

GUIDE

erwin Data Intelligence

Configuration Guide 15.0



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Contents

Configuration	10
Configuring Discover Assets	11
Configurations	11
Scheduling Synchronization Jobs	13
Layout Config	16
Configuring Mapping Manager	18
Configuring Change Log Settings	19
Configuring User-defined Fields	22
Configuring Version Display	25
Configuring Mapping State Settings	28
Configuring Notifications	31
Configuring Metadata Manager	40
Configuring Table and Column Classes	41
Configuring Notifications on Scanning Metadata	44
Configuring Version Display	46
Configuring Notifications on Profiling Data	48
Configuring Data Profiling and DQ Scores	50
Enforcing Credentials for Data Access or Preview	53
Displaying User Defined Fields	54
Configuring Codeset Manager	55
Configuring Release Manager	57
Configuring Environments for Release Objects	58

Configuring Release Object Types	61
Configuring Release and Release Object Statuses	63
Configuring History Types	66
Configuring Notifications about Release Objects	68
Configuring Test Manager	69
Configuring Requirements Manager	70
Creating Templates	71
Adding Artifacts to Templates	73
Designing Forms	77
Managing Artifacts	83
Managing Templates	85
Configuring Email Settings	86
Configuring Version Display	90
Configuring Business Glossary Manager and Data Marketplace	92
Configuring Asset Types	94
Configuring Asset Details	97
Configuring Catalog Form	100
Configuring Asset Form	106
Adding Asset Types	113
Configuring erwin DM NSM Asset	119
Configuring Associations and Relationships	121
Configuring Data Value Score	126
Parameters	126

Customizing Parameter Weights	126
Data Value Score Calculation	127
Configuring Data Value Score	127
Configuring Maturity Level Certification	134
Validations	134
Maturity Certification Rating	134
Configuration Maturity Certification	135
Other Configurations	141
Edit Property Options	142
Configuring Plugins	143
Setting Miscellaneous Configurations	145
Configuring Email Settings	147
Configuring Sensitivity Update Notifications	154
Configuring Sensitivity Classifications	156
Configuring Data Profiling	159
Enabling DQLabs	160
Accessing erwin Data Quality Configuration Details	161
Scheduling erwin Data Quality Jobs	166
Configuring Scheduled Jobs	169
Configuring Asset Settings	170
Configuring Version Retention	173
Scheduling Clean up Jobs	175
Setting History Retention Period (in months)	178

Configuring Workflow Settings	179
Configuring Language Settings	182
Configuring License Renewal Reminders	185
Configuring Form Validation Settings	187
Configuring Form Fields	190
Associating Forms	192
Managing Forms	194
Data Lineage Settings	196
Configuring HP ALM	198
Configuring Menu Theme	200
Configuring Security Setting	204
Configuring Business Entity Types	205
Configuring IDR Setting	208
Scheduling IDR Jobs	211
Asset Update Options	217
Configuring License	219
Configuring erwinAI	222
Prerequisites	222
Steps to Configure AI in erwin DI	222
Creating Organizations	223
Adding Licenses	225
Assigning Users	227
Enabling the Feature	229

Creating Access Keys	230
Verifying in erwin DI	233
Configuring Roles for the erwinAI Bot 15.1	234

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 manage configurations and layout preferences for the Discover Assets module. This page includes two tabs:

- [Configurations](#)
- [Layout Config](#)

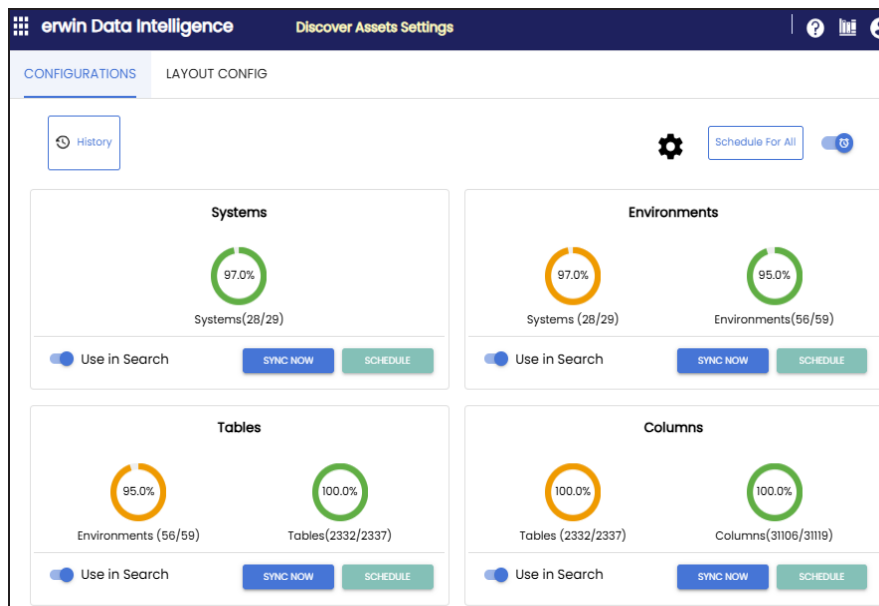
Configurations

The Configurations tab enables you to configure the Discover Assets module for 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.



History

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



Use this option to select whether extended properties are included as filters for technical and business assets. Switch the **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](#).



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 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**.

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

09-05-2025 07:11:03

Local

☒ Server

Interval

Every Day

☒ Repeat

Hours

☒ Minutes

1

Object Types

DS Agreements

Issues

Tags

Systems

Datasets

AI Models

Data Products

Tables

Environments

Columns

Mappings

Send Email

☒

Email Id

abc@abc.com

CC Email Id(s)

Hit the enter key for multiple email(s)

SUBMIT

- 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, Discover Assets Data Syncing or Systems_1650468274963. This field automatically populates a job name and is non-editable.
Schedule Job On	Specifies the date and time of the job. For example, 26-03-2025 14:02:53.
Local or Server	Specifies whether the job uses local or server time. • Local: Indicates that job uses date and time of 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 every day • 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 automatically 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 noti-

Configuring Discover Assets

Field Name	Description
	fications about the scheduled job. For example, ab.dav@xyz.com, cal.kai@xyz.com

3. Click **Submit**.

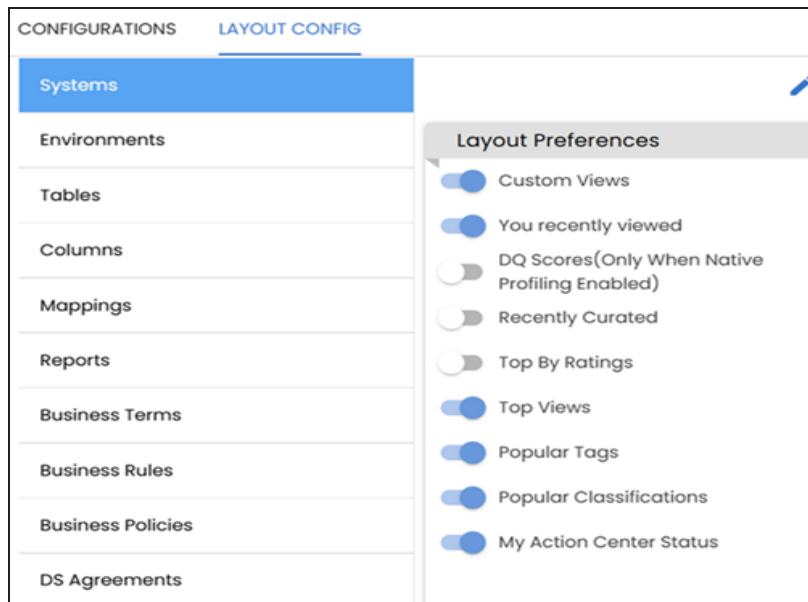
The synchronization job is scheduled.

Layout Config

The Layout Config tab enables you to configure layout preferences for each asset type displayed on the Discover Assets dashboard.

To configure the layout preferences, follow these steps:

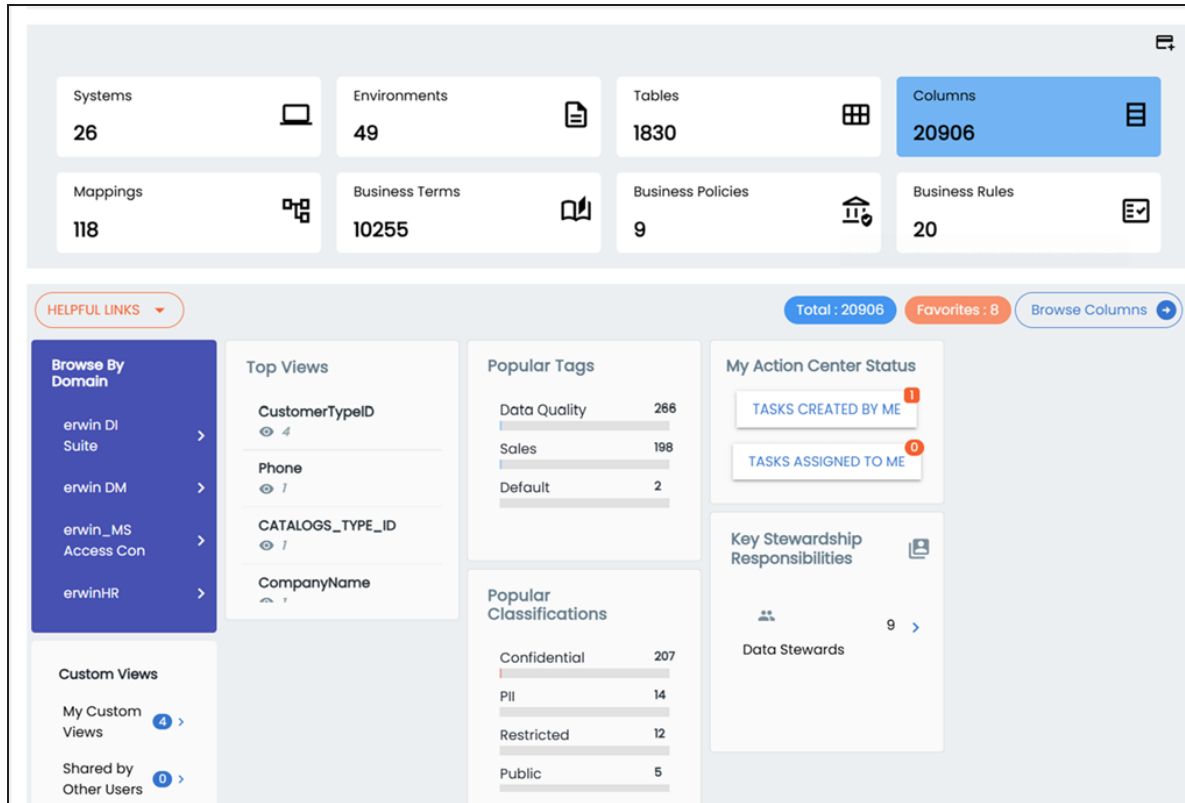
1. Click the **Layout Config** tab.
2. Select the asset type for which you want to configure the layout. For example, in the following image, Columns is selected, and available layout preferences are displayed.



Configuring Discover Assets

4. Switch the required layout preferences on or off, and then click .

The layout preferences are saved, and you can view them on the Discover Assets dashboard in the [Asset Workspace](#) section.



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:

erwin Data Intelligence Mapping Manager Settings | ? [Icons]

Change Log User Defined Fields **Version Display** Mapping State Settings

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

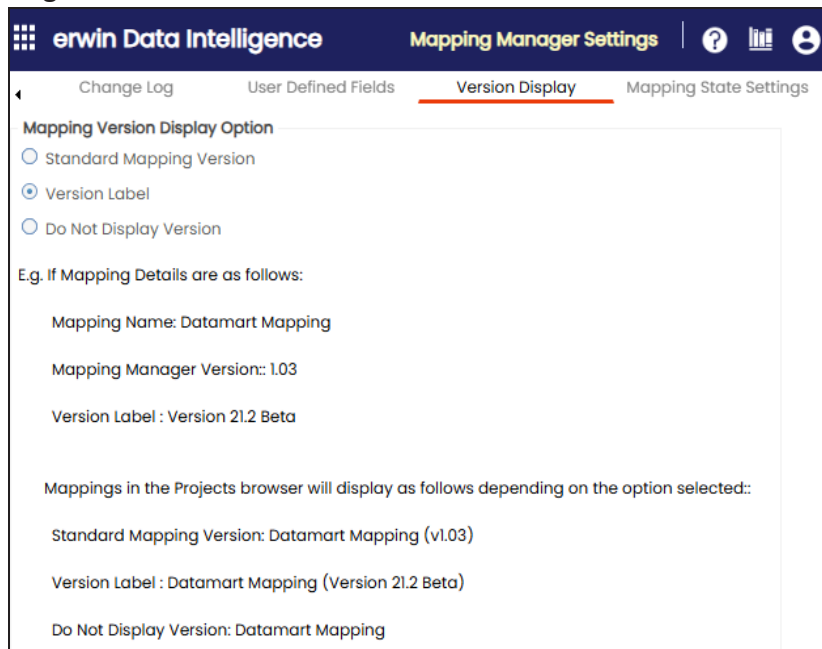
Configuring Change Log Settings

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.

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.

Mappings

BugTrial (v1.00)

Data Integration (v1.00)

MappingTargets

erwinSalesIntegration (v1.00)

SalesforceIntegration (v1.00)

TechPubsBUgTrial (v1.00)

FlowTest (0)

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)

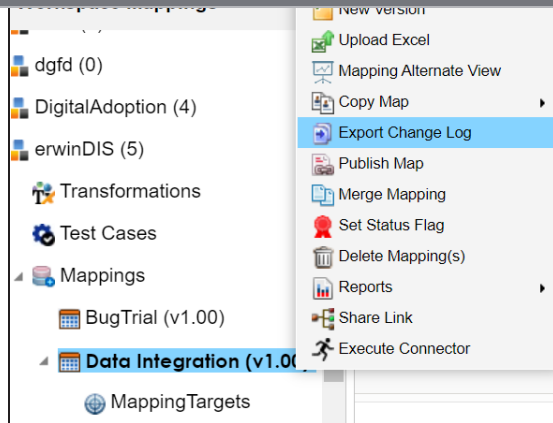
You can use this check box only when the Enable Change Log Capture for Mapping Specifications check box is selected.

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.

Configuring Change Log Settings



Enable Change Log capture for Mapping Specification tabs

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.

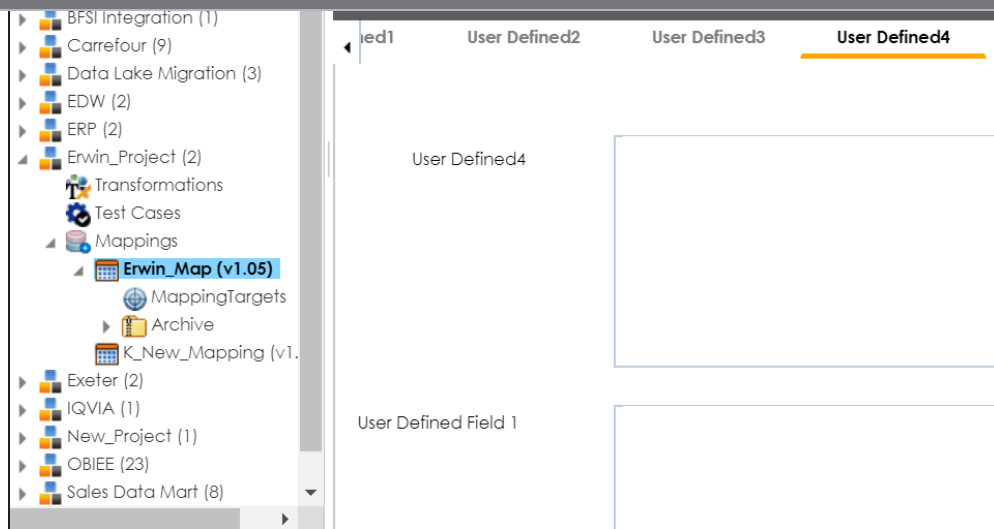
User Defined Tabs :

☒ 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

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

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

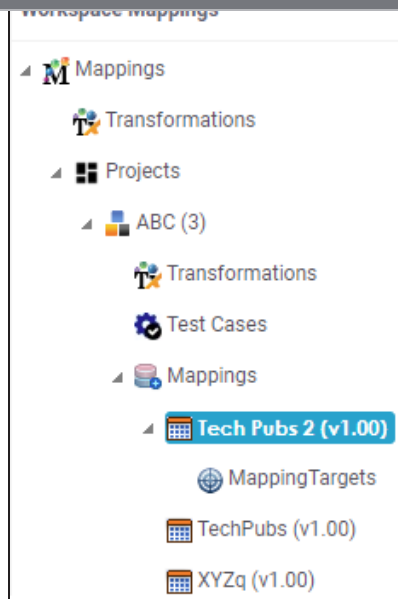
3. Use the following options:

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.

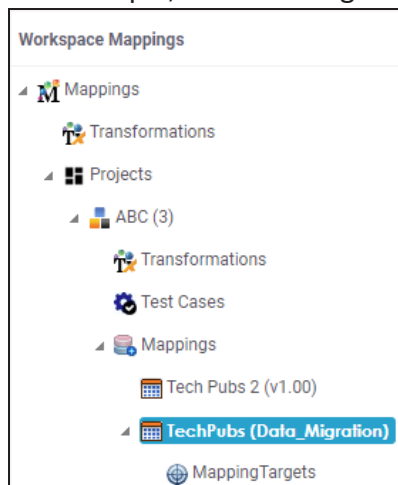
Configuring Version Display



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 03:48:31
2	Approved	SYSTEM	2020-02-26 03:48:31	SYSTEM	2020-02-26 03:48:31

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							
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

#	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

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 and 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 or 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.

[Specifications to Users](#) topic.

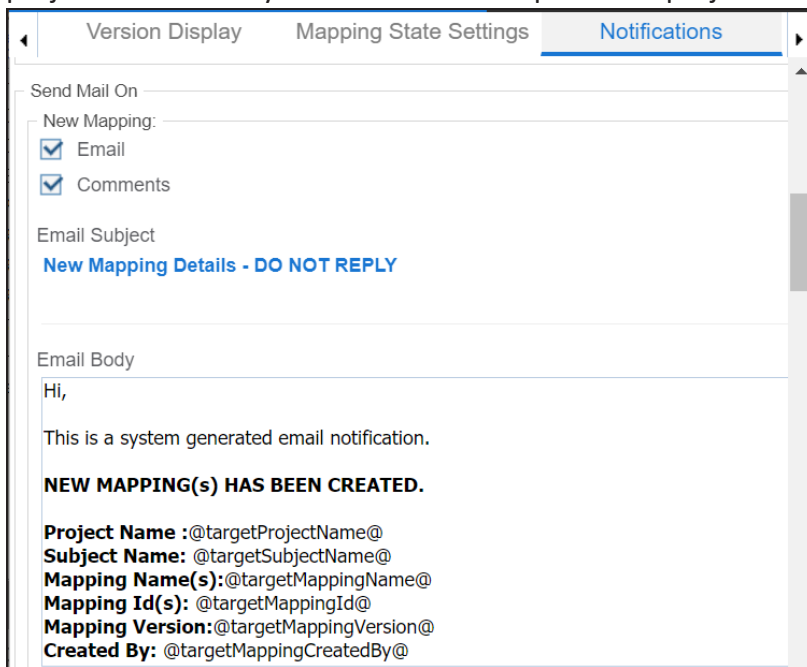
Forgot Password

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.

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.

Version Display Mapping State Settings **Notifications**

Save Mapping:

☐ Email

☐ Comments

Email Subject

Save Mapping Details - DO NOT REPLY

Email Body

Hi,

This is a system generated email notification.

A MAPPING HAS BEEN SAVED.

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

New Version: ☒ Email ☒ Comments

Email Subject
New Version Details - DO NOT REPLY

Email Body
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

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

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

Upload XML:

☒ Email

☒ Comments

Email Subject

XML Mapping Details - DO NOT REPLY

Email Body

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

☒ 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							
Table Class							
#	Table Class	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Table_Class	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.

