

# erwin Data Modeler

# **DM Connect for DI**

Release 12.1

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## **DM Connect for DI Overview**

erwin now offers an integration, **DM Connect for DI**, between two powerful products, erwin Data Modeler (DM) and erwin Data Intelligence Suite (DI Suite). This offering enables you to maintain a single metadata and glossary source across erwin DM and erwin DI Suite using erwin Mart Administrator as an interface. Apart from this, DM Connect for DI offers the following benefits

- Use data models as a foundation for data governance initiatives
- Automatically update data catalog
- Maintain a business glossary based on naming standards

## Workflow

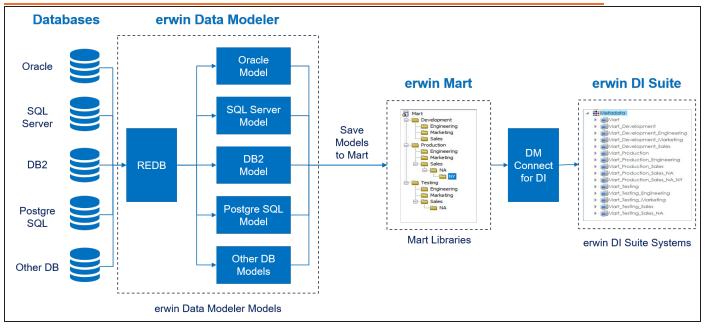
erwin DM supports several target databases. It provides a powerful and robust workspace to create rich data models based on these target databases. Further, it provides connectivity to erwin Mart Server (MS); where you can store your rich data models in a mart repository.

erwin Mart Administrator (MA) provides you with a way to interact with erwin MS. It also acts an interface between erwin DM and erwin DI Suite. It enables you to schedule jobs to export data models and data sources from your mart repository to erwin DI Suite's Data Catalog. Further, it integrates the naming standards set up on your models into the Business Glossary Manager.

erwin DI Suite enables you to use your data models as a foundation for your data governance initiatives. It enables you to maintain a semantic lineage between metadata and business objects.

To summarize, erwin Data Modeler, erwin Mart Administrator, and erwin DI Suite work together as follows.

#### **DM Connect for DI Overview**



You can not export models from erwin Mart Server and erwin DM 12.1 to erwin DI v11.0 and v11.5.

The following table explains the erwin DM, erwin Mart Server, erwin DI version compatibility:

Products and Ver- sions	erwin Dl 10.0	erwin Dl 10.1	erwin Dl 10.2	erwin Dl 11	erwin DI 11.5	erwin DI 12.0
erwin Mart Server 2021R1	Yes	Yes	Yes	Yes	Yes	No
erwin Mart Server 12.0	Yes	Yes	Yes	Yes	Yes	No
erwin Mart Server 12.1	No	No	No	No	No	Yes

Before configuring erwin DM Connect for DI, ensure that the prerequisites for erwin Mart Server and erwin Data Intelligent Suite (DI Suite) are in place:

- System requirements:
  - erwin Mart Server
  - erwin DI Suite
- Permissions:
  - erwin Mart Server
  - erwin DI Suite

erwin DI Suite DocumentsPath

### erwin Mart Server System Requirements

Refer to the following tables for minimum system requirements.

Parameter	Requirement		
Hardware/Workstation	<ul> <li>4 GHz or higher quad-core processor</li> <li>16 GB RAM</li> <li>100 GB of disk space or more as required to support your specific mart</li> </ul>		
Operating System	<ul> <li>Microsoft Windows Server 2012, R2</li> <li>Microsoft Windows Server 2016</li> <li>Microsoft Windows Server 2019</li> <li>Microsoft Windows Server 2022</li> <li>Microsoft .NET Framework 4.0 and above</li> <li>All current Microsoft Windows critical updates</li> </ul>		
Database	<ul> <li>Microsoft SQL Server 2016 SP2 or the certified versions 2017 and 2019, and Microsoft SQL Azure 12, and Amazon RDS SQL Server 2019</li> <li>For DM Connect for DI, the minimum SQL Server</li> </ul>		

