



erwin ER360

Playbook

Release 15.0

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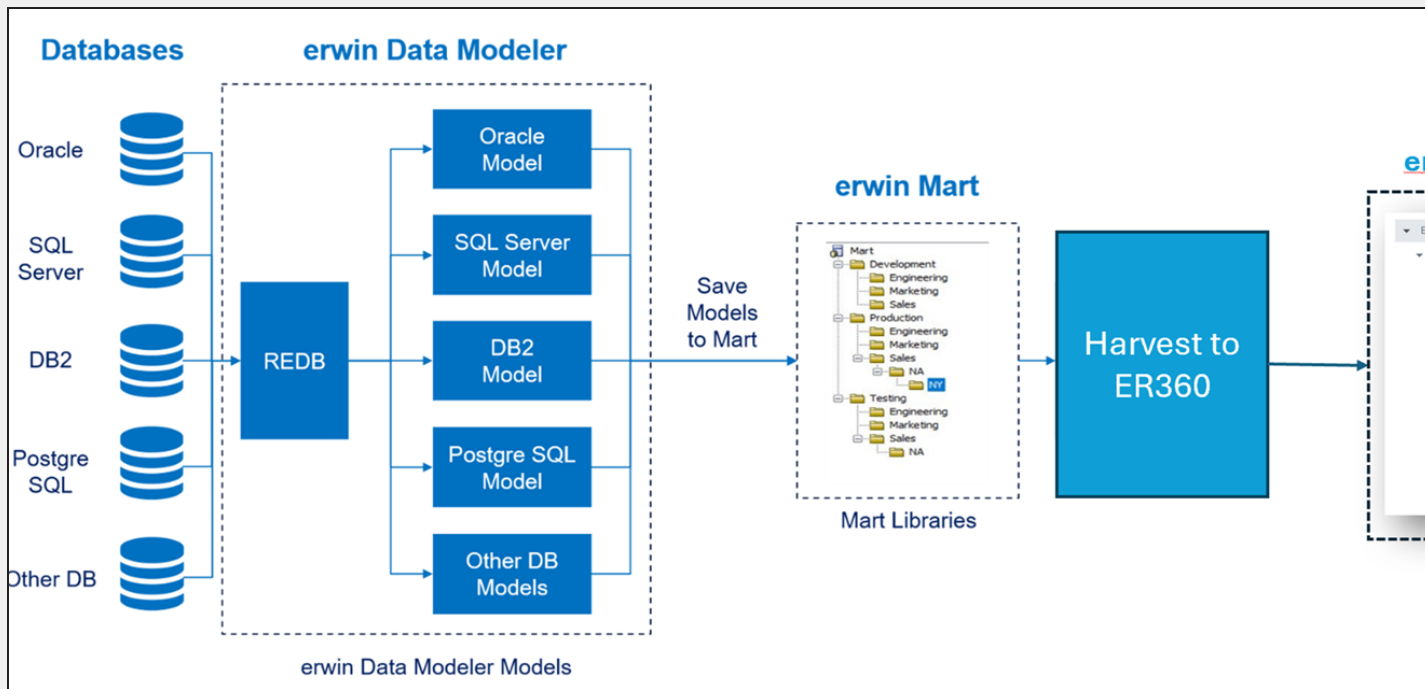
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erwin ER360 Playbook

erwin ER360 provides unified and central visuals of your erwin data models to help you manage, review, and govern your on-premises or SaaS 'On Cloud Mart' data models. It provides self-service access to visualization and detailed metadata classification to encourage business teams, governance teams, and other stakeholders to collaborate and increase data literacy. erwin ER360 is a separately licensed component of the erwin Mart Portal solution. It is available in two flavors, on-premises, and on-cloud. For more information or queries about erwin ER360 on cloud, contact erwin Support (open in new tab or window). You can also use erwin ER360 with an offline license. For more information on offline licenses, contact license support This playbook walks you through erwin ER360 with real-time use case.

Workflow

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



To get started, refer to the [Transitioning eMovies using erwin ER360: DVD Rental to OTT](#) topic.

Transitioning eMovies using erwin ER360: DVD Rental to OTT

The erwin ER360 playbook walks you through the transition of the eMovies model from the DVD rental format to OTT format via the following use cases:

- [Use case 1: Transition using erwin ER360, erwin Mart Portal, and erwin Data Modeler](#)
- [Use case 2: Use Collections & Worksheets to manage legacy cleanup and PII](#)
- [Use case 3: Manage access to sensitive models using Profiles and Permissions](#)
- [Use case 4: Manage enterprise-level data architecture diagram](#)
- [Use case 5: Use erwin ER360 with Jira integration](#)

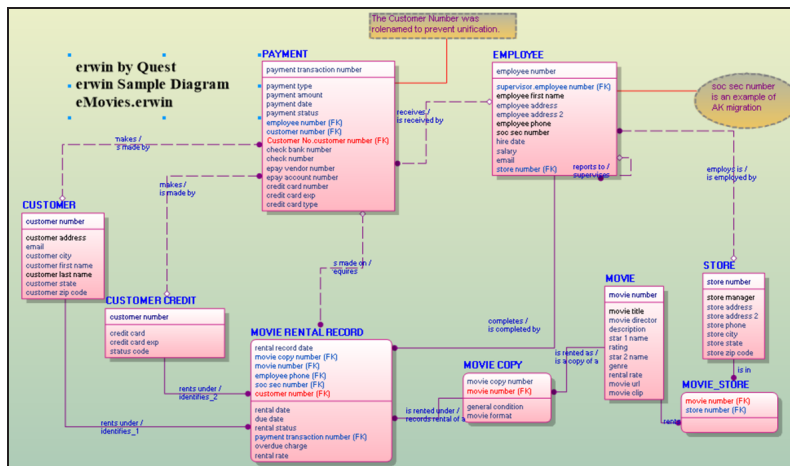
Use Case: Transitioning using ER360, Mart, and DM

Executive Summary

- Overview of eMovies' Business Evolution: EMovies started as a DVD rental company, gradually transitioning into a full-scale OTT streaming platform. This business shift required fundamental changes in its data architecture to support streaming, global reach, personalization, and scalability.
- Importance of Adapting the Data Model: As the business model changed, the data architecture needed to evolve from managing physical inventory (DVDs) to managing digital assets (streaming content, user preferences, recommendations).
- erwin Data Modeler's Role: erwin Data Modeler facilitates this transition by providing robust tools for visualizing, updating, and managing complex data models as business requirements evolve.