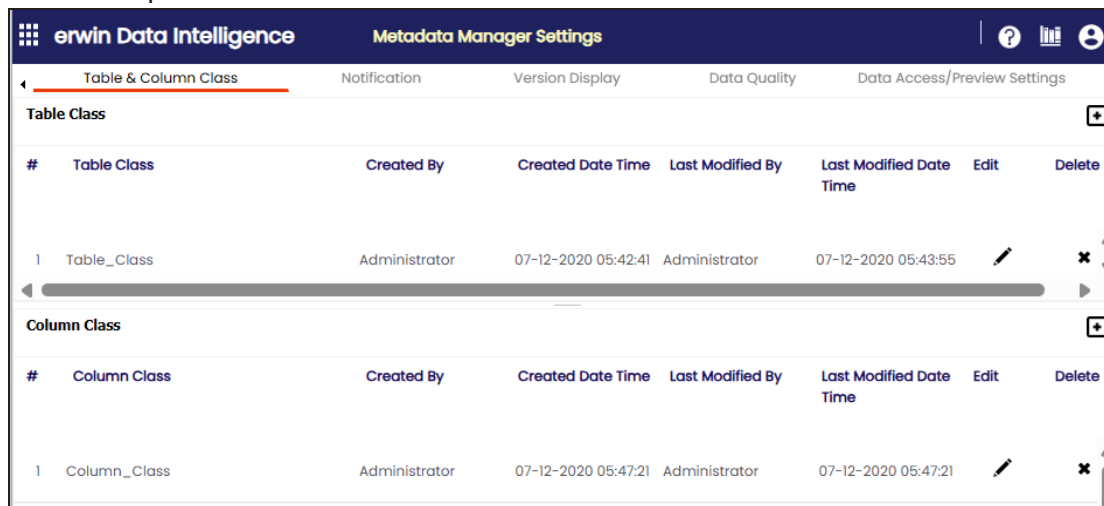
Configuring Table and Column Classes

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.



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

The Add Table Class page appears.

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 05:42:41.0

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.

Add Column Class
 

Name*

Description

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

Configuring Table and Column Classes

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

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

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 selected in the Metadata Manager. The 'Notification' sub-tab is active. The 'Data Quality' section has the 'Email' checkbox checked. The 'Email Subject' field contains the text: 'Data Profile Assessment Job Details @jobname@/@systemname@/@envname@/@tablename@'. The 'Email Body' field contains the text: 'Hi, Data Profile Assessment Job De'. Below the email body, there is a list of variables: '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

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.

Notification Version Display **Data Quality**

Notification **Settings**

Data Profile Configuration

Analyze character data for Max/Min v: ☒ ON

Most Frequent Patterns

Least Frequent Patterns

DQ Scores

Very High (9-10)

High (7-8)

Medium (5-6)

Low (2-4)

Very Low (0-2)

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

data for maximum and minimum. Switch 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.



Switch **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.

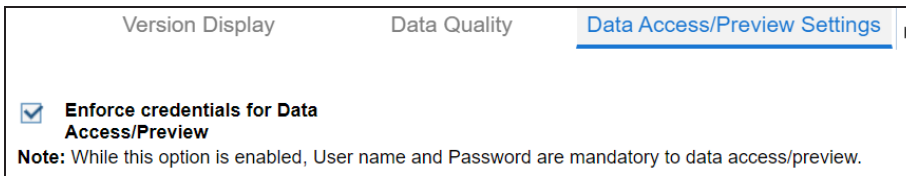
Enforcing Credentials for Data Access or Preview

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.



The screenshot shows a web interface with three tabs: 'Version Display', 'Data Quality', and 'Data Access/Preview Settings'. The 'Data Access/Preview Settings' tab is selected and underlined. Below the tabs, there is a checkbox labeled 'Enforce credentials for Data Access/Preview' which is checked. Below the checkbox, a note states: '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 : ☒ 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		Columns 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 column meta data level and can be used to tag additional meta data elements. Subject User Defined Fields : ☒ 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.

erwin Data Intelligence Codeset Manager Settings | ? [Bar Chart] [User]

Codeset Manager

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.

Edit CSM Settings [Save] [Close]

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.

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 .

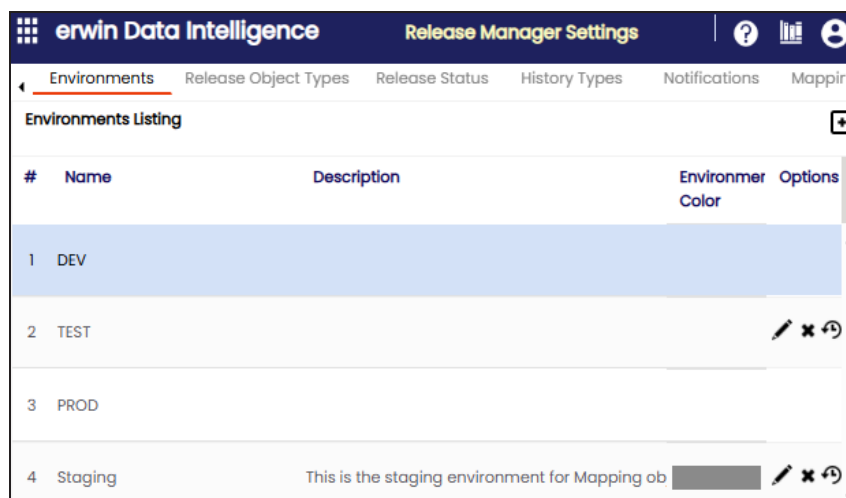
Configuring Release Manager

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

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.

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

2. Click .

The New Environment page appears.

New Environment

Name:*

Description:

Environment Color

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

Configuring Environments for Release Objects

Name:

Description:

Environment Color:

Hue: 0 Red: 255

Sat: 0 Green: 255

Lum: 100 Blue: 255

Select Cancel

5. Click **Select**.

6. Click .

The environment is added.

Environments					
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

To view history details, click 

Configuring Release Object Types

The Release Manager comes with three default release object types:

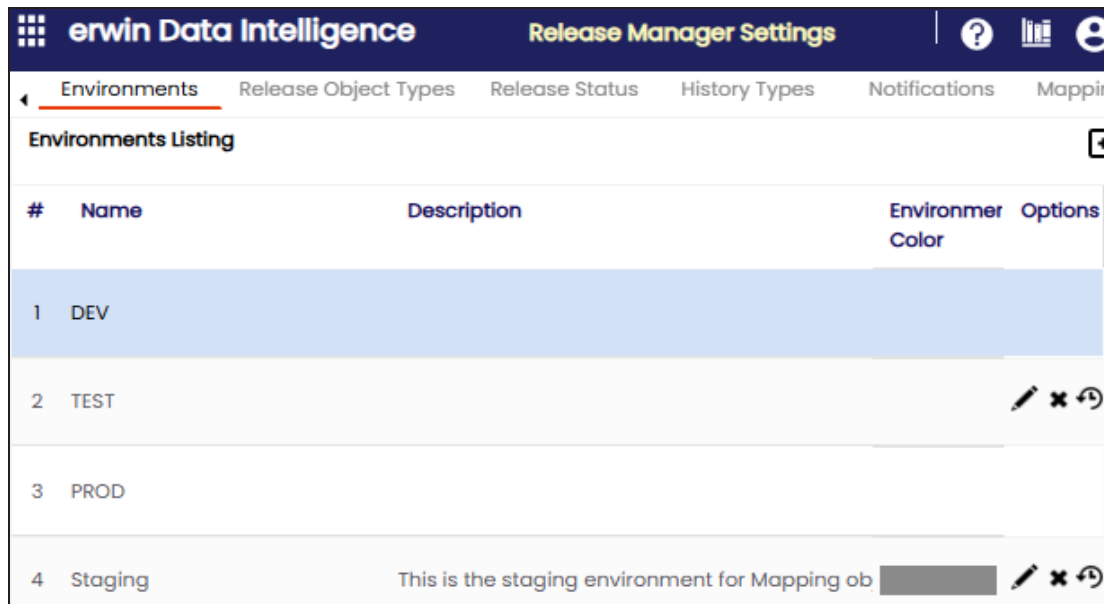
1. Data Item Mapping
2. Codeset
3. Code Mappings

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.



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

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

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.

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

The screenshot shows a configuration window with the following fields:

- Status Title:** A text input field with a red asterisk indicating it is mandatory.
- Description:** A text input field.
- Release Status:** A container with several sub-fields:
 - Text Color:** A color selection bar.
 - Background:** A color selection bar.
 - Border Color:** A color selection bar.
 - Border Type:** A dropdown menu.
 - Preview:** A small preview area.
- Migration Object Status:** A container with several sub-fields:
 - Text Color:** A color selection bar.
 - Background:** A color selection bar.
 - Border Color:** A color selection bar.
 - Border Type:** A dropdown menu.

- 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

Configuring Release and Release Object Statuses

Field Name	Sub-Field	Description
		Status.
	Preview	You can view the preview of the release status based 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



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 is divided into two main sections: 'Reset Password' and 'Migration Object'. Each section has an 'Email Subject' and an 'Email Body' field. The 'Email Body' field for 'Reset Password' contains a template: 'User Name: <%USERNAME%>\n Password: <%USERPASSWORD%>\n This is an automated message - Please dont reply to this mail'. The 'Email Subject' for 'Migration Object' is 'CMM Migration Object'.

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

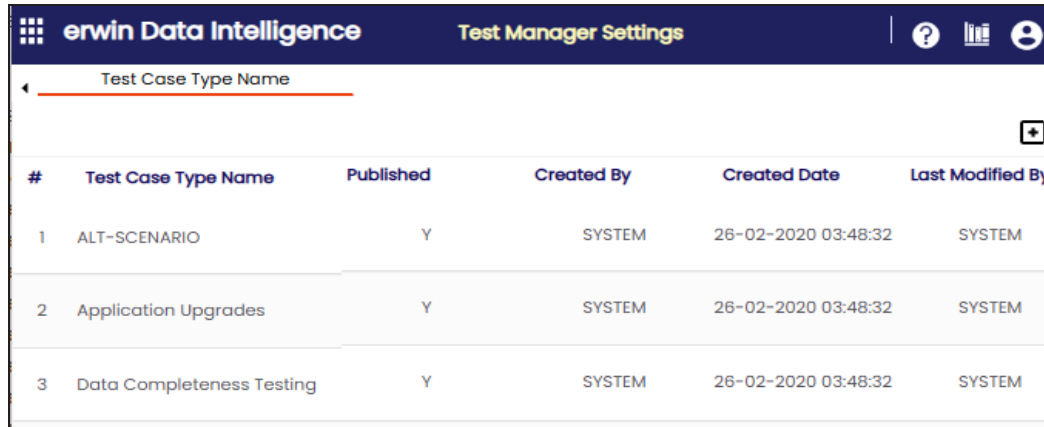
This email is used to send notifications to any concerned team member from the Admin Email Id which can be configured in [Email Settings](#).

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:

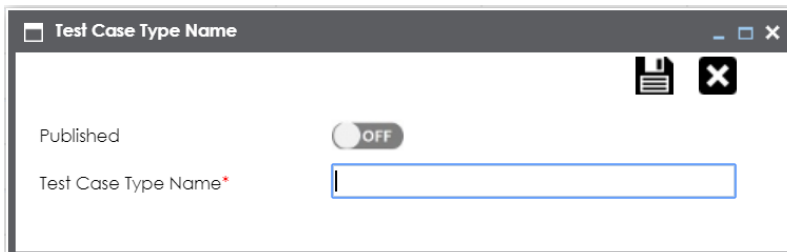
1. Go to **Application Menu > Settings > Test Manager**.



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

2. Click .

The following page appears.



3. Type the Test Case Type Name and Switch **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:

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

Creating Templates

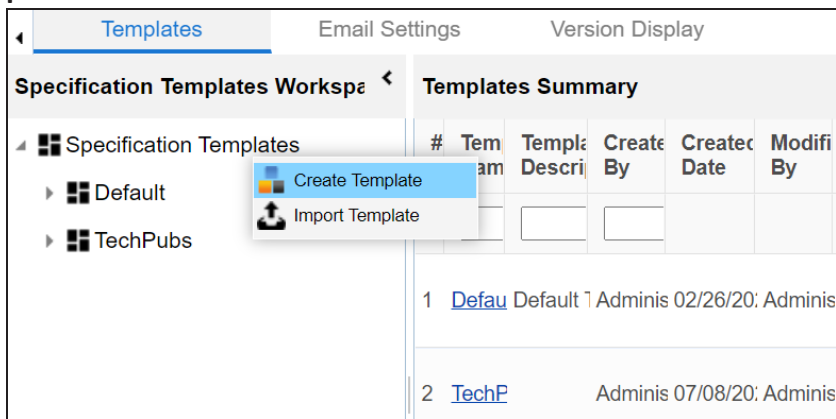
You can create customized requirement templates and use them to create requirement specifications.

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.

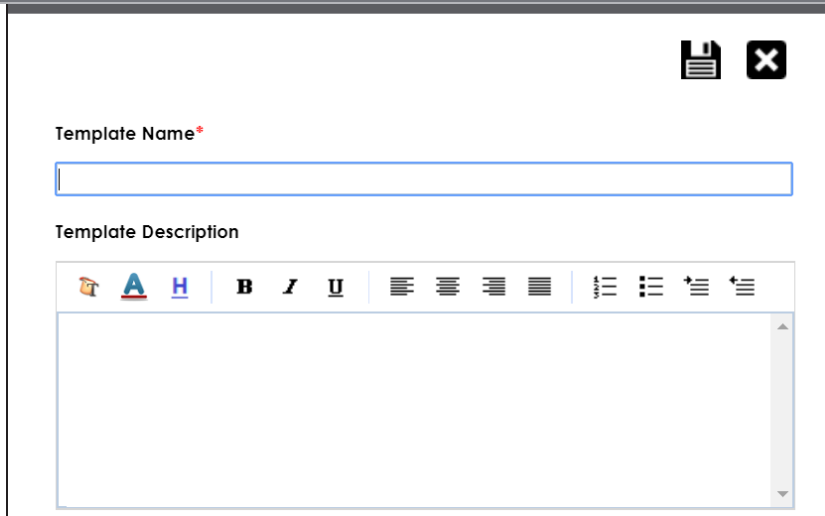
2. In the **Specification Templates Workspace** pane, right-click the **Specifications Templates** node.



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:

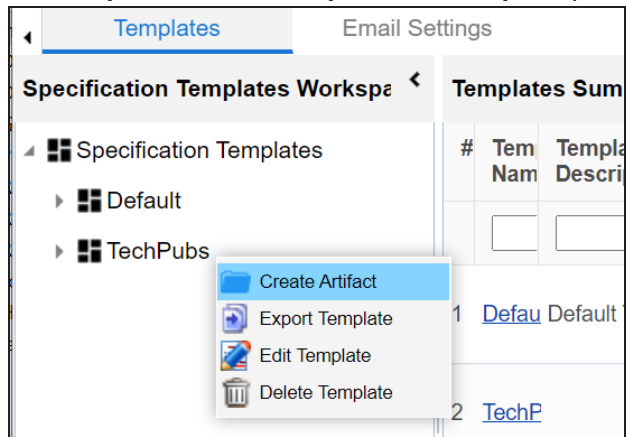
- [Add artifacts to the template](#)
- [Design custom forms for artifacts](#)
- [Manage artifacts](#)
- [Manage templates](#)

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

The Create Artifact page appears.

Create Artifact

Artifact Name*

Artifact Description

Tree Node Policy
Display Always

Support Documents Upload OFF

Enable Description OFF

Mail Comments

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:

Adding Artifacts to Templates

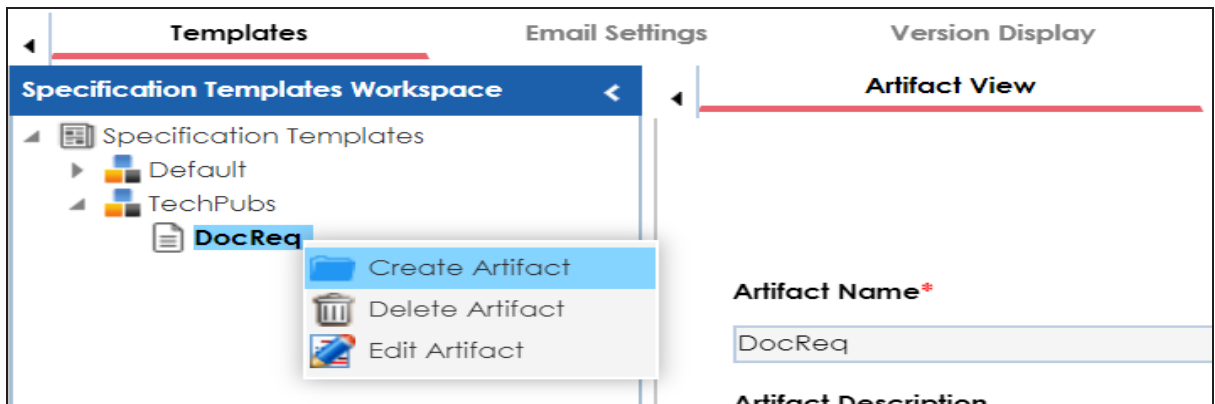
Field Name	Description
	Displays the artifact in the artifact tree. • Don't display for single child: Does not display the artifact in the artifact tree. • Display on multiple child nodes: Displays artifacts when it has more than one child artifacts.
Support Documents Upload	Enables the document upload 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.

Adding Artifacts to Templates

2. Enter the required fields and click **OK**.

Refer to the field description table above.

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

Templates		Email Settings	Version Display				
Specification Templates Workspace		Artifacts Details					
Specification Templates		Artifacts Listing					
Default		#	Artif Nam	Artifac Descri	Create By	Created Date	Modif By
TechPubs							
DocReq		1	DocRe		Adminis	07/15/20	Admini
SRSRequirements							

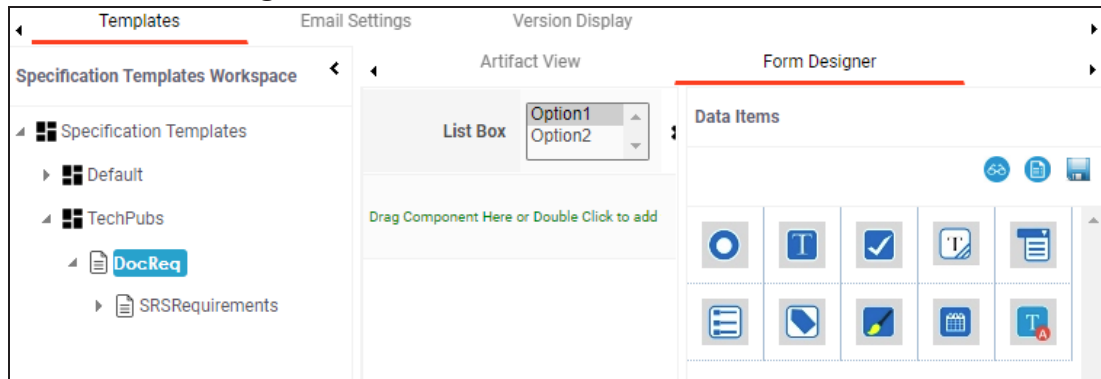
Once you have added an artifact to a template, you can [create custom forms](#) for the artifact.