	version requirement is SQL Server 2016 SP2			
	<ul> <li>Oracle 12c R2, 18c, 19c, and 21c</li> <li>PostgreSQL through version 9.6.2 or the certified versions 9.6.21, 9.6.24, 10.16, 10.20, 11.11, 11.14, 12.9, 13.2, and 13.5. You can also use PostgreSQL certified version 11.8 for Amazon Aurora.</li> </ul>			
erwin Mart Admin- istrator Web Client - Browser	<ul> <li>Microsoft Edge v97 or newer</li> <li>Mozilla Firefox v91 or newer</li> <li>Google Chrome v97 or newer</li> <li>Apple Safari 15 or newer</li> </ul>			
Tomcat Memory	In the C:\Program Files\erwin\Mart Server r9\Tom- cat64\bin\startup.bat file, update the following setting to increase the RAM in MBs: set "CATALINA_OPTS=-Xms256m -Xmx1028m"			
Tomcat Memory (Large Mart)	In the C:\Program Files\erwin\Mart Server r9\Tom- cat64\bin\startup.bat file, update the following setting to increase the RAM in MBs: set "CATALINA_OPTS=-Xms1024m -Xmx12288m" That is, (1GB - 12GB)			
Web Server	Apache Tomcat 9.0.62			
JDK	AdoptOpenJDK (build 11.0.6+10)			

## erwin DI Suite System Requirements

Parameter	Requirement
Hardware/Workstation	<ul> <li>VM or Dedicated Physical Server</li> </ul>
	<ul> <li>Processor - 64-bit, minimum 4 cores</li> </ul>
	• RAM:
	<ul> <li>16 GB for limited user POCs</li> </ul>
	<ul> <li>32-64 GB for enterprise production deployment</li> </ul>
	Hard Disk Drive - 200-300 GB

Operating System	<ul> <li>Microsoft Windows - Windows Server 2016 and above</li> <li>Linux v4.19 and above</li> <li>RHEL 8.0 and 8.5</li> <li>Amazon Linux 2</li> </ul>		
Database	SQL Server 2016, 2017, 2019     For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2		
	• Oracle 12c, 18c, 19c		
Browser	<ul> <li>Microsoft Edge v86x or newer</li> <li>Google Chrome v86.0 or higher</li> <li>Mozilla Firefox v82.0 or higher</li> </ul>		
Web Servers	Apache Tomcat v9.0.58		
Web Server Memory Allocation	Allot at least 50 percent of available memory. For example, if available memory is 16GB, allot at least 8GB.		
Web Client Work- station	<ul> <li>Processor - i3 or higher</li> <li>RAM - 8GB minimum</li> <li>Minimum Free Space - 1-2GB</li> </ul>		

In case of enterprise deployment, for the best performance, it is recommended to allot at least 0.5 GB space per user on the application server. For example, if 30 users log on simultaneously, the application server must have at least 15 GB of RAM allocated to it.

The above RAM allocation does not indicate the RAM of the server machine. It indicates the physical RAM allocation to the application server.

## **Database Server Specifications**

The following table lists database server specifications:

Parameter	Requirement
Server Type	Dedicated standalone server
Processor	64-bit, minimum 4-8 cores

RAM	32 GB
Hard Disk Drive	250-500 GB
Tablespace	50 GB, minimum



erwin DI Suite requires a dedicated schema/database (SQL Server or Oracle) with at least 50 GB tablespace allocated to it, which increases exponentially based on usage.

## Permissions

To use DM Connect for DI, you need certain permissions on erwin Mart Administrator and erwin Data Intelligence Suite (DI Suite).

