



erwin Data Intelligence

Configuration Guide

Release v14.0



Legal Notices

This Documentation, which includes embedded help systems and electronically distributed materials (hereinafter referred to as the Documentation), is for your informational purposes only and is subject to change or withdrawal by Quest Software, Inc and/or its affiliates at any time. This Documentation is proprietary information of Quest Software, Inc and/or its affiliates and may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of Quest Software, Inc and/or its affiliates

If you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all Quest Software, Inc and/or its affiliates copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to Quest Software, Inc and/or its affiliates that all copies and partial copies of the Documentation have been returned to Quest Software, Inc and/or its affiliates or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, QUEST SOFTWARE, INC. PROVIDES THIS DOCUMENTATION AS IS WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL QUEST SOFTWARE, INC. BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF QUEST SOFTWARE, INC. IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is Quest Software, Inc and/or its affiliates Provided with Restricted Rights. Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2024 Quest Software, Inc. and/or its affiliates All rights reserved. All trade-marks, trade names, service marks, and logos referenced herein belong to their respective companies.

Contact erwin

Understanding your Support

Review [support maintenance programs and offerings](#).

Registering for Support

Access the [erwin support](#) site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for [erwin Data Intelligence \(erwin DI\)](#), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit <http://erwin.com/>.

Provide Feedback

If you have comments or questions, or feedback about erwin product documentation, you can send a message to distechpubs@erwin.com.

News and Events

Visit [News and Events](#) to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

Contents

Configuration	9
Configuring Discover Assets	10
Configuring Mapping Manager	15
Configuring Change Log Settings	16
Configuring User-defined Fields	19
Configuring Version Display	22
Configuring Mapping State Settings	25
Configuring Notifications	28
Configuring Metadata Manager	37
Configuring Table and Column Classes	38
Configuring Notifications on Scanning Metadata	41
Configuring Version Display	43
Configuring Notifications on Profiling Data	45
Configuring Data Profiling and DQ Scores	47
Enforcing Credentials for Data Access or Preview	50
Displaying User Defined Fields	51
Configuring Codeset Manager	52
Configuring Release Manager	54
Configuring Environments for Release Objects	55
Configuring Release Object Types	58
Configuring Release and Release Object Statuses	60
Configuring History Types	63

Configuring Notifications about Release Objects	65
Configuring Test Manager	66
Configuring Requirements Manager	67
Creating Templates	68
Adding Artifacts to Templates	70
Designing Forms	74
Managing Artifacts	80
Managing Templates	82
Configuring Email Settings	83
Configuring Version Display	87
Configuring Business Glossary Manager and Data Marketplace	89
Configuring Asset Types	91
Configuring Asset Details	93
Configuring Catalog Form	96
Configuring Asset Form	102
Adding Asset Types	109
Configuring erwin DM NSM Asset	113
Configuring Associations and Relationships	115
Configuring Data Value Score	120
Other Configurations	123
Edit Property Options	124
Configuring Plugins	125
Setting Miscellaneous Configurations	127

Configuring Email Settings	129
Configuring Sensitivity Update Notifications	135
Configuring Sensitivity Classifications	137
Configuring Data Profiling	140
Enabling DQLabs	141
Accessing erwin Data Quality Configuration Details	143
Scheduling erwin Data Quality Jobs	144
Configuring Scheduled Jobs	147
Configuring Asset Settings	148
Configuring Version Retention	151
Scheduling Clean up Jobs	153
Setting History Retention Period (in months)	156
Configuring Workflow Settings	157
Configuring Language Settings	160
Configuring License Renewal Reminders	163
Configuring Form Validation Settings	165
Configuring Form Fields	167
Associating Forms	169
Managing Forms	171
Data Lineage Settings	173
Configuring HP ALM	175
Configuring Menu Theme	177
Configuring Security Setting	181

Configuring Business Entity Types	182
Configuring IDR Setting	185
Scheduling IDR Jobs	188
Asset Update Options	194
Configuring License	196

Configuration

This section walks you through the settings for each module of erwin Data Intelligence (erwin DI). These settings enable you to configure erwin DI according to your preferences.

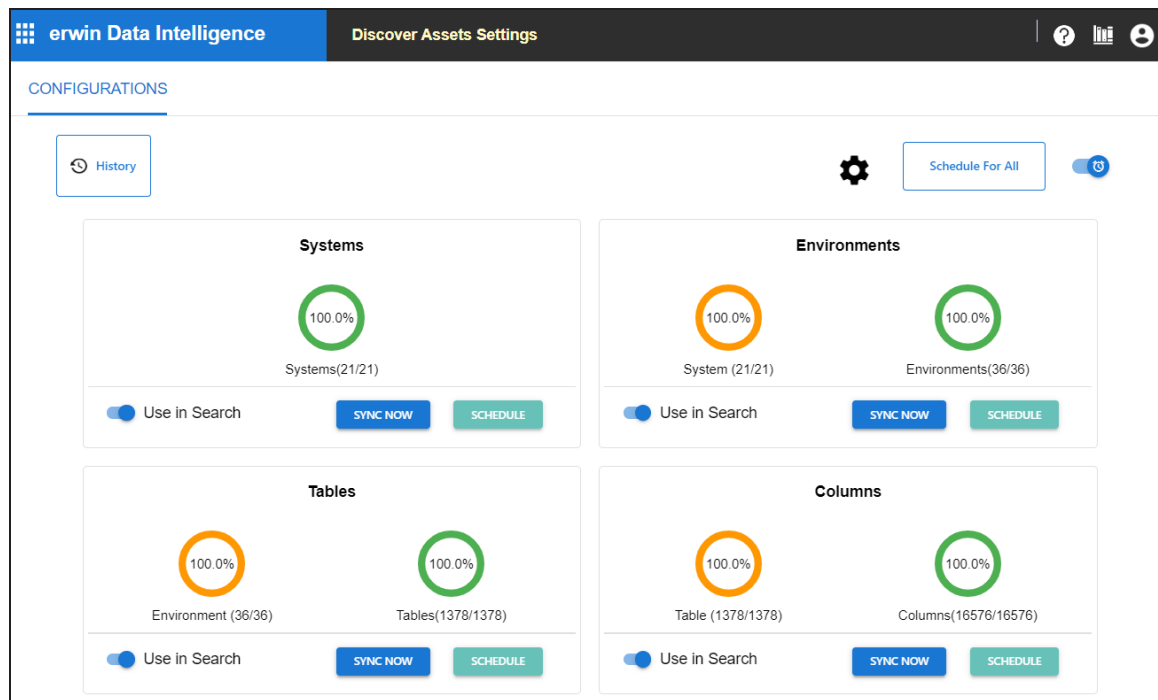
Configuring Discover Assets

On the Discover Assets Settings page, you can configure the Discover Assets module with respect to asset property and value synchronization with respective modules. After synchronization for assets is completed, you can discover and analyze their status. You can also schedule synchronization jobs, control the asset types available in the Discover Assets module, and view activity logs.

To configure the Discover Assets module, follow these steps:

1. Go to **Application Menu > Settings > Discover Assets**.

The Discover Assets Settings page appears.



2. On the configuration page, use the following options:

History (🕒)

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



Use this option to switch **Include Extended Properties** option **ON**. The extended properties that are configured as filters are displayed in the Discover Assets module. You can configure the extended properties as filters for [technical](#) and [business](#) assets.

Schedule For All

Use this option to [schedule a synchronization job](#) for all asset types.



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

3. On the asset type card, use the following options:

Use in Search ()

Use this option to enable asset discovery for an asset type.

Sync Now

Use this option to start synchronization activity immediately for an asset type.

Schedule

Use this option to [schedule synchronization jobs](#) for an asset type. This option is available only when the **Schedule For All** option is disabled.

Scheduling Synchronization Jobs

Apart from scheduling a sync job, you also can manually sync the asset properties and values individually on the asset type card. To sync them manually, on an asset type card, click **Sync Now**. Apart from scheduling synchronization jobs for all assets, you can schedule them for individual asset types.

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

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

The Job Scheduler page appears.

Configuring Discover Assets

Job Scheduler

×

Job Name

Discover Assets Data Syncing

Schedule Job On

12-05-2022 07:44:00



Local

×

Server

Interval

Every Day

▼

☒ Repeat

Hours

☒ Minutes

1

Object Types

Business Terms

×

Business Policies

×

Business Rules

×

DS Agreements

×

Issues

×

Tags

×

DM NSM Files

×

Compliance Reports

×

Reports

×

Systems

×

Environments

×

Tables

×

Columns

×

Mappings

×

Send Email

☒

Email Id

abc@abc.com

CC Email Id(s)

▼

Hit the enter key for multiple email(s)

Update

Delete

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

Field Name	Description
Job Name	Specifies the job name.

Configuring Discover Assets

Field Name	Description
	For example, Systems_1650468274963. This field auto-populates a job name and is uneditable.
Schedule Job On	Specifies the date and time of the job. For example, 03-24-2020 11:45.
Local or Server	Specifies whether the job uses local or server time. • Local: Indicates that job uses date and time on your local machine • Server: Indicates that the job uses the date and time of a machine where your application is deployed
Interval	Specifies the frequency of the job. • Only Once: Indicates that the job runs only once • Every Day: Indicates that the job runs everyday • Every Week: Indicates that the job runs weekly • Every Month: Indicates that the job runs monthly
Repeat	Specifies whether the job repeats every day. This field is available only when Interval is set to Every Day. Additionally, you can set the repeat time based on hours or minutes. For example, 1 hours or 60 minutes
Object Types	Specifies the object types for which the job should be scheduled. This field is available only when you use the Schedule For All option.
Send Email	Specifies whether job notifications are sent to your email ID and the email IDs mentioned in CC Email Id(s) field
Email Id	This field is auto-populated with your email ID. You receive email notifications about the scheduled job from the administrator's email ID.
CC Email Id (s)	Specifies the email IDs that receive job notifications other than you. Enter a comma-separated list of email IDs that should receive email notifications about the scheduled job. For example, ab.dav@xyz.com, cal.kai@xyz.com

3. Click **Submit**.

Configuring Discover Assets

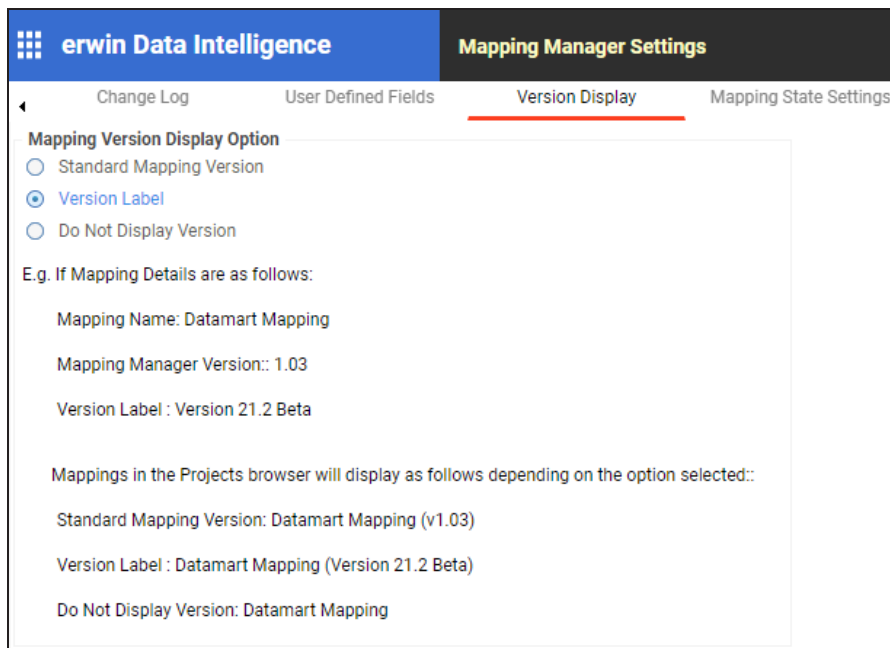
The synchronization job is scheduled.

Configuring Mapping Manager

On the Mapping Manager Settings page, you can set up the Mapping Manager with respect to:

- [Change Log](#): Under this, you can configure change logs.
- [User Defined Fields](#): Under this, you can add more user-defined fields.
- [Version Display](#): Under this, you can configure version display of maps.
- [Mapping State Settings](#): Under this, you can configure mapping states and sub-states.
- [Notifications](#): Under this, you can configure email notifications.

To access Mapping Manager Settings, go to **Application Menu > Settings > Mapping Manager**. The Mapping Manager Settings page appears:



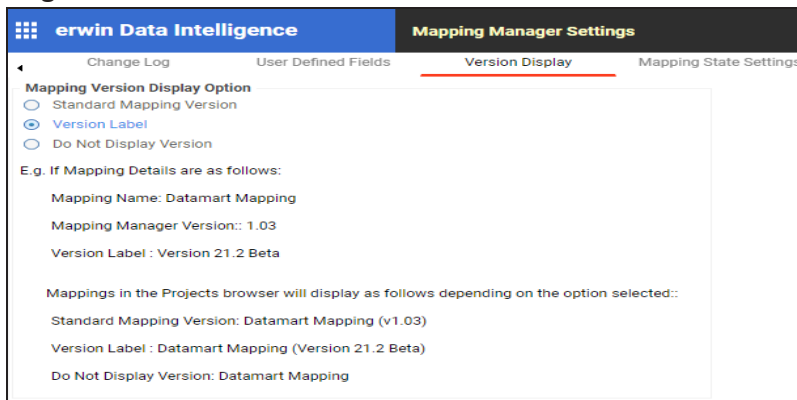
Configuring Change Log Settings

Change logs capture changes made to mapping specifications and additional mapping information. You can enable change logs and display them on the Change Log tab under the Additional Mapping Information pane. You can also export change logs to an MS Excel file at the project, subject, and mapping levels.

To configure change log settings, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.

The Mapping Manager Settings page appears. By default, it opens the Change Log settings.



2. Use the following options:

Enable Change Log Capture for Mapping Specifications

To capture change logs for the Mapping Specification tab, select the check box.

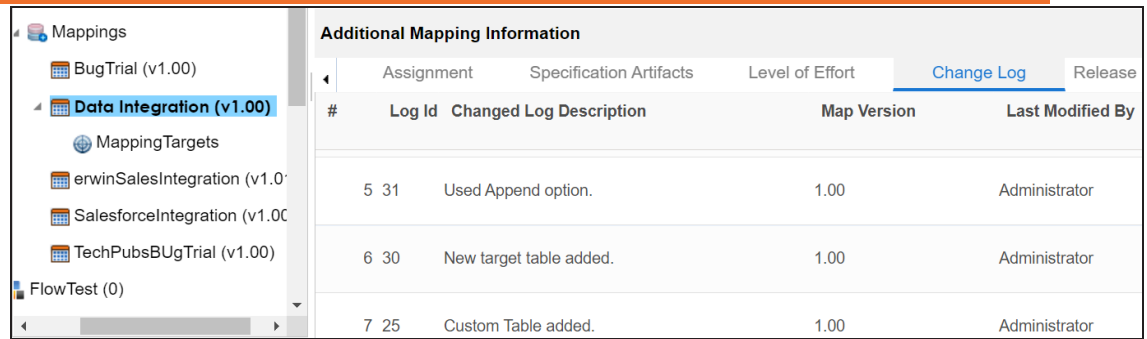
Enable Change Log tab display on Mapping Specification tabs

You can use this check box only when the Enable Change Log Capture for Mapping Specifications check box is selected.

To display the Change Log tab under the Additional Mapping Information pane, select the check box.

The Change Log tab appears under the Additional Mapping Information pane. The pane is available at bottom of the central pane when you click a map in Workspace Mappings.

Configuring Change Log Settings



Additional Mapping Information				
◀ Assignment Specification Artifacts Level of Effort Change Log Release ▶				
#	Log Id	Changed Log Description	Map Version	Last Modified By
5	31	Used Append option.	1.00	Administrator
6	30	New target table added.	1.00	Administrator
7	25	Custom Table added.	1.00	Administrator

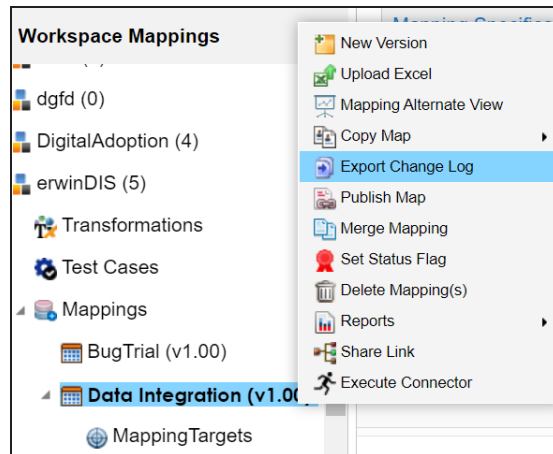
Enable export of Change Logs to MS Excel (at the Project Subject and Mapping Levels)

You can use this check box only when the Enable Change Log Capture for Mapping Specifications check box is selected.

To make Export Change Log option available, select the check box.

Now, you can export change logs to an MS Excel file at project, subject, and mapping level.

For example, the following image displays Export Change Log option at mapping level.



Enable Change Log capture for Mapping Specification tabs

Configuring Change Log Settings

You can capture change logs for tabs under the Additional Mapping Information pane. To capture change logs for tabs under the Additional Mapping Information pane, select the corresponding <Tab_Name> check box.

For example, to record change logs for Map Spec Overview tab under Additional Mapping Information, select the **Map Spec Overview tab** check box.

Configuring User-defined Fields

You can add more fields to the User Defined4 and User Defined5 tabs. These tabs are available under the Additional Mapping Information pane. You can also add more fields under the Subject Details tab.

To configure more fields on User Defined4 and User Defined5 tabs, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click the **User Defined Fields** tab.

The following page appears.

Change Log **User Defined Fields** Version Display

Table Metadata :

☒ User Defined-1	☒ User Defined-6
☒ User Defined-2	☒ User Defined-7
☒ User Defined-3	☒ User Defined-8
☒ User Defined-4	☒ User Defined-9
☒ User Defined-5	☒ User Defined-10

Note: These user defined flex fields are available at the table meta data level and can be used to tag additional meta data elements.

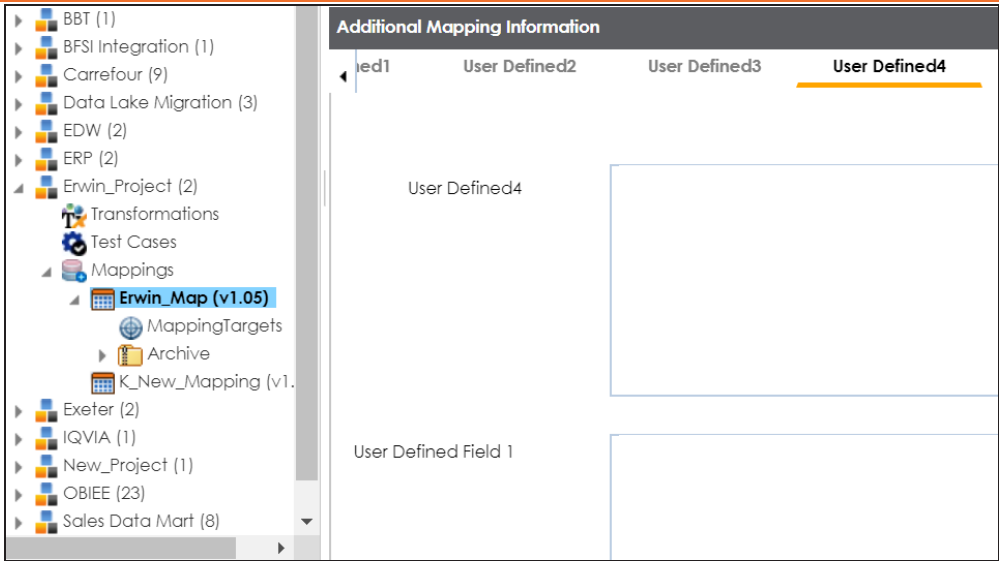
User Defined Tabs :

☒ Additional Fields in User Defined Tabs

3. Under the **User Defined Tabs** section, select the **Additional Fields in User Defined Tabs** check box.

20 additional fields are added to the User Defined4 and User Defined5 tabs.

Configuring User-defined Fields



Use ◀ or ▶ to scroll to the User Defined4 and User Defined5 tabs.

To configure more fields on Subject Details tab, select the **Additional Subject User Defined Fields** check box.

15 additional fields are added under the Subject Details tab.

Configuring User-defined Fields

Mapping Summary

Subject Details

Extended Properties

Subject Name*

P_Name

Subject Description

This subject area contains mapping for the Sales data integration project. Subjects are organised based on the logical organisation.

Created By

Administrator

Created Date Time

2019-10-30 11:44:51.983

Modified By

Administrator

Modified Date Time

2020-04-06 19:24:35.547

Additional Fields

User Field 1

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

You can set UI labels of user defined fields under the Language Settings. For more information, refer to the [Language Settings](#) topic.

Configuring Version Display

You can display map version in two ways:

1. **Standard Mapping Version:** This option displays the version of the map in a standard form.

For example, Erwin_Map (v.1.00), where Erwin_Map is the Map Name and 1.00 is the Map Version.

2. **Version Label:** This option displays the version of the map using a version label.

For example, Erwin_Map (Data_Migration), where Erwin_Map is the Map Name and Data_Migration is the Version Label.

Version Label is specified while creating maps. You can also provide Version Label by [editing the Map Spec Overview tab](#).

To configure version display of maps, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click the **Version Display** tab.

The following page appears.

Configuring Version Display

Change Log User Defined Fields **Version Display** Mapping St

Mapping Version Display Option

☒ Standard Mapping Version

☐ Version Label

☐ Do Not Display Version

E.g. If Mapping Details are as follows:

Mapping Name: Datamart Mapping

Mapping Manager Version:: 1.03

Version Label : Version 21.2 Beta

Mappings in the Projects browser will display as follows depending on the option selected::

Standard Mapping Version: Datamart Mapping (v1.03)

Version Label : Datamart Mapping (Version 21.2 Beta)

Do Not Display Version: Datamart Mapping

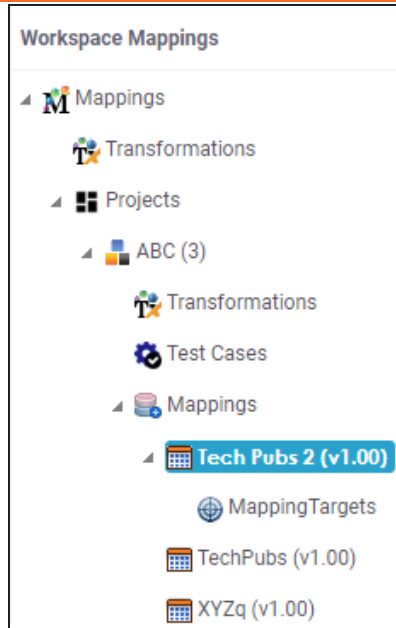
3. Use the following options:

Standard Mapping Version

To display the version of maps in standard mapping version, click **Standard Mapping Version**.

For example, the following image displays the map version in the standard mapping version form.

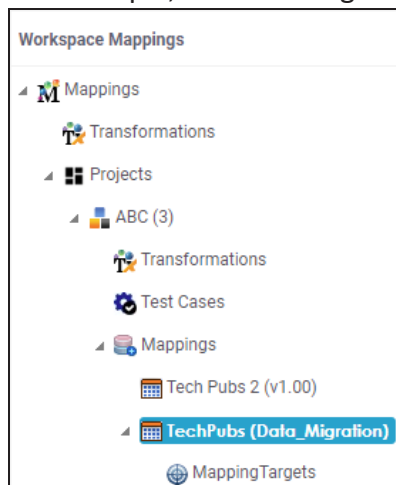
Configuring Version Display



Version Label

To display the version of maps using version label, click **Version Label**.

For example, the following image displays the map version with a version label.



Do Not Display Version

To display maps without version, click **Do Not Display Version**.

Configuring Mapping State Settings

By default, there are two mapping states, In Progress and Approved. You can configure new mapping states and sub-states for mapping specifications. Use these mappings states and sub-states to [update a mapping specification](#) in the Mapping Manager.

To configure mapping states, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click the **Mapping State Settings** tab.

The following page appears.

Change Log User Defined Fields Version Display Mapping State Settings					
State					
#	State Name	Created By	Created Date Time	Last Modified By	Last Modified
1	In Progress	SYSTEM	2020-02-26 03:48:31.	SYSTEM	2020-02-26 03:4
2	Approved	SYSTEM	2020-02-26 03:48:31.	SYSTEM	2020-02-26 03:4

3. Click .

The New State page appears.

New State



State Name*

4. Enter **State Name** and click .

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

Configuring Mapping State Settings

Change Log User Defined Fields Version Display <u>Mapping State Settings</u> Notifications End To End L							
State 							
#	State Name	Created By	Created Date Time	Last Modified By	Last Modified Time	Edit	Delete
1	In Progress	SYSTEM	2020-02-26 03:48:31.	SYSTEM	2020-02-26 03:48:31.		
2	Approved	SYSTEM	2020-02-26 03:48:31.	SYSTEM	2020-02-26 03:48:31.		
3	Approval Pending	Administrator	2020-12-04 13:12:41.	Administrator	2020-12-04 13:12:41.		

Use the following options:

Edit ()

You can update State Name.

Delete ()

You can delete a mapping state that is no longer required.

To configure sub-states, follow these steps:

1. Under the **Sub State section**, click .

The New Sub State page appears.

New Sub State



Sub State Name*

2. Enter **Sub State Name** and click .

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

Configuring Mapping State Settings

Sub State 							
#	State Name	Created By	Created Date Time	Last Modified By	Last Modified Time	Edit	Delete
1	First Approval	Administrator	2020-12-04 13:16:19.	Administrator	2020-12-04 13:16:19.		

Use the following options:

Edit ()

You can update Sub State Name.

Delete ()

You can delete a mapping sub-state that is no longer required.

Configuring Notifications

An administrator can configure email notifications, which are sent to users on the following occasions:

- Creating new users
- Assigning maps to users
- Forgetting user credentials
- Creating new maps
- Updating mapping specifications
- Creating versions of maps
- Merging maps
- Copying and pasting maps
- Uploading mapping specification in XML
- Base-lining projects

Email notifications are sent from the administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

To configure notifications, follow these steps:

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

The following page appears.

Configuring Notifications

Change Log	User Defined Fields	Version Display	Mapping State Settings	Notifications	End To End Lineage
Mapping Manager					
New User Creation:					
Email Subject	Mapping Manager User Successfully Added - DO NOT REPLY		Email Body	Hello @UserFullName@, User @UserId@ has been successfully added with password @Password@. This user has been granted the role of @Role@. The default role for this user is @DefaultRole@. <i>Note: This is an auto generated email. It is monitored. Please do not reply to this email.</i>	
Mapping Assignments:					
Email Subject	Mapping Manager Assignment Status - DO NOT REPLY		Email Body	Hello, This is a system generated notice to inform you of a new Mapping Assignment. Mapping Details: Project Name: @projectName@ Mapping Name: @mapName@ Assignment Status Details:	

3. Click .

4. Work on the following options:

New User Creation

Use this section to configure the email notification sent to a new user that you create in the Resource Manager.

Configure the following settings:

Email Subject: You cannot use a custom subject as the default subject cannot be edited.

Email Body: You can edit the default body content and use custom body content.

For more information on creating users, refer to the [Creating Users and Assigning Roles](#) topic.

Mapping Assignment

Use this section to configure email notifications to project users on assigning a map to users, or changing status of a map.

Use the following options:

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

Email Body: You can edit the default body content, and use custom body content.

Configuring Notifications

For more information on mapping assignment, refer to the [Assigning Mapping Specifications to Users](#) topic.

Forgot Password

Use this section to configure email notifications to users who forgot their User-name (User ID) or Password.

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

Send Mail On

New Mapping: Use this section to send email notifications and comments to project users when you create a new map under a project.

Version Display Mapping State Settings **Notifications**

Send Mail On

New Mapping:

☒ Email

☒ Comments

Email Subject

New Mapping Details - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

NEW MAPPING(s) HAS BEEN CREATED.

Project Name :@targetProjectName@
Subject Name: @targetSubjectName@
Mapping Name(s):@targetMappingName@
Mapping Id(s): @targetMappingId@
Mapping Version:@targetMappingVersion@
Created By: @targetMappingCreatedBy@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while creating a map, select the **Comments** check box.

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

Configuring Notifications

Email Body: You can edit the default body content and use custom body content.

For more information on creating maps, refer to the [Creating Maps](#) topic.

Save Mapping: Use this section to send email notifications and comments to project users on updating a mapping specification grid.

The screenshot shows a web-based configuration interface with three tabs: 'Version Display', 'Mapping State Settings', and 'Notifications'. The 'Notifications' tab is active. It contains the following sections:

- Save Mapping:** Two checkboxes, 'Email' and 'Comments', both of which are currently unchecked.
- Email Subject:** A text field containing the default subject: 'Save Mapping Details - DO NOT REPLY'.
- Email Body:** A text area containing the default email body text:
Hi,

This is a system generated email notification.

A MAPPING HAS BEEN SAVED.

