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# Mart Architecture

erwin Mart Portal is the front-end web application for erwin Mart Portal and enables communication between erwin Data Modeler and erwin Mart Portal. The following sections explain the architecture of both erwin Mart flavors, on premises and on cloud.

## erwin Mart on Premises

erwin Mart Portal architecture follows a JAR-based, multi-product structure.

The Mart comprises the following components:

### Database

Stores the user data for the Workgroup Edition. You can use Oracle, SQL Server, or PostgreSQL databases for the Mart database. You must use a new database and not an existing database that was created for an older version of the data modeling tool. For more information on database versions, refer to the [System Requirements](#) topic.

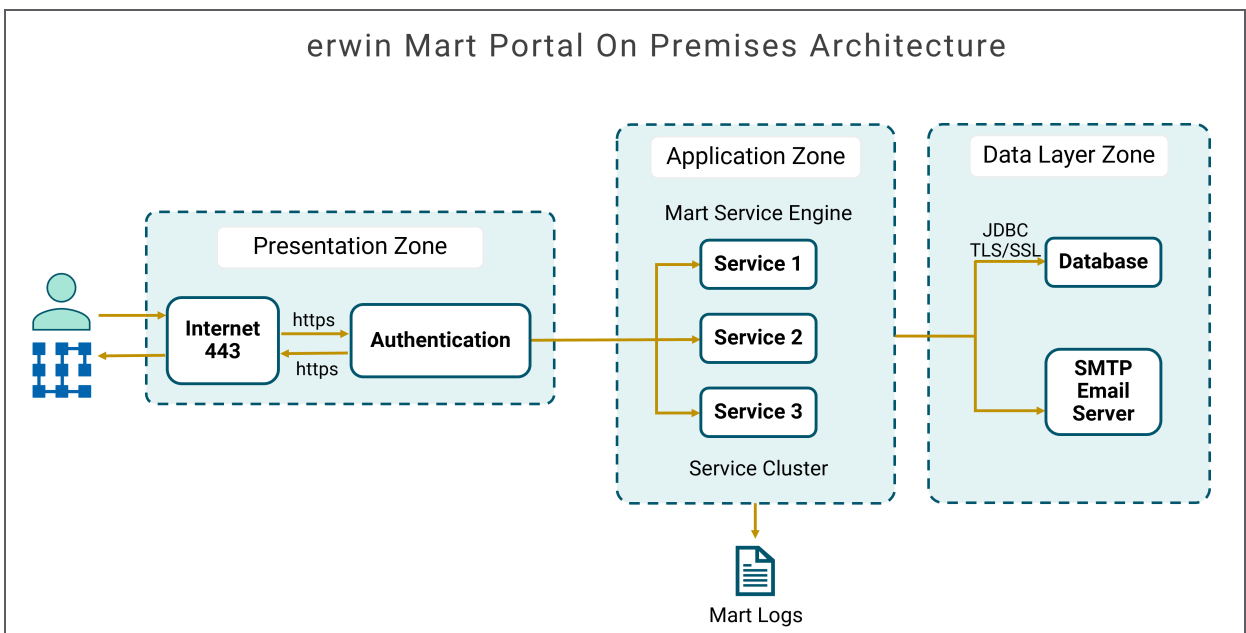
### Applications

Includes a web-based component named erwin Mart Portal that helps you manage the Mart through a web console.

### Web server

Hosts erwin Mart Portal. You can use a web server of your choice. If you have not installed a web server, use the erwin Mart Portal option and install Tomcat.

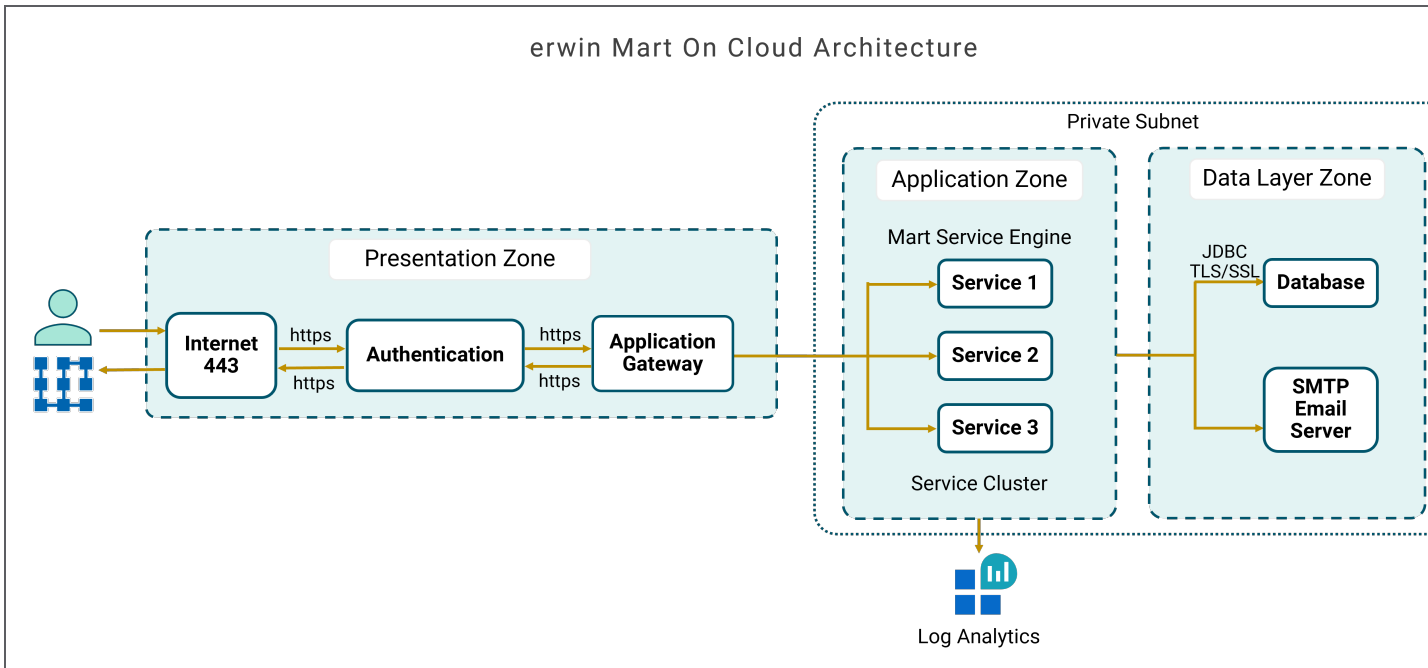
The following diagram explains erwin Mart Portal architecture:



[Back to Top](#)

## erwin Mart on Cloud

erwin Mart on Cloud has a three-layered architecture consisting of Presentation, Application, and Data layers. The following diagram explains the architecture.



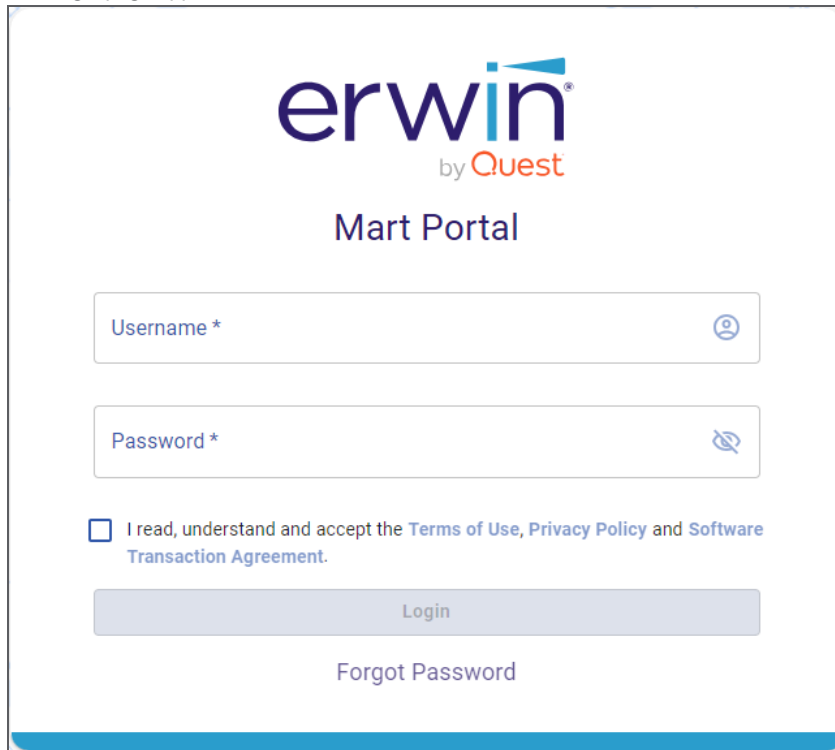
# User Interface

To get you started with using erwin Mart Portal, this topic walks you through its UI, components, and their functions.

Once you have installed and configured erwin Mart Portal, follow these steps to access and use it:

1. Open erwin Mart Portal.

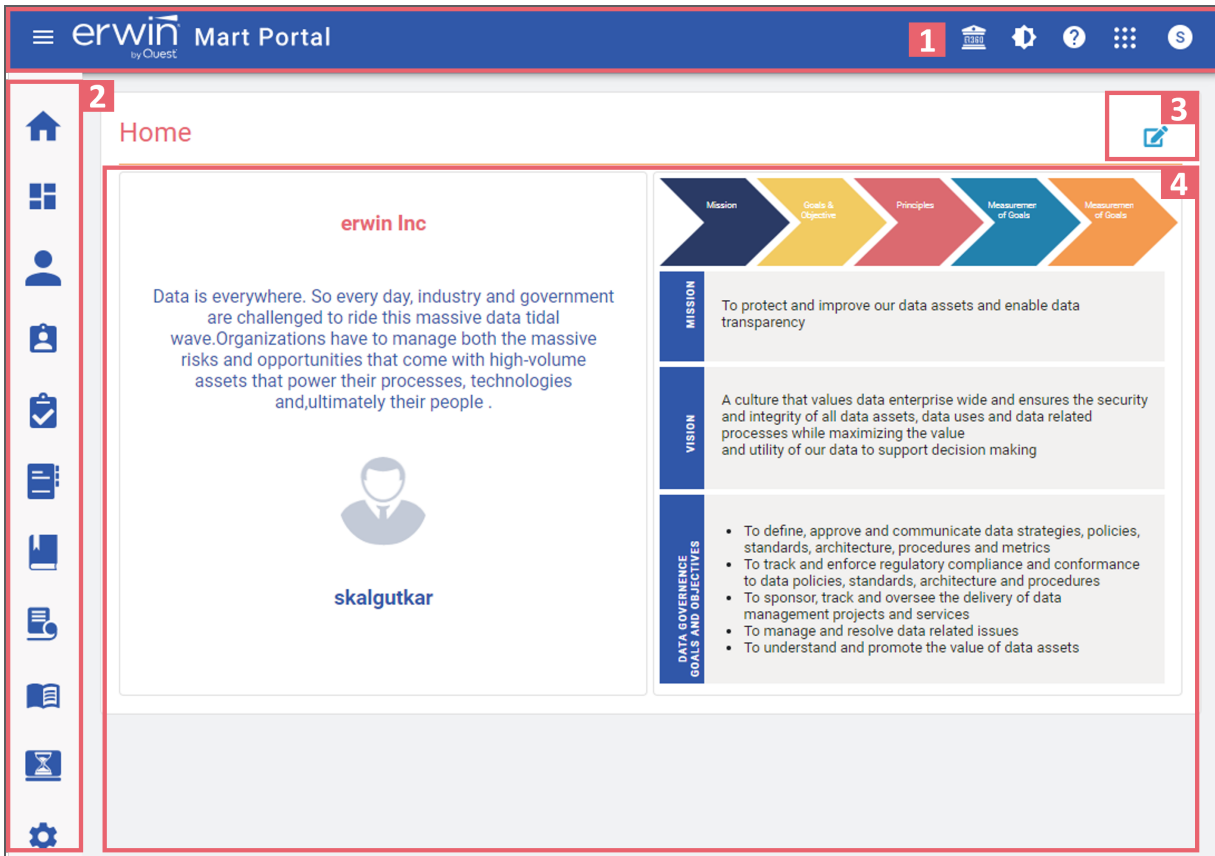
The Login page appears.








The screenshot shows the login interface for the erwin Mart Portal. At the top center is the logo for 'erwin by Quest', with 'erwin' in dark blue and 'by Quest' in orange. Below the logo is the title 'Mart Portal' in dark blue. There are two input fields: 'Username \*' and 'Password \*'. The 'Username' field has a user icon on the right, and the 'Password' field has an eye icon on the right. Below these fields is a checkbox with the text 'I read, understand and accept the Terms of Use, Privacy Policy and Software Transaction Agreement.' Below the checkbox is a light blue 'Login' button. At the bottom center is a link for 'Forgot Password'. The entire form is enclosed in a thin blue border with a blue gradient bar at the bottom.



2. Enter your erwin Mart Portal credentials.
3. Click **Login**.

Click **SingleSignOn/SSO** if you use an SSO-enabled account.

After successful log in, the Home page appears.



UI Section	Function
1-Header Pane	 <b>Application Menu:</b> Click this icon to expand the menu and access modules.
	 <b>ER360:</b> Click this icon to open erwin ER360.
	 <b>Toggle Light/Dark Theme:</b> Click this icon to switch between dark and light modes of the UI.
	 <b>Help:</b> Click this icon to view the help topic corresponding to the current page.
	 <b>Apps:</b> Click this icon to access apps.
	 <b>Access Token:</b> Click this icon to generate access token for REST reports.
	 <b>REST Report:</b> Click this icon to navigate to the <a href="#">REST reports feature</a> .

UI Section	Function
	<p>You can generate REST reports only if you are a Server user.</p> <p> <b>Harvest to ER360:</b> Click this icon to schedule a job to <a href="#">harvest catalogs to erwin ER360</a>.</p> <p>You can harvest catalogs to erwin ER360 only if you are an administrator.</p>
	<p> <b>User Account:</b> Click this icon to view account information, upload an account picture, change password, or log out.</p> <p>For erwin Mart on Cloud, the Change Password button is available only if your user account has the View User permission.</p>
2-Menu	Use this pane to access modules.
3-Page Toolbar	Use the buttons on this toolbar to perform tasks relevant to each module.
4-Work Area	Use this area to work on tasks relevant to each module.













# Home

The Home page is a configurable wiki-like landing page, where you can display key information for business users, important images, hyperlinks, text, and more.

erwin

by Quest



Mart Portal



Home

erwin Inc

Data is everywhere. So every day, industry and government are challenged to ride this massive data tidal wave. Organizations have to manage both the massive risks and opportunities that come with high-volume assets that power their processes, technologies and, ultimately their people .



Mission

Goals & Objective

Principles

Measurement of Goals

Measurement of Goals

MISSION

VISION

DATA GOVERNANCE GOALS AND OBJECTIVES

To protect and improve our data assets and enable data transparency

A culture that values data enterprise wide and ensures the security and integrity of all data assets, data uses and data related processes while maximizing the value and utility of our data to support decision making

- To define, approve and communicate data strategies, policies, standards, architecture, procedures and metrics
- To track and enforce regulatory compliance and conformance to data policies, standards, architecture and procedures
- To sponsor, track and oversee the delivery of data management projects and services
- To manage and resolve data related issues
- To understand and promote the value of data assets

To configure the Home page, follow these steps:

1. Click .

## Home


Write


Preview


H


I


B

















```
<html>
  <body>
    <div class="home">
      <div class="leftBox">
        
      <h3 class="company"><a href='https://www.erwin.com' target="_blank">erwin Inc</a></h3>
      <p class="descText" >
        Data is everywhere. So every day, industry and government are challenged to ride this
        massive data tidal wave. Organizations have to manage both the massive risks and
        opportunities that come with high-volume assets that power their processes, technologies and,
        ultimately their people.
      </p>

      <p>
        <span class="fa-stack fa-3x" >
          
        </span>
      </p>
      <h3 class="userName" ></h3>
    </div>
    <div class="rightBox">
      <div id="gdprBox">
        <div class="breadcrumbBox">
          <ul class="arrowBreadcrumbs">
            <li class="arrowitem"><a href="#" class="mission_BC"><span class="arrowinnerTxt"> Mission &<br/> Vision <br/>Statement</span></a></li>
            <li class="arrowitem"><a href="#" class="goals_BC"><span class="arrowinnerTxt"> Goals &<br/> Objective</span></a></li>
            <li class="arrowitem"><a href="#" class="principles_BC"><span class="arrowinnerTxt">Principles</span></a></li>
            <li class="arrowitem"><a href="#" class="measure_BC"><span class="arrowinnerTxt">Measurement<br/> of Goals</span></a></li>
            <li class="arrowitem"><a href="#" class="checkout_BC"><span class="arrowinnerTxt"> Governance<br/> Stakeholders</span></a></li>
          </ul>
        </div>
      </div>
    </div>
  </body>
</html>
```

RESET


CANCEL

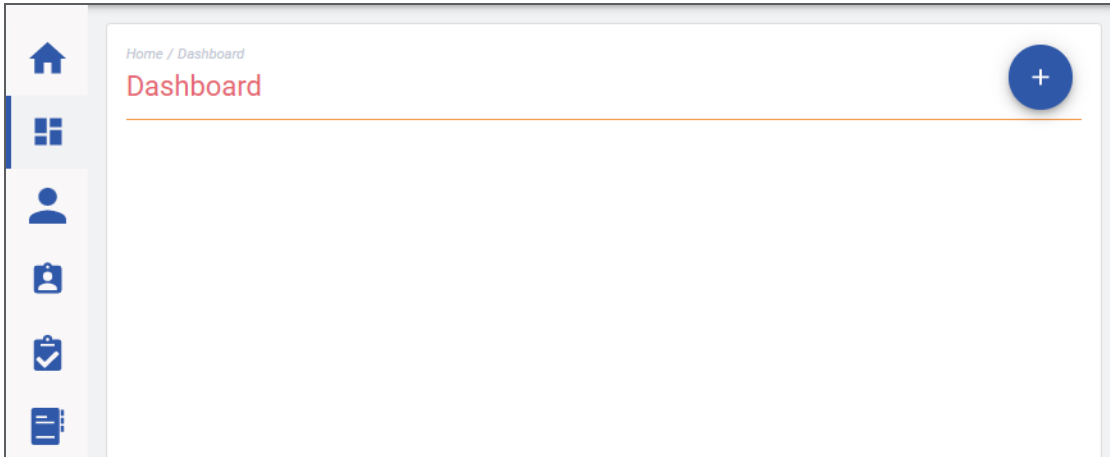
2. On the **Write** tab, use HTML syntax to edit the page.
3. Click **Preview** to preview your changes.
4. Click **Save**.

