



erwin Data Intelligence

Platform Dashboard 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

Platform Dashboard	6
Resource Manager	9
Business Glossary Manager	13
Marketplace Assets	16
Metadata Manager	18
Mapping Manager	19

Platform Dashboard

The Platform Dashboard provides a centralized overview of key metrics, such as metadata metrics, mapping metrics, marketplace metrics, and insights on data governance, data lineage, data sources, user activity, and data quality.

The dashboard aims to assist executives and administrators in understanding erwin DI's performance, usage, and value creation of erwin DI within the organization. It helps you to analyze the activities of different modules based on domains (catalogs) and the creation trends of assets.

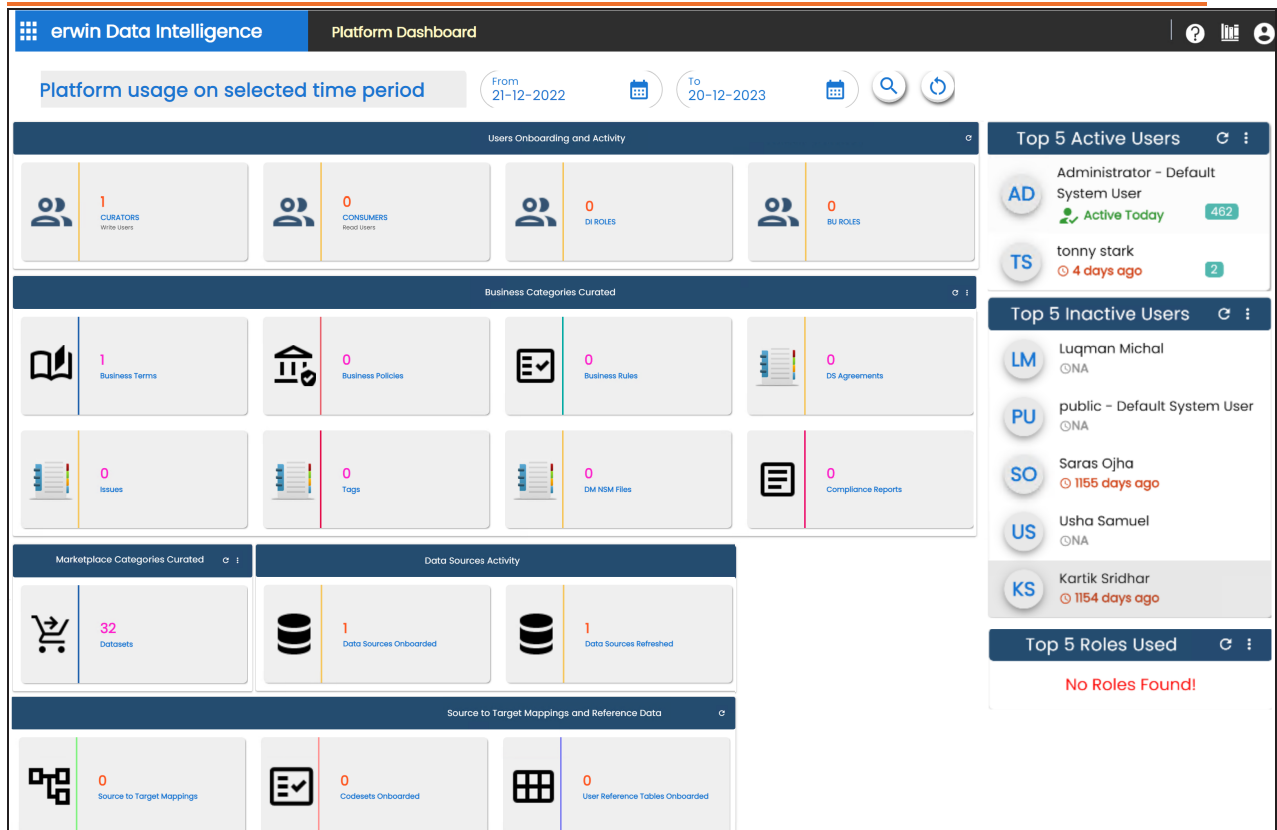


Ensure that the roles assigned to dashboard users have the necessary access and permissions. For more information, refer to the [Creating Roles](#) topic.

To access the Platform Dashboard, go to **Application Menu > Platform Dashboard**.

The Platform Dashboard page appears.

Platform Dashboard



Each card is clickable and displays information using charts or graphs that provide a snapshot of the underlying data.

