		_ 🗆 🗙
	≝ ×	
State Name*		

4. Enter State Name and click

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

Configuring Mapping State Settings

4	Change Log	User Defin	ned Fields	Version Di	splay	Mapping	State Settings	N	otifications	End To En	d L 🖡
Sta	te										+
#	State Name	Created By	Created	d Date Time	Last Mo	dified By	Last Modifie	ed Time	Edit	Delete	
1	In Progress	SYSTEM	2020-02-	-26 03:48:31.	SYSTEM		2020-02-26 0	3:48:31.4	/	18	•
2	Approved	SYSTEM	2020-02-	-26 03:48:31.	SYSTEM		2020-02-26 0	3:48:31.4	/	12	
3	Approval Pendir	nç Administrator	2020-12-	-04 13:12:41.	Administr	ator	2020-12-04 1	3:12:41.	1		
											•

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.

📄 New Sub State		_ 🗆 🗙
Cub State Name*	ĽX	
Sub State Name*		

2. Enter Sub State Name and click

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

Configuring Mapping State Settings

Sub	State				÷
#	State Name	Created By	Created Date Time Last Modified B	y 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.

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 <u>Configuring Email Settings</u> topic.

To configure notifications, follow these steps:

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

The following page appears.

Change Log	User Defined Fields	Version Display	Mapping State Set	ttings Noti	fications	End To End Lineage
Mapping Manager						
Email Subject Mapping Assignments:	Mapping Manager User	Successfully Added - D	O NOT REPLY	Email Body	User @Use @Passwo The defau <i>Note: Thi</i> <i>monitore</i>	erFullName@, erId@ has been successfull rd@.This user has been Ilt role for this user is @ is is an auto generated e d. not reply to this email.
Email Subject	Mapping Manager Assi	gnment Status - DO NO	TREPLY	Email Body	or Assignr <u>Mapping</u> Project N Mapping	

3. Click 2.

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 <u>Creating Users and Assign-ing Roles</u> 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.

For more information on mapping assignment, refer to the <u>Assigning Mapping</u> <u>Specifications to Users</u> topic.

Forgot Password

Use this section to configure email notifications to users who forgot their Username (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.

	Version Display	Mapping State Settings	Notifications	,
`				
- 3	Send Mail On			_
	New Mapping:			
	🗹 Email			
	Comments			_
	Email Subject			
	Email Subject			
	New Mapping Details - D	ONOT REPLI		
	Email Body			
	Hi,			
	,			
	This is a system generated	d email notification.		
	NEW MAPPING(s) HAS	BEEN CREATED.		
	Project Name :@targetP Subject Name: @targetS			
	Mapping Name(s):@tar			
	Mapping Id(s): @target			
	Mapping Version:@targe Created By: @targetMap			
	cicated by. wargetilap	pingereaccuby@		

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.

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 <u>Creating Maps</u> topic. **Save Mapping**: Use this section to send email notifications and comments to project users on updating a mapping specification grid.

Version Display	Mapping State Settin	gs Notifications
Save Mapping:		
Email		
Comments		
Email Subject		
Save Mapping Details - D	O NOT REPLY	
Email Body		
Hi,		
This is a system generated	email notification.	
. 5		
A MAPPING HAS BEEN	SAVED.	
Project Name:	@targe	etProjectName@
Subject Name:	@targe	etSubjectName@
Mapping Name:	@targe	etMappingName@
	î	

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.

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.

4	Version Display	Mapping State Settings	Notifications	۲
	New Version:			•
	Comments			
	Email Subject New Version Details - DO	NOT REPLY		
	Email Body			
	Hi, This is a system generated	email notification.		
	A MAPPING HAS BEEN V	ERSIONED.		
	Project Name :@targetPro Subject Name: @targetSu Mapping Name:@targetM Mapping Id: @targetMappt Mapping Version:@target	bjectName@ appingName@ ingId@		
	Created By: @targetMappi			

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 <u>Creating</u> <u>Versions of Maps</u> 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.

Version Display	Mapping State Settings	Notifications
Merge:		
 Email Comments 		
Comments		
Email Subject		
Merged Mapping Detai	Is - DO NOT REPLY	
Email Body		
Hi,		
This is a system generat	ed email notification.	
	N MERGED WITH UPDATES FR	ON ANOTHER MARRING
A MAPPING HAS BEEI	MERGED WITH OPDATES FR	OM 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.

Version Display	Mapping State Settings	Notifications
Copy/Paste:		
🗹 Email		
Comments		
Email Subject		
Copied Mapping Detail	s - DO NOT REPLY	
Email Body		
Hi,		
This is a system generate	ed email notification.	
		JE CODY/DASTE EUNCTI
	CREATED/OFDATED USING IT	
A MAPPING HAS BEEN	•	
A MAPPING HAS BEEN	ORIGIN	DESTINATION
	-	-

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.

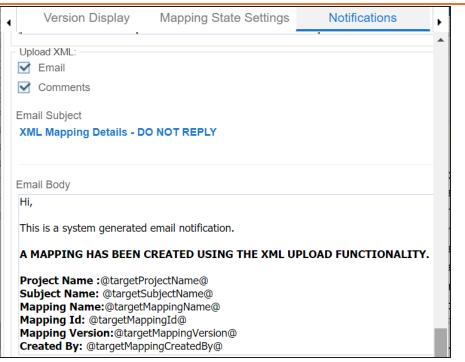
Email Subject: You can edit the default email subject and use a custom email subject.

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 <u>Branching Mappings</u> 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



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 <u>Base-lin-ing Projects</u> 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.
- <u>Data Quality Notification</u> and <u>Settings</u>: 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:

	erwin Data	Intelligence	Metadata N	Manager Settings				2 🛄	θ
۰.	Table & Co	umn Class	Notification	Version Displ	ay D	ata Quality	Data Access/P	review Se	ttings
Tal	ble Class								+
#	Table Class	Table Class Description	Created By	Created Date Time	Last Modified By	Last Mod Time	lified Date Edit	De	elete
1	Table_Class	This is a user-defined	Administrator	07-12-2020 05:42:41	Administrator	07-12-20	20 05:43:55		×
Col	lumn Class								•
#	Column Class		Created By	Created Date	Time Last Mo		ast Modified Date Fime	Edit	De
1	Column_Class		Administrator	07-12-2020 0	5:47:21 Administr	rator (07-12-2020 05:47:21	/	

You can set up the Metadata Manager with respect to <u>user defined fields</u> 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.

	erwin Data	Intelligence	Metadata N	lanager Settings				
۰.	Table & Col	umn Class	Notification	Version Displ	ay I	Data Quality	Data Access/P	review Settings
Та	ble Class							Ð
#	Table Class	Table Class Description	Created By	Created Date Time	Last Modified B	y Last Modi Time	fied Date Edit	Delete
1	Table_Class	This is a user-defined	Administrator	07-12-2020 05:42:41	Administrator	07-12-202	0 05:43:55 🖍	*
∢ Co	lumn Class			_				÷
#	Column Class		Created By	Created Date	Time Last Mo		ast Modified Date me	Edit Del
1	Column_Class		Administrator	07-12-2020 0	5:47:21 Administ	rator 0	7-12-2020 05:47:21	1

2. Under the Table Class section, click 💽.

The Add Table Class page appears.

Add Table Class		_ 🗆 ×
	Li 🗙	
Name*		
Description		
Note* :This change is per	manent and applied across existing records.	

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.

4	Table & Column Class		Notification	Version Display				
Т	Table Class							
#	ŧ	Table Class	Table Class Description	Created By	Created Date Time			
	1	Table_Class	This is a user-def	ined Administrator	2020-12-07 05:42:41.			

5. Use the following options:



To edit the table class, click 🖍.



To delete the table class, click **X**.

To configure column classes, follow these steps:

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

The Add Column Class page appears.

🗖 Add Column Cla	SS		_ 🗆 ×
		Li X	
Name*]
Description			

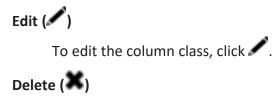
- 2. Enter the Name and the Description of the column class.
- 3. Click 💾.

Configuring Table and Column Classes

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

Colu	Column Class					
#	Column Class	Column Class Created By Description	Created Date Time Last Modified By	Last Modified Date Edit Time	Delete	
1	Column_Class	This is a user-defined Administrator	2020-12-07 05:47:21.4 Administrator	2020-12-07 05:47:21.	×	
					-	

4. Use the following options:



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 <u>Updating Table Properties</u> topic.

For more information on column properties, refer to the <u>Updating Column Properties</u> 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 <u>Admin Email Id</u> 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.

Table & Column Class	Notification	Version Display				
Scan MetaData						
Email						
Email Subject						
Metadata Scan Job Execution Status - DO NOT REPLY						
Email Body						
Hi,						
This is a system generated emai	Inotification					
This is a system generated entai	nouncation					
@executionMessage@						
]				
Job Details						
Job Name :	@jobName@					
Job Owner :	@jobOwner@					
	OsystemName					

- 3. Click 2.
- 4. Use the following options in the Scan Metadata section:

Email

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

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 💾.

The email notification is configured.

For more information on scheduling a metadata scan, refer to the <u>Scheduling Metadata</u> <u>Scans</u> 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 <u>Creating Environments</u>.

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

•	Table & Column Class	Notification	Version Display
- En	vironment Version Display Option Standard Environment Version		
0	Version Label		
0	Do Not Display Version		
E.g	. If Environment Details are as follows:		
	Environment Name: Datamart Environme	ent	
	Metadata Manager Version: 1.03		
	Version Label: Version 21.2 Beta		
	Environments in the Projects browser will	display as follows dependin	g on the option selected:
	Standard Environment Version: Datamar	t Environment (v1.03)	
	Version Label: Datamart Environment (V	ersion 21.2 Beta)	
	Do Not Display Version: Datamart Enviro	onment	

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 <u>Email</u> <u>Settings</u>.

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.

4	& Column Class	Notification	Version Display	Data Quality
4	Notification	Settings		
	Data Quality			
	🗹 Email			
	Email Subject			
	Data Profile A	ssessment Job Details @jobna	me@/@systemname@/@envna	me@/@tablename@
	Email Body			
	Hi,			
			Data Profile A	ssessment Job De
		e:@systemname@		
		: Name : @envname@ : @tablename@		
	Job Owner :			
		te Time : @jobStartedDateTime@ ion Date Time : @jobExecutedD		
		on : @jobExecutedDuration@		

- 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.

Email Subject

Configuring Notifications on Profiling Data

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 <u>Profiling Data at</u> <u>Table Level</u> topic.

Configuring Data Profiling and DQ Scores

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

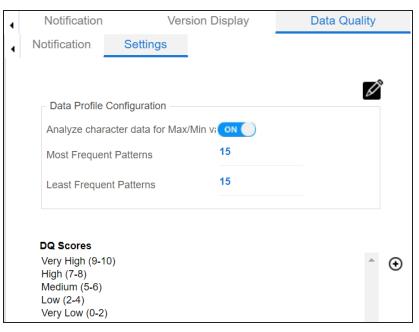
Configuring data profiling parameters involves specifying:

- 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

Configuring Data Profiling and DQ Scores

This option specifies whether the data profiling requires to analyze character data for maximum and minimum. Switch 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 \odot .

The DQ Score Options page appears.

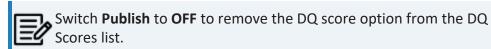
Configuring Data Profiling and DQ Scores

DQ Score Options		
⊕ Ц		
Кеу	Value	Publish
Very High (9-10)	Very High (9-10)	
High (7-8)	High (7-8)	
Medium (5-6)	Medium (5-6)	
Low (2-4)	Low (2-4)	
Very Low (0-2)	Very Low (0-2)	

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.



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 <u>Profiling Data at Table Level</u> 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.

4	Change Log	User Defined Fields	Version Display	Mappir	ng State Settings	Notific	ations En
Ta	Table Metadata :			Colum	ns Metadata :		
	User Defined-1	User Defined-6		\checkmark	User Defined-1	\checkmark	User Defined-6
	User Defined-2	User Defined-7		\checkmark	User Defined-2	\checkmark	User Defined-7
	User Defined-3	User Defined-8		\checkmark	User Defined-3	\checkmark	User Defined-8
	User Defined-4	User Defined-9		\checkmark	User Defined-4	\checkmark	User Defined-9
	User Defined-5	User Defined-1	D	\checkmark	User Defined-5	\checkmark	User Defined-10
	Note: These user defined flex fields are available at the table meta data level and can be used to tag additional meta data elements.				ote: These user defined an be used to tag additio		
	User Defined Tabs :			Subject	t User Defined Fields :		
	Additional Fields in User Defined Tabs			~	Additional Subject L	Iser Define	d Fields

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.

	erwin Data Intelligence		Codeset Ma	anager Settings
4	Codeset Manager			
			Ø	
	Code Value Grid Page Size	0		
	Note: Set number of records to display per	page in the	code value gri	d.
	Code Mappings Grid Page Size	0		
	Note: Set number of records to display per	page in the	code mapping	grid(For a selected code mapping).
	Code Mappings Details Grid Page Size	0		
	Note: Set number of records to display per grid).	page in the	code mapping	s details grid(Total number of mapping

2. Click 🖉.

The Edit CSM Settings page appears.

Edit CSM Settings	_ 🗆 ×
	≝⊻
Code value Grid Page Size*	0
Code Mappings Grid Page Size*	0
Code Mappings Details Grid Page Size*	0
Note * : Please put page size less than 10 performance.	0 for better

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.