#### **Minimum erwin Mart Permissions**

You can use DM Connect for DI only if your account has been assigned the following profiles:

- Administrator
- Architect

#### **Minimum erwin DI Suite Permissions**

Metadata Manager
Create System
Systems/System Tabs/View System Details
List Systems
Systems/Add Environment
Systems/List Environments
Systems/System Environments/Import Environment
Systems/System Environments/New Version
Systems/System Tabs/View Environment Details
Systems/Configure Expanded Logical Name
Systems/System Environments/Environment Tabs/Extended Properties/Edit Extended Prop-

erties

Systems/System Environments/Scan Metadata

Systems/System Environments/Environment Tabs/EnvironmentDetails

Mapping Manager
Projects/Create Project
Projects/Mappings/Create Mapping
Projects/Project Tabs/Project Details/View Project Details
rojects/Mappings/Mapping Grid/Edit Mapping Specification Grid
(Any one permission in child permissions)
Business Glossary Manager

Business closed y manager
Custom Objects/Catalog/Create
Custom Objects/Catalog/Edit
Custom Objects/Catalog/View
Custom Objects/Catalog/Custom Objects/Create
Custom Objects/Catalog/Custom Objects/Edit

Custom Objects/ Catalog/ Custom Objects/ Zait

Custom Objects/Catalog/Custom Objects/View

Custom Objects/Import Catalog

## erwin DI Suite DocumentsPath

To be able to export data from erwin Data Modeler (DM) to erwin DI Suite, ensure that you update the **iccdocuments.properties** file in erwin DI Suite as follows:

- Windows: If you change the default installation location, follow these steps:
  - Open the iccdocuments.properties file from the following location: Apache Software Foundation\Tomcat 8.5\webapps\<Application Name>\WEB-INF\configuration\properties\iccdocuments.properties
  - Change the **DocumentsPath** value to the current installation location: 

     </

For example, consider you changed the installation location from the default location

to: D:\Apache Software Foundation\Tomcat 8.5\webapps\erwinDISuite\WEB-INF\configuration\properties.

Then, change the **DocumentsPath** to: D:/erwinDISuite

Linux: Ensure that you follow these steps:

- Open the iccdocuments.properties file from the following location: /opt/tomcat/webapps/<<erwinDISuite>>/WEB-INF/configuration/properties/iccdocuments.properties
- Change the **DocumentsPath** value to: opt/tomcat/<application name>

For example, change the **DocumentsPath** from *C:/MappingManager* to: opt/tomcat/erwinDISuite

## Configuration

To use DM Connect for DI, you need to configure your erwin Data Intelligence Suite (DI Suite) application in erwin Mart Administrator. This is the application to which DM Connect for DI would export data models, data sources, and naming standards.

To configure erwin DI Suite, follow these steps:

1. Go to Application Menu > Configuration.

DI Configuration		
Server Name *	Application Name *	
Port*	Enable SSL	
- Username *	Password*	Ø
<ul> <li>Session Timeout*</li></ul>		
	RELOAD	SUBMIT

2. Configure your erwin DI Suite's connection parameters as follows:

Field	Description
Server Name	Specify the server address, where erwin DI Suite is installed.
Port	Specify the port on your server that is used for erwin DI Suite.
Application Name	Specify the name of your erwin DI Suite Application.
Enable SSL	Specify whether you want to connect to the server through a secured connection
Username	Specify your erwin DI Suite user name.
Password	Specify your erwin DI Suite password.
Session	Specify the erwin DI Suite's session time out duration in minutes.

Configuration

Timeout	
---------	--

3. Click Submit.

Your connection is tested and saved.

# Scenario: Schedule Jobs to Export Data Models to erwin DI Suite

A job converts a model to erwin DI Suite compatible format and then,

- exports the model to the Metadata Manager
- exports the source and target column data from a dimensional model into the Mapping Manager

Once source and target column data is exported, any updates made to them are not exported when the job runs again.

If the model has an associated NSM file, it exports the file to the Business Glossary Manager

For more information about data sharing between erwin Data Modeler (DM) and erwin Data Intelligence Suite (DI Suite), refer to the <u>Data Sharing</u> topic.

By default the DM Connect for DI module opens in the Calendar view. You can toggle the page view between the List View (=) or Calendar View (=) using the respective buttons on the page toolbar.

To schedule a job, follow these steps:

On the DM Connect For DI page, click a suitable calendar slot or click .
 The Schedule Job page appears.