You can use the Platform usage on selected time period option to filter module usage for specific time periods. To select a period, click  under From and To fields and then click . To reset the search results, click .

UI Section	Function
Users Onboarding and Activity	Displays the number of Curators (Write Users), Consumers (Read Users), DI Roles, and BU Roles.
Business Assets Curated	Displays the number of each type of business asset.
Business Categories Curated	Displays the number of each type of business category. This section is available only when you switch to Categories. To view this section, click  on the section title bar and select Categories .

Platform Dashboard

Marketplace Assets Curated	Displays the number of each type of marketplace asset.
Marketplace Categories Curated	Displays the number of each type of marketplace category. This section is available only when you switch to Categories. To view this section, click  on the section title bar and select Categories .
Data Sources Activity	Displays the number of onboarded and refreshed data sources.
Source To Target Mappings and Reference Data	Displays the number of source to target mappings and reference data.
Top 5 Active Users	Displays a list of top five active users based on login count.
Top 5 Inactive Users	Displays a list of top five inactive users based on login count.
Top 5 Roles Used	Displays a list of top five roles based on login count.

Using the platform dashboard, you can view and analyze activity and usages of the following modules:

- [Resource Manager](#)
- [Business Glossary Manager](#)
- [Marketplace Assets](#)
- [Metadata Manager](#)
- [Mapping Manager](#)

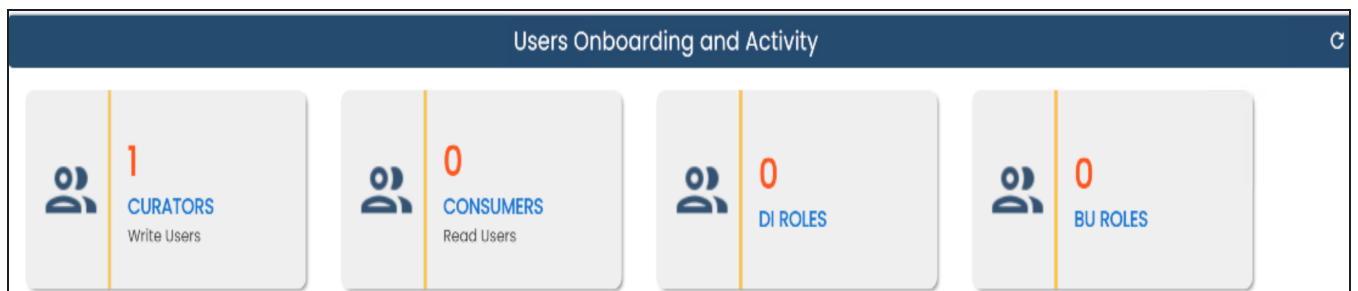
Resource Manager

The Resource Manager dashboard displays:

- [Users Onboarding and Activity](#)
- [Top 5 Active Users](#)
- [Top 5 Inactive Users](#)
- [Top 5 Roles Used](#)

Users Onboarding and Activity

The Users Onboarding and Activity section displays the number of Curators (Write Users), Consumers (Read Users), DI Roles, and BU Roles created during the selected period.



You can drill down to view a list of users and roles. For example, to view a list of users with Write access, click the **CURATORS** tile.

The Navigation pop-up appears. Clicking **Yes** takes you to the Resource Manager page. For example, the following image displays a list of users with Write access.

Resource Manager

erwin Data Intelligence

Resource Manager

Users

Roles

Profiles

Governance Responsibilities

Access Rights Report

SETTINGS

USERS (26)

AD Administrator
Administrator - Default System

DV dvaghani
Daya Vaghani

ES esimpson
Erica Simpson

JA jadams
Joey Adams

JD janedoe
Jane Doe

JD John Doe
John Doe

JW jwilson
Joey Wilson

KS ksridhar
Kartik Sridhar

LM lmichal
Luqman Michal

User Details

User Account Activities

User Assignments

Access Rights

Login Type

User ID

User Full Name

Password

Mobile

Company Title

Default Role

Created By

Last Modified By

Landing Module

User Image

User Roles

Role Name

Role Description

Database

Administrator

Administrator - Default System U

9999999999

Administrator

Admin

System

System

Mapping Manager

Administrator

Administers the mapping manager module and gains administration access to all modules

Telephone Number

Email ID

Alternate Telephone Number

Manager Name

Company

Created Date Time

Last Modified Date Time

Theme

Language Preference

User Type

9999999999

abc@abc.com

9999999999

erwin, Inc.