Below the text is a table with three rows and two columns:

Project Name:	@targetProjectName@
Subject Name:	@targetSubjectName@
Mapping Name:	@targetMappingName@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

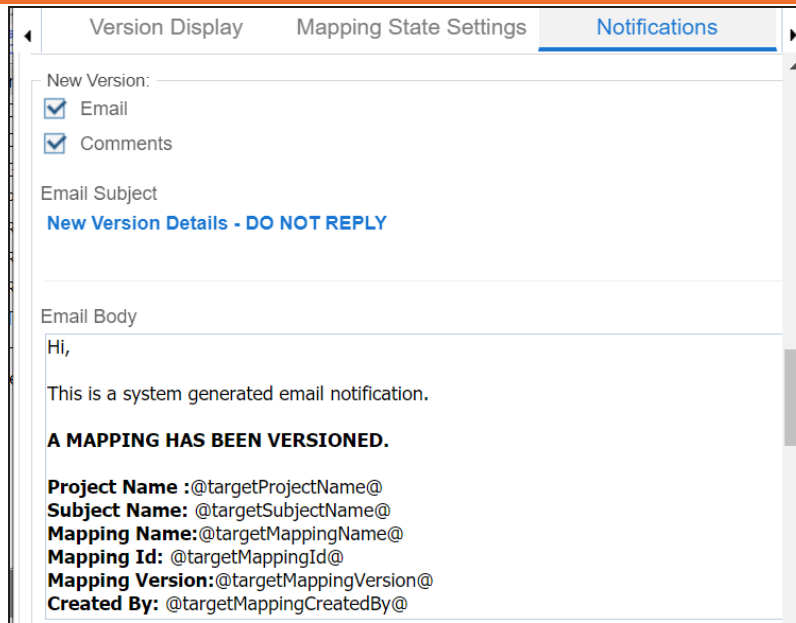
Comments: You can use this check box only when the Email check box is selected. To include comments entered under the Mapping Spec Row Comments column, select the **Comments** check box.

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

Email Body: You can edit the default body content and use custom body content.

New Version: Use this section to send email notifications and comments to project users on creating a new version of a map under a project.

Configuring Notifications



The screenshot shows a configuration window with three tabs: 'Version Display', 'Mapping State Settings', and 'Notifications'. The 'Notifications' tab is active. It contains the following fields:

- New Version:** A section with two checked checkboxes: ☒ Email and ☒ Comments.
- Email Subject:** A text field containing the default subject: **New Version Details - DO NOT REPLY**.
- Email Body:** A text area containing the default body text:
Hi,

This is a system generated email notification.

A MAPPING HAS BEEN VERSIONED.

Project Name :@targetProjectName@
Subject Name: @targetSubjectName@
Mapping Name:@targetMappingName@
Mapping Id: @targetMappingId@
Mapping Version:@targetMappingVersion@
Created By: @targetMappingCreatedBy@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while creating a new version of a map, select the **Comments** check box.

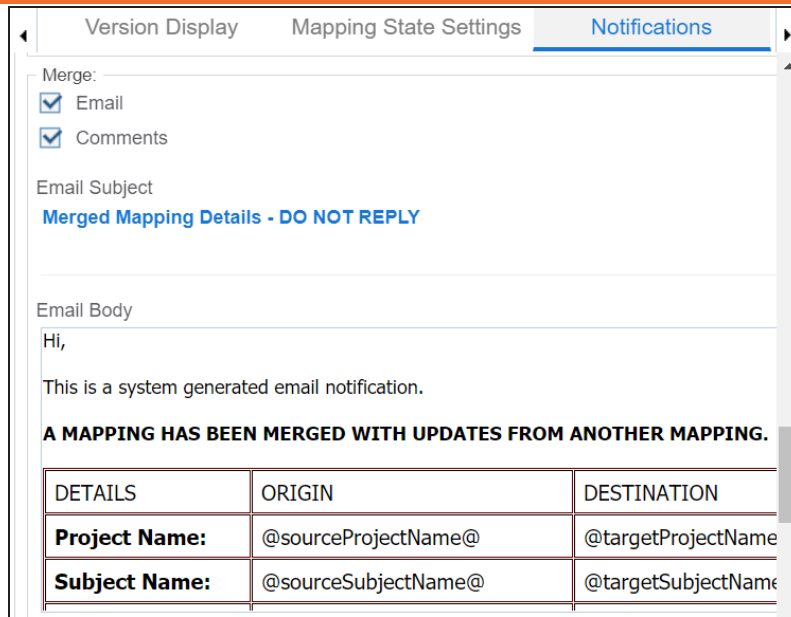
Email Subject: You can edit the default email subject and use a custom email subject.

Email Body: You can edit the default body content and use custom body content.

For more information on creating versions of maps, refer to the [Creating Versions of Maps](#) topic.

Merge: Use this section to send email notification and comments to project users on merging a map with a parent map under a project.

Configuring Notifications



Version Display Mapping State Settings **Notifications**

Merge:

☒ Email

☒ Comments

Email Subject

Merged Mapping Details - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

A MAPPING HAS BEEN MERGED WITH UPDATES FROM ANOTHER MAPPING.

DETAILS	ORIGIN	DESTINATION
Project Name:	@sourceProjectName@	@targetProjectName@
Subject Name:	@sourceSubjectName@	@targetSubjectName@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while merging a map, select the **Comments** check box.

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

Email Body: You can edit the default body content and use custom body content.

For more information on branching and merging a map, refer to the [Branching and Merging Mappings](#) section.

Copy/Paste : Use this section to send email notification and comments to project users on creating a copy of a map under a project.

Configuring Notifications

Version Display Mapping State Settings **Notifications**

Copy/Paste:

☒ Email

☒ Comments

Email Subject

Copied Mapping Details - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

A MAPPING HAS BEEN CREATED/UPDATED USING THE COPY/PASTE FUNCTION

DETAILS	ORIGIN	DESTINATION
Project Name:	@sourceProjectName@	@targetProjectName@
Subject Name:	@sourceSubjectName@	@targetSubjectName@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while pasting a map, select the **Comments** check box.

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

Email Body: You can edit the default body content and use custom body content.

For more information on copying and pasting a map, refer to the [Branching Mappings](#) topic.

Upload XML : Use this section to send email notifications and comments to project users on uploading map in XML. To send comments entered while uploading an XML map, select the **Comments** check box.

Configuring Notifications

The screenshot shows a configuration window with three tabs: 'Version Display', 'Mapping State Settings', and 'Notifications'. The 'Notifications' tab is active. It contains the following elements:

- Upload XML:** A section with two checked checkboxes: ☒ Email and ☒ Comments.
- Email Subject:** A text field containing the value 'XML Mapping Details - DO NOT REPLY'.
- Email Body:** A text area containing the following text:
Hi,

This is a system generated email notification.

A MAPPING HAS BEEN CREATED USING THE XML UPLOAD FUNCTIONALITY.

Project Name :@targetProjectName@
Subject Name: @targetSubjectName@
Mapping Name:@targetMappingName@
Mapping Id: @targetMappingId@
Mapping Version:@targetMappingVersion@
Created By: @targetMappingCreatedBy@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while uploading a map in XML, select the **Comments** check box.

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

Email Body: You can edit the default body content and use custom body content.

For more information on uploading a map in XML, refer to the [Uploading Mapping Specifications in XML](#) topic.

Baseline : Use this section to send email notifications and comments to project users on base-lining a project.

Configuring Notifications

Baseline:

☒ Email

☒ Comments

Email Subject

Project Baseline Details - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

A NEW PROJECT BASELINE HAS BEEN INITIATED.

Project Name :@targetProjectName@

Baseline Version: @targetBaselineVersion@

Project Created By: @projectCreatedBy@

Project Created On:@projectCreatedDate@

Project Baselined By:@projectBaselinedBy@

Project Baselined On: @projectBaselinedOn@

Use the following options:

Email: To turn on email notifications, select the **Email** check box.

Comments: You can use this check box only when the Email check box is selected. To include comments entered while base-lining a project, select the **Comments** check box.

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

Email Body: You can edit the default body content and use custom body content.

For more information on base-lining a project, refer to the [Base-lining Projects](#) topic.

Configuring Metadata Manager

On the Metadata Manager Settings page, you can set up the Metadata Manager with respect to:

- [Table and column class](#): Under this, you can configure table and column classes.
- [Notification](#): Under this, you can configure email notifications about the metadata scan jobs.
- [Version display](#): Under this, you can configure version display of environments.
- [Data Quality Notification](#) and [Settings](#): Under this, you can configure email notifications about the data profiling job and set data profiling parameters.
- [Data access/preview settings](#): Under this, you can enforce credentials for data access/-preview.

To access Metadata Manager Settings, go to **Application Menu > Settings > Metadata Manager**.

The Metadata Manager Settings page appears:

erwin Data Intelligence								
Metadata Manager Settings								
Table & Column Class Notification Version Display Data Quality Data Access/Preview Settings								
Table Class								
#	Table Class	Table Class Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Table_Class	This is a user-defined	Administrator	07-12-2020 05:42:41	Administrator	07-12-2020 05:43:55		
Column Class								
#	Column Class		Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Column_Class		Administrator	07-12-2020 05:47:21	Administrator	07-12-2020 05:47:21		



You can set up the Metadata Manager with respect to [user defined fields](#) on the Mapping Manager Settings page.

Configuring Table and Column Classes

Table and column properties include the table and column classes. You can configure your own table and column classes depending on your requirements.

To configure table classes, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.

The Metadata Manager Settings page appears and by default the Table & Column Class tab opens.

erwin Data Intelligence

Metadata Manager Settings

?

Table & Column Class

Notification

Version Display

Data Quality

Data Access/Preview Settings

Table Class

#	Table Class	Table Class Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Table_Class	This is a user-defined	Administrator	07-12-2020 05:42:41	Administrator	07-12-2020 05:43:55		

Column Class

#	Column Class	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Column_Class	Administrator	07-12-2020 05:47:21	Administrator	07-12-2020 05:47:21		

2. Under the **Table Class** section, click

The Add Table Class page appears.

Add Table Class

Name*

Description

Note*: This change is permanent and applied across existing records.

Configuring Table and Column Classes

3. Enter the Name and Description of the table class.
4. Click .

The table class is created and saved in the Table Class grid.

Table & Column Class				
Table Class				
#	Table Class	Table Class Description	Created By	Created Date Time
1	Table_Class	This is a user-defined	Administrator	2020-12-07 05:42:41.1

5. Use the following options:

Edit ()

To edit the table class, click .

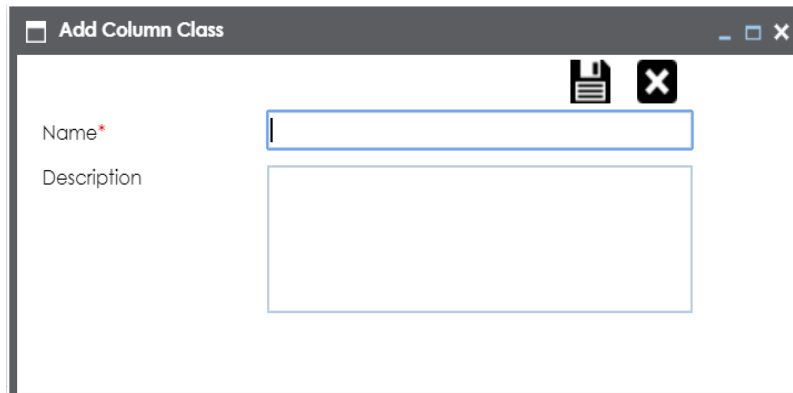
Delete ()

To delete the table class, click .

To configure column classes, follow these steps:

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

The Add Column Class page appears.



The image shows a web form titled "Add Column Class". It has two input fields: "Name*" and "Description". The "Name*" field is a single-line text box, and the "Description" field is a multi-line text area. In the top right corner of the form, there are two icons: a save icon (floppy disk) and a delete icon (X).

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

Configuring Table and Column Classes

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

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

4. Use the following options:

Edit ()

To edit the column class, click .

Delete ()

To delete the column class, click .

You can update table and column properties in the Metadata Manager using the table and column classes.

For more information on updating table properties, refer to the [Updating Table Properties](#) topic.

For more information on column properties, refer to the [Updating Column Properties](#) topic.

Configuring Notifications on Scanning Metadata

You can configure email notifications to users when they schedule metadata scan. The users receive email notifications from the [Admin Email Id](#) when you enable email notifications.

To configure notifications, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click the **Notification** tab.

The following page appears.

Table & Column Class **Notification** Version Display

Scan MetaData

☒ Email

Email Subject
Metadata Scan Job Execution Status - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

@executionMessage@

Job Details	
Job Name :	@jobName@
Job Owner :	@jobOwner@
System Name :	@systemName@

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

Email

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

Email Subject

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

Configuring Notifications on Scanning Metadata

Email Body

You can edit the default body content and use custom body content.

5. Click .

The email notification is configured.

For more information on scheduling a metadata scan, refer to the [Scheduling Metadata Scans](#) topic.

Configuring Version Display

You can display the environment version in two ways:

1. **Standard Environment Version:** This option displays the version of the environment in a standard form.

For example, Data_Migration (v.1.00), where Data_Migration is the environment name and 1.00 is the environment version.

2. **Version Label:** This option displays the version of the environment using a version label.

For example, Data_Migration (erwin_Metadata), where Data_Migration is the environment name and erwin_Metadata is the version label.

Version Label is specified while creating environments. You can also provide version label by editing environments. For more information on using version label, refer to the [Creating Environments](#).

To configure version display of environments, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click **Version Display**.

The following page appears.

Configuring Version Display

The screenshot shows a configuration window with three tabs: 'Table & Column Class', 'Notification', and 'Version Display'. The 'Version Display' tab is active. It contains a section titled 'Environment Version Display Option' with three radio button options: 'Standard Environment Version' (selected), 'Version Label', and 'Do Not Display Version'. Below this, an example is provided: 'E.g. If Environment Details are as follows:'. The example lists 'Environment Name: Datamart Environment', 'Metadata Manager Version: 1.03', and 'Version Label: Version 21.2 Beta'. It then states 'Environments in the Projects browser will display as follows depending on the option selected:' and shows three resulting display formats: 'Standard Environment Version: Datamart Environment (v1.03)', 'Version Label: Datamart Environment (Version 21.2 Beta)', and 'Do Not Display Version: Datamart Environment'.

Table & Column Class Notification **Version Display**

Environment Version Display Option

- ☒ Standard Environment Version
- ☐ Version Label
- ☐ Do Not Display Version

E.g. If Environment Details are as follows:

Environment Name: Datamart Environment

Metadata Manager Version: 1.03

Version Label: Version 21.2 Beta

Environments in the Projects browser will display as follows depending on the option selected:

Standard Environment Version: Datamart Environment (v1.03)

Version Label: Datamart Environment (Version 21.2 Beta)

Do Not Display Version: Datamart Environment

3. Use the following options:

Standard Environment Version

To display the version of environments in the standard environment version, select **Standard Environment Version**.

Version Label

To display the version of environments using version label, select **Version Label**.

Do Not Display Version

To display environments without version, select **Do Not Display Version**.

Configuring Notifications on Profiling Data

You can schedule data profiling job and assess the data quality in the Metadata Manager. You can also configure email notifications to notify users about the data profiling jobs. The users receive email notifications from the administrator's email ID, configured in the [Email Settings](#).

To configure email notifications on profiling data, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click the **Data Quality** tab and then click the **Notification** tab.

The following page appears.

The screenshot shows the 'Data Quality' tab in the Metadata Manager. The 'Notification' sub-tab is selected. Under the 'Data Quality' section, the 'Email' checkbox is checked. The 'Email Subject' field contains the text 'Data Profile Assessment Job Details @jobname@/@systemname@/@envname@/@tablename@'. The 'Email Body' field contains a greeting 'Hi,' followed by a large bold heading 'Data Profile Assessment Job De'. Below this, a list of job details is provided: 'System Name : @systemname@', 'Environment Name : @envname@', 'Table Name : @tablename@', 'Job Owner : @jobOwner@', 'Job Start Date Time : @jobStartedDateTime@', 'Job Completion Date Time : @jobExecutedDateTime@', and 'Total Duration : @jobExecutedDuration@'.

3. Click **Edit**.
4. Use the following options in the Data Quality section:

Email

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

Email Subject

Configuring Notifications on Profiling Data

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

Email Body

You can edit the default body content and use custom body content.

5. Click **Save**.

The email notification is configured.

For more information on scheduling data profile job, refer to the [Profiling Data at Table Level](#) topic.

Configuring Data Profiling and DQ Scores

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

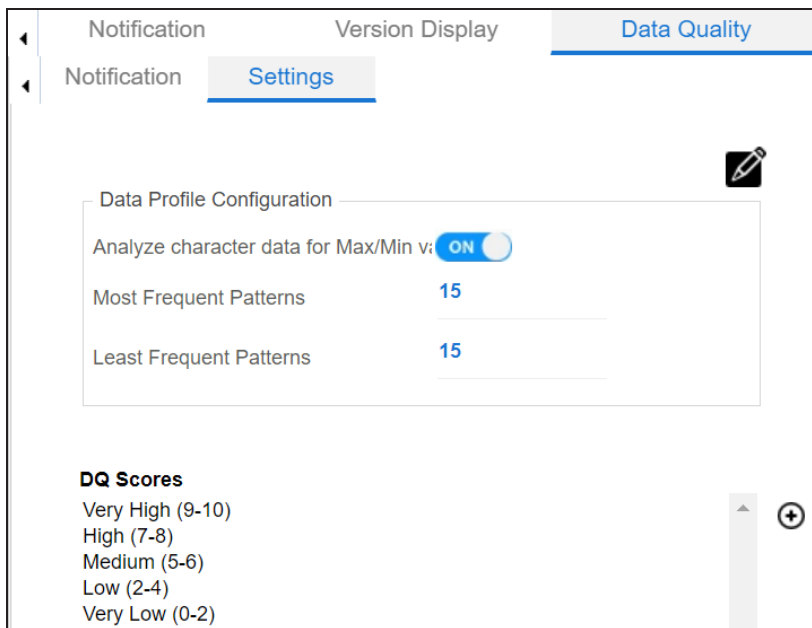
Configuring data profiling parameters involves specifying:

- Whether data profiling requires to analyze character data for maximum and minimum
- Most frequent patterns
- Least frequent patterns

To configure data profiling parameters, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click the **Data Quality** tab and then, click the **Settings** tab.

The following page appears.



3. Click .
4. Use the following options:
Analyze character data for Max/Min

Configuring Data Profiling and DQ Scores

This option specifies whether the data profiling requires to analyze character data for maximum and minimum. Turn the **Analyze character data for Max/Min** to **ON** to analyze character data for maximum or minimum.

Most Frequent Patterns

This option specifies the number of top most frequent patterns to be displayed in the Data Profiling Pattern Summary report. To set the number of top most frequent patterns for display, type the number in the **Most Frequent Patterns** box. For example, if you type the number 3 in the box, then top three most frequent patterns would be displayed in the report.

Least Frequent Patterns

This option specifies the number of bottom least frequent patterns to be displayed in the Data Profiling Pattern Summary report. To set the number of bottom least frequent patterns for display, type the number in the **Least Frequent Patterns** box.

For example, if you type the number 3 in the box, then bottom three least frequent patterns would be displayed in the report.

To configure DQ score option, follow these steps:

1. Under the **DQ Scores** section, click .

The DQ Score Options page appears.

Configuring Data Profiling and DQ Scores

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

2. Click .

A new row is added in the DQ Score Options grid.

3. Double-click the cell under the **Key** column to enter the key.
4. Double-click the cell under the **Value** column to enter the value.



Turn **Publish** to **OFF** to remove the DQ score option from the DQ Scores list.

5. Click .

The DQ Score option is added to the DQ Scores list.

You can schedule data profiling job and assess the data quality in the Metadata Manager. For more information on profiling data, refer to the [Profiling Data at Table Level](#) topic.

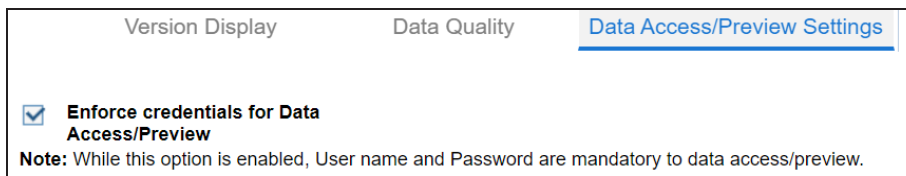
Enforcing Credentials for Data Access or Preview

You can enforce user credentials for previewing or accessing data from the database in the Metadata Manager.

To enforce user credentials to preview data from databases, follow these steps:

1. Go to **Application Menu > Settings > Metadata Manager**.
2. Click the **Data Access/Preview Settings** tab.

The following page appears.



Version Display Data Quality Data Access/Preview Settings ▶

☒ **Enforce credentials for Data Access/Preview**

Note: While this option is enabled, User name and Password are mandatory to data access/preview.

3. Select the **Enforce credentials for Data Access/Preview** check box to enforce user credentials for accessing or previewing the data.

For more information on previewing the data, refer to the [Previewing Data](#) topic.

Displaying User Defined Fields

You can display user defined fields in the Table Properties tab and Column Properties tab.

To display user defined fields, follow these steps:

1. Go to **Application Menu > Settings > Mapping Manager**.
2. Click **User Defined Fields**.

The following page appears.

Change Log	User Defined Fields	Version Display	Mapping State Settings	Notifications	En
Table Metadata :		Columns Metadata :			
☒ User Defined-1	☒ User Defined-6	☒ User Defined-1	☒ User Defined-6		
☒ User Defined-2	☒ User Defined-7	☒ User Defined-2	☒ User Defined-7		
☒ User Defined-3	☒ User Defined-8	☒ User Defined-3	☒ User Defined-8		
☒ User Defined-4	☒ User Defined-9	☒ User Defined-4	☒ User Defined-9		
☒ User Defined-5	☒ User Defined-10	☒ User Defined-5	☒ User Defined-10		
Note: These user defined flex fields are available at the table meta data level and can be used to tag additional meta data elements.		Note: These user defined flex fields are available at the column meta data level and can be used to tag additional meta data elements.			
User Defined Tabs :		Subject User Defined Fields :			
☒ Additional Fields in User Defined Tabs		☒ Additional Subject User Defined Fields			

3. Use the following options:

Table Metadata

To display a user defined field in the **Table Properties** tab, select the corresponding check box. For example, select **User Defined1** check box to display the User Defined1 field in the Table Properties tab.

Columns Metadata

To display a user defined field in the **Column Properties** tab, select the corresponding check box. For example, select the **User Defined1** check box to display the User Defined1 field in the Column Properties tab.

Configuring Codeset Manager

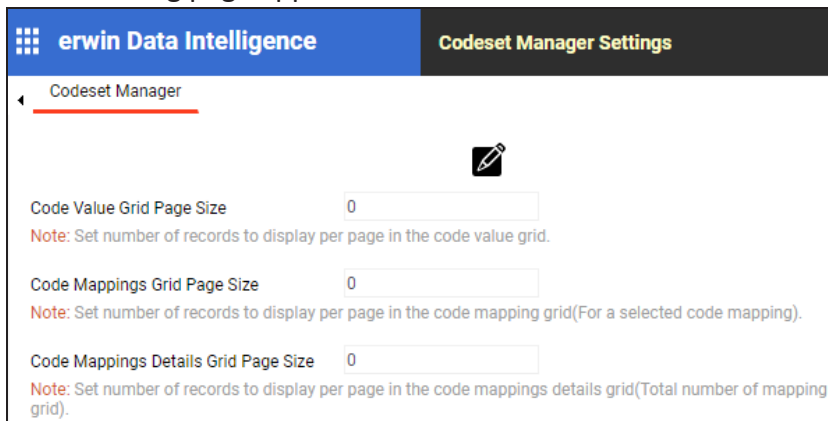
You can configure number of records per page in the Codeset Manager for:

- Code value grid
- Code mappings grid
- Code mappings details grid

To configure number of records per page in the Codeset Manager, follow these steps:

1. Go to **Application Menu > Settings > Codeset Manager**.

The following page appears.

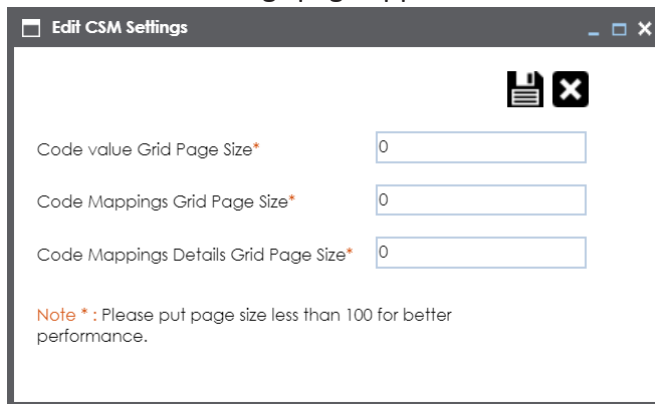


The screenshot shows the 'Codeset Manager Settings' page within the 'erwin Data Intelligence' application. The page has a dark header with the application name and a 'Codeset Manager Settings' tab. Below the header, there's a 'Codeset Manager' section with a pencil icon. It contains three settings, each with a text input field set to '0':

- Code Value Grid Page Size**:
Note: Set number of records to display per page in the code value grid.
- Code Mappings Grid Page Size**:
Note: Set number of records to display per page in the code mapping grid(For a selected code mapping).
- Code Mappings Details Grid Page Size**:
Note: Set number of records to display per page in the code mappings details grid(Total number of mapping grid).

2. Click .

The Edit CSM Settings page appears.



The screenshot shows the 'Edit CSM Settings' dialog box. It has a title bar with 'Edit CSM Settings' and standard window controls. Inside, there's a pencil icon and three settings, each with a text input field set to '0':

- Code value Grid Page Size***:
- Code Mappings Grid Page Size***:
- Code Mappings Details Grid Page Size***:

Note *: Please put page size less than 100 for better performance.

3. Use the following options:

Code value Grid Page Size

Set the number of records to display per page in the code value grid.

Code Mappings Grid Page Size

Set the number of records to display per page in the code mapping grid.



This is for the selected code mappings.

Code Mappings Details Grid Page Size

Set the number of records to display per page in the code mappings details grid.

Save ()

To save the page sizes, click .

Configuring Release Manager

The Release Manager Settings page enables to set up Release Manager with respect to:

- [Release object types](#): Under this, you can add a new release object type under the Miscellaneous Objects.
- [Environments for release objects](#): Under this, you can configure environments for release objects.
- [Release and release object statuses](#): Under this, you can maintain list of release and release object statuses.
- [History types](#): Under this, you can configure history types in a History Listing Grid that can be used for activity logs in the Release Manager.
- [Notifications about release objects](#): Under this, you can configure email notifications to a team member about a release object.

To access Release Manager Settings, go to **Application Menu > Settings > Release Manager**.

The Release Manager Settings page appears:

erwin Data Intelligence

Release Manager Settings

?

Environments

Release Object Types

Release Status

History Types

Notifications

Mapping

Environments Listing

#	Name	Description	Environment Color	Options
1	DEV			
2	TEST			
3	PROD			
4	Staging	This is the staging environment for Mapping object		

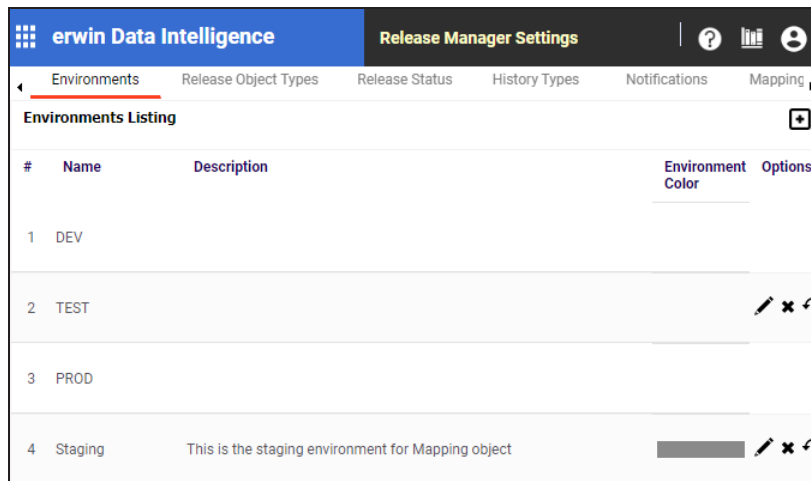
Configuring Environments for Release Objects

You can configure environments for release objects in the Release Manager. DEV and PROD are the two default environments available which cannot be edited or deleted.

To configure environments for release objects, follow these steps:

1. Go to **Application Menu > Settings > Release Manager**.

The following page appears.



