GUIDE

erwin Data Intelligence

Configuration Guide 15.0

Legal Notices

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Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

Access the erwin support site and click Sign in to register for product support.

Accessing Technical Support

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

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

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Contents

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

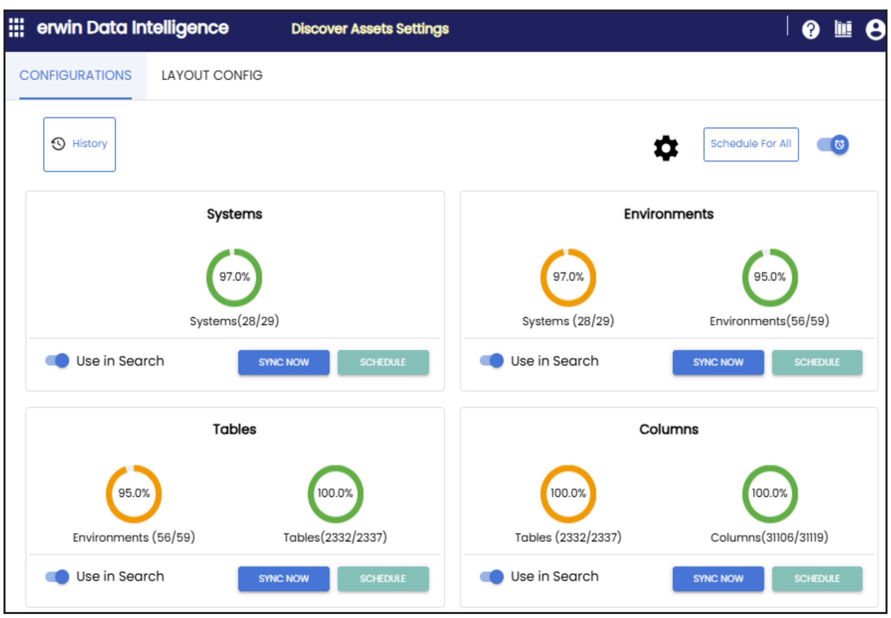
Configurations

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.

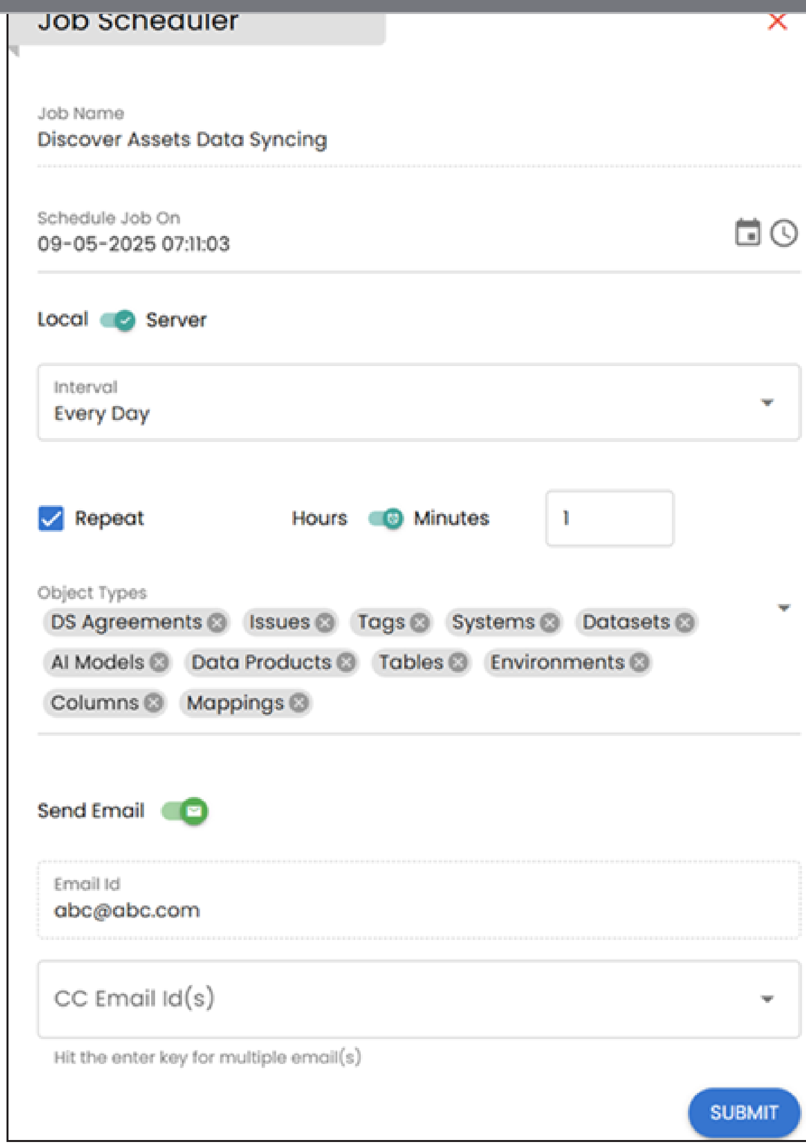
Scheduling Synchronization Jobs

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.



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

Field Name	Description
Job Name	Specifies the job name.

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-

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

3. Click **Submit**.

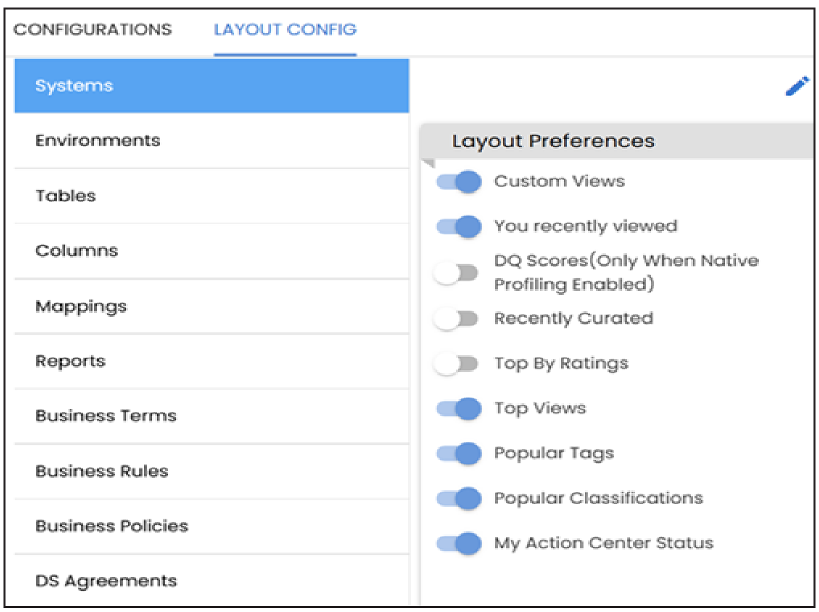
The synchronization job is scheduled.

Layout Config

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

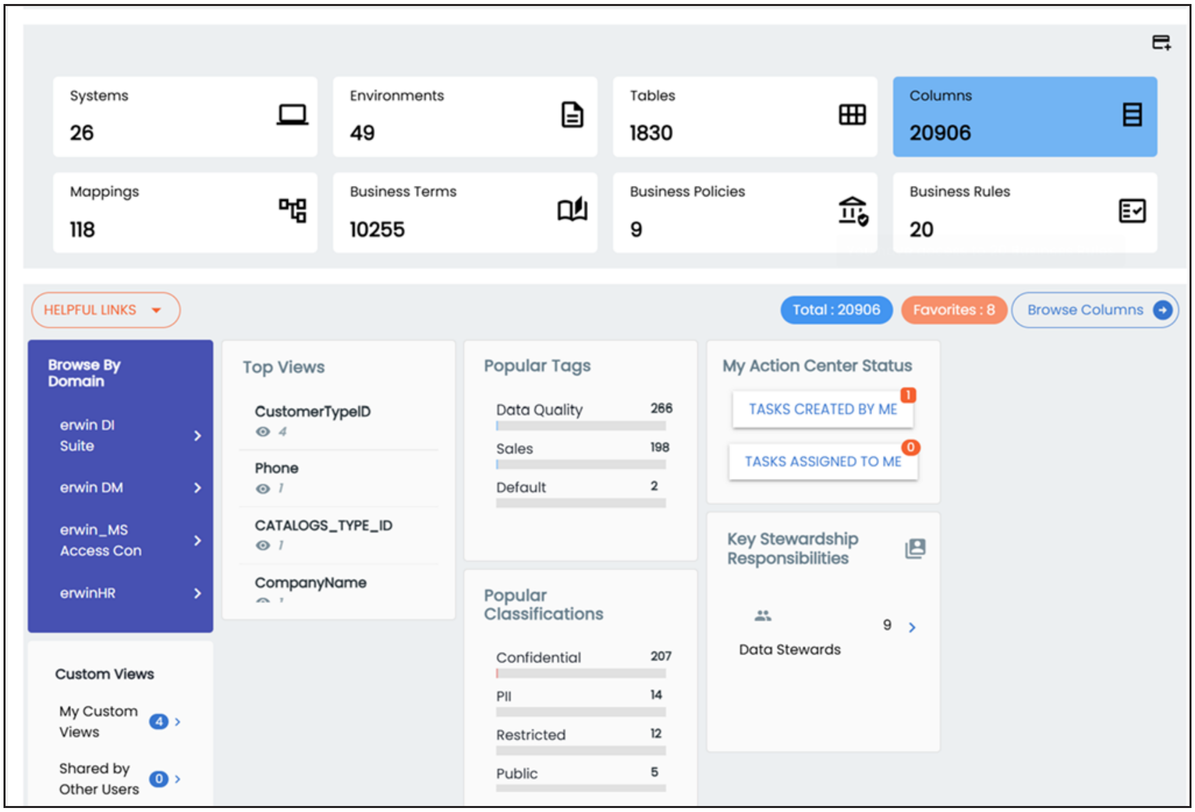
To configure the layout preferences, follow these steps:

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.



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.

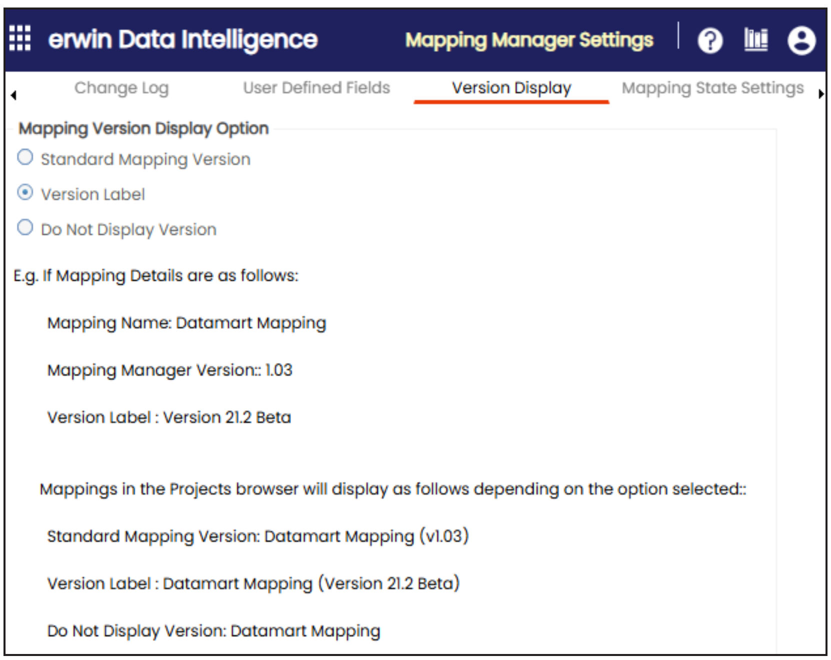


Configuring Mapping Manager

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:



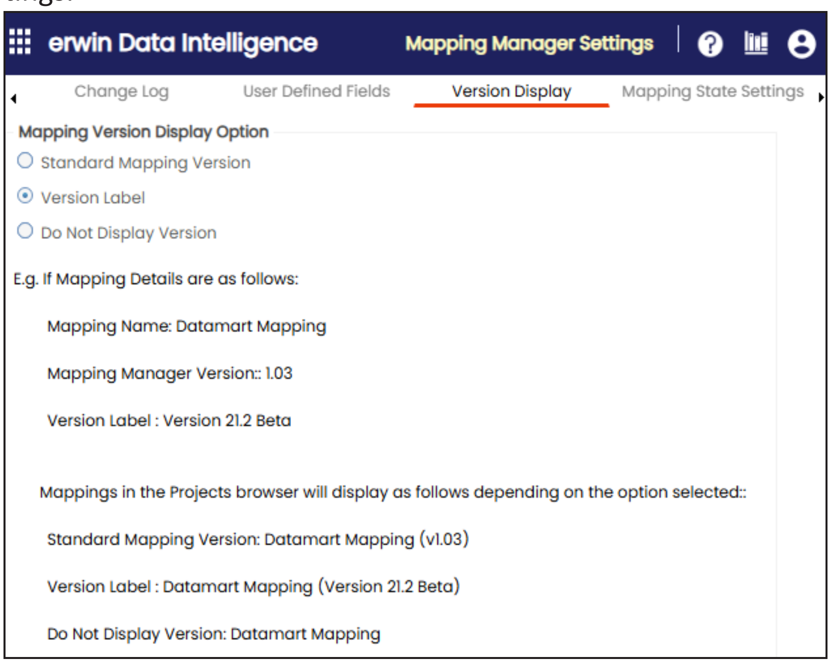
Configuring Change Log Settings

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

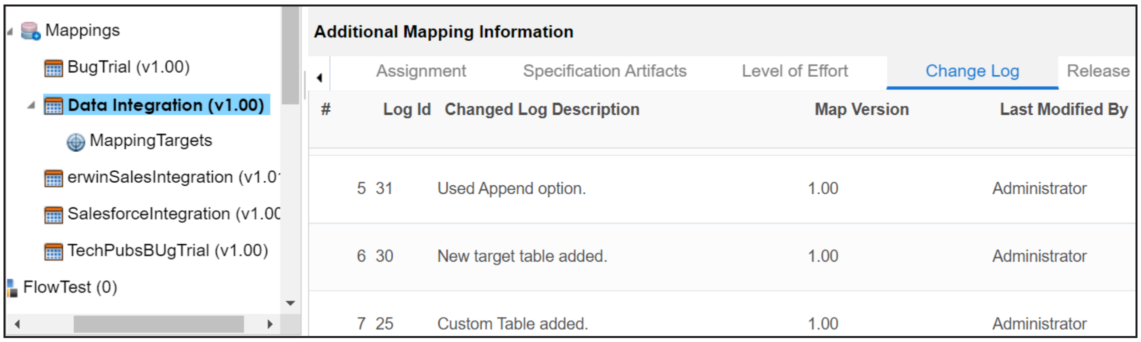
   To capture change logs for the Mapping Specification tab, select the check box.

   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.



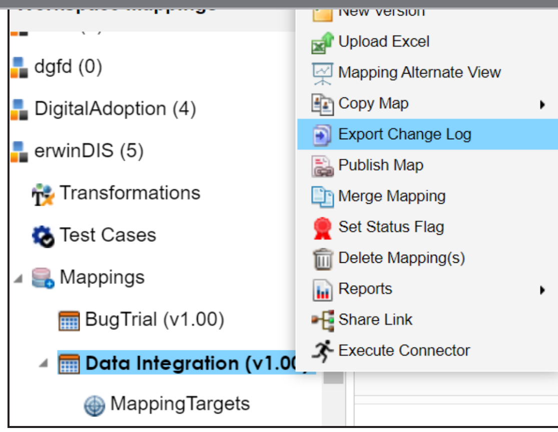
Enable export of Change Logs to MS Excel (at the Project Subject and Mapping Levels)

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

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

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

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



Enable Change Log capture for Mapping Specification tabs

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.

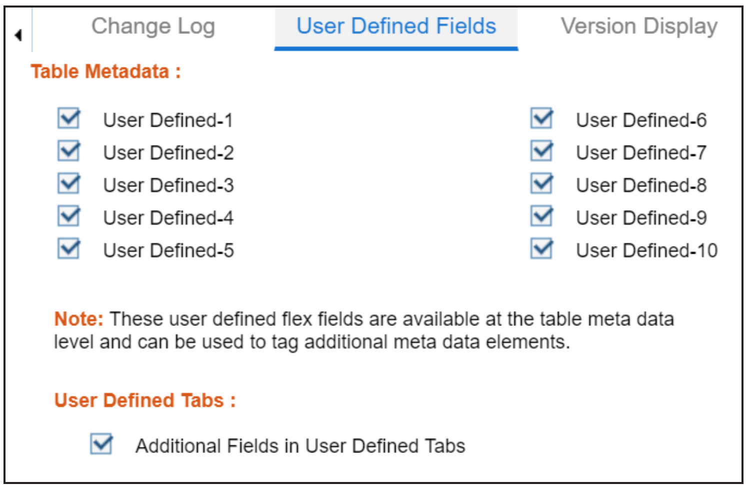
Configuring User-defined Fields

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:

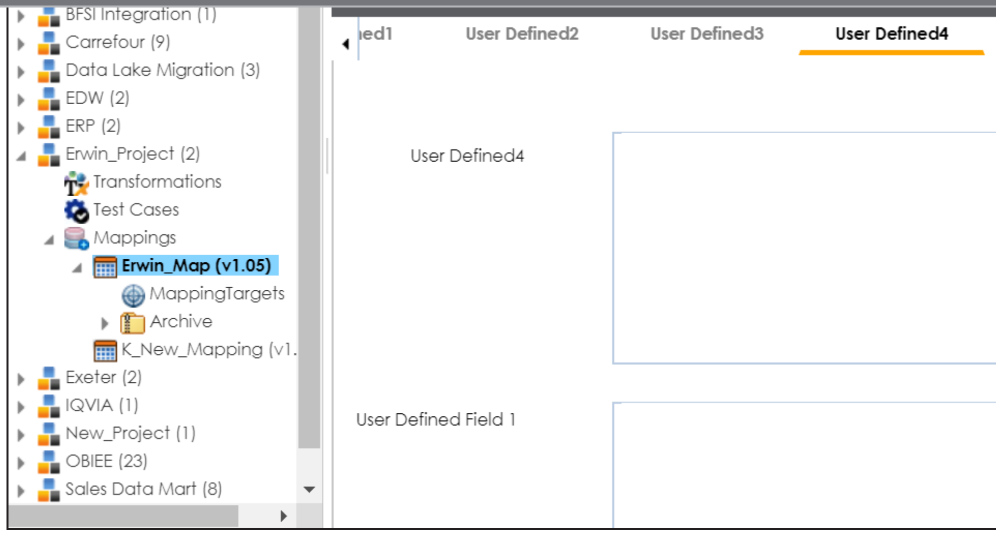
1. Go to **Application Menu** > **Settings** > **Mapping Manager**.
2. Click the **User Defined Fields** tab.

   The following page appears.

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

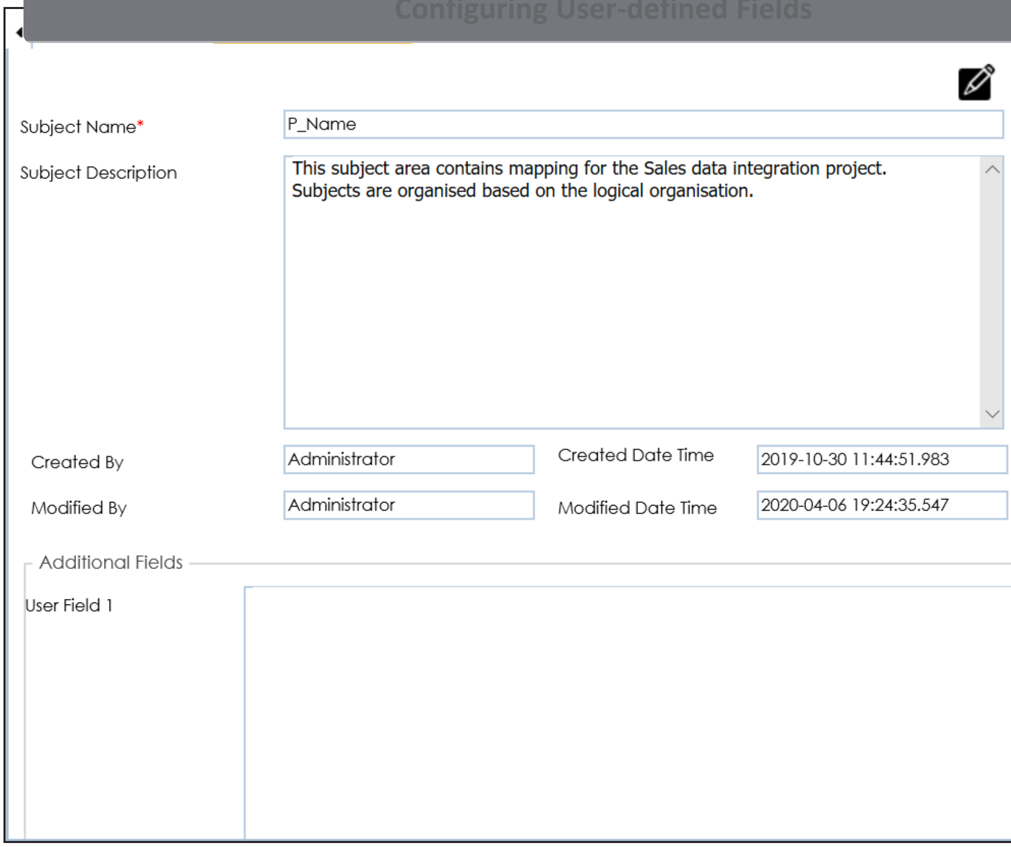
   20 additional fields are added to the User Defined4 and User Defined5 tabs.



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.



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.

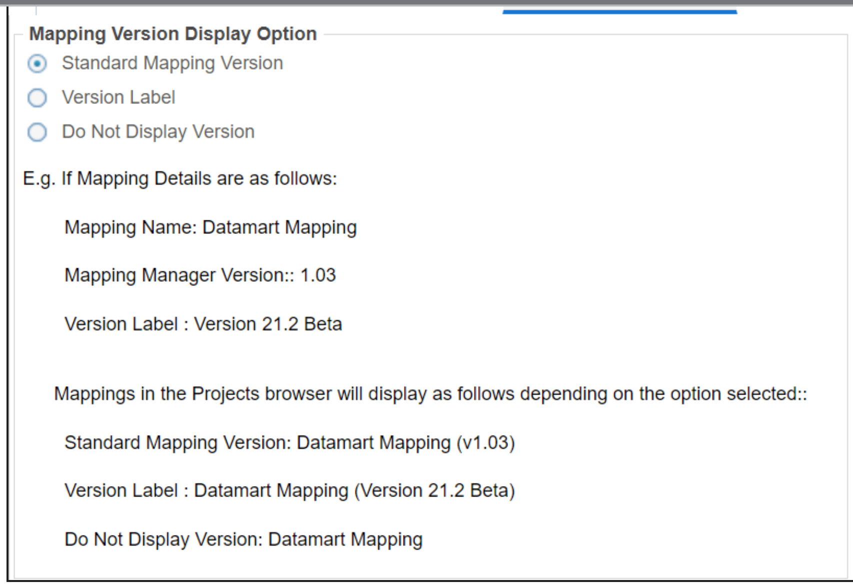
   For example, Erwin_Map (Data_Migration), where Erwin_Map is the Map Name and Data_Migration is the Version Label.

   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.

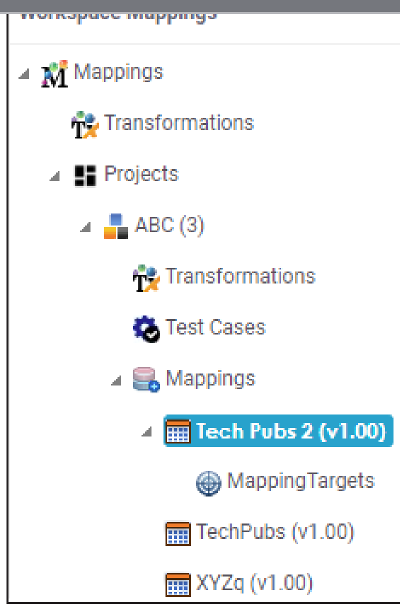


3. Use the following options:

Standard Mapping Version

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

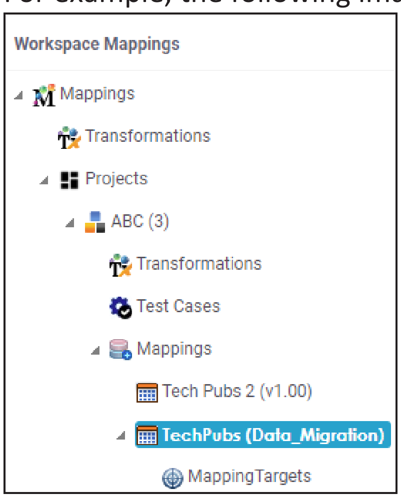
For example, the following image displays the map version in the standard mapping version form.