Designing Forms

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

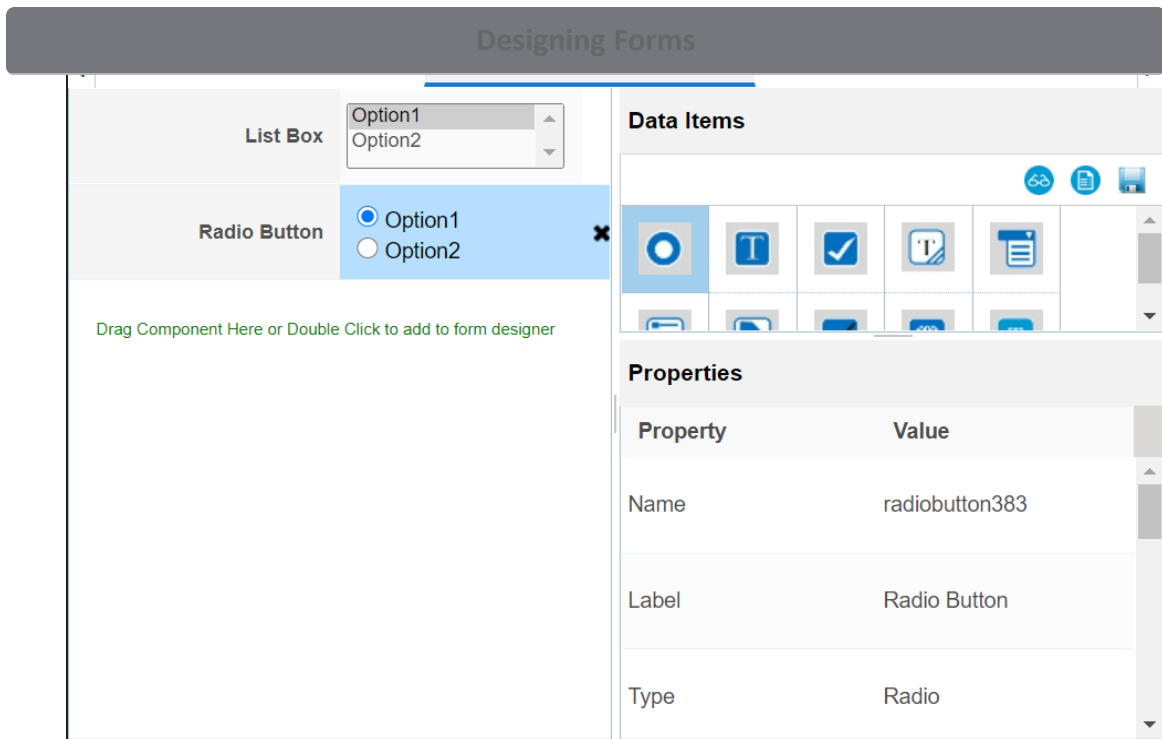
To design forms, follow these steps:

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.



 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 field. 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.

Designing Forms

Property	Description
	Select the Visible check box to make the field visible on the form.
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:

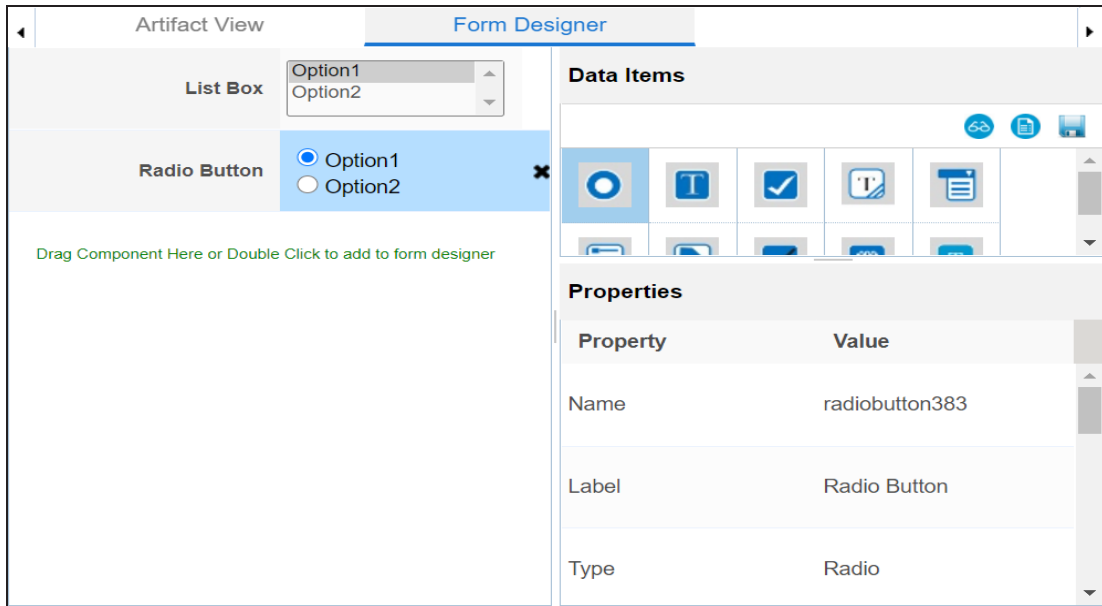
- Click  to view form properties
- Click  for preview

Designing Forms

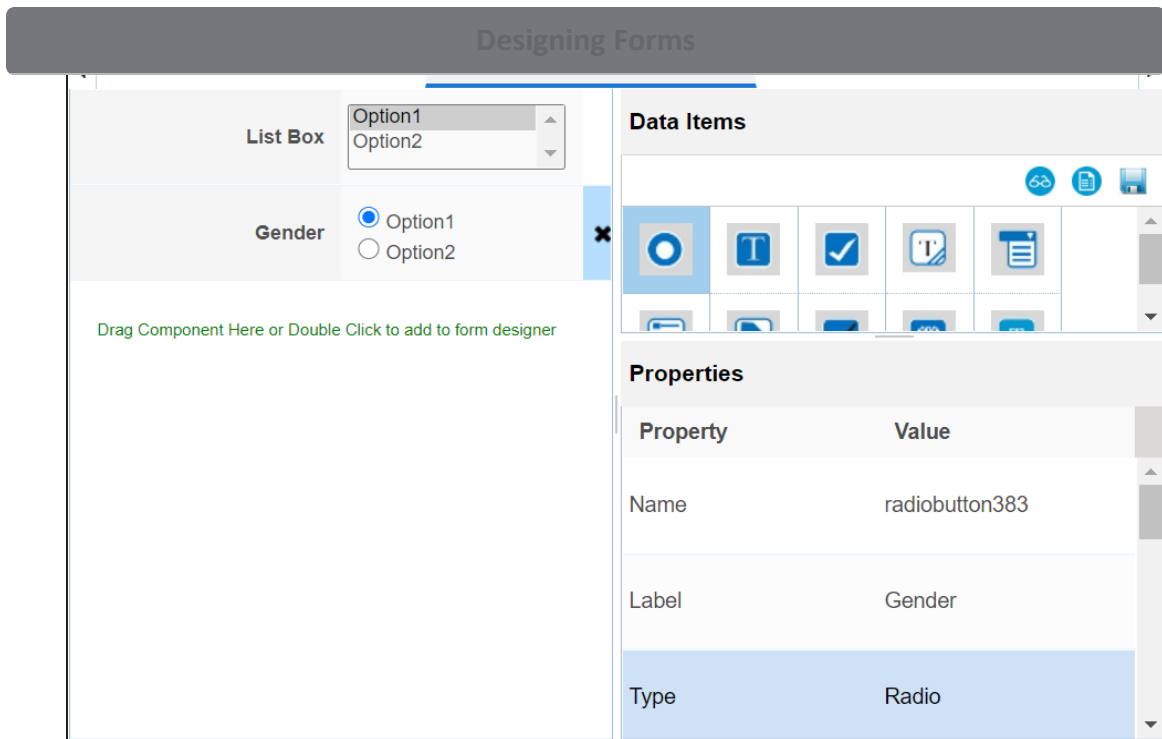
The Master Template Option is saved.

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

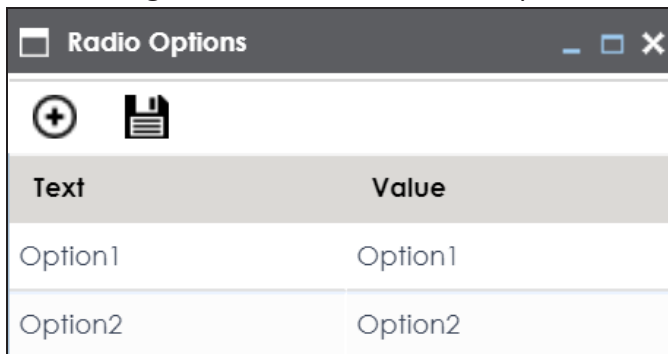
1. Double-click, or drag and drop the Radio Button icon from Data Items to the space provided to design the form.



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.



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

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

 	
Text	Value
Male	Option1
Female	Option2
Transgender	Option 3

- 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			

- Click .

The Master Template Option is saved.

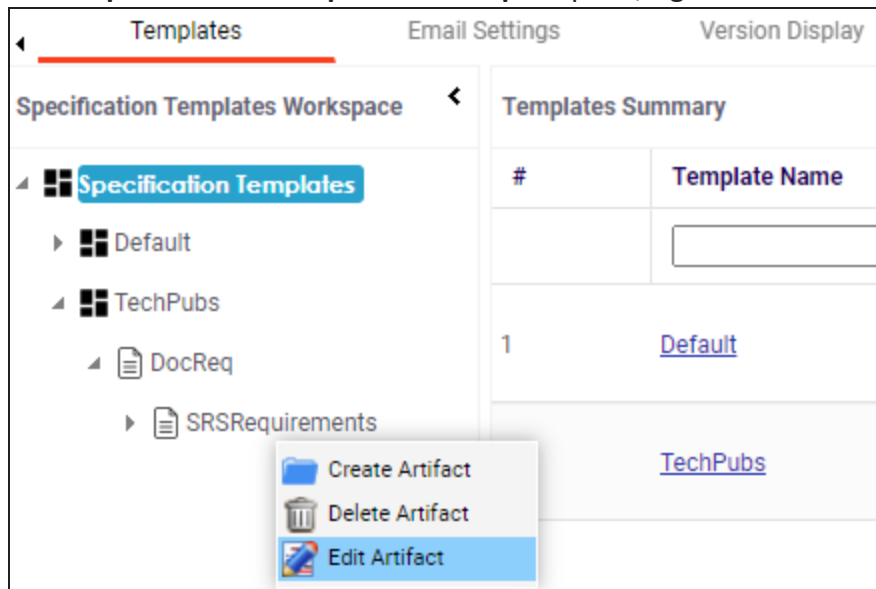
Managing Artifacts

Managing artifacts involves:

- Editing artifacts
- Deleting artifacts

To edit artifacts, follow these steps:

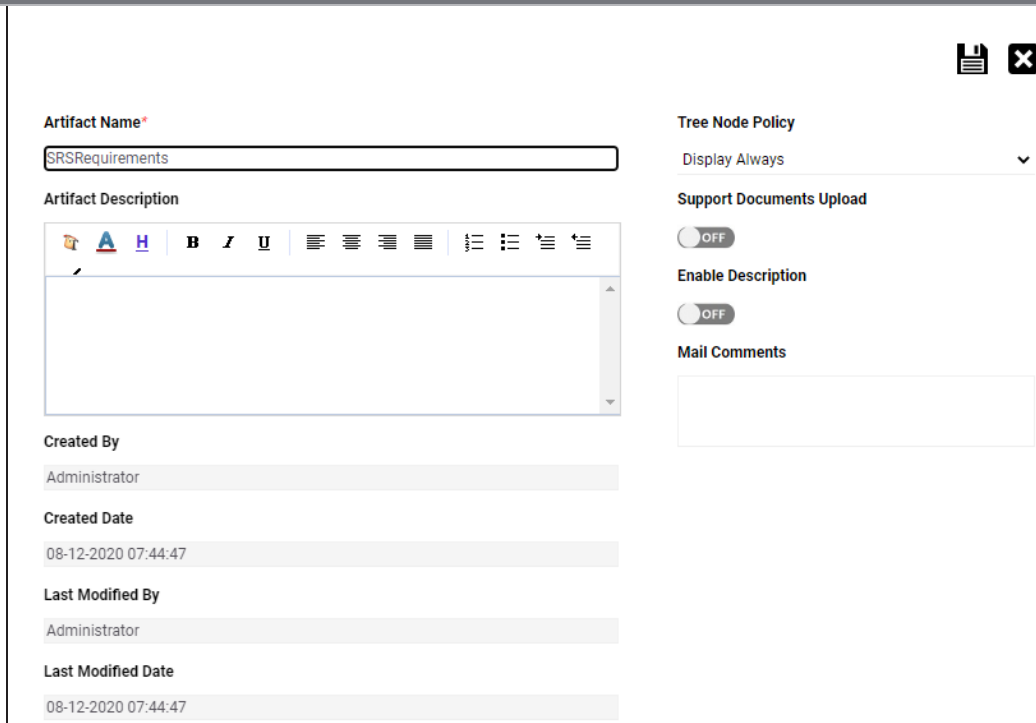
1. In the **Specification Templates Workspace** pane, right-click an artifact.



2. Click **Edit Artifact**.

The Artifact View tab appears in editable mode.

Managing Artifacts



The screenshot shows a web form for managing artifacts. At the top right are icons for saving (floppy disk) and deleting (X). The form is divided into two main sections. The left section contains: 'Artifact Name*' with a text input field containing 'SRSRequirements'; 'Artifact Description' with a rich text editor toolbar (bold, italic, underline, list, etc.) and a text area; 'Created By' with a dropdown menu showing 'Administrator'; 'Created Date' with a date/time field showing '08-12-2020 07:44:47'; 'Last Modified By' with a dropdown menu showing 'Administrator'; and 'Last Modified Date' with a date/time field showing '08-12-2020 07:44:47'. The right section contains: 'Tree Node Policy' with a dropdown menu showing 'Display Always'; 'Support Documents Upload' with a toggle switch set to 'OFF'; 'Enable Description' with a toggle switch set to 'OFF'; and 'Mail Comments' with a text input field.

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.

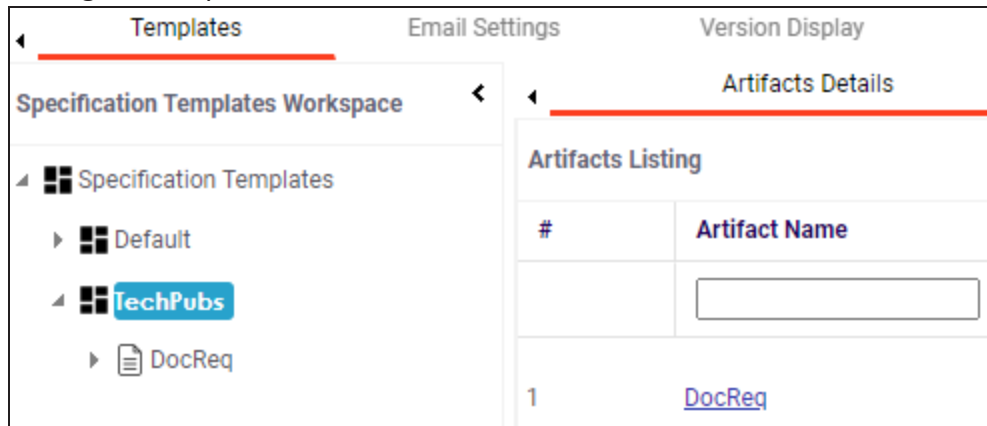
Managing Templates

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

Template Name *

Enable Email ☒

Trigger On
Specification

☐ Add ☐ Delete ☐ Edit ☐ Version ☐ Copy

Subject
Requirements Manager Specification Status - DO NOT REPLY

Enable Comments ☒

Comments
@comments@

Email Content

Hi,

This is a system generated email notification.

Action Performed: @ACTIONTYPE@ @ACTION@

Specification Details	
Name	@SpecificationName@
Id	@SpecificationId@
Version	@Version@
Project Name	@ProjectName@
Subject Name	@SubjectName@
Created By	@CreatedBy@
Created Date	@CreatedDate@
Modified By	@ModifiedBy@
Modified Date	@ModifiedDate@

- 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
Template Name	Specifies the name of the template. For example, Specification Email Template.
Trigger On	Specifies whether the email template is for Specification, Artifact, or Specification Artifact. Based on the selection, select the actions on which an email notification must be sent to project users. Actions can be Add, Delete, Edit, Version, or Copy.  Version and Copy actions are available only for Specification.
Enable	Switch Enable Email to ON to enable the template.

Configuring Email Settings	
Field Name	Description
Email	
Subject	Specifies the subject of the email notification. 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 (1/2)

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

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

Business Assets

BT Business Terms

T Test

BP Business Policies

BP Business Processes

CR Compliance Reports

BR Business Rules

ED erwin DM NSM

DN DM NSM Files

DA DS Agreements

I Issues

T Tags

SG Stewardship Goals

Add New

Asset Details

Catalog

Business Term

Name*

Business Terms

Title*

Business Term

Description

Business Terms Description

Color

#1C5FAB

FG Color

#FFFFFF

Documents Required

☒

Enable Asset

☒

Enable Definition

☒

Enable Sensitivity Fields

☒

Enable Scoring

☒

Enable Certification

☒

Enable Dashboard

☒

Display Order

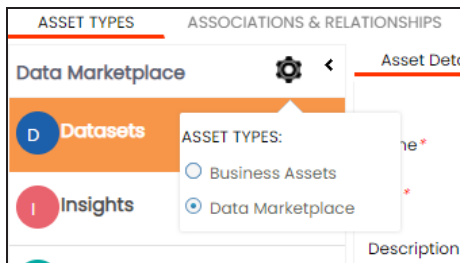
1.0

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.

The screenshot shows the 'Configuring Asset Types' window. On the left, the 'Business Assets' pane lists various asset types: Business Terms (selected), Test, Business Policies, Business Processes, Compliance Reports, Business Rules, erwin DM NSM, DM NSM Files, DS Agreements, Issues, Tags, and Stewardship Goals. An 'Add New' button is at the bottom. The right pane is titled 'Asset Details' and shows configuration for 'Business Terms'. Fields include Name (Business Terms), Title (Business Term), and Description (Business Terms Description). Below these are settings for Color (#1C5FAB), FG Color (#FFFFFF), and a list of checkboxes: Documents Required, Enable Asset, Enable Definition, Enable Sensitivity Fields, Enable Scoring, Enable Certification, and Enable Dashboard. The Display Order is set to 1.0, and an Image field shows 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. For more information, refer to the [Configuring Asset Form](#) topic.

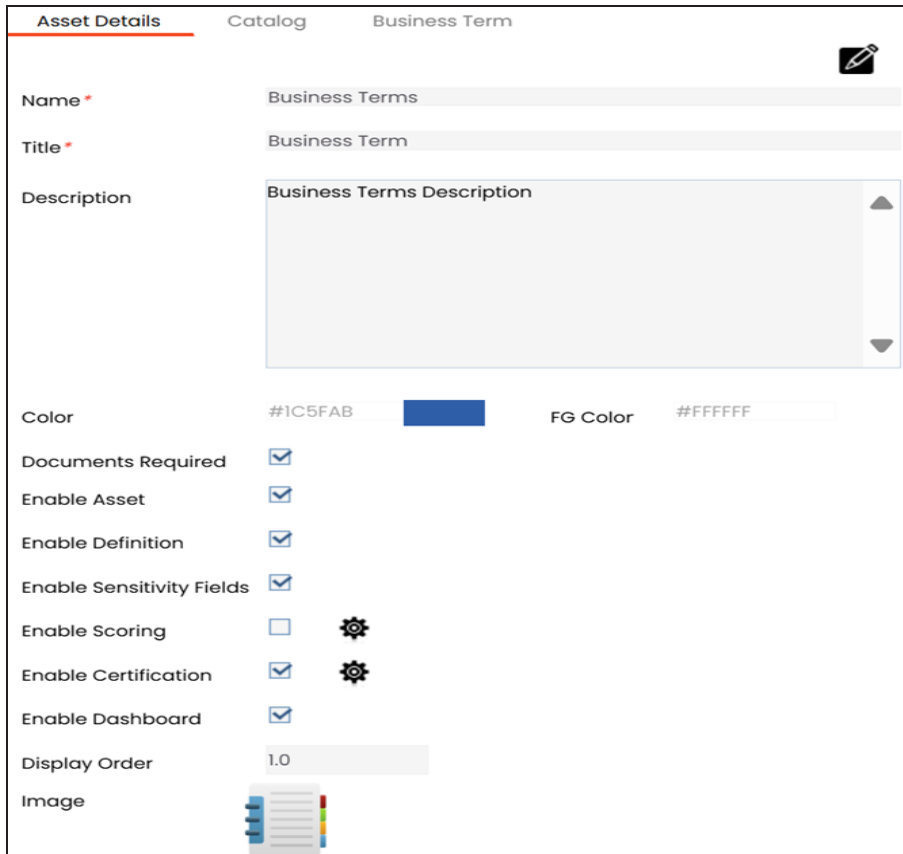
Configuring Asset Details

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' tab for a 'Business Term' asset. The form includes the following fields and controls:

- Name ***: Business Terms
- Title ***: Business Term
- Description**: Business Terms Description (text area)
- 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 Certification**: ☒ (with a gear icon)
- Enable Dashboard**: ☒
- Display Order**: 1.0
- Image**: 

An edit icon (pencil) is located in the top right corner of the form.