Scenario: Schedule Jobs to Export Data Models to erwin DI Suite

Schedule Job			×
	DI INFORMATION	JOE	B INFORMATION
Select Models		۹	Count
<ul> <li>Mart</li> <li>Documents</li> <li>New Librar</li> <li>New Librar</li> <li>SQL</li> <li>Employee</li> <li>PhModel_S</li> </ul>	y y (1)		
Include NSM			NEXT >

2. Set up job parameters as follows: On the Catalog Information tab:

Select Models

Select models from mart catalog to export.

To view selected models, click **a**. The **Count** field displays the number of selected models.

#### Include NSM

Select whether naming standards must be exported.

A catalog named by the NSM file is created under **Business Glossary Manager** > DM NSM Files custom asset.



Ensure that the DM NSM Files asset is enabled in erwin DI Suite > **Business Glossary Manager Settings.** 

On the DI Information tab:

#### System Name

Enter a system name. This corresponds to System in Metadata Manager.

#### **Environment Name**

Use the predefined macros to set the environment name. This corresponds to Environment in Metadata manager.

For system and environment names, following special characters are allowed:



- System: (hyphen), \_ (underscore), and space
- **Environment**: @ (at sign), \$ (dollar sign), & (ampersand), / (slash mark), - (hyphen), \_ (underscore), and space All other special characters are replaced with (underscore).

#### **Export Options**

Select a suitable export option:

- Add New:
  - If an environment exists, this option adds any new tables or columns to it.
  - If an environment does not exist, this option creates an environment and adds tables and columns to it.

#### Scenario: Schedule Jobs to Export Data Models to erwin DI Suite

#### • Update Existing + Add New:

- If the existing model objects have changed, this option exports the updates to the existing model objects in erwin DI Suite.
- Also, it exports any new objects in the model to erwin DI Suite.

#### • Update Existing + Add New + Invalidate:

Along with the functionality of Update Existing + Add New option, this option invalidates any deleted tables or columns.

#### • Delete & Reload:

This option deletes all the tables and columns. Then, it exports them again.

#### Version

Select whether a version of an existing environment must be created. This archives the existing environment.

On the Job Information tab:

#### Job Name

Specify a job name.

#### Scheduled Job On

Select the date and time at which the job must run.

#### Job Interval

Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly.

#### Notify Me

Select whether a notification is sent to you when the job status changes. This enables the Notification Email and CC List fields.

#### **Notification Email**

Specify the email address at which you want to receive the notification.

#### CC List

Specify a semi-colon-separated list of email addresses that must receive the job notification

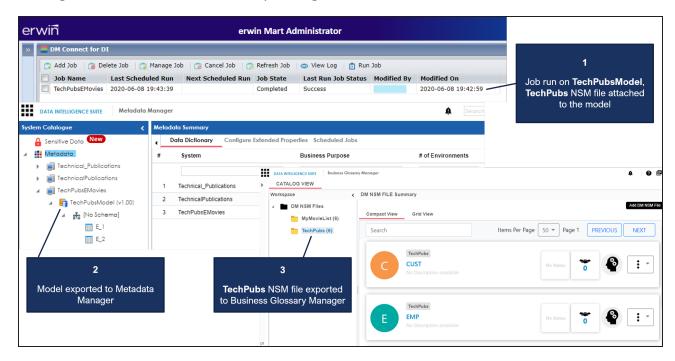
#### **Run Now**

Select the checkbox to run the job immediately.

#### 3. Click Submit.

The job is added to the calendar for execution with its **Job State** set to Scheduled.

The job runs according to the schedule and exports data model to Metadata Manager and naming standards to Business Glossary Manager.

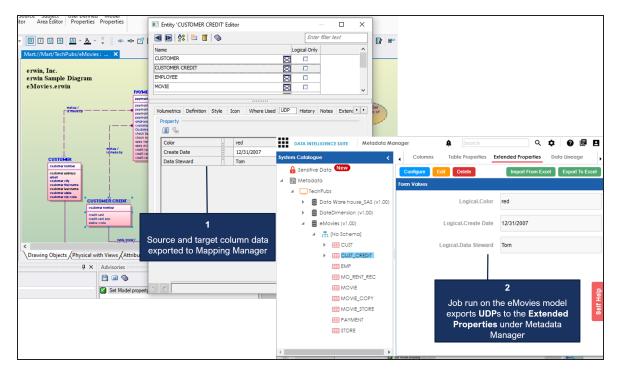


Database connection parameters such as DBMS Name/DSN, IP Address/Host Name, Port, and Business Entity Type (System Environment Type) are stored in environment details.