To revert the changes that you made, click **Reset**.


# Dashboard

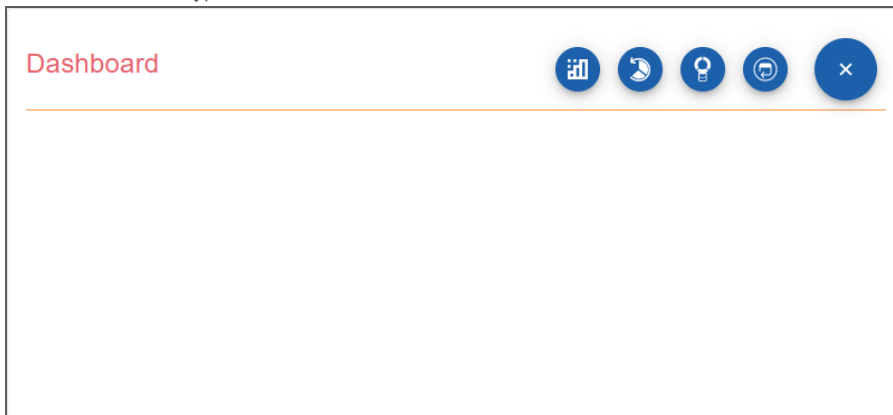
The configurable dashboard enables you to add and view a pictorial presentation of your data and actions on the Mart. You can add charts for your data footprint, model overview and history, profile data, and session overview.

To access dashboard, on the menu, click  **Dashboard**. The Dashboard page appears. By default, the dashboard does not have any charts added to it.



To add charts, follow these steps:

1. On the Dashboard page, click  .  
The available chart types slide out.



2. Click one or all chart types:



Data Footprint

Use this chart to view the type of data that you have in your catalogs.



### Model History

Use this chart to view model history in terms of when they were added and updated.



### Profile User Data

Use this chart to view user count under each profile type.

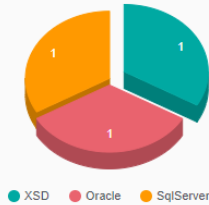


### Session Information

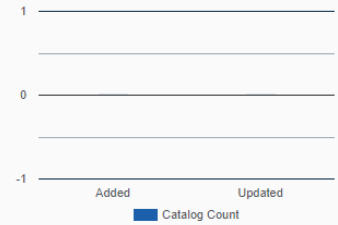
Use this chart to view the number of active, inactive, and closed sessions.

Charts are added to the Dashboard.

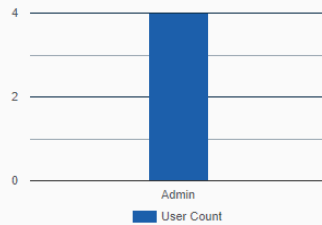
## Dashboard



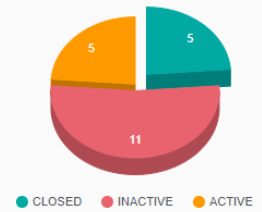
Data Footprint



Model History Added, Version



Profile User Data



Session Active/Inactive/Cancel

# Character Limitations

There is a limitation on the number of characters you can use for certain Mart Portal parameters. The following table gives information about such parameters:

Parameter/Field	Character Limitations
Username	450 (Server User, Windows User, and Group) Also, refer to the special character limitations below. For international OS (I18N), if the character set being used is Double byte Character Set (DBCS) then the character limit is 225.
Password	130
Email Address	130 Also, refer to the special character limitations below.
Profile Name	130
Profile Description	2000
Catalog Name	255
Catalog Description	4000

Apart from the above character limits, for username and email address, following are the permitted special characters:

Parameter/Field	Permitted Special Characters	
Username	<b>Server User for Mart Portal:</b> . (dot), _ (underscore), - (hyphen), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark), ` (back tick) <b>Windows User for Mart Portal:</b> \ (backslash), . (dot), _ (underscore), - (hyphen), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark), ` (back tick),  (pipe), {}(flower brackets) <b>Group User:</b> . (dot), _ (underscore), - (hyphen), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark), + (plus), % (percent)	<b>Server User for ER360:</b> . (dot), _ (underscore), - (hyphen), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark), ` (back tick),  (pipe), {} (flower brackets) <b>Windows User for ER360:</b> \ (backslash), . (dot), _ (underscore), - (hyphen), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark), ` (back tick),  (pipe), {}(flower brackets)
Email Address	<b>Server User for Mart Portal:</b> @ (at sign), - (hyphen), % (percent), _ (underscore), + (plus), . (dot), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark)	<b>Server User for ER360:</b> @ (at sign), - (hyphen), % (percent), _ (underscore), + (plus), . (dot), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark)

Parameter/Field	Permitted Special Characters	
	<p><b>Windows User for Mart Portal:</b> @ (at sign), % (percent), + (plus), . (dot), _ (underscore), - (hyphen), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark)</p> <p><b>Group User for Mart Portal:</b> . (dot), - (hyphen), %(percentage), _ (underscore), +(plus), @(at the rate)</p>	<p><b>Windows User for ER360:</b> @ (at sign), % (percent), + (plus), . (dot), _ (underscore), - (hyphen), ~ (tilde), ^ (carat), # (hash), ! (exclamation mark)</p> <p><b>Group User for ER360:</b> . (dot), - (hyphen), %(percentage), _ (underscore), +(plus), @(at the rate)</p>

# Log In to erwin Mart Portal and Configure Settings

After the Mart is initialized, the user who initialized must log in first. When you log in for the first time, configure it according to your requirements. You can configure the following settings:

- Default profile for the model creator
- Default selector for user
- Email notification
- Device tracking


To log in to mart, follow these steps:

1. On the Windows Start Menu, click **erwin > erwin Mart Portal**.

The log in page appears.

2. Enter the credentials with which you initialized the mart and log in.

If you enter an incorrect password five consecutive times, your account will be locked for five minutes (300 seconds) by default. To change the default lock out time, refer to the Change [Default Account Lockout Duration](#) section.

3. On the application menu, click .
4. Complete the following fields:

Default profile for model creator

Specifies the profile that is assigned to a user on a model. This profile is assigned whenever a user creates a model and saves it to Mart for the first time. The user inherits the permissions of the default profile selected here on the model that is saved. For example, suppose that User1 is assigned with Modeler profile and the System Administrator selects Architect as the default profile for model creator. If User1 creates Model1 and saves it to Mart, for Model1, User1 inherits the permissions of Architect. Now, suppose that the System Administrator selects Viewer as the default profile for model creator, and suppose that User1 creates Model2 and saves it to Mart. For Model2, User1 inherits the permissions of Viewer.

Default Selector for User

Specifies whether the default display selector for users is username, email address, or both. Based on the settings here, users' username and/or email is displayed in the Permissions module.

Use SMTP Settings

Specifies whether SMTP settings are configured for email notification through the application.

SMTP host name

Specifies the name of the SMTP host. Enter the name in the mail.domain.com format. Notification emails are sent from this server.

Port number

Specifies the port number of the SMTP server. The default port number is 25. If your company is using an alternate port number for the mail server, specify that port number.

Authenticate

Specifies whether transactions with the SMTP server are authenticated. Select the check box to authenticate.

#### Use TLS Connection

Specifies whether transactions with the SMTP server use a Transport layer Security (TLS). If you intend to use a TLS connection, ensure that the User name and Administrator email correspond to each other.

Select this option only if you want to use a TLS connection.

#### Username

Specifies the user name to authenticate the SMTP server. Select the Authenticate check box to enable authentication.

#### Password

Specifies the password to authenticate the SMTP server. Select the Authenticate check box to enable authentication.

#### Administrator email

Specifies the email ID of the Mart administrator. Notifications to Mart users are sent from this ID.

#### No-reply email from


Specifies the email ID from which administrative emails such as the password reset email are sent.

#### Enable Device Tracking

Specifies whether the devices on which you log in to your mart account are tracked and logged.

#### 5. Click **Submit**.

Mart options are configured.

If SMTP server is not configured, an Administrator can reset a user's password manually via the Users Page. On the Users page, select a user and click . Enter a new password and click **Submit**.

Ensure that you log in to Mart Portal through the localhost. You cannot log in from the remote machine.

To log in, from the Windows Start menu, click **erwin > erwin Mart Portal**.

To log in as a Windows-authenticated user, follow these steps:

This procedure describes how to enable a Windows-authenticated user log in to a Mart that is already initialized. Use this procedure if the Mart is initialized with either a server user or a Windows-authenticated user.

1. In erwin Mart Portal configuration, on the Authentication tab, ensure that you have provided Active Directory details.
2. While adding users, search and add the required user corresponding to the necessary Windows user.

Now, the Windows-authenticated user can log in to erwin Mart Portal by providing the user name in the <domain name>/<user name> format.

A local Windows user who does not belong to an Active Directory group cannot log in to the Mart as a Windows user.



# Mart Users

Starting release 9, you can add individual users and Active Directory user groups to Mart. Individual users are categorized as Server users and Windows users, which are based on the way they are authenticated. There are no database level users in the current Mart.

Following are the user types:

## Server User

Indicates a user that is authenticated by the Mart Portal. The server user is an application level user and not a database user. A server user provides the user name and password to log on to Mart. For example, Peter is a Business Analyst and reviews data models. Add Peter as a Server user as he accesses Mart only at the time of reviewing data models. Peter provides his user name and password to connect to Mart.

Only a Server user can access erwin Mart Portal. There are no database level users in the current Mart.

## Windows User

Indicates a user that is authenticated by the Windows network.

If you have configured Azure Active Directory (AD) in erwin Mart Portal configuration, while adding users, you can search and select users associated with the necessary Windows users. Such users can then log in to erwin Mart Portal using their Azure AD log on names. For example, AZUREAD\abd@MyOrg.com or AZUREAD\abc or abc@MyOrg.com.

To log into erwin Mart Portal using the domain/username, windows users have to be a part of an active directory group that has already been configured in your erwin Mart Portal configuration.

## Group User

Indicates a user group that is part of an Active Directory. Use this option to add an entire group that accesses Mart. For example, you have a user group ABC-Domain\XYZDivision\_AllModelers@MyOrg.com. Add XYZDivision\_AllModelers, so that all users that are part of this group and are authenticated by ABC-Domain, connect to Mart. Users of this group do not have to provide their user name and password when they connect to Mart.

For erwin Mart on cloud, to add group users, upload a list of users (for example, LDAP users) in the CSV format.

## Azure AD User

Indicates a user that is authenticated by the Azure Active Directory.

## Azure AD Group User

Indicates a user group that is authenticated by the Azure Active Directory.

Use this option to add an entire group that accesses Mart. Users of this group do not have to provide their user name and password when they connect to Mart.

A password should fulfill the following criteria:

- Contains at least 1 lowercase character
- Contains at least 1 uppercase character
- Contains at least 1 number
- Is minimum 6 characters in length
- Is maximum 130 characters in length

Apart from the above criteria, special characters are optional.

Also, if you enter an incorrect password five consecutive times, your account will be locked for five minutes (300 seconds) by default.

You can change the time for which the account stays locked. For more information, refer to the [Default Account Lockout Duration](#) section.

# Manage Users

As a Mart Portal, you can add or delete users, and reset passwords. Before adding users, it is necessary to understand the available [user types](#).

To add users, follow these steps:

1. Go to **Application Menu > Users**.

The Users page appears.

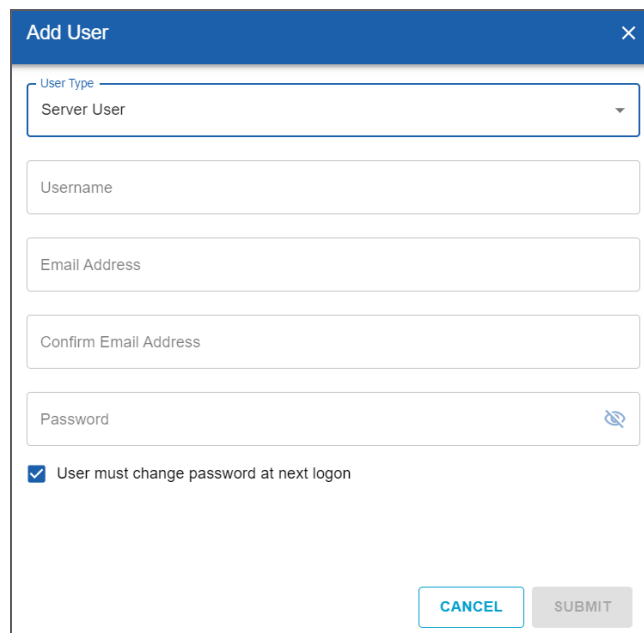
Home / Users

Users

<

2. Click .

The Add User page appears.



Add User

User Type

Server User

Username

Email Address

Confirm Email Address

Password

☒ User must change password at next logon

CANCEL

SUBMIT

3. Select one of the user types:

User Type	Description	Additional Information
Server User	Indicates a Mart user that is authenticated by the credentials provided in Mart. This is an application-level user and not a database user.	There are no database-level users in erwin DM Version 9 Mart.
Windows User	Indicates a Mart user that is authenticated by the Windows network	
Group User	Indicates a Windows user group	This means that all users that are part of the selected group can access Mart. To log in as a Group User, use your Group User's email ID.
Azure AD User	Indicates a Mart user that is authenticated by the Azure Active Directory network	
Azure AD Group User	Indicates a user group that is authenticated by the Azure Active Directory	

4. Based on the user type, enter values to the following fields:

Field	Description	Additional Information
Username	Specifies the name to use to login	This field applies to Server and Windows users.
Password	Specifies the password of the user.	<p>This field applies to Server users.</p> <p>A password must fulfil the following criteria:</p> <ul style="list-style-type: none"><li>• Contains at least 1 lowercase character</li><li>• Contains at least 1 uppercase character</li><li>• Contains at least 1 number</li><li>• Is minimum 6 characters in length</li><li>• Is maximum 130 characters in length</li></ul> <p>Apart from the above criteria, special</p>



Field	Description	Additional Information
		characters are optional.
Email Address	Specifies the email address associated with the user account	
Confirm Email Address	Specifies the email address again to confirm	This field applies to Server and Windows users.
User must change password at next logon	Specifies that the users get a change password screen when they log in next time to Mart Admin	This field applies to Server users. This is an optional field.
Load type option	Specifies whether all or partial groups are loaded in the user groups list	This field applies only to erwin Mart on premises for a Group User <ul style="list-style-type: none"> <li>• <b>Partial Load:</b> Selecting this option loads groups in the Group Name field based on the search keyword.</li> <li>• <b>Full Load:</b> Selecting this option loads all available groups in the Group Name field.</li> </ul>
Group name	Specifies the group name to which a user belongs	This field applies only to erwin Mart on premises for a Group User
LDAP file upload option	Specifies a list of users (for example, LDAP users) in the CSV format	This field applies only to erwin Mart on Cloud for a Group User.
Group Users	Specifies the identifier of the group that you want to add	This field applies only to Group users.

5. Click **Submit**.

The user account is added, and an email is sent to the user.


Note: Ensure that SMTP settings are configured.

To delete users, do one of the following:

- In the users list, for a user that you want to delete click  under the Actions column.
- Select multiple users and click  on the actions bar.

When a user is deleted, the models and objects that the user created are retained.

You cannot delete the user that is currently logged in.

To reset server user's password, select the required users and click . Enter a new password and click **Submit**.

- If you have configured an SMTP server for emails, new passwords are generated and sent to the registered email address.
- In the absence of an SMTP server for emails, the password is reset to the password that you enter on the Reset Password screen. No email is sent automatically.
- In the absence of an SMTP server for emails, if users forget their passwords, they cannot use the Forgot Password link on the Login Page. Use this option and reset the passwords manually.

If you enter an incorrect password five consecutive times, your account will be locked for five minutes (300 seconds) by default. You can change the time for which the account stays locked. For more information, refer to the [Log In to erwin Mart Portal and Configure Settings](#) topic.

## Best Practices to Add a Group User

The following are the best practices to add a Group User:

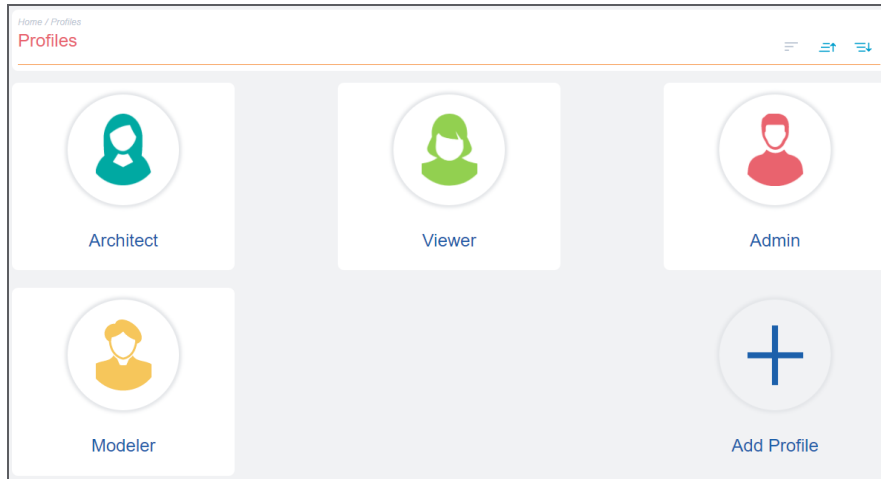
- Suppose that you have a parent group that includes subgroups. To give access to all the subgroups under a parent group, add the parent group as a Group User.
- Suppose that you want to give generic permissions to all users of a parent group and specific permissions to a subgroup. Add both, the parent group and the subgroup and give specific permissions to the subgroup. The permissions given to a subgroup take precedence over the permissions given to a parent group.
- Suppose that you want to give generic permissions to a group and specific permissions to a particular user of the group. Add the group and add the particular user as a Windows user. The permissions given to a Windows user take precedence over the permissions given to a group user.