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 sens-

Configuring Asset Details

Field Name	Description
	itive. - 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 Certification	Specifies whether the certification is enabled in the Business Glossary Manager. To configure certification, click  . For more information, refer to the Configuring Maturity Level Certification 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 [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 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

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.



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.

Configuring Catalog Form

Property	Description
Field	Set the element label.
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.

- 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

[Creating Catalogs](#) topic.

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

The image shows a 'Configure Form' window with the following fields:

- Catalog Name:** A text input field.
- Catalog Type:** A dropdown menu with the text 'Select an option' and a downward arrow.
- Role:** A list box with a blue background, containing the items 'Data Steward' and 'ETL Developer'.

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.

Catalog Name

Catalog Type

Select an option ▼

Role

Data Steward
ETL Developer

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

2. Click **Configure**.

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

Combo Box Options

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.

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

Configuring Catalog Form

Combo Box Options

AddSaveDeleteImport Excel

Text	Value
Business	Business
Data	Data
Policies	Policies

Configure Form

Catalog Name

Catalog Type

Select an option

Select an optionBusinessDataPoliciesETC Developer

Role

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 configuration interface for a 'Business Term' asset. At the top, there are three tabs: 'Asset Details', 'Catalog', and 'Business Term', with the latter 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 top section, titled 'Field Controls', contains ten UI element icons arranged in two rows: Group, Text Box, Combo Box, List, Radio, Check Box, Number, Boolean, Date Picker, Category, and Rich Editor. The bottom section, titled 'Configure Form', is a large empty canvas 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

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.

Configuring Asset Form

Property	Description
Field	Set the element label.
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. 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.

Configuring Asset Form	
Property	Description
	Ensure the following: - Filter feature supports field types such drop-down, list, checkbox, radio, and boolean. - 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 [Business Glossary Manager](#) topic.

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

Configuring Asset 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 ▼

Configure Form

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

Combo Box Options

Add

Save

Delete

Import Excel

Text

Value

- Click **Add**.
Rows are added to the grid on the page.
- Double-click cells in the grid to edit them.
- 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

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.

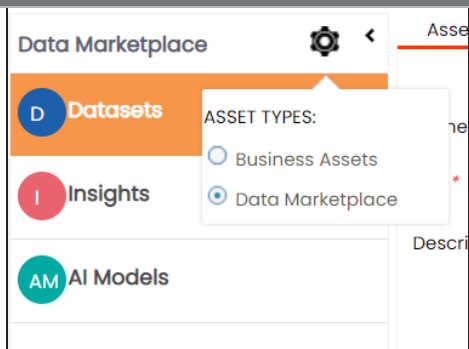
To add custom asset types, follow these steps:

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.

Adding Asset Types



Adding Asset Types

The New Asset Type page appears.

New Asset Type

Name*

Title*

Description

Color #F6C65B FG Color #FFFFFF

Documents Required ☐

Enable ☐

Enable Definition ☒

Enable Sensitivity Fields ☐

Enable Scoring ☐

Enable Certification ☐

Enable Dashboard ☐

Display Order

Image

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

Adding Asset Types

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.
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.
Enable Scoring	Specifies whether the scoring is enabled in the Business Glossary Manager.
Enable Certification	Specifies whether the certification is enabled in the Business Glossary Manager.
Enable Dash-	Specifies whether the dashboard is enabled in the Business Glossary

Adding Asset Types	
Field Name	Description
board	Manager.
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 [Business Glossary Manager](#) topic. Also, refer to [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**.

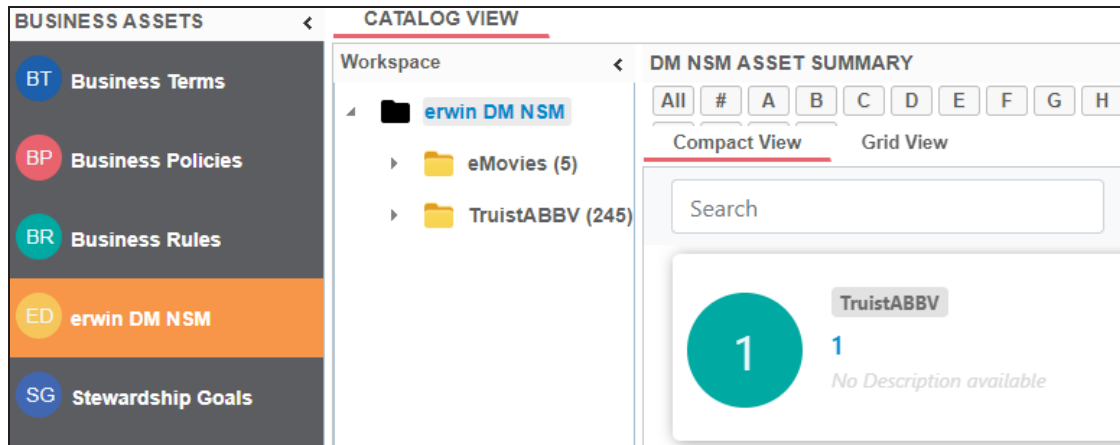
The corresponding settings appear in the right pane.

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)**, 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

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				

The Add Association page appears.

Add Association

Save Cancel

Source Asset Type*

Select Source Asset Type

Target Asset Type*

Select Target Asset Type

Description

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Undo, Redo.

Text area for description.

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

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.

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> .

Configuring Associations and Relationships

Field Name	Description
Description	Enter a description of the association.
Display Type	Select a relationship notation.
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

The Data Value Score is a single metric that reflects the overall business value of a data asset. It helps you quickly assess the usefulness and impact of a dataset based on multiple contributing factors.

Parameters

The score is calculated based on the following parameters:

- Data Quality Score (DQ Score)
- User ratings
- Completeness
- Timeliness
- Lifecycle
- Scarcity
- Popularity
- Relevance
- Authorized source

Customizing Parameter Weights

You can assign a custom weight to each parameter based on its importance in your organizational context. Prioritize the parameters that contribute most to the value of the data asset.

To ensure accurate scoring and consistent evaluation:

- Total weight must equal 100%
- Final score is a weighted average: The final score is calculated by multiplying each parameter's score by its assigned weight and summing the results.

Data Value Score Calculation

Each parameter is scored on a standardized scale (0–100). The final Data Value Score is calculated as a weighted average, based on the weights you configure.

$$\text{Data Value Score} = (\text{Parameter}_1 \text{ Score} \times \text{Weightage}_1) + (\text{Parameter}_2 \text{ Score} \times \text{Weightage}_2) + \dots + (\text{Parameter}_N \text{ Score} \times \text{Weightage}_N)$$

Configuring Data Value Score

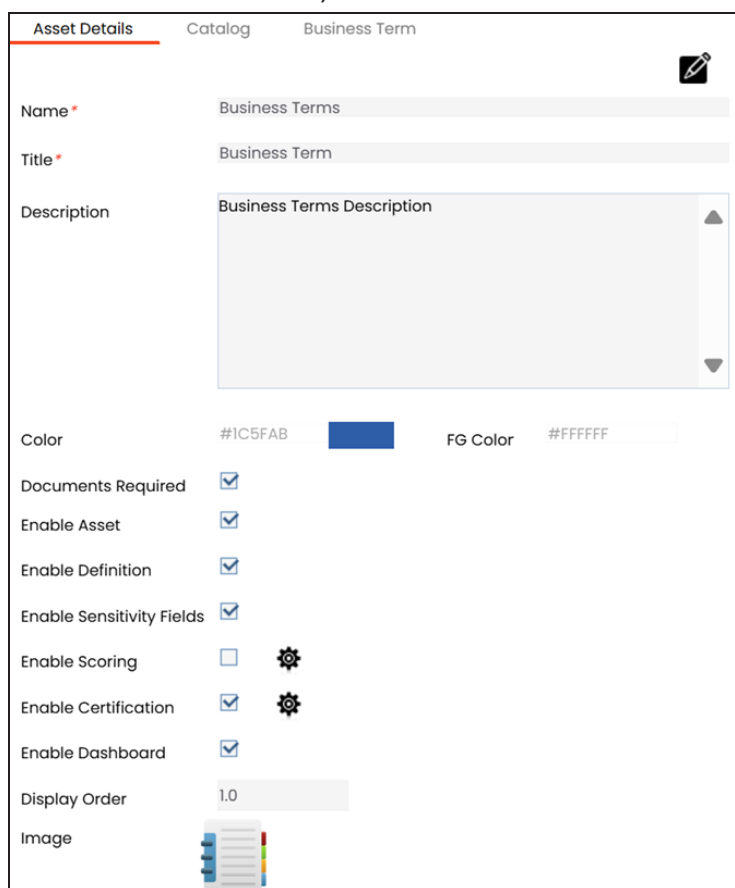
You can configure data value scoring for business assets such as business terms, business rules, and business policies, and data marketplace assets such as datasets, AI models, and data products.

This topic walks you through the steps of configuring data value scoring for the selected asset type. For example, Business Terms.

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

Configuring Data Value Score

2. On the Asset Details tab, click .



Asset Details Catalog Business Term

Name * Business Terms

Title * Business Term

Description Business Terms Description

Color #1C5FAB FG Color #FFFFFF

Documents Required ☒

Enable Asset ☒

Enable Definition ☒

Enable Sensitivity Fields ☒

Enable Scoring ☐ ⚙

Enable Certification ☒ ⚙

Enable Dashboard ☒

Display Order 1.0

Image 

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

Scoring is enabled.

3. To configure scoring, click .

The Configure Scoring pane appears.

Configuring Data Value Score

Configure Scoring

Score Name *

Business Term Score

Score Parameters and weightages

DQ Score	%	User Ratings	%	Asset Completeness	%
20		10		20	
Timeliness	%	Lifecycle	%	Scarcity	%
5		5		5	
Popularity	%	Relevance	%	Datasource	%
5		15		15	

Score Classification

key	value	%
GOLD	100	
key	value	%
SILVER	70	
key	value	%
BRONZE	30	

Enable Scoring as:
☒ Key
☐ Value
☐ Both

- 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 percentage based on the asset's Data Quality (DQ) Score. It is automatically calculated if the associated tables or columns have been profiled and include a DQ score. This value represents the overall average DQ score of all linked tables and columns.

Configuring Data Value Score

Field Name	Description
User Ratings	Specifies the percentage based on the overall average of user ratings for the asset.
Asset Completeness	Specifies the percentage based on the completeness of assets. It is automatically calculated based on the following components where each component contributes a fixed percentage to the overall score: • Definition or Description: 20% • Tags: 15% • Governance Responsibilities: 15% • SDI Classification: 15% • Other Associated Assets: 15% • At least one Business Term association: 20%
Timeliness	Specifies the percentage based on how recent asset's data is. It is manually set based on selected value at the asset level. • Stream: 100% • Daily: 80% • Weekly: 60% • Monthly: 40% • Yearly: 20%
Lifecycle	Specifies the percentage based on asset's lifecycle stage. This value is manually set according to the selected stage at the asset level: • Less than 6 months: 10% • 6 months to 1 year: 25% • 1 to 3 years: 50% • 3 to 10 years: 75% • More than 10 years: 100%

Configuring Data Value Score

Field Name	Description
Scarcity	Specifies the percentage based on how unique an asset is within the data catalog. You can manually set the value from 0 to 100.
Popularity	Specifies the percentage based on the number of views the asset has received. A total of 300 views corresponds to a score of 100. The score is automatically calculated based on the asset's view count and its relative weightage.
Relevance	Specifies the percentage based on an asset's association with one or more business processes. A score of 100% is assigned if at least one business process is associated with the asset.
Datasource	Specifies the percentage based on an asset's associations with environments, tables, or columns of environments that have the Authorized Datasource option switched on in the Metadata Manager module.
Keys	Specifies the percentage ranges for each classification level • Bronze: Indicates lowest value assets. For example, when the value is set to 30, the percentage score from 0 to 30 is configured as Bronze. • Silver: Indicates mid-value assets. For example, when the value is set to 70, the percentage score from 31 to 70 is configured as Silver. • Gold: Indicates highest value assets. For example, when the value is set to 100, the percentage score from 71 to 100 is configured as Gold.
Enable Scoring as	Specifies the scoring mode • Key: Displays score using the key classification. For example, Gold, Silver, and Bronze. • Value: Displays the numerical score • Both: Displays both key and score

Configuring Data Value Score



The total weight must equal 100. To exclude a parameter from scoring, set its weight to 0%.

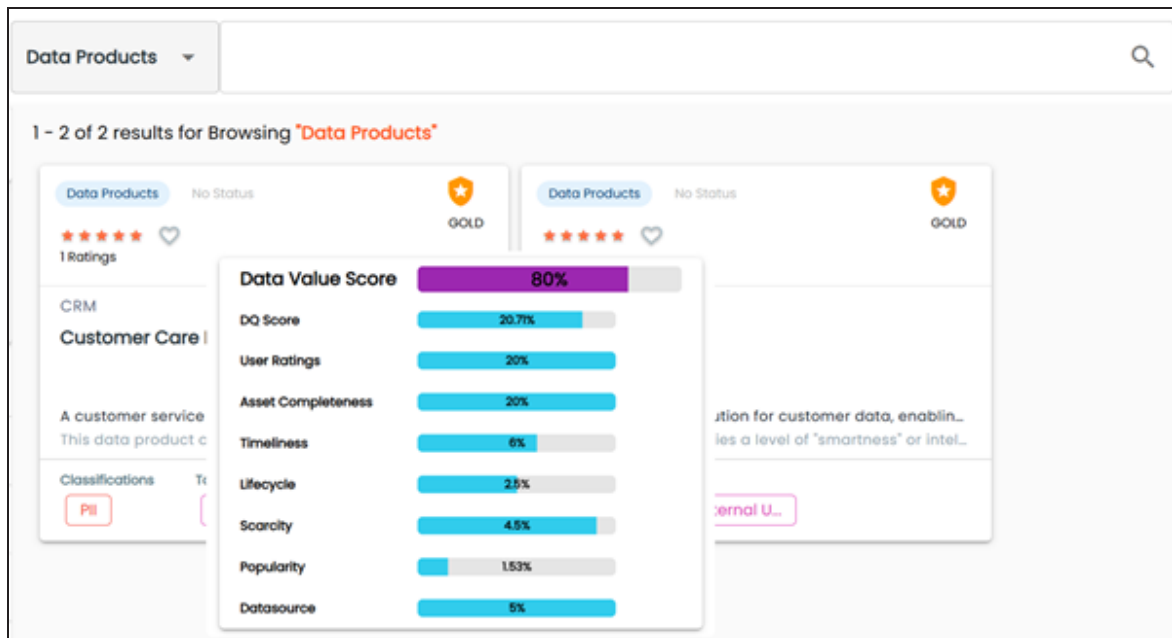
5. Click .

6. Click .

To discard your changes, click .

The data value score is available in the Business Glossary Manager, Data Marketplace, and Discover Assets modules.

For example, the asset displayed in the following image, of type Data Products, has a score of 80% and is rated Gold.



Additionally, on the <Asset_type> tab, you can include or exclude the Timeliness, Lifecycle, and Scarcity properties by switching the Published option to ON or OFF on the Configure form.

Configuring Data Value Score

EditDelete

Field Controls

Group

Text Box

Combo Box

List

Radio

Check Box

Number

Boolean

Date Picker

Configure Form

Timeliness

Select an option

▼

Lifecycle

Select an option

▼

Scarcity

0

Text Box

Configure Form

Property	Value
Published	ON
Field	Include Sensitive Information
Type	Label
Description	

These properties must not be deleted. If they are removed, the Data Value score will not be displayed.

Configuration Guide 15.0

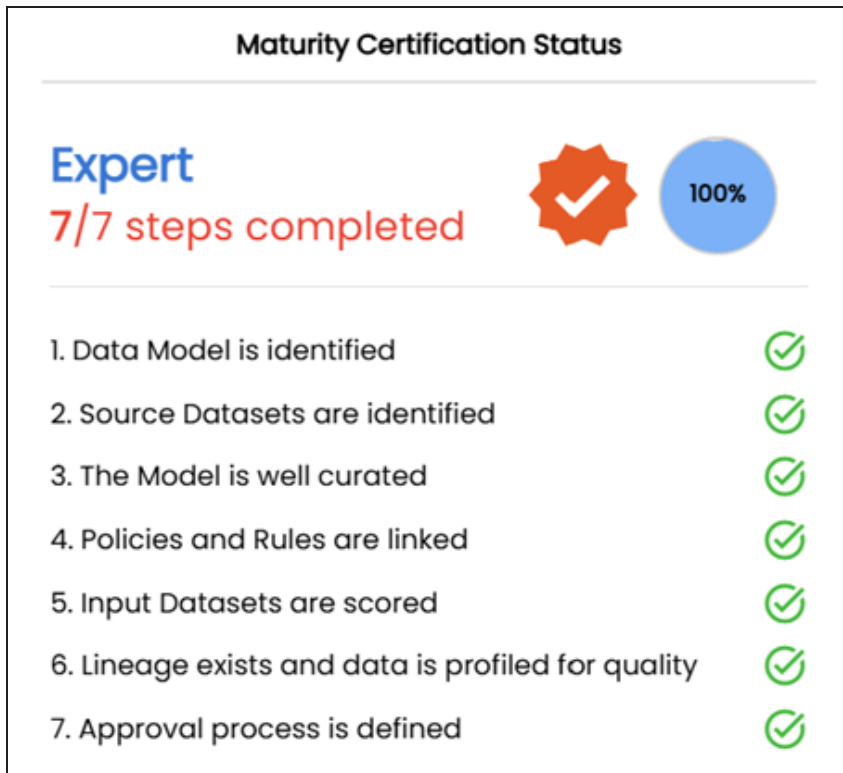
133

Configuring Maturity Level Certification

The Maturity Level Certification feature lets you configure up to seven optional validations within a workflow. These validations contribute to the asset's overall certification score. The final score is based on the number of successfully completed validations and determines the asset's Maturity Certification Status.

Validations

The seven validations used to calculate the maturity level certification score are displayed in the following image.



Maturity Certification Rating

The overall maturity certification rating is based on the number of validations that are enabled and validated by the system.

Overall Score (%) = (Number of checks validated by the system ÷ Number of validations enabled) × 100

Configuration Maturity Certification

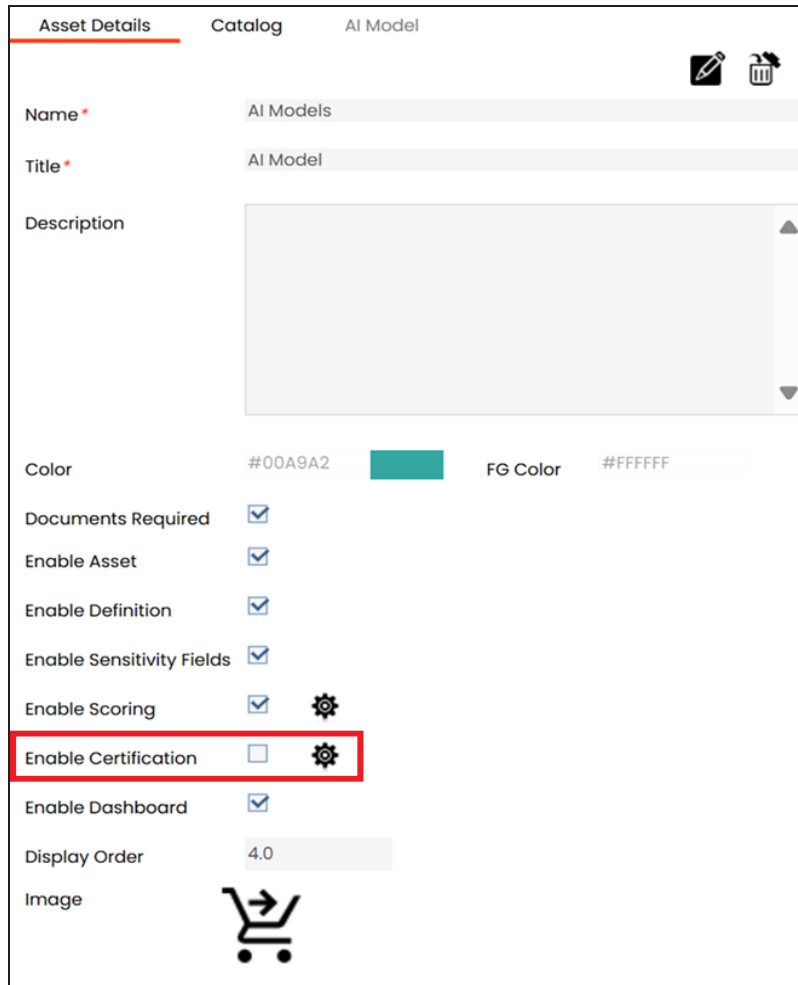
You can configure Maturity Certification for business assets such as business terms, business rules, and business policies, and data marketplace assets such as datasets, AI models, and data products. You can switch on or switch off each validation through administrative settings.