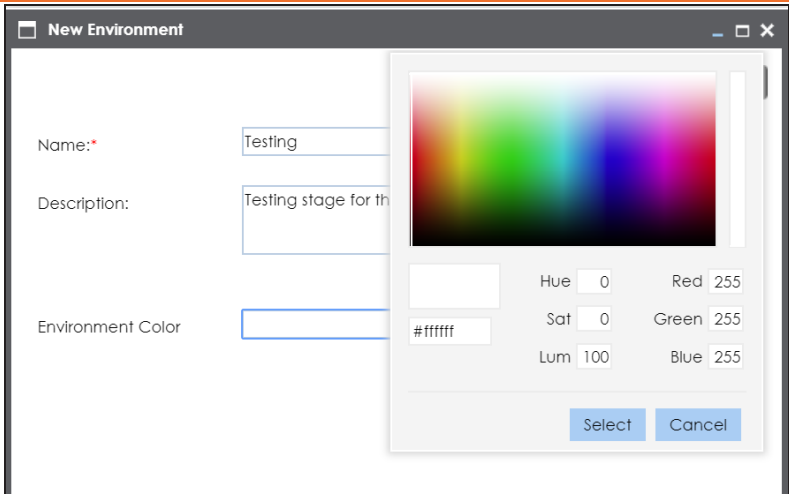
2. Click .

The New Environment page appears.

The screenshot shows the 'New Environment' form. It has three input fields: 'Name:*' (required), 'Description:', and 'Environment Color'. There are save and close icons in the top right corner.

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

Configuring Environments for Release Objects



5. Click **Select**.

6. Click .

The environment is added.

Environments Listing					
#	Name	Description	Environment Color	Options	
1	DEV				
2	TEST			  	
3	PROD				
4	Staging	This is the staging environment for Mapping object		  	

Edit

To edit the environment, click .

Delete

To delete the environment, click .

History

Configuring Environments for Release Objects

To view history details, click 

Configuring Release Object Types

The Release Manager comes with three default release object types:

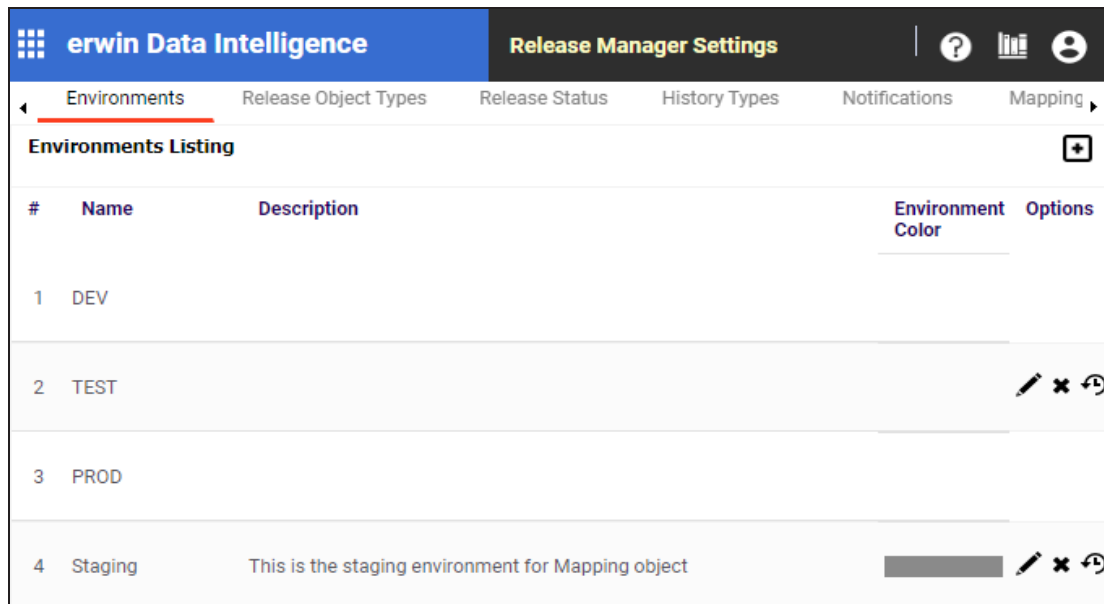
1. Data Item Mapping
2. Codeset
3. Code Mappings

You can add new release object types under the Miscellaneous Objects.

To add new release object types, follow these steps:

1. Go to **Application Menu > Miscellaneous > Settings > Release Manager**.

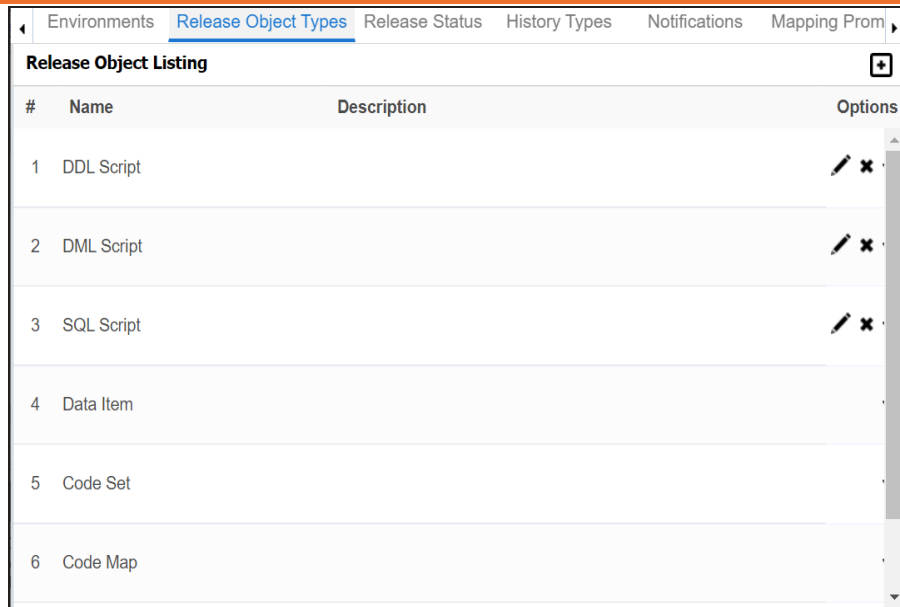
The following page appears.



2. Click the **Release Object Types** tab.

The Release Object Listing appears. Data Item, Code Set, Code Map are the default release object types, which can not be edited or deleted.

Configuring Release Object Types



Environments Release Object Types Release Status History Types Notifications Mapping Prom			
Release Object Listing			
#	Name	Description	Options
1	DDL Script		 
2	DML Script		 
3	SQL Script		 
4	Data Item		
5	Code Set		
6	Code Map		

3. Click .

The New Release Object Type page appears.

4. Enter the Name and the Description of the release object type.

5. Click .

The new release object type is added and can be accessed under Miscellaneous Objects.

Use the following options:

Edit

To edit the release object type, click .

Delete

To delete the release object type, click .

History

To view history details, click .

Configuring Release and Release Object Statuses

You can create multiple release and release object statuses to manage your releases in the Release Manager.

To configure release status and release object status, follow these steps:

1. Go to **Application Menu > Settings > Release Manager**.
2. Click Release Status.

The Release Status Listing appears.

◀ Environments Release Object Types Release Status History Types Notifications Mapping Promotion ▶					
Release Status Listing +					
#	Name	Description	Release Preview	Migration Object Preview	Options
1	PENDING APPROVAL		PENDING APPROVAL	PENDING APPROVAL	  
2	PENDING CONFIRMATION		PENDING CONFIRMATION	PENDING CONFIRMATION	  
3	VALIDATED		VALIDATED	VALIDATED	  

3. Click + to define a new status.

The New Release Status page appears.

Configuring Release and Release Object Statuses

New Release status

Status Title:*

Description

Release Status

Text Color:

Background:

Border Color:

Border Type:

Preview:

Migration Object Status

Text Color:

Background:

Border Color:

Border Type:

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

Field Name	Sub-Field	Description
Status Title		Enter a small description of the release object.
Description		Live Date is autofilled and it is same as the live date of the release. Enter the Live Time in HH : MM format.
Release Status	Text Colour	Click the cell and select the required text colour for the Release Status.
	Background	Click the cell and select the required background colour for the Release Status.
	Border Color	Click the cell and select the required border colour for the Release Status.
	Border Type	Select the required border type for the Release Status.
	Preview	You can view the preview of the release status based

Configuring Release and Release Object Statuses

Field Name	Sub-Field	Description
		on your above selections.
Migration Object Status	Text Colour	Click the cell and select the required text colour for the Object Status.
	Background	Click the cell and select the required background colour for the Object Status.
	Border Colour	Click the cell and select the required border colour for the Object Status.
	Border Type	Select the required border type for the Object Status.
	Preview	You can view the preview of the release status based on your above selections.

5. Click .

The new release/release object status is created and saved in the Release Status Listing.

Use the following options:

Edit

To edit the release status, click .

Delete

To delete the release status, click .

History

To view history details, click .

Configuring History Types

You can manage your activity logs in the Release Manager by configuring history types as per your requirements.

To configure history types, follow these steps:

1. Go to **Application Menu > Settings > Release Manager**.
2. Click **History Types**.

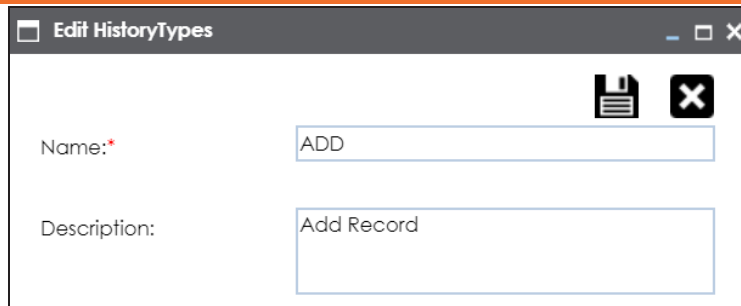
The History Listing Grid page appears.

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

3. To edit the description, click .

The Edit History Types page appears.

Configuring History Types



Edit HistoryTypes

Name:*

Description:

4. Edit the Description and click .

The description is saved in the History Listing Grid.

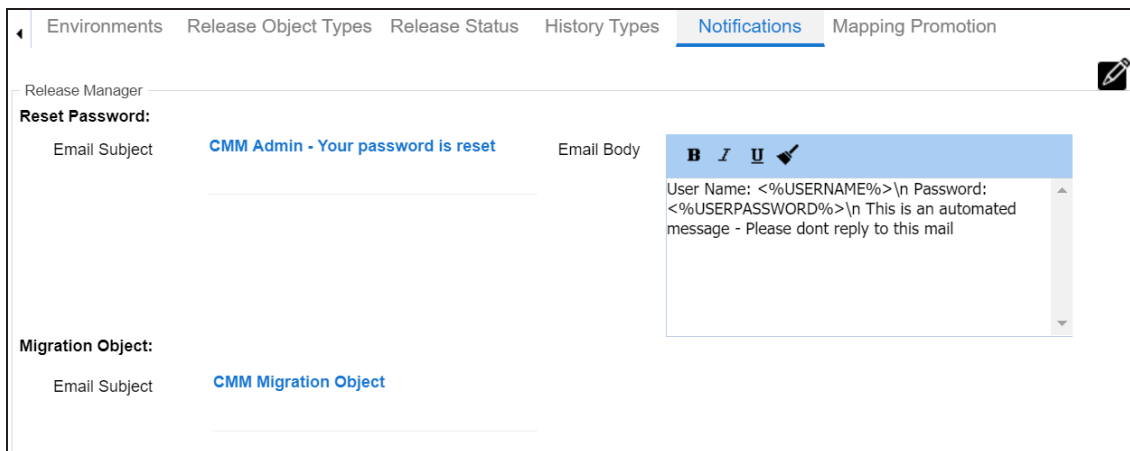
Configuring Notifications about Release Objects

You can send email notifications to your team members after adding a release object to a release in the Release Manager.

To configure notifications about release objects, follow these steps:

1. Go to **Application Menu > Settings > Release Manager**.
2. Click **Notifications**.

The following page appears.



The screenshot shows the 'Notifications' tab in the Release Manager settings. It features two sections: 'Reset Password' and 'Migration Object'. Each section has an 'Email Subject' field and an 'Email Body' field. The 'Email Body' field is a rich text editor with bold, italic, underline, and link icons. The 'Reset Password' section shows a sample email subject 'CMM Admin - Your password is reset' and a sample email body: 'User Name: <%USERNAME%>\n Password: <%USERPASSWORD%>\n This is an automated message - Please dont reply to this mail'. The 'Migration Object' section shows a sample email subject 'CMM Migration Object'.

Section	Email Subject	Email Body
Reset Password	CMM Admin - Your password is reset	User Name: <%USERNAME%>\n Password: <%USERPASSWORD%>\n This is an automated message - Please dont reply to this mail
Migration Object	CMM Migration Object	

3. Click .
4. In **Migration Object**, type the format of the email subject.

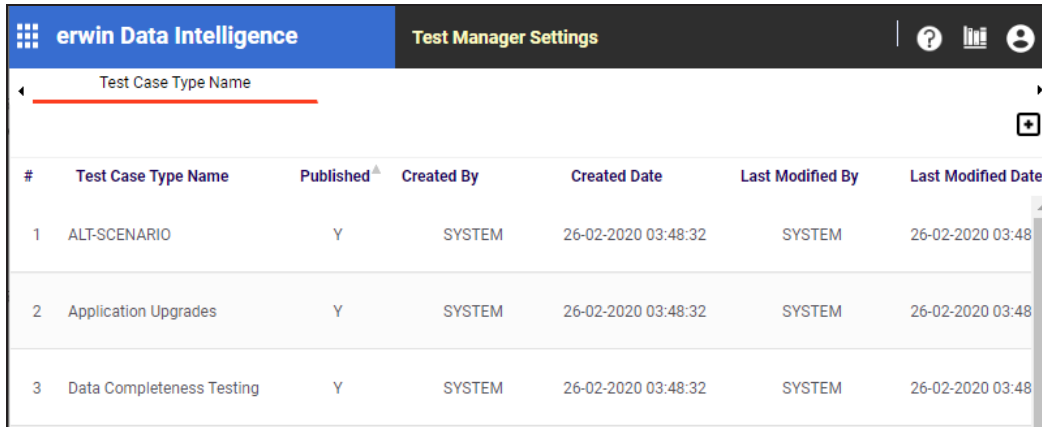
This email is used to send notifications to any concerned team member from the Admin Email Id which can be configured in [Email Settings](#).

Configuring Test Manager

You can add types of test cases as per your requirements. The list appears as option while creating test cases in the Metadata Manager and the Mapping Manager.

To configure test case types, follow these steps:

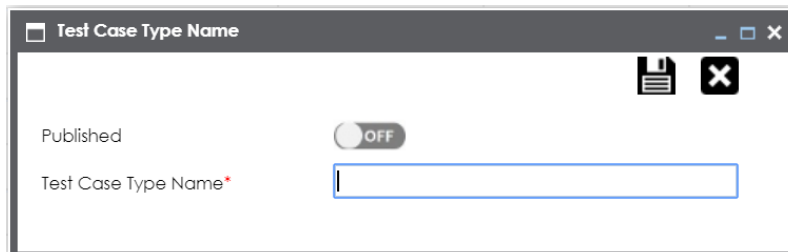
1. Go to **Application Menu > Settings > Test Manager**.



#	Test Case Type Name	Published	Created By	Created Date	Last Modified By	Last Modified Date
1	ALT-SCENARIO	Y	SYSTEM	26-02-2020 03:48:32	SYSTEM	26-02-2020 03:48
2	Application Upgrades	Y	SYSTEM	26-02-2020 03:48:32	SYSTEM	26-02-2020 03:48
3	Data Completeness Testing	Y	SYSTEM	26-02-2020 03:48:32	SYSTEM	26-02-2020 03:48

2. Click .

The following page appears.



Test Case Type Name

Published ☐ OFF

Test Case Type Name*

3. Type the Test Case Type Name and turn **Published** to **ON**.
4. Click .

The new test case type is added to the list.

Configuring Requirements Manager

The Requirements Manager Settings page enables you to set up the Requirements Manager with respect to:

- [Templates](#): Under this, you can create your own template and enrich it by adding artifacts to it. You can also design custom form for an artifact.
- [Email settings](#): Under this, you can configure email templates and trigger email notifications to project users when different operations are performed on a Specification, Artifact, and Specification Artifact or Child Artifact.
- [Version display](#): Under this, you can choose to display versions of specifications in two of the ways.

To access Requirements Manager, go to **Application Menu > Settings > Requirements Manager**. The Requirements Manager Settings page appears:

The screenshot shows the 'erwin Data Intelligence' interface with the 'Requirements Manager Settings' page. The 'Templates' tab is selected, showing a 'Specification Templates Workspace' on the left and a 'Templates Summary' table on the right.

Specification Templates Workspace

- Specification Templates
 - Default
 - TechPubs

Templates Summary

#	Template Name	Template Description	Created By	Created Date	Modified By	Modified Date
1	Default	Default Template	Administrator	26-02-2020 03:48:32	Administrator	26-02-2020 03:48:32
2	TechPubs		Administrator	08-07-2020 04:27:16	Administrator	08-07-2020 04:27:16

Creating Templates

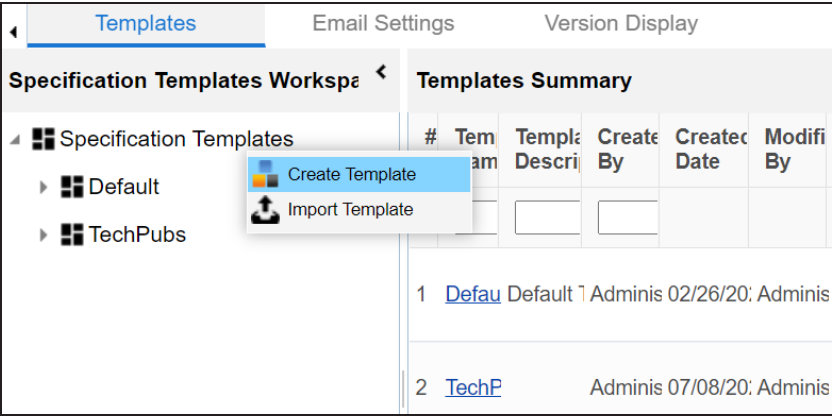
You can create customized requirement templates and use them to create requirement specifications.

To create templates, follow these steps:

- 1. Go to **Application Menu > Settings > Requirements Manager**.

The Requirements Manager Settings page appears. By default, the Templates settings open.

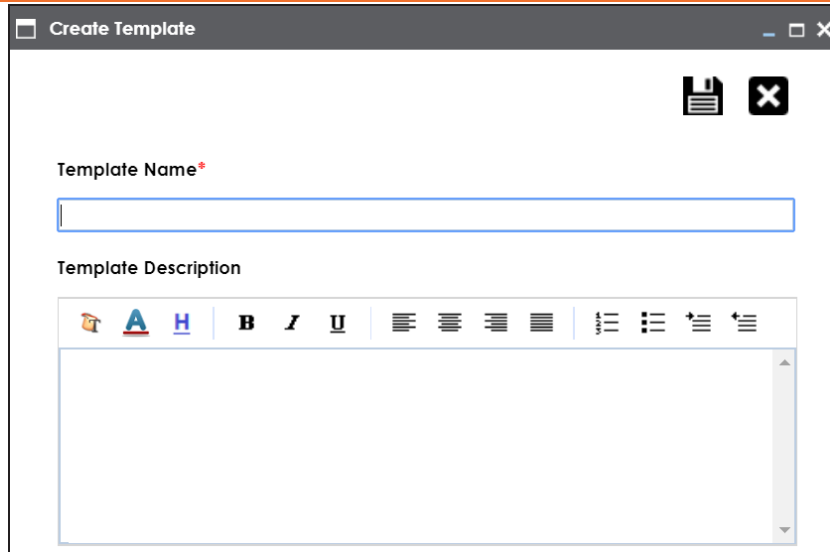
- 2. In the **Specification Templates Workspace** pane, right-click the **Specifications Templates** node.



- 3. Click **Create Template**.

The Create Template page appears.

Creating Templates



4. Enter **Template Name** and **Template Description**.

For example:

- **Template Name:** Health Migration Template
- **Template Description:** This is a template to capture requirements of the health migration project.

5. Click .

The template is created and saved in the Specifications Templates tree.

Once a template is created, you can do the following:

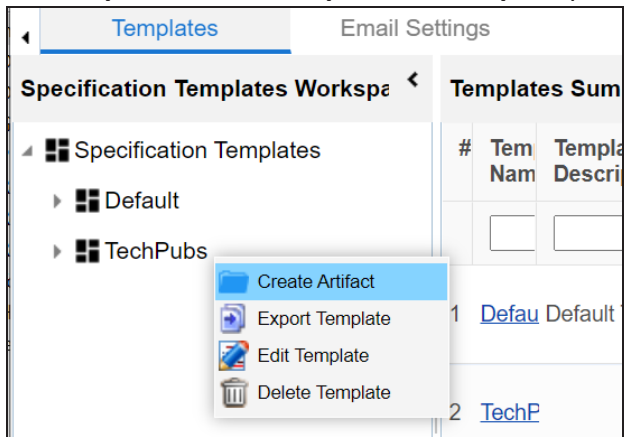
- [Add artifacts to the template](#)
- [Design custom forms for artifacts](#)
- [Manage artifacts](#)
- [Manage templates](#)

Adding Artifacts to Templates

You can enrich a templates with artifacts and supporting documents.

To add artifacts to templates, follow these steps:

1. In the **Specification Templates Workspace** pane, right-click the required template.



Adding Artifacts to Templates

2. Click **Create Artifact**.

The Create Artifact page appears.

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

Field Name	Description
Artifact Name	Specifies the name of the artifact. For example, Enrollments.
Artifact Description	Specifies the description about the artifact. For example: The artifact can document all decisions for Person and Enrollment module.
Tree Node Policy	Specifies the artifact's visibility in the artifact tree in the Requirements Manager. Select an appropriate Tree Node Policy for the artifact: • Display Always: Displays the artifact in the artifact tree.

Adding Artifacts to Templates

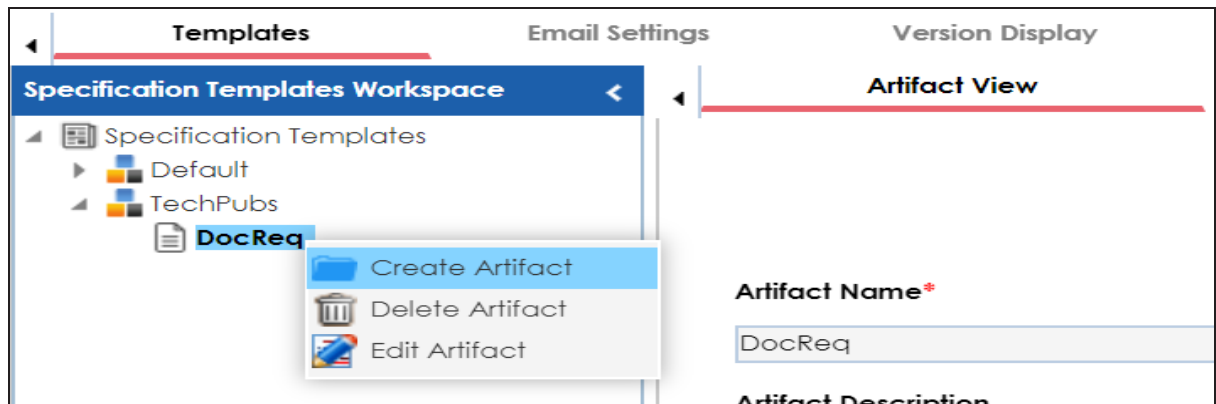
Field Name	Description
	• Don't display for single child: Does not display the artifact in the artifact tree. • Display on multiple child nodes: Displays artifacts when it has more than one child artifacts.
Support Documents Upload	Enables the document upload section for the child artifacts. Switch the Supporting Documents Upload option ON to upload documents.
Enable Description	Enables you to add a description to the child artifacts. Switch the Enable Description option ON to enter a description.
Mail Comments	Specifies the mail comments that are sent to project users. For example: This artifact is a part of Health Migration Template. Use this field if the template is being used in any project for creating a specification.

4. Click .

The artifact is created and added to the template.

You can add supporting artifacts to your artifacts. To add sub-artifacts, follow these steps:

1. Right-click an artifact and click **Create Artifact**.



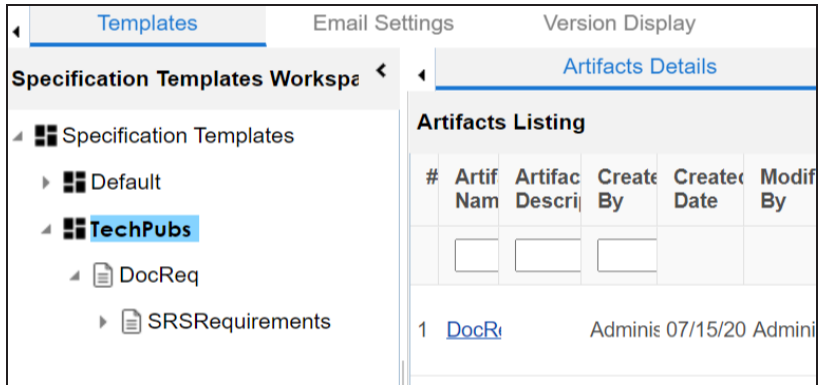
The Create Artifact page appears.

2. Enter the required fields and click .

Adding Artifacts to Templates

Refer to the field description table above.

The sub-artifact is created and is added to the artifact tree.



The screenshot shows a web application interface with a sidebar and a main content area. The sidebar, titled 'Specification Templates Workspace', contains a tree view with 'Specification Templates' expanded, showing 'Default' and 'TechPubs' (highlighted). Under 'TechPubs' are 'DocReq' and 'SRSRequirements'. The main content area has tabs for 'Email Settings' and 'Version Display', with 'Artifacts Details' selected. Below this is the 'Artifacts Listing' table.

#	Artif Nam	Artifac Descri	Create By	Created Date	Modif By
1	DocRe		Adminis	07/15/20	Admini

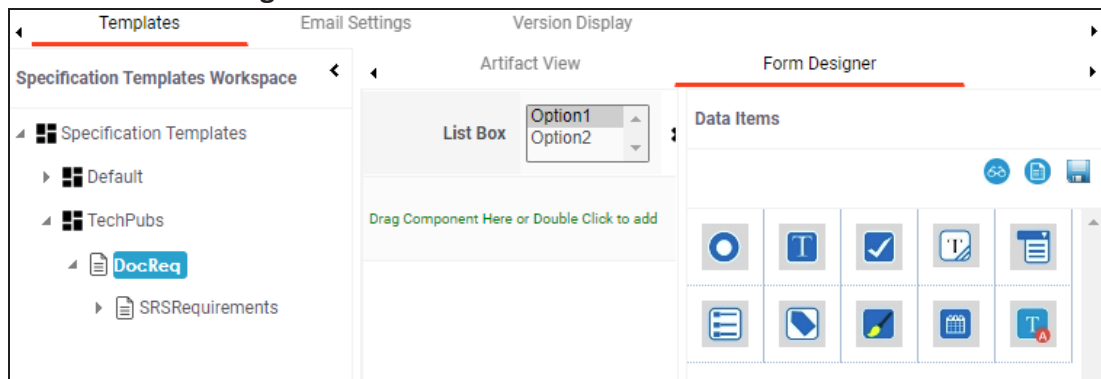
Once you have added an artifact to a template, you can [create custom forms](#) for the artifact.

Designing Forms

You can design a custom form for an artifact. The custom form is applicable to all child artifacts.

To design forms, follow these steps:

1. In the **Specification Templates Workspace** pane, click an artifact.
2. Click the **Form Designer** tab.



From this page, you can access the following panes:

- **Data Items:** This pane displays the available UI elements
 - **Properties:** This pane displays the properties of the selected UI element in the form designing space
3. Double-click, or drag and drop an UI elements from the Data Items pane to the designing space.
 4. Select a UI element in the designing space to view and configure their properties in the Properties pane.

Designing Forms

The screenshot displays the 'Form Designer' window. On the left, there are two component palettes: 'List Box' and 'Radio Button'. The 'List Box' palette shows a dropdown menu with 'Option1' and 'Option2'. The 'Radio Button' palette shows two radio buttons, 'Option1' (selected) and 'Option2'. Below these palettes is a green text prompt: 'Drag Component Here or Double Click to add to form designer'. On the right, there are two panels: 'Data Items' and 'Properties'. The 'Data Items' panel shows a grid of icons representing different data types. The 'Properties' panel shows a table with the following properties and values:

Property	Value
Name	radiobutton383
Label	Radio Button
Type	Radio



The properties differ based on the UI element you select.