# Manage Profiles

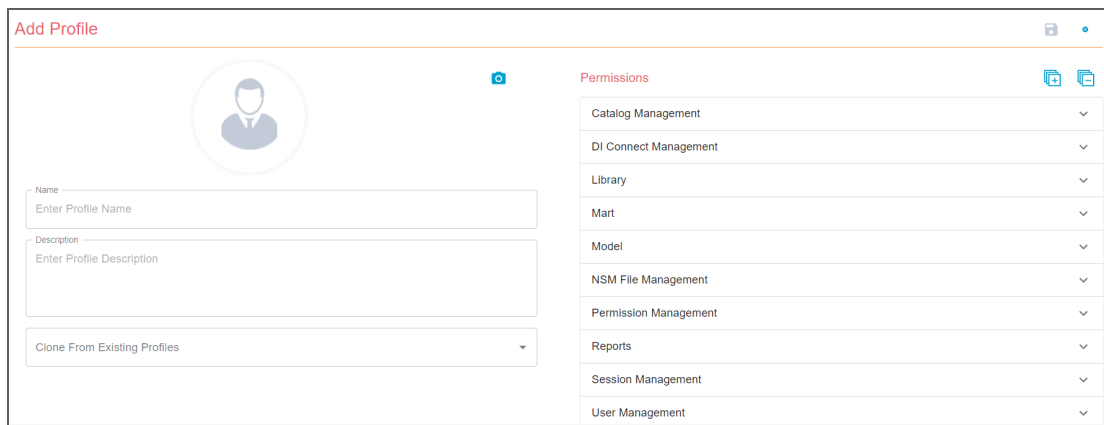
As an administrator, you can assign a user to a profile to control the actions that the user can perform on an object. You can assign a user to multiple profiles and give the user a greater control over objects. Assign at least one profile to each user. However, you do not need to assign all users to a profile immediately after creating the Mart. When you install Mart, Admin, Architect, Modeler, and Viewer profiles are created.

To add users, follow these steps:

1. Go to **Application Menu > Profiles**.  
The Profiles page appears.



2. Click **Add Profile**.  
The Add Profile page appears.

The screenshot shows the 'Add Profile' page. On the left, there is a profile card with a placeholder icon. Below it, there are two text input fields: 'Name' with the placeholder 'Enter Profile Name' and 'Description' with the placeholder 'Enter Profile Description'. Below these fields is a dropdown menu labeled 'Clone From Existing Profiles'. On the right, there is a 'Permissions' section with a list of permissions, each with a dropdown arrow: 'Catalog Management', 'DI Connect Management', 'Library', 'Mart', 'Model', 'NSM File Management', 'Permission Management', 'Reports', 'Session Management', and 'User Management'. The page has a light gray background and a top bar with the title 'Add Profile'.



3. Select or enter values to the following fields:



Field	Description
Name	Specifies the name of the profile. `(backtick), ~(tilde), @(at the rate), %(percentage), ^(carat), ()(brackets), -(hyphen), _(underscore), +(plus), =(equal to),  (pipe), {}(flower bracket), [] (square bracket), :(colon), ;(semi colon), .(dot) and , (comma) are allowed.
Description	Specifies the description and purpose of the profile
Clone From Existing Profiles	If replicating an existing profile, specifies the source profile
Permissions	Specifies the permissions that the profile has on each Mart Portal module.  If you have cloned an existing profile, on top of default permissions, you can edit the permissions according to your preferences.  Any dependent permissions for the selected permissions are selected too. For example, if you select the Create Entity permission, then Model Modify, ER Diagram Modify, ER Diagram Modify under Subject Area, and Key Group Create permissions are also selected.

4. Click .

To edit a profile, follow these steps:

1. Select the profile and click .
2. Edit the **Name**, **Description**, or **Permissions**.
3. Click .

If the objects are part of a model, the changed permissions come to effect when the user opens the model the next time. If the objects are part of the Mart, such as catalog, the changed permissions are effective immediately.

To delete a profiles, select a profile and click .

You cannot edit or delete the default profiles.

More information:

[How Profiles Work](#)

## How Profiles Work

The way profiles work depends on the following factors:

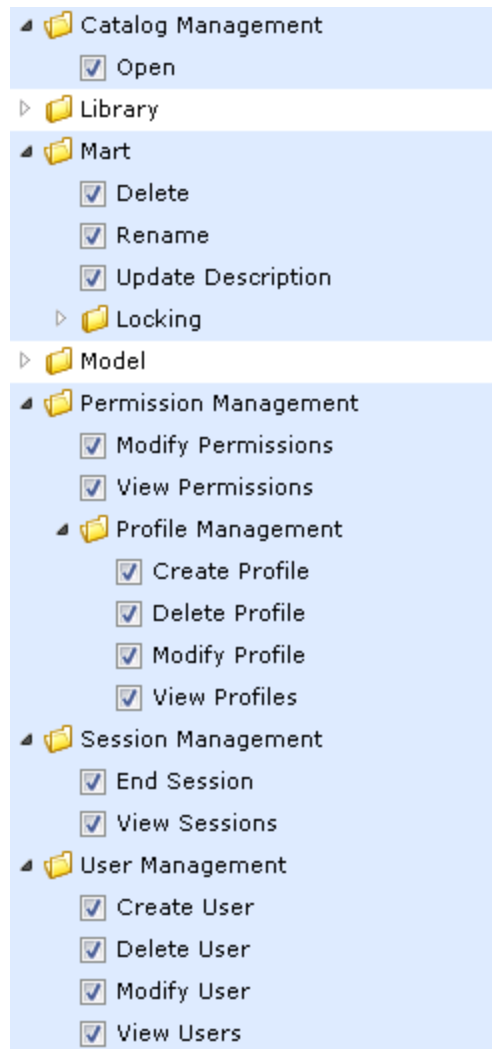
- The type of user that is assigned to the profile.
- The objects that are included in the profile.
- The permissions that are assigned to the objects.

This section describes the permissions available for various types of users. The section also includes common user profiles and describes permissions for those profiles.

Type 1: Mart level

- Includes items under Catalog Management, Mart, Permission Management, Session Management, and User Management.
- Mart level permissions are granted only if a user is assigned to a profile on Mart.
- The Mart level permissions are restricted or allowed at Mart Portal itself. The only exception is that Catalog Manager,

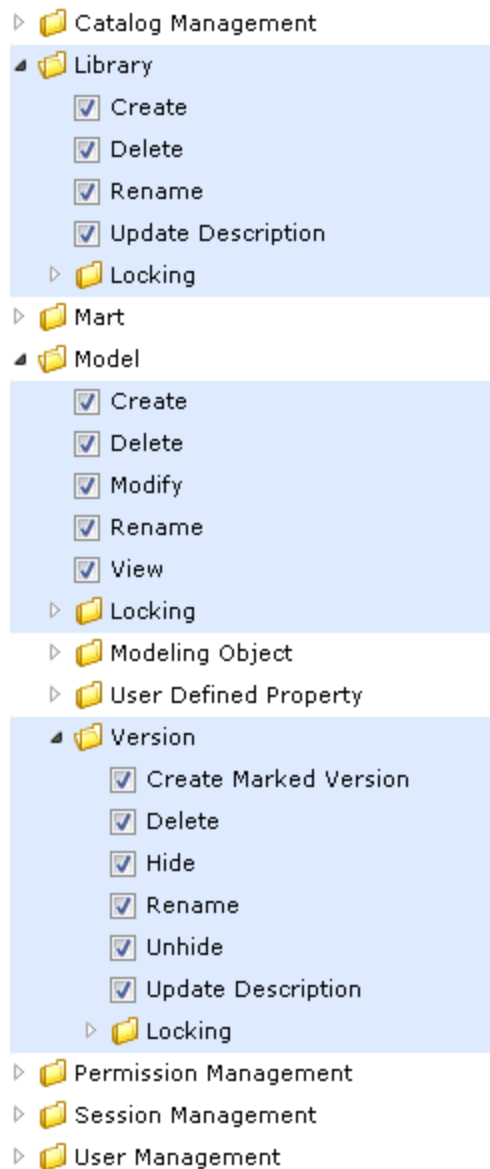
Open is handled by the client.



#### Type 2: Catalog Object level

- Includes items under Library, Model, and Version.
- All library privileges, that is, create, delete, view, and modify are granted when a user is assigned to a profile on the Library or Mart.
- Catalog Object level permissions are restricted or allowed at Mart Portal itself. The only exception is that Model, Modify is

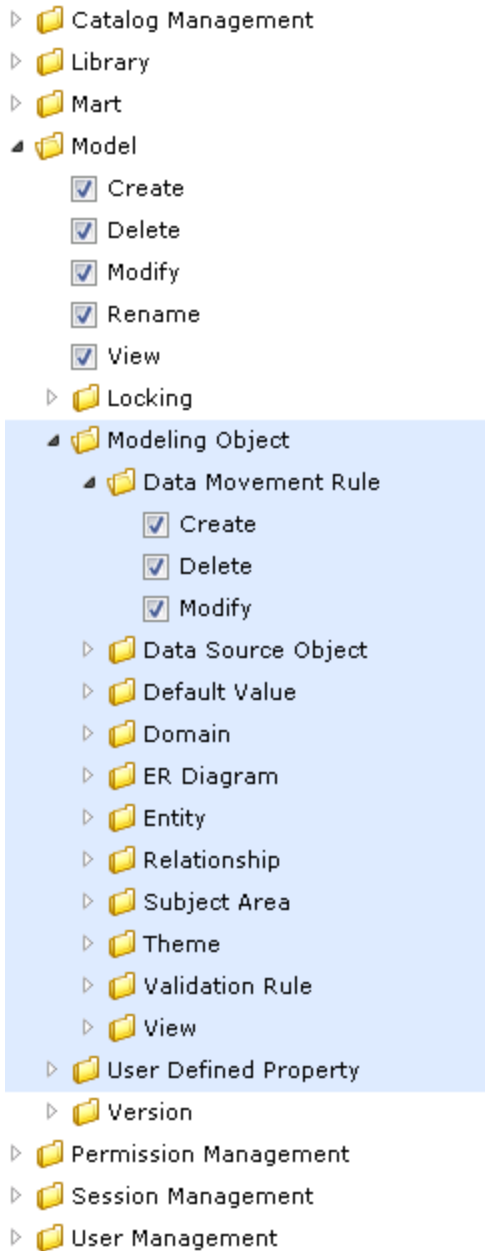
also verified in erwin DM as part of live semantic.



Type 3: Modeling Object level

- Includes items under Modeling Object.
- Modeling Object level permissions are used for restricting or allowing create, modify, and delete operations on modeling objects within the Catalog of type Model.

- Modeling Object level permissions are restricted or allowed from live semantic in erwin DM.



To be able to add an entity to the Subject Area and ER Diagram, set the Modify permission for Entity, Subject Area, and ER Diagram for the profile.

Permissions

Permission are defined as follows:

- A profile assigned to a user on a catalog.
- A Catalog could be the Mart, a Library, or a Model.

For more information about the types of users, see the Mart Users topic.

#### Authorization rules for users

The authorization rules for users are explained with examples for profiles and users. This approach helps you relate to a scenario that exists in your work environment and understand the rules better.

The authorization rules are explained based on the following sample catalog structure:

- Mart
  - Library1
    - Model1
    - Model2
  - Library2
    - Model3
    - Model4

Consider the following sample profiles and users:

- Sample profiles P1 and P2
- Sample Server user SU1
- Sample Active Directory (AD) user ADU1
- Sample AD groups ADG1 and ADG2

#### Authorization Rules for Server User

- Rule 1: P1 assigned to SU1 on Mart
  - SU1 gets the following privileges:
    - Type 1 privileges of P1 on Mart
    - Type 2 privileges of P1 on all libraries and models
    - Type 3 privileges of P1 on all models in Mart
- Rule 2: P1 and P2 assigned to SU1 on Mart
  - SU1 gets the union of P1 and P2 privileges on the entire Mart. Type 1, 2, and 3 privileges are considered. Union here means that if a privilege is restricted in P1 but allowed in P2, it is allowed for SU1.
  - In this case, multiple profile rule does not apply, as the union of privileges is used.
- Rule 3: P1 assigned to SU1 on Library1
  - SU1 gets the privileges assigned for P1 on the entire Library1.
  - Type 1 privileges are not considered.
- Rule 4: P1 assigned to SU1 on Model1
  - SU1 gets the privileges assigned for P1 on Model1.
  - Type 1 privileges and some Type 2 (Library) are not considered.
- Rule 5: P1 assigned to SU1 on Mart and P2 assigned to SU1 on Library1
  - SU1 gets the privileges of P1 on Mart and Library2, but not on Library1.
  - SU1 gets the privileges of P2 on Library1.

- Rule 6: P1 assigned to SU1 on Mart and P2 assigned to SU1 on Model1
  - SU1 gets the privileges of P1 on Mart, Library1, Model2, and the entire Library2, but not on Model1.
  - SU1 gets the privileges of P2 on Model1.

#### Authorization Rules for Windows User

- Rule 7:
  - If a Windows user is added as a Mart user, the rules of a Server User apply to the Windows user.

#### Authorization Rules for Group user

- Rule 8: P1 assigned to ADG1 on Mart, ADU1 is part of ADG1, and ADU1 not added as user on Mart
  - ADU1 gets the privileges of P1 on Mart.
- Rule 9: P1 assigned to ADG1 on Mart, P2 assigned to ADG1 on Library1, ADU1 is part of ADG1, and ADU1 is not added as user on Mart
  - ADU1 gets the privileges of P1 on Mart and Library2, but not on Library1.
  - ADU1 gets the privileges of P2 on Library1.
- Rule 10: P1 assigned to ADG1 on Mart, P2 assigned to ADG2 on Mart, ADU1 is part of ADG1 as well as ADG2, and ADU1 is not added as user on Mart
  - ADU1 gets the union of P1 and P2 privileges on Mart.
- Rule 11: P1 assigned to ADG1 on Mart, P2 assigned to ADG2 on Library1, ADU1 is part of ADG1 as well as ADG2, and ADU1 is not added as user on Mart
  - ADU1 gets the privileges of P1 on Mart and Library2.
  - ADU1 gets the union of P1 and P2 privileges on Library1.
- Rule 12: P1 assigned to ADG1 on Mart, ADU1 is part of ADG1, and ADU1 is also added as user on Mart
  - Since ADU1 is also added as a user on Mart, the user is not considered a part of any group. The rules are same as that of a Windows user.
- Rule 13: P1 assigned to ADG1 on Mart, P2 assigned to ADG2 on Mart, ADU1 is part of ADG1 only, ADG1 is subgroup of ADG2, and ADU1 is not added as user on Mart
  - ADU1 gets the privileges of P1 on Mart. This is because ADG1 is explicitly added on Mart and ADU1 is only part of ADG1.
- Rule 14: P1 assigned to ADG1 on Mart, P2 assigned to ADG2 on Mart, ADU1 is part of ADG1 as well as ADG2, ADG1 is subgroup of ADG2, and ADU1 is not added as user on Mart
  - ADU1 gets the union of P1 and P2 privileges on Mart.

 [Back to Top](#)


# Assign Permissions to Users or Groups

As a System Administrator, you assign different levels of permissions to users or groups. Control the level of permission and assign a user or a group to a profile, library, or model so that they have specific access. A user can be assigned to multiple profiles, libraries, or models. For example, a user can have full permissions on one library and only view permissions on another.

To assign permissions, follow these steps:

1. Go to **Application Menu > Permissions**.  
The Permissions page appears.






The screenshot shows the 'Permissions' page. The left pane, 'Select Catalog', contains a search bar and a list with 'Mart' selected. The right pane, 'Assign User/Group to Profile', contains a search bar and a list of profiles: Admin, Architect, Marketing, Modeler, and Viewer, each with a dropdown arrow. There are also icons for adding and removing items in both panels.

2. In the Select Catalog pane, select the libraries that you want the user to access.
3. In the Assign User/Group to Profile pane, click a profile.
4. Click the  to view a list of users or groups.
5. Select the required users or groups. You can verify your permission updates before submitting them. Click **Review Changes**.  
The Review Uncommitted Permission Changes page appears.



Review Uncommitted Permission Changes

×

Catalog	Profile	User	Change	Action
Mart	Architect	olivia	assign	
Mart	Marketing	george	assign	
Mart	Marketing	jacob	assign	
Mart	Modeler	george	assign	
Mart	Modeler	jacob	assign	

SUBMIT

6. Click **Submit**.  
The selected users or groups acquire the profile's permissions.

# Manage Catalogs

A catalog is similar to a directory structure. It consists of libraries, data models, model versions, and templates. Catalog Management displays a hierarchical tree of Mart and lets you manage and compare your catalogs. It has all the features included in the Library Manager and Session Manager modules that were available in the previous releases of erwin® Data Modeler Workgroup Edition.

Following are some of the features in Catalog Management:

## Libraries

Use libraries to group related models. Libraries add an extra level of security or isolate implementation differences, such as development and production environments. A library can be part of another library or can be present under the Mart.

## Sorting

In a catalog, the libraries are sorted alphabetically, and the models within the libraries are also sorted alphabetically. Versions are sorted newest to oldest; Named Versions appear first, and then Delta Versions follow. The catalog entries sort in the following order: Libraries, Models, Templates, and Versions respectively.

## Context Menu




The context menu appears when you select a catalog entry and right-click. You can use the context menu to cut, copy, paste, and delete a library, model, or template. You can also use the context menu to mark a Delta version and delete, hide, and unhide Named and Delta versions.

You can create, search, delete, copy, and move catalog entries; you can hide and unhide versions.

## Search Models

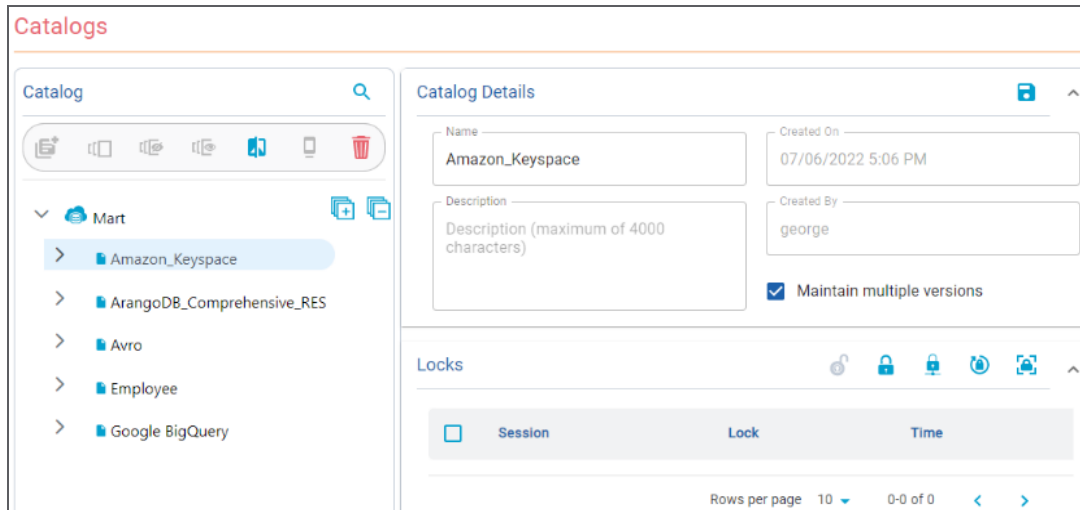
You can search models within models loaded from mart. This increases performance of Mart Portal and fetch search results quickly. By default, Loaded Models is selected.