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**.

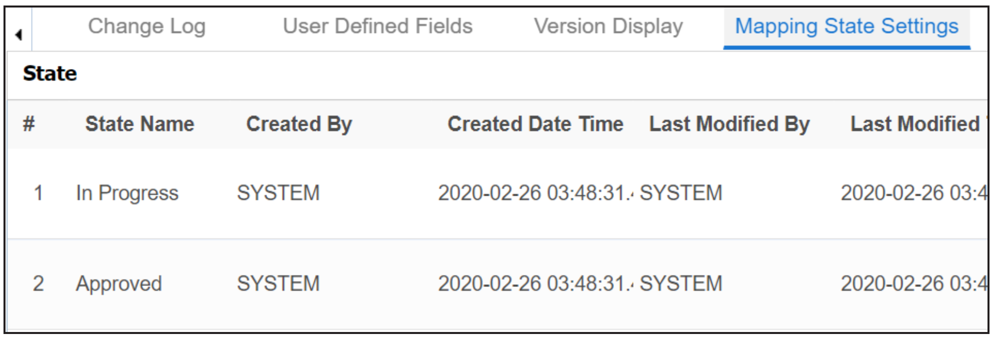
Configuring Mapping State Settings

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:

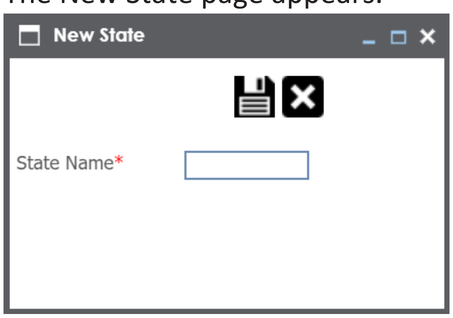
1. Go to **Application Menu** > **Settings** > **Mapping Manager**.
2. Click the **Mapping State Settings** tab.

   The following page appears.



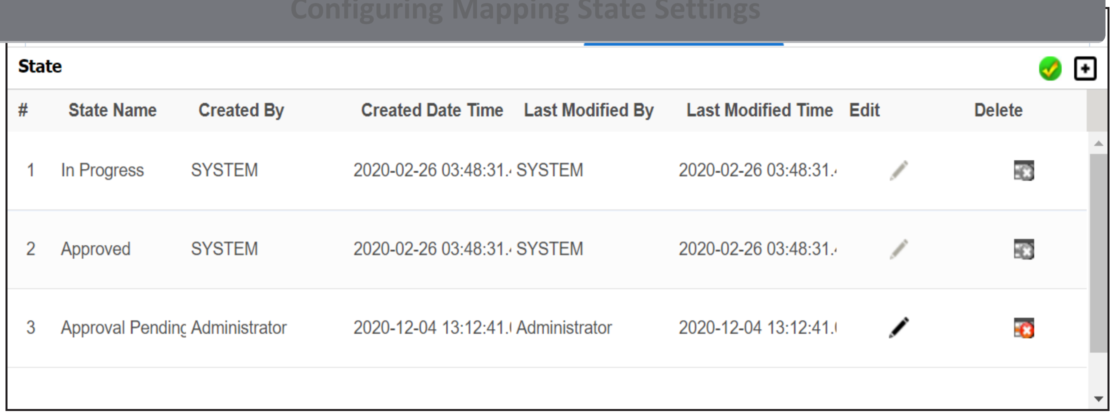
3. Click .

   The New State page appears.



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

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



Use the following options:

Edit ( )

You can update State Name.

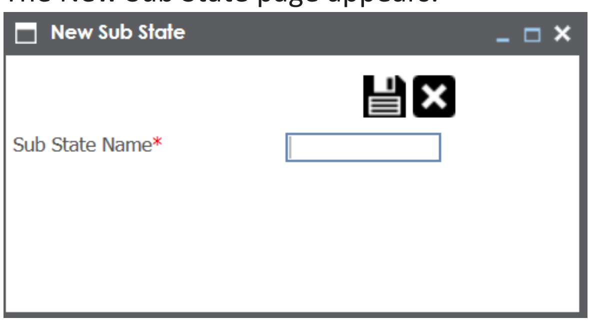
Delete ( )

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.

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

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

#	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:

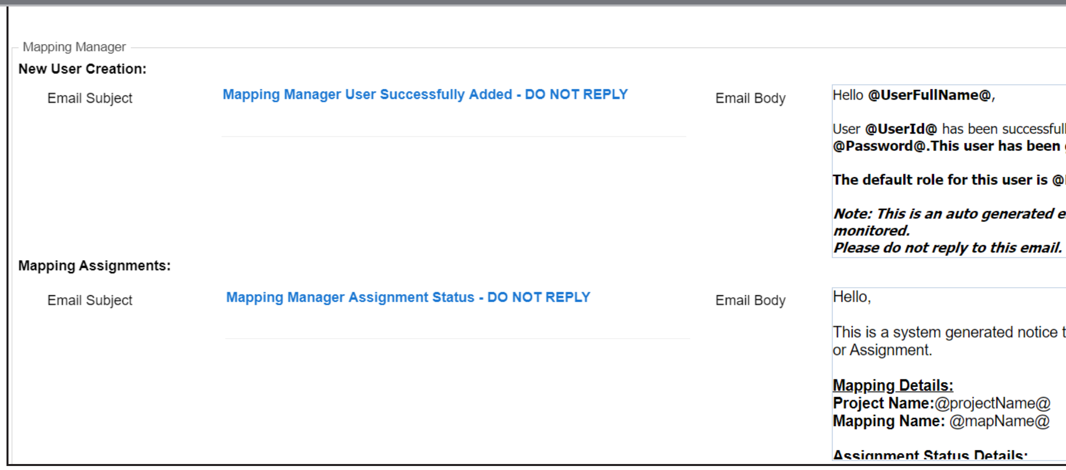
- Creating new users
- Assigning maps to users
- Forgetting user credentials
- Creating new maps
- Updating mapping specifications
- Creating versions of maps
- Merging maps
- Copying and pasting maps
- Uploading mapping specification in XML
- Base-lining projects

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.



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.

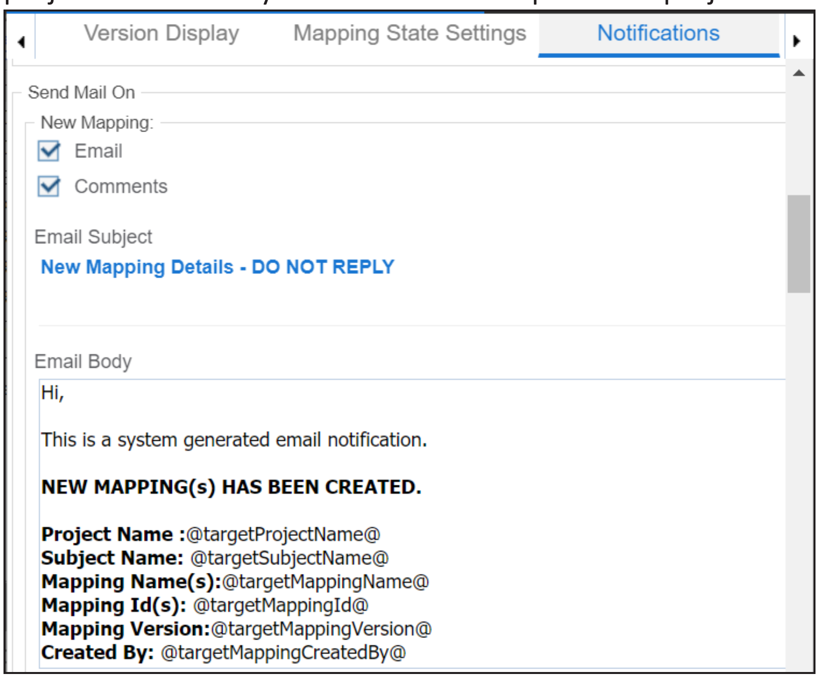
Forgot Password

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.



Use the following options:

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

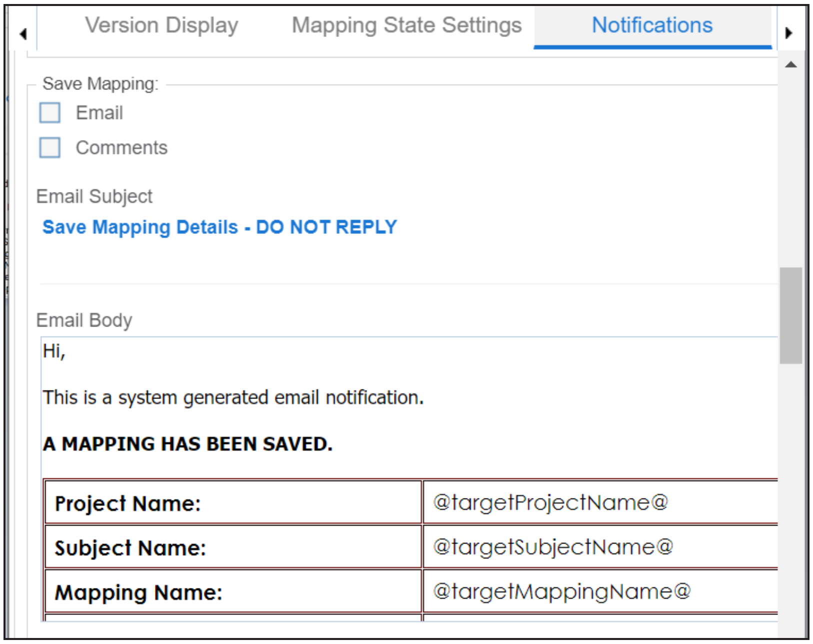
Comments: You can use this check box only when the Email check box is selected. To include comments entered while creating a map, select the **Comments** check box.

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.



Use the following options:

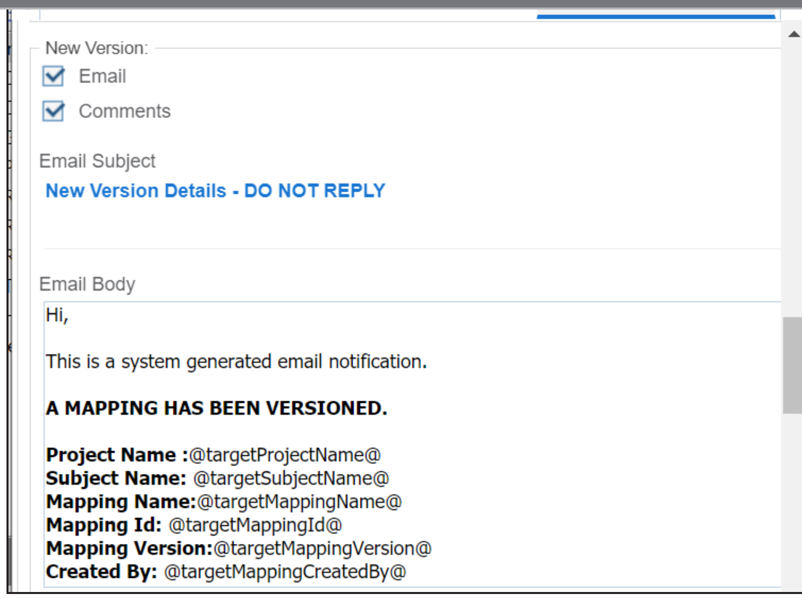
Email: To turn on email notifications, select the **Email** check box.

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.