26-02-2020 03:48:28

26-02-2020 03:48:28

erwin

English

DI

Top 5 Active Users

The Top 5 Active Users card displays a list of top five active users based on login count. The numbers next to a user's name indicate login count. For example, 509, 2.

Top 5 Active Users

AD

Administrator - Default System
User

Active Today

509

TS

tonny stark

12 days ago

2

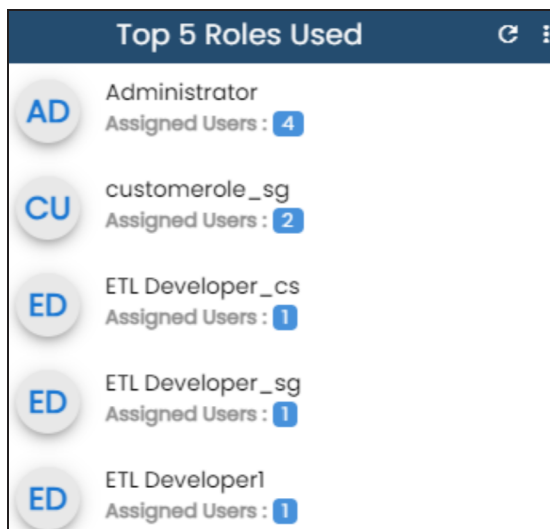
Top 5 Inactive Users

The Top 5 Inactive Users card displays a list of top five inactive users based on login count.



Top 5 Roles Used

The Top 5 Roles Used card displays a list of top five used roles based on login count. On the card, the number indicates how many users are assigned roles.



You can manage the displayed information using the following options:

Resource Manager

Refresh ()

Use this option to refresh the data on the cards.

More Options ()

Use this option to control the number of records displayed on the card. Click  and then select the required number. For example, if you select 10, then card title changes to Top 10 Active Users and displays a list of top ten active users.

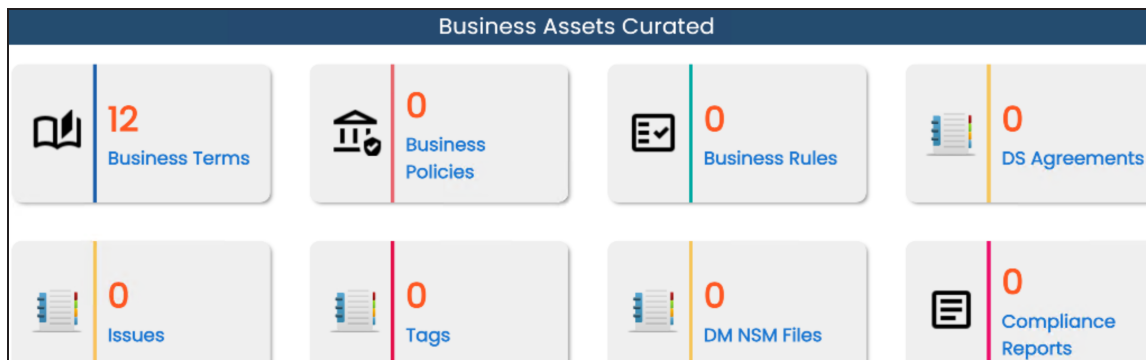
Business Glossary Manager

The Business Glossary Manager dashboard displays:

- [Business Assets Curated](#)
- [Business Categories Curated](#)