Refer to the following table for property descriptions:

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

Designing Forms

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

5. Also, you can:

- Click  to view form properties
- Click  for preview

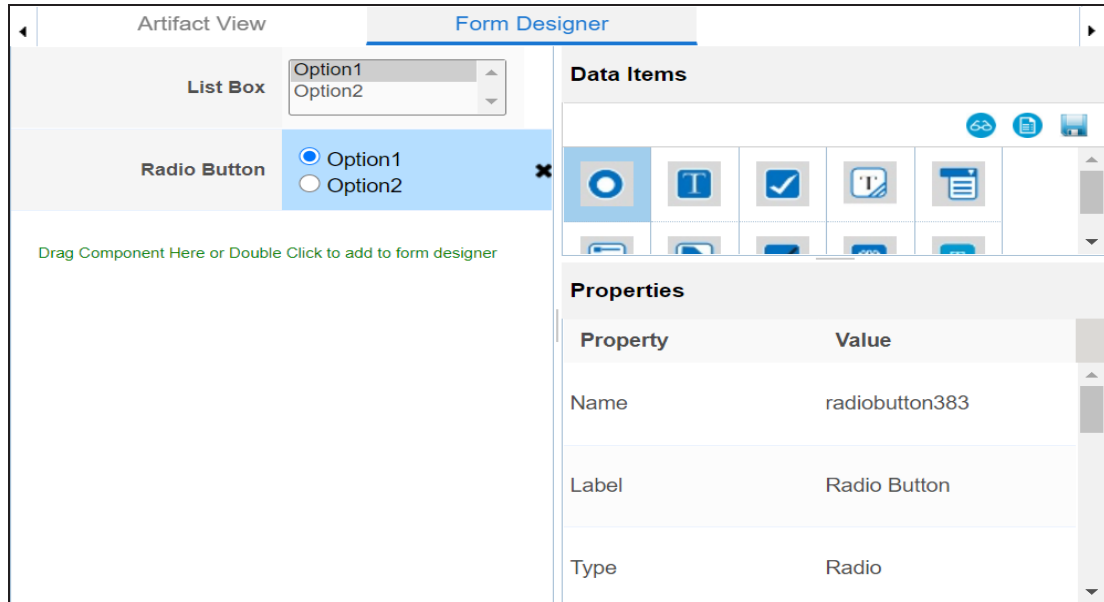
6. Click .

The Master Template Option is saved.

Designing Forms

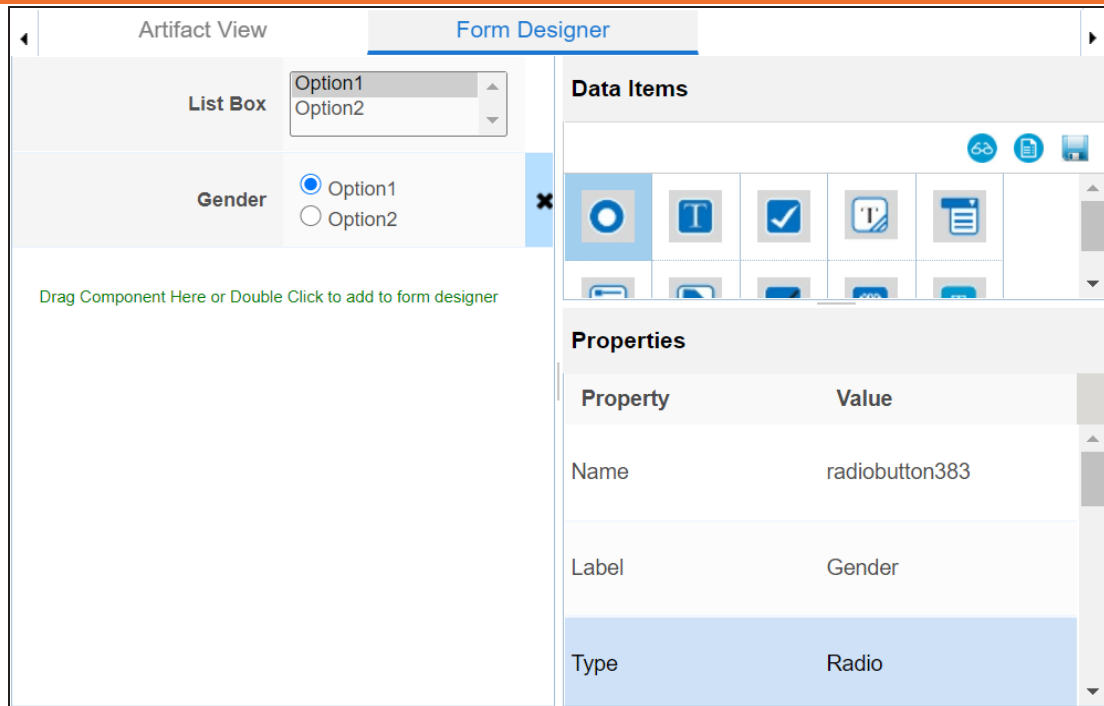
To understand designing forms, for example, follow the steps to add and configure a radio button:

1. Double-click, or drag and drop the Radio Button icon from Data Items to the space provided to design the form.

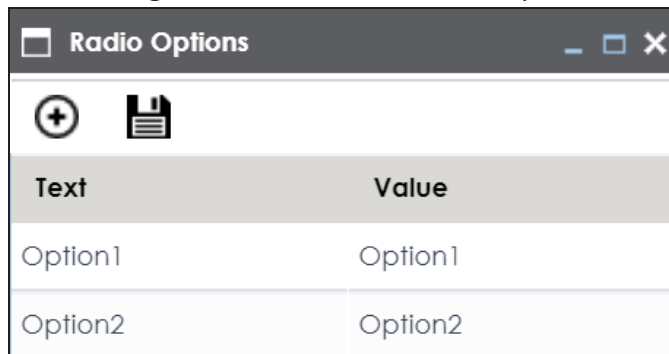


2. Click the cell containing Option 1.
You can view the properties of the data item.
3. Double-click the **Value** cell corresponding to **Label** and edit it to change the Label.
For example, we changed it to Gender and the form appears as shown below.

Designing Forms



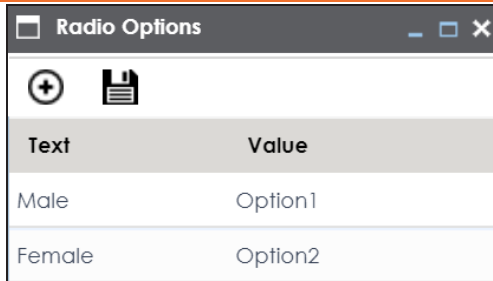
4. Click  against the **List** to edit radio options.



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

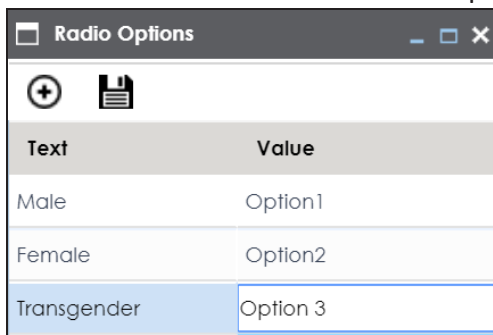
We edited Option 1 text and Option 2 text and entered Male, and Female respectively.

Designing Forms



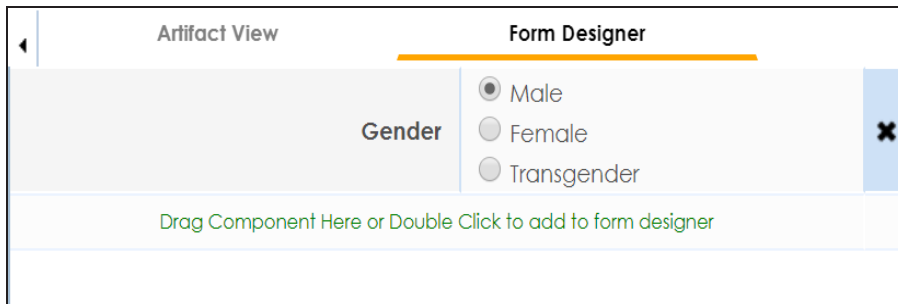
Text	Value
Male	Option1
Female	Option2

6. Click  to add more options.
One row is added.
7. Double-click the cells to enter the option.



Text	Value
Male	Option1
Female	Option2
Transgender	Option 3

8. Click .
- The options in the form are modified.



Artifact View Form Designer

Gender

☒ Male
☐ Female
☐ Transgender

Drag Component Here or Double Click to add to form designer

9. Click .
- The Master Template Option is saved.

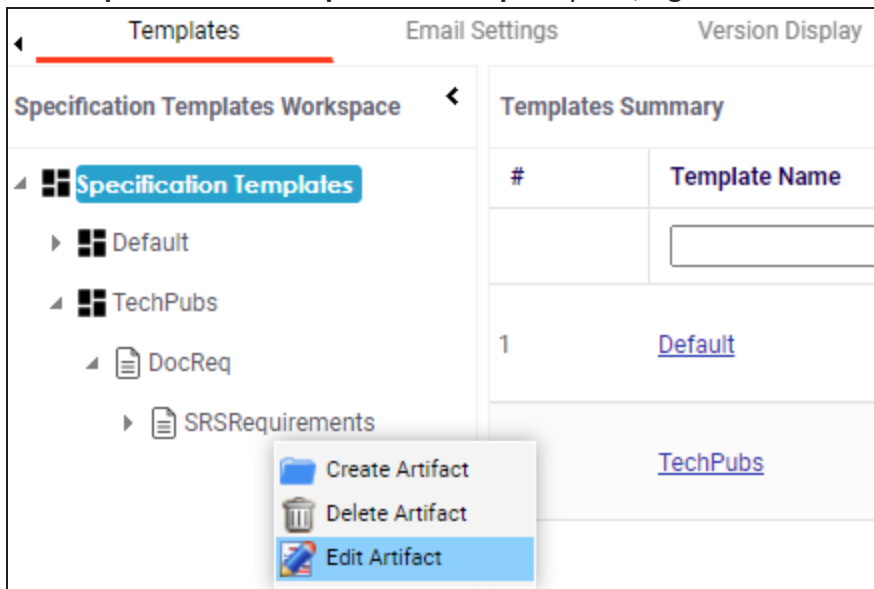
Managing Artifacts

Managing artifacts involves:

- Editing artifacts
- Deleting artifacts

To edit artifacts, follow these steps:

1. In the **Specification Templates Workspace** pane, right-click an artifact.



2. Click **Edit Artifact**.

The Artifact View tab appears in editable mode.

Managing Artifacts

The screenshot shows the 'Artifact View' form designer. At the top, there are tabs for 'Artifact View' and 'Form Designer'. The main form contains the following fields and controls:

- Artifact Name***: A text input field containing 'SRSRequirements'.
- Artifact Description**: A rich text editor with a toolbar (bold, italic, underline, list, link, unlink, etc.) and a text area.
- Created By**: A text field containing 'Administrator'.
- Created Date**: A text field containing '08-12-2020 07:44:47'.
- Last Modified By**: A text field containing 'Administrator'.
- Last Modified Date**: A text field containing '08-12-2020 07:44:47'.
- Tree Node Policy**: A dropdown menu set to 'Display Always'.
- Support Documents Upload**: A toggle switch set to 'OFF'.
- Enable Description**: A toggle switch set to 'OFF'.
- Mail Comments**: A text area.

There are icons for saving (floppy disk) and closing (X) in the top right corner.

3. Edit the required information.

4. Click .

The updated information is saved.

To delete artifacts, follow these steps:

1. In the **Specification Templates Workspace** pane, right-click an artifact.
2. Click **Delete**.

A warning message appears to confirm deletion.

3. Click **Yes**.



Deleting an artifact removes all associated artifacts and specification artifacts.

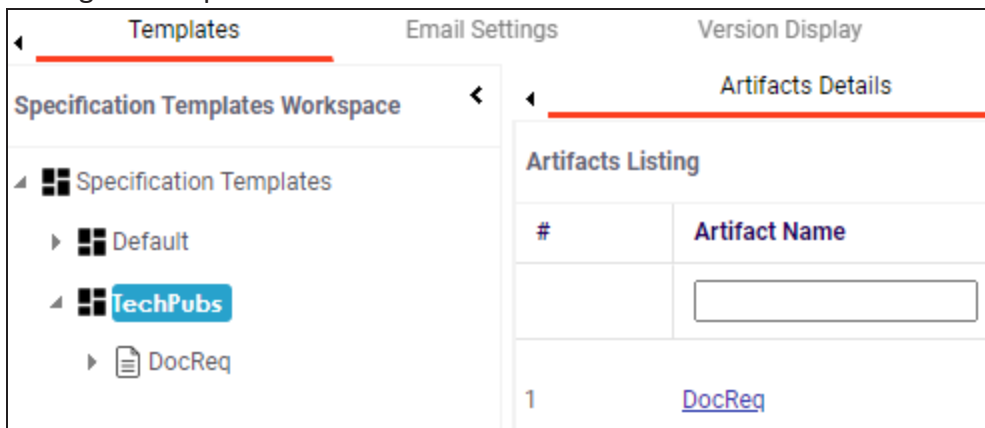
Managing Templates

Managing templates involves:

- Exporting templates
- Editing templates
- Deleting templates

To manage templates, follow these steps:

1. In the **Specification Templates Workspace** pane, right-click a template to view its management options.



2. Use the following options:

Export Template

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

Edit Template

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

Delete Template

Use this option to delete the template.

Configuring Email Settings

An administrator can set up templates for email notifications that are sent to project users whenever an action is performed on the following objects:

- Specification
- Artifact
- Specification Artifact



Specification artifact is also called as child artifact.

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

For example, you can configure a template for the artifact-add combination. Whenever an artifact is added, an email notification based on the template will be sent to project users from the administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

To configure email templates, follow these steps:

1. Go to **Application Menu > Settings > Requirements Manager**
2. Click the **Email Settings** tab.

The following page appears.

Templates					
Email Settings					
Version Display					
#	Template Name	Trigger On	Template Enabled?	Comments Enabled?	Options

3. Click

The Email Template page appears.

Configuring Email Settings

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

5. Click .

The template is created and saved under Email Settings.

Templates Email Settings Version Display					
#	Template Name	Trigger On	Template Enabled?	Comments Enabled?	Options
1	Template_Name	Artifact	✓	✓	   

Use the following options to manage email templates:

Preview Email Message ()

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

Edit ()

You can update the fields in an email template.

Delete ()

You can delete an email template that is no longer required.

History ()

Configuring Email Settings

You can view the activity logs of an email template and analyze all the actions performed on the email template.

Configuring Version Display

You can display specification version in two ways:

1. **Standard Specification Version:** This option displays the version of the specification in a standard form.

For example, Data_Mart (v.1.00), where Data_Mart is the Specification Name and 1.00 is the Specification Version.

2. **Version Label:** This option displays the version of the specification using a version label.

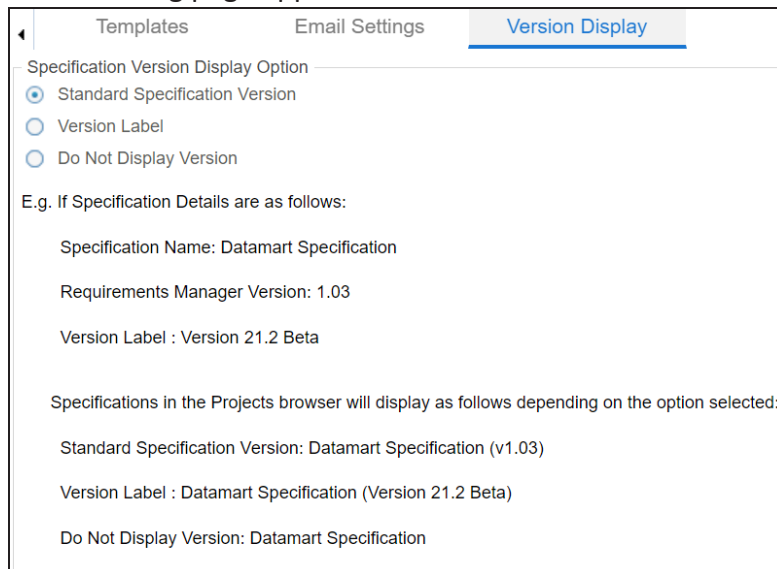
For example, Data_Mart (erwin_Mart) where Data_Mart is the specification name and erwin_Mart is the Version Label.

Version Label is specified while [creating specifications](#). You can also provide version label by editing specifications.

To configure version display of specifications, follow these steps:

1. Go to **Application Menu > Settings > Requirements Manager**.
2. Click the **Version Display** tab.

The following page appears.



Templates Email Settings **Version Display**

Specification Version Display Option

☒ Standard Specification Version

☐ Version Label

☐ Do Not Display Version

E.g. If Specification Details are as follows:

Specification Name: Datamart Specification

Requirements Manager Version: 1.03

Version Label : Version 21.2 Beta

Specifications in the Projects browser will display as follows depending on the option selected:

Standard Specification Version: Datamart Specification (v1.03)

Version Label : Datamart Specification (Version 21.2 Beta)

Do Not Display Version: Datamart Specification

Configuring Version Display

3. Use the following options:

Standard Specification Version

To display the version of specifications in standard mapping version, click **Standard Mapping Version**.

Version Label

To display the version of specifications using version label, click **Version Label**.

Do Not Display Version

To display maps without version, click **Do Not Display Version**.

Configuring Business Glossary Manager and Data Marketplace

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

- [Asset types](#)
- [Associations and relationships](#)
- [Miscellaneous configurations](#)

Under each of these, you can configure several settings that determine the properties of each asset type, their availability, and the appearance of the user interface.

Other than configuring the default asset types, you can add new asset types to the Business Glossary Manager and Data Marketplace. For more information, refer to the [Adding Asset Types](#) topic.

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

Configuring Business Glossary Manager and Data Marketplace

ASSET TYPESASSOCIATIONS & RELATIONSHIPSOTHER CONFIGURATIONS

Business Assets

BT Business Terms

T Test

BP Business Policies

CR Compliance Reports

BR Business Rules

ED erwin DM NSM

DN DM NSM Files

DA DS Agreements

I Issues

T Tags

SG Stewardship Goals

Asset DetailsCatalogBusiness Term

Name *Business Terms

Title *Business Term

DescriptionBusiness Terms Description

Color#1C5FABFG Color#FFFFFF

Documents Required☒

Enable Asset☒

Enable Definition☒

Enable Sensitivity Fields☒

Enable Scoring☒

Enable Dashboard☒

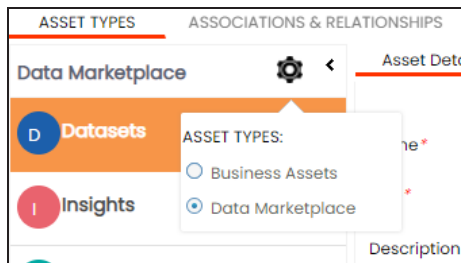
Display Order1.0

Image

Configuring Asset Types

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

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



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

To configure asset types, follow these steps:

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

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

Configuring Asset Types

The screenshot displays the 'Business Assets' configuration interface. On the left, a sidebar lists various asset types: Business Terms (BT), Test (T), Business Policies (BP), Compliance Reports (CR), Business Rules (BR), erwin DM NSM (ED), DM NSM Files (DN), DS Agreements (DA), Issues (I), Tags (T), and Stewardship Goals (SG). The 'Business Terms' asset type is selected and highlighted in orange. The main area shows the 'Asset Details' tab for 'Business Terms'. The configuration fields include: Name (Business Terms), Title (Business Term), Description (Business Terms Description), Color (#1C5FAB), FG Color (#FFFFFF), Documents Required (checked), Enable Asset (checked), Enable Definition (checked), Enable Sensitivity Fields (checked), Enable Scoring (checked with a gear icon), Enable Dashboard (checked), Display Order (1.0), and Image (a document icon).

2. In the **Business Assets** pane, select an asset type.
The corresponding settings appear in the right pane. These settings are grouped into three different tabs: Asset Details, Catalog or Category, and <Asset Name>. However, the tabs differ based on the asset type that you select.
3. Work on each tab to configure asset types:
 - **Asset Details:** Use this tab to configure basics of the asset. For example, name, description, and appearance. For more information, refer to the [Configuring Asset Details](#) topic.
 - **Catalog or Category:** Use this tab to set up a form for asset type container. For example, a catalog or category. For more information, refer to the [Configuring Catalog Form](#) topic.
 - **<Asset Name>:** Use this tab to set up a form for additional information of the asset. For more information, refer to the [Configuring Asset Form](#) topic.

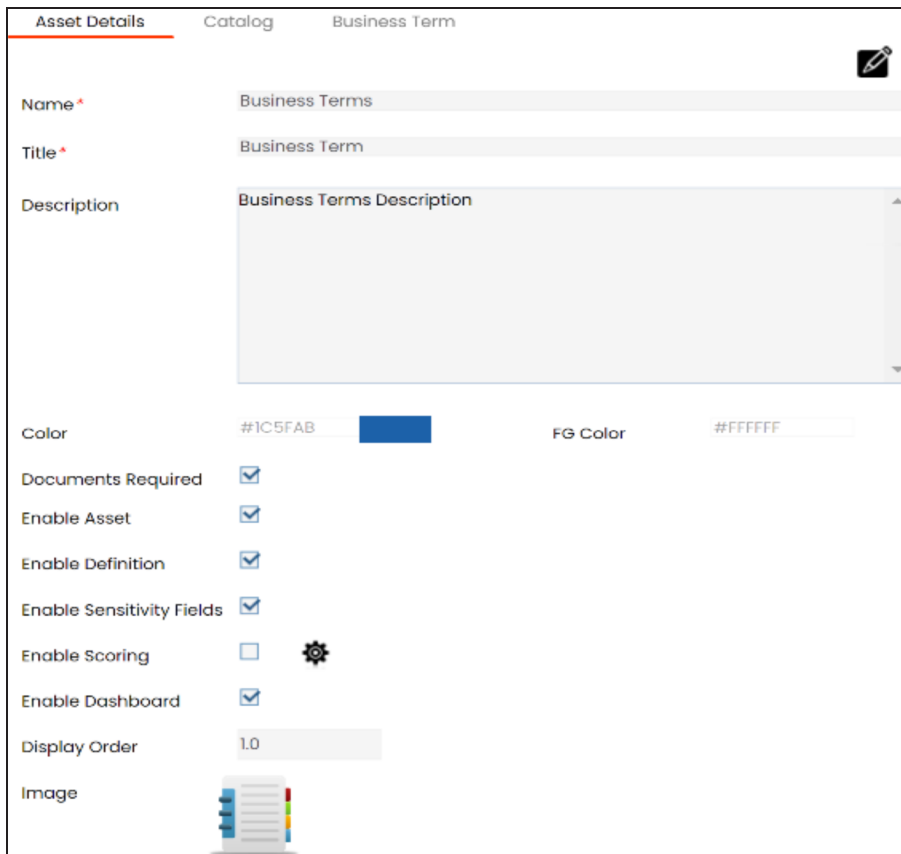
Configuring Asset Details

Configure the basic properties of an asset type, such as its name, availability, and more on the Asset Details tab. By default, all the settings open in the read-only mode.

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

To configure asset details, follow these steps:

1. On the Asset Details tab, click .



The screenshot shows the 'Asset Details' configuration form for 'Business Terms'. The form is divided into three tabs: 'Asset Details' (selected), 'Catalog', and 'Business Term'. The 'Asset Details' tab contains the following fields and settings:

- Name ***: Business Terms
- Title ***: Business Term
- Description**: Business Terms Description
- Color**: #1C5FAB (with a blue color swatch)
- FG Color**: #FFFFFF (with a white color swatch)
- Documents Required**: ☒
- Enable Asset**: ☒
- Enable Definition**: ☒
- Enable Sensitivity Fields**: ☒
- Enable Scoring**: ☐ (with a gear icon)
- Enable Dashboard**: ☒
- Display Order**: 1.0
- Image**: 

2. Edit the settings appropriately.



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

Configuring Asset Details



- Name
- Title
- Documents Required
- Enable Asset
- Enable Definition
- Image

Refer to the following table for field descriptions:

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

Configuring Asset Details

Field Name	Description
	• Sensitive Data Indicator (SDI) Classification: Specifies the SDI classification of the asset. For example, PHI. • Sensitive Data Indicator (SDI) Description: Specifies the description of the SDI classification. For example: Protected Health Information.
Enable Scoring	Specifies whether the scoring is enabled in the Business Glossary Manager. To configure scoring, click  . For more information, refer to the Configuring Data Value Score topic.
Enable Dashboard	Specifies whether the dashboard is enabled in the Business Glossary Manager.
Display Order	Specifies the number at which the asset type is available in Business Glossary Manager > Browser pane.
Image	Drag and drop a picture to represent the asset type or click  to browse and upload a picture.

3. Click .

The changes you made are available on the asset type creation page in the Business Glossary Manager. For more information, refer to the [Using Business Glossary Manager](#) topic.

To discard your changes, click .

Configuring Catalog Form

Asset types are grouped either under catalogs or categories that act as a container for assets. Design a form and configure the properties of catalog or category on the Catalog or Category tab. By default, all the settings open in the read-only mode.

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

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

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

The screenshot displays the 'Catalog' configuration interface. At the top, there are tabs for 'ASSET TYPES', 'ASSOCIATIONS & RELATIONSHIPS', and 'OTHER CONFIGURATIONS'. Under 'ASSET TYPES', there are sub-tabs for 'Asset Details', 'Catalog', and 'Business Term'. The 'Catalog' sub-tab is active, showing 'Edit' and 'Delete' buttons. Below this is the 'Field Controls' pane with icons for Group, Text Box, Combo Box, List, Radio, Check Box, and Number. The 'Configure Form' pane is divided into two sections. The left section shows a 'Text Box' field and a 'List' field with options 'Winter', 'Snow', and 'Sky'. The right section is a table for configuring form properties.

Property	Value
Published	☒
Field	Text Box
Type	Text Box
Mandatory	☐

The Catalog tab contains the following sections:

- **Field Controls:** This pane displays the available UI elements.
- **Configure Form:** This pane is the canvas where you design the form using the UI elements available in the Field Controls pane.

Configuring Catalog Form

- **Properties:** This pane displays the properties of the UI element selected in the Configure Form pane.
2. Drag and drop the required UI elements from the Field Controls pane to the Configure Form pane.
 3. Select UI elements, one at a time, and configure their properties in the Properties pane.

ASSET TYPES ASSOCIATIONS & RELATIONSHIPS OTHER CONFIGURATIONS

Asset Details **Catalog** Business Term

Save Cancel Delete

Field Controls

Group Text Box Combo Box List Radio Check Box Number

Configure Form

Text Box

Type ☒ Business Term

List

Winter
Snow
Sky

Configure Form

Property	Value
Published	ON
Field	Type
Type	Radio

Configure Values Configure

Description

Note: 1. Double click on the field cell to update the field name
2. Select the field name to update its properties



The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description
Published	Switch Published to ON to publish the field.
Field	Set the element label.

Configuring Catalog Form

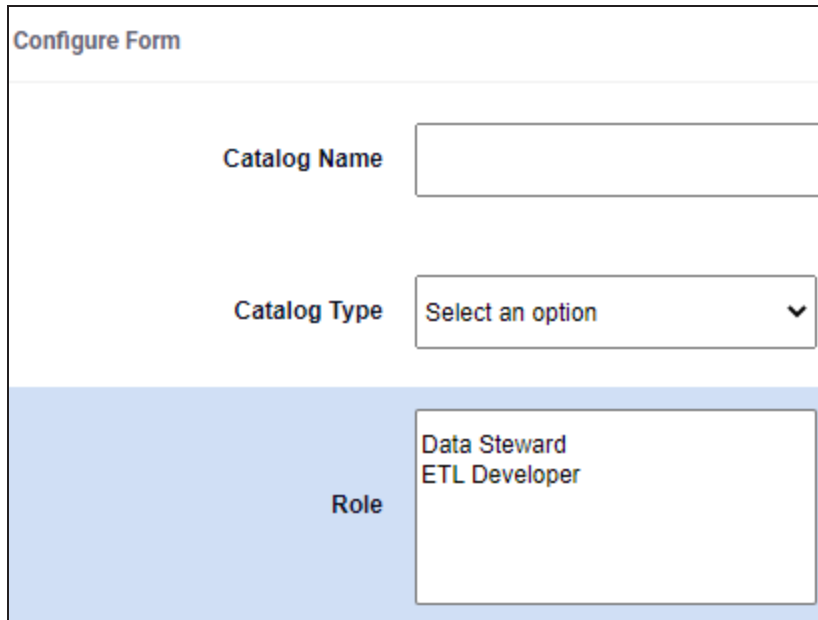
Property	Description
Type	Select the element type. By default, it is set to the element that you added. However, you can change the type using this property.
Dependencies	Some elements depend on the values of other elements on the form. Select the elements on which your element depends. This property is available for List, Radio, Boolean, and Date Picker elements.
Configure Values	Click to configure the possible values available in an element. You can add custom values or select the data available in your environment. For example, the list available in a Combo Box.
Mandatory	Select whether documents can be attached to the asset type.
Regular Expression	Define a regular expression that must be fulfilled for the text entered in the text box. For example, a password text box should be validated for the correct password format. In that case, the regular expression would define the password criteria.
Description	Enter the description of the element.
Visible in Form	Switch Visible in Form to ON to make the field visible on the form.
Visible in Grid	Switch Visible in Grid to ON to make the field visible in the grid.
Order	Specifies the order of the field on the Extended Properties tab. To enter the order number, double-click the corresponding Value cell. You can also drag and move fields in the Configure Form pane to change their order. For example, if there are four elements on the page and the selected element must appear as the third element, set the order to 3.

4. Once, you have designed the form and configured the properties of all the UI elements, click **Save**.

The changes you made are available on the catalog or category creation page in the Business Glossary Manager. For more information on creating catalogs, refer to the [Creating Catalogs](#) topic.