Use the following options:

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

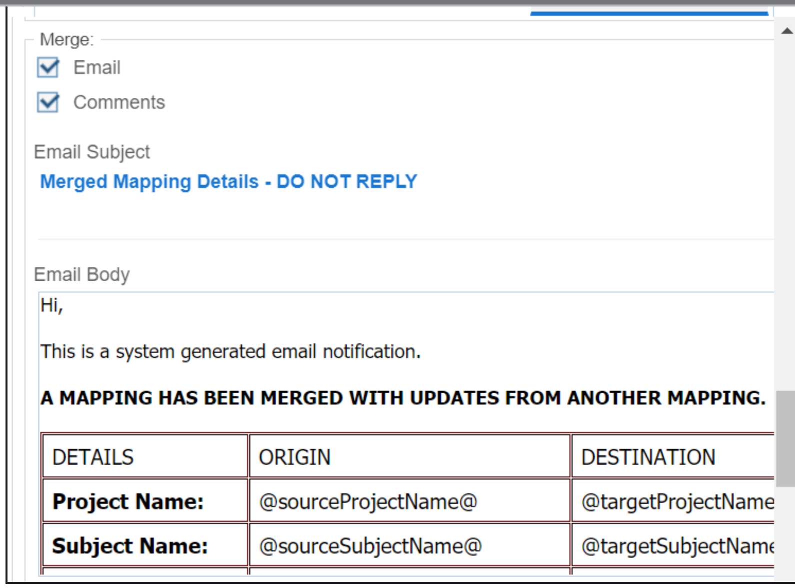
Comments: You can use this check box only when the Email check box is selected. To include comments entered while creating a new version of a map, select the **Comments** check box.

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.



Use the following options:

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

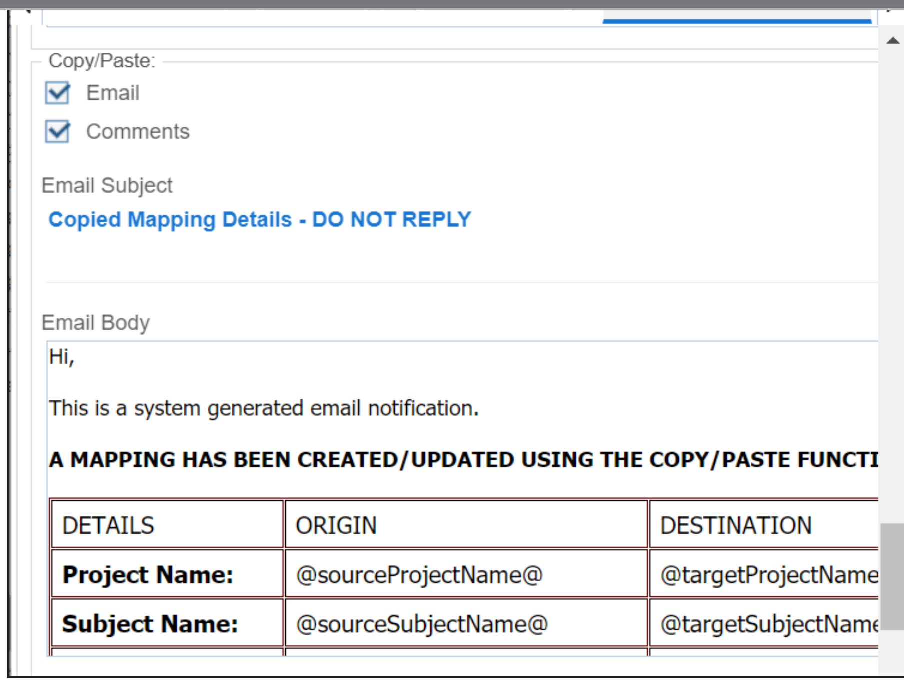
Comments: You can use this check box only when the Email check box is selected. To include comments entered while merging a map, select the **Comments** check box.

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.



Use the following options:

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

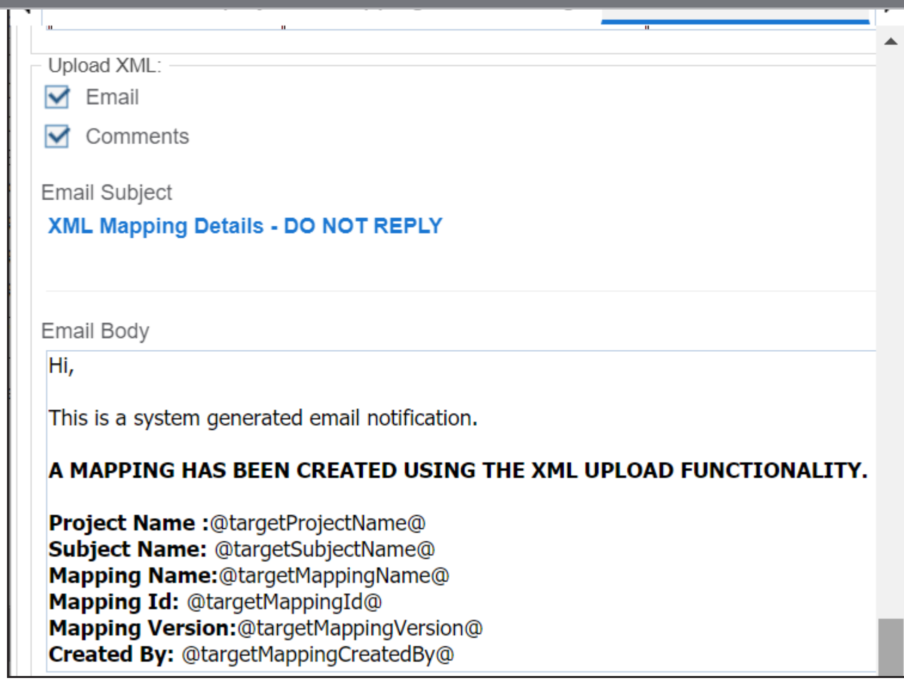
Comments: You can use this check box only when the Email check box is selected. To include comments entered while pasting a map, select the **Comments** check box.

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.



Use the following options:

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

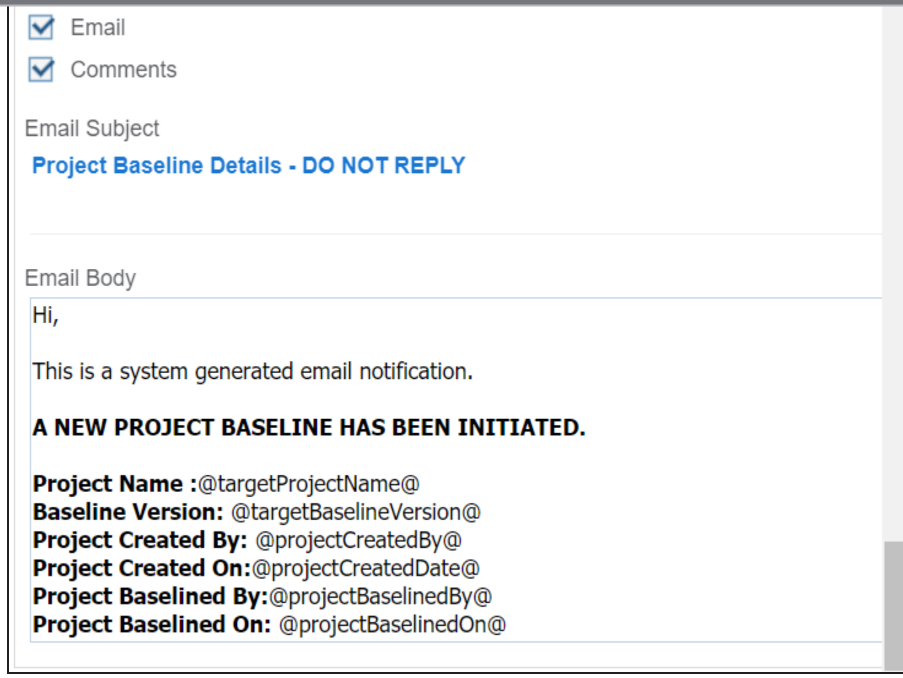
Comments: You can use this check box only when the Email check box is selected. To include comments entered while uploading a map in XML, select the **Comments** check box.

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.



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.

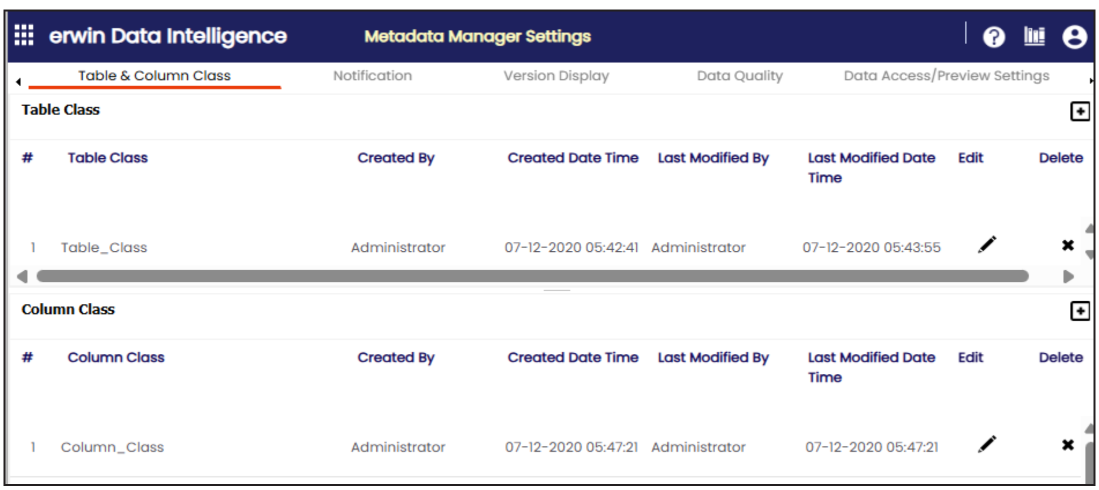
Configuring Metadata Manager

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:



> You can set up the Metadata Manager with respect to user defined fields on the Mapping Manager Settings page.

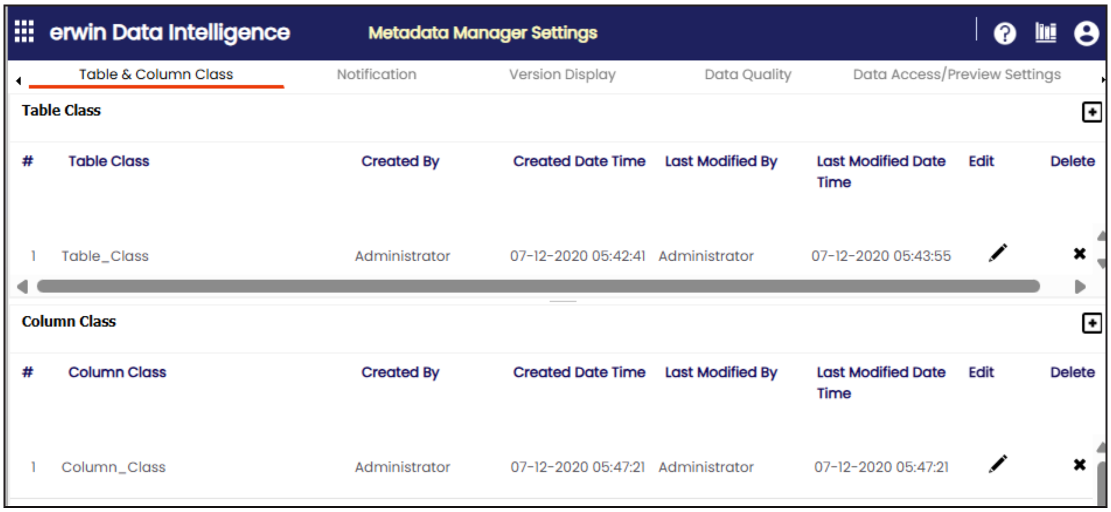
Configuring Table and Column Classes

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:

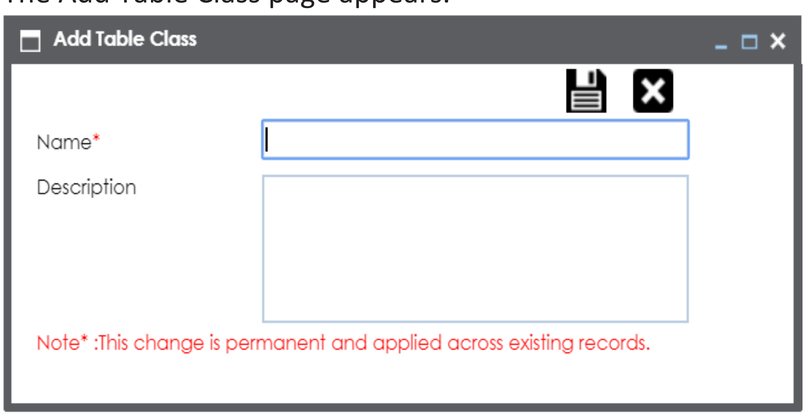
1. Go to **Application Menu** > **Settings** > **Metadata Manager**.