This topic walks you through the steps of configuring maturity certification for a selected asset type. For example, AI Models.

To enable and configure maturity certification, follow these steps:

Configuring Maturity Level Certification

2. On the Asset Details tab, click .



The screenshot shows the 'Asset Details' tab for an 'AI Model'. The form includes fields for Name, Title, and Description. Below these are color selection options (Color: #00A9A2, FG Color: #FFFFFF) and a list of checkboxes for enabling various features. The 'Enable Certification' checkbox is highlighted with a red box, and its gear icon is visible. The 'Enable Scoring' checkbox is also checked and has a gear icon. The 'Enable Dashboard' checkbox is checked. The 'Display Order' is set to 4.0. An 'Image' field with a shopping cart icon is at the bottom.

Field	Value
Name *	AI Models
Title *	AI Model
Description	
Color	#00A9A2
FG Color	#FFFFFF
Documents Required	☒
Enable Asset	☒
Enable Definition	☒
Enable Sensitivity Fields	☒
Enable Scoring	☒ 
Enable Certification	☐ 
Enable Dashboard	☒
Display Order	4.0
Image	

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

The certification is enabled.

3. To configure certification, click .

The Maturity Level Configuration pane appears.

Configuring Maturity Level Certification

Maturity Level Configuration ✓ ✕

Levels Configuration

☒

 Model

☒

 Catalog

☒

 Curate

☒

 Govern

☒

 Score

☒

 Observe

☒

 Shop

Level Classification

key Expert	value 100	%
key Intermediate	value 70	%
key Beginner	value 30	%

4. Switch the options on or off to select key criteria for calculating the maturity level of the selected asset type based on your requirements. Refer to the following table for field descriptions.

Field Name	Validation	Description
Model	Data Model is identified.	Validates whether a data model is associated with the asset. At least one erwin data model, with the database type set to erwin or erwin9 in Metadata Manager, must be

Configuring Maturity Level Certification

Field Name	Validation	Description
		associated with the asset. The system checks whether the asset is directly associated with a data model or indirectly associated through an intermediate asset—such as a data product or a dataset—that is linked to an erwin data model.
Catalog	Source datasets are identified.	Validates whether a datasource is associated with the asset. At least one datasource or environment in Metadata Manager must be associated with the asset. The system checks whether the asset is directly associated with a datasource or an environment or indirectly associated through an intermediate asset—such as a data product or a dataset—that is linked to a datasource or an environment.
Curate	The model is well curated.	Validates whether the asset has a definition, is classified or tagged, and has a governance stakeholder assigned.
Govern	Policies and Rules are linked.	Validates whether business rules and business policies are associated with the asset. At least one business policy or business rule must be assigned to the asset.
Score	Input datasets are scored.	Validates whether the associated datasets or data products have been scored for data quality.
Observe	Lineages exist and data is profiled for quality.	Validates whether lineages exist, and data has been profiled for data quality. At least one lineage path must exist for the tables, columns, or environments that the AI model is connected to—either directly or through an intermediate asset such as a Dataset or Data Product.
Shop	Approval process is defined.	Validates whether assets have passed through an approval workflow. A workflow process must be associated with the asset, and the asset must be published.
Keys		Specifies the percentage ranges for each classification

Configuring Maturity Level Certification		
Field Name	Validation	Description
		level • Beginner: Indicates the Beginner Level classification, representing the lowest value assets. For example, when the value is 30, the percentage score from 0 to 30 is configured as Beginner. • Intermediate: Indicates the Intermediate level classification, representing moderate value assets. For example, when the value is 70, the percentage score from 31 to 70 is configured as Intermediate. • Expert: Indicates the Expert level classification, representing the highest value assets. For example, when the value is 100, the percentage score from 71 to 100 is configured as Expert.



You can rename classification levels and modify values as needed.

5. Click .

6. Click .

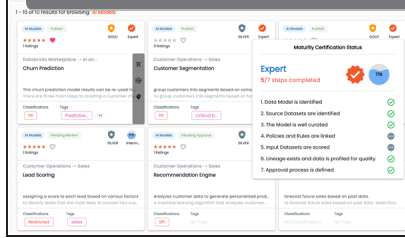
Maturity Level is available in the Business Glossary Manager, Data Marketplace, and Discover Assets modules.

To discard your changes, click .

For example, the Customer Segmentation AI model has all seven validations enabled, five validations completed, and a 71% score. This score translates to an Expert rating, based on how the level classifications are configured.

If you enable only five validations, the Maturity Certification Status list displays those five validations. A green check mark indicates completed validations, while incomplete ones remain without the check mark.

Configuring Maturity Level Certification



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.

ASSET TYPES	ASSOCIATIONS & RELATIONSHIPS	OTHER CONFIGURATIONS
☐ Enable usage on Business Term Classification Reference (+) Derived Transactional Operational	☐ Enable usage on Business Term Data Collection Type Report (+) Report Section Screen Dashboard Extract API	☐ Enable usage on Business Term Meaning Category Type Conceptual Logical Physical
☐ Enable usage on Business Term Data Object Type Business Data Element (+) Data Collection Physical Data Element	☐ Enable usage on Business Rule Criticality High (+) Low Medium	Dashboard Visibility ☒ 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.

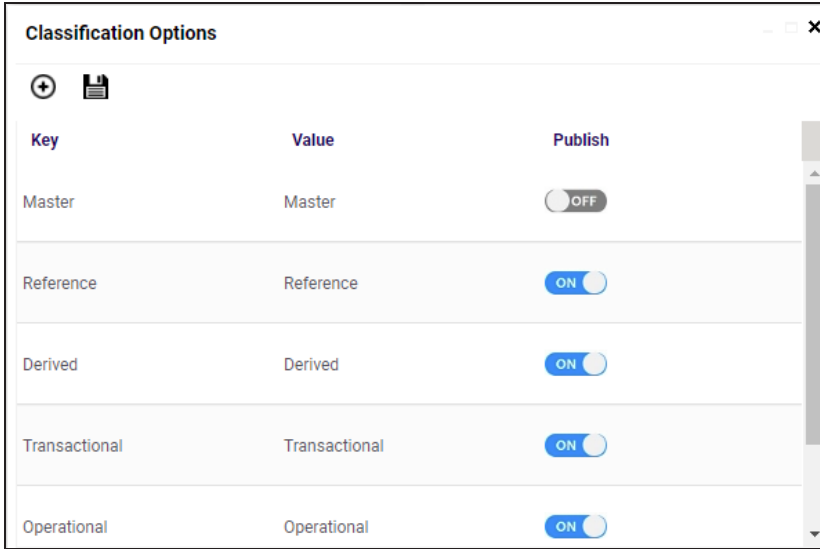
Edit Property Options

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.

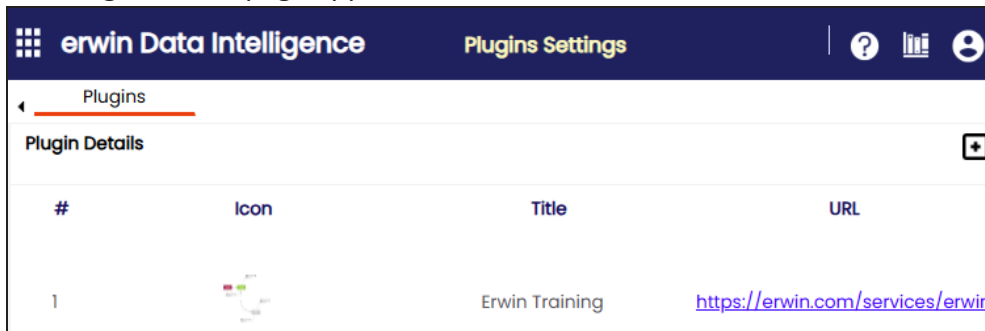
Configuring Plugins

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.

Configuring Plugins

Field Name	Description
	- Choose Private to restrict its visibility to yourself. - 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.
- [Data Profiling 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

agement), 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 open. The 'Email Settings' tab is selected. The page contains several configuration fields for email settings, including 'Admin Email Id', 'Admin Email User Name', 'Admin Email SMTP Host', 'Admin Email Use SSL', 'Admin Email Use TLS', and 'Admin Email SMTP Port'. There are also checkboxes for 'Enable Authentication', 'Use sendmail Command', and 'Use mailx Command'. The 'Admin Email Id' and 'Admin Email User Name' fields are both set to 'namita.yellowandgreens@gmail.com'. The 'Admin Email SMTP Host' is set to 'smtp.gmail.com'. The 'Admin Email Use TLS' checkbox is checked, with a note indicating the default port is 587. The 'Admin Email SMTP Port' is set to 587.

Field	Value
Admin Email Id*	namita.yellowandgreens@gmail
Admin Email User Name*	namita.yellowandgreens@gmail
Admin Email SMTP Host*	smtp.gmail.com
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	☐

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 displays the 'Email Settings' tab within the 'Miscellaneous Configurations' section. The interface includes a sidebar with tabs for 'Email Settings', 'Notifications', 'Sensitivity Classification', 'Metadata Asset Settings', 'Workflow Settings', and 'Language Settings'. The main content area is divided into two columns. The left column contains radio buttons for 'Use SMTP Settings' (selected), 'Use sendmail Command', 'Use mailx Command', and 'Use Custom Command', each with a 'Configure' button. The right column contains input fields for 'Admin Email Id*', 'Admin Email SMTP Host*', 'Admin Email Use SSL' (with a note 'Note: default port - 465'), 'Admin Email Use TLS' (with a note 'Note: default port - 587'), and 'Admin Email SMTP Port*' (set to 587). There is also an 'Enable Authentication*' checkbox.

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

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

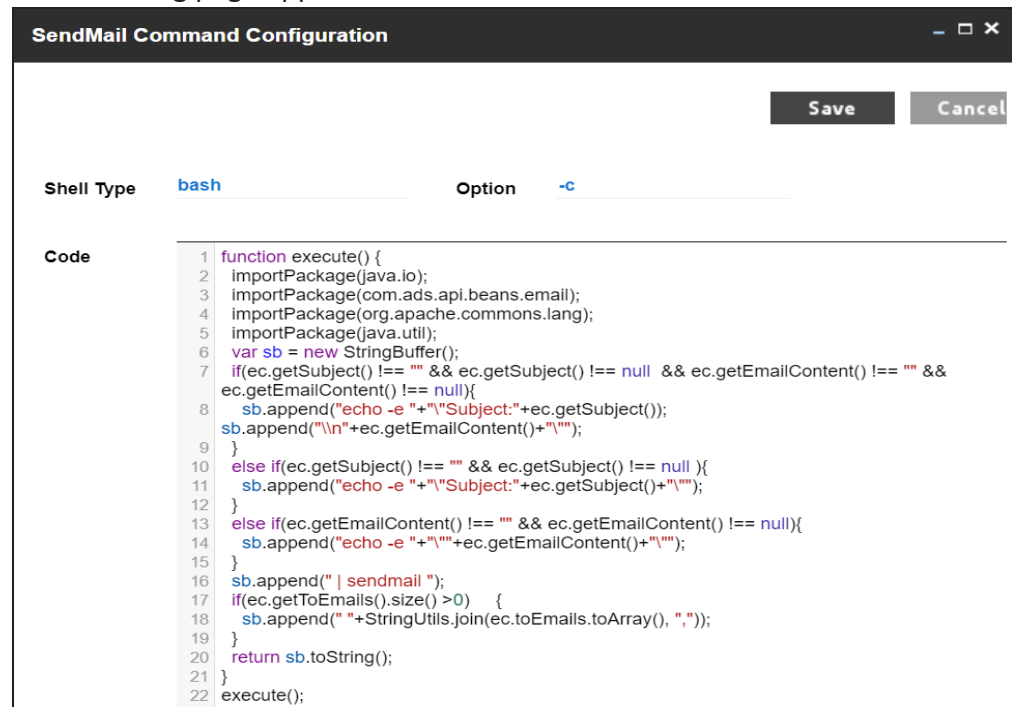
Configuring Email Settings

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:

2. Click **Configure**.

The MailX Command Configuration page appears.