Configuring Catalog Form

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

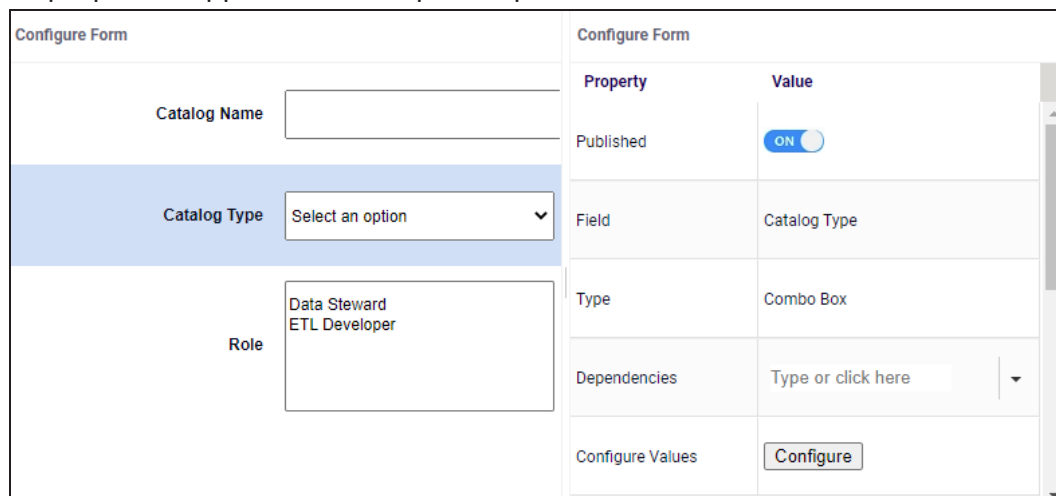


The image shows a 'Configure Form' window with three fields: 'Catalog Name' (text box), 'Catalog Type' (combo box with 'Select an option' and a dropdown arrow), and 'Role' (list box with 'Data Steward' and 'ETL Developer'). The 'Role' field is highlighted with a blue background.

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

1. Select the Catalog Type element.

Its properties appear in the Properties pane.



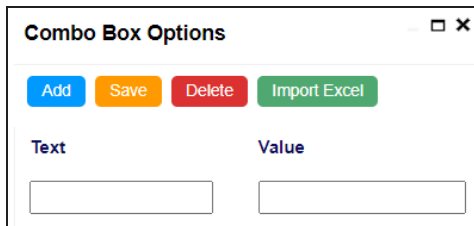
The image shows the 'Configure Form' window with the 'Catalog Type' field selected. To the right, a 'Properties' pane is visible, showing the following properties and values:

Property	Value
Published	☒ ON
Field	Catalog Type
Type	Combo Box
Dependencies	Type or click here
Configure Values	Configure

Configuring Catalog Form

2. Click **Configure**.

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



The image shows a window titled "Combo Box Options". At the top, there are four buttons: "Add" (blue), "Save" (orange), "Delete" (red), and "Import Excel" (green). Below these buttons, there are two columns. The first column is labeled "Text" and the second is labeled "Value". Each column has a text input field below its label.

3. Click **Add**.
4. Double-click cells in the grid to edit them.
5. Enter values under the Text and Value columns in each row.
6. Click **Save**.

The list you added appears in the Catalog Type combo box. The following image shows both, the Combo Box Options page and the Catalog Type combo box with the

list.

Combo Box Options

AddSaveDeleteImport Excel

TextValue

BusinessBusiness

DataData

PoliciesPolicies

Configure Form

Catalog Name

Catalog Type

Select an option

Select an option

Business

Data

Policies

ETC Developer

Role

Configuration Guide | 101

Configuring Asset Form

Assets are the business assets (business terms, business rules, business policy, and so on) that you work on in the Business Glossary Manager, and marketplace assets (datasets) in the Data Marketplace module. For each asset type, apart from its default properties, you can configure custom properties. To do so, design a form and configure the custom properties on the <Asset Type> tab. By default, all the settings open in the read-only mode.

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

To design a form and configure custom asset properties, follow these steps:

1. On the <Asset Name> tab, click **Edit**.

For example, click **Edit** on the Business Term tab.

The screenshot displays the 'Business Term' configuration interface. At the top, there are three tabs: 'Asset Details', 'Catalog', and 'Business Term', with 'Business Term' being the active tab. Below the tabs are three buttons: 'Save' (blue), 'Cancel' (red), and 'Delete' (red). The main area is divided into two sections. The first section, titled 'Field Controls', contains a grid of ten UI element icons: 'Group' (blue square with white icon), 'Text Box' (blue square with white 'T'), 'Combo Box' (blue square with white icon), 'List' (blue square with white icon), 'Radio' (blue square with white icon), 'Check Box' (blue square with white checkmark), 'Number' (blue square with white 'T'), 'Boolean' (blue square with white checkmark), 'Date Picker' (blue square with white calendar icon), 'Category' (blue square with white icon), and 'Rich Editor' (blue square with white 'T' and red 'A'). The second section, titled 'Configure Form', is a large empty white area for designing the form.

The <Asset Name> tab contains the following sections:

- **Field Controls:** This pane displays the available UI elements.
- **Configure Form:** This pane is the canvas where you design the form using the UI elements available in the Field Controls pane.

Configuring Asset Form

- **Properties:** This pane displays the properties of the UI element selected in the Configure Form pane.
2. Drag and drop the required UI elements from the Field Controls pane to the Configure Form pane.
 3. Select UI elements, one at a time, and configure their properties in the Properties pane.

Asset Details Catalog **Business Term**

Save Cancel Delete

Field Controls

Group Text Box Combo Box List Radio Check Box Number Boolean Date Picker Category

Configure Form

Radio ☐ Solid ☐ Outline

Options
Winter
Summer
Outline
All of the above

Available ☐

Configure Form

Property	Value
Published	ON
Field	Radio
Type	Radio
Configure Values	Configure
Description	

Note: 1. Double click on the field cell to update the field name
2. Select the field name to update its properties



The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description
Published	Switch Published to ON to publish the field.
Field	Set the element label.
Type	Select the element type. By default, it is set to the element that you

Configuring Asset Form

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

Configuring Asset Form

Property	Description
	- Switch the Include Extended Properties option ON on the Discover Asset Settings page. - Schedule a synchronization job or manually synchronize the asset before you can filter assets on the Discover Assets module.
Order	Specifies the order of the field on the Extended Properties tab. To enter the order number, double-click the corresponding Value cell. You can also drag and move fields in the Configure Form pane to change their order. For example, if there are four elements on the page and the selected element must appear as the third element, set the order to 3.

- Once, you have designed the form and configured the properties of all the UI elements, click **Save**.

The changes you made are available on the asset creation page in the Business Glossary Manager. For more information on creating business assets, refer to the [Using Business Glossary Manager](#) topic.

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

Configuring Asset Form

Configure Form

Radio ☐ Solid ☐ Outline

Options Winter
Summer
Outline
All of the above

Available ☐

Preference Select an option ▼

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

1. Select the Preference element.
Its properties appear in the Properties pane.

Configure Form

Radio ☐ Solid ☐ Outline

Options Winter
Summer
Outline
All of the above

Available ☐

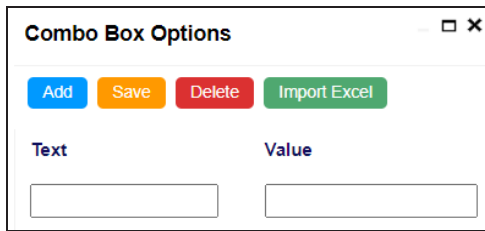
Preference Select an option ▼

Property	Value
Published	☒ ON
Field	Preference
Type	Combo Box
Configure Values	<button>Configure</button>
Mandatory	☐ OFF

2. Click **Configure**.
The Combo Box Options page appears. Use this page to add items to the Preference

Configuring Asset Form

combo box list.

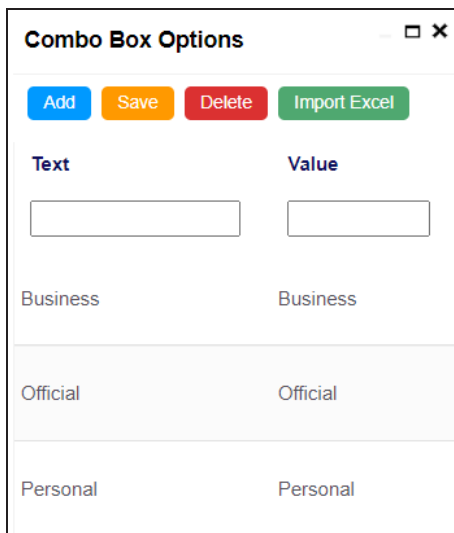


Combo Box Options

Add Save Delete Import Excel

Text Value

3. Click **Add**.
Rows are added to the grid on the page.
4. Double-click cells in the grid to edit them.
5. Enter values under the Text and Value columns in each row.



Combo Box Options

Add Save Delete Import Excel

Text	Value
Business	Business
Official	Official
Personal	Personal

6. Click **Save**.
The list you added in Step 5 appears in the Preference combo box. The following

Configuring Asset Form

image shows the Preference combo box with the list.

Configure Form

Radio

☐ Solid
☐ Outline

Options

Winter
Summer
Outline
All of the above

Available

☐

Preference

Select an option

Select an option

Business

Official

Personal

Combo Box

Adding Asset Types

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

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

To add custom asset types, follow these steps:

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

The Business Glossary Manager & Data Marketplace Settings page appears.

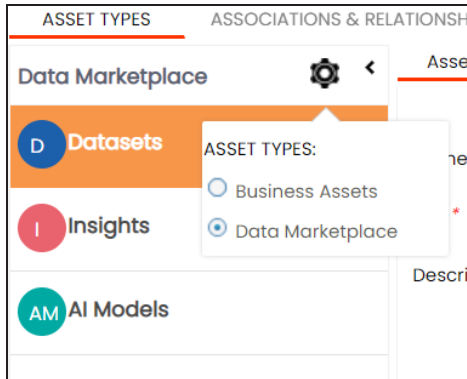
By default, it opens the ASSET TYPES settings for Business Assets.

The screenshot displays the 'Business Assets' settings page. On the left, there is a sidebar with a list of asset types: Business Terms (BT), Test (T), Business Policies (BP), Compliance Reports (CR), Business Rules (BR), erwin DM NSM (ED), DM NSM Files (DN), DS Agreements (DA), Issues (I), Tags (T), and Stewardship Goals (SG). The 'Business Terms' asset type is selected and highlighted in orange. On the right, the 'Asset Details' configuration panel is shown. It includes fields for Name (Business Terms), Title (Business Term), and Description (Business Terms Description). Below these fields, there are settings for Color (#1C5FAB), FG Color (#FFFFFF), Documents Required (checked), Enable Asset (checked), Enable Definition (checked), Enable Sensitivity Fields (checked), Enable Scoring (checked), Enable Dashboard (checked), Display Order (1.0), and an Image field with a document icon.

On the Business Assets tab, click  to choose an asset type from the list, and the

Adding Asset Types

assets are created in the respective module. For example, based on the screenshot below, new assets will be created and added to Data Marketplace Module.



Adding Asset Types

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

The New Asset Type page appears.

New Asset Type

Name*

Title*

Description

Color FG Color

Documents Required ☐

Enable ☐

Enable Definition ☒

Enable Sensitivity Fields ☐

Display Order

Image  

3. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

Refer to the following table for field descriptions.

Field Name	Description
Name	Enter a name for the asset type. This is used as the display name in the Business Assets pane on the Business Glossary Manager Settings and Business Glossary Manager pages.
Title	Enter a name for the <Asset Name> tab of the asset type's settings.
Description	Enter a description of the asset type.

Adding Asset Types

Field Name	Description
Color	Select a color to associate it with the asset. In the Business Glossary Manager, the asset type is displayed in the selected color.
Documents Required	Select whether documents can be attached to the asset type.
Enable	Select whether the asset type is enabled in the Business Glossary Manager.
Enable Definition	Select whether to enable the Definition field for the asset type in the Business Glossary Manager.
Enable Sensitivity Fields	Specifies whether the sensitivity fields for the asset type are enabled in the Business Glossary Manager. There are three sensitivity fields: • Sensitive Data Indicator (SDI): Specifies whether the asset is sensitive. • Sensitive Data Indicator (SDI) Classification: Specifies the SDI classification of the asset. For example, PHI. • Sensitive Data Indicator (SDI) Description: Specifies the description of the SDI classification. For example: Protected Health Information.
Display Order	Enter the number at which the asset type is available in Business Glossary Manager > Browser pane.
Image	Drag and drop a picture to represent the asset type or click  to browse and upload a picture.

4. Click .

The asset type is added to the Business Assets pane. Also, it is available in the Business Glossary Manager if you selected the **Enable** check box. For more information, refer to the [Managing Business Glossary](#) topic. Also, refer to Using Data Marketplace topic to learn more the accessing your new assets.

Configuring erwin DM NSM Asset

Using [DM Connect for DI](#), you can export naming standard mappings (NSM) from erwin Data Modeler (DM) to erwin Data Intelligence (erwin DI). These naming standards correspond to business glossary. They are exported to catalogs under **erwin DI > Business Glossary Manager > erwin DM NSM**. For the export job to run smoothly, you need to enable the erwin DM NSM asset type.

To enable erwin DM NSM asset type, follow these steps:

1. Go to **Application Menu > Settings > Business Glossary Manager**.
The Business Glossary Manager Settings page appears. By default, the ASSET TYPES settings open.
2. In the **BUSINESS ASSETS** pane, select **erwin DM NSM**.

The corresponding settings appear in the right pane.

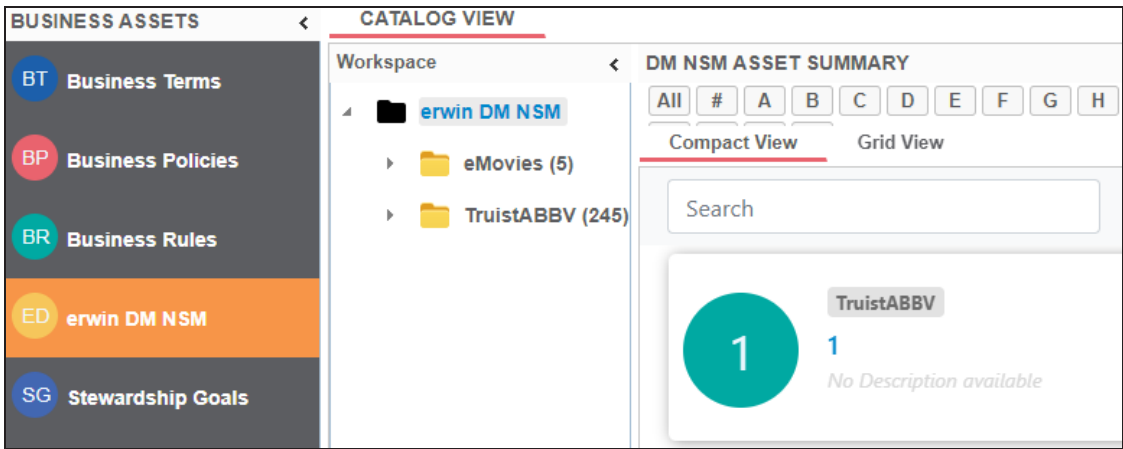
The screenshot displays the 'Business Glossary Manager' settings interface. On the left, the 'Business Assets' pane lists various asset types: Business Terms (BT), Business Policies (BP), Business Rules (BR), erwin DM NSM (ED, highlighted in orange), DM NSM Files (DN), DS Agreements (DA), Issues (I), and Tags (T). An 'Add New' button is visible at the bottom of this list. The main area is titled 'ASSET TYPES' and shows 'erwin DM NSM' selected. The 'Asset Details' tab is active, displaying the following configuration:

- Name***: erwin DM NSM
- Title***: DM NSM Asset
- Description**: To Share and reuse model objects within an organization, erwin DM uses Naming Standards for logical and physical objects in the model so that everyone in your organization uses the names consistently and correctly. The entries in this list are used to expand the abbreviated (cryptic) table/column names to Expanded Logical Name in Metadata Manager.
- Color**: #F6C65B (represented by a yellow square)
- Documents Required**: ☐
- Enable Asset**: ☐
- Enable Definition**: ☒
- Enable Sensitivity Fields**: ☐

Configuring erwin DM NSM Asset

3. On the **Asset Details** tab, select **Enable Asset**.

The erwin DM NSM asset is enabled in the Business Glossary Manager.



Configuring Associations and Relationships

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

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

To add associations, follow these steps:

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

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

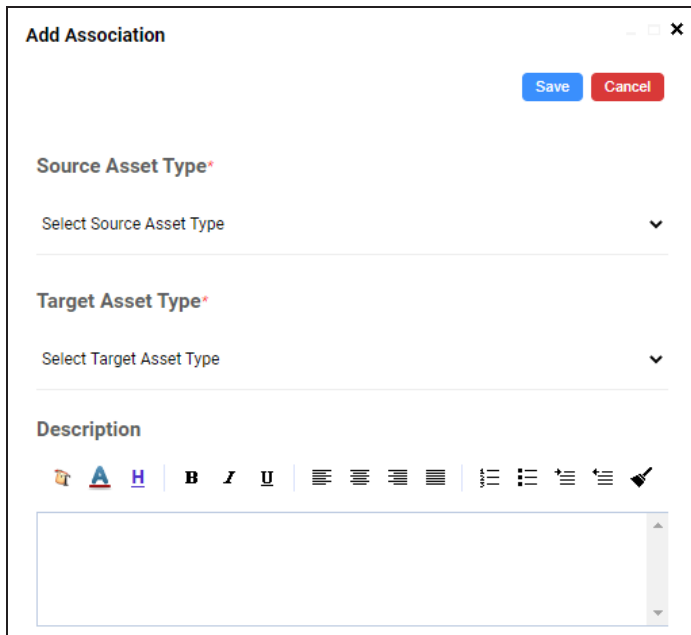
2. Go to the **Associations & Relationships** tab.

ASSET TYPES ASSOCIATIONS & RELATIONSHIPS OTHER CONFIGURATIONS						
Summary of Relationships						
#	Source Asset Type	Target Asset Type	Forward Relationship	Reverse Relationship	Description	Options
1	Business Terms	Business Terms				    
2	Business Terms	Business Policies				    
3	Business Terms	Column				    
4	Business Terms	Table				    
5	Business Terms	Environment				    

Configuring Associations and Relationships

3. Click **+**.

The Add Association page appears.



The screenshot shows a modal window titled "Add Association". At the top right are "Save" and "Cancel" buttons. Below them are two mandatory fields, "Source Asset Type*" and "Target Asset Type*", each with a dropdown menu labeled "Select Source Asset Type" and "Select Target Asset Type" respectively. At the bottom is a "Description" field with a rich text editor toolbar containing icons for bold, italic, underline, list, and other text formatting options.

4. Select or enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

Refer to the following table for field descriptions.

Field Name	Description
Source Asset Type	Select an asset type for which you want to create an association.
Target Asset Type	Select an asset type that you want to associate to the source asset type.
Description	Enter a description of the association.

Configuring Associations and Relationships

5. Click **Save**.

The association is added to the list of relationships.

ASSET TYPES ASSOCIATIONS & RELATIONSHIPS OTHER CONFIGURATIONS						
Summary of Relationships						
#	Source Asset Type	Target Asset Type	Forward Relationship	Reverse Relationship	Description	Options
1	Business Terms	Business Terms				    
2	Business Terms	Business Policies				    
3	Business Terms	Column				    
4	Business Terms	Table				    
5	Business Terms	Environment				    

Adding Relationships

Once an association is added, you can define the forward and reverse relationships between the source and target asset types. For example, for an association between Business Term and Business Policy, relationships can be as follows:

- **Forward Relationship:** Business Term **is associated with** Business Policy.
- **Reverse Relationship:** Business Policy **derives from** Business Term.

To add relationships to an association, follow these steps:

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

Configuring Associations and Relationships

Add Relationship

Save Cancel

Forward Relationship*

Reverse Relationship*

Description

Display Type: Single

Display Color: #5C5D61

2. Select or enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

Refer to the following table for field descriptions.

Field Name	Description
Forward Relationship	Enter a name of the relationship of source asset type with target asset type. For example, <i>is associated with</i> .
Reverse Relationship	Enter a name of the relationship of target asset type with the source asset type. For example, <i>derives from</i> .
Description	Enter a description of the association.
Display Type	Select a relationship notation.

Configuring Associations and Relationships

Field Name	Description
Display Color	Select a color to display the relationship.

3. Click **Save**.

Forward and reverse relationships are added to the list of relationships.

Summary of Relationships						
#	Source Asset Type	Target Asset Type	Forward Relationship	Reverse Relationship	Description	Options
1	► Business Terms	Business Terms				    
2	◄ Business Terms	Business Policies				    
			is Governed By	Governs		  

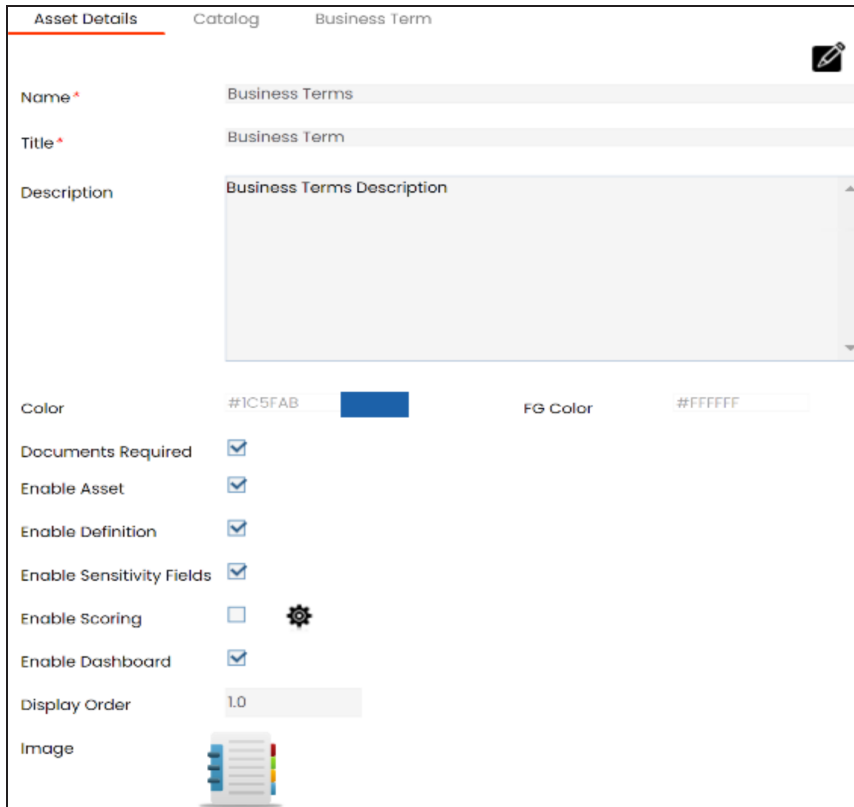
Configuring Data Value Score

Asset types are the business assets (business terms, business rules, business policies, and so on) that you work on. For each of the asset types, you can configure data value scoring.

The following steps walk you through configuring data value scoring for business assets.

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

1. On the Asset Details tab, click .



The screenshot shows the 'Asset Details' tab for a 'Business Term' asset. The form includes fields for Name, Title, and Description, all pre-filled with 'Business Terms', 'Business Term', and 'Business Terms Description' respectively. Below these are color selection options (Color: #1C5FAB, FG Color: #FFFFFF) and a series of checkboxes: 'Documents Required' (checked), 'Enable Asset' (checked), 'Enable Definition' (checked), 'Enable Sensitivity Fields' (checked), 'Enable Scoring' (unchecked, with a gear icon to its right), 'Enable Dashboard' (checked), and 'Display Order' (set to 1.0). An 'Image' field at the bottom shows a default icon of a document with a blue tab.

2. Select the **Enable Scoring** check box.

The scoring is enabled.

3. To configure scoring, click .

The Configure Scoring page appears.

Configuring Data Value Score

Configure Scoring

Score Name *

Data Value Score

Score Parameters and weightages

DQ Score

User Ratings

Asset Completeness

Score Classification

key

GOLD

key

SILVER

key

BRONZE

Enable Scoring as:

☒ Key

☐ Value

☐ Both

4. Enter or select appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Score Name	Specifies the name of the score For example, Business Term Score
DQ Score	Specifies the weight assigned to the Data Quality Score parameter Adjust the slider to set the weight for the Data Quality Score. For

Configuring Data Value Score

Field Name	Description
	example, 50%.
User Ratings	Specifies the weight assigned to the User Ratings parameter Adjust the slider to set the weight for User Ratings. For example, 20%.
Asset Completeness	Specifies the weight assigned to the Asset Completeness parameter Adjust the slider to set the weight for Asset Completeness. For example, 30%
Key	Specifies the score ranges for each classification level • Gold: Defines the Gold classification, representing the highest value assets. • Silver: Defines the Silver classification, representing mid-tier value assets. • Bronze: Defines the Bronze classification, representing the lowest value assets.
Enable Scoring as	Specifies the scoring mode • Key: Enables scoring based on key parameters • Value: Enables scoring based on value parameters • Both: Enables scoring based on both key and value parameters.

5. Click .

6. Click .

The changes you made are available on the asset type creation page in the Business Glossary Manager. For more information, refer to the [Using Business Glossary Manager](#) topic.

To discard your changes, click .

Other Configurations

Apart from the asset type and associations and relationship settings, you can configure other common properties of asset types, such as their visibility on the dashboard, classification, data collection type, and more. These properties appear as drop-down lists on the asset pages in the Business Glossary Manager.

To configure common properties, follow these steps:

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

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

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

The screenshot shows the 'Other Configurations' tab selected in the settings interface. It contains several configuration sections:

- Enable usage on Business Term**: A checkbox that is currently unchecked.
- Classification**: A list of asset types with a '+' icon to the right: Reference, Derived, Transactional, Operational.
- Data Collection Type**: A list of data collection types with a '+' icon to the right: Report, Report Section, Screen, Dashboard, Extract, API.
- Meaning Category Type**: A list of meaning categories: Conceptual, Logical, Physical.
- Data Object Type**: A list of data object types with a '+' icon to the right: Business Data Element, Data Collection, Physical Data Element.
- Enable usage on Business Rule**: A checkbox that is currently unchecked.
- Criticality**: A list of criticality levels with a '+' icon to the right: High, Low, Medium.
- Dashboard Visibility**: A list of dashboard visibility options, all of which are checked: Business Term, Business Policy, Business Rule.

3. Select **Enable usage on Business Term** or **Enable usage on Business Rule** to select the properties that you want to enable for Business Terms and Business Rules. You can add, and enable or disable the options available under each property. For more information, refer to the [Edit Property Options](#) section.
4. Under Dashboard Visibility, select the asset types that are available on the Business Glossary Manager dashboard.

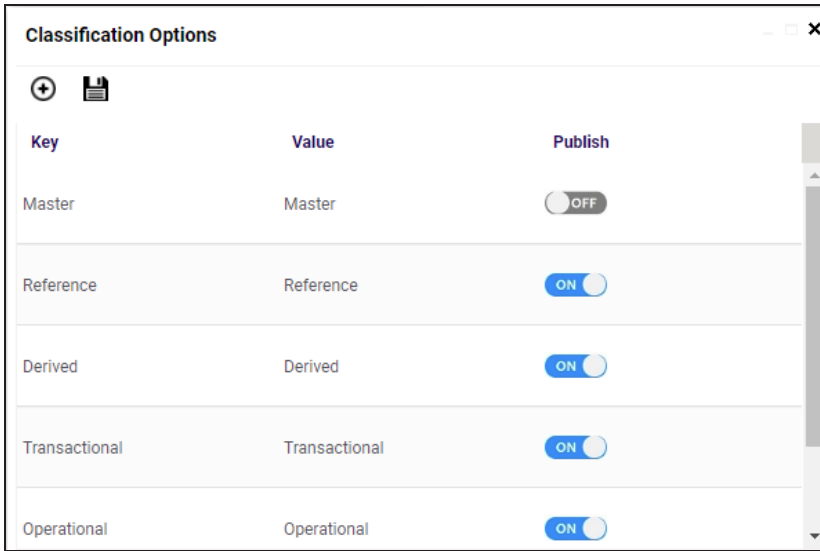
Edit Property Options

To edit property options, follow these steps:

1. Under a property, click .

The options page appears.

For example, the Classification Options page.



Key	Value	Publish
Master	Master	☐ OFF
Reference	Reference	☒ ON
Derived	Derived	☒ ON
Transactional	Transactional	☒ ON
Operational	Operational	☒ ON

2. Use the following options:

Add

This adds a blank Key-Value pair to the options list. In the blank option row, double-click the fields under **Key** and **Value** columns. Then, enter the new option in each field.

By default, the Publish setting of the new option is set to ON. This indicates that the option will be available in the drop-down list on the asset page.

Publish

Use the switch to enable or disable an option.