1	Data Dictionary	Environment Details	Extended Properties	Data Lineage	Impact as Source	Impact as Target	Mindmap
	Workflow Status						>>
	System Environment Name*	Demo	_SQS2019_REDB_DISV11	Driver Name*	•	the second second	
	System Environment Type	erwin	DM Mart - SqlServer	DBMS Name	/DSN*	disv11	
	Data Steward			IP Address/H	ost Name*	localhost	
	Server Platform			Port**			
	Server OS Version			User Name*		-	
	File Management Type			Password*		1////	///
	File Location			Url*		(////	///

Scenario: Schedule Jobs to Export Data Models to erwin DI Suite

Also, the UDPs and validation rules in the model are exported to the Extended Properties tab in Metadata Manager.



## Case I: Run Job

The Run Job option immediately runs a job. This option works only if the selected job is a recurring job in the scheduled state.

## Case II: Modify Job

The Manage Job option lets you modify an existing scheduled job. If you modify a job:

- before its run schedule, the changes take effect when the job runs
- while it is running, the job is cancelled, and changes are saved. They take effect when the job runs next time.
- after it is past its schedule, the job runs according to the new schedule

## **Case III: Recurring Job-No Change in Models**

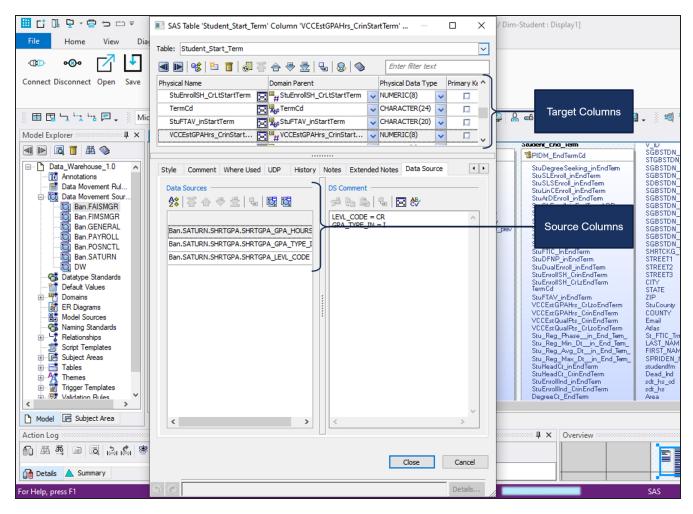
Recurring jobs run based on the Job Interval you set while scheduling them. If the models selected in the job have not changed between job intervals, the job still runs according to the schedule. However, no data is exported to erwin DI Suite.

## **Case IV: New Model in the Folder**

If a new model is added to an existing folder on which a recurring job has been scheduled, DM Connect for DI auto-syncs it to the job. The new model in included in the job auto-matically, when the job runs next.

# Scenario: Import Source and Target Data into Mapping Manager

In case of dimensional model that has associated data sources, DM Connect for DI exports the source and target column data from the model into the Mapping Manager.



Schedule a job on your dimensional model. Once the job is completed successfully, DM Connect for DI creates a project. Under this project, it creates a mapping specification with the source and target column data from your model.