Current Situation Analysis (Past Data Model in erwin)

Core operations: DVD inventory management, rental queues, shipments, and returns.



Core entities in the existing data model are:

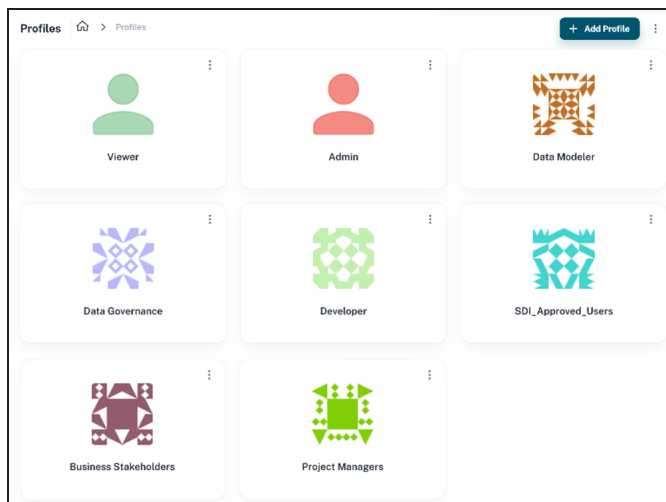
Use Case: Transitioning using ER360, Mart, and DM

Entity Name	Description	Key Attributes
Customers	Stores customer data such as name, contact information, account creation date, membership status.	Customer ID (Primary Key), Name, Address, Membership Type (e.g., Basic, Premium), Date of Registration, Email and Contact Information
Customer Credit	Tracks credits are available to customers for late returns, promotions, or account balance adjustments.	Customer Credit ID (Primary Key), Customer ID (Foreign Key), Credit Balance, Credit Expiration Date
Employee	Manages employee data for the stores or distribution centers, including roles such as sales associates, managers, and customer service.	Employee ID (Primary Key), Name, Position (e.g., Manager, Sales Associate), Store ID (Foreign Key), Contact Details
Movie	Holds the details of the movies available for rent in the catalog, such as genre, rating, and release year.	Movie ID (Primary Key), Title, Genre, Release Date, Rating (e.g., PG, R), Director
Movie Copy	Represents physical copies of movies available in stores or distribution centers.	Movie Copy ID (Primary Key), Movie ID (Foreign Key), Store ID (Foreign Key), Condition (e.g., New, Used), Availability Status (e.g., Available, Rented)
Movie Rental Record	Tracks each rental transaction, including rental date, return date, and the copy of the movie rented.	Rental ID (Primary Key), Customer ID (Foreign Key), Movie Copy ID (Foreign Key), Rental Date, Due Date, Return Date, Late Fees (if applicable)
Movie Store	Stores information about physical movie stores where customers can rent DVDs or return them.	Store ID (Primary Key), Name, Address, Manager ID (Foreign Key), Phone Number
Payment	Captures payment details for rental transactions, including amount paid, payment method, and payment date.	Payment ID (Primary Key), Rental ID (Foreign Key), Amount Paid, Payment Method (e.g., Credit Card, Cash), Payment Date
Store	Represents the different EMovies distribution centers or physical stores where DVDs are stored and managed.	Store ID (Primary Key), Location, Number of Employees, Inventory Capacity, Manager Contact Information

Transition Strategy: From DVD Rental to OTT Data Model

Key Participants in the Transition:

You can setup different profiles in ER360 to add Participants. For this example, we are setting up the following profiles in ER360. You will get Viewers and Admin profiles by default. To set up new profiles you can click on add profile button. You can also add permissions for existing profile.



- Data Modelers
- Business Stakeholders
- Development Team
- Data Governance Team
- Project Managers
- SDI Approved Users

Transition Phase:

During the Transition phase the eMovies team starts using the erwin ER360 to review the current data model of eMovies to gather requirements for changes required for transition.

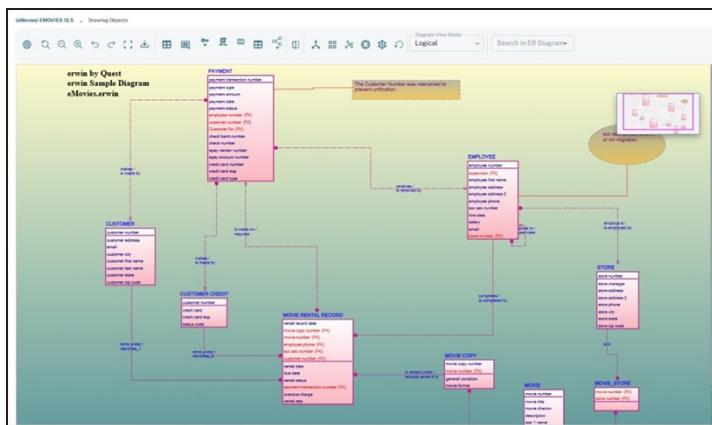
Phase 1: Planning and Assessment

Goal: Identify key requirements for transitioning from DVD rentals to OTT.

Involvement:

Use Case: Transitioning using ER360, Mart, and DM

- Data Modelers:
 - Harvest the eMovies model into ER360 and share it with the business stakeholders.
 - Analyze the existing DVD data model (Customers, Movie Rental Record, Store) and identify obsolete entities. Evaluate new data model requirements (digital content, streaming history).
- Business Stakeholders:
 - Provide business inputs such as the need for multi-profile support, global reach, personalized recommendations, and new subscription plans.
 - Add comments to the ER Diagram suggesting the changes.
- Project Manager:
 - Set up timelines, resource allocation, and coordination between business and tech teams.



Summary of Changes

- New Entities: Profiles, Streaming History, Devices, Content Recommendations, Licensing.
- Modified Entities: Users (formerly Customers), Digital Content (formerly Movie), Payments, Subscription Plans.
- Deprecated Entities: Movie Copy, Movie Rental Record, Movie Store, Store, Customer Credit.