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



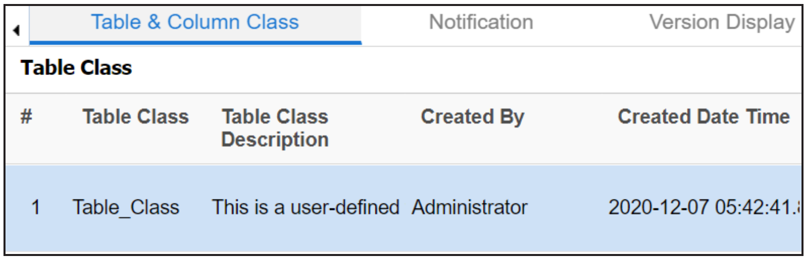
2. Under the **Table Class** section, click .

   The Add Table Class page appears.



4. Click .

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



5. Use the following options:

   Edit ( )

   To edit the table class, click .

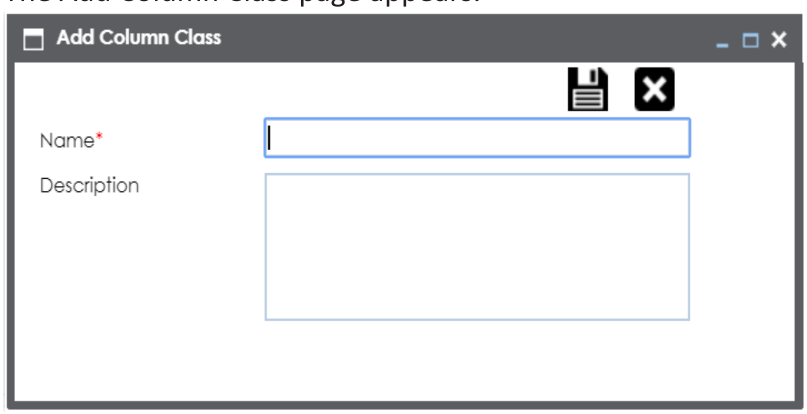
   Delete ( )

   To delete the table class, click .

To configure column classes, follow these steps:

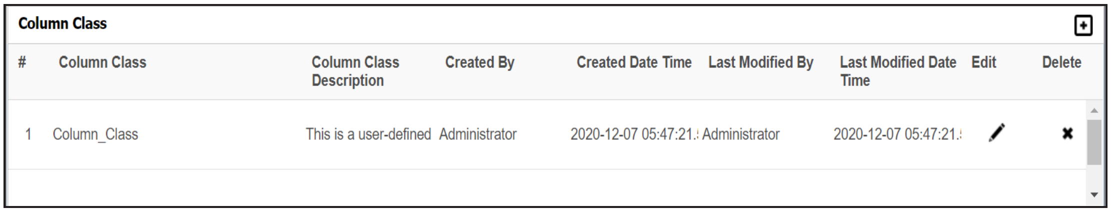
1. Under the **Column Class** section, click .

   The Add Column Class page appears.



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

3. Click .



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.

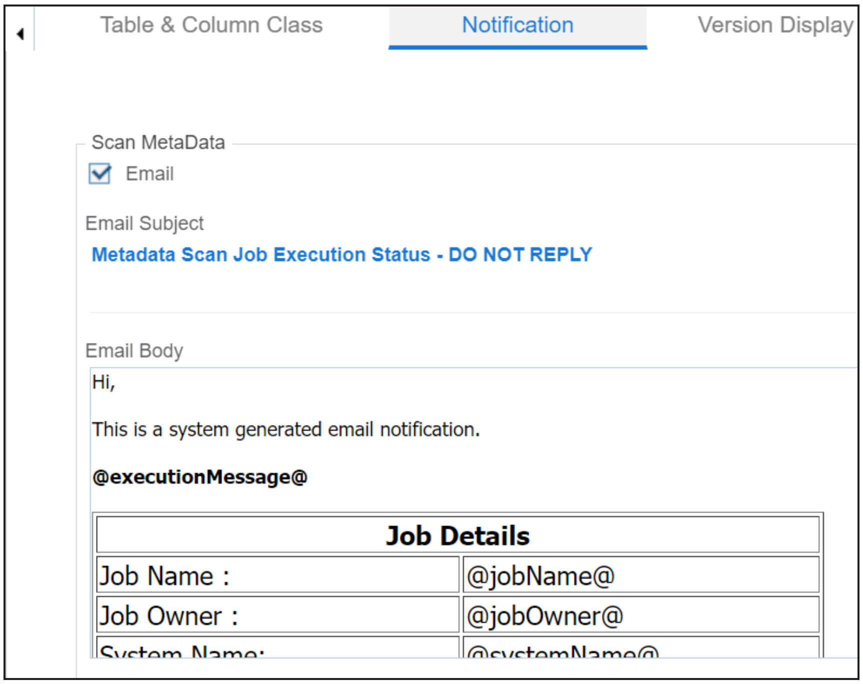
Configuring Notifications on Scanning Metadata

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.



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.

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.

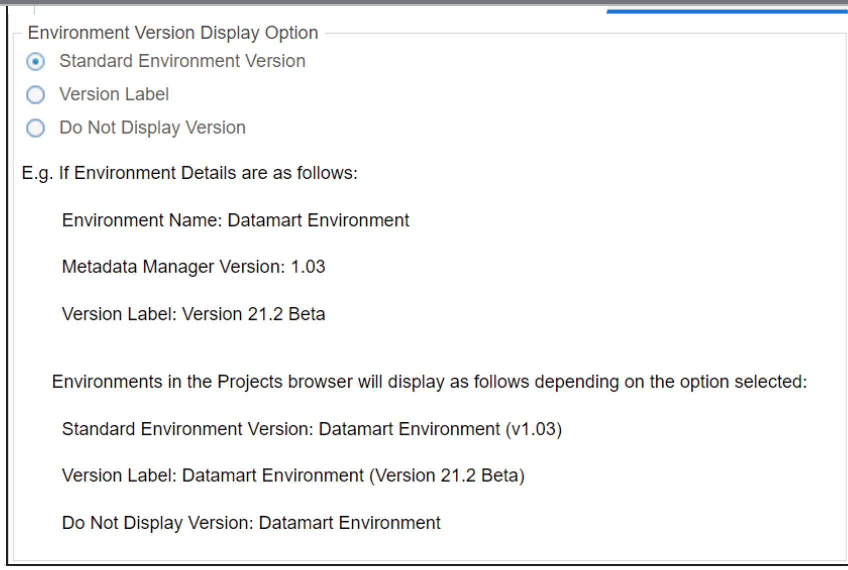
   For example, Data_Migration (erwin_Metadata), where Data_Migration is the environment name and erwin_Metadata is the version label.

   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.



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**.

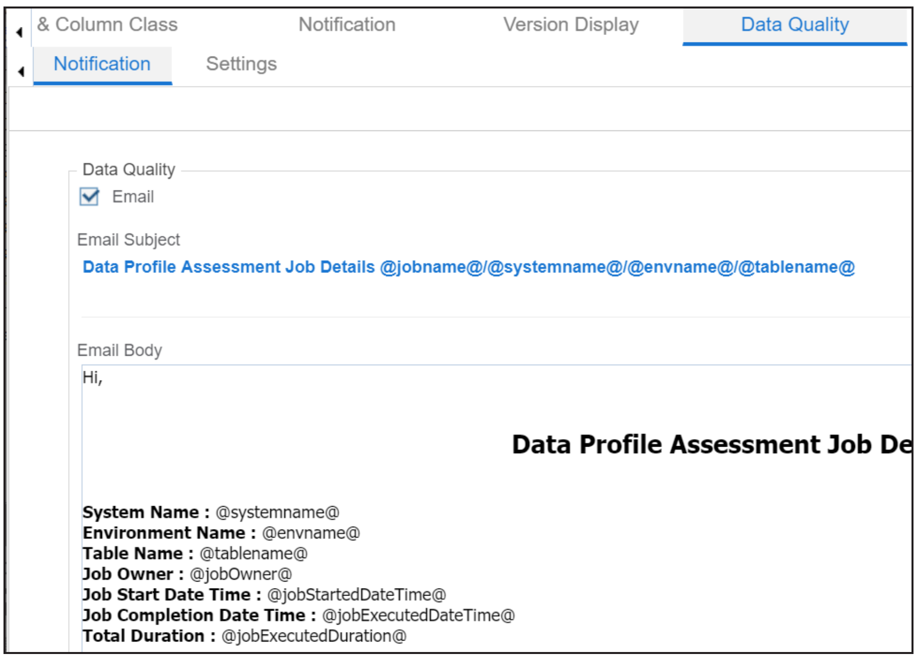
Configuring Notifications on Profiling Data

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.

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.

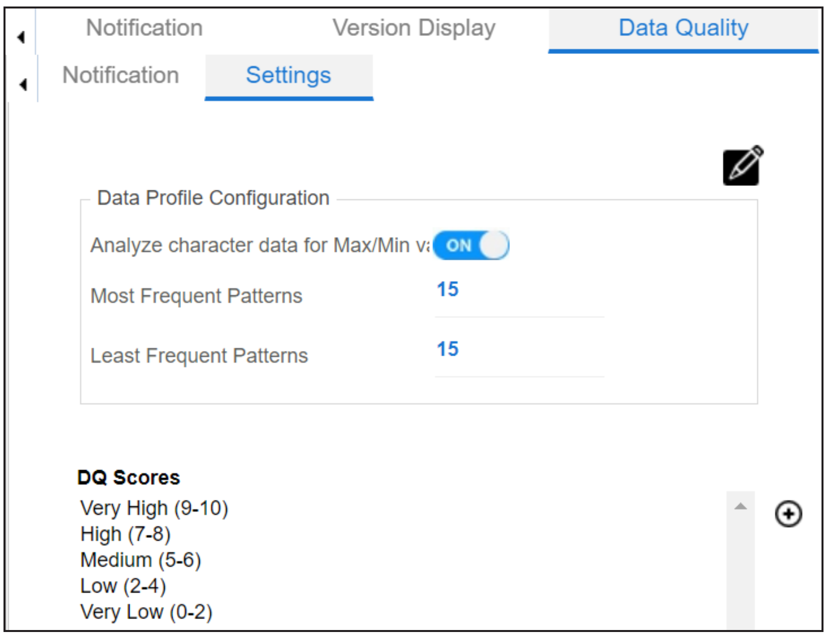
Configuring data profiling parameters involves specifying:

- 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.

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.

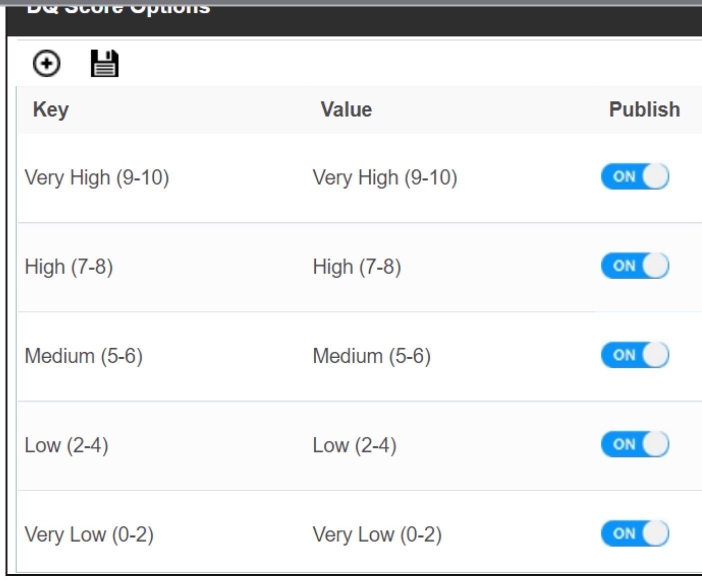
Least Frequent Patterns

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.



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.

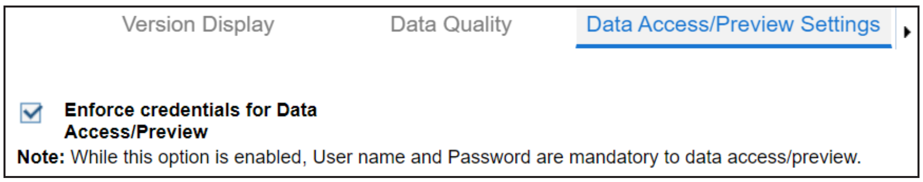
Enforcing Credentials for Data Access or Preview

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.