To search model, follow these steps:

1. In the catalog pane, click .
  2. Click .
  3. Work with the following available options:
    - Loaded Models
      - Searches within models loaded from mart.
    - All Models
      - Searches within all models from mart.
  4. Enter a catalog name and click .
- Based on your search, catalogs appear.


To create Libraries, follow these steps:

1. Go to **Application Menu > Catalogs**.  
The Catalogs page appears.



2. In the Catalog pane, click .

A library is added to the catalogs tree.






3. Select the newly created library. and in the Catalog Details pane, click .

4. Edit the **Name** and **Description**.

In Name field, `(backtick)`, `~(tilde)`, `@(at the rate)`, `%(percentage)`, `^(carat)`, `() (brackets)`, `-(hyphen)`, `\_ (underscore)`, `+(plus)`, `=(equal to)`, `|(pipe)`, `{ }(flower bracket)`, `[ ] (square bracket)`, `:(colon)`, `;(semi colon)`, `.(dot)` and `, (comma)` are allowed.

5. Click .

Refer to the following table for catalog tree icons and their descriptions:

Icon	Description
	Indicates a Mart model
	Indicates that the model is harvested to erwin ER360
	Indicates that the model is harvested to erwin ER360 but has newer updates that are not harvested.
	Indicates that the model was marked as a template while saving to the mart
	Indicates an erwin DM project saved to mart

To create a Named version, follow these steps:


1. Select either a Named version or a Delta version of a data model and click .

A Named version is created.



2. In the Catalog Details pane, edit the **Name** and **Description**.

3. Click .

The name and description of the Named version is updated.

To hide a model version, select a version from the Catalog pane, and click .

To unhide a model version, follow these steps:

1. Select the model of that version, click .
2. click .


The Hidden Versions dialog appears.

Hidden Versions			
<input type="checkbox"/>	Name	Created By	Created On
<input type="checkbox"/>	Version 2	george	2021-08-30 18:34:33.93182
<input type="checkbox"/>	Version 3	george	2021-08-30 18:38:10.020193
Rows per page 10 ▾ 1-2 of 2 < >			
<div>CANCEL SUBMIT</div>			

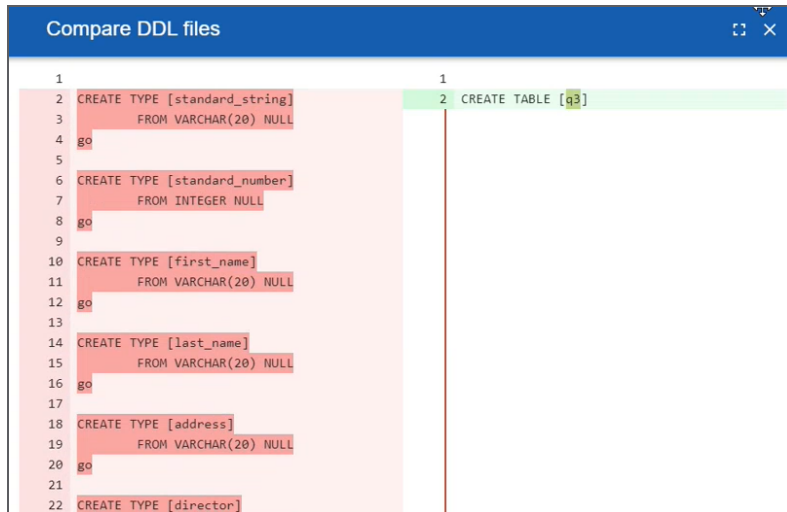
3. Select your version and click **OK**.

To compare two model versions, follow these steps:

1. Select and right-click the version of a model to which you want to compare another file and click Select Left File.

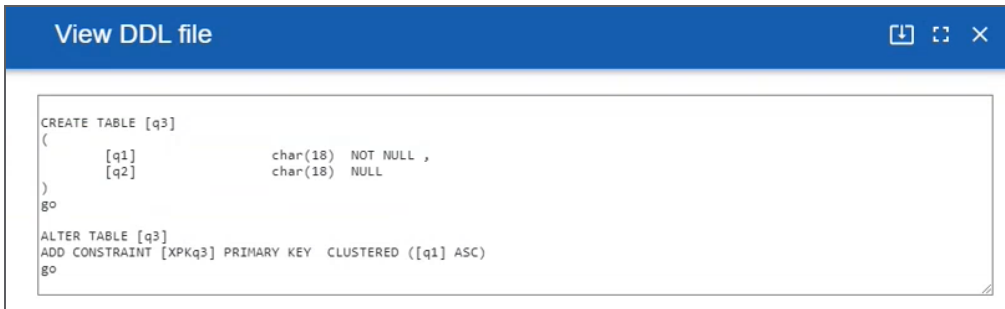
Alternatively, you can click  and select the two versions that you want to compare.

2. Select and right-click the another version of the same model and click Compare to <Version x>.  
The Compare DDL Files dialog appears.



Ensure that selected DDL versions are committed to your source control repository.

To view DDL of a model version, select a version and click . You can also download the DDL file using .



To delete a catalog entry, select the entry and click .

The Delete button is disabled when the last existing version of a model, or all the versions of a model are selected. The catalog entry is permanently deleted from Mart and it cannot be recovered.

## Lock a Catalog Entry

You can lock any catalog entry, even mart, to restrict other users from editing it. You can view the current lock status of a catalog entry in the Locks section. Locks last until the duration of a session or until removed. Locks can last even after a session is disconnected; it means that the user is disconnected from Mart but the lock is still preserved. You can work offline on a model without losing the lock. Only the Administrator can override any lock.

The following lock options are available in Mart:

### Existence Lock ( )

Prevents other users from deleting a catalog entry. When you have an Existence lock, other users can read and update, but not delete the catalog entry. You can edit or move the catalog entry but cannot delete the entry. The presence of an Existence Lock prevents anyone, other than the lock owner, from acquiring an Exclusive Lock on the entry. You can apply Existence Lock, Shared Lock, or Update Lock, with the existing Existence Lock, to the catalog entry.

### Shared Lock ( )

Prevents other users from editing the catalog entry. When you have a Shared lock, other users can read, but cannot update or delete the catalog entry. You can open a model with Shared Lock in read-only mode; you cannot edit the model. The presence of a Shared Lock prevents anyone from acquiring Update Lock or an Exclusive Lock on the entry. You can apply Existence Lock with Shared Lock to a catalog entry.

### Update Lock ( )

Lets only the lock holder to edit the catalog entry. When you have an Update lock, other users cannot read, update, or delete the catalog entry. The presence of Update Lock on an entry prevents other users from acquiring any other locks, except Existence Lock.

### Exclusive Lock ( )

Lets only the lock holder to edit a catalog entry. When you have an Exclusive lock, other users cannot read, update, or delete the catalog entry. In addition, no other user can add any type of lock on the entry.

### Unlock ( )

Lets only the lock holder to unlock an entry.

Depending on the type of lock, you can move any entry in the catalog. Acquire Update Lock on a catalog entry before you move that entry.

You cannot move or copy a catalog entry if any of the following conditions is true:

- the entry has any lock other than Existence Lock or Shared Lock
- the parent of that entry has any lock, other than Existence Lock
- the destination library or mart has any lock, other than Existence Lock

## Lock Behavior

When you edit a catalog entry, locks are applied automatically to appropriate levels in the catalog to prevent other users from editing the entry. When the edit is complete, the locks are removed or downgraded automatically.

The following scenarios apply to locks when you edit a catalog entry:

- When you load a model, Shared Lock is applied to the model and Existence Lock is applied to the parent entry up to the mart. After the model is loaded, Shared Lock is replaced with Existence Lock.
- When you initially save a model, Update Lock is applied to the model automatically. After the model is saved, Update Lock is replaced with Existence Lock automatically. If you apply the Update Lock manually, the lock is retained until you release it manually, or until the model is closed.
- When you incrementally save a model, Update Lock is applied to all the versions created between the opened version and the newly created version. After the model is saved, Update Lock is replaced with Existence Lock.
- When you delete a model, Exclusive Lock is applied to the model. After the model is deleted, the lock is dropped.
- When you delete a user, all the locks that the user had applied are deleted.
- When you rename a library, Update Lock is applied to the library. After the library is renamed, the lock is removed.
- When you load models for version compare, Shared Lock is applied to the root model. After the model is loaded, Shared Lock is removed.
- When you merge or import objects during version compare, Update Lock is applied to the root model. When the merge or import is complete, Update Lock is removed.

# Manage NSM Files

NSM File Management is a central repository for NSM files in the CSV format. It gives you the capability to store NSM files centrally and utilize them across erwin applications or between users in your organization. You can sync these files to a model in erwin Data Modeler or utilize as business assets (business term) in erwin Data Intelligence. For more information, refer to erwin Data Modeler and erwin Data Intelligence documentation.

Using NSM File Management, you can:

- [Add, view, and edit](#) NSM files centrally
- [Apply naming standards](#) to models in the mart
- [View a report](#) of NSM file to know which models it is applied to

NSM File Management may not work as expected in any language other than English.

To use NSM File Management, under **Profiles** ensure that your profile has the following permissions:

- NSM File Management:
  - Create NSM
  - Delete NSM
  - Modify NSM
- Catalog Management:
  - Open
- Model:
  - Modify
  - View



# Add NSM Files

You can add NSM files to the mart in the CSV format. Once you have added them, you can view or edit them.

To add NSM files, follow these steps:

1. Go to **Application Menu > Central NSM**.

The Central NSM page appears.

2. In the **NSM Files** pane, click .

The Add File page appears.

3. Enter a **Name**.  
Ensure that the:
  - NSM file name uses English characters only.
  - NSM file and its contents follow appropriate character set encoding:
    - **erwin Mart**: UTF-8
    - **erwin Data Modeler**: ANSI
4. Drag and drop an NSM file or click and browse one.
5. Select an NSM file (CSV format).

6. Click **Submit**.  
The selected NSM file is added to the central repository.
7. Select the NSM file to view it in Glossary Manager pane.

GLOSSARY MANAGER

APPLY/REMOVE NSM

Word/Words	Abbreviation	Alt Abbreviation	P	M1	M2	C	Definition
<input type="checkbox"/> CUSTOMER	CUST		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> MOVIE RENTAL RE...	MO RENT REC		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> EMPLOYEE	EMP		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> SALES ORDER	SLS ORD		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> movie copy numb...	mo co num		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	



10 Rows per page


1-5 of 5

## Edit NSM Files

You can edit an existing naming standard or add a new one.

To edit an existing naming standard, follow these steps:

1. On the Glossary Manager tab, select a naming standard and click  .
2. Edit the naming standard in-line.
3. Click  .

You can also download an NSM file to a local path. In the NSM Files pane, click  . Then, edit it in an external program and upload it back to NSM File Management.

# Apply NSM Files to Models in Mart Library

Once you have added NSM files to the NSM File Management repository, you can use them on models in your mart library.

To apply NSM files, follow these steps:

1. In the NSM Files pane, select an NSM file.  
NSM file opens in the glossary manager tab.

The screenshot shows the 'NSM Files' pane on the left with a list of files: 'Cigna Naming ...' (selected) and 'eMovies'. The right pane shows the 'GLOSSARY MANAGER' with the 'APPLY/REMOVE NSM' tab active. It displays a table of abbreviations.

Word/Words	Abbreviation	Alt Abbreviation	P	M1	M2
<input type="checkbox"/> Word/Words	Abbreviation	Alt Abbreviation...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ABBREVIATE	ABBR	ABBR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ABBREVIATED	ABBR	ABBRD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ABBREVIATING	ABBR	ABBRG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ABBREVIATION	ABBR	ABBRN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Click **Apply/Remove NSM** tab.  
A list of all the catalogs and models available in the mart is displayed.

The screenshot shows the 'GLOSSARY MANAGER' with the 'APPLY/REMOVE NSM' tab active. It displays a tree view of the mart structure:


- ▼ ☐ Mart
  - > ☐ Documents
    - ☐ SQL
    - ☐ Employee
    - ☐ PhModel\_SQL\_Contoso

3. Select models to which you want to apply the NSM File.  
If you select a folder, all the models in the folder are selected. You cannot unselect a few models under the folder then. If you want to select only a few models under a folder, select them individually.
4. Click .  
The NSM file is applied to the selected models and a success message is displayed. You can [view a report](#) of all the models to which an NSM file is applied.
  - 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.
  - Once an NSM file is applied to a mart model, you cannot detach it.


# View NSM File Report


An NSM file can be applied to multiple models. You can view a report of models to which an NSM files is applied. Apart from models, this report displays the time stamp and editor.

To view NSM file report, follow these steps:

1. In the **NSM Files** pane, select an NSM file.
2. On the actions bar, click .

A report with a list of models, and their modification time stamp opens.

View Report <span>×</span>			
			
NSM Files	Catalog Name	Modified By	Modified On
Cigna Naming Standards	Mart/Employee	George	2021-08-26 15:17:29.838
Cigna Naming Standards	Mart/PhModel_SQL_Contoso	George	2021-08-26 15:17:29.838
Rows per page: 10 <span>▼</span> 1-2 of 2 <span>◀</span> <span>▶</span>			

You can download this report and share it in the CSV format. Click .

# Enterprise Modeling Compliance

Enterprise Modeling Compliance (EMC) provides you (non-admin user) with a mechanism to apply metadata standards across your mart catalogs and maintain data model quality at the enterprise level.

To use EMC, you need to be well-versed with business requirements so that you can create and use a combination of policies and rules on your data models. This enables you to implement high compliance standards in your modeling practice.

Rules define a set of protocols to be followed in an organization for model compliance. You can create rules or use default rules to be followed throughout the model and populates errors or warnings if not followed.

Now, these rules are applied to the default policies or user-defined policies, which you can create. Policies are globally defined set of principles. Using policies, you can maintain business standards across your organization. Policies are applied to the objects such as attributes, columns, entities, tables, domains, and relationships, which are available in the models.

Based on the policy applied to the model, job can be executed and generate comprehensive reports with pass, error, and warning statistics. If the job result got failed, you can go to the model and improve the data quality for the objects to pass the job result.

Using Enterprise Modeling Compliance (EMC), you can:

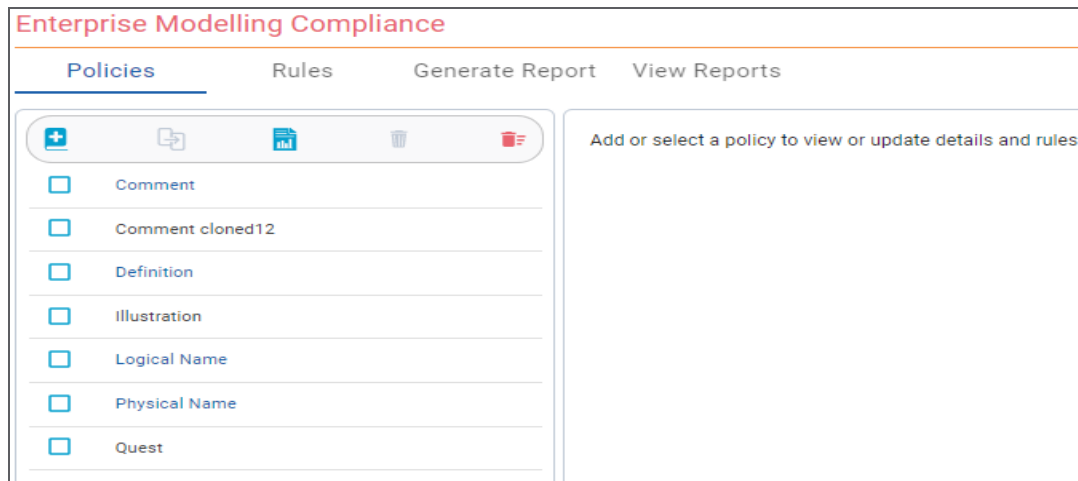
- [Create Policies](#)
- [Create Rules](#)
- [Generate Reports](#)
- [View Reports](#)

# Create Policy

In erwin Mart Portal, you can create policies for objects such as Attributes, Columns, Entities, Tables, Domains, and Relationships with passing criteria and apply validation rules. Here, pass criteria indicate at what percentage errors and warnings are generated. If the criteria match, the job can be passed successfully for the model.

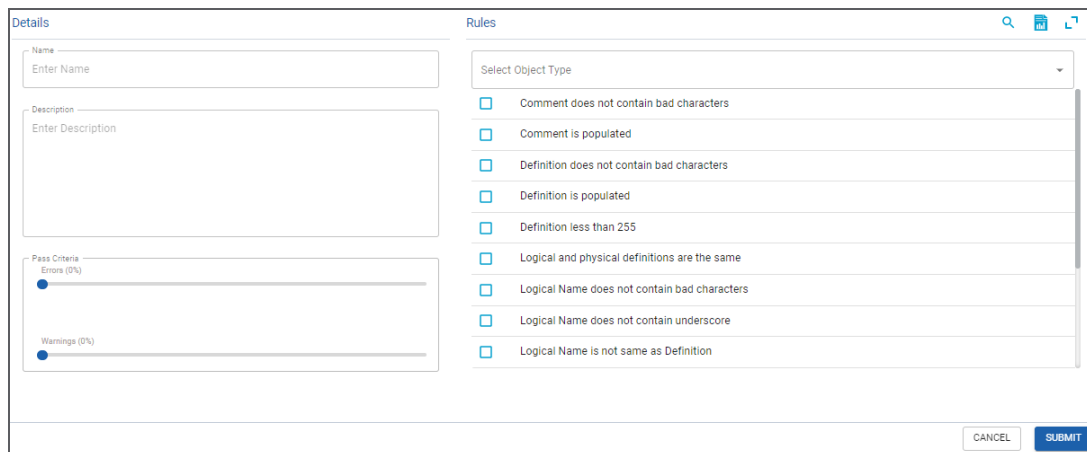
To create policies, follow these steps:

1. Go to **Application Menu > EMC**.  
The Enterprise Modeling Compliance page appears.



2. On the Policies tab, click .

The Details and Rules section appears.



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

Field	Description
Name	Specifies the name of the policy
Description	Specifies the description and purpose of the policy
Pass Criteria	Specifies the pass criteria in percentage for errors and warnings
Select Object Type	Specifies the object types from the drop-down list. Based on the selected object types, available rules appear. Select the required rules to apply to the policy.

4. Click **Submit**.


The policy is created and added to the list of policies.

Use the following options to manage the policies:

Clone Policy ()

Use this option to clone a policy. All the properties of the selected policy are cloned to the new policy, which can be modified as required.