MailX Command Configuration

Save Cancel

Shell Type: Option:

```

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.

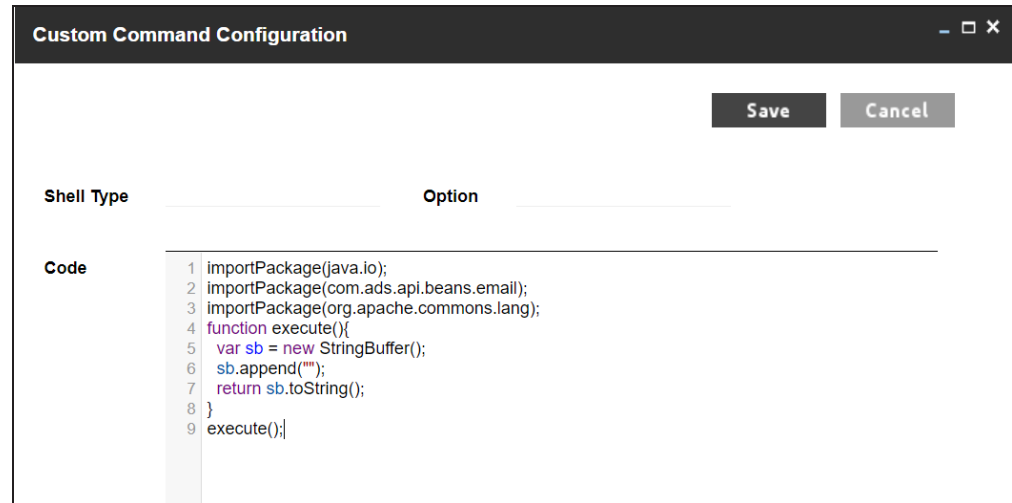
Use Custom Command

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:

2. Click **Configure**.

The Custom Command Configuration page appears.



Custom Command Configuration

Save Cancel

Shell Type _____ Option _____

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

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.

- 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.

The success message validates your email settings.

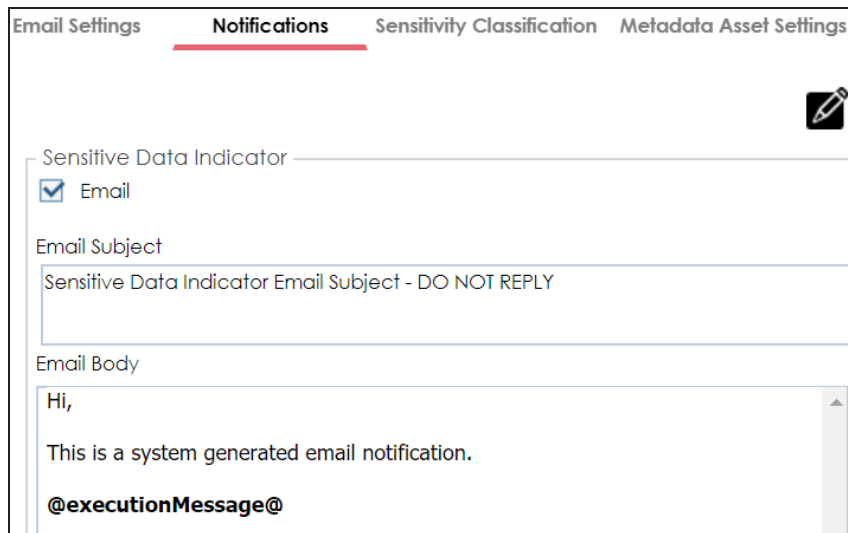
Configuring Sensitivity Update Notifications

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@'. There is an edit icon (pencil) 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.

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

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

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, refer to the [Accessing erwin Data Quality Configuration Details](#) section.

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

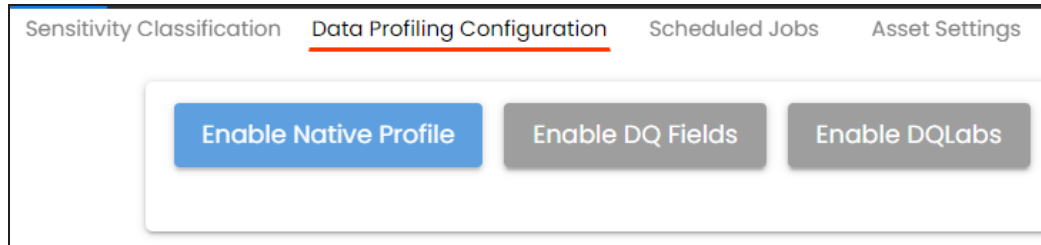
To configure erwin Data Quality, follow these steps:

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 an erwin Data Quality profile to sync erwin DI and erwin Data Quality and profile data.
- **Enable DQ Fields:** Use this option to display only the selected data quality parameters 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.

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

Field Name	Description
DQ Version	Specifies the version of Data Quality. For example, 2.x, 3.x.

Configuring Data Profiling

Field Name	Description
	 Data Quality version 3.x supports DI version 15.1 and above.
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

- Click .

The erwin Data Quality configuration is saved.

To test the configuration, click . 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 and views in the erwin Data Quality and [scheduling a erwin Data Quality job](#).

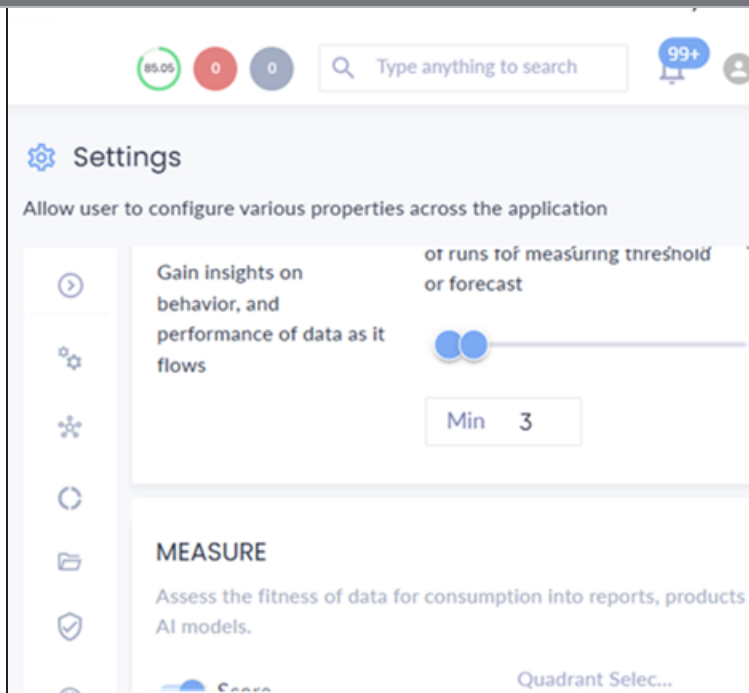
Accessing erwin Data Quality Configuration Details

To access Client ID and Client Key in your erwin Data Quality instance, follow these steps:

- Log in to erwin Data Quality.
The erwin Data Quality instance opens.
- On the app menu, click  > **Settings**.

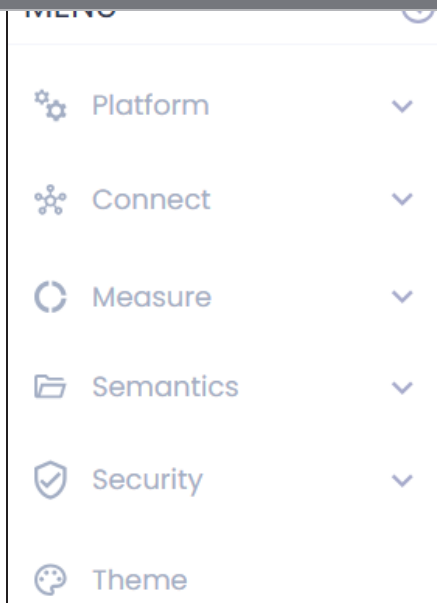
The Settings page appears.

Configuring Data Profiling

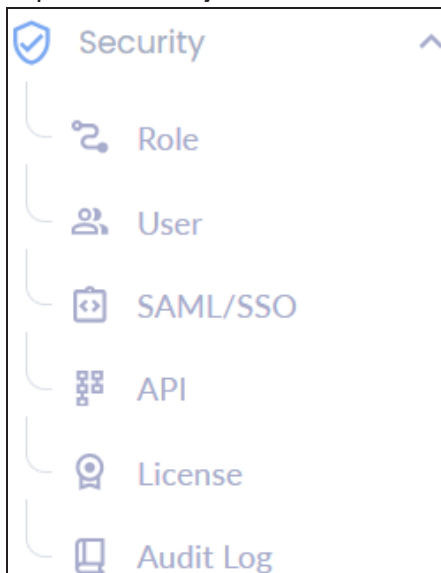


3. Click  to expand menu.

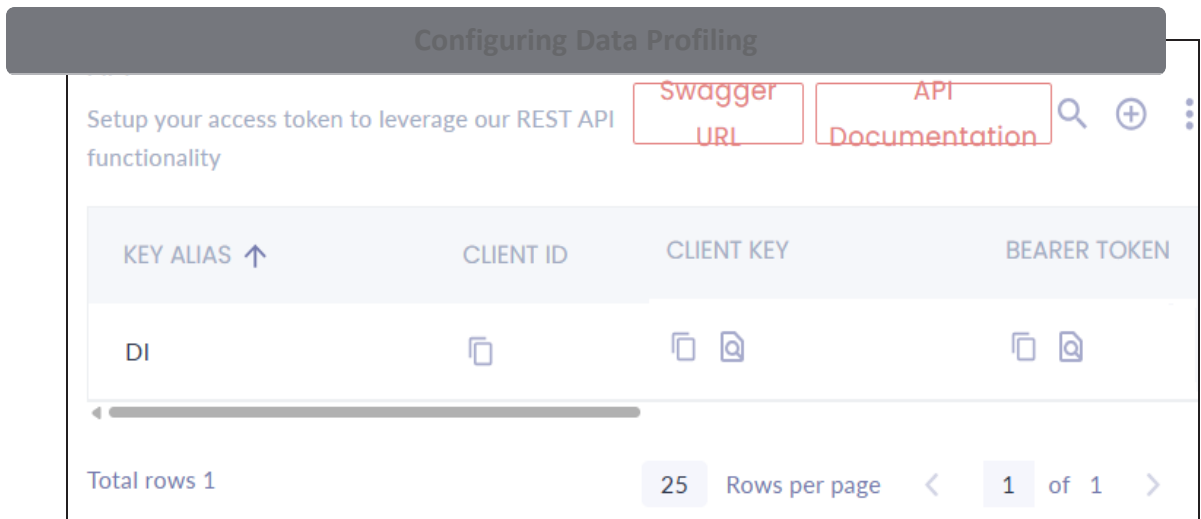
The menu expands and displays additional options.



4. Expand **Security** and click **API**.



The API section appears and displays the Client ID and Client Key.



5. Click  to copy them.

6. Paste these values into the [Enabling DQ Labs](#) section.

You can also create a new API key to generate a Client ID and Client Key.

To create a new API key, follow these steps:

1. Click .

The ADD API KEY dialog box opens.

2. In the Name field, enter a name for the API key.

3. Select the required option from the Expired In dropdown.

Configuring Data Profiling

A new API key is created, and the Client ID and Client Key are generated.

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' radio button. 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.

datory. 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.

To view the details of the jobs run by all users, click on the **Activity Log** tab. The **Activity Log** includes 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.

Metadata Assets		
	Display Color	Display Label
System	#26276D	System
Environment	#F6C65B	Environment
Table	#F79548	Tables
Column	#92d050	Columns

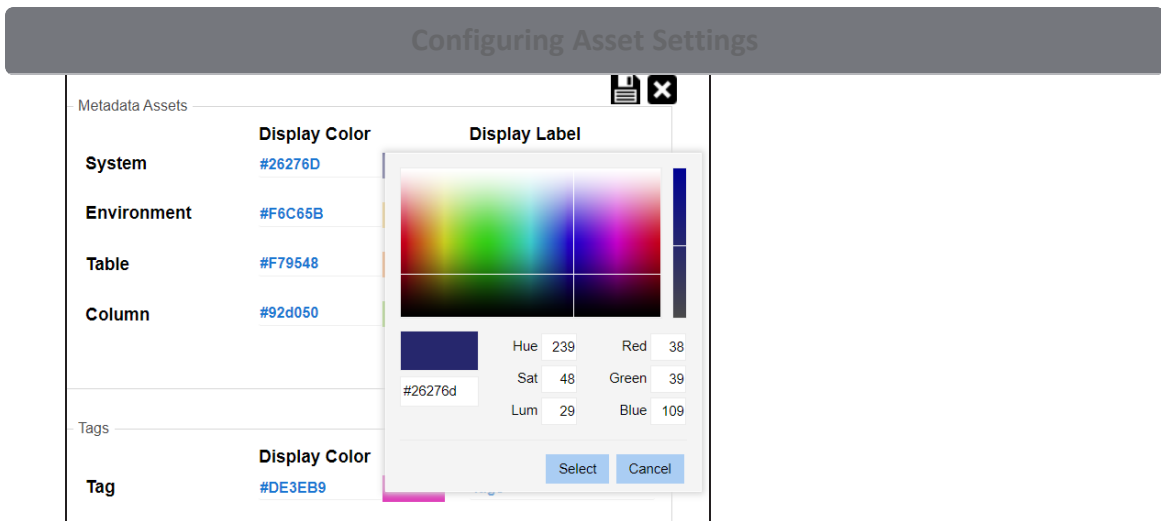
Tags		
	Display Color	Display Label
Tag	#DE3EB9	Tags

Dashboards

Enforce User Assignment In Metadata Manager ☐ OFF

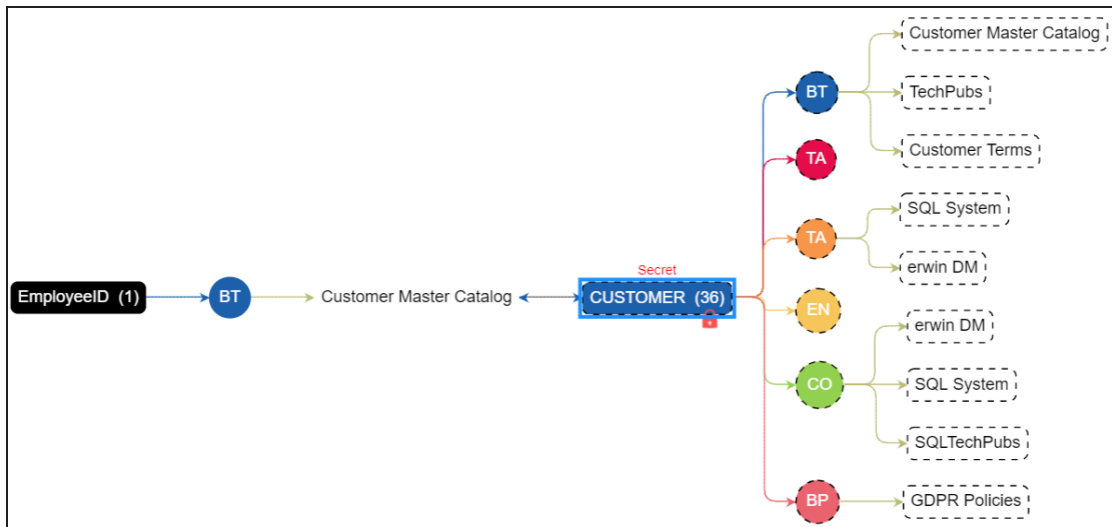
Enforce User Assignment In Business Glossary Manager ☐ OFF

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**.



4. Next, under the Metadata Assets and Tags section, click the required display label box. Then, enter a label.
5. 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

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), 'Workflow Settings', and 'Lan'. Below the navigation bar, there are two tabs: 'Mappings' (selected) 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 'Important Note*' with a warning triangle icon, stating: '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

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' (selected), 'Workflow Settings', and 'Lan'. Below the navigation bar, there are two tabs: 'Mappings' (selected) 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 settings:

- # 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.

Scheduling Clean up Jobs

Field Name	Description
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. ▪ 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 Lan

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

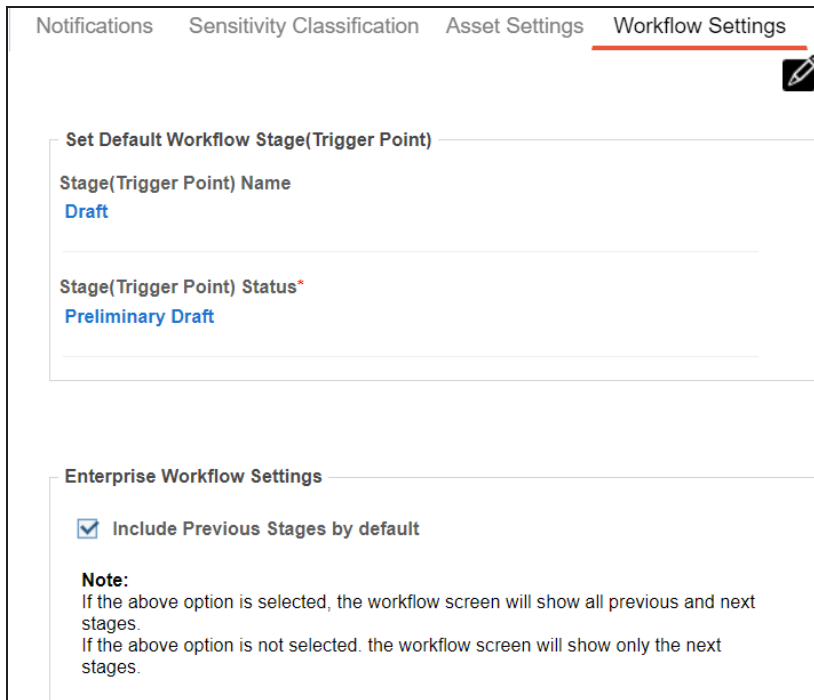
You can configure the following on the Workflow Settings tab:

- **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.



2. Click .
3. Use the following sections:

Set Default Workflow Stage(Trigger Point)

Configuring Workflow Settings

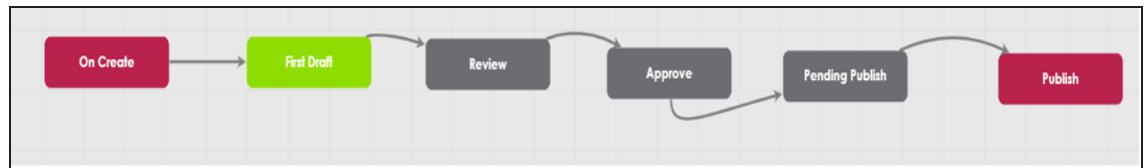
applicable to all workflows. By default, both, the stage name and status, are set to Draft.

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.

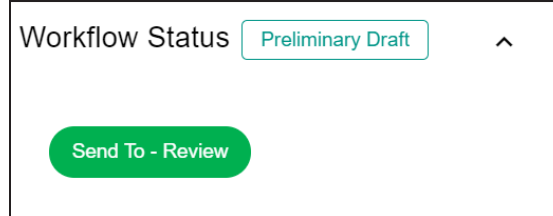
For example, the following image displays the first stage as First Draft.



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

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

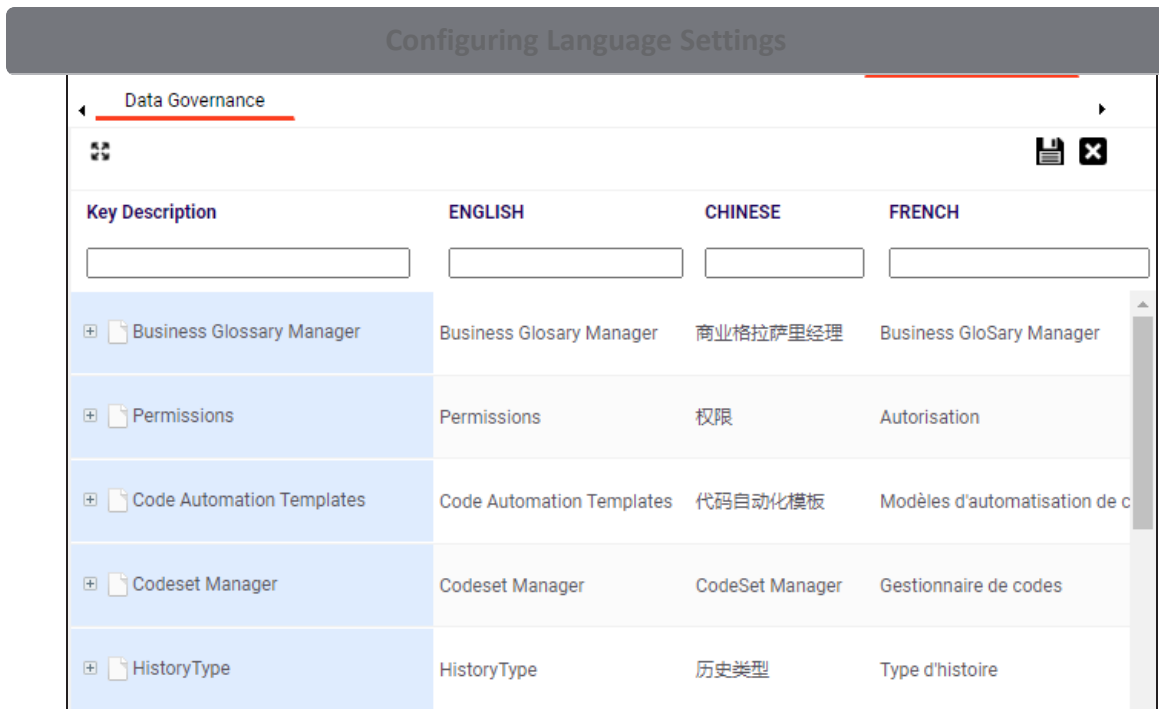
To use the application in any of these languages, configure user-based language preference in the Resource Manager. For more information, refer to the [Creating Users and Assigning Roles](#) topic.

Starting erwin DI 15.0, language settings for supported languages are pre-configured. However, you can edit or configure your own language settings for UI labels.

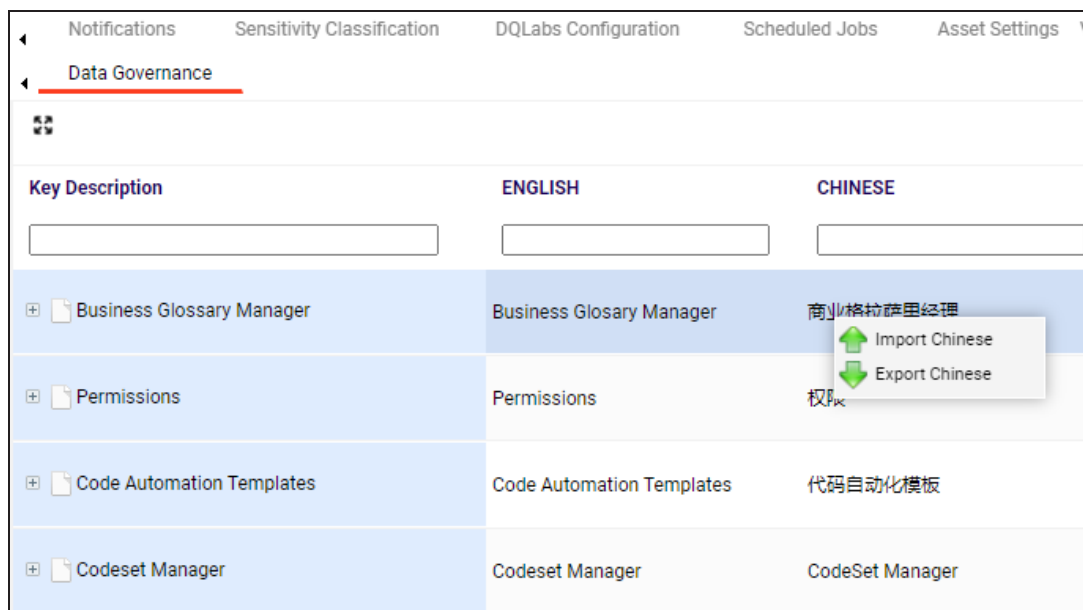
To configure language settings for UI labels, follow these steps:

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.

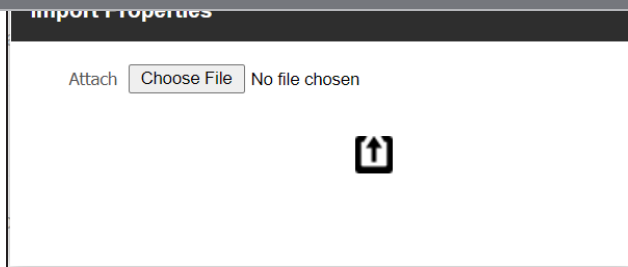


- To upload UI labels in a required language, right-click a cell under the language column and click **Import <Language>**.



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.

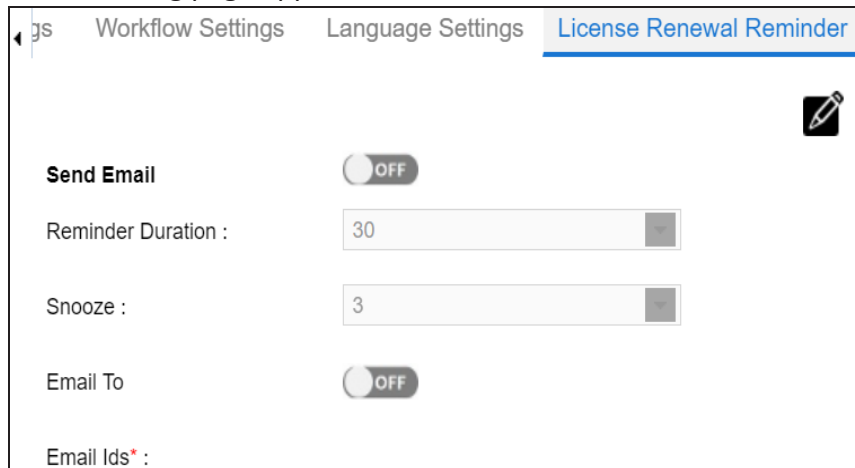
Configuring License Renewal Reminders

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

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

Next
Save & Exit
Cancel

Form Name *

Description

Form Type *

Select Option

- 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.

- 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](#)

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

Filter Fields by All

Save & Exit
Cancel

Field Name	Property	Value
	Mandatory	☐ OFF
Associated Business Term	Default value	
Business Key Flag	Regular Expression	
Column Alias	Order	6
Column Class	Visibility	☒ ON
Column Comments		
Column Definition		
Column Name		
Created By		
Created Date Time		
File Starting Position		

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:

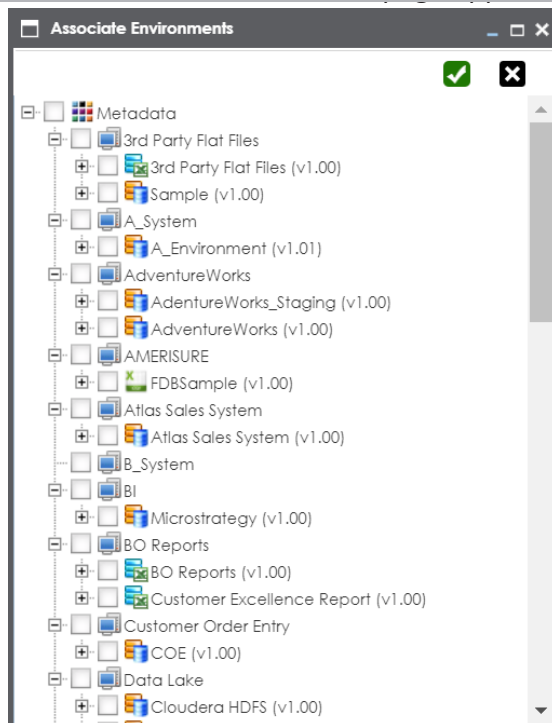
1. Go to **Application Menu > Settings > Miscellaneous Configurations > Form Validation Settings**.

The following page appears.

Settings Language Settings License Renewal Reminder <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. In the **Options** column, click .

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.

#	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. Use the following options to manage forms:

Edit

To edit forms, click .

Managing Forms

Save & ExitCancel

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.

Overview:
The mapping specification records are auto synced with the lineage tables. The following two options have been provided so that, should any disruption occur, the mapping records with the lineage tables using these options.

Add New
This option will load only new mapping records that have been added to the mapping specification table since the last sync. This option is an alternate to sync any new records.

Delete & Reload
This option will delete all the existing records from the lineage tables and reload the mapping records.

Links Threshold
Number of Connected Links: 3000
Overview Lineage: ☒

Note: This is the maximum number of connected links that will be displayed on the graphical lineage UI. If the actual number of connected links exceed this threshold, then the application will not be able to render the diagram on the lineage UI and will switch over to the Grid view.

Lineage Sync History Log

Sync Type	Last Synced by User	Last Synced Date
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

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.

Configuring HP ALM

Field Name	Description
	For example, James99.
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.

- Click  to test the connection.

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

- 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.

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:

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.

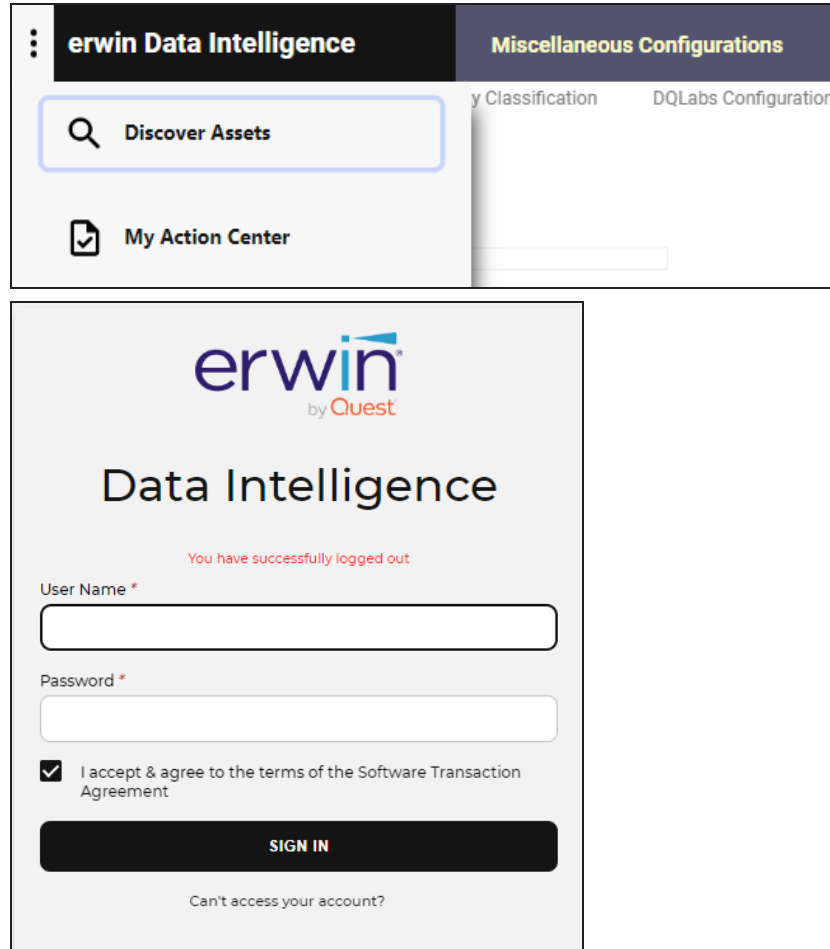
For example, the following theme displays the name of the instance as erwin DI v15.0.

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.

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.

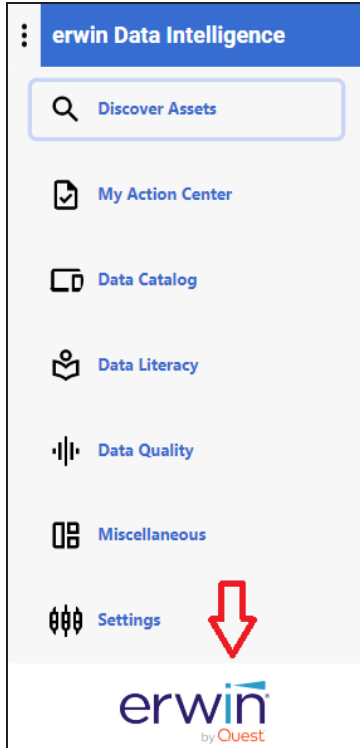
To configure **Secondary Theme Color**, click  and select a color from the color palette.

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

Configuring Menu Theme

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.

ALM Configuration Menu Theme Date Format Security Settings Business Entity Types

Enable Secure Exit Warning ☒ ON

Secure Exit Message

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.

Warning

You are leaving a secure site and are about to enter an external site. Do you want to proceed?

Yes 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.

Lineage Settings

ALM Configuration

Menu Theme

Date Format

Security Settings

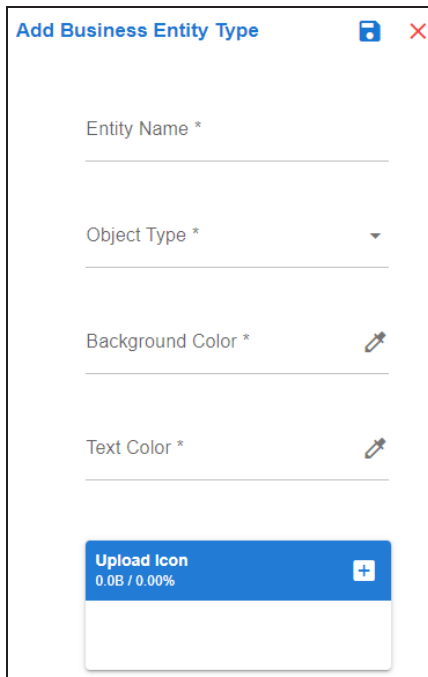
Business Entity Types

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



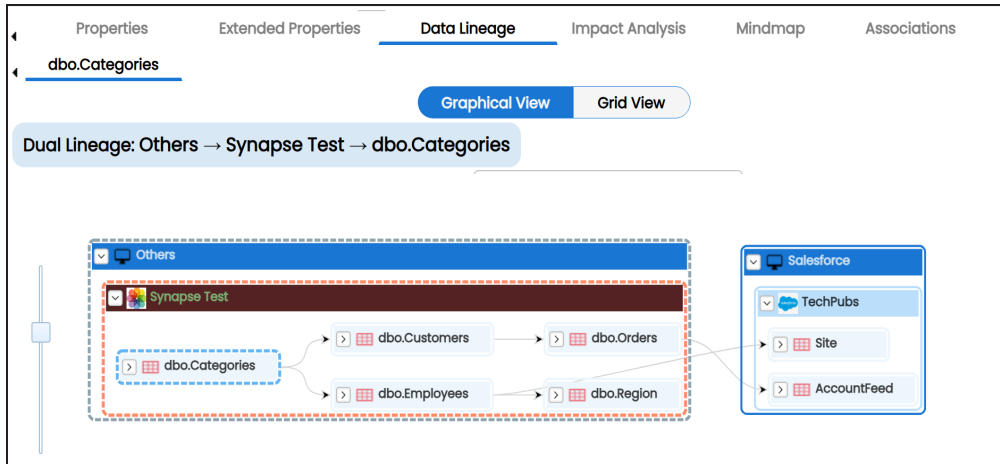
3. Enter appropriate values in the fields. Fields marked with an asterisk are mandatory. Refer to the following table for field descriptions.

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

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/DiSuite4...	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/DiSuite4...	Links to the Cloud 11, Quest hosted.	Administrator	22-07-2024 14:28:34	Administrator	22-07-2024 14:28:34	✎ ⌂ ✖ 🗑	

2. Click **+**.

Configure Instance





Instance Name *

Instance URL *

Authorization Token *



Description *

Align ▾




B
I

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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

#	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/Disuite4...	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/Disuite4...	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** ():
Use this option to edit the IDR configuration, description, and other properties.
- Update Token** ():
Use this option to update the authentication token.
- Ping** ():
Use this option to ping the configured instance.
- Delete** ():