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.

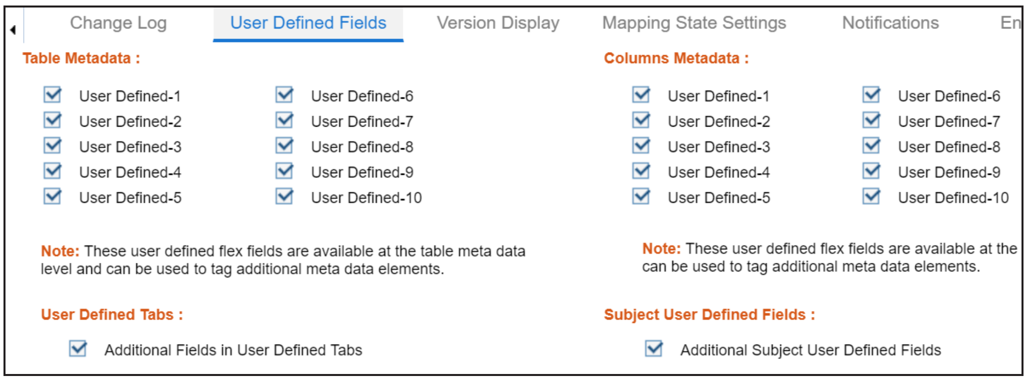
Displaying User Defined Fields

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.



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

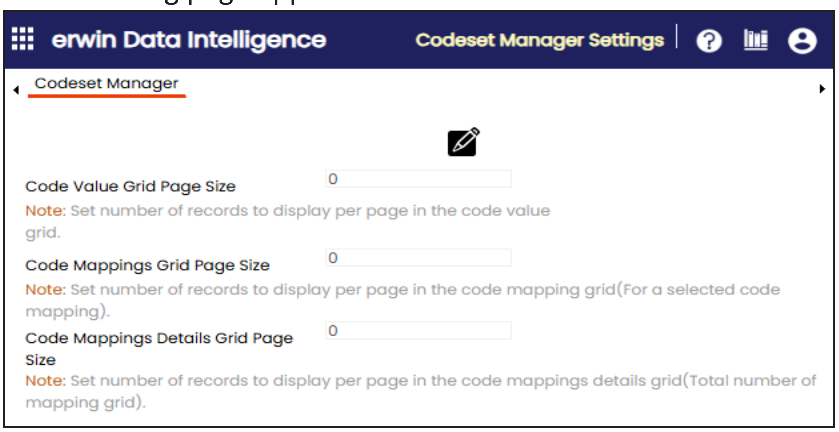
You can configure number of records per page in the Codeset Manager for:

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

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

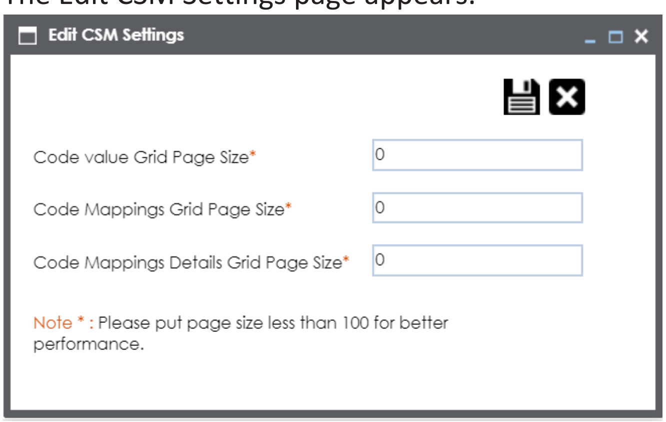
1. Go to **Application Menu** > **Settings** > **Codeset Manager**.

   The following page appears.

2. Click .

   The Edit CSM Settings page appears.

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 ()

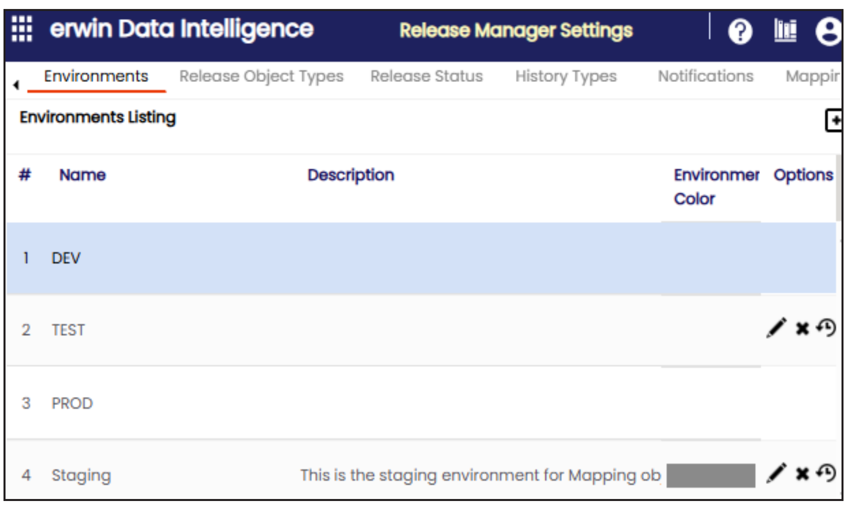
To save the page sizes, click .

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:



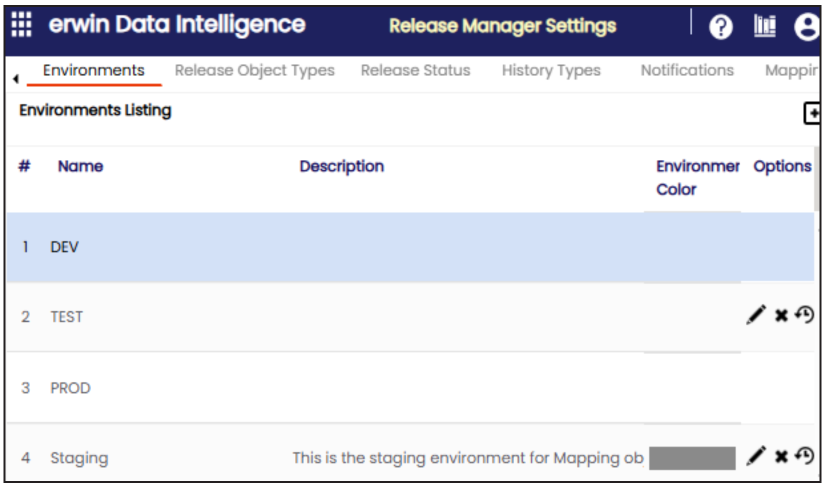
Configuring Environments for Release Objects

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

To configure environments for release objects, follow these steps:

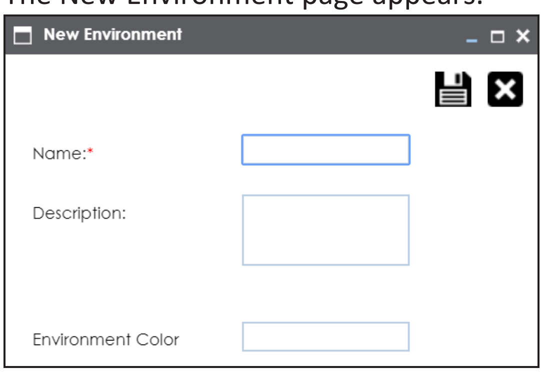
1. Go to **Application Menu** > **Settings** > **Release Manager**.

   The following page appears.

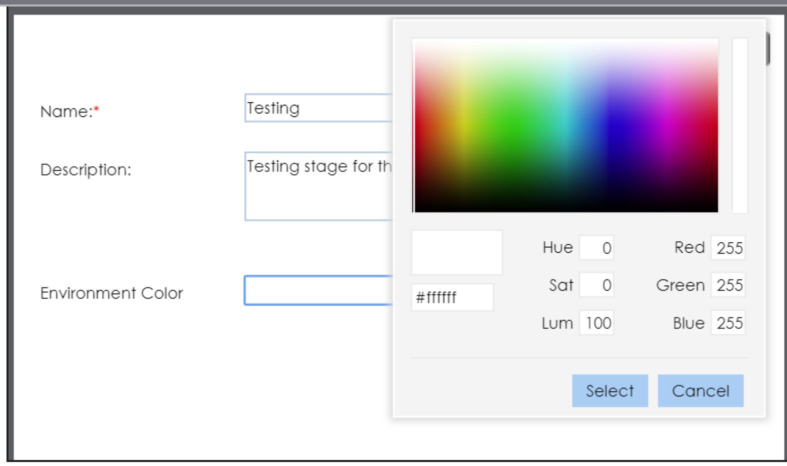
   

2. Click .

   The New Environment page appears.

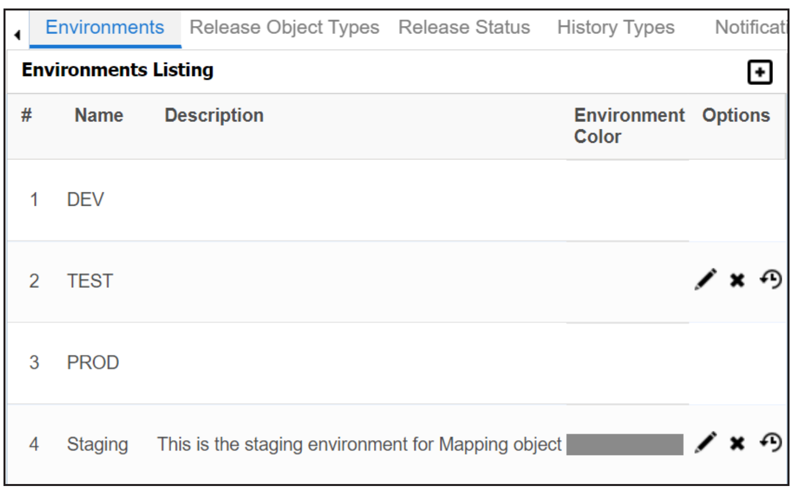
3. Enter the Name and Description.
4. Choose Environment Colour.



5. Click **Select**.

6. Click .

The environment is added.



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:

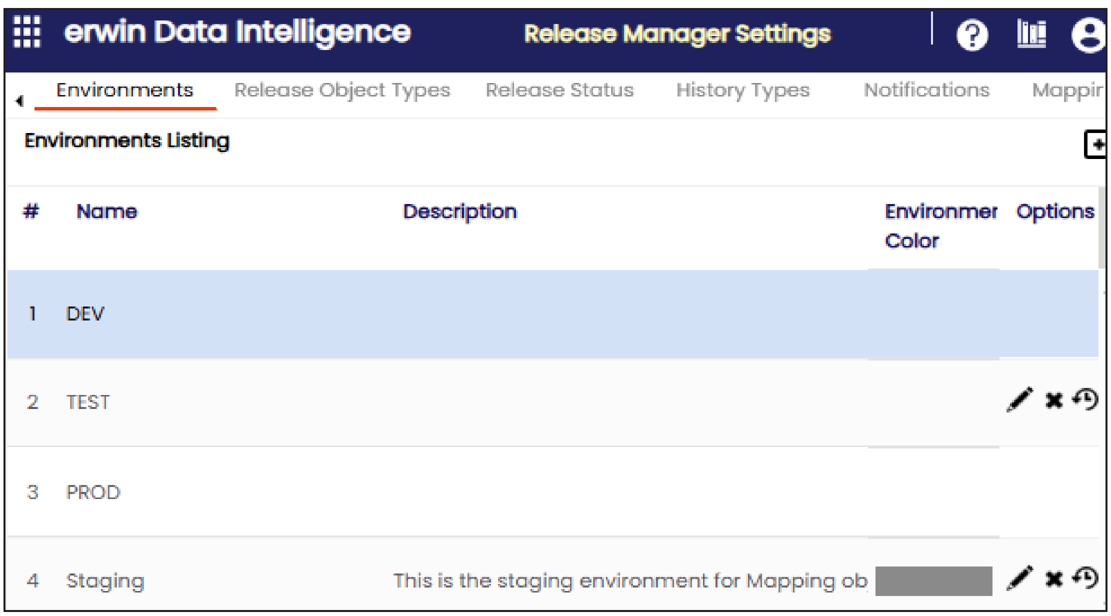
1. Data Item Mapping
2. Codeset
3. Code Mappings

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

To add new release object types, follow these steps:

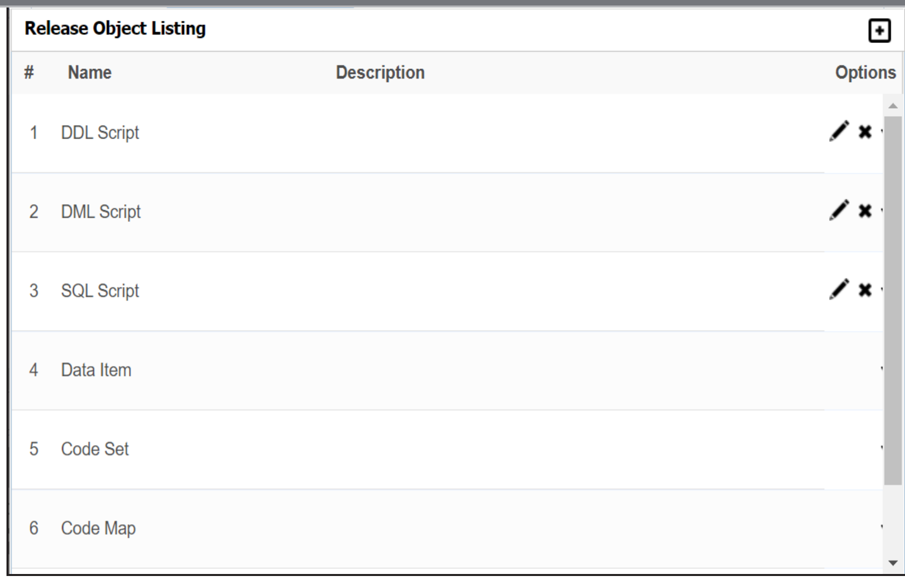
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Release Manager**.