Policy Report()

Use this option to view all policy reports. To download them as an MS Excel file, click .

Policies					
Name	Description	PassCriteriaErrors	PassCriteriaWarnings	Objects	Rules
Comment	Validate Comment rules	10	15	Column,Table,Domain,Relationship	Comment does not contain bad characters, Comment is populated
Definition	Validate Definition rules	10	15	Attribute,Entity,Domain,Relationship	Definition does not contain bad characters, Definition is populated, Definition less than 255, Logical and physical definitions are the same
Illustration	Used for only illustrating purpose	5	10	Domain	Comment is populated
Logical Name	Validate Logical Name rules	10	15	Attribute,Entity,Relationship	Logical Name does not contain bad characters, Logical Name does not contain underscore, Logical Name is not same as Definition, Logical Name is not same as Physical Name

Delete Policy ()

Use this option to delete a policy.

**Note:** You can delete only user-defined policies, displayed in black font.

Delete All Policies ()

Use this option to delete all user-defined policies.





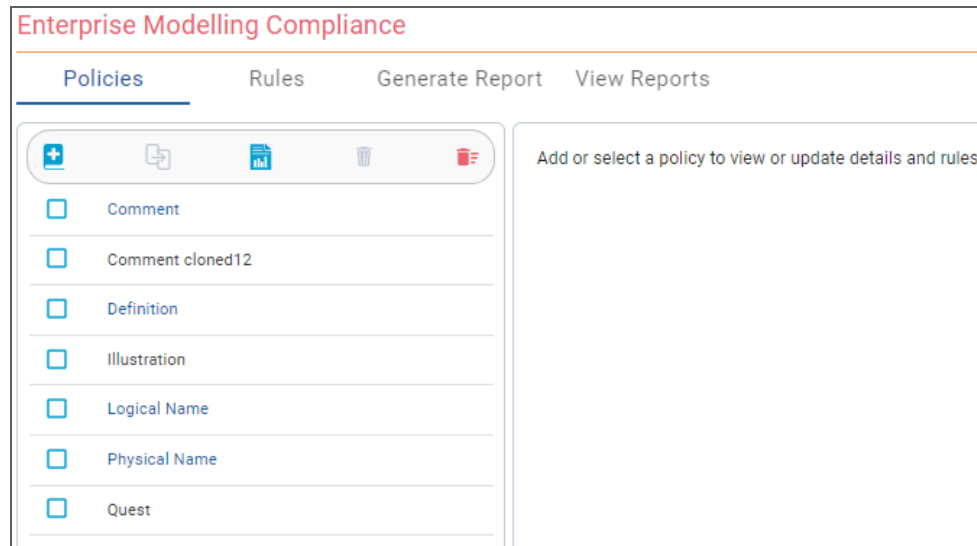
# Create Rules


Rules define a set of protocols to be followed in an organization for model compliance. You can create rules for default and user defined policies.

To create rules, follow these steps:

1. Go to **Application Menu > EMC**.

The Enterprise Modeling Compliance page appears.



2. On the **Rules** tab, click .

The Details section appears.

Policies
Rules
Generate Report
View Reports

+
Copy
Save
Delete
Filter

☐ Comment does not contain bad characters
☐ Comment is populated
☐ Comment must not have star
☐ Comment should be more than 5 words
☐ Definition does not contain bad characters
☐ Definition is populated
☒ Definition less than 255
☐ Logical and physical definitions are the same
☐ Logical Name does not contain bad characters
☐ Logical Name does not contain underscore
☐ Logical Name is not same as Definition
☐ Logical Name is not same as Physical Name

Details

Name
Description

Definition less than 255
Verify object definition is less than 255 characters

Select Property/Object
Definition

Select Validate Action
is less than

Enter Value
255

Warning
☒
Error
☐

CANCEL
SUBMIT

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

Field	Description
Name	Specifies the name of the rule
Description	Specifies the description and purpose of the rule
Select Property/Object	Specifies the property or object to which the rule is applicable
Select Validate Action	Specifies the condition for validation. Based on the selected object type, available options may vary.
Enter Value	Specifies the value for validation
Warning/Error	Specifies whether failing the rule populates results in a warning or error

4. Click **Submit**.


The rule is created and added to the list of policies.

Use the following options to manage the rules:

Clone Rule (  )

Use this option to clone a rule. All the properties of the selected rule are cloned to the new rule, which can be edited.

Rules Report (  )

Use this option to view all rules reports. To download them as an MS Excel file, click  .

Rules					
Name	Description	Property/Object	Validate	ValueField/Value	Error/Warning
Comment does not contain bad characters	Verify object Comment does not contain bad characters	Comment	does not contain	\$#@&%*()!	Error
Comment is populated	Verify object Comment is populated	Comment	is populated		Error
Definition does not contain bad characters	Verify object definition does not contain bad characters	Definition	does not contain	\$#@&%*()!	Error
Definition is populated	Verify object definition is populated	Definition	is populated		Error
Definition less than 255	Verify object definition is less than 255 characters	Definition	is less than	255	Error
Logical and physical definitions are the same	Verify object Logical and physical definitions are the same	Definition	is same	Comment	Error
Logical Name does not contain bad characters	Verify object logical name does not contain bad characters	Logical Name	does not contain	\$#@&%*()!	Error

Delete Rule (  )

Use this option to delete a rule.

**Note:** You can delete only user-defined rules, displayed in black font.

Delete All Rules (  )

Use this option to delete all user-defined rules.

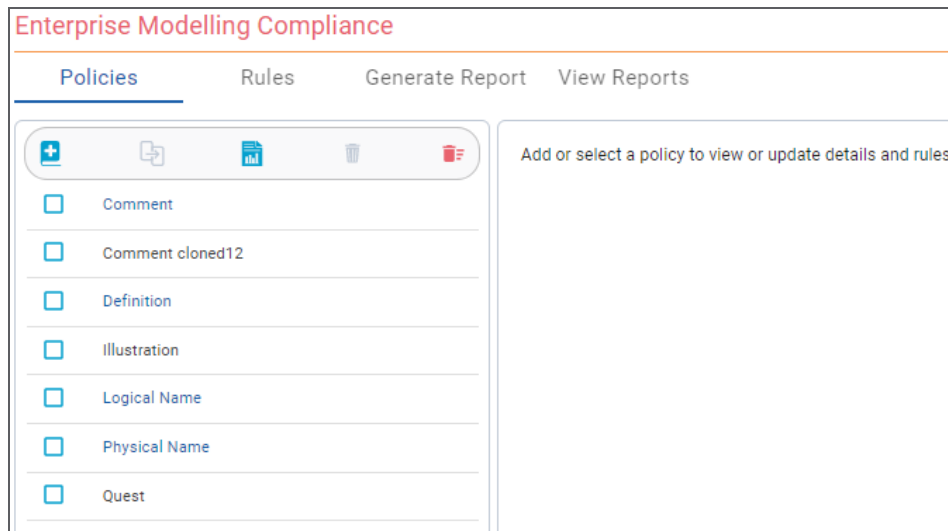
# Generate Reports

In erwin Mart Portal, you can schedule and run jobs to apply policy to the catalogs saved in Mart.

The Generate Report tab provides you the options to add, run, manage, cancel, refresh, and delete report jobs.

To create a report job, follow these steps:

1. Go to **Application Menu > EMC**.  
The Enterprise Modeling Compliance page appears.



2. Click **Generate Reports**.

The Generate Reports page provides the details of report jobs, such as:

- Job Name
- Job Interval
- Last Schedule Run
- Next Schedule Run
- Job State
- Last Run Job Status
- Modified By
- Modified On



Add Report Job

CATALOG INFORMATION

POLICY INFORMATION

REPORT INFORMATION

Select Policy

< PREVIOUS

NEXT >

5. Select the policy which you want to apply for the job, and click **Next**.  
The Report Information tab opens.

Add Report Job

CATALOG INFORMATION

POLICY INFORMATION

REPORT INFORMATION

Report Name

Enter Report Name

Scheduled On

2022/10/27 09:55 AM

Job Interval

☐ Notify Me

Notification Email

CC List

☐ Run Now

PREVIOUS

SUBMIT

6. On the Report Information tab, enter the following details:

Report Name

Specifies a name for the report.

Scheduled On

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

Job Interval

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

Notify Me

Specifies whether a notification is sent to you when the job status changes.

This enables the Notification Email and CC List fields.

Notification Email

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

CC List

Specifies a list of email addresses, separated by a semi-colon, that must receive the job notification



Run Now

Specifies whether to run the job immediately.

7. Click **Submit**.

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

Once a job is set up, you can perform the following actions on it:

- **Run Job:** Use this option to run a scheduled recurring job immediately.
- **Manage Job:** Use this option to 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.
- **Refresh Job:** Use this option to refresh the job state.
- **Cancel Job:** Use this option to cancel a scheduled or running job.
- **Delete Job:** Use this option to delete a job from the job list.
- **View Log:** Use this option to view a job's log. In case of failures, you can use the log to troubleshoot.

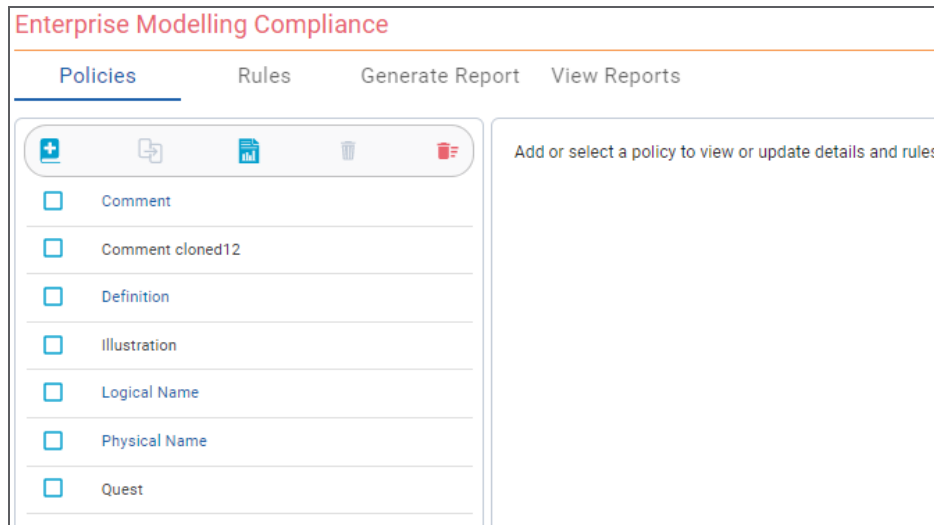
# View Reports

You can view all reports with their overall results and statistics (percentage of pass, error, and warnings). Also, If you select any report, you can see detailed job report with object name, its type and applied rules for the catalog, and results.

The View Report tab provides you the options to add, run, manage, cancel, refresh, and delete reports.

To view reports, follow these steps:

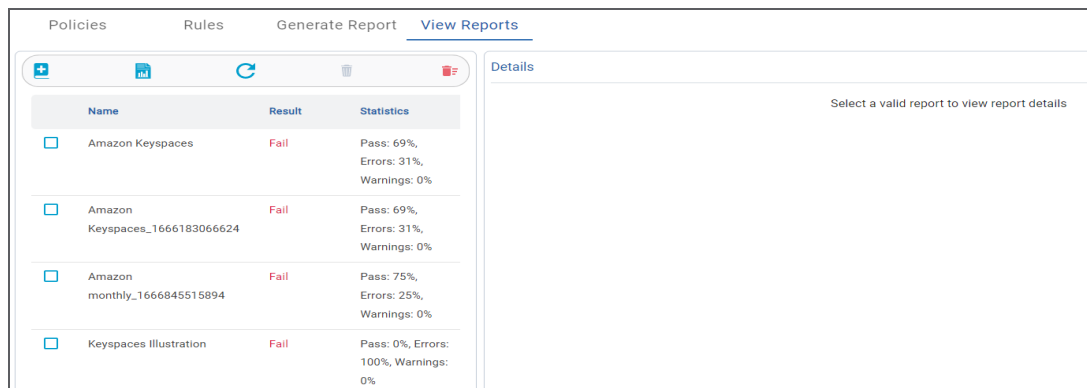
1. Go to **Application Menu > EMC**.  
The Enterprise Modeling Compliance page appears.



2. Click **View Reports**.

The View Reports page provides the details of reports, such as:

- Name
- Result
- Statistics (percentage of pass, error, and warnings)



3. Select a report to view detailed information.

Details						
Catalog	Object Type	Name	Logical Name does not contain underscore	Logical Name is not same as Physical Name	Logical Name does not contain bad characters	Logical Name is not same as Definition
Amazon_KeySpace_REC_826659	Entity/Table	all_data_types	Error	Error	Pass	Pass
Amazon_KeySpace_REC_826659	Entity/Table	t_0123456789123456789_abcdefghijklmnopqrstuvwxyz	Error	Error	Pass	Pass
Amazon_KeySpace_REC_826659	Entity/Table	table123	Pass	Error	Pass	Pass
Amazon_KeySpace_REC_826659	Entity/Table	tbl_48_char_123456789_abcdefghijklmnopqrstuvwxyz	Error	Error	Pass	Pass
Amazon_KeySpace_REC_826659	Entity/Table	cyclingtab	Pass	Error	Pass	Pass
Amazon_KeySpace_REC_826659	Entity/Table	test_999	Error	Error	Pass	Pass
Amazon_KeySpace_REC_826659	Entity/Table	my_table	Error	Error	Pass	Pass
Amazon_KeySpace_REC_826659	Entity/Table	my_table2	Error	Error	Pass	Pass
Amazon_KeySpace_REC_826659	Entity/Table	employee_information	Error	Error	Pass	Pass

Use the following options to work on reports:

Add Report (  )

Use this option to create a new report job. For more information, refer to the [Generate Reports](#) topic.

All Reports (  )

Use this option to view all reports. To download them as an MS Excel file, click .

Reports						
Name	Policy	Result	Statistics	Status	Modified On	Modified By
Amazon KeySpaces	Logical Name	Fail	Pass: 69%, Errors: 31%, Warnings: 0%	Completed	2022-10-20 18:08:00.174	George
Amazon KeySpaces_1666183066624	Logical Name	Fail	Pass: 69%, Errors: 31%, Warnings: 0%	Completed	2022-10-19 18:07:46.818	George
Amazon monthly_1666845515894	Definition	Fail	Pass: 75%, Errors: 25%, Warnings: 0%	Completed	2022-10-27 10:08:36.046	George
KeySpaces Illustration	Illustration	Fail	Pass: 0%, Errors: 100%, Warnings: 0%	Completed	2022-10-27 09:48:33.81	George

Refresh Report (  )

Use this option to refresh the result and statistics of all reports.

Delete Report (  )

Use this option to delete a report.

Delete All Reports (  )

Use this option to delete all reports.

Search (  )

Use this option to search reports.

View Column (  )

Use this option to select the columns to be displayed in the report.

Filter Table (  )

Use this option to filter logs based on catalog, object type, name, and rules.

Download Excel ()

Use this option to export the report to an MS Excel file.

# Enterprise Glossary

Enterprise glossary provides you with a mechanism to implement business terms, vocabularies, ontologies, and standards. Thus enabling you to build and govern an enterprise-level standard for your mart catalog assets.

Using Enterprise Glossary, you can create and associate your business terms and definitions used in different areas of your business departments or domains.

Here, enterprise glossaries work as containers for business terms. Therefore, before creating business terms, you need to create a glossary for them. You can also create sub-glossaries to group business terms further.

Once business terms are added to the glossary, it is then associated to the catalogs.

After association, you can map business terms to the objects available in the catalogs and generate association and mapping reports. Glossary Associations Report includes details such as catalog name and number of unmapped objects. A Mapping report displays details such as catalog name, object type, object name, and mapped term.

Using Enterprise Glossary, you can:

- [Add Glossaries](#)
- [Add Business Terms](#)
- [Apply Association](#)
- [Create and Manage Maps](#)
- [View Reports](#)

# Add Glossary

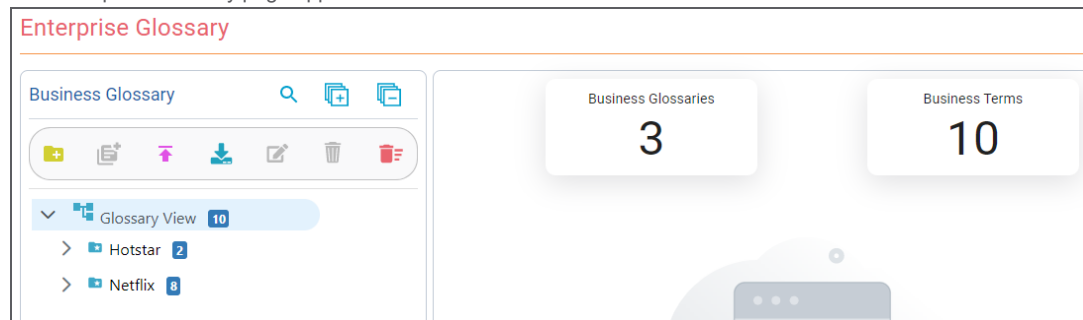
Glossaries in erwin Mart Portal are containers for the business terms created in Enterprise Glossary workspace.

You can create glossaries based on your organization's projects, departments, or functions. Before creating business terms, you need to create a glossary. You can also create sub-glossaries to group business terms further.

To add glossaries, follow these steps:

1. Go to **Application Menu > Enterprise Glossary**.

The Enterprise Glossary page appears.



2. Select the required parent glossary or sub-glossary and click .

The Add New Glossary window appears.

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

Field	Description
Name	Specifies the name of the glossary. For example, Sunflower.
Description	Specifies the description and purpose of the glossary. For example, Sunflower contains information about Users, Flower details, and Uses.

4. Click **Submit**.

The glossary is created and added to the list of glossaries.

Use the following options to work on glossaries:

Add Business Term (  )

Use this option to add business terms to the glossary. To know more, refer to the [Add Business Term](#) topic.

Import Glossary File (  )

Use this option to import glossary files.

Download Glossary File (  )

Use this option to download glossary files.

Edit Glossary (  )

Use this option to edit glossaries.

Delete Glossary (  )

Use this option to delete glossaries.

Delete All Glossaries (  )

Use this option to delete all glossaries.