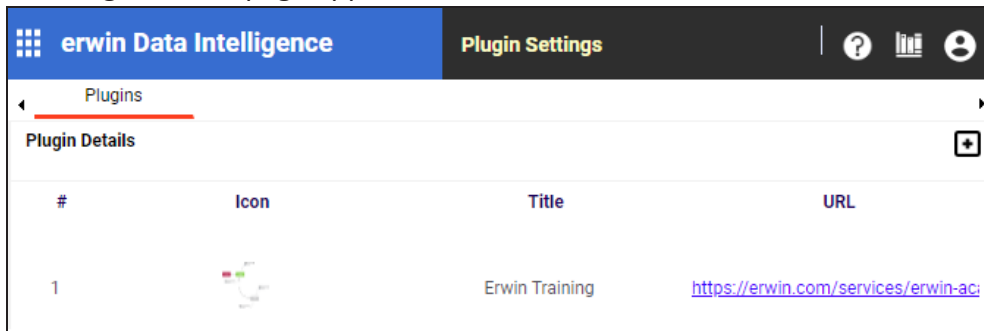
Configuring Plugins

The plugin framework allows you to organise and keep third party applications like automated testing framework, and Discovery BI module.

To configure plugins, follow these steps:

1. Go to **Application Menu > Settings > Plugins**.

The Plugin Details page appears.



2. To add plugins, click .

The Add Plugin page appears.

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

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

Configuring Plugins

Field Name	Description
	Choose Public to make it visible to all the users.
Plugin Title	Type a unique plugin title.
Plugin URL	Enter the plugin URL.
Plugin Icon	Use Choose File to browse and select the plugin icon image.
Plugin Description	Type a small plugin description.

4. Click .

The Plugin is added to the Plugin Details list.

Plugins						
Plugin Details						
Visibility	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Options	
Public	Administrator	2020-12-07 07:45:47.63	Administrator	2020-12-07 07:47:56.923		

Use the following options:

Edit

To edit plugin details, use .

Delete

To delete plugins, use .

Setting Miscellaneous Configurations

On the Miscellaneous Configurations page, you can set up different modules with respect to:

- [Email Settings](#): Under this, you can configure outbound email notifications to users. You can use SMTP server or configure different commands in the Linux environment to send outbound emails.
- [Notification](#): Under this, you can configure email notifications to users when Sensitive Data Indicator (SDI) classification task is complete.
- [Sensitivity Classification](#): Under this, you can configure sensitive data indicator classifications.
- [DQLabs Configuration](#): Under this, you can configure erwin Data Quality instance and schedule erwin Data Quality jobs.
- [Asset Settings](#): Under this, you can configure the appearance of Metadata Assets and Enterprise Tags on mind maps. You can also configure whether user assignment is enforced on Metadata Manager and Business Glossary Manager dashboards.
- [Workflow Settings](#): Under this, you can set the first stage applicable to all workflows and control the appearance of previous stages on the workflow screen.
- [Language Settings](#): Under this, you can configure UI field labels in different languages.
- [Version Retention](#): It enables you to retain archive versions of mappings and environments.
- [License Renewal Reminder](#): Under this, you can send license reminder emails to any concerned person and set the frequency of the reminders.
- [Form Validation Settings](#): It enables you to create and configure the forms for the Table Properties, Column Properties, and Environment Properties tabs in the Metadata Manager.
- [Data Lineage Settings](#): Under this, you can sync mapping records with lineage tables in case of any disruption.

Setting Miscellaneous Configurations

- [ALM Configuration](#): Under this, you can integrate HP ALM (Application Life Cycle Management), a third party tool with the Test Manager.
- [Menu Theme](#): Under this, you can configure menu theme of the application.
- [Security Setting](#): Under this, you can configure to be notified with a secure exit warning message.
- [Business Entity Types](#): Under this, you can configure background color, text color, and icon of business entities.
- [IDR Configuration](#): Under this, you can configure connection details and schedule jobs between erwin DI Cloud and on-premises instance.

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

The Miscellaneous Configurations page appears:

The screenshot shows the 'erwin Data Intelligence' interface with the 'Miscellaneous Configurations' page selected. The 'Email Settings' tab is active, showing various configuration options for email notifications. The page includes a header with the erwin logo and navigation tabs. The main content area contains several input fields and checkboxes for configuring email settings, including SMTP settings, authentication, and command-line options.

Configuration Option	Value / Status
Use SMTP Settings	☒
Admin Email Id*	
Admin Email SMTP Host*	
Admin Email Use SSL	☐ Note: default port - 465
Admin Email Use TLS	☐ Note: default port - 587
Admin Email SMTP Port*	587
Enable Authentication*	☐
Use sendmail Command	☐ ⓘ
Use mailx Command	☐ ⓘ
Use Custom Command	☐ ⓘ

Configuring Email Settings

You can configure Admin Email Id to send notifications to the users of erwin Data Intelligence (erwin DI). It involves using:

- SMTP settings
- sendmail command
- mailx command
- Custom Command

To configure email settings, follow these steps:

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

The Email Settings tab opens.

The screenshot shows the 'Email Settings' tab in the 'Miscellaneous Configurations' section. The 'Use SMTP Settings' option is selected. Below it, there are fields for 'Admin Email Id*', 'Admin Email SMTP Host*', 'Admin Email Use SSL' (checkbox), 'Admin Email Use TLS' (checkbox), and 'Admin Email SMTP Port*' (587). There are also notes for the SSL and TLS checkboxes: 'Note: default port - 465' and 'Note: default port - 587'. Below these, there are four radio button options: 'Use sendmail Command', 'Use mailx Command', and 'Use Custom Command', each with a 'Configure' button. The 'Enable Authentication*' checkbox is also present.

2. Click .
3. Use one of the following options:

Use SMTP Settings

You can use this option, if your organization is using SMTP server to send out-bound emails.

To configure the SMTP Settings, follow these steps:

Configuring Email Settings

1. Select **Use SMTP Settings**.
2. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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

Use sendmail Command

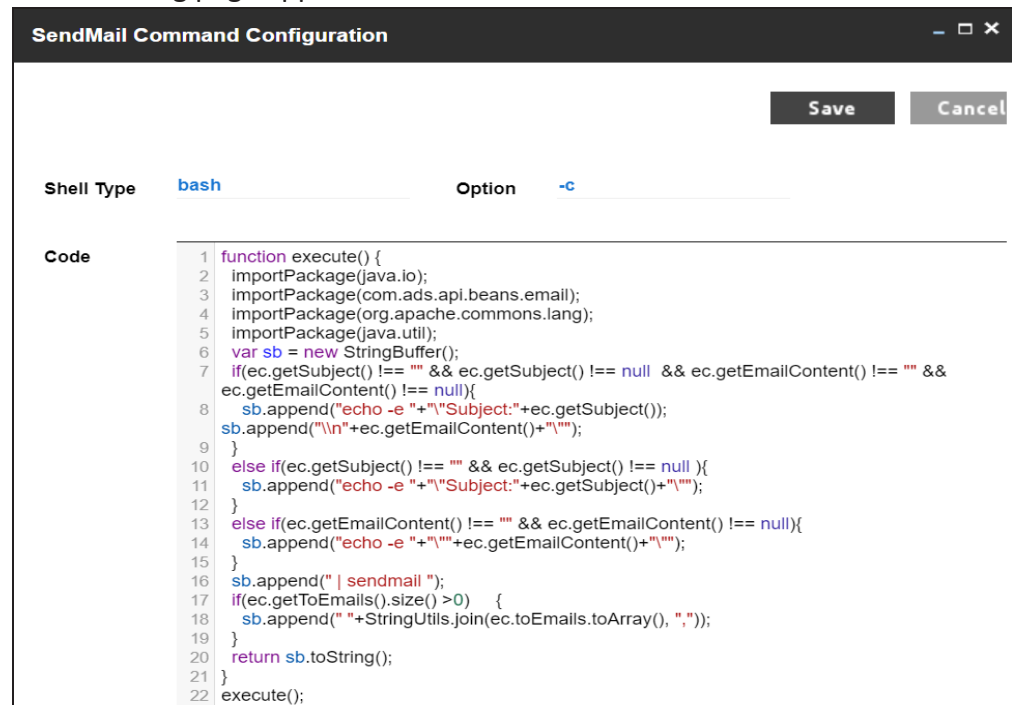
Configuring Email Settings

You can use this option, if you are using Linux environment and want to use sendmail command to send email notifications.

To configure the sendmail command, follow these steps:

1. Select **Use sendmail Command**.
2. Click **Configure**.

The following page appears:



3. Configure the sendmail command.
4. Click **Save**.

The sendmail command is configured.

Use mailx Command

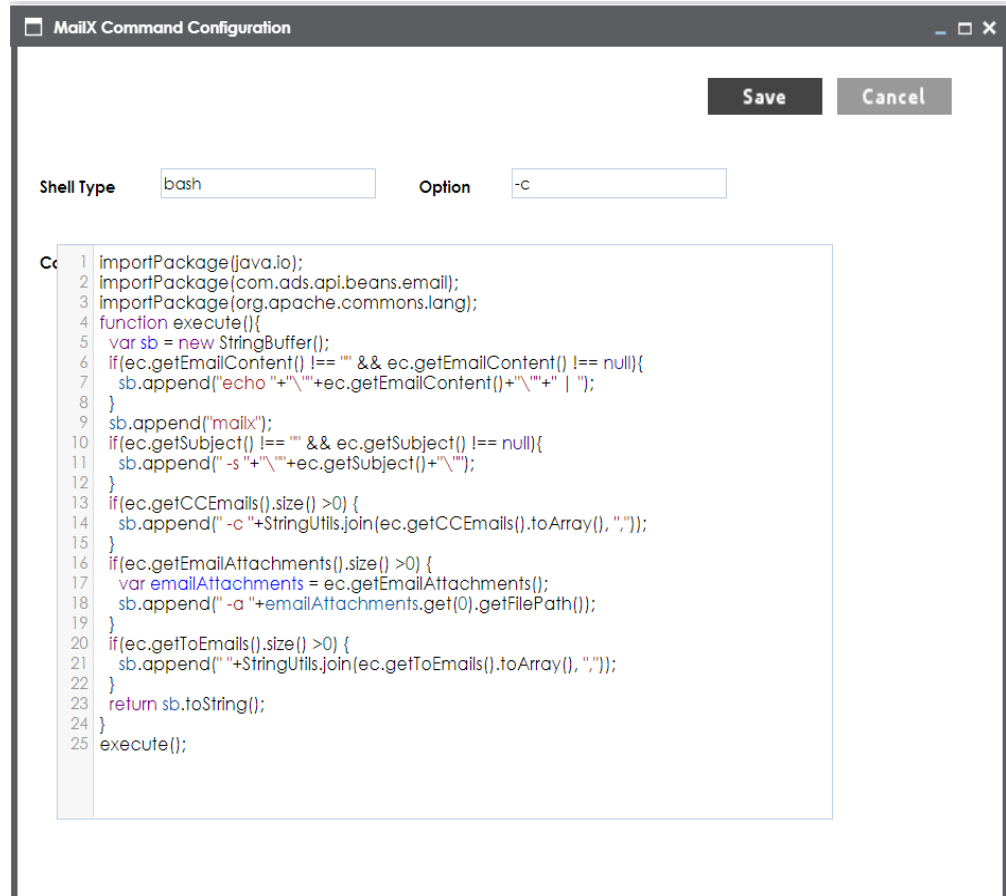
Use this option, if you are using Linux environment and want to use mailx command to send email notifications.

To configure the mailx command, follow these steps:

Configuring Email Settings

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

The MailX Command Configuration page appears.



The MailX Command Configuration dialog box is shown. It has a title bar with a close button and a maximize button. In the top right corner, there are 'Save' and 'Cancel' buttons. Below the title bar, there are two input fields: 'Shell Type' with the value 'bash' and 'Option' with the value '-C'. Below these fields is a large text area containing a Java code snippet. The code is as follows:

```
1 importPackage(java.io);
2 importPackage(com.ads.apl.beans.email);
3 importPackage(org.apache.commons.lang);
4 function execute(){
5     var sb = new StringBuffer();
6     if(ec.getEmailContent() != "" && ec.getEmailContent() != null){
7         sb.append("echo "+ec.getEmailContent()+"\n");
8     }
9     sb.append("mailx");
10    if(ec.getSubject() != "" && ec.getSubject() != null){
11        sb.append(" -s "+ec.getSubject()+"\n");
12    }
13    if(ec.getCCEmails().size() > 0) {
14        sb.append(" -c "+StringUtils.join(ec.getCCEmails().toArray(), ","));
15    }
16    if(ec.getEmailAttachments().size() > 0) {
17        var emailAttachments = ec.getEmailAttachments();
18        sb.append(" -a "+emailAttachments.get(0).getFilePath());
19    }
20    if(ec.getToEmails().size() > 0) {
21        sb.append(" "+StringUtils.join(ec.getToEmails().toArray(), ","));
22    }
23    return sb.toString();
24 }
25 execute();
```

3. Configure the mailx command.
4. Click **Save**.

The mailx command is configured.

Use Custom Command

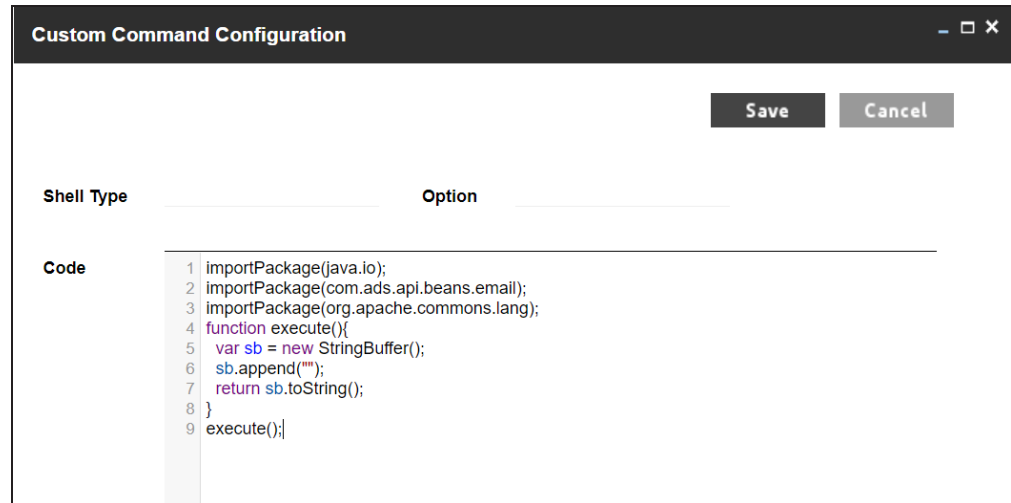
Use this option, if you are using Linux environment and want to use a custom command to send emails.

To configure a custom command, follow these steps:

Configuring Email Settings

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

The Custom Command Configuration page appears.



The screenshot shows a dialog box titled "Custom Command Configuration" with standard window controls (minimize, maximize, close) in the top right corner. In the top right of the dialog area, there are two buttons: "Save" and "Cancel". Below these buttons, there are two labels: "Shell Type" and "Option", each followed by a text input field. At the bottom of the dialog, there is a label "Code" followed by a text area containing the following Java code:

```
1 importPackage(java.io);
2 importPackage(com.ads.api.beans.email);
3 importPackage(org.apache.commons.lang);
4 function execute(){
5     var sb = new StringBuffer();
6     sb.append("");
7     return sb.toString();
8 }
9 execute();
```

3. Configure the custom command.
4. Click **Save**.

The custom command is configured.

4. Click .
5. Click  to test the email settings.

The Email Settings page appears.

Configuring Email Settings

Email Settings

From* abc@abc.com

To* abc@abc.com

Cc

Note* : Please provide CC List with comma(,) separated values

Subject

Email Body

Attachment(s) Drag-n-Drop files here or click to select files for upload.

Send **Cancel**

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

Field Name	Description
From	Type the Admin Email Id from which you wish to send email notifications.
To	Type a test email ID to which you want to send email.
CC	Type email IDs of secondary recipients.
Subject	Type the subject of the test email.
Email Body	Type the email body of the test email.
Attachment (s)	To attach files, drag and drop files or use  to browse and select files.

7. Click **Send**.

The success message validates your email settings.

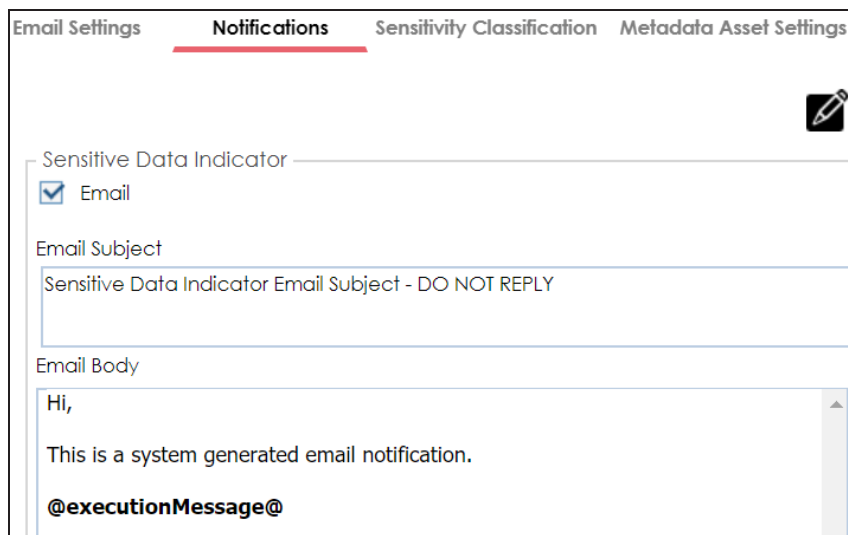
Configuring Sensitivity Update Notifications

You can configure email notifications to be sent whenever asset sensitivity is updated in bulk. These notifications are sent from the [administrator's email ID](#) when bulk sensitivity update is complete.

To configure sensitivity update notifications, follow these steps:

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

The following page appears.



The screenshot shows the 'Notifications' tab selected in the 'Miscellaneous Configurations' section. The 'Sensitive Data Indicator' section has the 'Email' checkbox checked. The 'Email Subject' field contains the text 'Sensitive Data Indicator Email Subject - DO NOT REPLY'. The 'Email Body' field contains the text 'Hi, This is a system generated email notification. @executionMessage@'. A pencil icon is visible in the top right corner of the configuration area.

2. Click .
3. Use the following options:

Email

Select the check box to turn on email notifications to users when they update asset sensitivity in bulk.

Email Subject

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

Email Body

You can edit the default email content and add custom content.

Configuring Sensitivity Update Notifications

4. Click .

The sensitivity update notifications are configured.

Configuring Sensitivity Classifications

You can configure sensitive data indicator (SDI) classifications to classify sensitivity of:

- Columns
- Tables
- Environments
- Systems
- Business terms
- Business rules
- Business policies
- Other business assets
- Data Marketplace assets

To configure sensitive data indicator classifications, follow these steps:

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

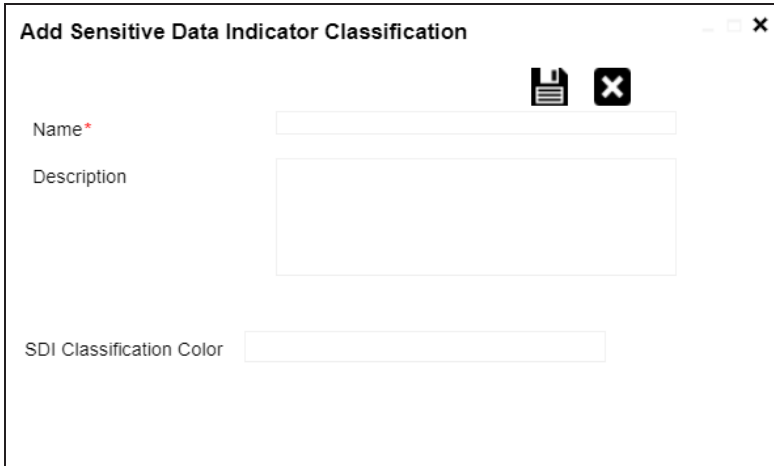
The Sensitive data indicator Classification page appears.

Sensitive data indicator Classification				
#	SDI Class	SDI Class Description	Color	Created By
1	Confidential	Confidential		System
2	PHI	Protected Health Information		Administrator
3	PII	Personally Identifiable Information		System
4	Public	Public		System
5	Restricted	Restricted		System

Configuring Sensitivity Classifications

2. Click .

The Add Sensitive Data Indicator Classification page appears.



Add Sensitive Data Indicator Classification

Name*

Description

SDI Classification Color

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

For example:

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

4. Click .

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

Configuring Sensitivity Classifications

Email Settings Notifications <u>Sensitivity Classification</u> DQLabs Configuration Scheduled Jobs				
Sensitive data indicator Classification				
#	SDI Class	SDI Class Description	Color	Created By
1	Confidential	Confidential		System
2	PHI	Protected Health Information		Administrator
3	PII	Personally Identifiable Information		System
4	Public	Public		System
5	Restricted	Restricted		System
6	Secret	Protected Mark Information		System

Use the following options:

Edit ()

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

Delete ()

Use this option to delete the SDI classification.

Configuring Data Profiling

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

Configuring erwin Data Quality in erwin DI requires Client ID and Client Secret details available in your erwin Data Quality instance. To get configuration details from erwin Data Quality instance, refer to the [Accessing erwin Data Quality Configuration Details](#) section.

erwin Data Quality now supports Single Sign-On (SSO). For more information, refer to [erwin Data Quality SSO guide](#).

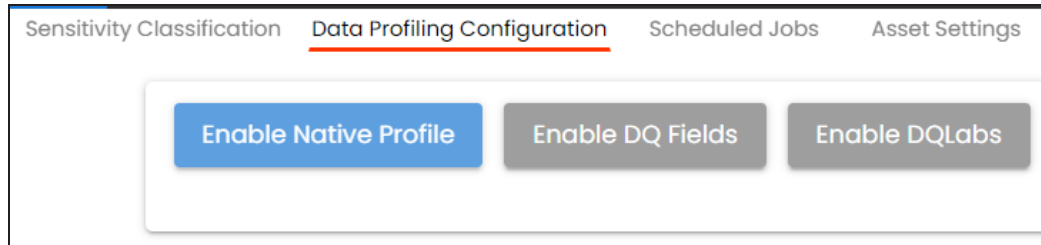
To configure erwin Data Quality, follow these steps:

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

The Miscellaneous Configuration page appears.

2. Click the **Data Profiling Configuration** tab.

The Data Profiling Configuration tab appears.



Use the following options for setting up data profiling configuration:

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

Enabling DQLabs

To enable erwin Data Quality integration, follow these steps:

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

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



This configuration requires Client ID and Client Secret from your erwin Data Quality instance. To get configuration details from erwin Data Quality instance, refer to the [Accessing erwin Data Quality Configuration Details](#) section.

Enable Native Profile

Enable DQ Fields

Enable DQLabs

History

Test

Save

Cancel

Connection Details

Base URL(Private)

Public URL

Client Id

Client Secret

☐ Harvest SDI Classification ☒ Enable DQ For Smart Connector

Organization Name

Configuring Data Profiling

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

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

4. Click  **Save**.

The erwin Data Quality configuration is saved.

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

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

The next steps involve adding datasets in the erwin Data Quality and then, [scheduling an erwin Data Quality job](#).

1. Log in to erwin Data Quality.
Your erwin Data Quality instance opens.
2. On the app menu, click  > **Setting** > **Organization** tab.
3. Click **Edit**, then go to **Systems** tab and expand **Api** section.
The Api section displays the Client ID and Client Secret.

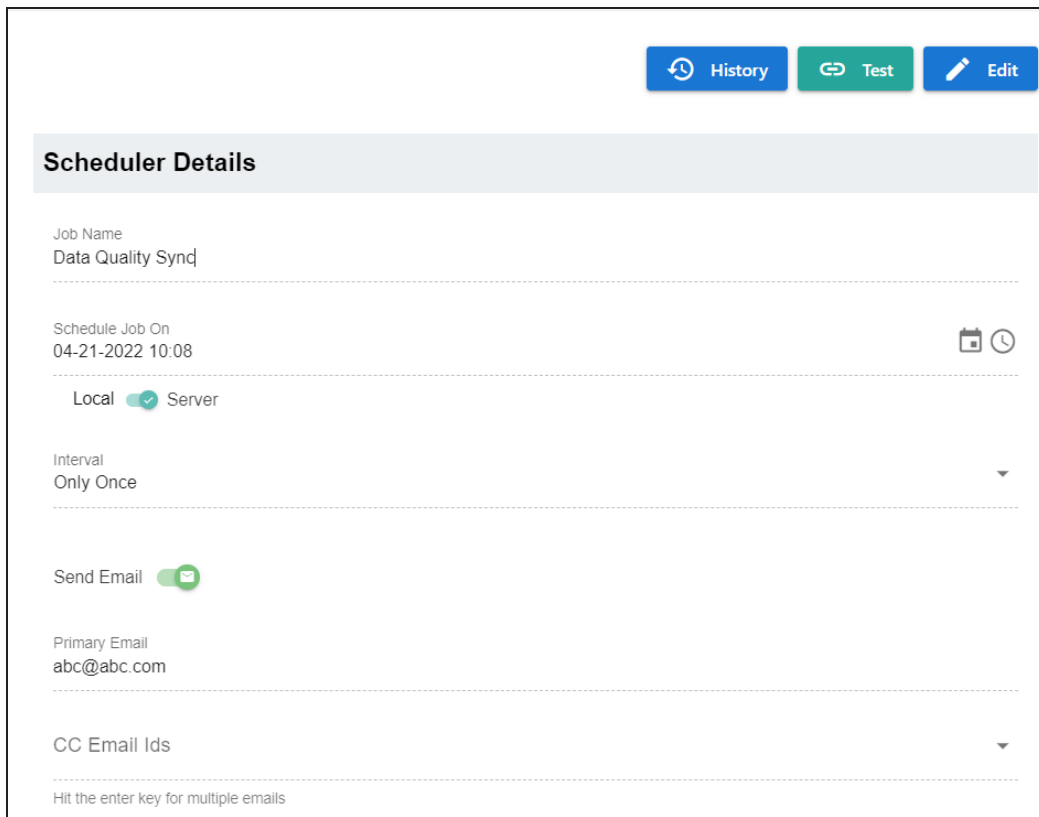
4. Hover over the values and click  to copy them, and paste them into erwin DI's [erwin Data Quality Configuration](#) section.

Scheduling erwin Data Quality Jobs

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

To schedule erwin Data Quality jobs, follow these steps:

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



The screenshot shows the 'Scheduler Details' configuration form. At the top right, there are three buttons: 'History' (with a circular arrow icon), 'Test' (with a play icon), and 'Edit' (with a pencil icon). The form itself has a title bar 'Scheduler Details'. Below this, the 'Job Name' is 'Data Quality Synd'. The 'Schedule Job On' field shows '04-21-2022 10:08' with a calendar and clock icon. The 'Local' radio button is selected over the 'Server' option. The 'Interval' is set to 'Only Once' with a dropdown arrow. The 'Send Email' toggle is turned on. The 'Primary Email' is 'abc@abc.com'. The 'CC Email Ids' field has a dropdown arrow and a hint 'Hit the enter key for multiple emails'.

2. Click  **Edit**.
The Data Profiling Configuration tab switches to edit mode.

Scheduling erwin Data Quality Jobs

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

Field Name	Description
Job Name	Specifies the job name. This field autopopulates with a read-only job name.
Schedule Job On	Specifies the date and time of the job. Use  to select a date, and  to select a time. For example, 11-01-2021 16:41.
Local or Server	Specifies whether the job uses local or server time. • Local: Indicates that the job refers to the local machine • Server: Indicates that the job refers to the machine where your application is deployed
Interval	Specifies the frequency of the job. • Once: Indicates that the job runs only once • Every Day: Indicates that the job runs every day • Every Week: Indicates that the job runs every week • Every Month: Indicates that the job runs every month
Send Email	Switch Send Email to ON to receive a job notification.
Primary Email	This field is autopopulated with your email ID. You receive email notifications about the scheduled job from the administrator's email ID. For example, Chris.Duck@erwin.com
CC List	Specifies a list of email IDs that should receive email notifications about the scheduled job. Hit enter after each to add multiple email IDs. For example, Christopher.Lewis@erwin.com, Amy.Ivan@erwin.com

4. Click **Schedule**.

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

Scheduling erwin Data Quality Jobs

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

Activity Log				
#	Type	Details	Date	User
2		Status : Success	10/29/2021 06:44:00	Administrator
		Message : Get Score Successfully		
		Environment : Quest_Warehouse		
		System : SQL System		
1		Status : Success	10/29/2021 06:37:00	Administrator
		Message : Get Score Successfully		
		Environment : Quest_Warehouse		
		System : SQL System		

Configuring Scheduled Jobs

This tab allows you to configure scheduled metadata scan for an environment whose schema was selected or it was scanned at least once. In this screen, you can view scheduled job name, job type, objects, previous and next fire time, job state, and other creation details. Also, you can delete scheduled jobs.

To delete scheduled jobs, follow these steps:

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

The following page appears.

Scheduled Job Details					
#	Job Name	Job Type	Previous Fire Time	Next Fire Time	Job State
1	Compliance Reports Default job			21-12-2022 02:30:00	NORMAL
2	Administrator1584599690463	Metadata Scan	20-12-2022 13:08:42	21-12-2022 07:34:00	NORMAL
3	Discover Assets Data Syncing		20-12-2022 13:44:00	20-12-2022 14:44:00	NORMAL
4	Administrator1588686769527	Metadata Scan	20-12-2022 13:57:00	21-12-2022 13:57:00	NORMAL

2. Click .

The scheduled job is deleted.