   The following page appears.

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.



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 .

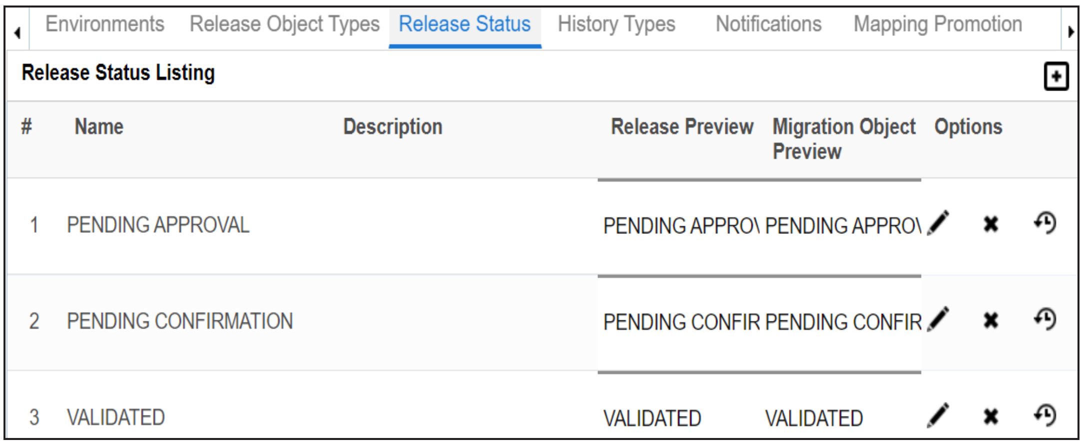
Configuring Release and Release Object Statuses

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:

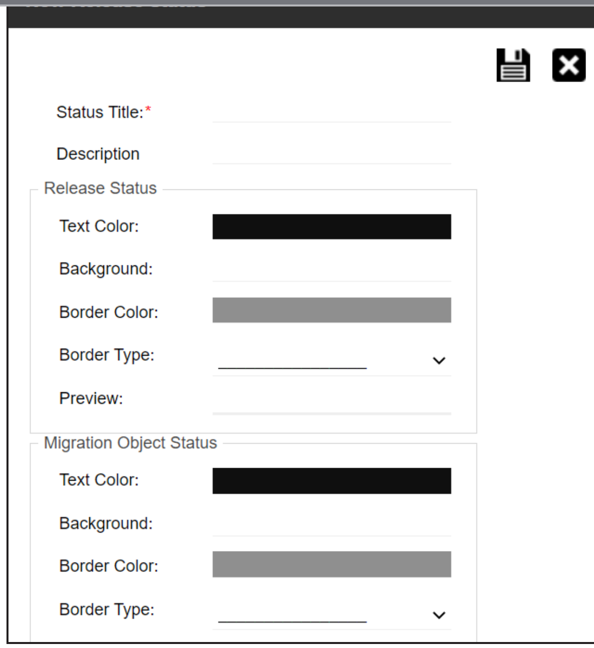
1. Go to **Application Menu** > **Settings** > **Release Manager**.
2. Click Release Status.

   The Release Status Listing appears.

3. Click  to define a new status.

   The New Release Status page appears.



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

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

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 .

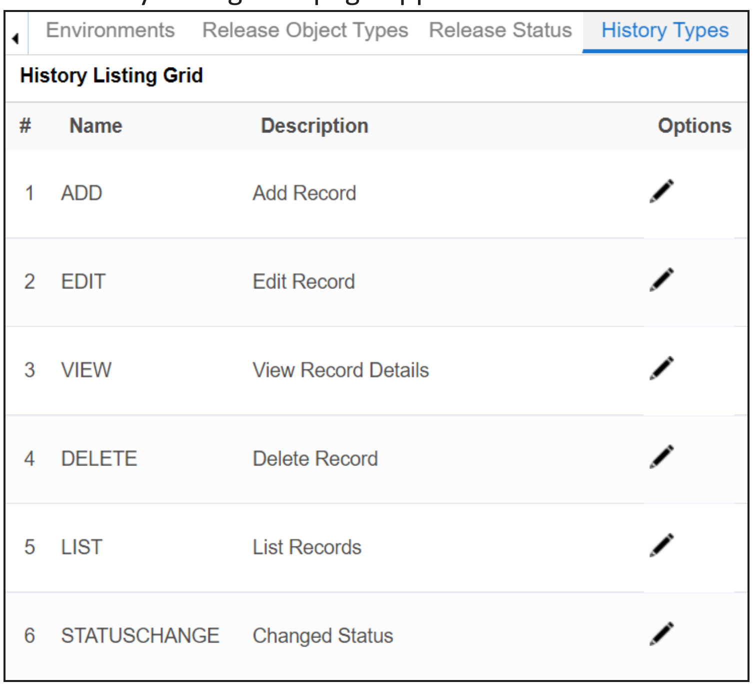
Configuring History Types

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**.

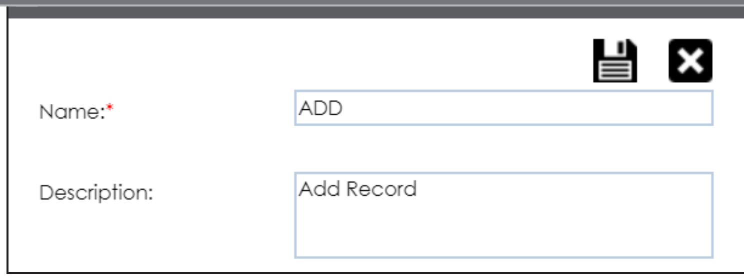
   The History Listing Grid page appears.

#	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.



4. Edit the Description and click .

   The description is saved in the History Listing Grid.

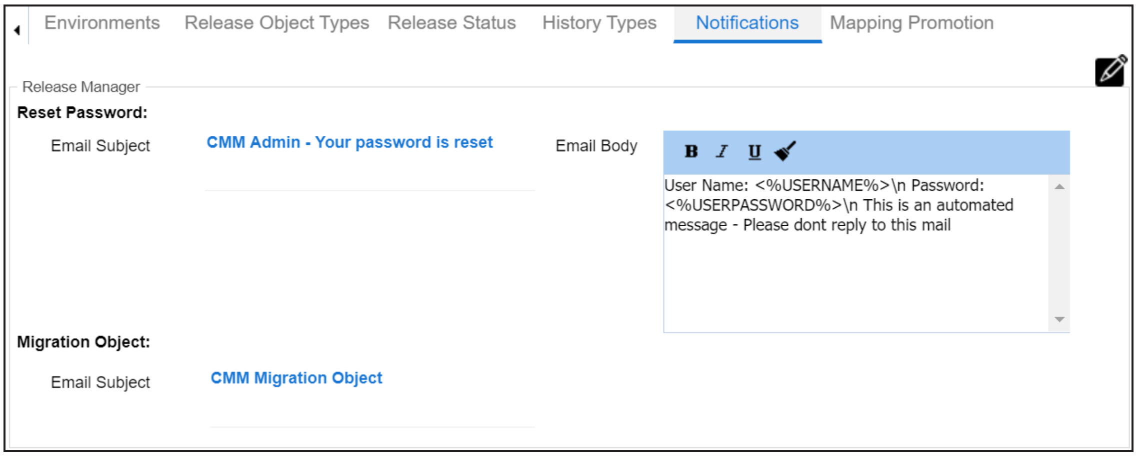
Configuring Notifications about Release Objects

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.

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

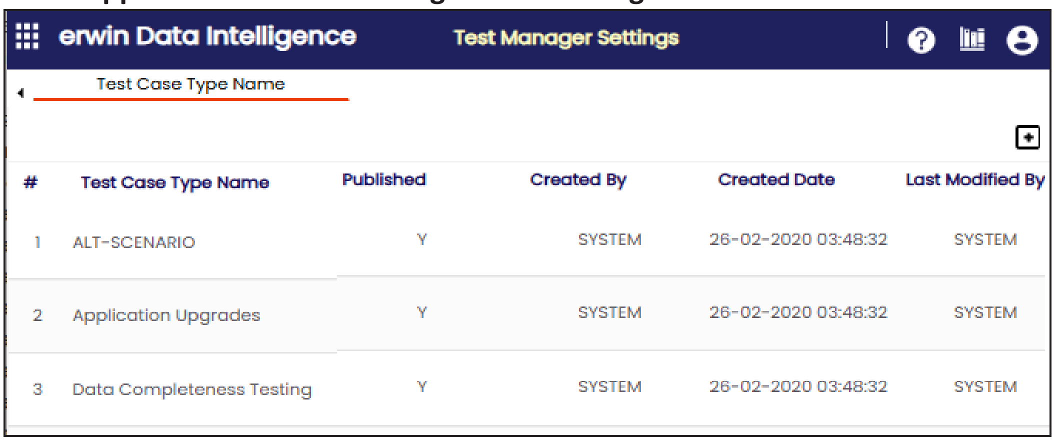
   This email is used to send notifications to any concerned team member from the Admin Email Id which can be configured in Email Settings.

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.

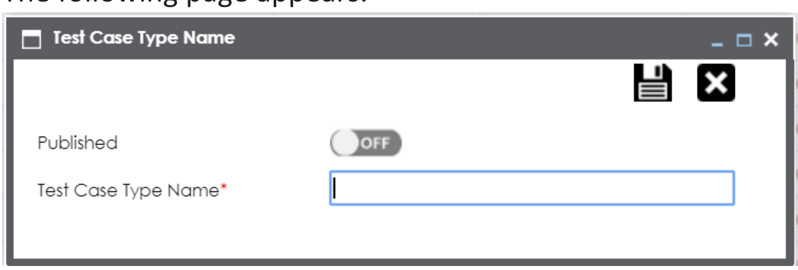
To configure test case types, follow these steps:

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



2. Click .

   The following page appears.



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

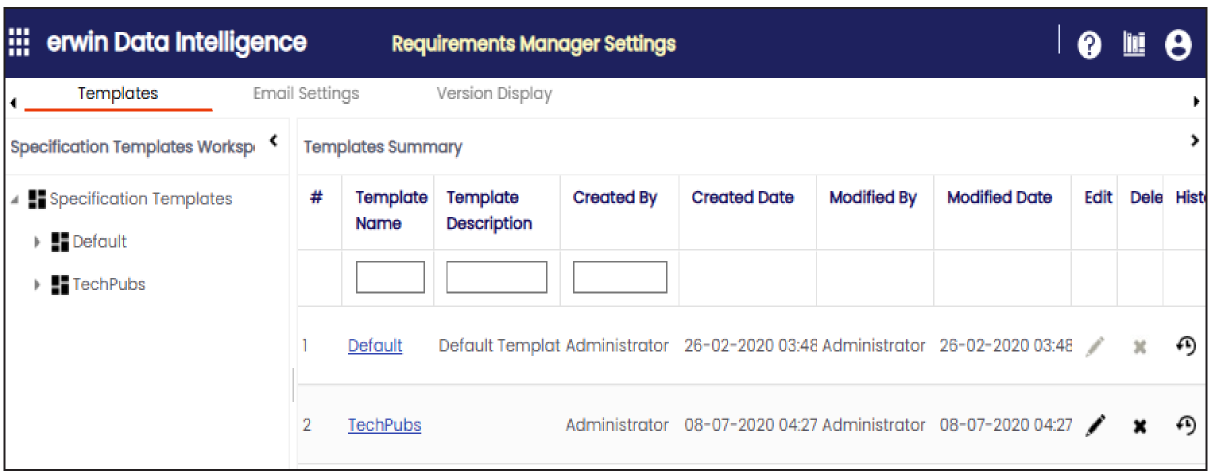
   The new test case type is added to the list.