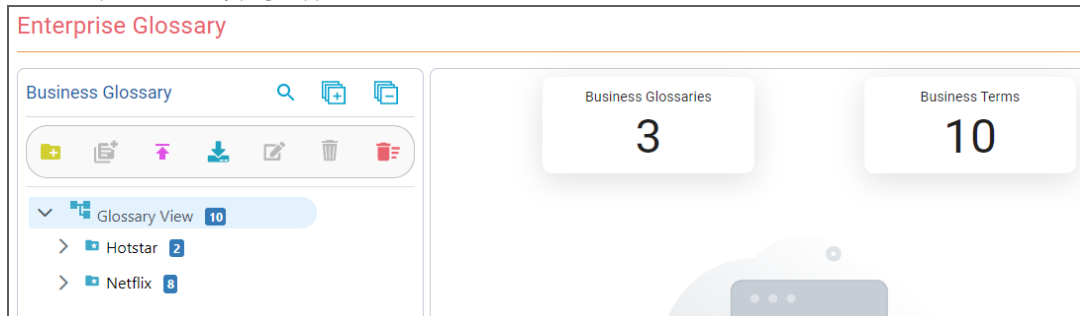
# Add Business Term

In erwin Mart Portal, you can create business terms and group them based on your organization's projects, departments, or functions.

To add business terms, follow these steps:

1. Go to **Application Menu > Enterprise Glossary**.

The Enterprise Glossary page appears.



2. Select a glossary.

3. Click .

The Add New Business Term window appears.

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

Field	Description
Business Term	Specifies the name of the business term.




Field	Description
	For example, Account.
Definition	Specifies the definition of the business term. For example: An Account contains data for a party.
Description	Specifies the description about the business term. For example: Account contains data for posting, payments, debt recovery, and taxes.
Sensitive Data Indicator (SDI)	Specifies whether the business term is sensitive.
SDI Classification	Specifies the sensitivity classification of the business term. This option is available only when SDI is selected.
SDI Description	Specifies the description about the sensitivity classification. This option is available only when SDI is selected.

5. Click **Submit**.

The business term is created and added to the list of terms.

Use the following options to work on policies:

Search (  )

Use this option to search business terms.

Add Business Term (  )

Use this option to add business terms.

Edit (  )

Use this option to edit business terms.

Delete (  )

Use this option to delete business terms.

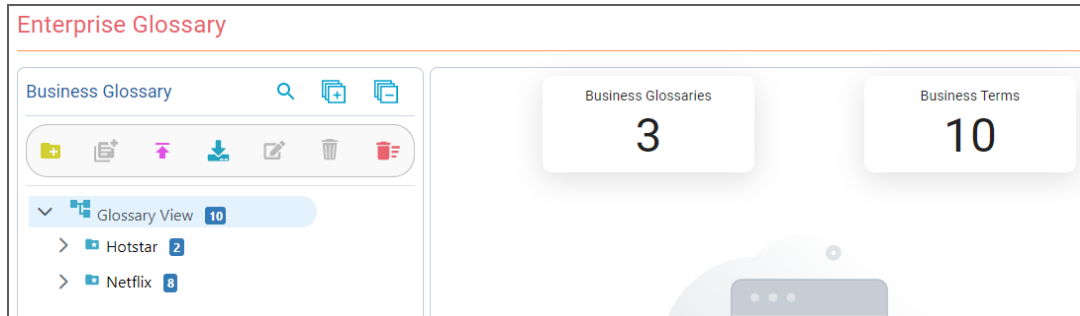
# Apply Associations

Using Associations, you can assign the glossaries you created to the models in your catalogs.

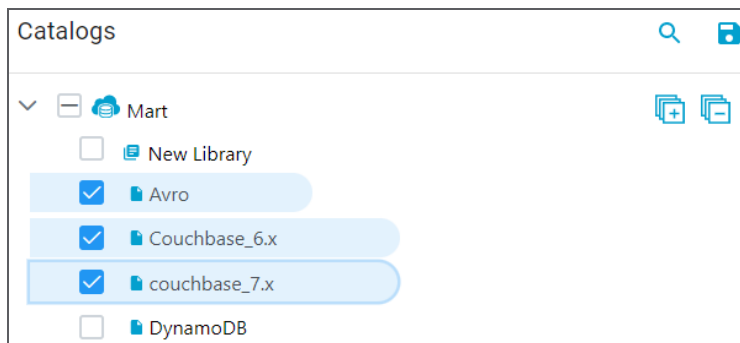
To create associations, follow these steps:

1. Go to **Application Menu > Enterprise Glossary**.

The Enterprise Glossary page appears.



2. Select the required top-level glossary.
3. On the Associations tab, select the catalogs to which you want to assign the glossary.



4. Click .

The glossary is associated to the selected catalogs.

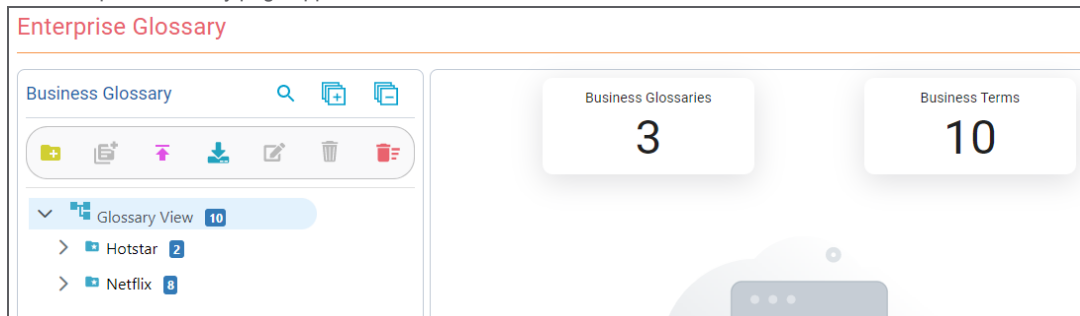
# Create and Manage Mappings

After associating glossaries to catalogs, you can map business terms in the glossaries to objects available in the catalogs.

To create mappings, follow these steps:

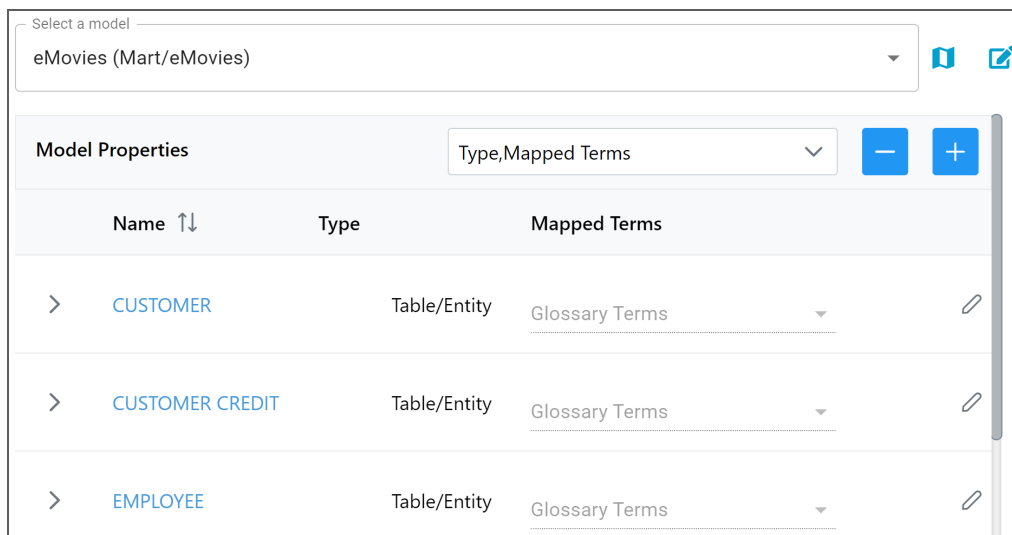
1. Go to **Application Menu > Enterprise Glossary**.


The Enterprise Glossary page appears.



2. Select a glossary.
3. On the **Mappings** tab, select a model to which you want to map business terms.

The Model properties section appears.




4. Click .
5. In the Glossary Terms drop-down, against each model object, select one or more business terms as required.

Name ↑↓	Type	Mapped Terms		
Adaptive_doc	Table/Entity	Glossary Terms customer credit	▼	✓ ✕
Adaptive_doc2	Table/Entity	Glossary Terms customer credit employee	▼	✓ ✕
Document_T1	Table/Entity	Glossary Terms employee	▼	✓ ✕

6. Click **Save**.

Business terms are mapped to the objects.

To automatically map business terms to the catalog, click **Auto Map** ()

# View Reports

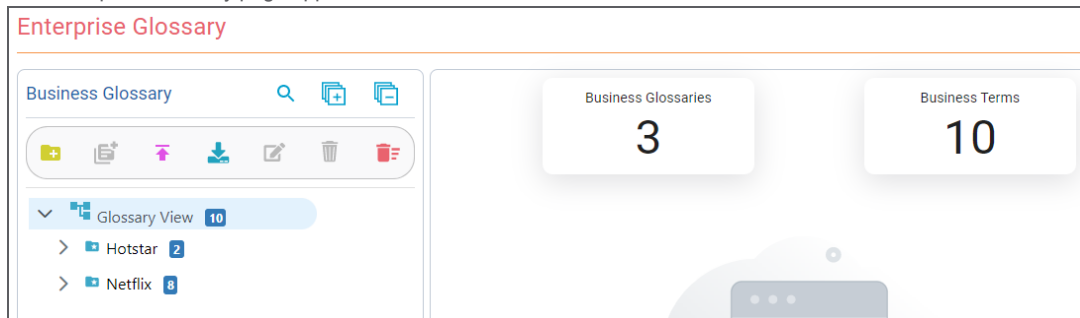
Once you have mapped business terms to catalogs, you can view Glossary Association Report and Mapping Report.

Glossary Associations Report displays catalog names and number of unmapped objects in the catalogs. Mapping Report displays catalog names, object names, object type, and mapped terms.

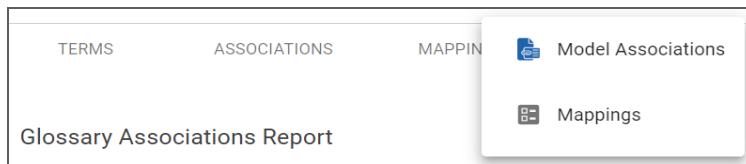
## View Glossary Associations Report

To view associations reports, follow these steps:

1. Go to **Application Menu > Enterprise Glossary**.  
The Enterprise Glossary page appears.



2. Select the glossary.
3. Click the **Reports** tab.



4. Click **Associations**.

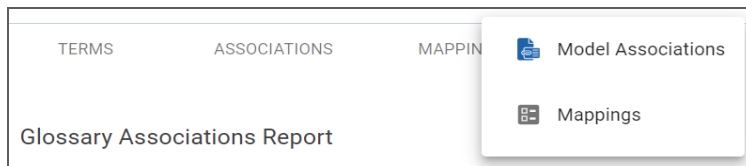
TERMS	ASSOCIATIONS	MAPPINGS	REPORTS
Glossary Associations Report			
Name	Not Mapped Objects	Modified By	Modified On
Couchbase_6.x (Mart/Couchbas...	316	George	2022-11-29 14:34:52
Avro (Mart/Avro)	1268	George	2022-11-29 11:56:48

The Glossary Associations Report appears.

## View Mapping Report

To view mappings reports, follow these steps:

1. Click the **Reports** tab.




2. Click **Mappings**.
3. Select the required models from the drop-down.

The Business Term Mappings report for the selected models appears.

Business Term Mappings			
Catalog Name	Object Name	Object Type	Mapped Term
Couchbase_6.x (Mart/Couchbase_6.x)	Adaptive_doc	Table/Entity	customer credit
Couchbase_6.x (Mart/Couchbase_6.x)	Adaptive_doc	Table/Entity	employee
Couchbase_6.x (Mart/Couchbase_6.x)	Adaptive_doc2	Table/Entity	customer credit
Couchbase_6.x (Mart/Couchbase_6.x)	Adaptive_doc2	Table/Entity	employee
Couchbase_6.x (Mart/Couchbase_6.x)	Document_T1	Table/Entity	employee
Couchbase_6.x (Mart/Couchbase_6.x)	Document_T3	Table/Entity	customer
Couchbase_6.x (Mart/Couchbase_6.x)	Document_T4	Table/Entity	payment
Avro (Mart/Avro)	applicationNumber	Column/Attribute	movie
Avro (Mart/Avro)	ARREventDemandDepositAccountA...	Table/Entity	customer

Use the following options to work on reports:

Search (  )

Use this option to search for a catalog.

Download CSV (  )

Use this option to download the report in .csv format.

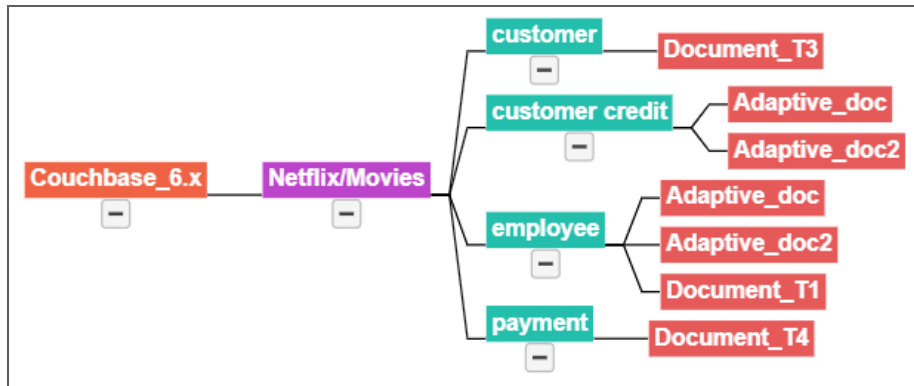
Download Excel (  )

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

Show Tree View (  )

Use this option to display the business term mappings in a tree view.

**Note:** Ensure that you have selected only one model to get tree view.





# Manage Sessions

As a Mart Portal, use Session Management to view sessions and locks applied in a session, and terminate sessions of Mart users.

A session tracks data and activities of users for each operation in Mart. A session can have the following statuses:

## Active

Indicates that the user is actively working with the session.

## Inactive

Indicates that the Server Session was terminated due to inactivity or connection loss.

## Close

Indicates that the Server Session was close.


## Disconnect

Indicates that the Server Session was disconnected due to session timeout.

Terminating sessions is usually done for the following reasons:

- To allow another user to work on the catalog entry
- To delete an Inactive session, or a session that is not used by the user anymore
- To gain complete control over a catalog and restrict other users from accessing that catalog

To terminate a session, do the following:

1. From the Session pane, select a session.
2. Click .

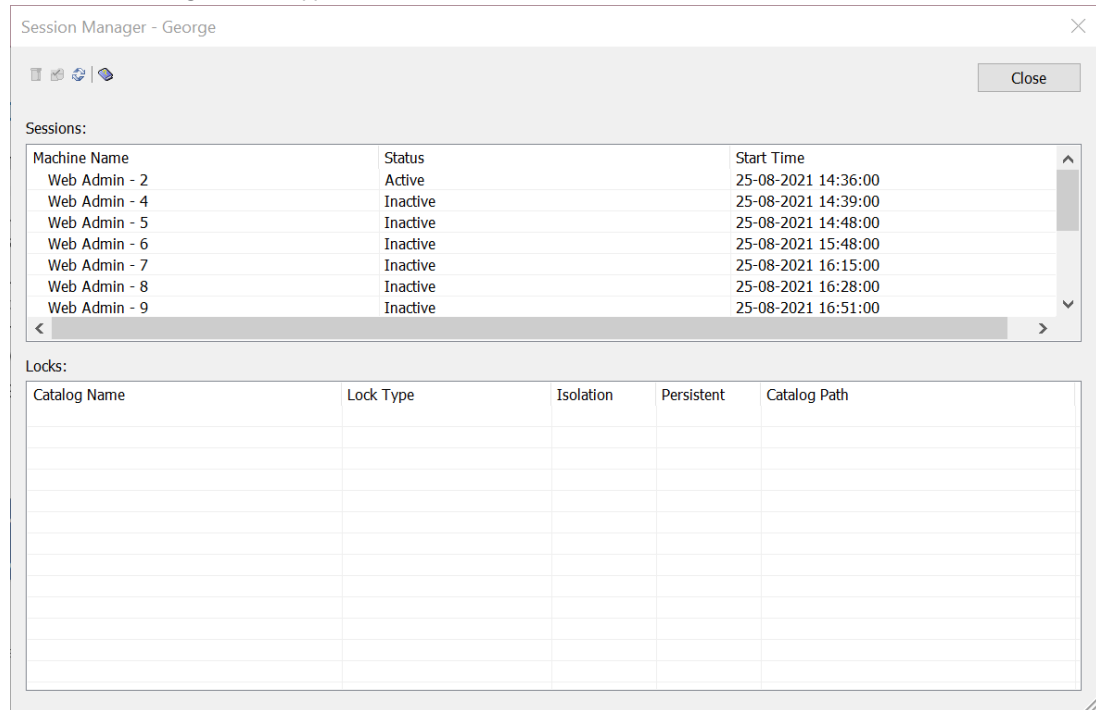
The session is terminated.

Although you can manage sessions from the Mart Portal, you cannot delete multiple sessions at a time. Multiple session selection and deletion is disabled through Mart Portal so that an administrator does not accidentally delete sessions that are in use by other users. However, you can select and delete multiple sessions from erwin Data Modeler. To do so:

1. From erwin Data Modeler, connect to erwin Mart.

2. Click .

The Session Manager screen appears.



- Under Sessions, hold the CTRL key and select the sessions that you want to delete.

4. Click .

Terminating a session will remove the automatic locks applied by erwin® Data Modeler and not the locks applied by the user in that session. You must unlock each catalog entry from the Catalog Management panel.

More information:

## Lock Behavior

# DM Connect for DI

The DM Connect for DI utility is an integration between erwin Data Modeler (erwin DM) and erwin Data Intelligence (erwin DI). It enables you to sync data between erwin DM and erwin DI using erwin Mart Portal as an interface; thus, maintaining a single metadata and glossary source.

Using DM Connect for DI, you can schedule jobs to push data models from your mart repository to erwin DI's Data Catalog and from erwin DI to erwin DM. Further, it integrates the naming standards set up on your models into the Business Glossary Manager. For more information on how the DM Connect for DI utility works, refer to the [erwin DM Connect for DI](#) guide.

Ensure that the names of valid values do not exceed 200 characters, or the validation rules are not exported to DI.

Before you start using DM Connect for DI, ensure that you have the following in place:

- A working erwin DI application.  
[Configure your application](#) in the DI Configuration pane.
- [Minimum erwin Mart permissions](#)
- [Minimum erwin DI permissions](#)

DM Connect for DI may not work as expected in any language other than English.

Once you have the above prerequisites in place,

to start exporting data to erwin DI, [schedule export jobs](#).

to start importing data to erwin DM, [schedule import jobs](#).