#### Scenario: Import Source and Target Data into Mapping Manager

er	rwiñ		erwin	Mart A	dmir	istrator					1	
»	DM Connect for DI										Job run	on a
	📑 Add Job 🛛 👩 Delete Job	👩 Manage Job 🛛 🌀 Can	cel Job   👩 Refresh Job	💿 View	Log	💼 Run Job					Dimensiona	l model,
	Job Name	Last Scheduled Run	Next Scheduled Run	Job S	ate	Last Run Job	Status	Modified By	Modified On		with associa	ted Data
1		2020-06-08 20:13:16		Compl		Success		mmacharla	2020-06-08 20:11:50		Sourc	es
	DimensionalModel	2020-06-08 19:43:39	2020-06-08 09:15:00	Sched	ıled	Success		mmacharla	2020-06-08 19:42:59			
			DATA INTELLIGENCE SUITE	Mapping	Manag	er					🏚 Sea	rch
		Works	pace Mappings	-	•	Mapping Specific	ation (	Graphical Desig	ner Test Specification	Workflow	log	•
			Mappings		2	) 😒 🔳 🧔 (D	ata_Ware_hou	se_\$A\$ _1]	Profiles: Defa	lt	💌 🏟 💐	2 < 2
			Projects Data_Ware_house_SA	(S_1_prc	*	Source System Name	Source Environmen Name	Source 1 t Name	able Source Column Name	Source Column Data Type	n Source Column Length	Business Ru
	2		Test Cases Cases Mappings Data_Ware_ho		1	OPROD	ban- prod.valenci	acc.e	SGBSTDN_ADMT_	VARCHAR2(2)		
	Source and target colu exported to Mapping N		⊕ MappingTa	rgets	2	OPROD	ban- prod.valenci	acc.e SGBSTDN	SGBSTDN_EXP_GF	. DATE		
					3	OPROD	ban- prod.valenci	acc.e SGBSTDN	SGBSTDN_SECD_F	VARCHAR2(1)		•
Í					•							•
							< <	Records from	n 1 to 100 🔹 🔰 🧯	Poge 1 😱	100 rows per page	•

## **Scenario: NSM Files**

If the models selected in a job have NSM files associated with them, DM connect for DI exports them to the Business Glossary Manager under the custom asset, erwin DM NSM.

Ensure that the erwin DM NSM asset is enabled under erwin DI Suite > Business Glossary Manager Settings. ▦ 0 🖻 🖪 DATA INTELLIGENCE SUITE Business Glossary Manager Settings ASSET TYPES ASSOCIATIONS & RELATIONSHIPS OTHER CONFIGURATIONS DM NSM Asset **BUSINESS ASSETS** Asset Details Catalog BT Business Terms Name<sup>1</sup> erwin DM NSM **Business Policies** DM NSM Asset Title\* 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 BR 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 Name in Metadata Manager. erwin DM NSM SG Stewardship Goals #F6C65B Color Documents Required Enable Asset Select Enable Asset Enable Definition V Enable Sensitivity Fields 4.0 Display Order Image

Under the erwin DM NSM asset, each unique NSM file is added as a catalog.

#### Scenario: NSM Files

	erwin Mart Administrator				🎗 mmacharla 🍷   LO	GOUT   😯 Help	
DM Connect for DI							
Add Job 👔 Delete Job	Manage Job Cancel Job Refresh		Run Job	Modified By	Modified On		
TechPubsDept	2020-06-15 18:30:	00 Scheduled		mmacharla	2020-06-15 05:52:23		1
BUSINESS ASSETS	CATALOG VIEW Workspace	M NSM ASSET Su	1000 3.07				h 2 models; 2 NSM Movies.nsm and
BT Business Terms	erwin DM NSM	Compact View	Grid View				uistABBV.nsm
BP Business Policies	eMovies (5)	Search	Gild View	Items F	Per Page 50 🔻 Pa	ge 1 PRE	
BR Business Rules							
ED erwin DM NSM			eMovies CUST		No Sta	tus 0	🚳 🗄 -
SG Stewardship Goals	2		No Description available				
	<ul> <li>2 catalogs based on the NSM files attached to the models are created.</li> <li>Glossary words from each files are added to the respective catalogs.</li> </ul>		eMovies EMP No Description available		No Sta	tus 0	ê :·

## Case I: One NSM File, Multiple Models

In a job, if a single NSM file is associated with multiple models, a single catalog is created for both models. The contents of the corresponding catalog under the erwin DM NSM asset type in Business Glossary Manager are overwritten.

## Case II: Multiple NSM Files, Multiple Models

In a job, if multiple NSM files are associated with multiple models, multiple catalogs, corresponding to the NSM files are created under the erwin DM NSM asset type in Business Glossary Manager.