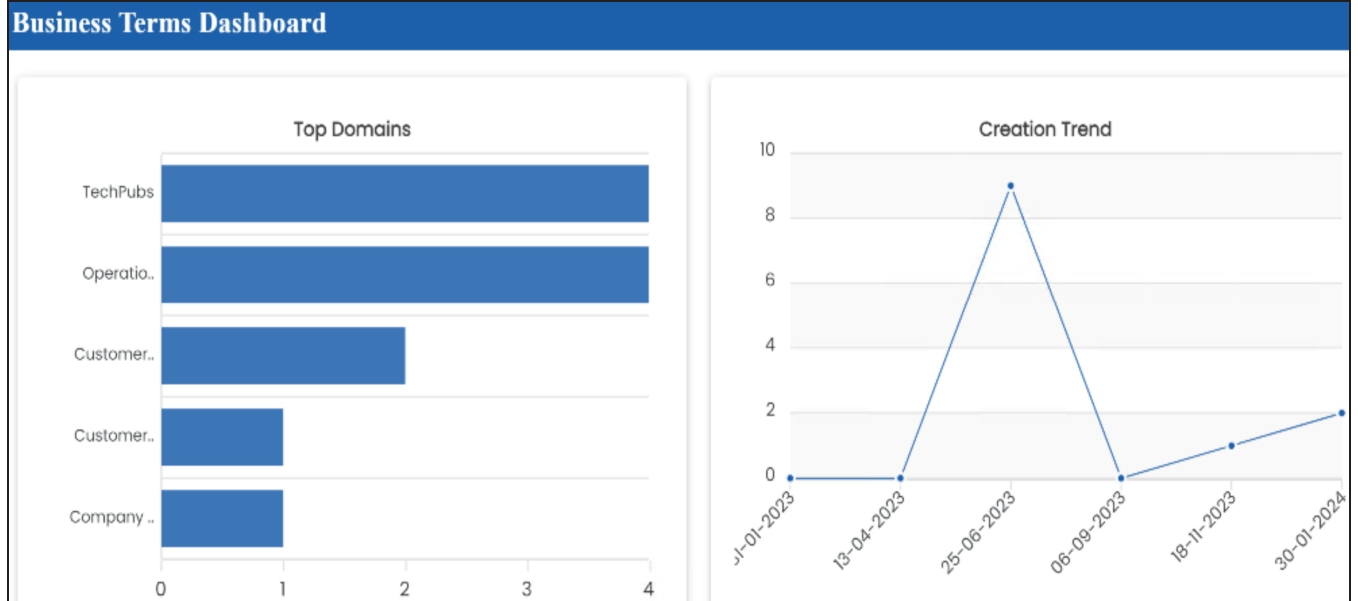
Business Assets Curated

The Business Assets Curated section displays the number of assets under each business asset type created during the selected period.



You can drill down each tile to view detailed information. For example, to view business terms, click the **Business Terms** tile.

The Business Terms Dashboard appears.



This dashboard displays the following information:

- **Top Domains:** By default, it displays the top domains (catalogs). Hover over a bar to view the total number of assets under a domain.
- **Creation Trend:** It displays month-wise asset creation trend based on the number of assets.

You can switch the card to view the business categories curated during the selected period.

To switch to categories, click  and then click **Categories**.

Business Categories Curated

The Business Categories Curated section displays the number of each business category.



You can drill down each tile to view detailed information. For example, to view business terms, click the **Business Terms** tile.

The Business Terms Catalogs page appears and displays the category Name, category Hier-archy, description, and created Date.

Business Terms Catalogs				
#	Category Name	Category Hierarchy	Description	Created Date
1	Operations	Operations		06-06-2023 14:07:59

Marketplace Assets

The Marketplace Assets dashboard displays:

- [Marketplace Assets Curated](#)

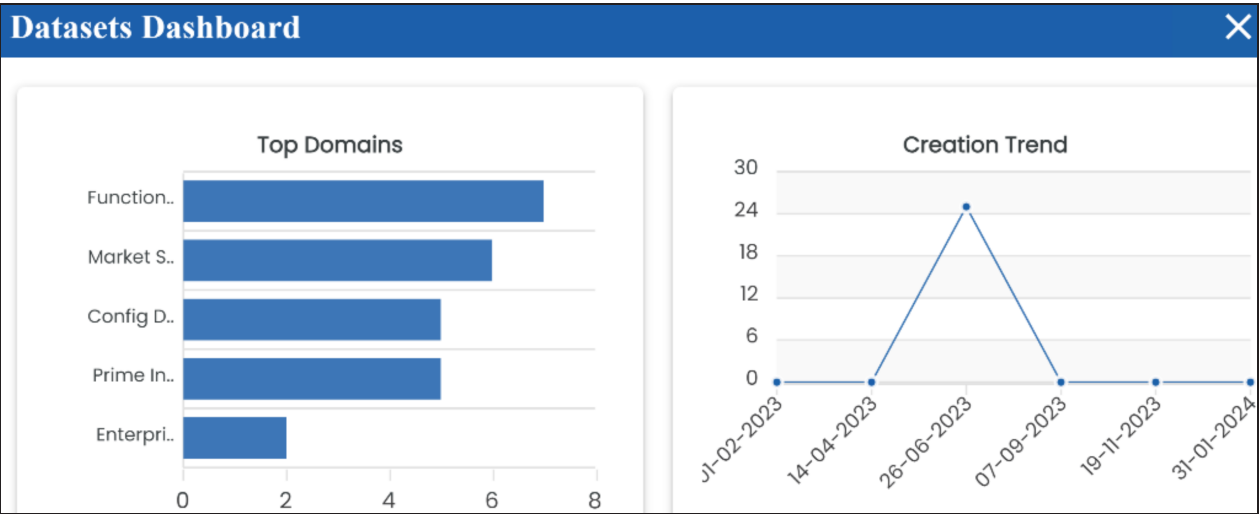
Marketplace Assets Curated

The Marketplace Assets Curated section displays the number of assets under each marketplace asset type created during the selected period.