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.
- <u>Environments for release objects</u>: 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:

	erwin Data II	ntelligence	Release Man	ager Settings	😗	•••••••••••••••••••••••••••••••••••••••
	Environments	Release Object Types	Release Status	History Types	Notifications	Mapping
En	vironments Listing	1				+
#	Name	Description			Environmen Color	t Options
1	DEV					
2	TEST					1 × -9
3	PROD					
4	Staging	This is the staging environ	ment for Mapping o	object		1 × -9

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 > Settings> Release Manager.

The following page appears.

	erwin Data Ir	ntelligence	Release Mana	iger Settings	?	• •
	Environments	Release Object Types	Release Status	History Types	Notifications	Mapping 🖡
Env	vironments Listing	1				٠
#	Name	Description			Environment Color	Options
1	DEV					
2	TEST					1 × 9
3	PROD					
4	Staging	This is the staging environr	ment for Mapping ob	oject		🖊 🗙 🖓

2. Click 🛨.

The New Environment page appears.

New Environment	_ 🗆 ×
	≝×
Name:*]
Description:	
Environment Color	

- 3. Enter the Name and Description.
- 4. Choose Environment Colour.

Configuring Environments for Release Objects

New Environment				_ 🗆 X
Name:* Description:	Testing Testing stage for th			
Environment Color		#fffff	Hue 0 Sat 0 Lum 100	Red 255 Green 255 Blue 255
			Select	Cancel

- 5. Click Select.
- 6. Click

The environment is added.

4	Environme	nts Release Object Ty	pes Release Status	History Types	Notificati		
E	Environments Listing						
#	Name	Description		Environment Color	Options		
	1 DEV						
2	2 TEST				1 × 9		
3	B PROD						
2	1 Staging	This is the staging envir	onment for Mapping obje	ect	1 × 9		

Edit

To edit the environment, click 🖍.

Delete

To delete the environment, click **X**.

History

Configuring Environments for Release Objects

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.

	erwin Data I	ntelligence	Release Man	nager Settings	?	• 8
۰.	Environments	Release Object Types	Release Status	History Types	Notifications	Mapping 🖡
Env	vironments Listing	9				+
#	Name	Description			Environmen Color	t Options
1	DEV					
2	TEST					1 × 1)
3	PROD					
4	Staging	This is the staging enviro	onment for Mapping o	object		1 × 9

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

-		0	3 71				
	•	Environments	Release Object Types	Release Status	History Types	Notifications	Mapping Prom
	Rel	ease Object Li	isting				Ð
	#	Name	De	escription			Options
	1	DDL Script					∕ × [↑]
	2	DML Script					/ x ·
	3	SQL Script					/ x ·
	4	Data Item					
	5	Code Set					
	6	Code Map					

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 \mathfrak{P} .

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 > Settings > Release Manager.
- 2. Click Release Status.

The Release Status Listing appears.

4	Environments	Release Object Types	Release Status	History Types	Notifications	Mappin	g Pro	motion	÷
Re	elease Status Li	sting							+
#	Name	Desc	ription	Release F	Preview Migrati Previev	on Object v	Opt	ions	
1	PENDING AF	PROVAL		PENDING /	APPRO\ PENDIN	G APPRO		×	Ð
2	PENDING CO	DNFIRMATION		PENDING	CONFIR PENDIN	G CONFIR	/	×	Ð
3	VALIDATED			VALIDATEI	d validat	ED	/	×	Ð

3. Click 🖸 to define a new status.

The New Release Status page appears.

Configuring Release and Release Object Statuses

	Li ×
~	
IS	
×	

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.
	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.
Release Status	Border	Click the cell and select the required border colour for
	Color	the Release Status.
	Border	Coloct the required border type for the Balazce Status
	Туре	Select the required border type for the Release Status.
	Preview	You can view the preview of the release status based

Configuring Release and Release Object Statuses

Field Name	Sub-Field	Description
		on your above selections.
	Text Colour	Click the cell and select the required text colour for the Object Status.
	Background	Click the cell and select the required background colour for the Object Status.
Migration Object	Border Col-	Click the cell and select the required border colour for
Status	our	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 **X**.

History

To view history details, click •9.

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 > Settings > Release Manager.
- 2. Click History Types.

The History Listing Grid page appears.

4	Environments	Release Object Types	Release Status	History Types					
Hi	History Listing Grid								
#	Name	Description		Options					
1	ADD	Add Record		1					
2	EDIT	Edit Record		1					
3	VIEW	View Record Details	5	1					
4	DELETE	Delete Record		1					
5	LIST	List Records		1					
6	STATUSCHAN	GE Changed Status		1					

3. To edit the description, click

The Edit History Types page appears.

Configuring History Types

Edit HistoryTypes		_ 🗆 X
		×
Name:*	ADD	
Description:	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 > Settings > Release Manager.
- 2. Click Notifications.

The following page appears.

 Environments 	Release Object Types	Release Status	History Types	Notifications	Mapping Promotion	
Release Manager						Ø
Reset Password:						
Email Subject	CMM Admin - Your pas	ssword is reset	Email Body	в I Ц 🖌		
					NAME%>\n Password: %>\n This is an automated It reply to this mail	•
Migration Object:						
Email Subject	CMM Migration Objec	t				

- 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 <u>Email Settings</u>.

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 > Settings > Test Manager.

	erwin Data Intelligend	e	Test Manager	Settings		? 🖩 8
- ۱	Test Case Type Name					•
#	Test Case Type Name	Published	Created By	Created Date	Last Modified By	Last Modified Date
1	ALT-SCENARIO	Y	SYSTEM	26-02-2020 03:48:32	SYSTEM	26-02-2020 03:48
2	Application Upgrades	Y	SYSTEM	26-02-2020 03:48:32	SYSTEM	26-02-2020 03:48
3	Data Completeness Testing	Y	SYSTEM	26-02-2020 03:48:32	SYSTEM	26-02-2020 03:48

2. Click 🛨.

The following page appears.

Test Case Type Name		_ = ×
Published	OFF	
Test Case Type Name*	l	

3. Type the Test Case Type Name and Switch **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:

- <u>Templates</u>: 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.
- <u>Email settings</u>: 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.
- <u>Version display</u>: 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:

	erwin Data Intelligence		Requirer	nents Manager \$	Settings		? 📖	8
۰.	Templates Email	l Setti	ngs Ve	rsion Display				÷
Sp	ecification Templates Workspace ⊀	Ten	nplates Summary					>
4	Specification Templates	#	Template Name	Template Description	Created By	Created Date	Modified By	Modif Date
	 Default TechPubs 							
		1	<u>Default</u>	Default Template	Administrator	26-02-2020 03:48:32	Administrato	26-02-2
		2	TechPubs		Administrator	08-07-2020 04:27:16	Administrato	08-07-2

Creating Templates

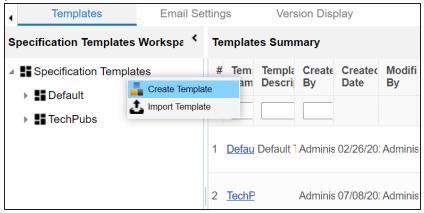
You can create customized requirement templates and use them to create requirement specifications.

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

Create Template			_ 🗆 >
			×
Template Name*			
Template Description			
<u>а</u> <u>н</u> В	Ι∐	ŧ≡ t ≣ t ≣	*≣
			•
			-

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:

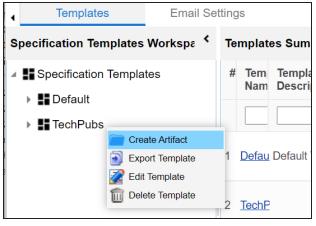
- Add artifacts to the template
- Design custom forms for artifacts
- Manage artifacts
- Manage templates

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.

ifact Name* ifact Description T A H B I U = = = = I				×
ifact Description				
ifact Description				
<u>■ A H</u> B Z U ≡ ≡ ≡ ■				
		= =	•≡	*≣
				-
e Node Policy				
splay Always				~
oport Documents Upload	OFF			
able Description	OFF			

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	Specifies the description about the artifact.
	For example: The artifact can document all decisions for Person and
	Enrollment module.
	Specifies the artifact's visibility in the artifact tree in the Requirements
Tree Node	Manager. Select an appropriate Tree Node Policy for the artifact:
Policy	Display Always:
	Displays the artifact in the artifact tree.

Adding Artifacts to Templates

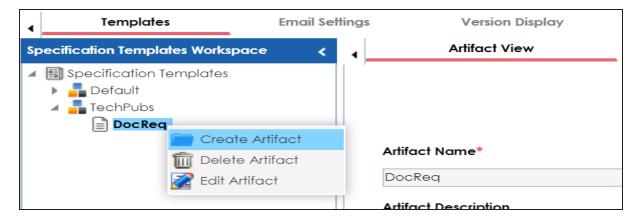
Field Name	Description
	Don't display for single child:
	Does not display the artifact in the artifact tree.
	Display on multiple child nodes:
	Displays artifacts when it has more than one child artifacts.
Support Docu	Enables the document upload section for the child artifacts.
Support Docu- ments Upload	Switch the Supporting Documents Upload option ON to upload doc-
	uments.
Enable	Enables you to add a description to the child artifacts.
Description	Switch the Enable Description option ON to enter a description.
	Specifies the mail comments that are sent to project users.
Mail Com-	For example: This artifact is a part of Health Migration Template.
ments	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.

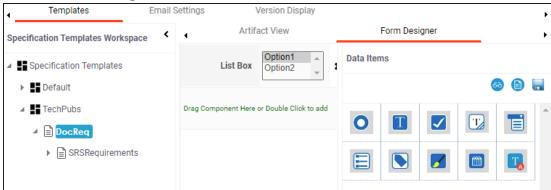
4	Templates	Templates Email Se		Settings Version Display					
s	pecification Templates	Workspa	<	4		Ar	tifacts D)etails	
4	Specification Templa	tes		Ar	tifacts	Listing	I		
	▶ ∎∎ Default			#	Artif Nam	Artifac Descri		Created Date	Modif By
	TechPubs								-
	🔺 📄 DocReq								
	SRSRequire	ements		1	<u>DocR</u>		Adminis	07/15/20	Admin

Once you have added an artifact to a template, you can create custom forms for the artifact.

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

 Artifact View 	Form Des	signer		•
List Box	Option1 Option2	Data Items		
Radio Button	Option1 Option2	0		
Drag Component Here or Doubl	e Click to add to form designer			•
		Properties		
		Property	Value	
		Name	radiobutto	on383
		Label	Radio Bu	tton
		Туре	Radio	•

The properties differ based on the UI element you select.

Refer to the following table for property descriptions:

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

Property	Description
Enabled	Specifies whether the field is available on the form.
LIIdbled	Select the Enabled check box to enable the field on the form.
	Specifies whether the field is mandatory on the form.
Mandatory	Select the Mandatory check box to make the field mandatory on the
	form.
Control	Specifies the width of the control option.
Width	For example, 95%.
Width	Double-click the corresponding value cell to change it.
	Specifies the label's text style of the field.
Label Style	Click to select a text style.
Construct Chulo	Specifies the text style in the input field.
Control Style	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.
	Specifies the list of values applicable for this field.
	For example:
	Draft
List	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 🔙.

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.

Artifact View	Form Des	signer		*
List Box	Option1	Data Items	& A	
Radio Button	Option1 Option2	0		•
Drag Component Here or Double	e Click to add to form designer			-
		Properties		
		Property	Value	
		Name	radiobutton383	•
		Label	Radio Button	
		Туре	Radio	•

2. Click the cell containing Option 1.

You can view the properties of the data item.

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.

Artifact View	Form De	signer					•
List Box	Option1 Option2	Data Items			68	•	
Gender	Option1 Option2	0		T			4
Drag Component Here or Doubl	e Click to add to form designer						•
		Properties					
		Property		Value			
		Name	r	adiobutto	on383		
		Label	(Gender			
		Туре	F	Radio			•

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

Radio Options	_ 🗆 ×
⊕ 💾	
Text	Value
Option1	Option1
Option2	Option2

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

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

Designing Forms



6. Click \odot to add more options.

One row is added.

7. Double-click the cells to enter the option.

Radio Options	_ _ ×
⊕ ∦	
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	

9. 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.

Templates	Email Se	ettings	Version Display
Specification Templates Works	space <	Templates Su	mmary
Specification Template	s	#	Template Name
Default			
TechPubs			
🔺 📄 DocReq		1	<u>Default</u>
SRSRequireme	nts		
	reate Artifact elete Artifact		TechPubs
	dit Artifact		

2. Click Edit Artifact.

The Artifact View tab appears in editable mode.

Managing Artifacts

Artifact View	Form Designer	
		Le X
Artifact Name*		Tree Node Policy
SRSRequirements		Display Always 🗸
Artifact Description		Support Documents Upload
🔉 <u>А</u> <u>н</u> в <i>г</i> <u>и</u>	토르크르 분분별별	OFF
,		Enable Description
		OFF
		Mail Comments
		•
Created By		
Administrator		
Created Date		
08-12-2020 07:44:47		
Last Modified By		
Administrator		
Last Modified Date		
08-12-2020 07:44:47		

- 3. Edit the required information.
- 4. Click 💾.

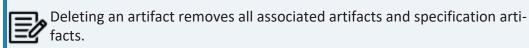
The updated information is saved.

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.



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.

•	Templates	Email Settings		Version Display	
Specificati	on Templates Workspa	ace <	٠	Artifacts Details	
Specification Templates			Artifacts Listing		
→ ■ D	-		#	Artifact Name	
	echPubs				
	DocReq				
			1	DocReg	

2. Use the following options:

Export Template

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

Edit Template

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

Delete Template

Use this option to delete the template.