Use this option to delete an IDR configuration.

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**.

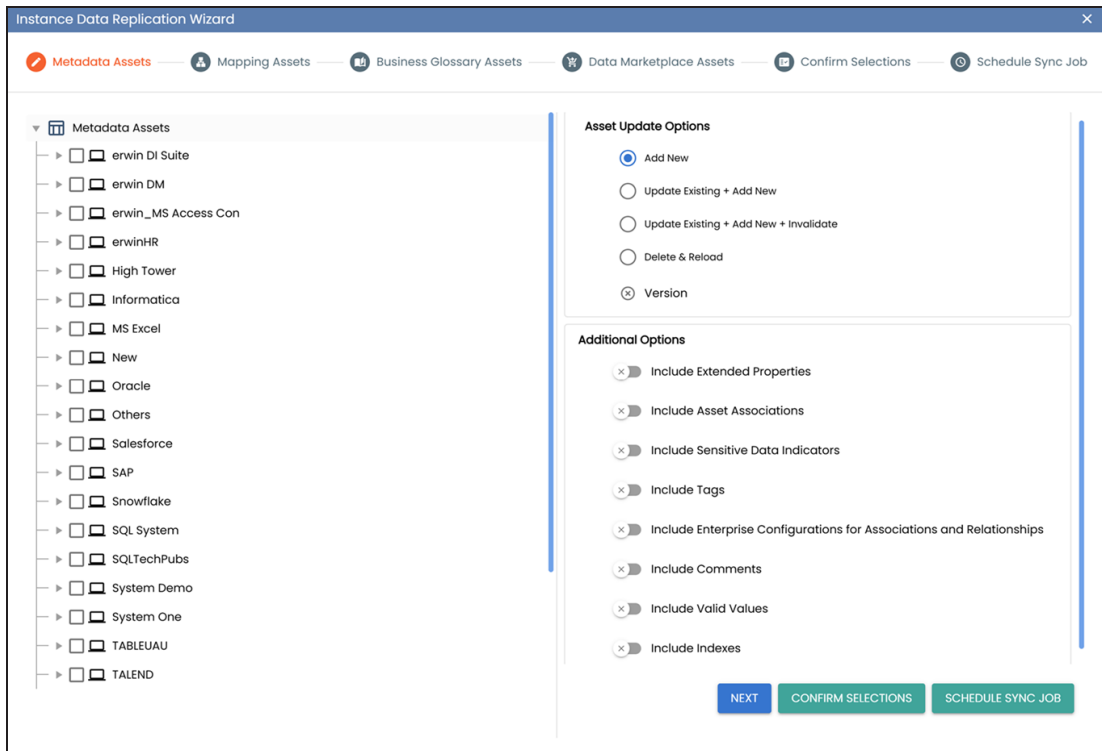
The following page appears and displays scheduled jobs for data sync.

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 **+**.

Scheduling IDR Jobs

by default.



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-

Instance Data Replication Wizard

 Metadata Assets  Mapping Assets

▼  Metadata Assets

- ▶ ☐  erwin DI Suite
- ▶ ☒  erwin DM
- ▶ ☐  erwin_MS Access Con
- ▶ ☐  erwinHR
- ▶ ☐  High Tower
- ▶ ☒  Informatica
- ▶ ☐  MS Excel
- ▶ ☐  New
- ▶ ☒  Oracle
- ▶ ☐  Others
- ▼ ☒  Salesforce
 - ☒  Salesforce
 - ☐  Salesforce1
 - ☐  TechPubs

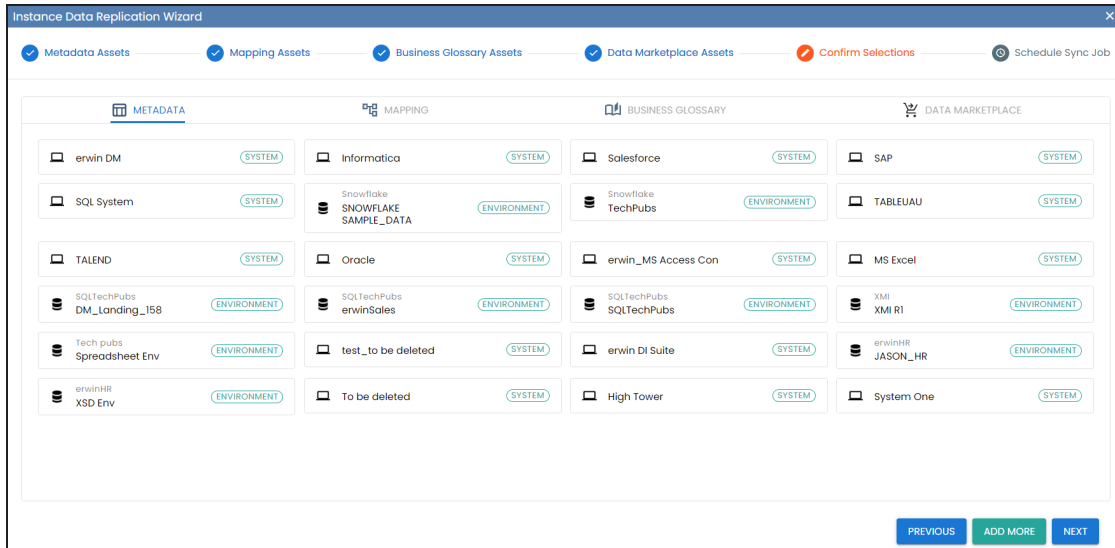
4. On the Metadata Assets tab, choose the asset update options and additional options based on your requirements. For more information on these options, refer to the [Asset Update Options](#) section.
5. Click **Next**. This action navigates you to the different asset types for data selection and replication.
Repeat steps 3 to 5 to select assets on the Mapping Assets, Business Glossary Assets, and Data Marketplace Assets tabs.

Scheduling IDR Jobs

navigate to a different asset type to continue your selection based on your requirements.

7. Click **Next**.

The Confirm Selections tab will appear, and display the selected assets for each asset 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

✓ Metadata Assets
✓ Mapping Assets
✓ Business Glossary Assets
✓ Data Marketplace Assets
✓ Confirm Selections
✗ Schedule Sync Job

Job Name
IDRJob_1746540938214

Run Now

Schedule Job On
06-05-2025 14:23:51

Local Server

Interval
Only Once

Send Email

Select the Master erwin Data Intelligence Instance to push the selected data to
Data On Cloud 34

Incase you cannot find your instance in the above drop down
[Create a new instance](#)

PREVIOUS
FINISH

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

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.

Scheduling IDR Jobs

Field Name	Description
	• 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.
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 .

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.

Scheduling IDR Jobs		
Section	Option	Description
	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 Configurations for Associations and Relationships	Switch this option ON to include configurations and relationships associated with the asset.
	Include Valid Values	Switch this option ON to include valid values associated with the asset.
	Include Indexes	Switch this option ON to include indexes associated with tables and columns.

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.

Title	Value	
Company Name:	Dev License	
Allowed Projects:	30	Paste License 
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	Activate License
Reporting Manager:	Enabled	

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

Name	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.
GenAI Add-On	Specifies the generative AI bot is enabled for this license. The value Enabled indicates the bot is included with your license.
Allowed DI 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	Specifies the license creation date and time.

Configuring License	
Title	Description
Date	
Validity	Specifies the license validity in days.
License Expiry Date	Specifies the license expiry date and time.

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

The license is updated.

Configuring erwinAI

This topic walks you through the configuration of the erwinAI.

Prerequisites

Before you begin, ensure the following prerequisites are met:

- Purchase of the erwinAI add-on and receipt of a welcome email with the licensing portal URL and license number



If you haven't received the email, contact your support team.

- Access to the Quest Licensing portal at <https://licensing.ism.quest.com>
- Permissions to update the DI properties file
- Internet access, including access to the following #genai server endpoint URLs:
 - `genai.api.url` for 15.1: <https://erwindi-chat.ai.ism.quest.com/api>
 - `genai.api.url` for 15.2: <https://api.ai.ism.quest.com/openai/deployments/gpt-4.1/chat/completions?api-version=2024-10-21>
 - `genai.token.url` for both releases: <https://id.quest.com/auth/realms/ism/protocol/openid-connect/token>

Steps to Configure AI in erwin DI

The following steps outline the process for configuring AI:

- [Creating Organization](#)
- [Adding Licenses](#)
- [Assigning Users](#)
- [Enabling the Feature](#)

- [Updating Properties File in erwin DI](#)
- [Verifying in erwin DI](#)
- [Configuring Roles for the erwinAI Bot 15.1](#)
- [Configuring Roles for erwinAI Features 15.2](#)



Following steps display the configuration for release 15.1. To configure erwinAI for release 15.2, you can follow the same steps.

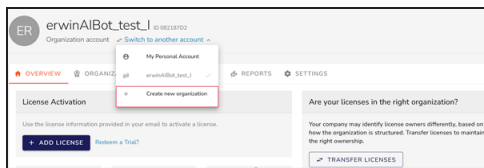
Creating Organizations

You can create organizations to simplify license management for teams with multiple licenses and a number of users.

To create an organization in the Quest Licensing portal, follow these steps:

1. Log in to the [Quest Licensing portal](#) using the same email address that received the welcome email.

The portal home page opens.



2. Click **Switch to another account**, and then select **Create new organization**.

The Add Organization page opens.

< Add Organization ?

1 Name

Creating an Organization allows you to associate people and licenses and manage them from one place.

Organization Name

CANCEL NEXT →

2 Add Member(s) ?

3 Transfer License(s)

4 Finish

3. Enter the organization name, and click **Next**.
 4. Add email addresses of the members you want to add, and click **Next**.
 5. Select an existing license to transfer to the organization, or skip this step.
- The Finish section appears.

Configuring erwinAI

✓ Name

✓ Add Member(s)

✓ Transfer License(s)

4 Finish

Congratulations, you're almost there.

Review your Organization data below. Click on previous steps above to make adjustments before adding your new Organization.

Your new organization name will be erwinAI.

The following User(s) will be added to the new Organization:

User(s)	Role
erwinAI	Organization Owner

← PREVIOUS CANCEL + ADD ORGANIZATION

6. Review the details, and then click **Add Organization**.

Your organization is added to the Overview tab.

Adding Licenses

To add your license to the Quest Licensing portal, follow these steps:

1. Go to the [Quest Licensing portal](#). From the Overview page, locate the organization to which you want to add a license.

The License Activation section appears.

License Activation

Use the license information provided in your email to activate a license.

+ ADD LICENSE Redeem a Trial?

2. In the License Activation section, click **Add License**.

The Add License to erwinAI Bot page opens.

< Add License to erwinAI Bot test

erwinAI Bot test > Add License

Enter your license information.

Licenses can only contain numeric values in the format: 123-456-789

License Number

132-646-868

Destination

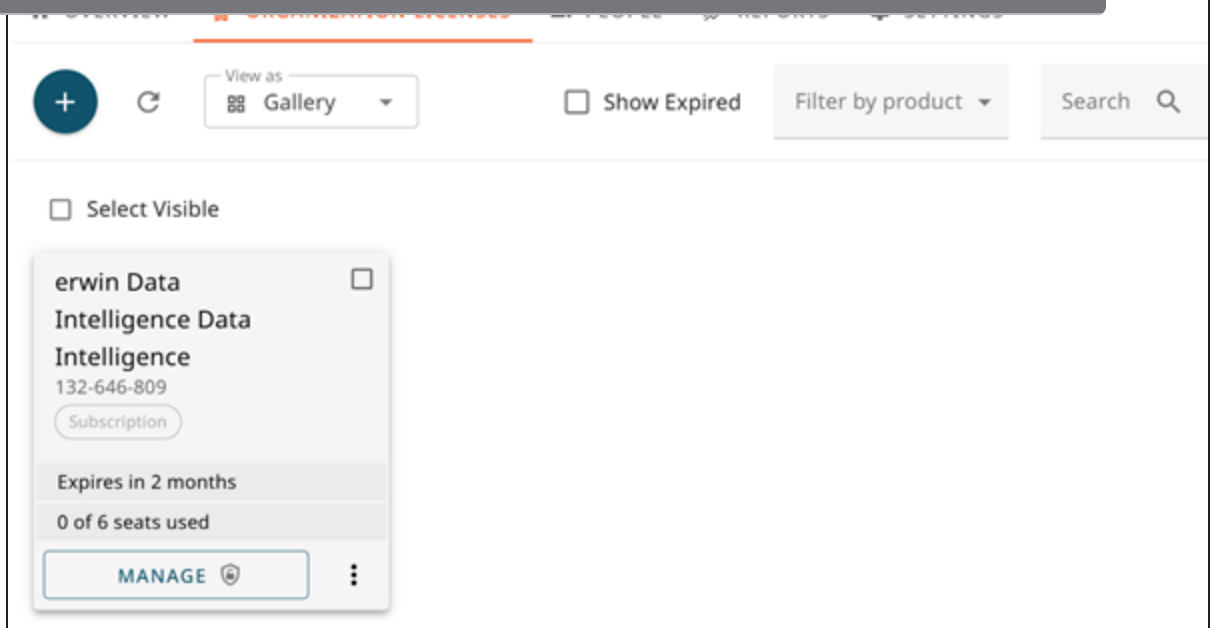
erwinAI Bot test 01B5C765

CANCEL

ADD LICENSE

3. Enter the license number in the License Number field, and then click **Add License**. For example, 132-646-868.

You can view your subscription on the Organization Licenses tab.



Assigning Users

After you add the license, you can assign users to the erwinAI.

To assign users, follow these steps:

1. Go to the Organization Licenses tab.
2. On the Subscription card, click **Manage**.

The license page opens.

The screenshot shows the 'erwin Data Intelligence' interface. At the top, there's a breadcrumb trail: 'erwinAI Bot test > licenses > license'. Below this, license details are displayed: Number 132-646-809, Usage 0 of 6 seats used, Status Type Organization, and Expires Oct 12, 2025. A navigation bar includes 'OVERVIEW', 'SEATS' (highlighted), 'REPORTS', and 'SETTINGS'. Below the navigation bar, there are two circular icons: a plus sign and a person icon. A search bar is also present. Below these elements is a table with headers: 'Email', 'Features', 'Last Access', and 'Status'. The table is currently empty, with the text 'No data available' at the bottom.

3. On the Seats tab, click  to assign users.

The Assign Users dialog box appears.

The 'Assign Users' dialog box has a title bar 'Assign Users'. Below the title bar, it says 'Enter one or more email addresses, separate additional emails with a comma.' It provides examples: 'Valid email list examples; email1@domain.com or email1@domain.com, email2@domain.com, ...'. There is a text input field with a placeholder and a close button (X). Below the input field, a note states: 'Note: The email addresses listed above will receive a notification letting them know you have assigned them a seat and can begin using the product.' At the bottom right, there are two buttons: 'CANCEL' and 'ASSIGN'.

Configuring erwinAI



Seats are not related to the number of AI users. Assigning a user seat to the admin who receives the welcome email is sufficient for setup.

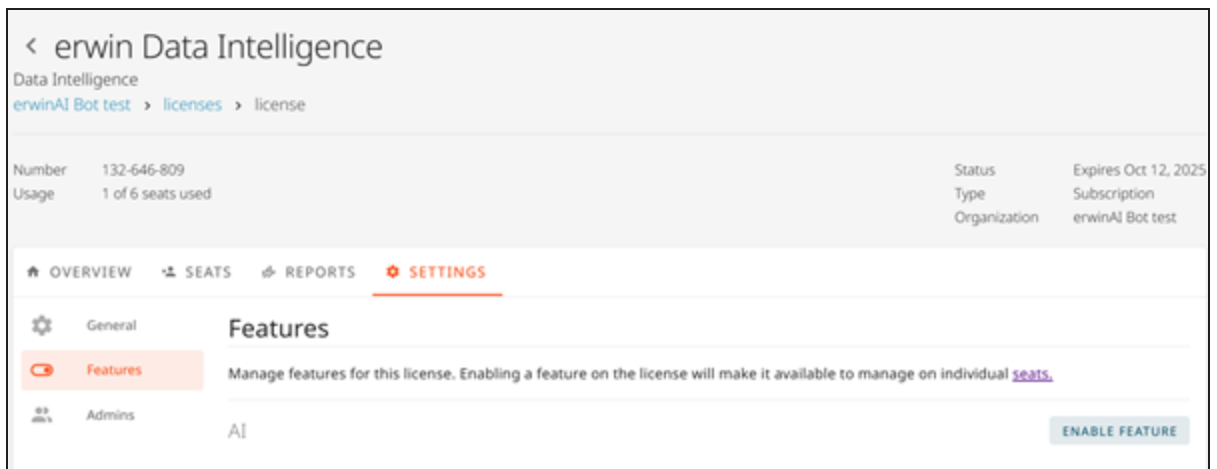
4. Enter the same email address that you used to log in to the Quest Licensing portal, and then click **Assign**.

Enabling the Feature

Once the users are assigned, you need to enable the AI feature.

To enable AI feature, follow these steps:

1. On the Settings tab, click **Features**.



2. In the Features section, next to AI, click **Enable Feature**.

The Enable AI dialog box appears.

Configuring erwinAI

Enable AI

☒ Enable for all existing and future seats

☒ I read, understand and accept the [STA](#), [DPA](#), and [AI Terms of Use](#).

CANCEL
APPLY

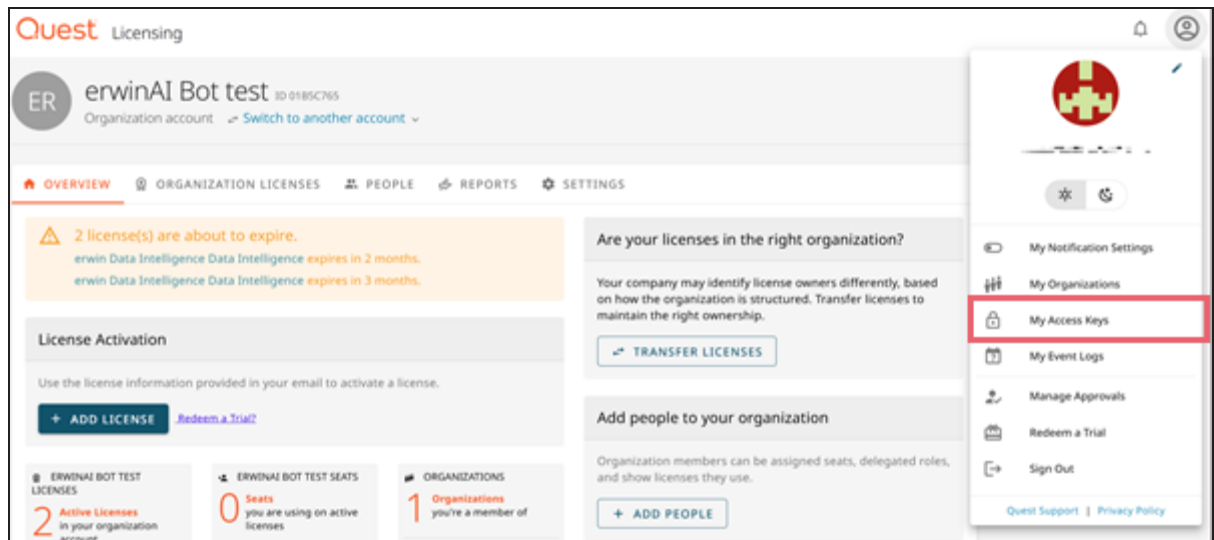
- Review the terms of usage and select both the conditions, and then click **Apply**.

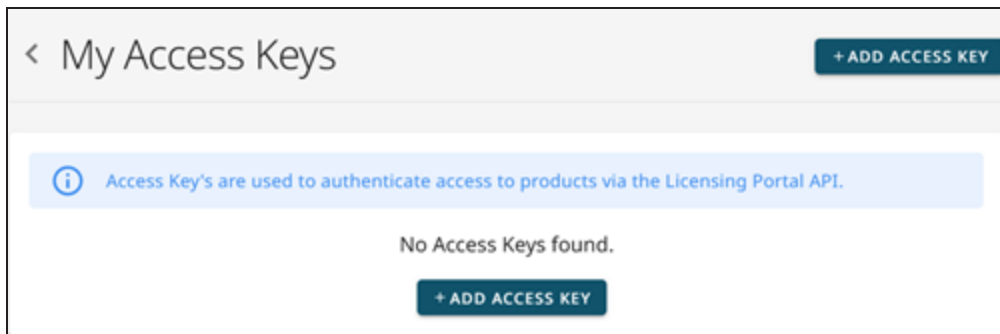
Creating Access Keys

You can now create the access key required to initiate erwinAI.

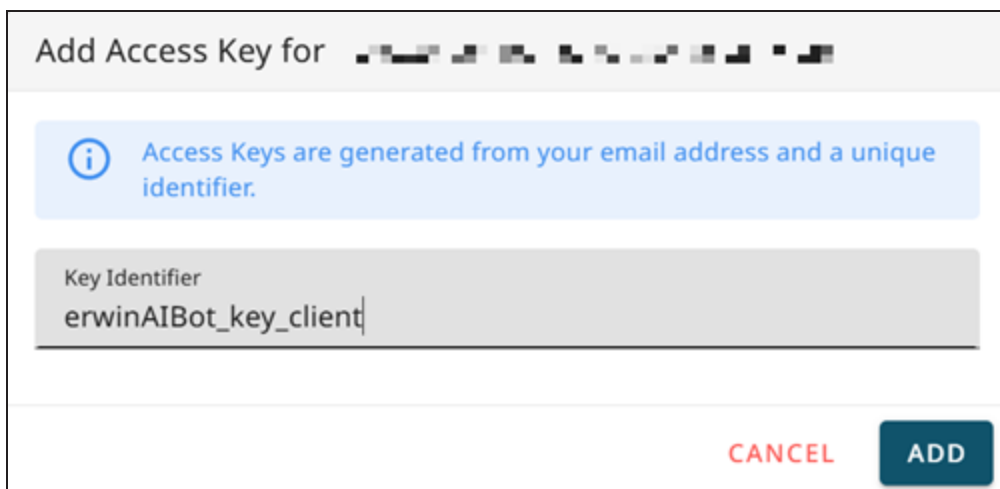
To create access keys, follow these steps:

- On the Profile menu, select **My Access Keys** or go to <https://licensing.ism.quest.com/user/access-keys>.

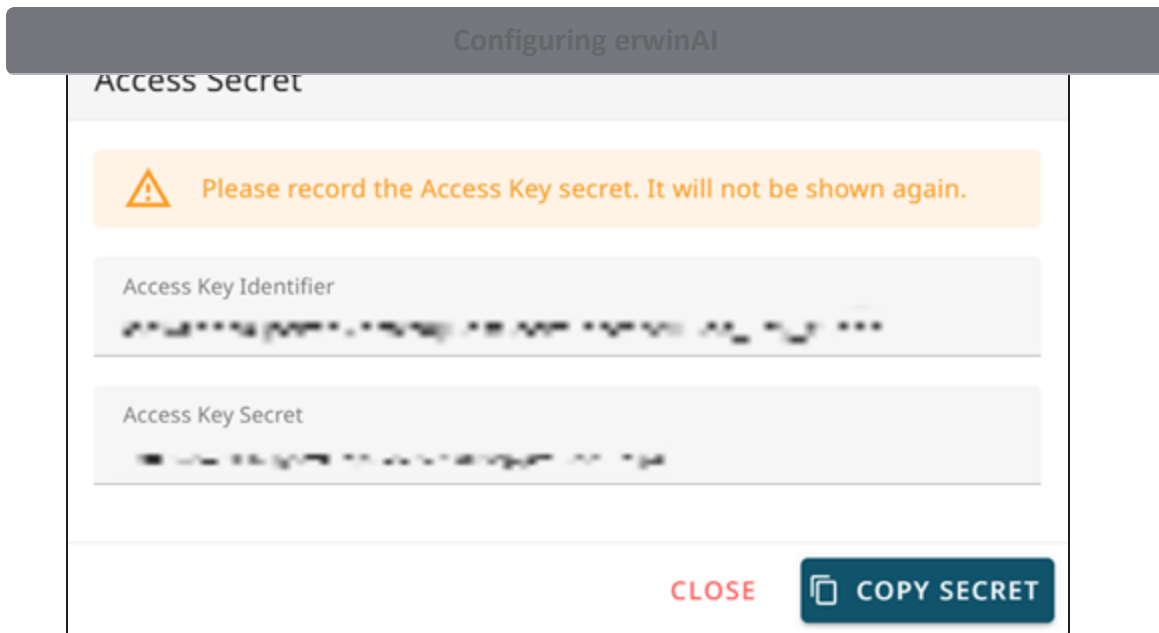




2. Click **Add Access Key**.



3. Enter a key identifier in the corresponding field, and then click **Add**. For example, erwinAIBot_key_client. Access key is generated from your email address and this unique identifier.
In the Access Secret dialog box, Access Key Identifier and Access Key Secret are displayed.



4. Click **Copy Secret** to copy. Save the Access Key Secret. It will not be displayed again.

Updating Properties File in erwin DI

If you are running erwin DI locally, you must add the Key Identifier and Key Secret to the Application.properties file to enable the erwinAI:

1. In your local machine, go to C:\Program Files\Apache Software Foundation\Tomcat10.1_Tomcat10.1.24\webapps\erwinDISuite_AI\Bot\WEB-INF\configuration\properties.
2. Locate and open the Application.properties file.
3. Add the License Number, Access Key Identifier, and Access Key Secret to the corresponding properties. Set encrypted=false the first time you configure this. Ensure that the following URLs are set to the corresponding properties:
 - `genai.api.url` for 15.1: `https://erwindi-chat.ai.ism.quest.com/api`
 - `genai.api.url` for 15.2: `https://api.ai.ism.quest.com/openai/deployments/gpt-4.1/chat/completions?api-`

Configuring erwinAI

- `genai.token.url` for both releases: `https://id.quest.com/auth/realms/ism/protocol/openid-connect/token`

The following image shows the properties file for release 15.1, similarly, you can add properties for 15.2.