These changes reflect the fundamental shift from managing physical media and rental transactions to digital content streaming, personalization, and global accessibility, all supported by a scalable and dynamic data architecture in erwin Data Modeler.

Use Case: Transitioning using ER360, Mart, and DM

Entity Name	Description	Key Attributes	Changes from Previous Model
Users	Now supports multiple user profiles under a single account for personalized recommendations and multiple viewers.	User ID (Primary Key, Previously Customer ID), Primary Account Holder Name (Same), Email (Same), Password (New), Subscription Plan (Modified), Linked Profiles (New), Account Creation Date (Same), Watch History (New), Preferences (New)	Renamed from Customers, Password added, Subscription Plan modified, Linked Profiles, Watch History, and Preferences added.
Profiles	Represents individual user profiles within a single user account, enabling personalized recommendations and separate watch histories.	Profile ID (Primary Key), User ID (Foreign Key), Profile Name, Preferred Language (New), Age Rating Setting (New), Watch History (New), Content Preferences (New)	New Entity
Digital Content	Represents digital content (movies, TV shows) available for streaming.	Content ID (Primary Key, Previously Movie ID), Title (Same), Genre (Same), Release Date (Same), Rating (Same), Content Type (New), Duration (New), Language (New), Available Regions (New), License Expiration Date (New)	Renamed from Movie, Content Type, Duration, Language, Available Regions, and License Expiration Date added. Physical copy related attributes removed.
Streaming History	Logs each streaming session, tracking viewing patterns for personalized recommendations and analytics.	Session ID (Primary Key), Profile ID (Foreign Key), Content ID (Foreign Key), Stream Start Time (New), Stream End Time (New), Completion Status (New), Device ID (New)	New Entity replaces Movie Rental Record.
Devices	Captures details about devices used	Device ID (Primary Key), Profile ID (Foreign Key), Device Type (New), Operating Sys-	New Entity

Use Case: Transitioning using ER360, Mart, and DM

Entity Name	Description	Key Attributes	Changes from Previous Model
	to access EMovies, enabling management of multi-device and multi-platform streaming.	tem (New), Last Accessed Date (New), Registered Date (New)	
Subscription Plans	Updated to reflect streaming tier-based subscription plans.	Plan ID (Primary Key), Plan Name (e.g., Basic, Standard, Premium), Number of Screens (New), Max Resolution (New), Monthly Fee (Same), Allowed Devices (New)	Modified to reflect streaming tiers, Number of Screens, Max Resolution, and Allowed Devices added.
Payments	Tracks payment details for subscription-based recurring billing.	Payment ID (Primary Key), User ID (Foreign Key, Previously Rental ID), Amount Paid (Same), Payment Method (Same), Billing Cycle (New), Subscription Start Date (New), Next Billing Date (New)	User ID replaces Rental ID, Billing Cycle, Subscription Start Date, and Next Billing Date added. Focus shifted to recurring billing.
Content Recommendations	Personalized content recommendations based on user preferences, watch history, and engagement patterns.	Recommendation ID (Primary Key), Profile ID (Foreign Key), Content ID (Foreign Key), Recommended Date (New), Source of Recommendation (New)	New Entity
Licensing	Manages licensing agreements for streaming content, ensuring legal compliance, and tracking content availability by region.	License ID (Primary Key), Content ID (Foreign Key), License Start Date (New), License End Date (New), Regions Licensed (New), License Fee (New)	New Entity

Use Case: Transitioning using ER360, Mart, and DM

Entity Name	Description	Key Attributes	Changes from Previous Model
Deprecated Entities	The following entities have been phased out:	Movie Copy, Movie Rental Record, Movie Store, Store, Customer Credit	Phased out due to the transition from DVD rentals to streaming.

Now let us make changes based on the above.

Add new entities: The business users will add comments to the diagram using ER360 and suggest changes. The data Modeler will add new entity via DM Client and save changes to Mart.

Workflow for Business User to Data Modeler in ER360:

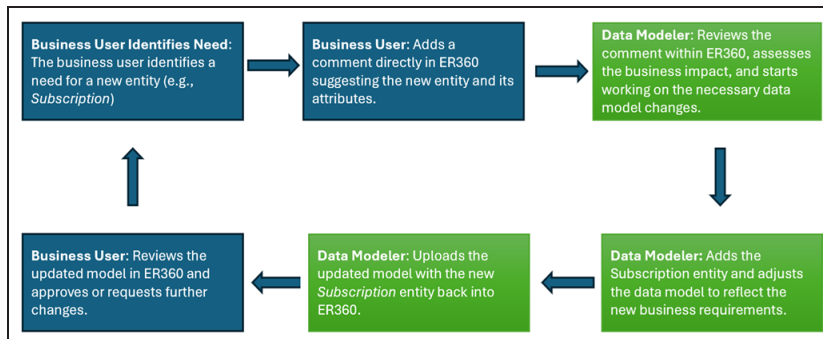
1. Business User Identifies Need for New Entity (e.g., Subscription):
 - Action: A business user identifies the need to add a new entity, like Subscription, to the model.
 - ER360 Interaction: The business user can add a comment directly in ER360, suggesting the addition of this entity.
2. Data Modeler Receives the Comment and Reviews the Suggestion:
 - Action: The data modeler reviews the comment in ER360
 - ER360 Interaction: The modeler sees the comment in context, assesses its impact, and updates the data model accordingly.
3. Data Modeler Updates the Model:
 - Action: The data modeler adds the new entity Subscription (with attributes such as Subscription ID, Customer ID, Start Date, End Date, etc.).
 - ER360 Interaction: The data modeler updates the data model and saves it in ER360, making sure all relationships and data flow are properly accounted for.
4. New Model is Loaded Back to ER360:
 - Action: After making the necessary changes, the updated model is loaded back into ER360.
 - ER360 Interaction: The new model version is saved in ER360 for further review.
5. Business User Approves Changes:

Use Case: Transitioning using ER360, Mart, and DM

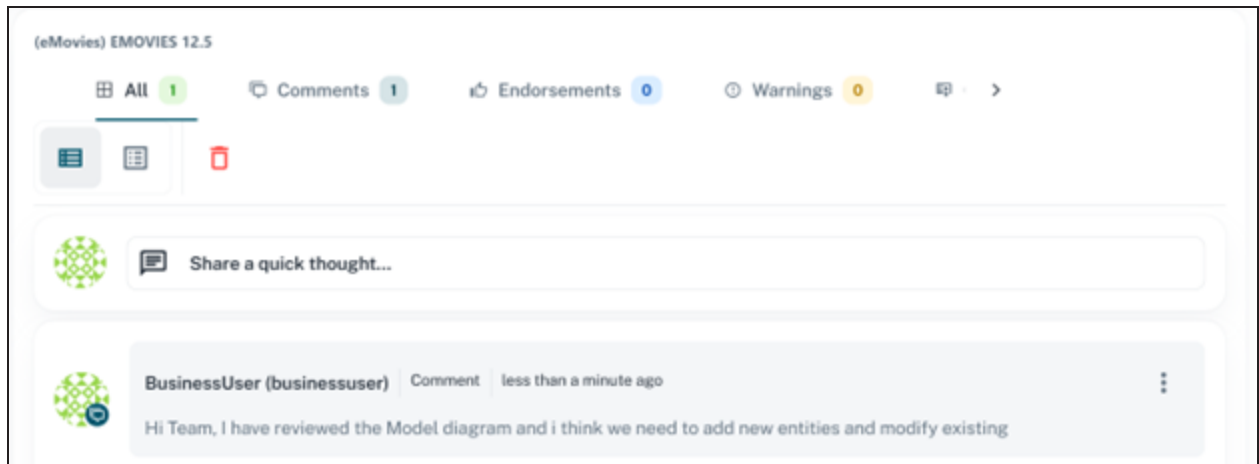
- Action: The business user receives a notification of the updated model in ER360.
- ER360 Interaction: The business user reviews the changes, including the new Subscription entity, and approves them.

6. Continuous Feedback Loop:

- Action: This feedback loop continues as business needs evolve, and new entities or modifications are required.
- ER360 Interaction: ER360 allows for ongoing collaboration between business users and data modelers, making the process agile and responsive to business needs.

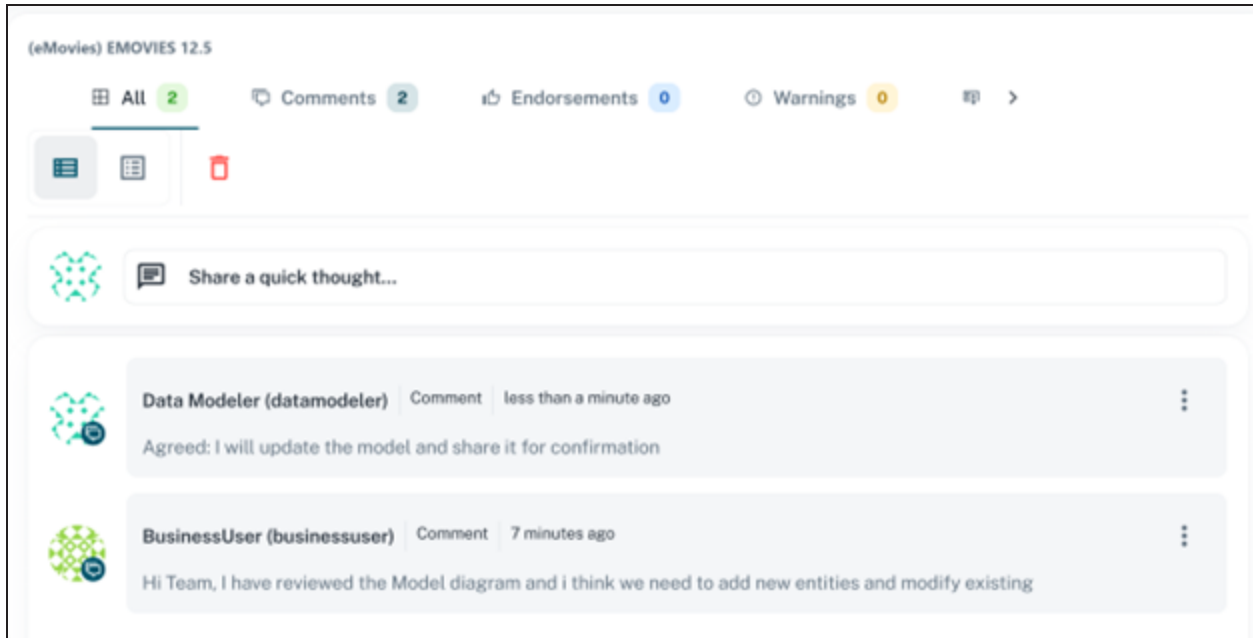


Business User Identifies Need for New Entity:

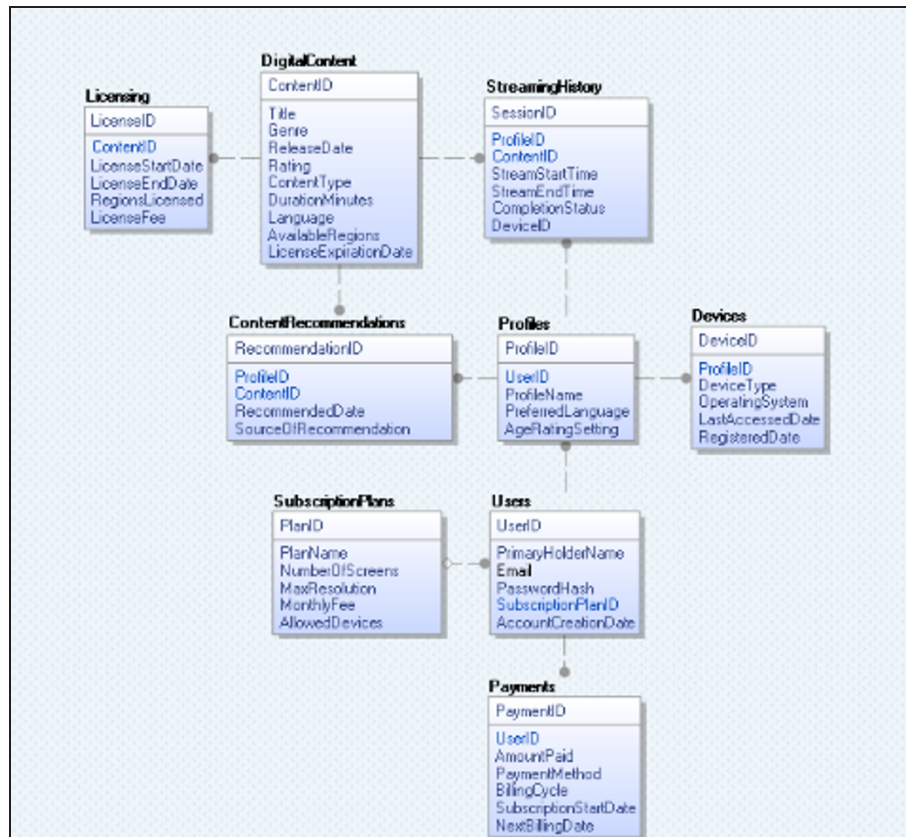


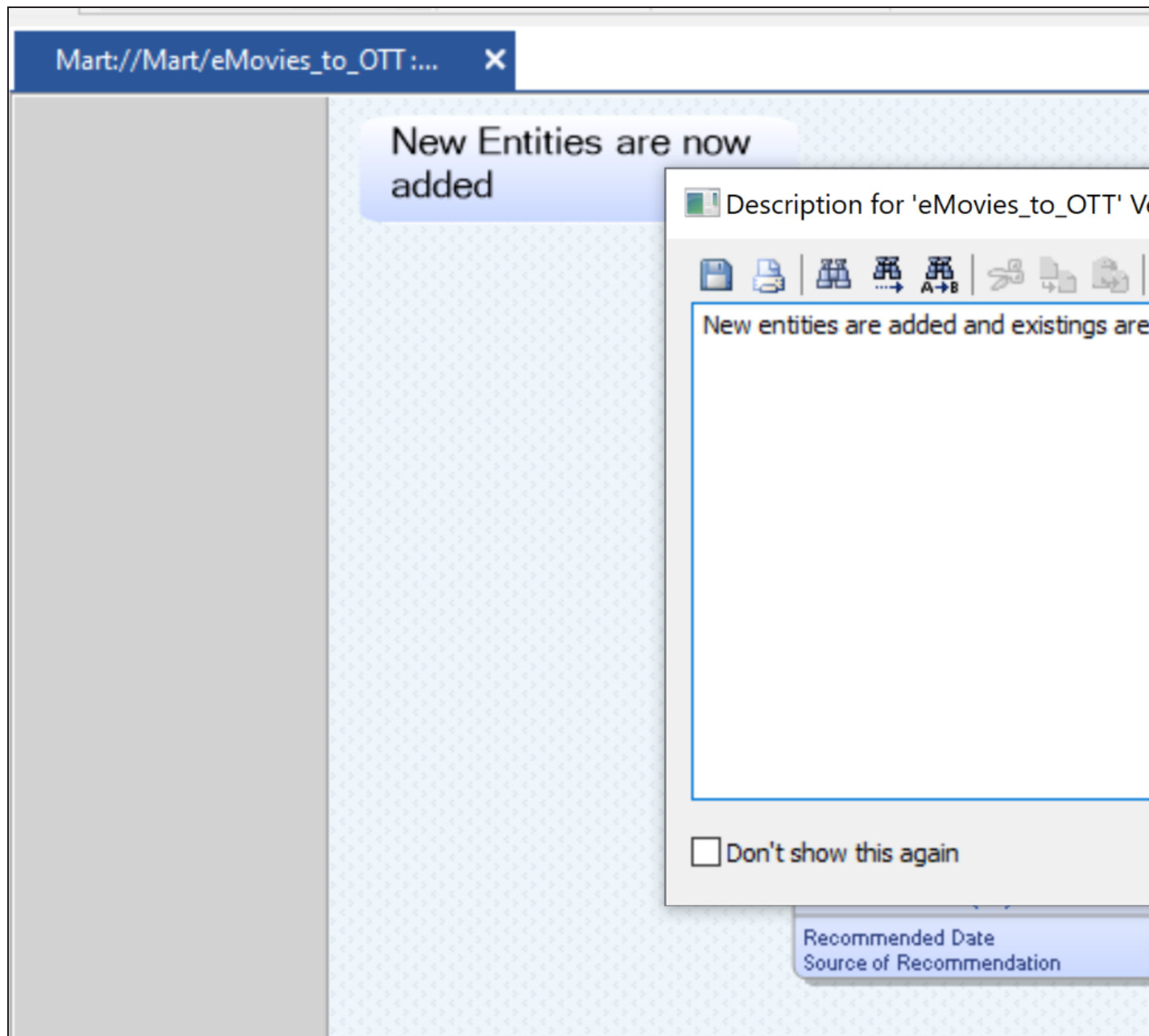
Data Modeler Receives the Comment and Reviews the Suggestion:

Use Case: Transitioning using ER360, Mart, and DM



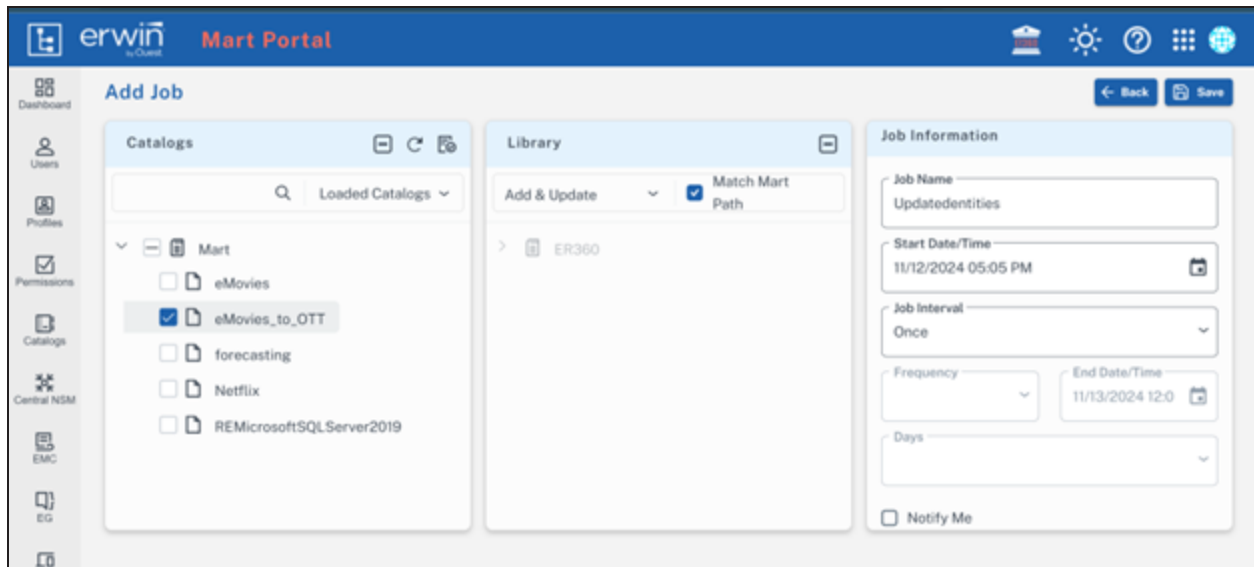
The data modeler makes the following changes to the model and uploads the model to Mart.