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**

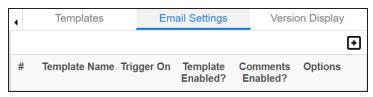
The actions can be Add, Delete, Edit, Version, or Copy. For each object-action combination, you can configure a custom email template.

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 <u>Configuring Email Settings</u> 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.



3. Click 🖸.

The Email Template page appears.

mail Template				
Template Name *	Enable Email	Email Content	B / ∐ ≣ ≅ ≣ ≣	
Trigger On Specification V		Hi, This is a system as	nerated email notification.	
Add Delete Edit Version Copy		, ,	d: @ACTIONTYPE@ @ACTI	ON@
Requirements Manager Specification Status - DO NOT REPLY		Specification Details		
		Name	@SpecificationName@	
		ld	@SpecificationId@	
Enable Comments		Version	@Version@	
		Project Name	@ProjectName@	
Comments		Subject Name	@SubjectName@	
₩ <u>A</u> <u>H</u> B <i>I</i> <u>U</u> ≡ ≡ ≡ ≡ ± ±	∃ *≣ *≣ �	Created By	@CreatedBy@	
Comments:	*	Created Date	@CreatedDate@	
@comments@		Modified By	@ModifiedBy@	
	-	Madified 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	Specifies the name of the template.			
Name	For example, Specification Email Template.			
Trigger On	Specifies whether the email template is for Specification, Artifact, or Spe- cification 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.			
Subject	Specifies the subject of the email notification.			

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

5. Click 💾.

The template is created and saved under Email Settings.

4	Templates	Email Settings	Version Displ	ау				•
								+
#	Template Name	Trigger On	Template Enabled?	Comments Enabled?		Opt	ions	
1	Template_Name	Artifact	~	~	0	/	×	Ð

Use the following options to manage email templates:

Preview Email Message (10)

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

Edit (🖍)

You can update the fields in an email template.

Delete (🗙)

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.

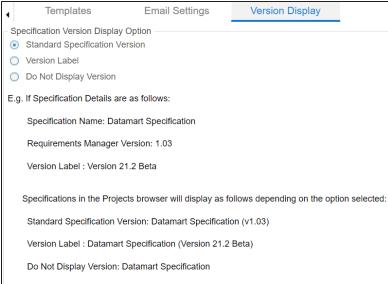
For example, Data_Mart (erwin_Mart) where Data_Mart is the specification name and erwin_Mart is the Version Label.

Version Label is specified while <u>creating specifications</u>. 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.



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**.

Configuring Business Glossary Manager and Data Marketplace

On the Business Glossary Manager & Data Marketplace Settings page, you can set up the following:

- 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 and Data Marketplace. For more information, refer to the <u>Adding Asset</u> <u>Types</u> topic.

To access Business Glossary Manager & Data Marketplace settings, go to **Application Menu** > **Settings** > **Business Glossary Manager & Data Marketplace**. The Business Glossary Manager & Data Marketplace Settings page appears.

ASSET TYPES ASSOCIATIONS & RELATIONS	ONSHIPS OTHER CON	FIGURATIONS		
Business Assets 🗴 🗘	Asset Details Ca	talog Business Ter	m	
BT Business Terms	Name*	Business Terms		<i>b</i> *
Test	Title*	Business Term		
BP Business Policies	Description	Business Terms Descrip	tion	
BP Business Processes				
CR Compliance Reports				Ŧ
BR Business Rules	Color Documents Required	#1C5FAB	FG Color	#FFFFFF
ED erwin DM NSM	Enable Asset			
DM NSM Files	Enable Definition Enable Sensitivity Fields	Y Y		
DA DS Agreements	Enable Scoring	⊻ \$\$ S \$*		
-	Enable Certification Enable Dashboard	⊻ \$		
Tags	Display Order	1.0		
sg Stewardship Goals Add New	Image			

Configuring Business Glossary Manager and Data Marketplace

Configuring Asset Types

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

By default, the business assets configuration page appears. To configure and manage marketplace assets, in the Business Assets pane, click ^(*) and then select **Data Marketplace**. The asset type switches to Data Marketplace.



The following steps help you to configure business assets. Similarly, you can configure marketplace assets.

To configure asset types, follow these steps:

 Go to Application Menu > Settings > Business Glossary Manager & Data Marketplace.

The Business Glossary Manager & Data Marketplace Settings page appears. By default, the Asset Types settings for business assets open.

Configuring Asset Types

ASSET TYPES ASSOCIATIONS & RELA	TIONSHIPS OTHER CON	NFIGURATIONS			
Business Assets 🔅 <	Asset Details Ca	talog Business Term		Þ	0
BT Business Terms	Name*	Business Terms			,
Test	Title*	Business Term			
BP Business Policies	Description	Business Terms Description			•
BP Business Processes					
CR Compliance Reports					
BR Business Rules	Color Documents Required	#1C5FAB	FG Color	#FFFFF	
ED erwin DM NSM	Enable Asset	Y Y			
DM NSM Files	Enable Definition Enable Sensitivity Fields				
DA DS Agreements	Enable Scoring	⊻ \$\$ ⊻ \$\$			
Ilssues	Enable Dashboard	✓ ✓			
Tags	Display Order Image	1.0			
SG Stewardship Goals Add New					

2. In the Business Assets pane, select an asset type.

The corresponding settings appear in the right pane. These settings are grouped into 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 <u>Configuring</u> <u>Asset Details</u> 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 <u>Configuring</u> <u>Catalog Form</u> topic.

• **<Asset Name>**: Use this tab to set up a form for additional information of the asset. For more information, refer to the <u>Configuring Asset Form</u> 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.

The following steps walk you through configuring asset details for business assets. Similarly, you can configure asset details for marketplace assets.

To configure asset details, follow these steps:

Asset Details Car	talog	Business 1	erm			_
						6
Name*	Business	Terms				
Title*	Business	Term				
Description	Business	Terms Desc	ription			
Color	#1C5FAB		FG C	olor	#FFFFFF	
Documents Required						
Enable Asset						
Enable Definition	\checkmark					
Enable Sensitivity Fields						
Enable Scoring		3 -				
Enable Certification		2				
Enable Dashboard						
Display Order	1.0					
Image						

2. Edit the settings appropriately.



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

Configuring Asset Details

	Name
	Title
	Documents Required
<u>=</u> 2	Enable Asset
	Enable Definition
	Image

Refer to the following table for field descriptions:

Field Name	Description			
Name	Specifies the name of the asset type.			
Marrie	For example, Business Terms.			
Title	Specifies the name of the <asset name=""> tab.</asset>			
THE	For example, Business Term.			
	Specifies the description about the asset type.			
Description	For example: A business term defines industry concepts in simple busi- ness language.			
Color	Select a color to associate it with the asset. In the Business Glossary			
COIOI	Manager, the asset type is displayed in the selected color.			
Documents	Specifies whether documents can be attached to the asset type.			
Required				
Enable	Specifies whether the asset type is enabled in the Business Glossary			
Asset	Manager.			
Enable	Specifies whether the Definition field for the asset type is enabled in the			
Definition	Business Glossary Manager.			
	Specifies whether the sensitivity fields for the asset type are enabled in			
	the Business Glossary Manager.			
Enable Sens- itivity Fields	There are three sensitivity fields:			
,	Sensitive Data Indicator(SDI): Specifies whether the asset is sens-			
	itive.			

Configuring Asset Details

Field Name	Description
	Sensitive Data Indicator (SDI) Classification: Specifies the SDI clas- sification of the asset. For example, PHI.
	Sensitive Data Indicator (SDI) Description: Specifies the descrip- tion of the SDI classification. For example: Protected Health Information.
Enable Scor-	Specifies whether the scoring is enabled in the Business Glossary Man-
ing	ager. To configure scoring, click 🎕 . For more information, refer to the
ы. В	Configuring Data Value Score topic.
Enable Cer-	Specifies whether the certification is enabled in the Business Glossary
tification	Manager. To configure certification, click 🕸 . For more information,
lineation	refer to the Configuring Maturity Level Certification topic.
Enable Dash-	Specifies whether the dashboard is enabled in the Business Glossary
board	Manager.
Display	Specifies the number at which the asset type is available in Business
Order	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 💾.

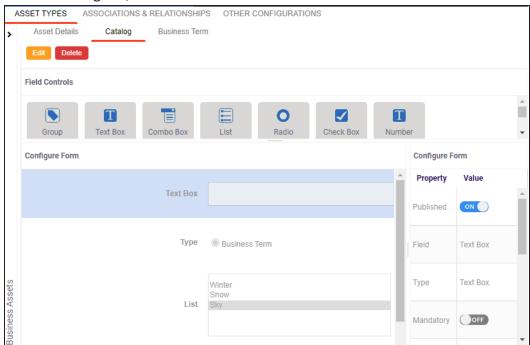
The changes you made are available on the asset type creation page in the Business Glossary Manager. For more information, refer to the <u>Business Glossary Manager</u> topic.

To discard your changes, click 🔀.

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.

The following steps walk you through configuring catalog forms for business assets. Similarly, you can configure catalog forms for marketplace assets.

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



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

The Catalog 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.
- 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.

A	SSET TYPES	ASSOCIATIONS &	RELATIONSHIPS	OTHER C	ONFIGUE	RATION	IS		
>	Asset Details Save Can		Business Term						
	Field Controls								
	Group	Text Box	Combo Box	E List	Radie	D	Check Box	T Number	•
	Configure Form					Config	gure Form		
		Text Box				Prop Publis	-	Value	•
		Туре	Business Terr	n		Field		Туре	
			Winter Snow			Туре		Radio	l
ets		List	Sky			Config	jure Values	Configure	
Business Assets						Descri	ption		•
Busi								field cell to update the me to update its prope	Ť

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.			
Field	Set the element label.			

Property	Description
Туро	Select the element type. By default, it is set to the element that you
Туре	added. However, you can change the type using this property.
	Some elements depend on the values of other elements on the form.
Dependencies	Select the elements on which your element depends. This property is
	available for List, Radio, Boolean, and Date Picker elements.
Configure Val	Click to configure the possible values available in an element. You can
Configure Val-	add custom values or select the data available in your environment.
ues	For example, the list available in a Combo Box.
Mandatory	Select whether documents can be attached to the asset type.
	Define a regular expression that must be fulfilled for the text entered
Regular	in the text box.
Expression	For example, a password text box should be validated for the correct
LXPIESSION	password format. In that case, the regular expression would define the
	password criteria.
Description	Enter the description of the element.
Visible	Switch Visible in Form to ON to make the field visible on the form.
in Form	
Visible in Grid	Switch Visible in Grid to ON to make the field visible in the grid.
	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
Order	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 catalog or category creation page in the Business Glossary Manager. For more information on creating catalogs, refer to the <u>Creating Catalogs</u> topic.

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

Configure Form	
Catalog Name	
Catalog Type	Select an option
Role	Data Steward 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.

Configure Form		Configure Form			
		Property	Value		
Catalog Name		Published		•	
Catalog Type	Select an option	Field	Catalog Type		
	Data Steward ETL Developer	Туре	Combo Box		
Role		Dependencies	Type or click here		
		Configure Values	Configure	4	

2. Click Configure.

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



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

list.

Combo Box Options	_ □ ×
Add Save Delete	Import Excel
Text	Value
Business	Business
Data	Data
Policies	Policies
Configure Form	
Catalog Name	
Catalog Type	Select an option Select an option
Role	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, and marketplace assets (datasets) in the Data Marketplace module. 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.

The following steps walk you through configuring asset forms for business assets. Similarly, you can configure asset forms for marketplace assets.

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.

Asset Details	Catalog	Business Te	rm		
Save	Delete				
Field Controls					
Group	Text Box	Combo Box	List	Radio	Check Box
	_				
Number	Boolean	Date Picker	Category	Rich Editor	
Configure 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.
- 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.									
Asset Details	Catalog	Business Term	•						
Save Cancel	Delete								
Field Controls									
Group	Text Box Co	T ombo Box	List	O Radio	Check Box	T Number	Boolean	Date Picker	Category
Configure Form					Configure Form				
		0			Property			Value	
	Radio	○ Solid○ Outline			Published				
	Options	Winter Summer Outline All of the above			Field			Radio	
		All of the above			Туре			Radio	
	Available				Configure Values			Configu	ire
					Description				
					Note [*] : 1.Double click 2. Select the f	on the field cell to u field name to update		ne	

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.
Field	Set the element label.
Туре	Select the element type. By default, it is set to the element that you

Configuring Asset Form

Property	Description					
	added. However, you can change the type using this property.					
	Some elements depend on the values of other elements on the form.					
Dependencies	Select the elements on which your element depends. This property is					
Dependencies	available for List, Radio, Boolean, and Date Picker elements. Parent ele-					
	ments must be placed first in the form.					
	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.					
	Use the following options:					
Configure Val-	• Default Connector: Use this option to enter option values manu-					
ues	ally or using an XLSX file.					
	• Reference Data Manager: Use this option to pull option values					
	from reference tables in the Reference Data Manager.					
Mandatory	Select whether documents can be attached to the asset type.					
	Define a regular expression that must be fulfilled for the text entered					
Decules	in the text box.					
Regular Expression	For example, a password text box should be validated for the correct					
LXPI E33IOII	password format. In that case, the regular expression would define the					
	password criteria.					
Description	Enter the description of the element.					
Visible	Switch Visible in Form to ON to make the field visible on the form.					
in Form						
Visible in Grid	Switch Visible in Grid to ON to make the field visible in the grid.					
	Switch Use in Discover Assets to ON to use the field as a filter in the					
	Discover Assets module.					
Use in Dis- cover Assets	Ensure the following:					
	· Filter feature supports field types such drop-down, list, check-					

Configuring Asset Form

Property	Description
	 Switch the Include Extended Properties option ON on the <u>Discover Asset Settings</u> page. Schedule a <u>synchronization job or manually synchronize</u> the asset before you can filter assets on the Discover Assets module.
	Specifies the order of the field on the Extended Properties tab.
Order	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 <u>Business</u> <u>Glossary Manager</u> topic.