Configuring Asset Settings

You can configure the appearance of Metadata Assets and Enterprise Tags on mind maps with respect to the display color and label. You can also configure whether Metadata Manager and Business Glossary Manager dashboard display derived from all assets or only those that are assigned to you.

To configure asset settings, follow these steps:

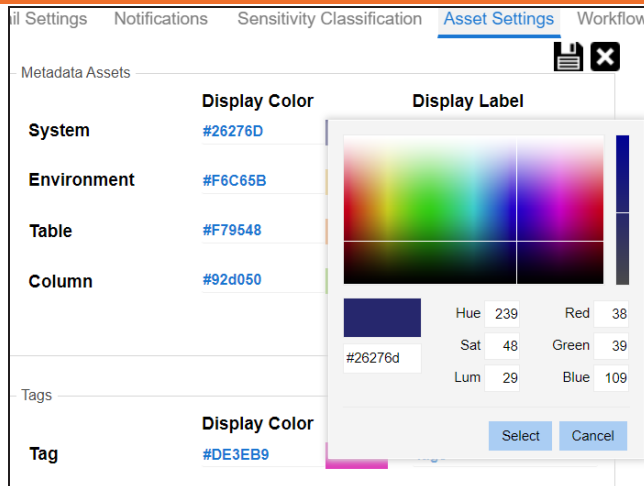
1. Go to **Application Menu > Settings > Miscellaneous Configurations > Asset Settings**.

The following page appears.

Sensitivity Classification <u>Asset Settings</u> Workflow Settings Language Settings			
Metadata Assets			
System	Display Color	Display Label	
	#26276D		System
Environment	#F6C65B		Environment
Table	#F79548		Tables
Column	#92d050		Columns
Tags			
Tag	Display Color	Display Label	
	#DE3EB9		Tags
Dashboards			
Enforce User Assignment In Metadata Manager			☐ OFF
Enforce User Assignment In Business Glossary Manager			☐ OFF

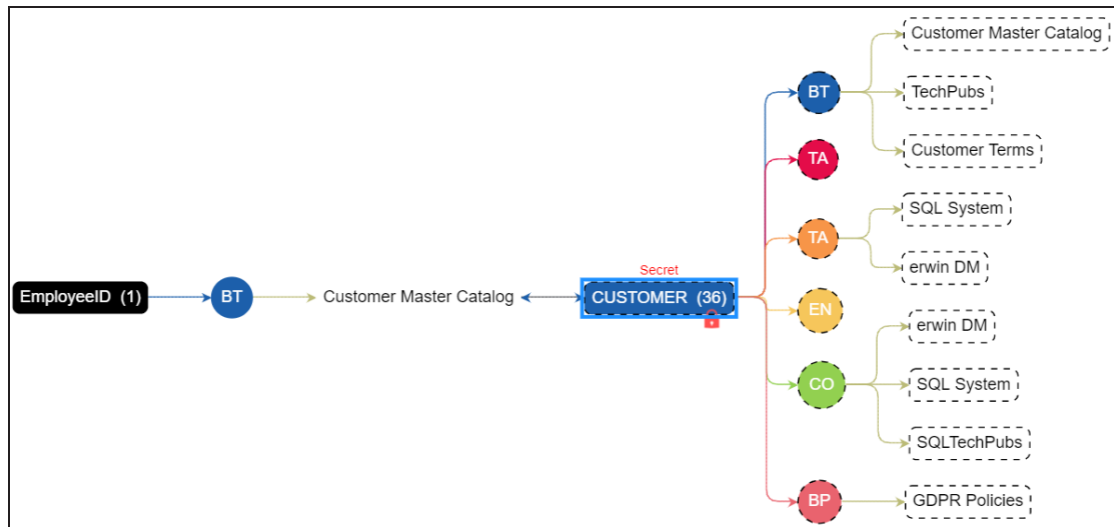
2. Click .
3. Under the Metadata Assets and Tags section, click the required display color box. Then select a color on the color card and click **Select**.

Configuring Asset Settings



- Next, under the Metadata Assets and Tags section, click the required display label box. Then, enter a label.
- Click .

Metadata assets and tags appear in the mind map in selected colors and with configured display labels.



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

Configuring Asset Settings

- **Enforce User Assignment in Metadata Manager:**
Switch **Enforce User Assignment in Metadata Manager** to **ON** to derive data information based on your assignments of technical assets and display it on Metadata Manager Dashboard.
- **Enforce User Assignment in Business Glossary Manager:**
Switch **Enforce User Assignment in Business Glossary Manager** to **ON** to derive data information based on your assignments of business assets and display it on Business Glossary Dashboard.

Configuring Version Retention

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

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

To configure version retention for mappings, follow these steps:

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

The following page appears.

The screenshot shows the 'Version Retention' configuration page for 'Mappings'. The page has a top navigation bar with links: 'ion', 'Data Profiling Configuration', 'Scheduled Jobs', 'Asset Settings', 'Version Retention' (highlighted with a red underline), 'Workflow Settings', and 'Lan'. Below the navigation bar, there are two tabs: 'Mappings' (active, underlined) and 'Metadata'. On the right side, there are three buttons: 'History' (with a circular arrow icon), 'Edit' (with a pencil icon), and a settings gear icon. The main content area contains two configuration fields: '# Of Archived Versions To Retain' with a value of '2', and 'Retention period (in months)' with a value of '18'. Each field has a red 'Note*' below it. The first note states: 'The above number of archived versions will be maintained at any point of time for all maps. All older versions will be automatically deleted.' The second note states: 'Any archived data older than the specified period will be automatically deleted as per the specified schedule.' At the bottom, there is a red triangle icon followed by an 'Important Note*': 'All published maps (archived versions only) that meet the deletion criteria will be permanently deleted.'

2. Under Mappings, click .

The page switches to edit mode.

Configuring Version Retention

Data Profiling Configuration Scheduled Jobs Asset Settings **Version Retention** Workflow Settings Language

Mappings Metadata

History Save Cancel ⚙️

Of Archived Versions To Retain
2

Note*: The above number of archived versions will be maintained at any point of time for all maps. All older versions will be automatically deleted.

Retention period (in months)
18

Note*: Any archived data older than the specified period will be automatically deleted as per the specified schedule.

Important Note*:
All published maps (archived versions only) that meet the deletion criteria will be permanently deleted.

- Use the following options to archive and retain the mapping:

Of Archived Versions To Retain

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



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

Retention period (in months)

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



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

- Click **Save**.

The version retention is configured for mappings.

To view activity logs related to the retained archived versions, click  **History**. Additionally, use  to [schedule clean up jobs](#) for archived mappings and set [history retention period \(in months\)](#).

Scheduling Clean up Jobs

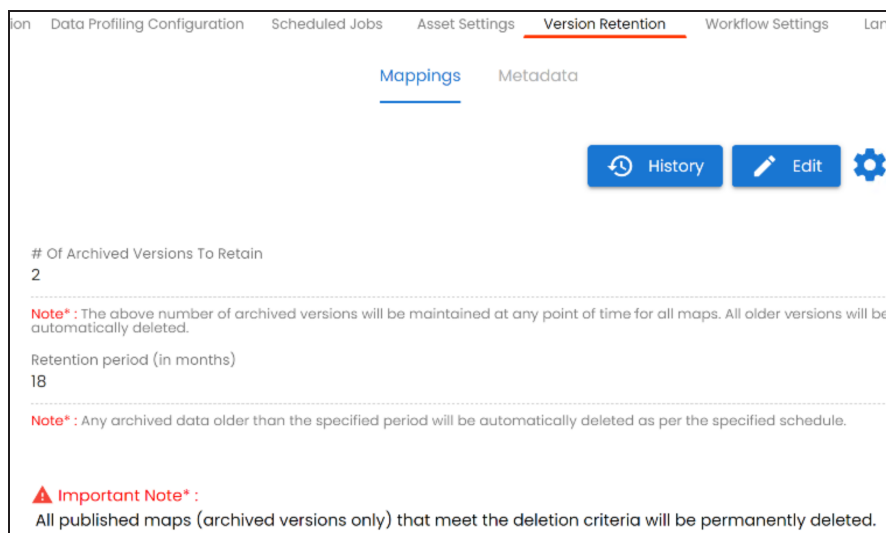
You can now schedule a job to clean up archived mappings and environments.

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

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

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

The following page appears.



The screenshot shows the 'Version Retention' configuration page for 'Mappings'. The page has a top navigation bar with tabs: 'Data Profiling Configuration', 'Scheduled Jobs', 'Asset Settings', 'Version Retention' (active), 'Workflow Settings', and 'Lan'. Below the navigation bar, there are two tabs: 'Mappings' (active) and 'Metadata'. On the right side, there are two buttons: 'History' and 'Edit', followed by a gear icon. The main content area contains the following fields and notes:

- # Of Archived Versions To Retain: 2
- Note***: The above number of archived versions will be maintained at any point of time for all maps. All older versions will be automatically deleted.
- Retention period (in months): 18
- Note***: Any archived data older than the specified period will be automatically deleted as per the specified schedule.
- Important Note***: All published maps (archived versions only) that meet the deletion criteria will be permanently deleted.

2. Under Mappings, click .
3. Click **Schedule**.

The following page appears.

Scheduling Clean up Jobs

Job Scheduler

×

Job Name

Archive Map Cleanup

Schedule Job On

08-01-2024 12:46:22



Local

☒

Server

Interval

Only Once

▼

Send Email

☒



Email Id

abc@abc.com

CC Email Id(s)

▼

Hit the enter key for multiple email(s)

SUBMIT

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

Field Name	Description
Job Name	Specifies the job name. This field auto-populates with a read-only job name.
Schedule Job On	Specifies the date and time of the job. Use  to select a date and  to select a time. For example, 08-01-2024 12:46:22.
Local or	Specifies whether the job uses local or server time.

Scheduling Clean up Jobs

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

5. Click **Submit**.

The archive map cleanup job is scheduled.

Setting History Retention Period (in months)

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

To set a history retention period, follow these steps:

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

The following page appears.

ion Data Profiling Configuration Scheduled Jobs Asset Settings **Version Retention** Workflow Settings Lar

Mappings Metadata

History Edit

Of Archived Versions To Retain
2

Note*: The above number of archived versions will be maintained at any point of time for all maps. All older versions will be automatically deleted.

Retention period (in months)
18

Note*: Any archived data older than the specified period will be automatically deleted as per the specified schedule.

Important Note*:
All published maps (archived versions only) that meet the deletion criteria will be permanently deleted.

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

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



Configuring Workflow Settings

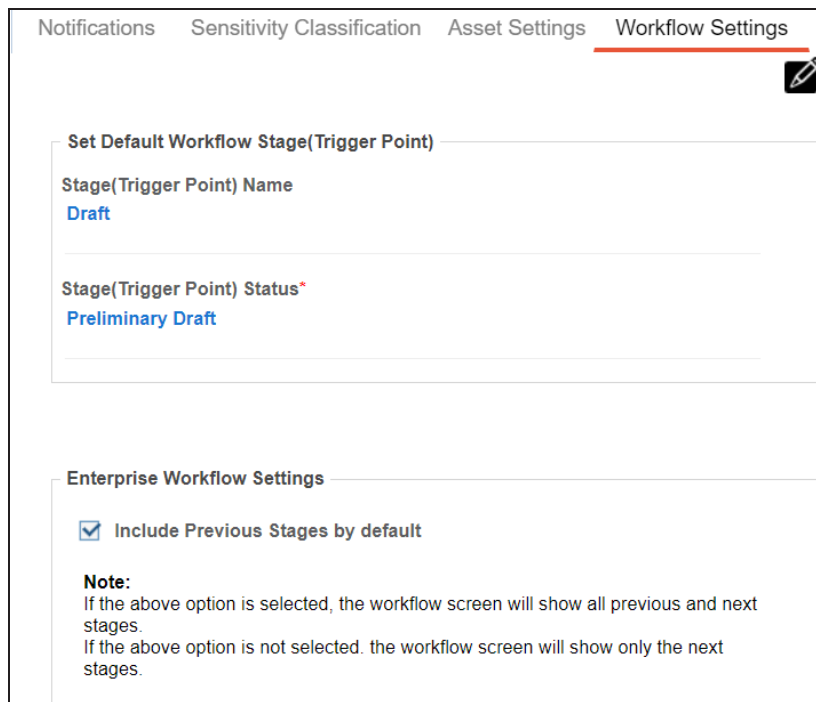
You can configure the following on the Workflow Settings tab:

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

To configure workflow settings, follow these steps:

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

The following page appears.



The screenshot shows the 'Workflow Settings' tab in a configuration interface. At the top, there are four tabs: 'Notifications', 'Sensitivity Classification', 'Asset Settings', and 'Workflow Settings', with the latter being selected and underlined. To the right of the tabs is a pencil icon. Below the tabs, there are two main sections. The first section is titled 'Set Default Workflow Stage(Trigger Point)'. It contains two input fields: 'Stage(Trigger Point) Name' with the value 'Draft' and 'Stage(Trigger Point) Status*' with the value 'Preliminary Draft'. The second section is titled 'Enterprise Workflow Settings'. It contains a checkbox labeled 'Include Previous Stages by default' which is checked. Below this checkbox is a 'Note:' section with two lines of text: 'If the above option is selected, the workflow screen will show all previous and next stages.' and 'If the above option is not selected, the workflow screen will show only the next stages.'

2. Click .
3. Use the following sections:

Set Default Workflow Stage(Trigger Point)

Configuring Workflow Settings

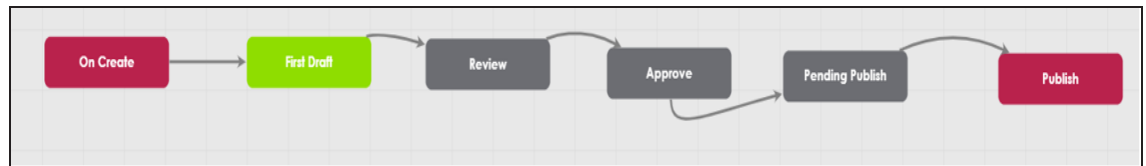
Use this section to configure a default first stage of workflows. This stage is applicable to all workflows. By default, both, the stage name and status, are set to Draft.

To set the default first stage, use the following options:

Stage(Trigger Point) Name

You can edit the first stage's name. This name is applicable to all workflows.

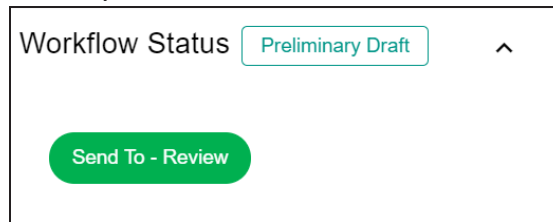
For example, the following image displays the first stage as First Draft.



Stage(Trigger Point) Status

You can edit the status that is displayed for the first stage. This status is applicable to all workflows.

For example, the following image displays the status of First Draft as Preliminary Draft for a business term.



Enterprise Workflow Settings

Use this section to control the appearance of previous workflow stages on the workflow screen.

To include previous workflow stages, select the **Include Previous Stages by default** check box.

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

Configuring Workflow Settings

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

4. Click .

Workflow settings are configured.

Configuring Language Settings

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

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

To use the application in any of these languages, configure user-based language preference in the Resource Manager. For more information, refer to the [Creating Users and Assigning Roles](#) topic.

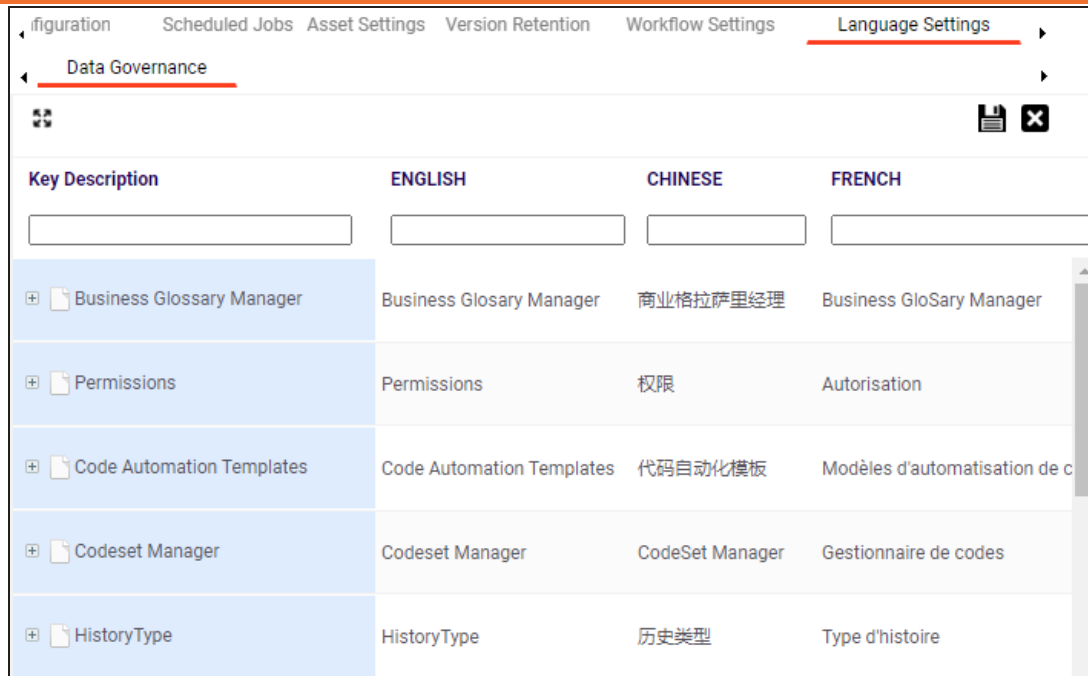
Starting erwin DI v14.0, language settings for supported languages are pre-configured. However, you can edit or configure your own language settings for UI labels.

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

1. Go to **Application Menu > Settings > Miscellaneous Configurations > Language Settings**.

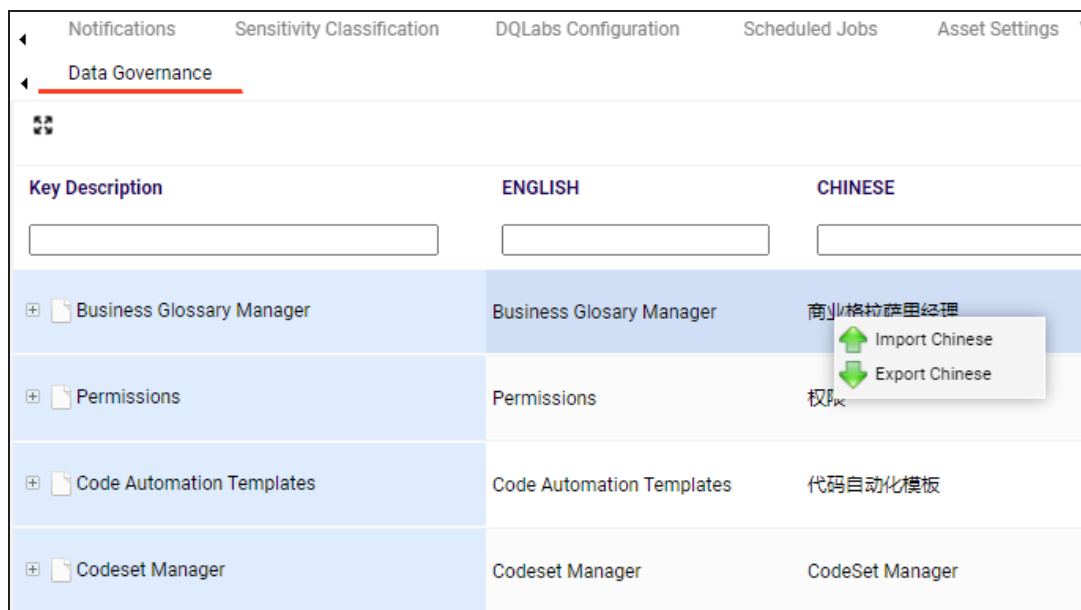
The following page appears. The keys are organized in a tree structure in the Key Description pane to help identify the location of the UI label in the application. By default, English UI labels are provided in the English column.

Configuring Language Settings



Key Description	ENGLISH	CHINESE	FRENCH
Business Glossary Manager	Business Glossary Manager	商业格拉萨里经理	Business GloSary Manager
Permissions	Permissions	权限	Autorisation
Code Automation Templates	Code Automation Templates	代码自动化模板	Modèles d'automatisation de c
Codeset Manager	Codeset Manager	CodeSet Manager	Gestionnaire de codes
HistoryType	HistoryType	历史类型	Type d'histoire

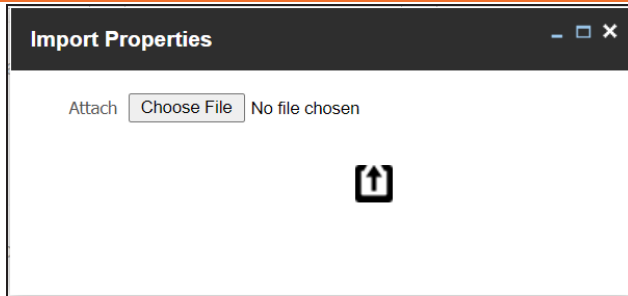
2. To upload UI labels in a required language, right-click a cell under the language column and click **Import <Language>**.



Key Description	ENGLISH	CHINESE
Business Glossary Manager	Business Glosary Manager	商业格拉萨里经理
Permissions	Permissions	权限
Code Automation Templates	Code Automation Templates	代码自动化模板
Codeset Manager	Codeset Manager	CodeSet Manager

The Import Properties page appears.

Configuring Language Settings



3. Click **Choose File** and select a language property file.

4. Click .

UI labels are uploaded in the language column.

5. Click .

You can also export a property file for a language.

To edit a UI label, follow these steps:

1. Use  to expand the key description tree.
2. Double-click the corresponding cell and type the required UI label.
3. Click .



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

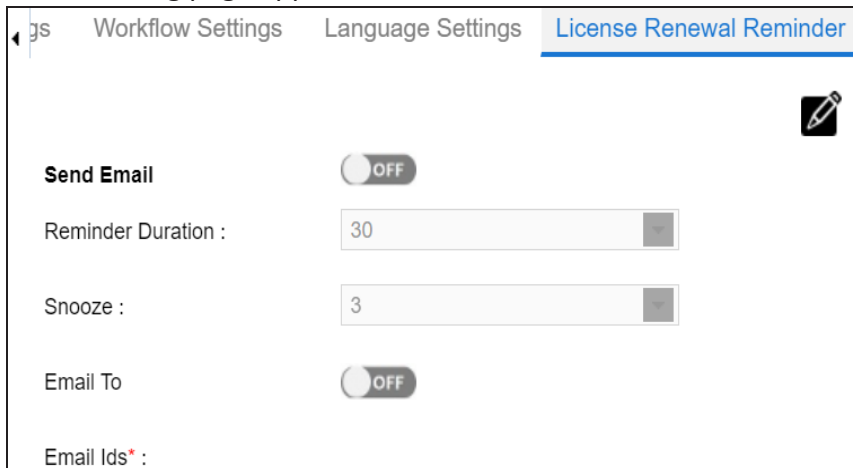
Configuring License Renewal Reminders

You can send license renewal reminders to a list of recipients from the administrator's email ID. You can also configure reminder time frames and snooze time in days.

To configure license renewal reminders, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous Configurations > License Renewal Reminder**.

The following page appears.



2. Click .
3. Use the following options to set reminders:

Send Email

Switch **Send Email** to **ON** to enable reminder emails.

Reminder Duration

You can select the reminder duration in days. For example, if you select 30, the reminder emails are sent thirty days prior to the license expiry.

Snooze

You can select the snooze time in days. For example, if you select 3, the reminder emails are sent daily, starting three days prior to the license expiry.

Email To

Configuring License Renewal Reminders

Switch **Email To** to **ON** to enable Email Ids box.

Email Ids

Enter the email IDs of users, who should receive the reminder emails.

4. Click .

License renewal reminders are configured.

Configuring Form Validation Settings

You can create and configure three different form types of the Metadata Manager:

- **Table Properties:** The form would be applicable to the Table Properties tab of a table.
- **Column Properties:** The form would be applicable to the Column Properties tab of a column.
- **Environment Properties:** The form would be applicable to the Environment Properties tab of an environment.

To create forms, follow these steps:

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

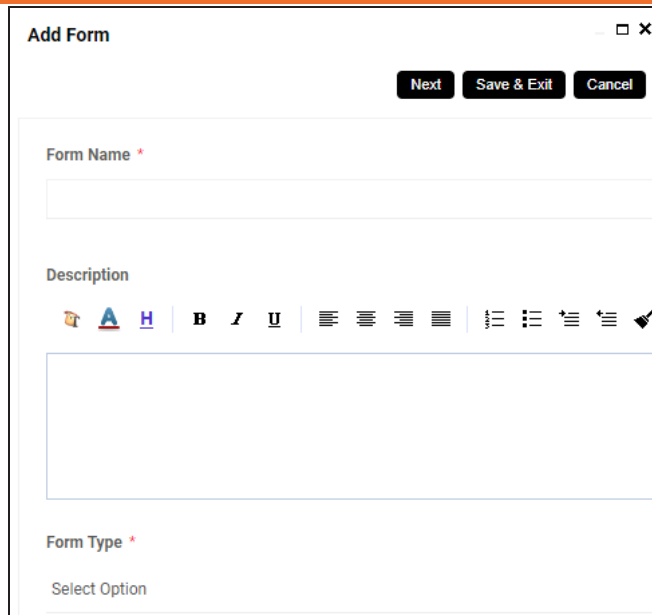
The following page appears.

Settings Language Settings License Renewal Reminder <u>Form Validation Settings</u> Data Lineage S					
#	Name	Description	Associate Objects	Base Form	Options
1	Table Properties - Metadata	Default template to configure table field properties			
2	Column Properties - Metadata	Default template to configure column field property			
3	Environment Properties - Metadata	Default template to configure environment field property			

2. Click

The Add Form page appears.

Configuring Form Validation Settings



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

Field Name	Description
Form Name	Specifies the unique name of the form. For example, Adventureworks Metadata.
Description	Specifies the description about the form. For example: The form is to validate metadata in the Adventureworks environment.
Form Type	Specifies the type of the form. For example, Table Properties - Metadata Manager.

4. Click **Save & Exit**.

The form is created and saved in the form list.

Once a form is created, you can:

- [Configure form fields](#)
- [Associate the form with systems and environments](#)
- [Manage the form](#)

Configuring Form Fields

You can configure form fields and change its properties by:

- Making them mandatory
- Setting their default value
- Setting their regular expression
- Setting their order
- Making them visible

To configure form fields, follow these steps:

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

The following page appears.

Settings Language Settings License Renewal Reminder <u>Form Validation Settings</u> Data Lineage S					
#	Name	Description	Associate Objects	Base Form	Options
1	Table Properties - Metadata	Default template to configure table field properties			
2	Column Properties - Metadata	Default template to configure column field property			
3	Environment Properties - Metadata	Default template to configure environment field property			

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

The Configure Form Fields page appears.

Configuring Form Fields

Field Name	Property	Value
Associated Business Term	Mandatory	OFF
	Default value	
	Regular Expression	
	Order	6
	Visibility	ON

Note*: This is a system field whose properties cannot be modified.

3. Select the required <Field_Name> under the **Field Name** column.

4. Use the following options to change the properties of the field:

Mandatory

To make the selected field mandatory, switch **Mandatory** to **ON**.

Default Value

To set a default value for the selected field, type the default value.

Regular Expression

To set a regular expression for the selected field, type expressions inside the square brackets.

For example, [abc] denotes a, b, or c.

Order

To set the order of the selected field, type the order.

For example, 6. Order of a finite field is the number of elements it contains.

Visibility

To make the field visible, switch **Visibility** to **ON**.

5. Click **Save & Exit**.

The selected field is configured.

Associating Forms

Association of a form depends on the type of the form. You can associate forms in the following manner:

Form Type	Association
Table Properties	You can associate it to multiple environments or Systems. If the form is associated with a system then it is applicable to all the environments under the system.
Column Properties	You can associate it to multiple environments or systems. If the form is associated with a system then it is applicable to all the environments under the system.
Environment Properties	You can associate it to multiple systems.

To associate forms, follow these steps:

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

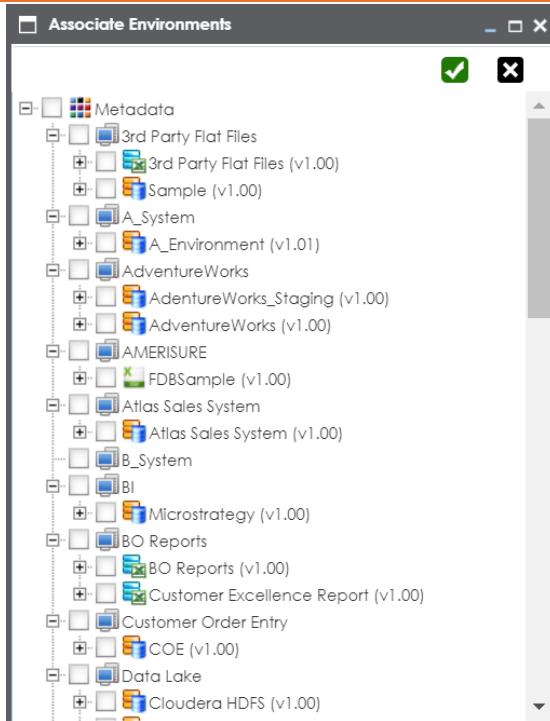
The following page appears.