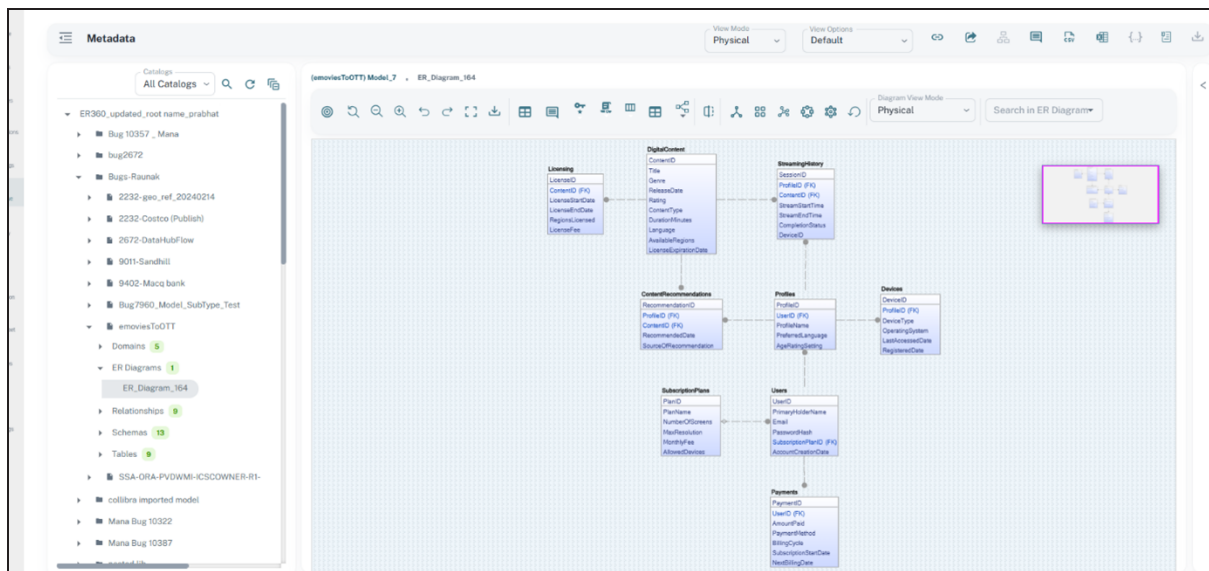


The Data Modeler provides appropriate comments to the model and uploads them to the Mart.

Use Case: Transitioning using ER360, Mart, and DM

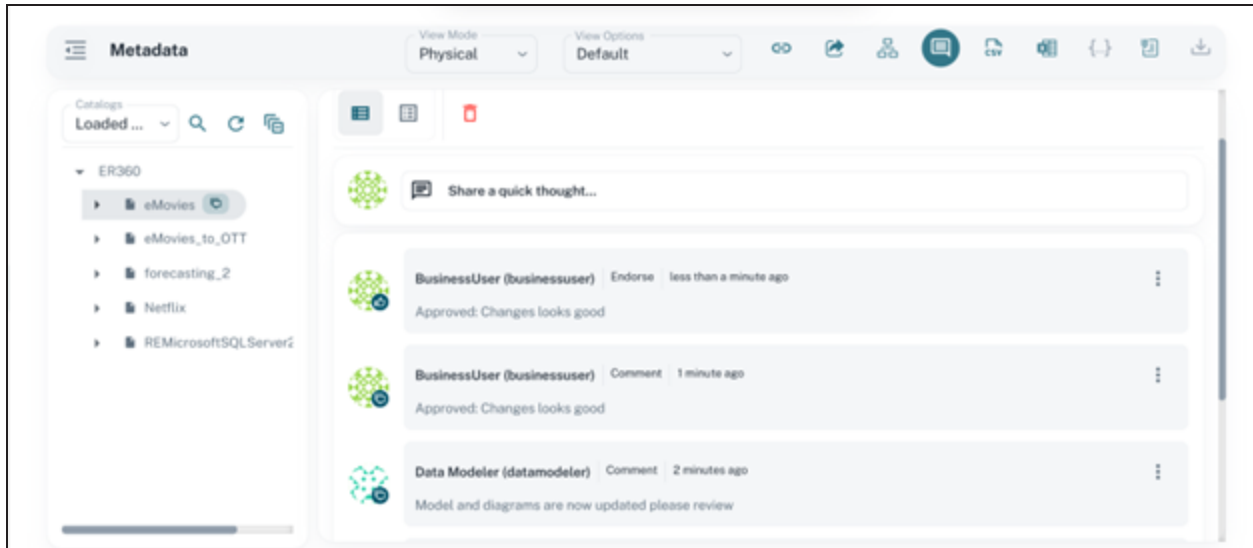


Now the Data Modeler creates a harvest job to update the model in mart. After successful harvest Job, the Data Modeler refreshes the ER360 catalogs.



Now the changes are available in ER360 to review. Data Modeler adds a comment in diagram to notify the users about the update. Business users review and approve the changes by endorsing the Diagram.