You cannot export models from erwin Mart Portal and erwin DM v12.5 to erwin DI v11.0 and v11.5.

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

Products-Versions	erwin DI 10.0	erwin DI 10.1	erwin DI 10.2	erwin DI 11	erwin DI 11.5	erwin DI 12.0	erwin DI 12.1	erwin DI 13.0
erwin Mart Portal 2021R1	Yes	Yes	Yes	Yes	Yes	No	No	No
erwin Mart Portal 12.0	Yes	Yes	Yes	Yes	Yes	No	No	No
erwin Mart Portal 12.1	No	No	No	No	No	Yes	Yes	Yes
erwin Mart Portal 12.5	No	No	No	No	No	No	No	Yes
erwin Mart Portal 12.5.1	No	No	No	No	No	No	No	Yes
erwin Mart Portal 12.5.2	No	No	No	No	No	No	No	Yes

# erwin DM Connect for DI Permissions

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

## Minimum erwin Mart Permissions

### DI Configuration

Configuration/View DI Configuration

Configuration/Edit DI Configuration

### DM Connect for DI

DM Connect for DI

Settings/View Mart Settings

Settings/Edit Mart Settings

## Minimum erwin DI 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 Properties

Mapping Manager
Projects/Create Project
Projects/Mappings/Create Mapping
Projects/Project Tabs/Project Details/View Project Details

Business Glossary 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/View
Custom Objects/Import Catalog

# Adding Export to erwin DI Jobs



An Export to DI job converts a model to erwin DI 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 (erwin DM) and erwin Data Intelligence(erwin DI), refer to the [Data Sharing](#) topic.

By default the DM Connect for DI app 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 jobs, follow these steps:

1. In the header pane, click  and then click **DM Connect for DI**.  
The DM Connect for DI page opens.
2. Click a suitable calendar slot or click .
3. Click **Export to DI**.  
The Schedule Job page appears.

Schedule Job

CATALOG INFORMATION

DI INFORMATION

JOB INFORMATION

Select Models

count  
0

Mart

>

Documents

New Library

New Library (1)

>

SQL

Employee

PhModel\_SQL\_Contoso

Include NSM

NEXT

>

4. Set up job parameters as follows:

Tab	Field	Description
Catalog Information	Select Models	Select models from mart catalog to export. The <b>Count</b> field displays the number of selected models.



Tab	Field	Description
	Include NSM	<p>Select whether naming standards must be exported. A catalog named by the NSM file is created under <b>Business Glossary Manager &gt; DM NSM Files</b> custom asset.</p> <p>Ensure that the DM NSM Files asset is enabled in <b>erwin DI &gt; Business Glossary Manager Settings</b>.</p>

Tab	Field	Description
DI Information	Connector Name	Select a configuration to use for the export job.
	System Name	Enter a system name. This corresponds to System in Metadata Manager.
	Environment Name	<p>Use the predefined macros to set the environment name. This corresponds to Environment in Metadata manager.</p> <p>For system and environment names, following special characters are allowed:</p> <ul style="list-style-type: none"> <li>• <b>System:</b> - (hyphen), _ (underscore), and space</li> <li>• <b>Environment:</b> @ (at sign), \$ (dollar sign), &amp; (ampersand), / (slash mark), - (hyphen), _ (underscore), and space</li> </ul> <p>All other special characters are replaced with _ (underscore).</p>
	Export Options	<p>Select a suitable export option:</p> <ul style="list-style-type: none"> <li>• <b>Add New:</b> <ul style="list-style-type: none"> <li>• If an environment exists, this option adds any new tables or columns to it.</li> <li>• If an environment does not exist, this option creates an environment and adds tables and columns to it.</li> </ul> </li> <li>• <b>Update Existing + Add New:</b> <ul style="list-style-type: none"> <li>• If the existing model objects have changed, this option exports the updates to the existing model objects in erwin DI .</li> <li>• Also, it exports any new objects in the model to erwin DI .</li> </ul> </li> <li>• <b>Update Existing + Add New + Invalidate:</b> <p>Along with the functionality of Update Existing + Add New option, this option invalidates any deleted tables or columns.</p> </li> <li>• <b>Delete &amp; Reload:</b> <p>This option deletes all the tables and columns. Then, it exports them again.</p> </li> </ul>
	Version	Select whether a version of an existing environment must be created. This archives the existing environment.

Tab	Field	Description
Job Information	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 check box to run the job immediately.

5. Click **Submit**.

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



Once a job is set up, you can use the following options on it:

- **Run Job:** Use this option to run a scheduled recurring job immediately.
- **Manage Job:** Use this option to 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 canceled, 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.
- **Refresh Job:** Use this option to refresh the job state.
- **Cancel Job:** Use this option to cancel a scheduled or running job.
- **Delete Job:** Use this option to delete a job from the job list.
- **View Log:** Use this option to view a job's log. In case of failures, you can use the log to troubleshoot.



# Adding Import to erwin DM Jobs

An Import to DM job imports environments and the underlying tables, columns, and metadata to a mart catalog in the original file format as a model. You can then, connect to your mart via erwin DM and open the saved model. erwin DM automatically converts this model to an erwin model. You can save this model locally or on mart. When you save this model back to the mart, it is saved with the corresponding timestamp.

For more information about data sharing between erwin Data Modeler (erwin DM) and erwin Data Intelligence (erwin DI), refer to the [Data Sharing](#) topic.


By default the DM Connect for DI app 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 import to DM jobs, follow these steps:


1. In the header pane, click  and then click **DM Connect for DI**.  
The DM Connect for DI page opens.
2. Click a suitable calendar slot or click .
3. Click **Import to DM**.  
The Schedule Job page appears.

Schedule Job


×



DI INFORMATION



CATALOG INFORMATION



JOB INFORMATION

Connector Name

▼

System Name

▼

Environment Name

▼

NEXT >

4. Set up job parameters as follows:

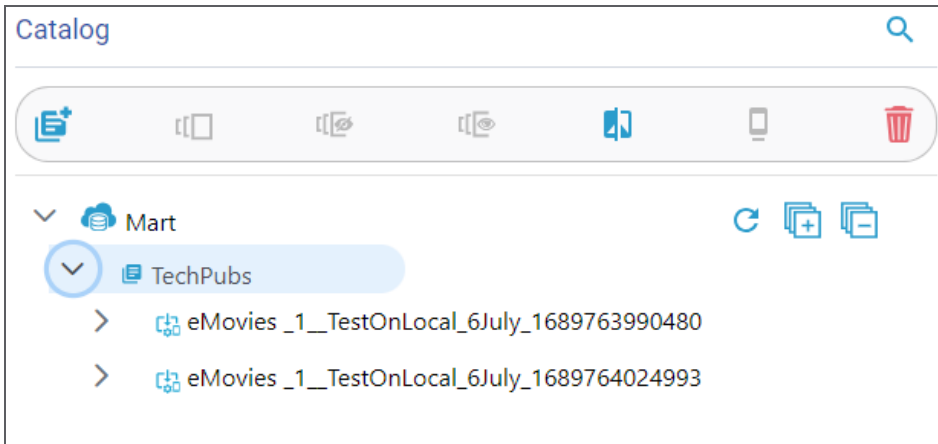
Tab	Field	Description
DI Inform- ation	Connector Name	Select a configuration to use for the import job.
	System Name	Select a system from the list of available systems based on your DI configuration
	Environment Name	Select one or more environments from the list of available environments based on the selected system.
Catalog Information	Select Models	Select the mart catalog/library to import models to.

Tab	Field	Description
Job Information	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 check box to run the job immediately.

- Click **Submit**.

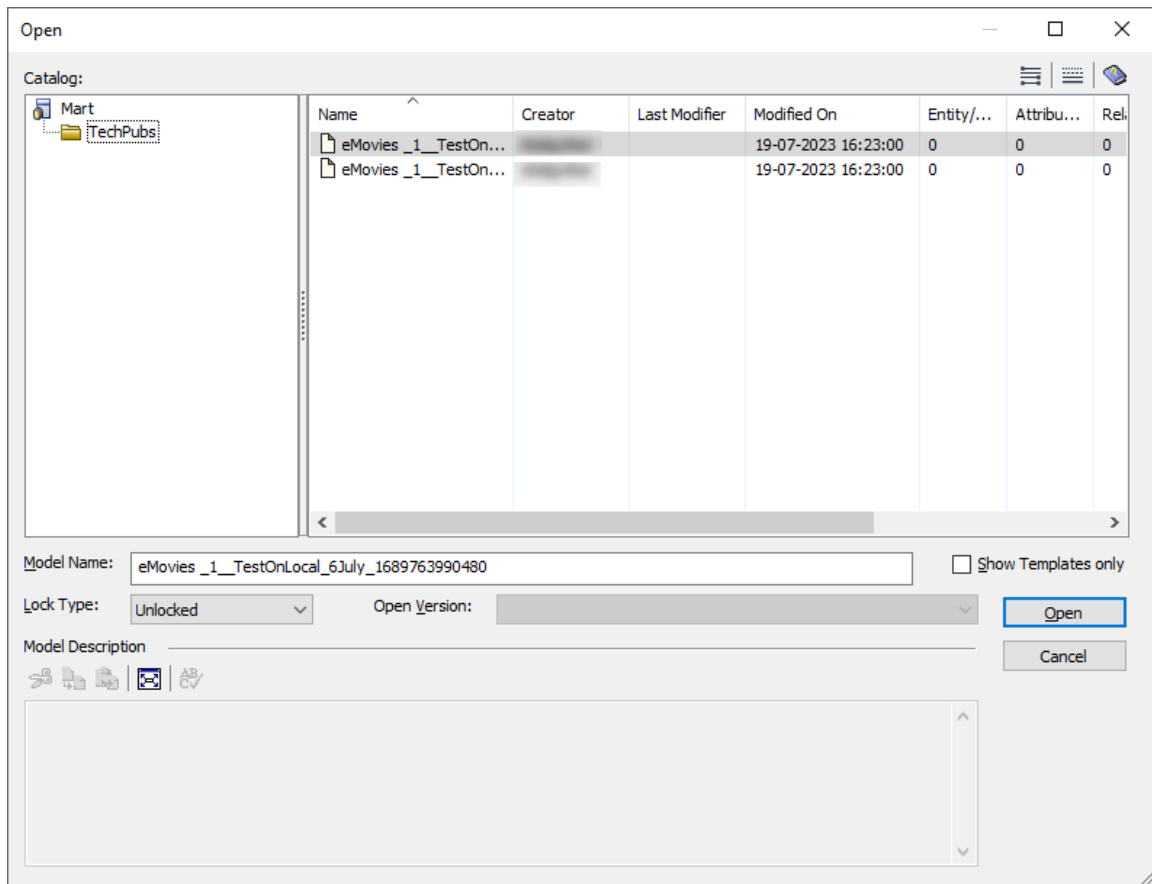
The job is added to the calendar for execution with its **Job State** set to Scheduled.

On successful job completion, the imported model is added to the selected library in the original erwin DI format. To use this model, you must convert it to erwin DM format.

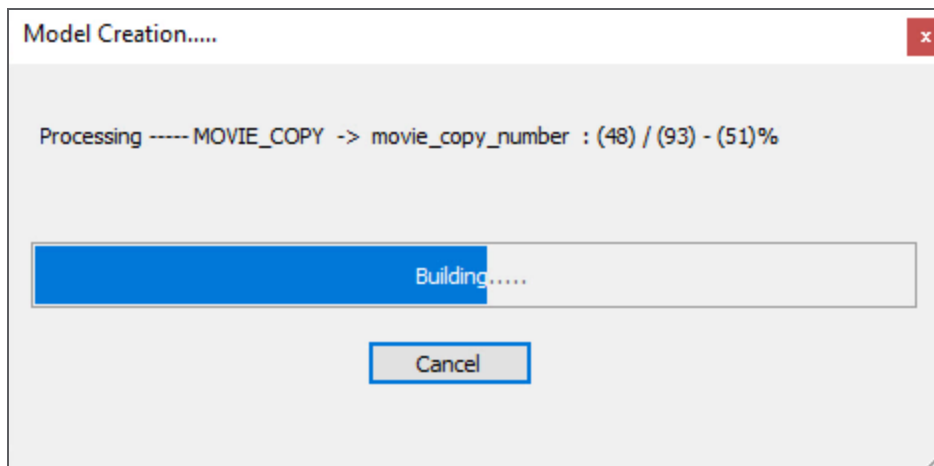


To convert an imported model to erwin DM format, follow these steps:

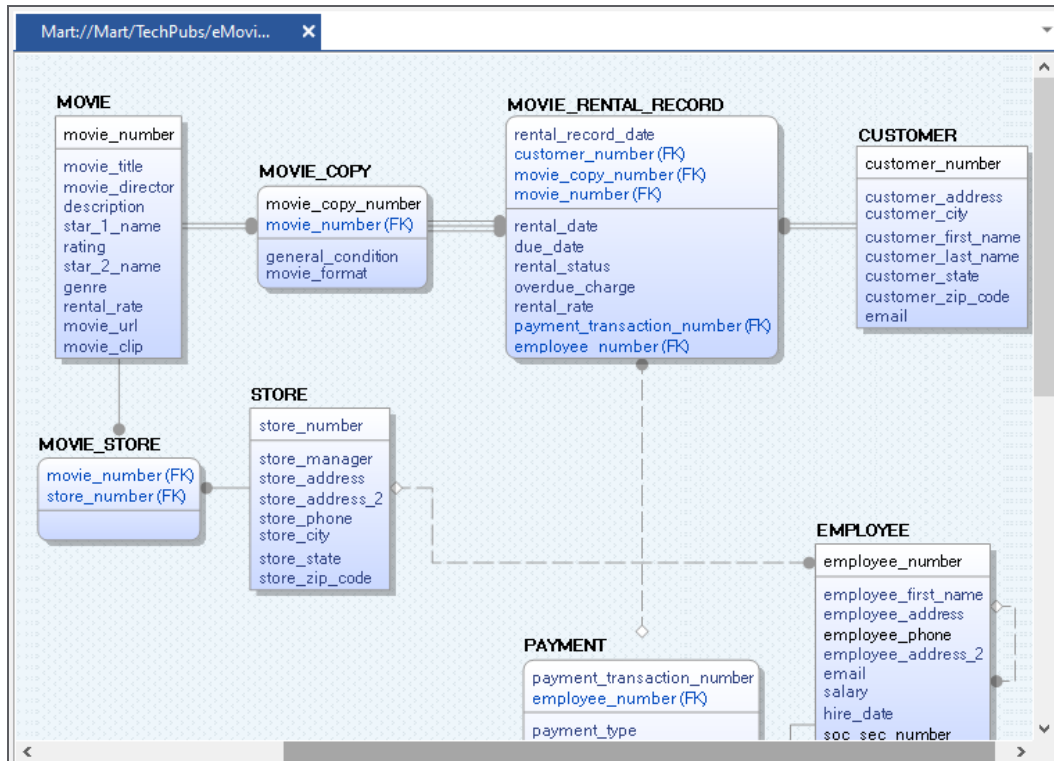
1. Start erwin DM and connect to your mart.
2. On the ribbon, click **Mart > Open**.



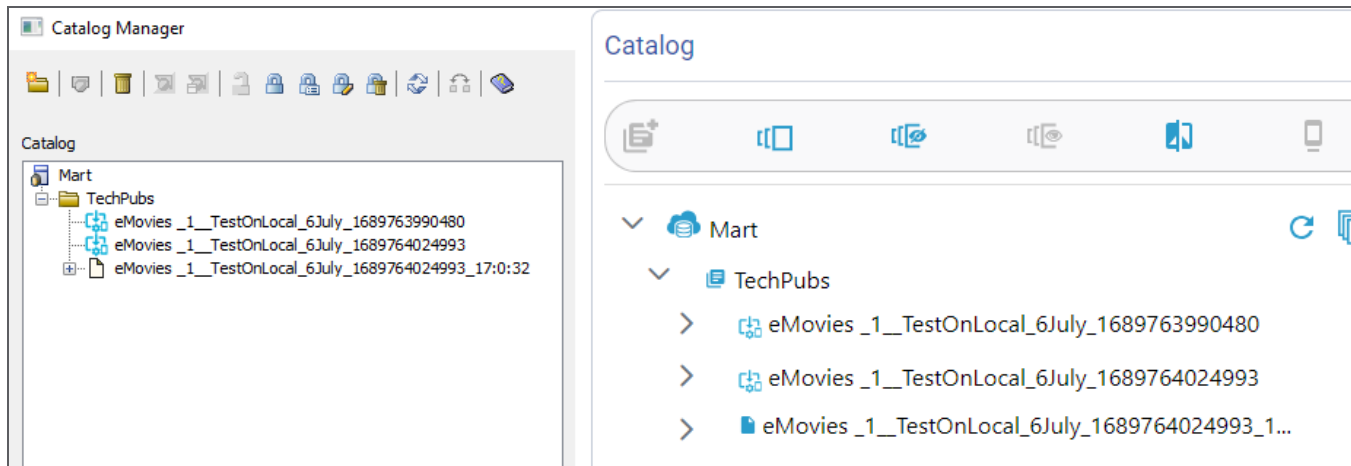
3. Select the required model and click **Open**.  
The process to convert the imported model to the erwin DM format runs.



Once this process is complete, the model is converted to .erwin format and opened in the diagram editor.



This model is saved to your mart catalog in the .erwin format with a time stamp. The following image shows the saved model in the Catalog Manager and in your mart library.



Once a job is set up, you can use the following options on it:



- **Run Job:** Use this option to run a scheduled recurring job immediately.
- **Manage Job:** Use this option to 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 canceled, 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.
- **Refresh Job:** Use this option to refresh the job state.
- **Cancel Job:** Use this option to cancel a scheduled or running job.
- **Delete Job:** Use this option to delete a job from the job list.
- **View Log:** Use this option to view a job's log. In case of failures, you can use the log to troubleshoot.

# Data Sharing in DM Connect for DI

For data to be shared between erwin Data Modeler and erwin DI, 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
Library/Catalog Name	System Name
Description	Business Purpose

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

TABLE-TABLE	
erwin Data Modeler	erwin DI
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
Domain Parent	Data Domain

COLUMN-COLUMN	
erwin Data Modeler	erwin DI
Physical Data Type	Data Type, Precision, Length, Scale
Null Option	Nullable Flag
Foreign Key	Foreign Key Flag
Primary Key	Primary Key Flag
Child Column Name	Foreign Key Column Name
Child Table Name	Foreign Key Table Name

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

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



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

DATA MOVEMENT SOURCE-MAPPING	
erwin Data Modeler	erwin DI
Data Source DBMS Type	Database Type
DS Transformations	Business Rule
Library	Target System
Model	Target Environment

DATA MOVEMENT SOURCE-MAPPING	
erwin Data Modeler	erwin DI
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 Movement Table)	Source Table
Source Column (Or Data Movement Column)	Source Column
Source Column Datatype (Or Data Movement Column Datatype)	Source Column Datatype and length Check whether datatype and length are added to the corresponding fields. If not, you need to correct it manually.