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

Configuring Asset Form

Configure Form	
Radio	○ Solid ○ Outline
Options	Winter Summer Outline All of the above
Available	
Preference	Select an option

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

1. Select the Preference element.

Its properties appear in the Properties pane.

Configure Form		Configure Form			
Radio	O Solid O Outline	Property Published	Value		
Options	Winter Summer Outline All of the above	Field	Preference		
		Туре	Combo Box		
Available		Configure Values	Configure		
Preference	Select an option	Mandatory	OFF		

2. Click Configure.

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

Configuring Asset Form

combo box list.									
Combo	□ ×								
Add	Save	Delete	Import Excel						
Text			Value						

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.

Combo Box Options	□ × □
Add Save Delete	Import Excel
Text	Value
Business	Business
Official	Official
Personal	Personal

6. Click Save.

The list you added in Step 5 appears in the Preference combo box. The following

Configuring Asset Form

Configure Form	
Radio	○ Solid ○ Outline
Options	Winter Summer Outline All of the above
Available	
Preference	Select an option
Combo Box	Business Official Personal

image shows the Preference combo box with the list.

Based on your organization's requirements, you can create custom asset types to supplement the default asset types available in Business Glossary Manager (Business Term, Business Policy, and Business Rule), and Data Marketplace (Datasets, Insights, and AI Models).

The following steps walk you through adding a business asset to Business Glossary Manager. Similarly, you can create custom marketplace assets and these assets will be available in the Data Marketplace.

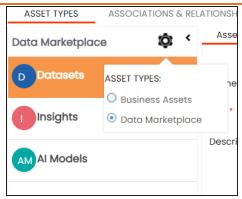
To add custom asset types, follow these steps:

 Go to Application Menu > Settings > Business Glossary Manager & Data Marketplace.

The Business Glossary Manager & Data Marketplace Settings page appears. By default, it opens the ASSET TYPES settings for Business Assets.

ASSET TYPES ASSOCIATIONS & RELA	TIONSHIPS OTHER CON	NFIGURATIONS		
Business Assets 🔅 <	Asset Details Ca	talog Business Term		Ø
BT Business Terms	Name*	Business Terms		
Test	Title *	Business Term		
BP Business Policies	Description	Business Terms Description		Â
BP Business Processes				
CR Compliance Reports				•
BR Business Rules	Color Documents Required	#1C5FAB	FG Color	#FFFFF
ED erwin DM NSM	Enable Asset	<u> </u>		
DN DM NSM Files	Enable Definition Enable Sensitivity Fields			
DA DS Agreements	Enable Scoring Enable Certification	⊠ \$\$ ⊠ \$\$		
Issues	Enable Dashboard	→		
ταgs	Display Order Image	1.0		
SG Stewardship Goals Add New				

On the Business Assets tab, click to choose an asset type from the list, and the assets are created in the respective module. For example, based on the screenshot below, new assets will be created and added to Data Marketplace Module.



2. In the Business Assets pane, click Add New.

The New Asset Type page appears.

New Asset Type														-		×
													=	╘	×	
Name*																
Title*																
Description	T	<u>A</u>	H	в	I	U	≣	≣ :				I≡	•≣	•≣	*	
																•
Color	#F6C	65B					F	3 Colo	r	#FFF	FFF					
Documents Required																
Enable																
Enable Definition	\checkmark															
Enable Sensitivity Fields																
Enable Scoring		ø														
Enable Certification		ø														
Enable Dashboard																
Display Order																
Image																

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

Field Name	Description					
	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.</asset>					
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.					
Enable	Select whether the asset type is enabled in the Business Glossary Man- ager.					
Enable	Select whether to enable the Definition field for the asset type in the					
Definition	Business Glossary Manager.					
	Specifies whether the sensitivity fields for the asset type are enabled in					
	the Business Glossary Manager.					
	There are three sensitivity fields:					
Enable Sens-	• Sensitive Data Indicator (SDI): Specifies whether the asset is sens- itive.					
itivity Fields	• Sensitive Data Indicator (SDI) Classification: Specifies the SDI clas- sification of the asset. For example, PHI.					
	Sensitive Data Indicator (SDI) Description: Specifies the descrip- tion of the SDI classification. For example: Protected Health Information.					
Enable Scor-	Specifies whether the scoring is enabled in the Business Glossary Man-					
ing	ager.					
	Specifies whether the certification is enabled in the Business Glossary					
tification	Manager.					
	Specifies whether the dashboard is enabled in the Business Glossary					
board	Manager.					
Display	Enter the number at which the asset type is available in Business Gloss -					

Field Name	Description					
Order	ary Manager > Browser pane.					
lillage	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 <u>Business Glossary Manager</u> topic. Also, refer to <u>Data Marketplace</u> topic to learn more the accessing your new assets.

Configuring erwin DM NSM Asset

Using <u>DM Connect for DI</u>, 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:

- 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.

ASSET TYPES ASSOCIATIONS & RELATIONSHIPS OTHER CONFIGURATIONS Asset Details Catalog DM NSM Asset ۲ **Business Assets** V 🗎 BT Business Terms Name* erwin DM NSM DM NSM Asset Title^{*} **Business Policies** BP To Share and reuse model objects within an organization, erwin DM uses Naming Description Standards for logical and physical objects in the model so that everyone in your **Business Rules** organization uses the names consistently and correctly. The entries in this list are used to expand the abbreviated (cryptic) table/column names to Expanded Logical BR Name in Metadata Manager. ED erwin DM NSM **DM NSM Files** #F6C65B Color **DS** Agreements Documents Required Enable Asset Issues Enable Definition \checkmark Tag Enable Sensitivity Fields

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.

BUSINESS ASSETS <	CATALOG VIEW				
BT Business Terms	Workspace <	DM NSM ASSET SUMMARY			
Business lerms	erwin DM NSM	AII # A B C D E F G H			
BP Business Policies	eMovies (5)	Compact View Grid View			
		Search			
BR Business Rules	▶ TruistABBV (245)	Search			
ED erwin DM NSM		TruistABBV			
		$(1)^{1}$			
SG Stewardship Goals		No Description available			
		1			

You can configure associations and relationships between assets in your organization. Associate business and marketplace assets with columns, environments, and tables to define your business glossary and data marketplace better. For each asset type, you can configure the objects available for association and their forward and reverse relationships.

The following steps walks you through adding associations and relationships to business terms. Similarly, you can configure them for marketplace assets.

To add associations, follow these steps:

1. Go to Application Menu > Settings > Business Glossary Manager & Data Marketplace.

The Business Glossary Manager & Data Marketplace Settings page appears. By default, it opens the Asset Types settings.

2. Go to the Associations & Relationships tab.

ASS	SET TYPES ASSO	YPES ASSOCIATIONS & RELATIONSHIPS		OTHER CO	ONFIGURATIONS					
							50	Đ		
Sumr	Summary of Relationships									
#	Source Asset Type	Target Asset Type	Forward Relations		Reverse Relationship	Description	Options			
]			
1	Business Terms	Business Terms					🗉 🖍 + 🗿 🔋	Ð		
2	Business Terms	Business Policies					🗉 🖍 + 🗿 📋	Ð		
3	Business Terms	Column					🗏 🖍 + 🗿 📋	Ð		
4	Business Terms	Table					🗏 🖍 + 🗿 📋	Ð		
5	Business Terms	Environment					🗏 🖍 + 🗿 🔋	Ð		

3. Click 🛨.

The Add Association page appears.

Add Association	_ ×
Save	Cancel
Source Asset Type*	
Select Source Asset Type	*
Target Asset Type [*]	
Select Target Asset Type	~
Description	
	'≣ �
	*
	*

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	Select an asset type for which you want to create an association.
Туре	select an asset type for which you want to create an association.
Target Asset	Select an asset type that you want to associate to the source asset
Туре	type.
Description	Enter a description of the association.

5. Click Save.

The association is added to the list of relationships.

AS	SET TYPES ASS	OCIATIONS & RELATION	NSHIPS OTHE	R CONFIGURATIONS		
						8 +
Sum	mary of Relations	lips				
#	Source Asset Type	Target Asset Type	Forward Relationship	Reverse Relationship	Description	Options
1	Business Term	s Business Terms				∎ ∕ + ⊙ î ·9 ⁴
2	Business Term	s Business Policies				■/+④ 章 ④
3	Business Term	s Column				■ / + ⊙ î · ⊙
4	Business Term	s Table				■/+④ ↑ •9
5	Business Term	s Environment				E 🖍 + 🛛 Î 🕠

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:

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

Forward Relationship*

Reverse Relationship*

Description

Display Type

Single

Display Color

#5C5D61

Configuring Associations and Relationships

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 Rela- tionship	Enter a name of the relationship of source asset type with target asset type.
	For example, is associated with.
Reverse Rela- tionship	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.

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.

Summ	Summary of Relationships						
#		Source Asset Type	Target Asset Type	Forward Relationship	Reverse Relationship	Description	Options
]
	1	Business Terms	Business Terms				∎⁄+⊚î ∿
	2	A Business Terms	Business Policies				∎⁄+⊚î ∿
				is Governed By	Governs		11 9

Configuring Data Value Score

You can configure data value scoring for business assets such as business terms, business rules, and business policies, and data marketplace assets such as datasets, AI models, and data products.

This topic walks you through the steps of configuring data value scoring for the selected asset type. For example, Business Terms.

To enable and configure data value score, follow these steps:

Asset Details Cat	talog Business Term
Asset Details	
Name*	Business Terms
Title*	Business Term
Description	Business Terms Description
Color	#IC5FAB FG Color #FFFFFF
Documents Required	
Enable Asset	
Enable Definition	
Enable Sensitivity Fields	
Enable Scoring	□
Enable Certification	✓
Enable Dashboard	
Display Order	1.0
Image	

1. On the Asset Details tab, click \square .

2. Select the Enable Scoring checkbox.

The scoring is enabled.

3. To configure scoring, click 🍄.

The Configure Scoring pane appears.

	Score	Parameters o	ind weigh	ntages	
DQ Score 20	%	User Ratings 10	%	Asset Completeness	%
Timeliness 5	%	Lifecycle 5	%	Scarcity 5	%
Popularity 5	%	Relevance 15	%	Datasource 15	%
		Score Classi	ification		
key GOLD			value 100		%
key SILVER			value 70		%
key BRONZE			value 30		%

4. Enter or select appropriate values in the fields. Fields marked with a red asterisk are mandatory.

Refer to the following table for field descriptions.

Field Name	Description	
Seere Name	Specifies the name of the score.	
Score Name	For example, Business Term Score.	
DQ Score	Specifies the percentage based on the asset's Data Quality Score	
DQ SCOLE	which is derived from data profiling results. For example, 20%.	
User Ratings Specifies the percentage based on user ratings in the Discover Asset		

Configuring Data Value Score

Field Name	Description				
	module. For example, 10%.				
Asset Com- pleteness	Specifies the percentage based on the metadata completeness of assets. For example, 20%.				
Timeliness	Specifies the percentage based on how recent asset's data is. For example, 5%.				
Lifecycle	Specifies the percentage based on asset's lifecycle stage. For example, 5%.				
Scarcity	Specifies the percentage based on how unique an asset is within the data catalog. For example, 5%.				
Popularity	Specifies the percentage based on the number of views an asset has received. For example, 5%.				
Relevance	pecifies the percentage based on an asset's association with one or nore Business Processes. For example, 15%.				
Datasource	Specifies the percentage based on an asset's associations with envir- onments, or tables or columns of environments that have the Author- ized Datasource option switched on in the Metadata Manager module. For example, 15%.				
	Specifies the percentage ranges for each classification level				
	• Bronze : Indicates lowest value assets. For example, when the value is 30, the percentage score from 0 to 30 is configured as Bronze.				
Keys	• Silver : Indicates mid-value assets. For example, when the value is 70, the percentage score from 31 to 70 is configured as Silver.				
	• Gold : Indicates highest value assets. For example, when the value is 100, the percentage score from 71 to 100 is configured as Gold.				
Enable Scor- ing as	 Specifies the scoring mode Key: Displays score using the key classification. For example, Gold, Silver, and Bronze 				

Configuring Data Value Score

Field Name	Description
	Value: Displays the numerical score
	Both: Displays both key and score



The sum of the weights must equal 100. To exclude a parameter from scoring, set its weight to 0%.

- 5. Click 🗸 .
- 6. Click

The data value score is available in the Business Glossary Manager, Data Marketplace, and Discover Assets modules.

To discard your changes, click 🔀.

Additionally, on the <Asset_type> tab, you can include or exclude the Timeliness, Lifecycle, and Scarcity parameters by switching the Published option to ON or OFF in the Configure form.

Asset Details	Catalog	Business Term					
Edit Delete							
Field Controls							
Group	Text Box	Combo Box List	O Radio	Check		Boolean Date Picker	
Configure Form					Configure Form		
					Property	Value	
	Timeliness	Select an option		~	Published		
	Lifecycle	Select an option		~	Field	Include Sensitive Informatio	'n
	Scarcity	0			Туре	Label	
	Text Box				Description		

You can configure maturity level certification for business assets such as business terms, business rules, and business policies, and data marketplace assets such as datasets, AI models, and data products.

This topic walks you through the steps of configuring maturity level certification for a selected asset type. For example, AI Models.