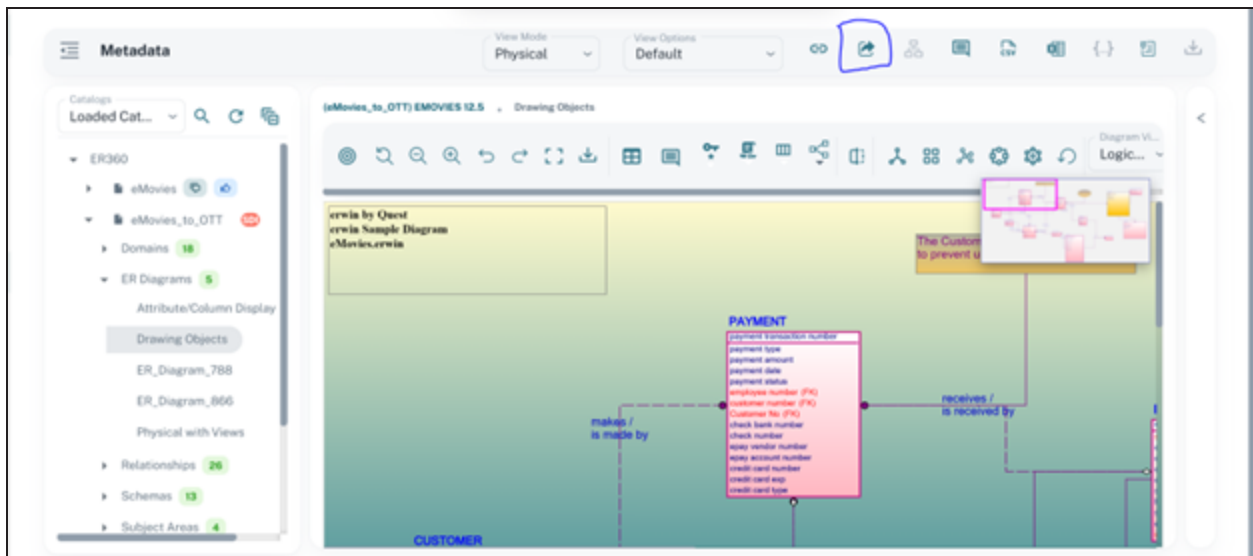
Use Case: Transitioning using ER360, Mart, and DM



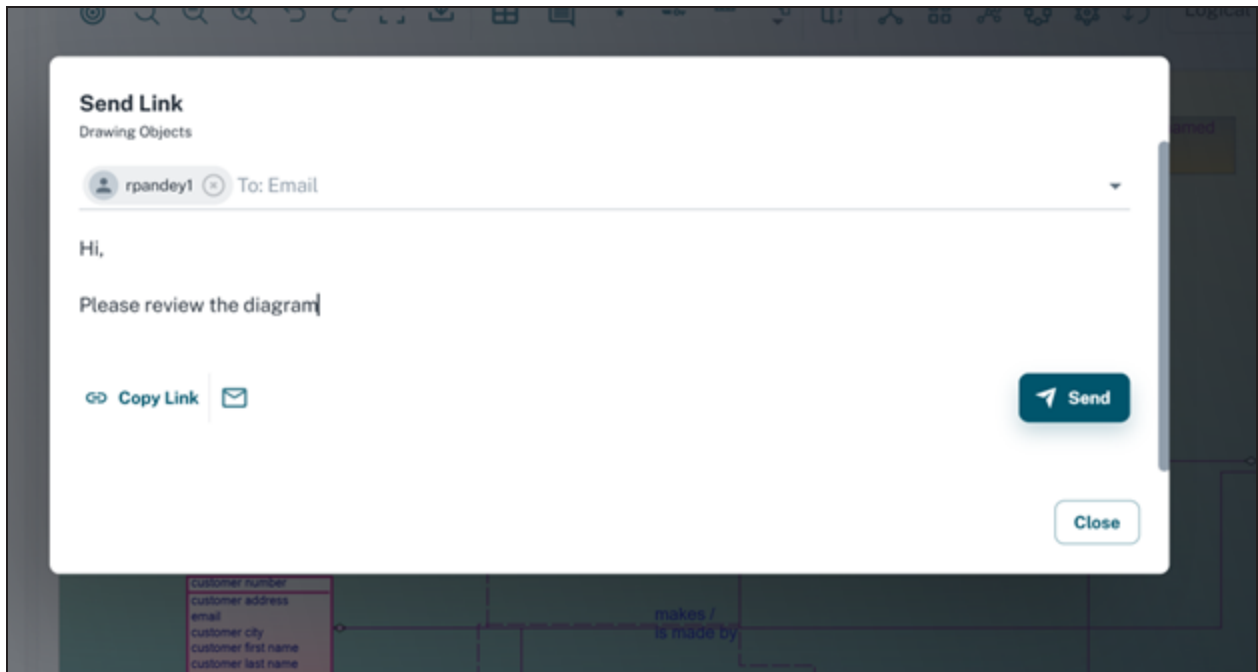
Share and Collaborate:

These diagrams can be shared by the Modelers to the other stakeholders:

- If they have ER360 then you can use the Collaborate button on the top toolbar.
- This will share a link to the diagram with a message of your choice to the user available in the drop down list.



Use Case: Transitioning using ER360, Mart, and DM



Use Case: Managing Legacy Cleanup and PII Governance using Worksheets and Collections

Benefits of Using Worksheets and Collections

- **Worksheets:**
 - Enables flexible exploration of large metadata sets.
 - Useful for immediate analysis of tasks like impact assessment or quality checks .
 - Useful for creating custom reports.
- **Collections:**
 - Offers a persistent grouping of metadata for ongoing projects.
 - Enhances focus on specific metadata subsets, supporting governance and compliance.

Feature	Worksheets	Collections
Purpose	Analyze and manipulate metadata in tabular form.	Group related metadata entities for logical management.
Customization	Allows filtering, sorting, and exporting data.	Provides tagging, grouping, and lineage exploration.
Collaboration	Share tabular views with stakeholders.	Share curated metadata sets for specific use cases.
Example Usage	Impact analysis, metadata reporting.	Compliance management, data governance.

Deprecated Entities - Impacted Objects

Objective: Identify all database tables affected by a schema change in a source system. In this case let us create a Worksheet for Movies. Here we will add all the metadata related to Movies in the model.