Settings Language Settings License Renewal Reminder Form Validation Settings Data Lineage S					
#	Name	Description	Associate Objects	Base Form	Options
1	Table Properties - Metadata	Default template to configure table field properties			
2	Column Properties - Metadata	Default template to configure column field properties			
3	Environment Properties - Metadata	Default template to configure environment field properties			

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

The Associate Environments page appears.

Associating Forms



3. Select the systems or environments, and click .

The form is associated.

Managing Forms

Managing forms involves:

- Editing Forms
- Deleting Forms
- Viewing Activity Logs

To manage forms, follow these steps:

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

The following page appears.

Settings

Language Settings

License Renewal Reminder

Form Validation Settings

Data Lineage S

+

#	Name	Description	Associate Objects	Base Form	Options
1	Table Properties - Metadata	Default template to configure table field properties			
2	Column Properties - Metadata	Default template to configure column field property			
3	Environment Properties - Metadata	Default template to configure environment field property			

2. Use the following options to manage forms:

Edit

To edit forms, click .

Edit Form

Save & Exit Cancel

Form Name *

Form_Name

Description



This form is for column properties in erwinDIS.

Form Type *

Column Properties - Metadata Manager

Delete (✕)

To delete forms, click ✕.

History (🔄)

To view the activity log of the forms, click 🔄.

Data Lineage Settings

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

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

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

The following page appears.

Sync Type	Last Synced by User	Last Synced D
Add New	Administrator	20-05-2020

2. Use the following options:

Add New

Use this option to load only new mapping records that have been added to mapping specification table since the last sync.

Delete & Reload

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

Statistics

This section displays statistical information about lineage sync.

Lineage Sync History Log

This section displays the lineage sync activity log.

Links Threshold

Lineage appears in two views, graphical and grid. Under the Links Threshold section, you can set the threshold value of connected links such that if number of connected links exceeds this value, lineage is not rendered in the graphical view. You can also control whether Overview Lineage is enabled for lineage reports.

To configure links threshold and overview lineage, follow these steps:

1. Under the Links Threshold section, click .
2. Use the following options:

Number of Connected Links

Use this option to set the threshold value for connected links such that if number of connected links exceed this value, then lineage is not rendered in the graphical view. By default, this value is set at 3000.

Overview Lineage

Use this option to control lineage visibility (overview or expanded technical) for lineage reports. By default this option is enabled.

3. Click .

The links threshold and overview lineage are configured.

Configuring HP ALM

HP Application Life Cycle Management (ALM) is a third party tool to manage test cases. You can configure connection details and integrate the test cases created in HP ALM with the Test Manager.

To configure HP ALM, follow these steps:

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

The following page appears.

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

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

Configuring HP ALM

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

4. Click  to test the connection.

If the connection is established then a success message is displayed.

5. Click .

The HP ALM is integrated with the Test Manager.

Configuring Menu Theme

By default, a menu theme is available for erwin Data Intelligence (erwin DI). You can also configure menu theme and select different colors and logo to personalize the application menu, navigation pane, and log in page.

To configure menu theme, follow these steps:

1. Go to **Application Menu > Settings > Miscellaneous Configurations > Menu Theme**.

The following page appears.

The screenshot shows the 'Login Screen and Theme Configuration' interface. It includes a title bar with 'Login Screen and Theme Configuration' and 'EDIT' and 'SAVE' buttons. The main content area is divided into two columns. The left column contains: a 'Default Menu theme' toggle switch (currently on), an 'Instance Name' text field, 'Primary Theme Color' and 'Secondary Theme Color' pickers with hex codes #5c5d61 and #e9636e, an 'Enable Client Logo' toggle switch (currently off) with a 'No Image Found' placeholder and an 'Upload Client Logo' button, and a 'Hide disabled modules from end user view' toggle switch (currently off). The right column contains: an 'Enable Login Screen Text' toggle switch (currently off), 'Header', 'Body', and 'Footer' text areas, a 'Login Screen Text Color' picker with hex code #ffffff, an 'Enable Default Background' toggle switch (currently off) with a preview image, and an 'Upload Login Image' button.

2. Click **Edit**.
3. Switch the **Default Menu theme** option off.
4. Use the following options:

Default Menu Theme

Use this option to switch between default theme and custom menu themes. You can select theme colors for a custom menu theme whereas the default menu theme has the following colors:

Configuring Menu Theme

- **Primary Theme Color:** #131413
- **Secondary Theme Color:** #505670

Instance Name

Use this option to customize a name for your application instance. The instance name appears on the navigation pane.

For example, the following theme displays the name of the instance as erwin DI v14.0.

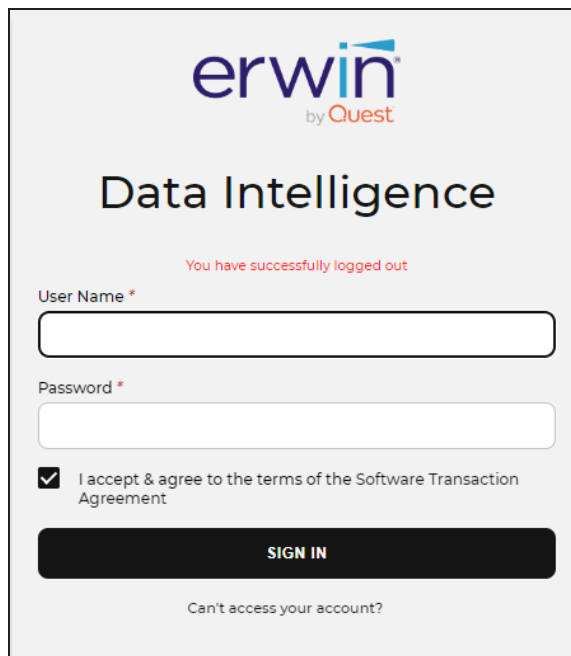
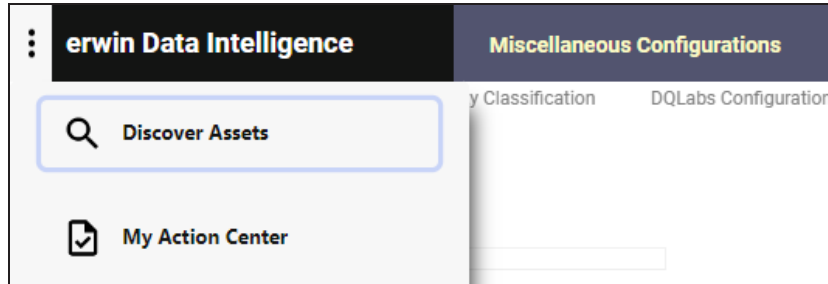
Primary Theme Color

You can use this option only when Default Menu Theme is switched to . Use this option to configure the theme color of the application menu, instance name, and log in page.

Configuring Menu Theme

To configure **Primary Theme Color**, click  and select a color from the color palette.

For example, the following theme for the application menu, instance name, and log in page is set to grey color.



Secondary Theme Color

You can use this option only when Default Menu Theme is switched to . Use this option to configure the theme color of the navigation pane.

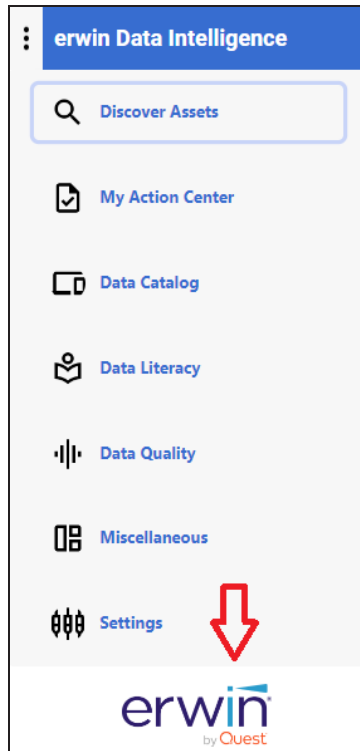
To configure **Secondary Theme Color**, click  and select a color from the color palette.

For example, the above theme for the navigation pane is set to red color.

Enable Client Logo

Use this option to display the uploaded logo at the bottom of the application menu and on the log in page of the application.

For example, the following application menu displays a logo.



Upload Client Logo

Use this option to upload a logo to display it on the application menu and log in page of the application.

To upload a logo, click , browse, and select a logo file.

Hide disabled modules from end user view

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

5. Click **Save**.

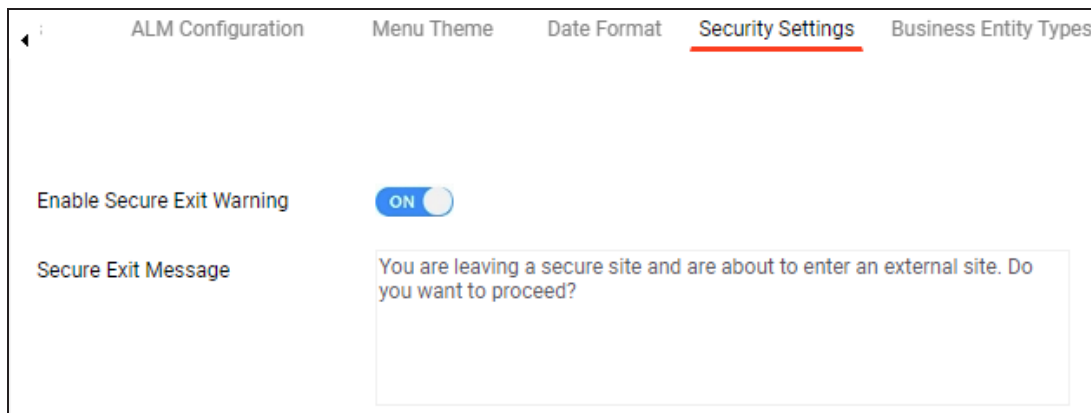
The menu theme is configured.

Configuring Security Setting

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

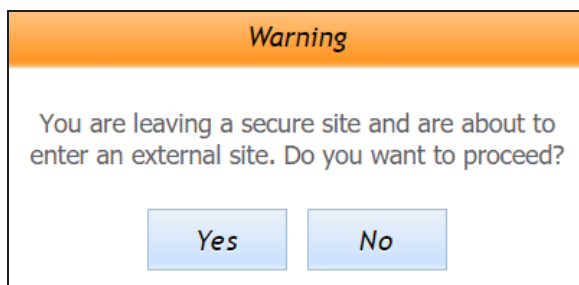
To configure security setting, go to **Application Menu > Settings > Miscellaneous Configurations > Security Settings**.

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



The screenshot shows the 'Security Settings' tab in a configuration menu. The 'Enable Secure Exit Warning' toggle is turned ON. Below it, the 'Secure Exit Message' field contains the text: 'You are leaving a secure site and are about to enter an external site. Do you want to proceed?'.

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



The dialog box has an orange header with the word 'Warning'. The main text reads: 'You are leaving a secure site and are about to enter an external site. Do you want to proceed?'. At the bottom, there are two buttons: 'Yes' and 'No'.

You can add or edit the **Secure Exit Message**.

Configuring Business Entity Types

You can configure background color, text color, and icon of any environment and table.

1. Go to **Application Menu > Settings > Miscellaneous Configurations > Business Entity Types**.

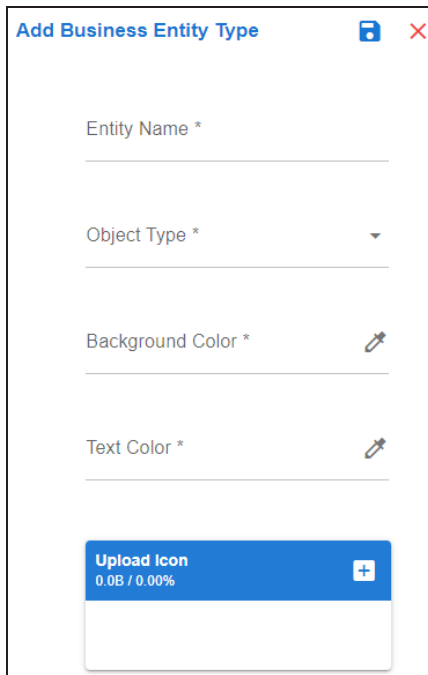
The following page appears.

Business Entity Types							
#	Entity Name	Object Type	Background Color	Text Color	Icon	Created By	Created Date Time
1	System	SYSTEM				System	12-05-2022 07:...
2	Amazon R...	ENVIRONMENT				System	12-05-2022 07:...
3	ARANGODB	ENVIRONMENT				System	12-05-2022 07:...

2. Click .

Configuring Business Entity Types

The Add Business Entity Type page appears.



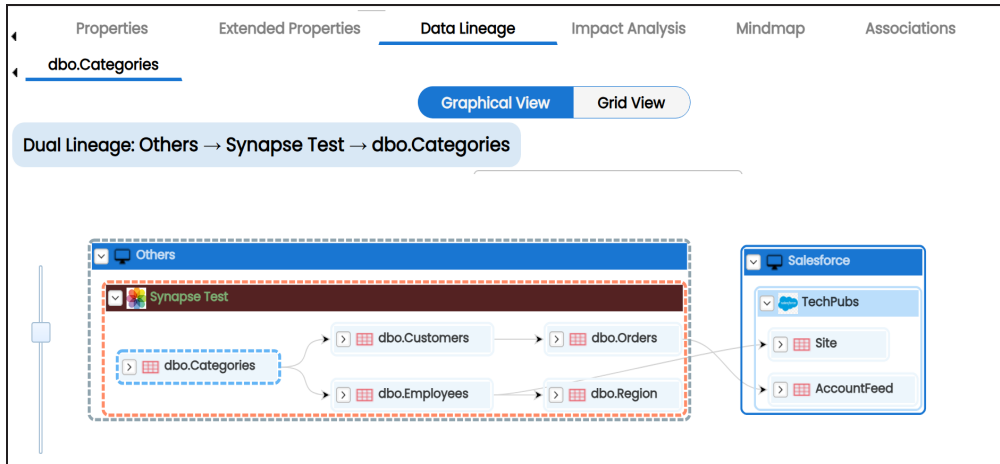
3. Enter appropriate values in the fields. Fields marked with an asterisk are mandatory. Refer to the following table for field descriptions.

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

4. Click .
The uploaded file is used as an icon.
 5. Click .
- The business entity type is saved.

Configuring Business Entity Types

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



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

Configuring IDR Setting

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

Once you configure the IDR setting and authenticate the token, you can [schedule jobs](#) to sync data between the instances.

For more information about configuring erwin DI Cloud, refer to [erwin DI Cloud Configuration](#).



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

To configure the IDR settings, follow these steps:

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

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

Instances Grid		Scheduled Jobs						⌂ +	
#	Instance Name	Instance URL	Description	Created By	Created Date	Last Modified By	Last Modified Date	Actions	
1	Data On Cloud 34	http://10.250.30.39:8080/DiSuite14...	Instance Authentication Grid for D...	Administrator	22-07-2024 14:26:39	Administrator	22-07-2024 14:26:39	  	
2	Cloud 11	http://10.250.30.39:8080/DiSuite14...	Links to the Cloud 11, Quest hosted.	Administrator	22-07-2024 14:28:34	Administrator	22-07-2024 14:28:34	  	

2. Click .

Configuring IDR Settings

The Configure Instance page appears.

Configure Instance

Instance Name *

Instance URL *

Authorization Token *

Description *

Align

B I

U

Link

Unlink

List

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

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

Configuring IDR Settings

Field Name	Description
Description	Specifies the description of the instance.

- Click  to test the connection between the instances.
- Click .

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

Instances Grid		Scheduled Jobs						C +	
#	Instance Name	Instance URL	Description	Created By	Created Date	Last Modified By	Last Modified Date	Actions	
1	Data On Cloud 34	http://10.250.30.39:8080/DiSuite14...	Instance Authentication Grid for D...	Administrator	22-07-2024 14:26:39	Administrator	22-07-2024 14:26:39	   	
2	Cloud 11	http://10.250.30.39:8080/DiSuite14...	Links to the Cloud 11, Quest hosted.	Administrator	22-07-2024 14:28:34	Administrator	22-07-2024 14:28:34	   	

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

You can manage the IDR configuration using the following options:

- Edit** (

Configuration Guide | 187

Scheduling IDR Jobs

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

For more information about configuring an IDR instance, refer to [Configuring IRD Settings](#).

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

For more information about the steps to configure erwin DI Cloud, refer to [erwin DI Cloud Configuration](#).



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

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

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

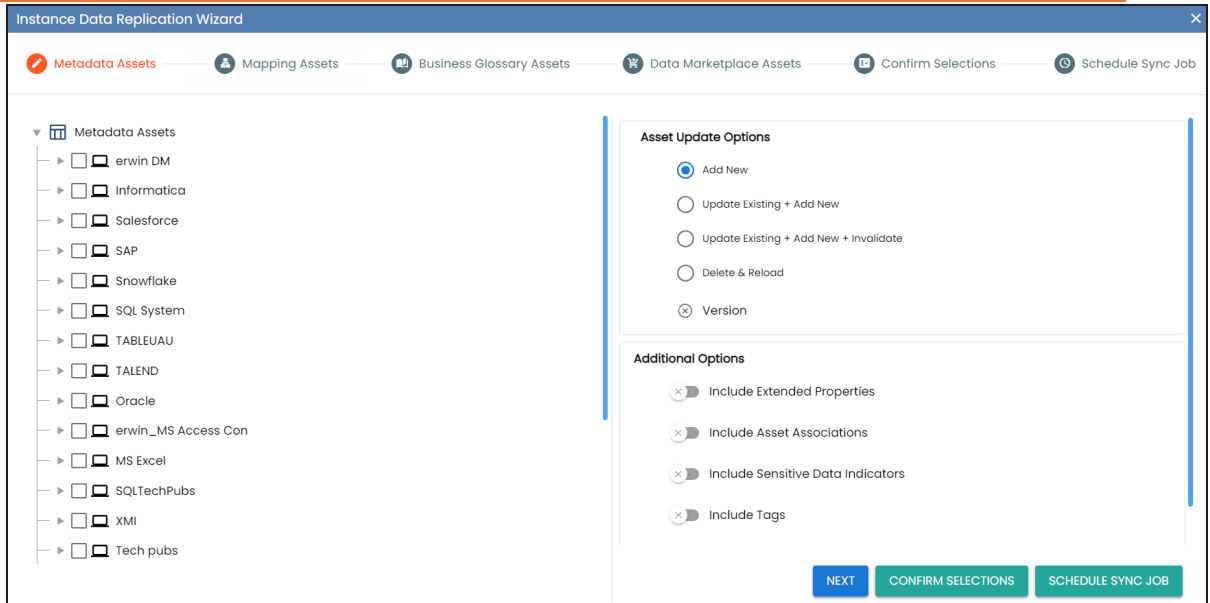
The following page appears and displays scheduled jobs for data sync.

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

2. Click **+**.

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

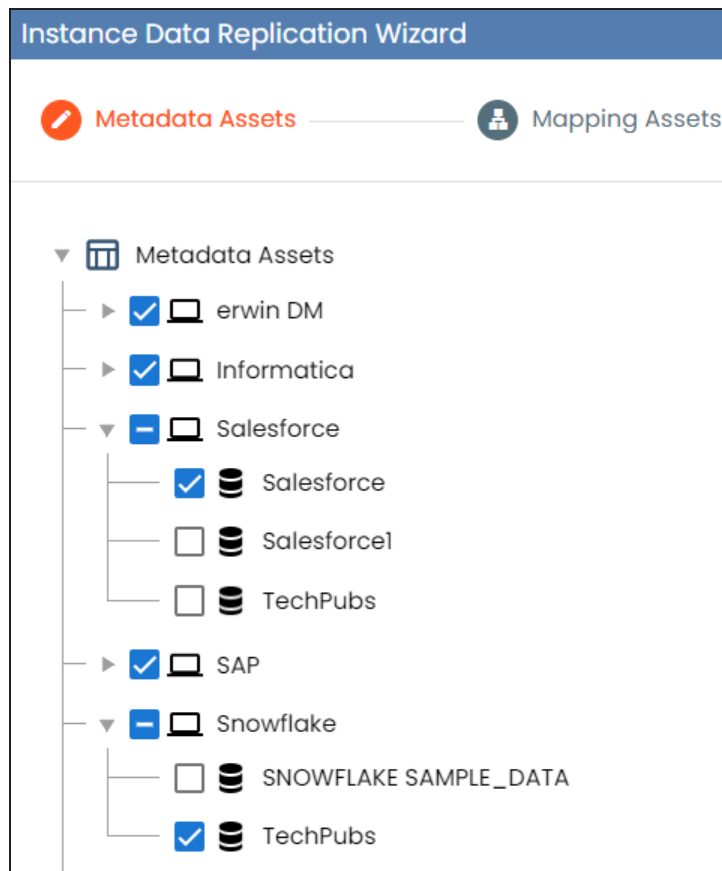
Scheduling IDR Jobs



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

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

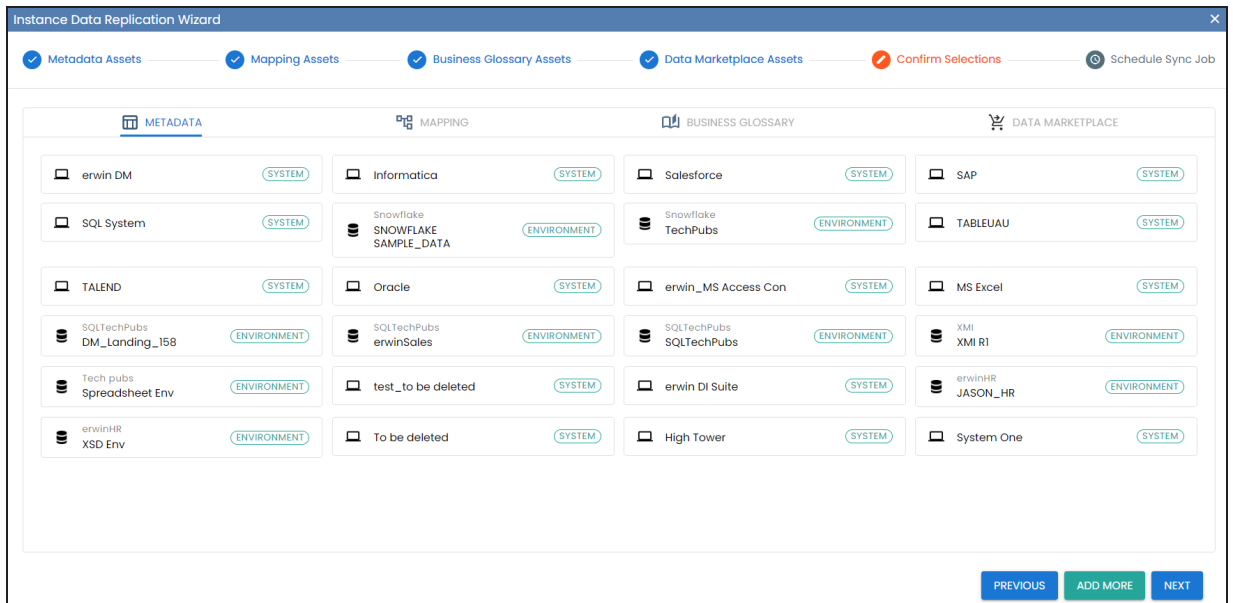
lication.



- On the Metadata Assets tab, choose the asset update options and additional options based on your requirements. For more information on these options, refer to the [Asset Update Options](#) section.
- Click **Next**. This action navigates you to the different asset types for data selection and replication.
Repeat steps 3 to 5 to select assets on the Mapping Assets, Business Glossary Assets, and Data Marketplace Assets tabs.
- Select required assets and asset update options from the wizard. Then, click **Next** to navigate to a different asset type to continue your selection based on your requirements.
- Click **Next**.
The Confirm Selections tab will appear, and display the selected assets for each asset

Scheduling IDR Jobs

type.



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

Additionally, you can click **Add More** to add additional assets before scheduling an IDR job.

Scheduling IDR Jobs

8. Click **Next** to go to the Schedule Sync Job tab.

The screenshot shows the 'Instance Data Replication Wizard' with the 'Schedule Sync Job' tab selected. The wizard has six steps: Metadata Assets, Mapping Assets, Business Glossary Assets, Data Marketplace Assets, Confirm Selections, and Schedule Sync Job. The 'Schedule Sync Job' tab contains the following fields and options:

- Job Name:** IDRJob_1721731324521
- Run Now:** A toggle switch that is currently turned on.
- Schedule Job On:** 23-07-2024 12:08:14, with a calendar and clock icon for selection.
- Local or Server:** A radio button group with 'Local' selected and 'Server' unselected.
- Interval:** A dropdown menu set to 'Only Once'.
- Send Email:** A toggle switch that is currently turned off.
- Master erwin Data Intelligence Instance:** A dropdown menu showing 'Data On Cloud 34'.
- Message:** 'Incase you cannot find your instance in the above drop down' with a 'Create a new instance' button.
- Navigation:** 'PREVIOUS' and 'FINISH' buttons at the bottom right.

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

Field Name	Description
Job Name	Specifies the job name.
Run Now	Specifies whether to run an IDR sync job immediately.  Enabling this option disables Schedule Job On, Local or Serve, and Interval options.
Schedule Job On	Specifies the date and time of the job. Use  to select a date, and  to select a time. For example, 11-01-2041 16:41.
Local or Server	Specifies whether the job uses local or server time. Local: Indicates that the job refers to the local machine Server: Indicates that the job refers to the machine where your application is deployed
Interval	Specifies the frequency of the job.

Scheduling IDR Jobs

Field Name	Description
	• Once: Indicates that the job runs only once • Every Day: Indicates that the job runs every day • Every Week: Indicates that the job runs every week • Every Month: Indicates that the job runs every month
Send Email	Switch Send Email to ON to receive a job notification.
Email ID	This field is autopopulated with your email ID. You receive email notifications about the scheduled job from the administrator's email ID.  This option is available when the Send Email option is switched to ON.
CC Email Id(s)	Specifies a list of email IDs that should receive email notifications about the scheduled job. Hit enter after each to add multiple email IDs.  This option is available when the Send Email option is switched to ON.
Select the Master erwin Data Intelligence Instance to push the selected data to	Specifies the erwin DI Cloud instance to replicate the selected data based on the scheduled job.
Create a new Instance	Use this option to create a new instance for data replication using the authentication token. For more information about creating an IDR instance, refer to Configuring IDR Setting .

9. Click **Finish**.

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

Asset Update Options

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

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



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

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

Scheduling IDR Jobs

Section	Option	Description
	figurations for Associations and Relationships	

Configuring License

A license to erwin DI is for limited duration and you can access different modules depending on your license. You can also update your license before it expires.

To update your license, follow these steps:

1. Go to **Application Menu > Settings > License Key**.

The License tab appears.

The screenshot shows the 'License' configuration page. At the top, there is a 'License' tab and a 'Value' column. Below this, there is a 'Company Name: Dev License' field. To the right, there is a 'Paste License' button with a green download icon. Below the 'Company Name' field, there is a table with two columns: 'Title' and 'Value'. The table contains the following rows:

Title	Value
Allowed Projects:	30
Allowed Subjects Per Project:	30
Codeset Manager:	Enabled
Release Manager:	Enabled
Reference Data Manager:	Enabled
Code Automation Templates:	Enabled
Test Manager:	Enabled
Requirements Manager:	Enabled
Reporting Manager:	Enabled

At the bottom right of the page, there is an 'Activate License' button.

2. Verify your license information. On this page, you can view license validity, enabled modules, user, and login details applicable for this license in a tabular format. For more information, refer to the following table.

Configuring License

Title	Description
Company Name	Specifies the name of your company/organization.
Allowed Projects	Specifies the allowed number of projects that you can create in Mapping Manager. For example, when the value is set as 30, you can create 30 projects in Mapping Manager.
Allowed Subjects Areas Per Project	Specifies the allowed number of subject areas that you can create per project. For example, when the value is set as 2, you can create 2 subject areas in a project.
Modules	Specifies the list of modules that are enabled for this license. Your license can include modules, such as Metadata Manager, or Mapping Manager, or Code Automation Template, or other relevant modules based on your license. The value Enabled indicates the module is included with your license.
Allowed Users	Specifies the allowed number of users that you can create in Resource Manager. For example, when the value is set as 10, you can create upto 10 user roles. This includes all user role types.
Concurrent Logins Allowed	Specifies the number of allowed logins for a user at the same time. For example, when the value is set as 10, the same user can log in at 10 different instances at the same time.
User Multi Login Allowed	Specifies whether multiple logins are allowed for users or not.
License Created Date	Specifies the license creation date and time.
Validity	Specifies the license validity in days.
License	Specifies the license expiry date and time.

Configuring License

Title	Description
Expiry Date	

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

The license is updated.