To enable and configure the maturity level certification, follow these steps:

Asset Details Co	atalog	Al Model				
					<i>L</i>	<u>الم</u>
Name*	AI Models					
Title*	Al Model					
Description						
						•
Color	#00A9A2		FG Color	#FFFFFF		
Documents Required						
Enable Asset						
Enable Definition						
Enable Sensitivity Fields						
Enable Scoring	M 🔯	ł				
Enable Certification		ŧ				
Enable Dashboard						
Display Order	4.0					
Image	\→∕					
	<u></u>					

1. On the Asset Details tab, click

2. Select the Enable Certification checkbox.

The certification is enabled.

3. To configure certification, click 🏟 .

The Maturity Level Configuration pane appears.

Maturity Level Configure	~	×	
Lev	els Configuration		
Model			
Catalog			
Curate			
Govern			
Score			
Observe			
Shop			
Lev	vel Classification		
^{key} Expert	value 100		%
^{key} Intermediate	value 70		%
^{key} Beginner	value 30		%

4. Switch the options on or off to select key criteria for calculating the maturity level of the selected asset type based on your requirements. Refer to the following table for field descriptions.

Field Name	Description
Model	Validates whether a data model is associated with the asset
Catalog	Validates whether source datasets have been identified
Curate	Validates whether metadata fields, such as Definition, Business Pur- pose, and Owner, are populated
Govern	Validates whether Business Rules and Business Policies are associated with the asset
Score	Validates whether datasets have been evaluated and scored for data quality
Observe	Validates whether lineages exist, and data has been profiled for data quality
Shop	Validates whether assets have passed through the approval workflow
	 Specifies the percentage ranges for each classification level Beginner: Indicates the Beginner Level classification, representing the lowest value assets. For example, when the value is 30, the percentage score from 0 to 30 is configured as Beginner.
Level Clas- sification	• Intermediate: Indicates the Intermediate level classification, representing moderate value assets. For example, when the value is 70, the percentage score from 31 to 70 is configured as Intermediate.
	• Expert : Indicates the Expert level classification, representing the highest value assets. For example, when the value is 100, the percentage score from 71 to 100 is configured as Expert.

You can rename the keys and modify the values as required for Level Classification.

- 5. Click 🗸 .
- 6. Click

The Maturity Level is available in the Business Glossary Manager, Data Marketplace, and Discover Assets modules.

To discard your changes, click 🔀.

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 & Data Marketplace.

The Business Glossary Manager & Data Marketplace Settings page appears. By default, it opens the Asset Types settings.

2. Go to the **Other Configurations** tab.

ASSET TYPES	ASSOCIATIONS & RELATIONSHIP	S OTHER CONFIGURATIONS		
Enable usage	on Business Term	Enable usage on Business Term		Enable usage on Business Term
Classification		Data Collection Type		Meaning Category Type
Reference Derived Transactional Operational	۲	Report Report Section Screen Dashboard Extract API	٠	Conceptual Logical Physical
Data Object Type				
Enable usage	on Business Term	Enable usage on Business Rule		Dashboard Visibility
		Criticality		🗹 Business Term
Business Data Eler Data Collection Physical Data Eler	Ð	High Low Medium	€	 ☑ Business Policy ☑ Business Rule

- 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.

Classification Options					
⊕ 💾					
Кеу	Value	Publish			
Master	Master	OFF	Î		
Reference	Reference	ON			
Derived	Derived	ON			
Transactional	Transactional	ON			
Operational	Operational		.		

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.

	erwin Data Intelligence		Plugin \$	Plugin Settings			θ
	Plugins						+
Plu	gin Details						÷
	#	Icon		Title	URL		
	1	₹Ç.	Erwin	Training	https://erwin.com/servi	ces/erw	<u>/in-ac;</u>

2. To add plugins, click 🖸.

Add Plugin		_ ×
		Ľ×
Plugin Visibility	Public	~
Plugin Title*		
Plugin URL*		
Plugin Icon	Choose File No file chosen Note: Best result for 32 x 32 size	
Plugin Description		

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

Field Name Description			
	Select appropriate plugin visibility.		
Plugin Visibility	Choose Private to restrict its visibility to yourself.		

Configuring Plugins

Field Name	Description	
	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.

Plugins Plugin Details							
∕isibility	Created By	Created Date Time	Last Modified By	Last Modified Date Time		Option	s
Public	Administrator	2020-12-07 07:45:47.63	Administrator	2020-12-07 07:47:56.923	/	-8	•
•						Þ	•

Use the following options:

Edit

To edit plugin details, use 🖍.

Delete

To delete plugins, use 🔯 .

Setting Miscellaneous Configurations

On the Miscellaneous Configurations 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.
- <u>Data Profiling Configuration</u>: Under this, you can configure erwin Data Quality instance and schedule erwin Data Quality jobs.
- 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.
- <u>Workflow Settings</u>: 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.
- <u>Version Retention</u>: It enables you to retain archive versions of mappings and environments.
- <u>License Renewal Reminder</u>: 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.
- Data Lineage Settings: Under this, you can sync mapping records with lineage tables in case of any disruption.

Setting Miscellaneous Configurations

- <u>ALM Configuration</u>: 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.
- Security Setting: Under this, you can configure to be notified with a secure exit warning message.
- Business Entity Types: Under this, you can configure background color, text color, and icon of business entities.
- <u>IDR Configuration</u>: Under this, you can configure connection details and schedule jobs between erwin DI Cloud and on-premises instance.

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

The Miscellaneous Configurations page appears:

	erwin Data Intelligence		Miscellaneou	s Configurations	0	B
- ۱	Email Settings Notifications	Sensitivity	/ Classification	DQLabs Configuration	Scheduled Jobs	Asset Settings
						Ø 🕅
۲						
	Admin Email Id*		Admin En	nail SMTP Host*		
			Admin En	nail Use SSL	Note:default port - 4	65
			Admin En	nail Use TLS	Note:default port - 5	87
	Enable Authentication*		Admin En	nail SMTP Port*	587	
0	Use sendmail Command 👔					
0	Use mailx Command 👔					
0	Use Custom Command 👔					

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 Configurations.

The Email Settings tab opens.

•	Email Settings Notificat	ions Sensitivity Classification	Metadata Asset Settings	Workflow Settings	Language Settings
0	Use SMTP Settings				Ø 🔀
۲					
	Admin Email Id*		Admin Email SMTP Host*		
			Admin Email Use SSL	Note:defa	ult port - 465
			Admin Email Use TLS	Note:defa	ult port - 587
	Enable Authentication*		Admin Email SMTP Port*	587	
0	Use sendmail Command	Configure			
0	Use mailx Command	Configure			
0	Use Custom Command	Configure			

- 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 outbound emails.

To configure the SMTP Settings, follow these steps:

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

Use sendmail Command

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:

SendMail Co	SendMail Command Configuration _				
	Save Cance				
Shell Type	bash Option -C				
Code	<pre>1 function execute() { 2 importPackage(java.io); 3 importPackage(org.apache.commons.lang); 4 importPackage(org.apache.commons.lang); 5 importPackage(java.util); 6 var sb = new StringBuffer(); 7 if(ec.getSubject() !== "" && ec.getSubject() !== null && ec.getEmailContent() !== "" && ec.getSubject()); 8 b.append("\n"+ec.getEmailContent()+"\""); 9 } 10 else if(ec.getSubject() !== "" && ec.getSubject() !== null }{ 11 sb.append("\end{tabular}+ec.getSubject() !== null }{ 12 else if(ec.getEmailContent() !== "" && ec.getEmailContent() !== null }{ 13 else if(ec.getEmailContent() !== "" && ec.getEmailContent() !== null){ 14 sb.append("echo -e "+"\"Subject:"+ec.getSubject()+"\""); 15 } 16 sb.append(" sendmail "); 17 if(ec.getToEmailS().size() >0) { 18 sb.append(" "+StringUtils.join(ec.toEmails.toArray(), ",")); 19 } 20 return sb.toString(); 21 } 22 execute(); </pre>				

- 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:

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

The MailX Command Configuration page appears.

				Save	Cancel
Shell Type	bash	Option	-c		
2 impor 3 impor 4 functi 5 vars 6 if(ec 7 sb.(8 } 9 sb.a 10 if(ec 11 sb.(12 } 13 if(ec 14 sb.(15 } 16 if(ec 17 var 18 sb.(19 } 20 if(ec 21 sb.(22 }	ion execute(){ ib = new StringBuffer .getEmailContent() append("echo"+"\"" ppend("mailx"); .getSubject() !== "" { append(" -s "+"\""+er .getCCEmails().size(append(" -c "+String .getEmailAttachments append(" -a "+email .getToEmails().size() append(" "+StringUtil m sb.toString();	che.commons.lang); (); I== "" && ec.getEmailContent && ec.getSubject() !== c.getSubject()+"\"");) >0) { Utils.join(ec.getCCEmailAttachm Attachments.get(0).gr	()+"\""+"^ "); = null){ ails().toArray(), ",")); nents(); etFilePath());		

- 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:

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

The Custom Command Configuration page appears.

Custom Com	mand Configuration	_ 🗆 ×
		Save Cancel
Shell Type	Option	
Code	<pre>1 importPackage(java.io); 2 importPackage(orm.ads.api.beans.email); 3 importPackage(org.apache.commons.lang); 4 function execute(){ 5 var sb = new StringBuffer(); 6 sb.append(""); 7 return sb.toString(); 8 } 9 execute();]</pre>	

- 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 _ 🗆 X		
		Send Cancel
From*	abc@abc.com	
То*	abc@abc.com	
Cc		
	Note* : Please provide CC List with comma(,) separated values	
Subject		
Email Body		
		Â
		-
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 noti- fications.
То	Type a test email ID to which you want to send email.
СС	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 <u>administrator's email ID</u> when bulk sensitivity update is complete.

To configure sensitivity update notifications, follow these steps:

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

The following page appears.

Email Settings	Notifications	Sensitivity Classification	Metadata Asset Settings
		-	
$_{\Box}$ Sensitive Date	a Indicator ——		
🗹 Email			
Email Subject			
Sensitive Data	Indicator Email Sub	ject - DO NOT REPLY	
Email Body			
Hi,			
This is a syste	m generated email	notification.	
@execution!	Message@		

- 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.

Configuring Sensitivity Update Notifications

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
- Data Marketplace assets

To configure sensitive data indicator classifications, follow these steps:

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

The Sensitive data indicator Classification page appears.

•	Email Settings	Notifications	Sensitivity Classification	DQLab Configur	ation	Scheduled Jobs			
Se	Sensitive data indicator Classification								
#	SDI Class		SDI Class Descrip	otion	Color	Created By			
1	Confidential		Confidential			System			
2	PHI		Protected Health Inf	ormation		Administrator			
3	PII		Personally Identifiat	le Information		System			
4	Public		Public			System			
5	Restricted		Restricted			System			

Configuring Sensitivity Classifications

2. Click 🛨.

The Add Sensitive Data Indicator Classification page appears.

Add Sensitive Data Indicator Classificatio	n	_ ×
	Li 🗙	
Name*		
Description		
SDI Classification Color		

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

For example:

- Name Secret
- Description Protected Mark Information.
- SDI Classification Color #03a0ce
- 4. Click 💾.

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

Configuring Sensitivity Classifications

•	Email Settings	Notifications	Sensitivity Classification	DQLabs Configurati	ion	Scheduled Jobs
Se	nsitive data indi	cator Classificatio	n			
#	SDI Class		SDI Class Descrip	tion	Color	Created By
1	Confidential		Confidential			System
2	PHI		Protected Health In	formation		Administrator
3	PII		Personally Identifia	ble Information		System
4	Public		Public			System
5	Restricted		Restricted			System
6	Secret		Protected Mark Inf	ormation		System

Use the following options:

Edit 🖍)

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

Delete (X)

Use this option to delete the SDI classification.

Configuring Data Profiling

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

Configuring erwin Data Quality in erwin DI requires Client ID and Client Secret details available in your erwin Data Quality instance. To get configuration details from erwin Data Quality instance, refer to the <u>Accessing erwin Data Qualitys Configuration Details</u> section.

erwin Data Quality now supports Single Sign-On (SSO). For more information, refer to <u>erwin</u> Data Quality SSO guide.

To configure erwin Data Quality, follow these steps:

- Go to Application Menu > Settings > Miscellaneous Configurations. The Miscellaneous Configuration page appears.
- Click the Data Profiling Configuration tab. The Data Profiling Configuration tab appears.



Use the following options for setting up data profiling configuration:

- **Enable Native Profile**: Use this option to enable and configure a erwin Data Quality profile to sync erwin DI and erwin Data Quality and profile data.
- **Enable DQ Fields**: Specifies that only selected data quality parameters will be displayed across the assets in your organization.
- **Enable DQLabs**: Use this option to enable erwin Data Quality integration using connection details and schedule a sync job. For more information, refer to the Enabling DQLabs section.

Enabling DQLabs

To enable erwin Data Quality integration, follow these steps:

- 1. On the Data Profiling Configuration tab, click Enable DQLabs.
- 2. Click 🖍 Edit .

The DQLabs Configuration tab switches to edit mode and displays connection details.

This configuration requires Client ID and Client Secret from your erwin Data Quality instance. To get configuration details from erwin Data Quality instance, refer to the <u>Accessing erwin Data Quality Configuration</u> <u>Details</u> section.