Workflow for Business User to Data Modeler in ER360

1. Business Stakeholders decide which legacy entities are no longer relevant in the OTT model (e.g., physical store data, rental records).
2. Business Stakeholders create a Collection in ER360 titled "Legacy Clean-Up Targets".
3. They add deprecated entities to the collection using ER360 Global search or Browse capabilities.
4. Data Modelers then create a Worksheet called "Deprecated Entities - Impacted Objects" to investigate how these deprecated entities affect the model.
5. In the worksheet, Data Modelers:
 - Add the deprecated entities (e.g., Movie Copy, Store, Customer Credit)
 - Add related metadata columns like Relationships, Subject Areas, or Views.
 - Data Modelers can also use Advance filter option which works like SQL to search for more specific information.
 - Data Modelers can also share this worksheet with other users.
6. This worksheet helps them analyze downstream impacts – such as broken relationships, redundant views, or obsolete subject areas.
7. Development Team uses this information to remove, refactor, or update database structures, ETL jobs, or reports that depend on the deprecated entities.
8. Data Governance Team Creates a collection of “DG-PII Items” Personal or sensitive information like names, email addresses, etc.
 - Use Global Search for entities or attributes (like name, email address, Credit Card)
 - Data Governance Team can share this collection with Data Modelers using the share option.
 - Data Governance Team can suggest the PII information using comment feature in ER360 to Data modelers to Mark it as Sensitive or SDI

Use Case: Managing Access to Sensitive Models using Profiles and Permissions

Objective: To restrict access to sensitive data models (e.g., PII-heavy, or contractual metadata) by configuring Profiles and Permissions in erwin ER360. This ensures only authorized users – such as SDI-approved users or governance team members – can view, edit, or comment on critical models during or after the transition from DVD to OTT platforms.

Workflow for Admin Users

1. Create user profiles based on access needs (e.g., full access, read-only, no access).
2. Apply model-level permissions to control who can see or edit sensitive models.
3. Assign users to appropriate profiles based on their role or responsibility.
4. Monitor and audit access using erwin ER360's built-in tools to ensure compliance.

User Profiles and Permissions

Profile	Key Permissions
Admin User	All permissions including Catalog Management, Library, Model, Permission Management, User Management, Settings, Indexing, Harvest, Browse Metadata, Enterprise Architecture, View, Collection, Worksheet
Data Modeler	Model, Worksheet, View, Collection, Indexing, Browse Metadata
Business User	View, Collection, Worksheet, Browse Metadata
Data Governance	Permission Management, User Management, View, Collection, Worksheet, Browse Metadata
Developer	View, Collection, Worksheet, Browse Metadata
Viewer	View only, Browse Metadata

Workflow for Admin Users (Managing Access to Sensitive Models):

1. Identify Sensitive Models:
 - Admin or Governance Team identifies models with the following and mark them SDI in erwin DM:
 - PII
 - Regulatory/compliance metadata
 - Business-critical architecture
2. Create a Restricted Collection
 - Admin creates a Collection (e.g., “Restricted Models”) containing these models.
3. Configure Permissions Based on Profile
 - Using Permission Management, the Admin:
 - Grants edit/view rights to Data Modelers and Governance
 - Grants view-only rights to Developers
 - Restricts or denies access for Business Users and Viewers
4. Assign Users to Profiles
 - Admin uses User Management to assign users to the correct roles.
 - Ensures that restricted content is not exposed to unapproved users.
 - Review Changes
 - Once the changes are saved, make sure to enable the Apply permission with Search under settings.
5. Monitor Access
 - Periodic reviews ensure compliance with governance policies.

Use Case: Managing Enterprise-level Diagrams

With all your harvested models and metadata, ER360 allows you to construct and visualize Enterprise Architecture (EA) diagrams – helping data modelers, architects, and business users understand the relationships and data flows across systems.

This is particularly useful during modernization, mergers, or platform transitions – for example, when moving from a legacy DVD rental business to an OTT streaming platform.

Example: eMovies Transition to OTT Platform

In this example, we track and visualize the evolution of three key systems:

- **DVD Rental System**
Legacy system with tables like CUSTOMERS, MOVIES, and RENTALS.
- **OTT Streaming Platform**
Modern system with USERS, CONTENT, and STREAMING_HISTORY.
- **Enterprise Data Warehouse (EDW)**
Central integration layer with DW_CUSTOMERS, DW_CONTENT, and DW_USAGE_FACT.

To create and view EA diagrams:

1. Go to the Application Menu > EA
The Enterprise Architecture page opens.
2. Select the models you want to connect (e.g., DVD, OTT, EDW).
3. Use drag-and-drop to position models and draw relationships.
4. You can define connections/links such as:
 - DvDRental -> OTT
 - DataWareHouse -> OTT
 - DataWareHouse -> DvDRental

You can also see the Model properties in the right-hand column properties pane:

Use Case: Transitioning from DVD Rental to OTT using JIRA Integration

This case shows how business users and data modelers collaborate to update the data model during the transition from DVD rental to OTT streaming, using ER360 with JIRA integration.

1. Business User Raises a Request
 - A business user suggests adding a new entity called Subscription.
 - The request is added either in JIRA Ticket with a Tag - #MART-TRIGGER.
 - The Model is also associated with the JIRA Ticket.
2. Data Modeler Reviews the Request
 - The data modeler sees the request in JIRA and reviews the status in ER360.
 - They review the suggested changes.
3. Data Modeler Updates the Model
 - The data modeler opens the model in erwin Data Modeler.
 - The Subscription entity is added with relevant fields.
 - The updated model is saved to the Mart.
4. Model is Uploaded to ER360
 - The model is harvested to ER360 using a harvest job.
 - The catalog in ER360 is refreshed to reflect the updated model.
 - The Business user will also receive an email regarding the new entity added in the model.
5. Comments added in ER360
 - The data modeler adds comments in ER360.
 - The same comment is also updated in JIRA Ticket.
 - The business user adds a comment in JIRA Ticket “The New changes look good.”
6. Data Modeler adds certification.
 - The data modeler certifies the model in ER360.
 - Once certified, the linked JIRA ticket is automatically marked as “Done.”
7. Repeat for Future Requests

Use Case: Transitioning from DVD Rental to OTT using JIRA Integration

- Any future changes (like adding Devices or Streaming History) follow the same steps.
- Comments and tickets stay in sync between ER360 and JIRA.