## **Scenario: View Logs**

After a job runs, you can view its log to understand more about the job status. In case of failures, you can then troubleshoot using the logs.

To view a job's log, select a job and click **View Log**.

Home / DM C	onnect for DI				<b>ē Ž</b>	
	JobName	Last Schedule Run	Next Schedule Run	Job State	Last Run Job Status	Modified By
	REDB_SQS2019_DISV11	2022-01-25 18:50:51	2022-01-27 18:50:00	Scheduled	Success	Select a job and click
	View Logs					here to view its log
	[25/01/22 06:50:42:042 IST [25/01/22 06:50:42:042 IST					
	[25/01/22 06:50:42:042 IST]	12_REDB_SQS2019_DISV11 12_REDB_SQS2019_DISV11 12_REDB_SQS2019_DISV11		export		
	ownerName ::Mart/SQS201 [25/01/22 06:50:42:042 IST]	9_REDB_DISV11	: 65558=> Evaluated Enviroment N : 65558=> Start Report File Genera : Entering Query ReportAPI		REDB_DISV11, modelName ::	SQS2019_REDB_DISV11,

## **Reference: Data Sharing between erwin DM and erwin DI** Suite

For data to be shared between erwin Data Modeler (DM) and erwin Data Intelligence Suite (DI Suite), the attributes and properties of objects in both the applications must correspond to each other. Refer to the following tables to understand how erwin DM Connect for DI maps data between applications.

LIBRARY-SYSTEM					
erwin Data Modeler	erwin DI Suite				
Library/Catalog Name	System Name				
Description	Business Purpose				

MODEL-	ENVIRONMENT
erwin Data Modeler	erwin DI Suite
Model Name	System Environment Name
Model Type	System Environment Type
Version	Version
Description	Intended Use Description

TABLE-TABLE				
erwin Data Modeler	erwin DI Suite			
Model Name	Environment Name			
Library Name	System Name			
Entity Name	Logical Table Name			
Comment	Table Comments			
Schema_Name	Schema			

COLUMN-COLUMN			
erwin Data Modeler	erwin DI Suite		
Domain Parent	Data Domain		
Physical Data Type	Data Type, Precision, Length, Scale		
Null Option	Nullable Flag		

#### Reference: Data Sharing between erwin DM and erwin DI Suite

Foreign Key	Foreign Key Flag	
Primary Key	Primary Key Flag	
Child Column Name	e Foreign Key Column Name	
Child Table Name	Foreign Key Table Name	

UDP-EXTENDED PROPERTIES			
erwin Data Modeler	erwin DI Suite		
UDP Name	Key Name		
Value	Value		
Description	Description		

NSM-erwin DM NSM		
erwin Data Modeler	erwin DI Suite	
NSM File Name	Catalog Name	
Abbreviation	Asset Name	
Glossary Word	Definition	



NSM files have multiple parameters. However, DM Connect for DI is con-figured to push only the Glossary Word and Abbreviation to erwin DI Suite.

DATA MOVEMENT SOURCE-MAPPING		
erwin Data Modeler	erwin DI Suite	
Data Source DBMS Type	Database Type	
DS Transformations	Business Rule	
Library	Target System	
Model	Target Environment	
Table	Target Table	
Column	Target Column	
Datatype and Length	Target Column Datatype and length	
Source Library (Or Data Source Name)	Source System	
Source Model (Or Data Source Server)	Source Environment	
Source Table (Or Data Move-	Source Table	

#### Reference: Data Sharing between erwin DM and erwin DI Suite

ment Table)		
Source Column (Or Data Move- ment Column)	Source Column	
	Source Column Datatype and length	
Source Column Datatype ( Or Data Movement Column Data- type)	Þ	Check whether datatype and length are added to the corresponding fields. If not, you need to correct it manually.

## Limitations

The following list summarizes the limitations of erwin DM Connect for DI.

- If table's or column's Definition property is updated in a model, the update is not exported when the job is run again. To export the updated Definition, set the job's Export Options to Delete & Reload.
- When you apply an NSM file to a model, it is applied at the model-level. Therefore, it is applied to all versions of the model.