Enable Native Profile	Enable DQ Fields	Enable DQLabs		
	History	C Test	Save	× Cancel
Connection Deto	ails			
Base URL(Private)				
Public URL				
Client Id				
Client Secret				
Harvest SDI Class Organization Name	ification 🗸 Enable D	Q For Smart Connect	or	

Configuring Data Profiling

3. Enter appropriate values in the fields. Refer to the following table for field descriptions:

Field Name	Description
Base URL (Priv-	Specifies the base URL of your erwin Data Qualitys instance.
ate)	For example, https://cloud.dqlabs.ai
Public URL	Specifies the public URL of your erwin Data Quality instance.
	For example, https://cloud.dqlabs.ai
	Specifies the alphanumeric client ID of your erwin Data Quality
Client Id	instance.
	For example, 2ax1x3xde-b8x8-4b134-aa08-xxx303p2b86f1fk
Client Secret	Specifies the client secret of your erwin Data Quality instance.
Harvest SDI Clas	Specifies whether SDI classifications for technical assets are impor-
sification	ted and updated in erwin Data Quality along with the DQ Score.
Enable DQ For	Specifies whether to sync the DQ Scores from erwin Data Quality for
Smart Con-	the assets based on smart connectors.
nector	
	Specifies the organization name for the smart connector. This option
Organization	is available when the Enable DQ For Smart Connector is enabled.
Name	Ensure that, the name in this filed matches the Organ- zation Name field in erwin Data Quality portal's settings page.

4. Click 🔁 Save .

The erwin Data Quality configuration is saved.

To test the configuration, click 🖙 Test. If the connection with the erwin Data Quality instance is established successfully, then a success message appears.

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

The next steps involve adding datasets in the erwin Data Quality and then, <u>scheduling a</u> <u>erwin Data Quality job</u>.

Accessing erwin Data Quality Configuration Details

To access Client I and Client Secret in your erwin Data Quality instance, follow these steps:

- Login to erwin Data Quality. Your erwin Data Quality instance opens.
- 2. On the app menu, click \bigcirc > Setting > Organization tab.
- Click Edit, then go to Systems tab and expand Api section. The Api section displays the Client ID and Client Secret.

		System	Configurations	Libraries	
Арі					
Client ID	Client	Secret			
4d 30-001 - 001 - 0050-00	70				
40 00000 000000000000000000000000000000	ZU		CONTRACTOR OF THE PARTY	5jV4iV0i	
Re-Generate Token	Revoke Token				

4. Hover over the values and click T to copy them, and paste them into erwin DI's erwin Data Quality Configuration section.

Scheduling erwin Data Quality Jobs

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

To schedule erwin Data Quality jobs, follow these steps:

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

	• History	C) Test	🖍 Edit
Scheduler Details			
Job Name Data Quality Synd			
Schedule Job On 04-21-2022 10:08			
Local 🐶 Server			
Interval Only Once			•
Send Email			
Primary Email abc@abc.com			
CC Email Ids			•
Hit the enter key for multiple emails			

2. Click 🖍 Edit

The Data Profiling Configuration tab switches to edit mode.

Scheduling erwin Data Quality 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	Specifies the job name.
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.
	Specifies whether the job uses local or server time.
Local or	• Local: Indicates that the job refers to the local machine
Server	• Server: Indicates that the job refers to the machine where your applic- ation is deployed
	Specifies the frequency of the job.
	Once: Indicates that the job runs only once
Interval	• 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	This field is autopopulated with your email ID. You receive email noti- fications about the scheduled job from the administrator's email ID.
Email	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.lvan@erwin.com

4. Click Schedule.

The erwin Data Quality fetches data quality analysis results, such as DQ Score at the scheduled time.

Scheduling erwin Data Quality Jobs

To view activity logs related to the erwin Data Quality jobs, click ⁽¹⁾ History. These logs include details of the jobs run by all users.

Activity	Activity Log						
#	Туре	Details	Date	User			
		Status : Success					
2	0	Message : Get Score Successfully	10/29/2021 06:44:00	Administrator			
2	v	Environment : Quest_Warehouse	10/29/2021 00:44:00	Auministrator			
		System : SQL System					
		Status : Success					
1	0	Message : Get Score Successfully	10/29/2021 06:37:00	Administrator			
1	v	Environment : Quest_Warehouse	10/20/2021 00:01:00	AurimiStrator			
		System : SQL System					

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 Configurations > Scheduled Jobs.

4	Email Se	ttings Notifications	Sensitivity Classification	DQLabs Configura	tion Scheduled	Jobs Asset Set			
Scl	Scheduled Job Details								
	#	Job Name	Job Type	Previous Fire Time	Next Fire Time	Job State			
	1 Co jot	mpliance Reports Default			21-12-2022 02:30:00	NORMAL			
	2 Ad	ministrator1584599690463	Metadata Scan	20-12-2022 13:08:42	21-12-2022 07:34:00	NORMAL			
	3 Dis	cover Assets Data Syncing		20-12-2022 13:44:00	20-12-2022 14:44:00	NORMAL			
	4 Ad	ministrator1588686769527	Metadata Scan	20-12-2022 13:57:00	21-12-2022 13:57:00	NORMAL			

The following page appears.

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 Configurations > Asset Settings.

Sensitivity Classification	Asset Settings	Norkflow Settings	Language Settings				
Metadata Assets			Ø				
	Display Color	Display	Label				
System	#26276D	System					
Environment	#F6C65B	Environ	nent				
Table	#F79548	Tables					
Column	#92d050	Columns	3				
Tags							
Tag	Display Color #DE3EB9	Display Tags	Label				
Dashboards							
Enforce User Assig	nment in Metadata	a Manager	OFF				
Enforce User Assig	Enforce User Assignment In Business Glossary Manager						

The following page appears.

- 2. Click 2.
- 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**.

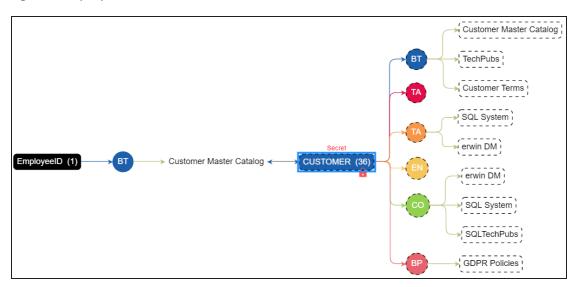
Configuring Asset Settings

l Settings Notifica	ations Sensitivity C	Classification	Asset	Settin	igs We	orkflo
Metadata Assets						×
	Display Color	Di	isplay L	abel.		
System	#26276D					
Environment	#F6C65B					
Table	#F79548					
Column	#92d050					
			Hue	239	Red	38
		#26276d	Sat	48	Green	39
Tags			Lum	29	Blue	109
Tag	Display Color #DE3EB9			Selec	t Can	cel

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.



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

Configuring Asset Settings

- 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 Version Retention

You can now configure the number of archived versions to retain and the retention period (in months) for mappings and environments. Also, you can view the activity logs related to archived versions.

This topic walks you through configuring version retention for mappings. Similarly, you can configure version retention for environments.

To configure version retention for mappings, follow these steps:

1. Go to Application Menu > Settings > Miscellaneous Configurations > Version Retention.

The following page appears.

on	Data Profiling Configuration	Scheduled Jobs	Asset Settings	Version Retention	Workflow Settings	Lar
		M	appings Met	adata		
		_				
				• Histo	ry 🎤 Edit	\$
# 2	# Of Archived Versions To Retain 2	n				
	lote* : The above number of arc automatically deleted.	hived versions will b	e maintained at ar	ny point of time for all m	naps. All older versions	s will be
	etention period (in months) 8					
N	lote* : Any archived data older t	han the specified pe	eriod will be autom	atically deleted as per t	the specified schedule	Э.
	Important Note* : All published maps (archive	ed versions only)	that meet the d	eletion criteria will b	e permanently dele	eted.

2. Under Mappings, click Z Edit.

The page switches to edit mode.

Configuring Version Retention

Data Profiling Configuration	Scheduled Jobs	Asset Settings	Version Retention	Workflow Settings	Langu
	M	appings Me	tadata		
	_				
		- Histo	ory 📑 Save	😣 Cancel	\$
# Of Archived Versions To Retain 2	n				
Note* : The above number of arc automatically deleted.	hived versions will b	e maintained at ar	ny point of time for all m	naps. All older versions	s will be
Retention period (in months) 18					*
Note* : Any archived data older t	han the specified pe	eriod will be autom	atically deleted as per	the specified schedule	э.
A Important Note* :					
All published maps (archiv	ed versions only)	that meet the d	eletion criteria will b	e permanently dele	eted.

3. Use the following options to archive and retain the mapping:

Of Archived Versions To Retain

Use this option to specify the number of archived versions you want to retain.

The number of archived versions for all mappings is maintained at any given time, and older versions are automatically deleted.

Retention period (in months)

Use this option to specify the retention period for archived versions.



The archived data older than the specified period is automatically deleted.

4. Click Save.

The version retention is configured for mappings.

To view activity logs related to the retained archived versions, click ⁽¹⁾ History . Additionally, use

to <u>schedule clean up jobs</u> for archived mappings and set <u>history retention period (in</u> <u>months)</u>.

Scheduling Clean up Jobs

You can now schedule a job to clean up archived mappings and environments.

This topic walks you through scheduling clean up jobs for archived mappings. Similarly, you can schedule clean up jobs for archived environments.

To schedule clean up jobs for archived mappings, follow these steps:

1. Go to Application Menu > Settings > Miscellaneous Configurations > Version Retention.

The following page appears.

on	Data Profiling Configuration	Scheduled Jobs	Asset Settings	Version Retention	Workflow Settings	Lar
		Mo	appings Met	adata		
		_				
				Histo	ory 🧪 Edit	D D
#	Of Archived Versions To Retain	h				
2						
N	ote [*] : The above number of arc utomatically deleted.	hived versions will b	e maintained at ar	ny point of time for all n	naps. All older versions	s will be
R 18	etention period (in months) 3					
N	ote* : Any archived data older t	han the specified pe	eriod will be autom	atically deleted as per	the specified schedule	э.
	Important Note* :					
/	All published maps (archive	ed versions only)	that meet the d	eletion criteria will b	e permanently dele	eted.

- 2. Under Mappings, click 🍄.
- 3. Click Schedule.

The following page appears.

Scheduling Clean up Jobs

Job Scheduler	×
Job Name Archive Map Cleanup	
Schedule Job On 08-01-2024 12:46:22	
Local 💽 Server	
Interval Only Once	•
Send Email 💷	
Email Id abc@abc.com	
CC Email Id(s)	•
Hit the enter key for multiple email(s)	SUBMIT

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
Job	Specifies the job name.
Name	This field auto-populates 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, 08-01-2024 12:46:22.
Local or	Specifies whether the job uses local or server time.

Scheduling Clean up Jobs

Field Name	Description
	Local: Indicates that the job refers to the local machine
Server	Server : Indicates that the job refers to the machine where your application is deployed
	Specifies the frequency of the job.
	Only Once: Indicates that the job runs only once
Interval	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.
	This field is auto-populated with your email ID. You receive email noti-
Email Id	fications about the scheduled job from the administrator's email ID.
	For example, Chris.Duck@erwin.com
	Specifies the email IDs that receive job notifications other than you. Enter a
CC Email	comma-separated list of email IDs that should receive email notifications
ld(s)	about the scheduled job.
	For example, ab.dav@xyz.com, cal.kai@xyz.com

5. Click Submit.

The archive map cleanup job is scheduled.

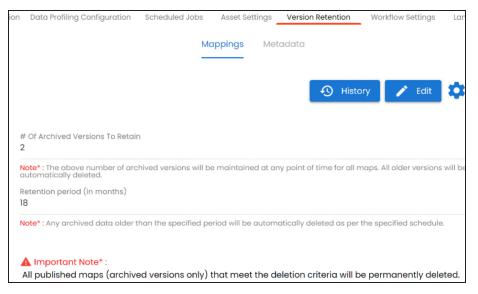
Setting History Retention Period (in months)

You can now set the number of months you wish to keep the history of archived data.

To set a history retention period, follow these steps:

 Go to Application Menu > Settings > Miscellaneous Configurations > Version Retention.

The following page appears.



- 2. Under Mappings, click 🍄.
- 3. Click History Retention Period (in months) and select the required options.

Once the history retention period is set, a successful pop-up appears.

History Retention Period is successfully saved.

Configuring Workflow Settings

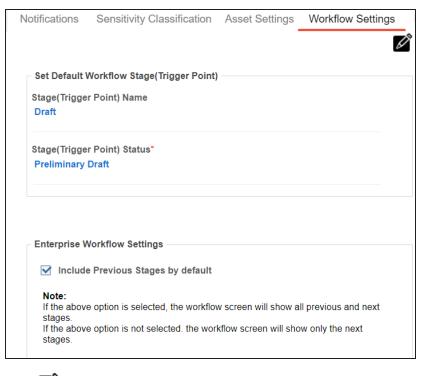
You can configure the following on the Workflow Settings tab:

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

To configure workflow settings, follow these steps:

 Go to Application Menu > Settings > Miscellaneous Configurations > Workflow Settings.

The following page appears.



- 2. Click 2.
- 3. Use the following sections:

Set Default Workflow Stage(Trigger Point)

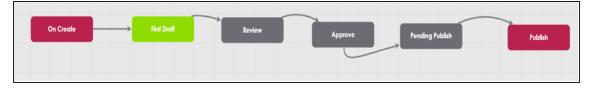
Use this section to configure a default first stage of workflows. This stage is applicable to all workflows. By default, both, the stage name and status, are set to Draft.

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 work-flows.

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.

Workflow Status	Preliminary Draft	^
Send To - Review		

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.