```
#genai server end-points
genai.api.url=https://erwindi-chat.ai.ism.quest.com/api
genai.token.url=https://id.quest.com/auth/realms/ism/protocol/openid-connect/token
#genai server credentials
genai.client.license.number=<enter license number here>
genai.client.id=<enter client id here>
genai.client.secret=<enter client secret here>
genai.client.secret.encrypted=false
```



The license number must include dashes. For example, 132-646-868 not 132646868.

4. Restart Tomcat.



After Tomcat restarts, the encrypted property is updated to true to ensure secure data handling.

The erwinAI is enabled for you.

Verifying in erwin DI

To verify that the erwinAI is enabled for you, follow these steps:

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

The License tab appears.

Configuring erwinAI

License		
Title	Value	Apply New License
Business Rules Manager:	Enabled	
Discover Assets:	Enabled	
Data Marketplace:	Enabled	
GenAI Add-On:	Enabled	
Allowed DI Users:	11	
Concurrent DI Logins Allowed:	11	
Allowed Business Users:	999999	
Concurrent Business Logins Allowed:	999999	

Configuring Roles for the erwinAI Bot 15.1

To configure roles for the erwinAI Bot (version 15.1), follow these steps:

1. Go to **Application Menu > Data Catalog > Resource Manager**.

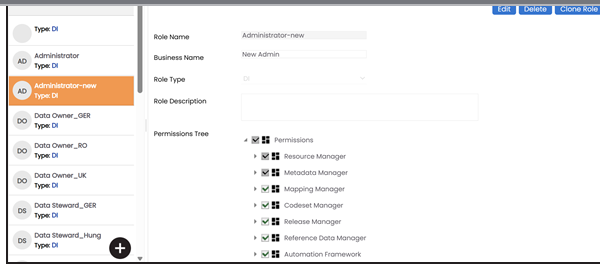
The Resource Manager page appears. By default, the Users tab opens.

The screenshot shows the 'Users' tab in the Resource Manager. On the left is a list of users, including 'Administrator - Default System'. The main area displays the 'User Details' for this user. The details are organized into three columns: 'Profile', 'Governance Responsibilities', and 'Access Rights/Report'.

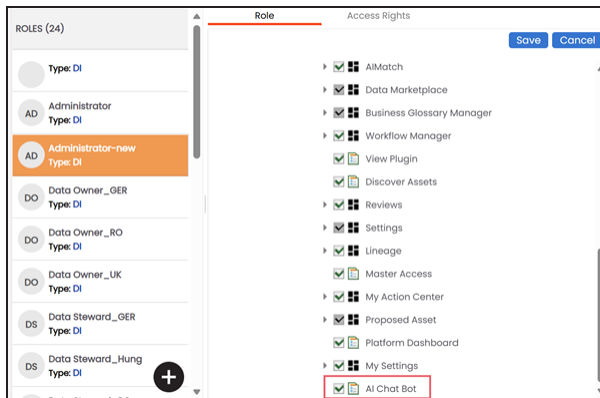
Profile	Governance Responsibilities	Access Rights/Report
User Details Login Type: Database User ID: Administrator User Full Name: Administrator - Default System U Password: [Masked] Mobile: 9999999999 Company Title: Administrator Default Role: Admin Created By: System Last Modified By: Administrator Landing Module: Mapping Manager User Image: [Avatar]	Telephone Number: 9999999999 Email ID: abc@abc.com Alternate Telephone Number: 9999999999 Manager Name: Company: erwin, Inc. Created Date Time: 26-02-2020 03:48:26 Last Modified Date Time: 07-01-2025 10:33:43 Theme: erwin Language Preference: English User Type: DI	

2. On the Roles tab, select the role to grant access to the erwinAI Bot.

Configuring erwinAI



3. In the Role section, click **Edit**.



4. In the Permission Tree, select the AI Chat Bot check box, and then click **Save**.

The erwinAI Bot is configured for the selected role.



The AI Chat Bot option is available only for DI users.

Configuring Roles for erwinAI Features 15.2

Following erwinAI features are available in version 15.2:

- erwinAI Smart Query Assist
- erwinAI Assistant
- erwinAI Inline Assist

Configuring erwinAI



The erwinAI Assistant and erwinAI Inline Assist features are available only for DI users.

To configure roles for erwinAI features, follow these steps:

1. Go to **Application Menu > Data Catalog > Resource Manager**.

The Resource Manager page appears. By default, the Users tab opens.

The screenshot shows the 'Users' tab in the Resource Manager. On the left, a list of users is displayed, with 'Administrator' selected. The main area shows the 'User Details' for the selected user. The details include:

- Login Type: Database
- User ID: Administrator
- User Full Name: Administrator - Default System U
- Password: [Masked]
- Mobile: [Masked]
- Company Title: Administrator
- Default Role: Admin
- Created By: System
- Last Modified By: Administrator
- Landing Module: Mapping Manager
- User Image: [Placeholder]
- Telephone Number: 999999999
- Email ID: abc@abc.com
- Alternate Telephone Number: 999999999
- Manager Name: [Blank]
- Company: erwin, Inc.
- Created Date Time: 20-02-2020 03:48:28
- Last Modified Date Time: 07-01-2025 10:33:43
- Theme: erwin
- Language Preference: English
- User Type: DI

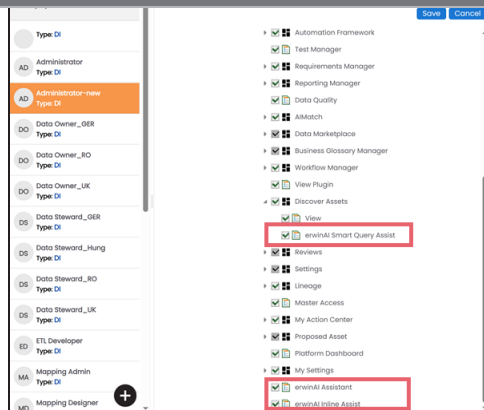
2. On the Roles tab, select the role to grant access to erwinAI features.

The screenshot shows the 'Roles' tab in the Resource Manager. On the left, a list of roles is displayed, with 'Administrator-new' selected. The main area shows the 'Role' details for the selected role. The details include:

- Role Name: Administrator-new
- Business Name: New Admin
- Role Type: DI
- Role Description: [Blank]
- Permissions Tree: [Tree view showing various permissions]

3. In the Role section, click **Edit**.

Configuring erwinAI



4. In the Permission Tree, select the check boxes for erwinAI features you want to enable, and then click **Save**.

erwinAI features are configured for the selected role.