You can drill down to view detailed information. For example, to view datasets, click the **Datasets** tile.

The Datasets Dashboard appears.



Marketplace Assets

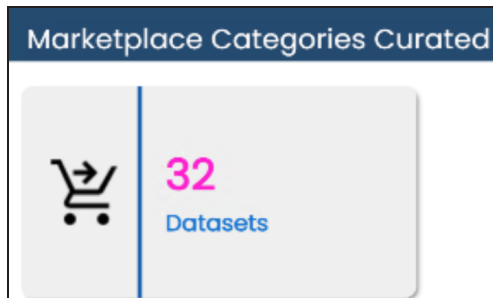
This dashboard displays the following information:

- **Top Domains:** By default, it displays the top domains (catalogs). Hover over a bar to view the total number of assets under a domain.
- **Creation Trend:** It displays month-wise asset creation trend based on the number of assets.

You can switch the card to view the marketplace categories curated during the selected period. To switch to categories, click  and then click **Categories**.

Marketplace Categories Curated

The Marketplace Categories Curated section displays the number of marketplace category.



You can drill down to view detailed information. For example, to view datasets, click the **Datasets** tile.

The Datasets Catalogs page appears and displays category name, category hierarchy, description.

Datasets Catalogs				X
#	Category Name	Category Hierarchy	Description	
1	Config Datasets	Config Datasets	All docs related to config can be accessed here.	
2	Prime Info	Prime Info	Primary Data Structure and Classification Group	
3	Market State Data	Market State Data	Primary Data Structure and Classification Group	

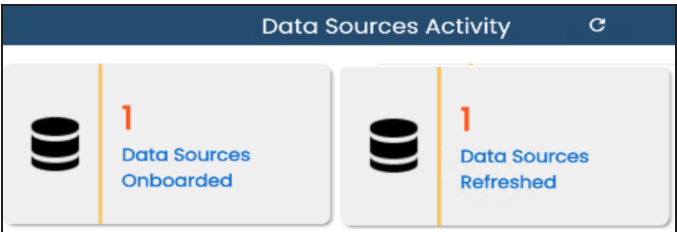
Metadata Manager

The Metadata Manager dashboard displays:

- [Data Sources Activity](#)

Data Sources Activity

The Data Sources Activity section displays the total number of onboarded and refreshed data sources created during the selected period.



You can drill down each tile to view detailed information. For example, to view on-boarded data sources, click the **Data Sources Onboarded** tile.

The Data Sources Onboarded page appears and displays system and environment names, database type, created by, and created date.

Data Sources Onboarded					
Please Select Database Type					
All					
#	System Name	Environment Name	Database Type	Created By	Created Date
1	System One	One Env	MS Excel File	Administrator	20-12-2023 06:25:14
2	Tech pubs	Spreadsheet Env	XML	Administrator	13-12-2023 06:54:01

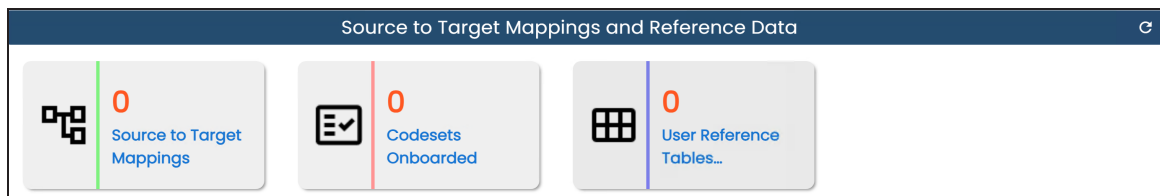
Mapping Manager

The Mapping Manager dashboard displays:

- [Source To Target Mappings and Reference Data](#)

Source To Target Mappings and Reference Data

The Source To Target Mappings and Reference Data section displays the total number of source to target mappings, onboarded codesets, and user reference tables created during the selected period.



You can drill down each tile to view detailed information. For example, to view source to target mappings, click the **Source to Target Mappings** tile. The Navigation pop-up appears. Clicking **Yes** takes you to the Mapping Manager page. To view mappings, click the **Mapping Manager Dashboard** pane.

For example, the below image displays the projects and mappings.

Mapping Manager