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

Configuring Workflow Settings

Excludes previous stage	Includes previous stage
Workflow Status Pending Approve	Workflow Status Pending Approve
Send To - Pending Publish	Back To - Review Send To - Pending Publish

4. Click 💾.

Workflow settings are configured.

Configuring Language Settings

You can use erwin Data Intelligence (erwin DI) in one of the following supported languages:

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

To use the application in any of these languages, configure user-based language preference in the Resource Manager. For more information, refer to the <u>Creating Users and Assigning</u> <u>Roles</u> topic.

Starting erwin DI v15.0, language settings for supported languages are pre-configured. However, you can edit or configure your own language settings for UI labels.

To configure language settings for UI labels, follow these steps:

Go to Application Menu > Settings > Miscellaneous Configurations> 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

figuration Scheduled Jobs Asset S	ettings Version Retention	Workflow Settings	Language Settings
\$3			
Key Description	ENGLISH	CHINESE	FRENCH
🗄 🛅 Business Glossary Manager	Business Glosary Manager	商业格拉萨里经理	Business GloSary Manager
Permissions	Permissions	权限	Autorisation
Code Automation Templates	Code Automation Templates	代码自动化模板	Modèles d'automatisation de c
🕀 📑 Codeset Manager	Codeset Manager	CodeSet Manager	Gestionnaire de codes
	HistoryType	历史类型	Type d'histoire

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

Notifications	Sensitivity Classification	DQLabs Configuration	Scheduled Jobs Asset Settings
Data Governance			
55			
Key Description		ENGLISH	CHINESE
🗄 📄 Business Glossa	ary Manager	Business Glosary Manager	商业构故萨里经理
		Permissions	₹ 天文のrt Chinese
🗄 📑 Code Automatio	n Templates	Code Automation Template	es 代码自动化模板
🕀 📑 Codeset Manage	er	Codeset Manager	CodeSet Manager

The Import Properties page appears.

Configuring Language Settings

Import Properties	_ 🗆 ×
Attach Choose File No file chosen	
(†	

- 3. Click Choose File and select a language property file.
- 4. Click 1

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 💾.



Edit the necessary cell in a language column to use your own UI labels for user defined fields.

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 Configurations > License Renewal Reminder.

The following page appears.								
gs Workflow Settings	Language Settings	License Renewal Reminder						
		Ø						
Send Email	OFF							
Reminder Duration :	30							
Snooze :	3							
Email To	OFF							
Email Ids* :								

The following page appears.

2. Click 2.

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

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 Configurations > Form Validation Settings.

The	followi	ng page app	ears.							
■ Se	ettings	Language Setting	s License Rene	wal Reminder	Form	Validation S	ettings	Data Lin	eage	s,
									I	+
#	Name		Description			Associate Objects	Base Form		Opti	ions
1	Table Prop	oerties - Metadata I	Default template to co	nfigure table field prop	perties	0			e o	/
2	Column Pr	operties - Metadat	Default template to co	nfigure column field p	ropert	0			1.0	/
3	Environme	ent Properties - Met	Default template to co	nfigure environment fi	ield pro	0			/ 0	/

2. Click 🖸

The Add Form page appears.

Configuring Form Validation Settings

Add Form	- - ×
Next Save & E	Exit Cancel
Form Name *	
Description Image: Image:	∃ *≣ *≣ ✔
Form Type *	
Select Option	

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
	Specifies the unique name of the form.
Form Name	For example, Adventureworks Metadata.
	Specifies the description about the form.
Description	For example: The form is to validate metadata in the Adventureworks
	environment.
Form Tuno	Specifies the type of the form.
Form Type	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 Configurations > Form Validation Settings.

The following page appears.

• Se	ttings	Language Setting	License Renewal Reminder	Form	Validation S	ettings	Data Lineage S
#	Name		Description		Associate Objects	Base Form	Options
1	Table Prop	perties - Metadata I	Default template to configure table field p	properties	0		101
2	Column P	roperties - Metadat	Default template to configure column fiel	d propert	0		1 0 1
3	Environme	ent Properties - Met	Default template to configure environme	nt field pro	0		101

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

The Configure Form Fields page appears.

Configuring Form Fields

Configure Form Fields		_ = ×			
Filter Fields by All	•		Save & Exit Cancel		
Field Name		Property	Value		
		Mandatory	OFF		
Associated Business Term		Default value			
Business Key Flag		Regular Expression			
Column Alias		Order	6		
Column Class		Visibility			
Column Comments					
Column Definition					
Column Name					
Created By					
Created Date Time					
File Starting Position	•	Note [•] : This is a system field whose properties cannot be modifie	ed.		

- 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

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	
	You can associate it to multiple environments or Systems.	
Table Properties	If the form is associated with a system then it is applicable to all the envir-	
	onments under the system.	
Column Dron	You can associate it to multiple environments or systems.	
Column Prop- erties	If the form is associated with a system then it is applicable to all the envir-	
critics	onments under the system.	
Environment	You can associate it to multiple systems.	
Properties		

To associate forms, follow these steps:

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

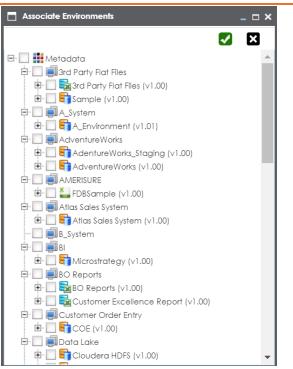
The following page appears.

Se	ttings	Language Settings	License Renewal Reminder	Form	Validation S	ettings	Data Lineage S
#	Name		Description		Associate	Base Form	Options
					Objects		
1	Table Prop	perties - Metadata I D	efault template to configure table field	properties	0		101
2	Column P	roperties - Metadat D	efault template to configure column fie	ld propert	0		101
3	Environme	ent Properties - Mel D	efault template to configure environme	ent field pro	0		8 0 1

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

The Associate Environments page appears.

Associating Forms



3. Select the systems or environments, and click \checkmark .

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 Configurations > Form Validation Settings.

The following page appears.

Se	ettings	Language Setting	gs License Renewal Reminder	Form	Validation S	ettings	Data Lii	neage	s .
#	Name		Description		Associate Objects	Base Form		Opti	ons
1	Table Prop	perties - Metadata I	Default template to configure table fie	d properties	0			2.0	/
2	Column P	roperties - Metadat	Default template to configure column	field propert	0			2.0	/
3	Environme	ent Properties - Mei	Default template to configure environr	ment field pro	0			2 O	/

2. Use the following options to manage forms:



To edit forms, click 🖊.

Managing Forms

					_ C
				Save	& Exit Cance
Form Name *					
Form_Name					
Description					
	I U	₣₮₮₽	ŧ≘ t ≘ * ≣	'≡ ∢	
This form is for column			,	_ •	
					-
Form Type *					Ţ
Form Type *	tadata Mana	ger			v

Delete (X)

To delete forms, click 🗙.

History (😷)

To view the activity log of the forms, click \mathfrak{P} .

Data Lineage Settings

Mapping specification records are auto synced with lineage tables as an when they are created or imported. You can re-sync mapping records with lineage tables in case of any disruption.

To re-sync mapping records with the lineage tables, follow these steps:

1. Go to Application Menu > Settings > Miscellaneous Configurations > Data Lineage Settings.

_								
4	guage Settings	License Renewal Reminder	Form Validation Se	ttings	Data Lineage Settings	ALM Configuration	Menu Theme	D:
	following two op	ecification records are auto synct tions have been provided so that ords with the lineage tables using Add Ne	should any disri these options.	lineag will no	e UI. If the actual number of c	3000 on of connected links that will be di onnected links exceed this thres n on the lineage UI and will swite	hold, then the appli	cation
4	i.e. new records	oad only new mapping records th only. This option is an alternate to I lelete all the existing records from	o sync any new d	Sync T Add Ne		ast Synced by User ministrator	Last 5 20-05-2	Synced D 2020

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 mapping specification table since the last sync.

Delete & Reload

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

Statistics

This section displays statistical information about lineage sync.

Lineage Sync History Log

This section displays the lineage sync activity log.

Links Threshold

Lineage appears in two views, graphical and grid. Under the Links Threshold section, you can set the threshold value of connected links such that if number of connected links exceeds this value, 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 \swarrow .
- 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 control lineage visibility (overview or expanded technical) for lineage reports. By default this option is enabled.

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:

 Go to Application Menu > Settings > Miscellaneous Configurations > ALM Configuration.

The following page appears.

•	Email Settings	Language Settings	Login Images	ALM Configuration	Tags	License Renewal Reminder
						Ø 💸
	Domain* :					
	User Name* :					
	Password* :					
	Project* :					
	URL*:					
	HP ALM Version	12.5				
	Activate HP AL	M Sync 📃				

2. Click 2.

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

Configuring HP ALM

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

4. Click \gtrsim 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 Configurations > Menu Theme.

Login Screen and Theme Configuration		
		EDIT SAVE
Default Menu theme		Enable Login Screen Text
Instance Name		Header
Primary Theme Color #5c5d61	ð	Body
Secondary Theme Color #e9636e	ð	
Enable Client Logo		Footer
Upload Client Logo 0.0B / 0.00%		Login Screen Text Color #ffffff
Hide disabled modules from end user view		Enable Default Background
		Upload Login Image 0.087/0.00%

The following page appears.

- 2. Click Edit.
- 3. Switch the Default Menu theme option off.
- 4. 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:

Primary Theme Color: #131413

Secondary Theme Color: #505670

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 v15.0.

Login Screen and Theme Configuration	
	CANCEL SAVE
Default Menu theme	Enable Login Screen Text
Instance Name erwin DI v12.1	Header
Primary Theme Color #131413	Body
Secondary Theme Color #505670	4
Enable Client No Image Found ! Logo	Footer
Upload Client Logo 0.0B / 0.00%	Login Screen Text Color #fffff
Hide disabled modules from end user view	Enable Default Background
	Upload Login Image 0.0B / 0.00% +

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.

erwin Data Intelligence	Miscellaneous Configurations			
Q Discover Assets	y Classification	DQLabs Configuration		
My Action Center				
erwin				
Data Intelligen	ce			
You have successfully logged out User Name *				
Password *				
 I accept & agree to the terms of the Software Tra Agreement 	ansaction			
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.

:	erw	in Data Intelligence
	Q	Discover Assets
	D	My Action Center
		Data Catalog
	லீ	Data Literacy
	·ψ·	Data Quality
	08	Miscellaneous
	660	Settings
		erwin

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.

Hide disabled modules from end user view

Switch this option **ON** to hide disabled modules in the application menu.

5. Click Save.

The menu theme is configured.

Configuring Security Setting

Under security settings, you can configure whether you are notified when you navigate out of erwin Data Intelligence (erwin DI) to an external website or application. You can also customize the message that is displayed in the warning.

To configure security setting, go to **Application Menu > Settings > Miscellaneous Configurations > Security Settings**.

The configuration page appears. By default, the Secure Exit Warning option is enabled.



Switch **Enable Secure Exit Warning** to **ON** or **OFF** based on your requirement. If switched on, a warning message appears if you leave the application and are about to navigate to an external site.

Warning							
You are leaving a secure site and are about to enter an external site. Do you want to proceed?							
Yes No							

You can add or edit the Secure Exit Message.

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 Configurations > Business Entity Types.

inea	ge Settings	ALM Configuration	Menu Theme	Date Format	Security	Settings Busin	ness Entity Types
Busi	ness Entity Typ	es					+
#	Entity Name	Object Type	Background Color	Text Color	Icon	Created By	Created Date Time
1	System	SYSTEM	•	0	₽	System	12-05-2022 07:
2	Amazon R	ENVIRONMENT	•	•		System	12-05-2022 07:
3	ARANGODB	ENVIRONMENT		•	-	System	12-05-2022 07:

2. Click +.

Configuring Business Entity Types

	aa Basiness Entry	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	P ~ 0
Add Bu	isiness Entity Type	8	×
	Entity Name *		
	Object Type *	•	
	Background Color *	ð	
	Text Color *	Ø	
	Upload Icon 0.0B / 0.00%	÷	

The Add Business Entity Type page appears.

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

Field Name	Description
Entity Name	Specifies the unique name of the entity.
Object Type	Specifies the object type. You can select either Environment or
	Table.
Background	Specifies the background color of the object created with the
Color	entity.
Text Color	Specifies the text color of the object created with the entity.

4. Click +.

The uploaded file is used as an icon.

5. Click .

The business entity type is saved.

The selected icon and colors are displayed on the Data Lineage tab in the Metadata Manager and Discover Assets modules for the environment or table created with this business entity type. For example, in the following Data Lineage, the Graphical View displays the icon, the background color, and the text color for the Synapse Test environment as set up for the business entity type of this environment.

dbo.Categories Graphical View Grid View	
Graphical View Grid View	
Dual Lineage: Others \rightarrow Synapse Test \rightarrow dbo.Categories	
Salesforce	
🖸 🌺 Synapse Test	
>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	
If dbo.Categories D If dbo.Employees D If dbo.Region D If dbo.Region	

You can also view the icon with the environment name in multiple places, such as Metadata Tree View on the Graphical Designer tab of the Mapping Manager.

Configuring IDR Setting

You can configure the Instance Data Replication (IDR) setting to establish a connection between erwin Data Intelligence on-premises and erwin DI Cloud instance to enable data replication between them. To ensure the data is copied consistently between the onpremises and the cloud instance, the connection between the instances is authenticated using the token generated from the cloud instance. For more information about generating the token for authentication, refer to <u>Generating Authentication Tokens</u>.

Once you configure the IDR setting and authenticate the token, you can <u>schedule jobs</u> to sync data between the instances.

For more information about configuring erwin DI Cloud, refer to <u>erwin DI Cloud Con-</u><u>figuration</u>.