# Harvesting Catalogs to erwin ER360

You can harvest a single model, a library, or the complete catalog to erwin ER360. To schedule harvesting jobs, you must be an administrator with data harvesting permissions.

By default the Harvest to ER360 page is 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:









1. In the header pane, click . Then, click **Harvest to ER360**.

This option is available only if you have a license for erwin ER360 and have initialized it.

The Harvest to ER360 page appears.

[Home](#) / [Harvest to ER360](#)

## Harvest to ER360



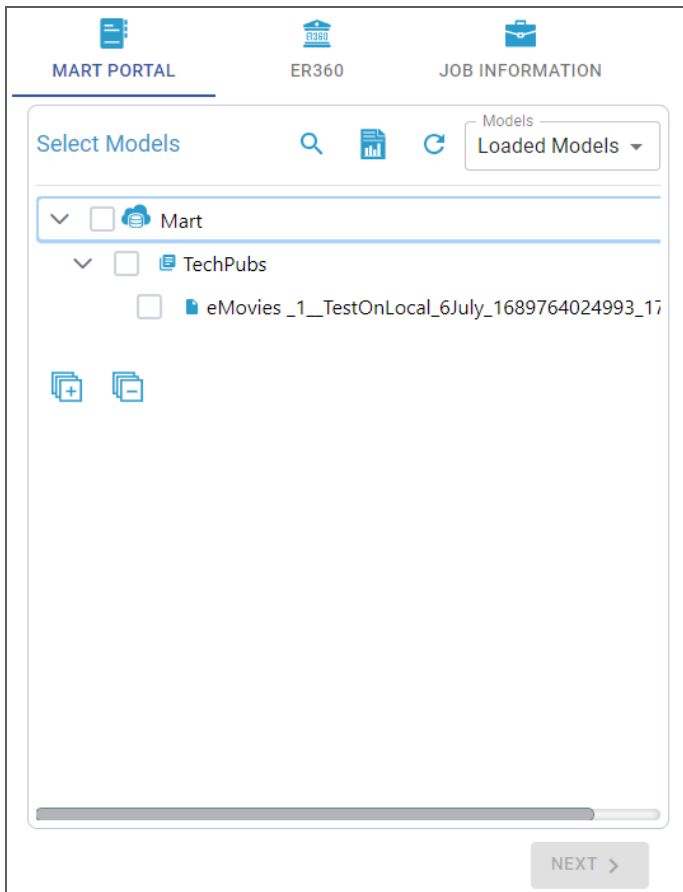
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Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17

2. Click .



The screenshot shows the 'MART PORTAL' tab selected. Below the tab are three icons: a document, a building, and a briefcase. The 'Select Models' dialog is open, featuring a search bar, a 'Models' dropdown menu set to 'Loaded Models', and a list of models. The 'Mart' model is expanded, showing 'TechPubs' and 'eMovies\_1\_\_TestOnLocal\_6July\_1689764024993\_17'. There are plus and minus icons for expanding/collapsing the list. A 'NEXT >' button is at the bottom right.

3. Set up job parameters as follows:

On the Mart Portal tab:

Select Models

Select models from mart catalog to export.

To view selected models, click .

Models

Select whether all available models are displayed in the list or only the ones that are loaded.

On the ER360 tab:

Select Libraries

Select library in erwin ER360 to which you want to harvest models.

Match Mart Path

Specify whether the path structure of the model after harvesting must match the path structure in mart catalog.

Import Options

Select a suitable export option:

- **Add & Update:**
  - If a model exists, this option adds any new data to it.
  - If a model does not exist, this option adds the model.

- **Delete & Reload:**

This option deletes all data. Then, it harvests it again.

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.

4. Click **Submit**.

The job is added to the calendar for execution with its **Job State** set to Scheduled. Once the job is successful, your data is harvested to erwin ER360.

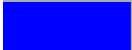



The screenshot displays the 'Catalogs' management interface. On the left, the 'Catalogs' panel includes a search icon, a 'Loaded Catalogs' dropdown menu, and a list of catalogs with icons for adding, editing, and deleting. The 'eMovies' catalog is selected. On the right, the 'Catalog Details' panel shows the configuration for the 'eMovies' catalog, including its name, creation date and time, creator, description, last imported version, source path, and current status.

Once a job is set up, you can use the following options on it:

- **Run Job:** Use this option to run a scheduled recurring job immediately.
- **Manage Job:** Use this option to 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 canceled, 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.
- **Refresh Job:** Use this option to refresh the job state.
- **Cancel Job:** Use this option to cancel a scheduled or running job.

- **Delete Job:** Use this option to delete a job from the job list.
- **View Log:** Use this option to view a job's log. In case of failures, you can use the log to troubleshoot.

Job status is indicated by the following colors:

Color	Job Status
	Scheduled
	Successful
	Running
	Failed



# Configuring Mart Settings


You can configure the following settings in the Settings module (

- [General](#)
- [Logs](#)
- [erwin Data Intelligence Configuration](#)
- [Mart Portal Deletion](#)

Typically, you configure the settings when you log in to Mart for the first time. However, you can change them whenever you want.

# General Settings

To configure general settings, follow these steps:

1. On the application menu, click .  
The Mart Settings page appears.

General
View Logs
DI Configurations
Delete Mart Portal

### Default profile for model creator

Select Profile

No default profile

### Default Selector for User

Select User

Username

### Email Notification Settings

☐ Use SMTP Settings

SMTP host name

Port Number  
-1

☐ Authenticate
☐ Use TLS Connection

Username

Password

Administrator Email

No-reply Email

### Device Tracking

☒ Enable Device Tracking

### Harvest Permission

☒ Enable Harvest Permission

- Configure mart settings parameters as follows:


Field	Description
Default profile for model creator	Specifies the profile that is assigned to a user on a model. This profile is assigned whenever a user creates a model and saves it to Mart for the first time. The user inherits the permissions of the default profile selected here on the model that is saved. For example, suppose that User1 is assigned with Modeler profile and

Field	Description
	the System Administrator selects Architect as the default profile for model creator. If User1 creates Model1 and saves it to Mart, for Model1, User1 inherits the permissions of Architect. Now, suppose that the System Administrator selects Viewer as the default profile for model creator, and suppose that User1 creates Model2 and saves it to Mart. For Model2, User1 inherits the permissions of Viewer.
Default Selector for User	Specifies default selector for the user. For example, If you select Email Address as your default selector, instead of username, Email address appears in home, catalog, permission, log, and session page of the erwin Mart Portal.
Use SMTP Settings	Specifies whether SMTP settings are configured for email notification through the application.
SMTP host name	Specifies the name of the SMTP host. Enter the name in the <i>mail.-domain.com</i> format. Notification emails are sent from this server.
Port number	Specifies the port number of the SMTP server. The default port number is -1. If your company is using an alternate port number for the mail server, specify that port number.
Authenticate	Specifies whether transactions with the SMTP server are authenticated. Select the check box to authenticate.
Username	Specifies the user name to authenticate the SMTP server. Select the Authenticate check box to enable authentication.
Password	Specifies the password to authenticate the SMTP server. Select the Authenticate check box to enable authentication.
Administrator email	Specifies the email ID of the Mart administrator. Notifications to Mart users are sent from this ID.
No-reply email from	Specifies the email ID from which administrative emails such as the password reset email are sent. This field is disabled if you select the Use TLS Connection check box.
Use TLS Connection	<p>Specifies whether transactions with the SMTP server use a Transport layer Security (TLS). If you intend to use a TLS connection, ensure that the User name and Administrator email correspond to each other.</p> <p>Select this option only if you want to use a TLS connection.</p> <p>Also, if you intend to use the TLS connection for a Gmail account, ensure that you do the following:</p> <ol style="list-style-type: none"> <li>1. Sign in to your Google account and go to the <b>My Account</b> page.</li> </ol>

Field	Description
	2. Next, go to the <b>Sign-in &amp; security settings</b> page and set the <b>Allow less secure apps</b> setting to ON.
Enable Device Tracking	Specifies whether the devices on which you log in to your mart account are tracked and logged.
Enable Harvest Permission	Indicates that only those erwin ER360metadata harvest jobs are visible to you that you created.

3. Click **Submit**.

Mart options are configured.

If SMTP server is not configured, an Administrator can reset a user's password manually via the Users Page. On the Users page, select a user and click . Enter a new password and click **Submit**.

# Manage Logs

For every action that is performed by a mart user, an action log is saved to the mart database. As a mart administrator, use logs to view records of user actions. Note that these actions are not saved in a log file.

To manage logs, follow these steps:

1. Go to **Application Menu > Settings > View Logs**.

The Log Report page appears. Depending on your Mart account rights, logs are available.

Log Report							
Username	EmailId	Action	Category	TimeStamp	Type	SessionId	SessionType
george	George...	Succ...	Authentication	Thu Aug 26 2021 11:01:43	INFO	20	Server User
olivia	Olivia@q...	Succ...	Authentication	Thu Aug 26 2021 11:01:39	INFO	19	Server User
olivia	Olivia@q...	User...	Authentication	Thu Aug 26 2021 11:01:31	ERROR	19	Server User
olivia	Olivia@q...	Succ...	Authentication	Thu Aug 26 2021 11:01:31	INFO	19	Server User
jacob	Jacob@...	Succ...	Authentication	Thu Aug 26 2021 11:01:19	INFO	18	Server User

Use the following options to work on log report:

Download CSV (  )

Use this option to export all logs to CSV file.

View Columns (  )

Use this option view the selected columns in the log report.

Filter Table (  )

Use this option to filter logs based on username, log category, time stamp, log type, and session.

Generate report(  )

This option is to generate a log report based on specific parameters.

Clear Logs (  )

Use this option is to clear logs. You can do one of the following:

- To clear all logs, select **Clear All Logs**.
- To clear logs within a date range, select **Clear logs within range**. Then, select the **Start** and **End** dates.

Download Excel (  )

Use this option to export all logs to an MS Excel file.

# Mart Portal Log Files

You can find erwin Mart Portal log files at the following locations:

- **erwin Mart Portal as server:**
  - {user.home}/AppData/Local/erwin/Mart Portal/logs/martportal.log
  - {user.home}/AppData/Local/erwin/Mart Portal/logs/martportalupgrade.log
  - {user.home}/AppData/Local/erwin/Mart Portal/logs/vaultservice.log
- **erwin Mart Portal as Windows service:**
  - C:\Windows\System32\config\systemprofile\AppData\Local\erwin\Mart Portal\logs\martportal.log
  - C:\Windows\System32\config\systemprofile\AppData\Local\erwin\Mart Portal\logs\martportalupgrade.log
  - C:\Windows\System32\config\systemprofile\AppData\Local\erwin\Mart Portal\logs\vaultservice.log

This section contains the following topics

[Generate Log Files on the Mart Portal](#)

[Enable Logging in Local AppData](#)

## Generate Log Files on the Mart Portal

Mart Portal can generate log files and you can configure how the log is generated.

Follow these steps:

1. Navigate to C:\Program Files\erwin\Mart Portal\MartApp\config folder and locate the log4j-portal.xml file. Similarly, you can edit log file parameter for log4j2-er360, and log4j2-vaultservice to configure log files for ER360, and Vault services respectively.

2. Modify the values for the following parameters as required:

### Priority value

Specifies the level of logging. The priority value parameter can take the following values:

Off

Specifies that no log is generated.

Info

Specifies that a log is generated for every event.

Error

Specifies that a log is generated when an error occurs.

### File Name

Specifies the path to the log file and the name of the log file. For more information about the file path, refer to the Mart Portal Log Files topic.

The maximum size of the log file is 1 MB. If the file exceeds the maximum size, another log file is created in the same location. When multiple log files are generated, the filenames include the serial number of the file in ascending order.

3. Save the file.
4. Restart the Mart Portal service.



## Enable Logging in Local AppData

To enable logging in a user's AppData while using Mart Portal as a Windows Service, do the following:

1. Once the service is created, go to service properties.
2. On the Log On tab, click This Account.
3. Enter the credentials.
4. Start the service.

Logging is now enabled for your instance of Mart Portal as a Windows service. The log file, will be created at file path mentioned in the Mart Portal Log Files topic.

# erwin Data Intelligence Configuration

To import and export data models, data sources, and naming standards using DM Connect for DI, you need to configure your erwin Data Intelligence (erwin DI) application in erwin Mart Portal.

To configure erwin DI, follow these steps:

1. Go to **Application Menu > Settings > DI Configurations**.

The Configurations page appears.

Configurations								
Name	Server Name	Application Name	Configurations	SSL	Username	Password	Timeout	Actions
No records to display								

2. Click .

The Add Configuration page appears.

Add Configuration

Configuration Name \*


Server Name \*

Application Name \*

Port \*

Enable SSL \*  
False

Username \*

Password \* 

Session Timeout \*  
1440

TEST

CANCEL

SUBMIT

3. Configure your erwin DI connection parameters as follows:

Field	Description
Configuration Name	Specify a unique name for the configuration.
Server Name	Specify the server address, where erwin DI is installed.
Application Name	Specify the name of your erwin DI Application.
Port	Specify the port on your server that is used for erwin DI.
Enable SSL	Specify whether you want to connect to the server through a

Field	Description
	secured connection
Username	Specify your erwin DI user name.
Password	Specify your erwin DI password.
Session Timeout	Specify erwin DI's session time out duration in minutes.

4. Click **Submit**.

Your connection is tested and saved. You can set up multiple erwin DI configurations and use them as required.

# Delete Mart

As a mart portal administrator, you can delete Mart.

If you delete Mart, all your libraries, models, and the associated data will be deleted permanently.

Follow these steps:

1. Go to **Application Menu > Settings > Delete Mart Portal**.

## Attention

**Deleting the mart will permanently delete all data from erwin Mart Portal and erwin ER360. Do you want to proceed?**

Type YES to confirm

SUBMIT

2. Type YES and click **Submit**.

Mart is deleted and the Initialize Mart page appears.

## Set session time-out

You can set the session time-out for a erwin Mart Portal using the session configuration file. The following procedure does not apply for setting session time-out for an erwin user from a client application.

Follow these steps:

1. Navigate to the Mart Portal installation folder at:  
`"C:\ProgramData\erwin\Mart Portal"`
2. Locate and open the MartConfiguration.properties file using a text editor such as Notepad.
3. Change the tokenvalidity value to set the session time-out. The default timeout value is 4 hours.

Do not modify values other than tokenvalidity. Modifying other configuration values may result in undesirable session configuration settings.

4. Save the file.
5. Restart the web server.

The updated session timeout value is applied from the next session.

# Customize Mart Emails

The Mart sends automated emails for the following events:

- When you reset a password
- When a user uses the Forgot Password option
- When you add a server user or a Windows user
- When you change the email address of a user

You can customize the subject and body of these emails to suit the requirements of your organization.

Follow these steps:

1. Navigate to the Mart Portal installation directory and locate the *email-templates.xml* file.

Typically, this file is available in the following location:

```
C:\Program Files\erwin\Mart Portal\MartApp\config
```

2. [Optional] Create a folder named Backup on your computer and copy the email-templates.xml file to the folder.

You can use the file in the Backup folder to revert to the original contents.

3. Open the email-templates.xml file using Notepad or a similar XML editor.
4. Locate the event for which you want to customize the email.

Events are included between the <Name> and </Name> tags, within the <template> and </template> tags.

5. To change the subject of the email, change the text that is available between the <Subject> and </Subject> tags.
6. To change the body of the email, change the text that is available between the <Content> and </Content> tags.

**Important!** Do not change anything that includes a % or an & symbol. Modifying such predefined tokens may break the code and may disable user accounts.

7. Save the XML file.
8. Restart the Web server.

The updated email template is used when the event occurs the next time.

# Glossary

## B

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### **Batch target**

A special target that lets you build and/or publish multiple other targets in a single group (or "batch"). You can schedule batches to run at any time.

### **Block snippet**

A snippet that is created out of one or more paragraphs.

## C

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### **Condition tag**

A marker that you can apply to different areas of your content so that some sections show up in some of your outputs but not in others.

### **Cross-reference**

A navigation link that lets you connect text in one topic to another topic (or a bookmark within a topic). Cross-references let you create "automated" links that are based on commands you provide. This allows you to keep links consistent and change them in just one place by using the "xref" style.

## D

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### **Drop-down text**

A feature that lets you collapse content in your topic. The content is expanded (and therefore displayed) when the end user clicks a link.

## F

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### **Footnote**

A comment that is used to explain a specific area of the text. Both the area in the text and the comment contain a number or symbol that ties the two together. A footnote (or endnote) comment can be placed at the end of a page, document, chapter, section, or book.



## S

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### Single-Sourcing

Reusing content and producing multiple outputs from the same set of source files. Flare lets you single-source your projects in many ways, using various features. This includes features such as topic-based authoring, conditions, snippets, variables, multiple tables of contents, and more.

### Snippet

A pre-set chunk of content that you can use in your project over and over. Snippets are similar to variables, but snippets are used for longer chunks of content that you can format just as you would any other content in your topic. In snippets, you can also insert tables, pictures, and whatever else can be included in a normal topic.

### Span

A tag that is used to group inline elements to format them with styles. A span tag doesn't perform any specific action; it simply holds the attributes (e.g., font size, color, font family) that you apply to inline content.

### Style

An element to which you assign a certain look and/or behavior. You can then apply that style to your content. Different kinds of styles are available in a stylesheet, to be used for various purposes in your content.

## T

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### Table

A group of intersecting columns and rows that you can add to a topic for various purposes, such as comparing one thing with another or giving field descriptions for a software dialog.

### Target

One "instance" of an output type. When you build your final output, you are essentially building one or more of the targets in your project.

### Text snippet

A snippet that is created out of a portion of one paragraph.

### Topic

A chunk of information about a particular subject. Topics are the most important part of a project. Everything else is contained within topics (e.g., hyperlinks, text, pictures) or points toward topics (e.g.,

table of contents, index, browse sequences). The very reason end users open a Help system is to find information, a little direction. They find that help within individual topics.

## V

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### Variable

A pre-set term or content that you can use in your project over and over. Variables are similar to snippets, but variables are used for brief, non-formatted pieces of content (such as the name of your company's product or your company's phone number).

## X

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### XML Editor

The window in the Flare interface where you can add content and formatting to elements such as topics and snippets.