Configuring the IDR setting is applicable only when you want to access erwin DI Cloud within a firewall zone to connect to data sources that cannot be accessed from the erwin DI Cloud. You can configure and authenticate both instances from the erwin DI on-premises instance.

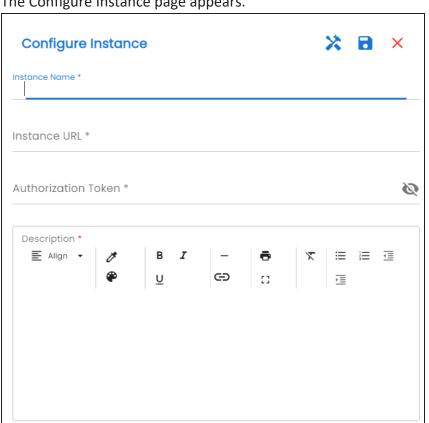
To configure the IDR settings, follow these steps:

 Go to Application Menu > Settings > Miscellaneous Configurations > IDR Configuration.

The following page appears, and the Instances Grid tab appears by default.

Inst	ances Grid Sched	duled Jobs						C +
#	Instance Name	Instance URL	Description	Created By	Created Date	Last Modified By	Last Modified Date	Actions
1	Data On Cloud 34	http://10.250.30.39:8080/DISuite14	Instance Authentication Grid for D	Administrator	22-07-2024 14:26:39	Administrator	22-07-2024 14:26:39	/ ~ 🛪 🗉
2	Cloud 11	http://10.250.30.39:8080/DISuite14	Links to the Cloud 11, Quest hosted.	Administrator	22-07-2024 14:28:34	Administrator	22-07-2024 14:28:34	/ ~ 🗙 🛢

2. Click +.



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

Field Name	Description
Instance	Specifies the name of an instance.
Name	
Instance URL	Specifies the URL of the cloud instance for data replication.
	Specifies the authentication token to connect the cloud and on-
	premises instances.
Authorization	This token is generated on the cloud instance and you can copy-paste
Token	the token from the cloud instance. For more information about gen-
	erating an authentication token, refer to Generating Authentication
	<u>Tokens</u> .

The Configure Instance page appears.

Configuring IDR Settings

Field Name	Description
Description	Specifies the description of the instance.

- 4. Click **X** to test the connection between the instances.
- 5. Click 🔂.

The saved IDR configurations are displayed under the Instances Grid tab.

Inst	ances Grid Sched	luled Jobs						C +
#	Instance Name	Instance URL	Description	Created By	Created Date	Last Modified By	Last Modified Date	Actions
1	Data On Cloud 34	http://10.250.30.39:8080/DISuite14	Instance Authentication Grid for D	Administrator	22-07-2024 14:26:39	Administrator	22-07-2024 14:26:39	🖌 🕶 💥 🛢
2	Cloud 11	http://10.250.30.39:8080/DISuite14	Links to the Cloud 11, Quest hosted.	Administrator	22-07-2024 14:28:34	Administrator	22-07-2024 14:28:34	/ 🗙 🛢

Once the authentication between the instances is complete, you can manage them under the Actions column.

You can manage the IDR configuration using the following options:

' Edit (🧪):

Use this option to edit the IDR configuration, description, and other properties.

Update Token (💁):

Use this option to update the authentication token.

Ping (X):

Use this option to ping the configured instance.

Delete (📒):

Use this option to delete an IDR configuration.

Scheduling IDR Jobs

Afterconfiguring the Instance Data Replication (IDR) instance, you can select data on the onpremises instance and sync them to the cloud by scheduling a job. This topic walks you through selecting required technical and business assets on the Instance Data Replication Wizard for data replication and sync them to the cloud instance using a job.

For more information about configuring an IDR instance, refer to Configuring IRD Settings.

Once you configure the IDR setting and authenticate the token, you can schedule jobs to sync data between the instances.

For more information about the steps to configure erwin DI Cloud, refer to <u>erwin DI Cloud</u> <u>Configuration</u>.



Scheduling IDR jobs is applicable only when you want to access erwin DI Cloud within a firewall zone to connect to data sources that cannot be accessed from the erwin DI Cloud. You can schedule IDR jobs from the erwin DI on-premises instance.

To schedule jobs to sync data between the instances, follow these steps:

1. Go to Application Menu > Settings > Miscellaneous Configurations > IDR Configuration > Scheduled Jobs.

The following page appears and displays scheduled jobs for data sync.

Insta	ances Grid	Scheduled Jobs					
#	Job Id	Job Name	Job Type	Status	Next Fire Time	Target Instance	Target Job Id
1	1	IDRJob_1717085734037	٩	Export Created	N/A	Test_on_prem_agent1	

2. Click +.

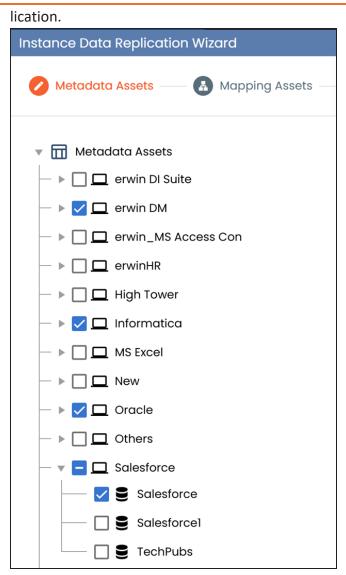
The Instance Data Replication Wizard appears, and the Metadata Assets tab displays by default.

🗇 Metadata Assets	Asset Update Options
Image:	Add New
▶ 🗌 🗖 erwin DM	Update Existing + Add New
C	Update Existing + Add New + Invalidate
▶ □ □ erwinHR	Delete & Reload
▶ 🗌 🛄 High Tower	Ŭ
Informatica	⊗ Version
MS Excel	Additional Options
New	Include Extended Properties
Cracle	
Chers	Include Asset Associations
Salesforce	Include Sensitive Data Indicators
▶ □ □ SAP	× D Include Tags
▶ □ □ Snowflake	
▶ 🗌 🗖 SQL System	Include Enterprise Configurations for Associations and Relationships
▶ □ □ SQLTechPubs	× Include Comments
System Demo	
▶ 🗌 🗖 System One	Include Valid Values
TABLEUAU	Include Indexes

This wizard displays all the asset types available on the on-premises instance and allows you to select assets to replicate on the cloud instance, with asset update options on the right side.

3. On the Metadata Assets tab, select the required assets for data replication. You can also expand a system node to select specific environments for data rep-

Scheduling IDR Jobs



- 4. On the Metadata Assets tab, choose the asset update options and additional options based on your requirements. For more information on these options, refer to the Asset Update Options section.
- 5. Click **Next**. This action navigates you to the different asset types for data selection and replication.

Repeat steps 3 to 5 to select assets on the Mapping Assets, Business Glossary Assets, and Data Marketplace Assets tabs.

Scheduling IDR Jobs

- 6. Select required assets and asset update options from the wizard. Then, click **Next** to navigate to a different asset type to continue you selection based on your requirements.
- 7. Click Next.

The Confirm Selections tab will appear, and display the selected assets for each asset type.

	METADATA		T MAPPING		DI BUSINESS GLOSSAF	RY.	😫 DATA M	ARKETPLACE
	erwin DM	SYSTEM	Informatica	SYSTEM	□ Salesforce	(SYSTEM)	SAP SAP	(SYSTEM)
	SQL System	(SYSTEM)	Snowflake SNOWFLAKE SAMPLE_DATA	(ENVIRONMENT)	Snowflake TechPubs	(ENVIRONMENT)	TABLEUAU	(SYSTEM)
	TALEND	(SYSTEM)		(SYSTEM)	erwin_MS Access Con	(SYSTEM)	MS Excel	(SYSTEM)
9	SQLTechPubs DM_Landing_158	(ENVIRONMENT)	SQLTechPubs erwinSales	(ENVIRONMENT)	SQLTechPubs SQLTechPubs	(ENVIRONMENT)	S XMI R1	(ENVIRONMENT)
9	Tech pubs Spreadsheet Env	(ENVIRONMENT)	L test_to be deleted	(SYSTEM)	🗖 erwin DI Suite	(SYSTEM)	S JASON_HR	(ENVIRONMENT)
9	erwinHR XSD Env	ENVIRONMENT	To be deleted	(SYSTEM)	High Tower	(SYSTEM)	System One	(SYSTEM)

You can hover over an asset to remove it from the selection. The above screenshot displays the asset selection for Metadata. Similarly, you can navigate to other asset types

ance Data Replication	n Wizard		
Metadata Assets —	— 🔗 Mapping Assets —	Business Glossary Assets	🕘 Data Marketplace Assets —— 🥑 Confirm Selections —— 🧭 Schedule Syn
Job Name IDRJob_1746540938214 			Select the Master erwin Data Intelligence Instance to push the selected data to Data On Cloud 34
Run Now 🔊			
Schedule Job On 06-05-2025 14:23:51			Incase you cannot find your instance in the above drop down Create a new Instance
Local 🕡 Server			
Interval Only Once		•	
Send Email 🔳			
			PREVIOUS FINIS

- 8. Additionally, you can click Add More to add additional assets before scheduling an IDR job.
- 9. Click **Next** to go to the Schedule Sync Job tab.

On this tab, enter the appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Job Name	Specifies the job name.
	Specifies whether to run an IDR sync job immediately.
Run Now	pabling this option disables Schedule Job On, control of Serve, and Interval options.
Schedule Job On	Specifies the date and time of the job. Use is to select a date, and is to select a time.
Local or Server	For example, 11-01-2041 16:41. Specifies whether the job uses local or server time.
	specifies whether the job uses local of server time.

Scheduling IDR Jobs

Field Name	Description	
	• Local: Indicates that the job refers to the local machine	
	• Server: Indicates that the job refers to the machine where your application is deployed	
	Specifies the frequency of the job.	
	• Once: Indicates that the job runs only once	
Interval	• Every Day: Indicates that the job runs every day	
Interval	• 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.	
Email ID	This field is autopopulated with your email ID. You receive email notifications about the scheduled job from the administrator's email ID.	
	his option is available when the Send Email ption is switched to ON .	
CC Email Id(s)	Specifies a list of email IDs that should receive email noti- fications about the scheduled job. Hit enter after each to add multiple email IDs.	
	ption is switched to ON .	
Select the Master erwin		
-	Specifies the erwin DI Cloud instance to replicate the selec-	
to push the selected data to	ted data based on the scheduled job.	
Use this option to create a new instance for data rep- Create a new Instance lication using the authentication token. For more information about creating an IDR instance, refer to <u>Configuri</u>		

Scheduling IDR Jobs

Field Name	Description
	IDR Setting.

10. Click Finish.

The job is executed and the data is exported to the cloud instance based on the sync job.

Asset Update Options

You can also determine how the data are updated on the cloud instance, in addition to selecting assets for data replication.

To update the assets based on the options listed in the table below, use the Asset Update Options and Addition Options sections for each asset type.



Availability of the below options on the Instance Data Replication Wizard depends on the asset type.

Section	Option	Description
Upda Asset Update Upda Options + Inv	Add New	Specifies whether to add new assets to the existing
	Add New	list. Existing data is not updated.
		Specifies whether to add new assets to the existing
	Update Existing + Add New	list and also update the existing asset data at the
		same time.
	Update Existing + Add New	Specifies whether to add new assets to the existing
	+ Invalidate	list, and also update and invalidate the existing
		data at the same time.
	Delete & Reload	Specifies whether to delete all the existing data and
		sync only the new assets that are selected.
	Version	Select this option to create a new version of the
	Version	environment.
Additional Options	Include Extended Properties	Switch this option ON to include the extended prop-
		erties of the assets.
	Include Asset Associations	Switch this option ON to include any assets that are
		associated with the asset.

Scheduling IDR Jobs

Section	Option	Description
	Include Sensitive Data Indic-	Switch this option ON to include the sensitive clas-
	ators	sification associated with the asset.
	linclude Tags	Switch this option ON to include the tags asso-
		ciated with the asset.
	Include Enterprise Con- figurations for Associations and Relationships	Switch this option ON to include configurations and relationships associated with the asset.
	Include Valid Values	Switch this option ON to include the valid values associated with the asset.
	Include Indexes	Switch this option ON to include the indexes asso- ciated with the asset.

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:

 Go to Application Menu > Settings > License Key. The License tab appears.

License		
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	Activate License
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.

Configuring License

Allowed Manager. Projects For example, when the value is set Mapping Manager.	y/organization. ojects that you can create in Mapping as 30, you can create 30 projects in bject areas that you can create per
Allowed Manager. Projects For example, when the value is set Mapping Manager.	as 30, you can create 30 projects in
Mapping Manager.	
Allowed Specifies the allowed number of su	bject areas that you can create per
Subjects project.	
Areas Per For example, when the value is set Project a project.	as 2, you can create 2 subject areas in
can include modules, such as Meta	e enabled for this license. Your license data Manager, or Mapping Manager, other relevant modules based on your
The value Enabled indicates the mo Specifies the allowed number of us Allowed Manager.	odule is included with your license. ers that you can create in Resource
Users For example, when the value is set roles. This includes all user role typ	
Concurrent Specifies the number of allowed lo	gins for a user at the same time.
Logins For example, when the value is set Allowed different instances at the same tim	as 10, the same user can log in at 10 e.
User Multi Login Specifies whether multiple logins a Allowed	re allowed for users or not.
License Created Specifies the license creation date Date	and time.
Validity Specifies the license validity in days	i.
License Specifies the license expiry date an	d time.

Configuring License

Title	Description
Expiry Date	

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

The license is updated.