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:



Creating Templates

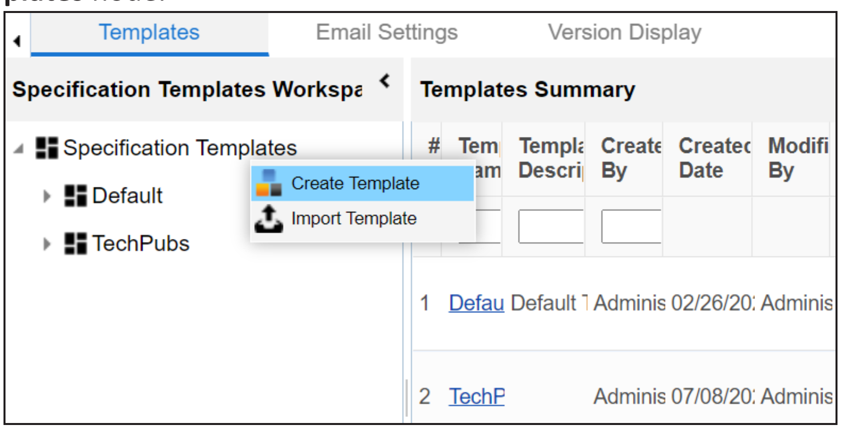
You can create customized requirement templates and use them to create requirement specifications.

To create templates, follow these steps:

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

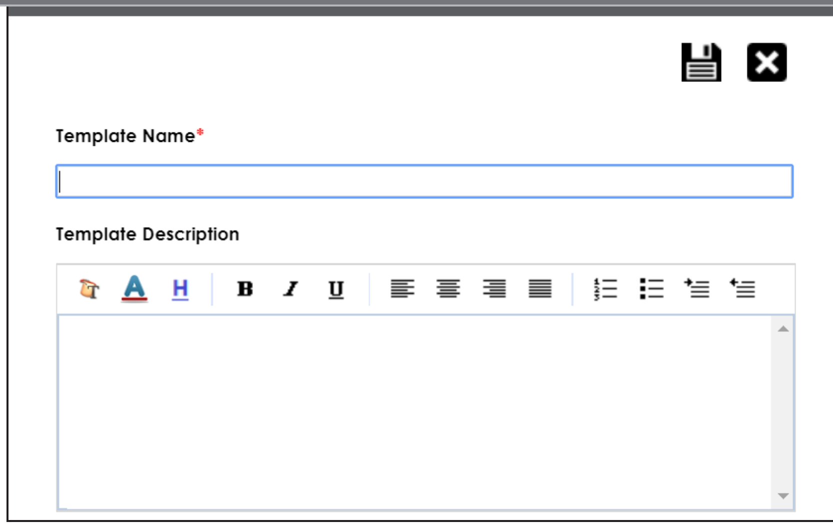
   The Requirements Manager Settings page appears. By default, the Templates settings open.

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



3. Click **Create Template**.

   The Create Template page appears.



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:

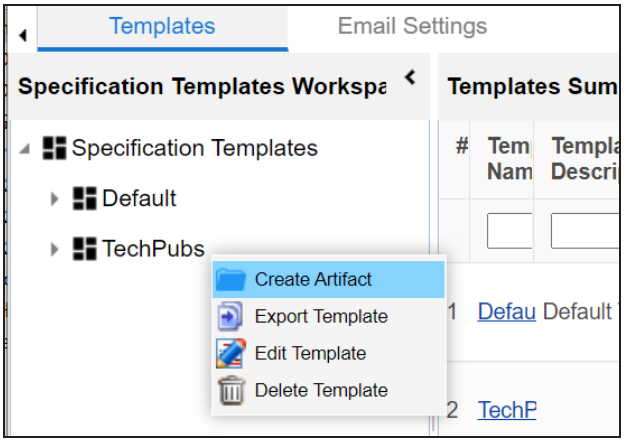
- [Add artifacts to the template]
- [Design custom forms for artifacts]
- [Manage artifacts]
- [Manage templates]

Adding Artifacts to Templates

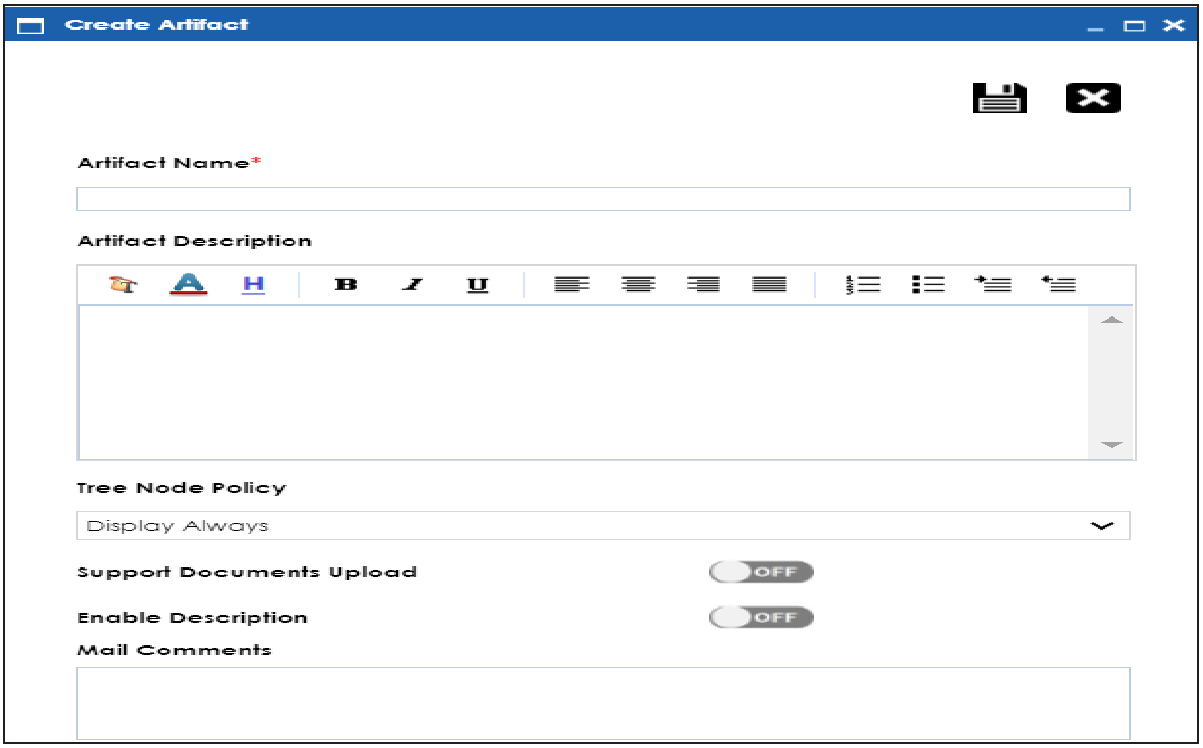
You can enrich a templates with artifacts and supporting documents.

To add artifacts to templates, follow these steps:

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



The Create Artifact page appears.



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

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

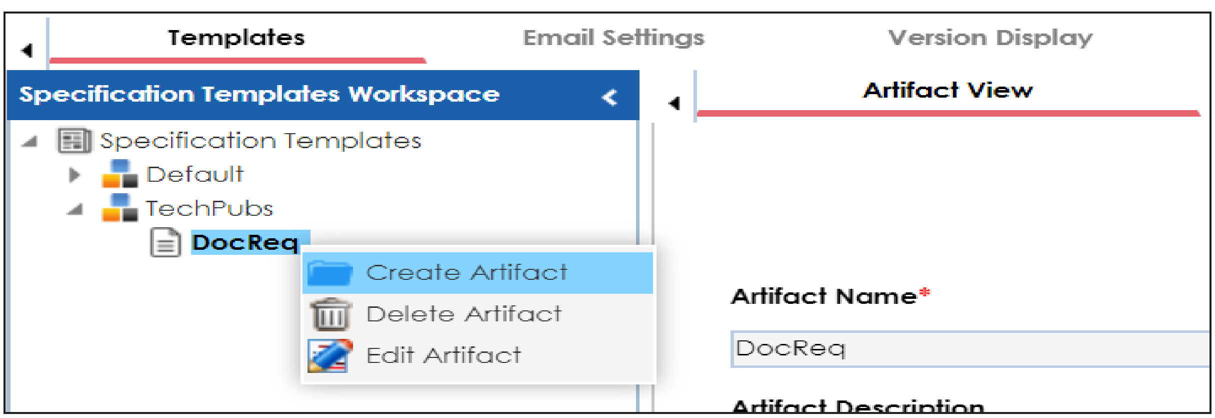
Field Name	Description
	Displays the artifact in the artifact tree. • **Don't display for single child:** Does not display the artifact in the artifact tree. • **Display on multiple child nodes:** Displays artifacts when it has more than one child artifacts.
Support Documents Upload	Enables the document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

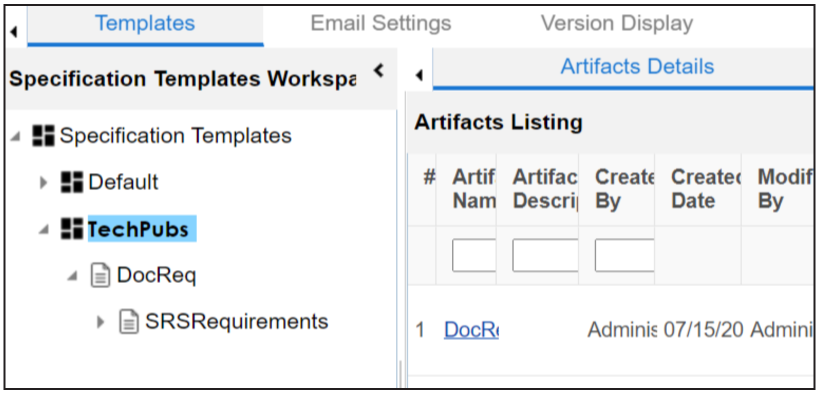


   The Create Artifact page appears.

2. Enter the required fields and click .

Refer to the field description table above.

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



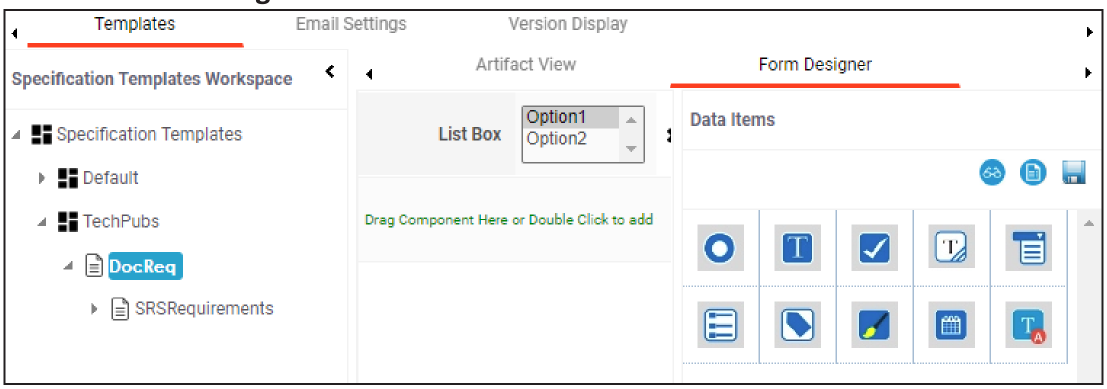
Once you have added an artifact to a template, you can [create custom forms](#) for the artifact.

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:

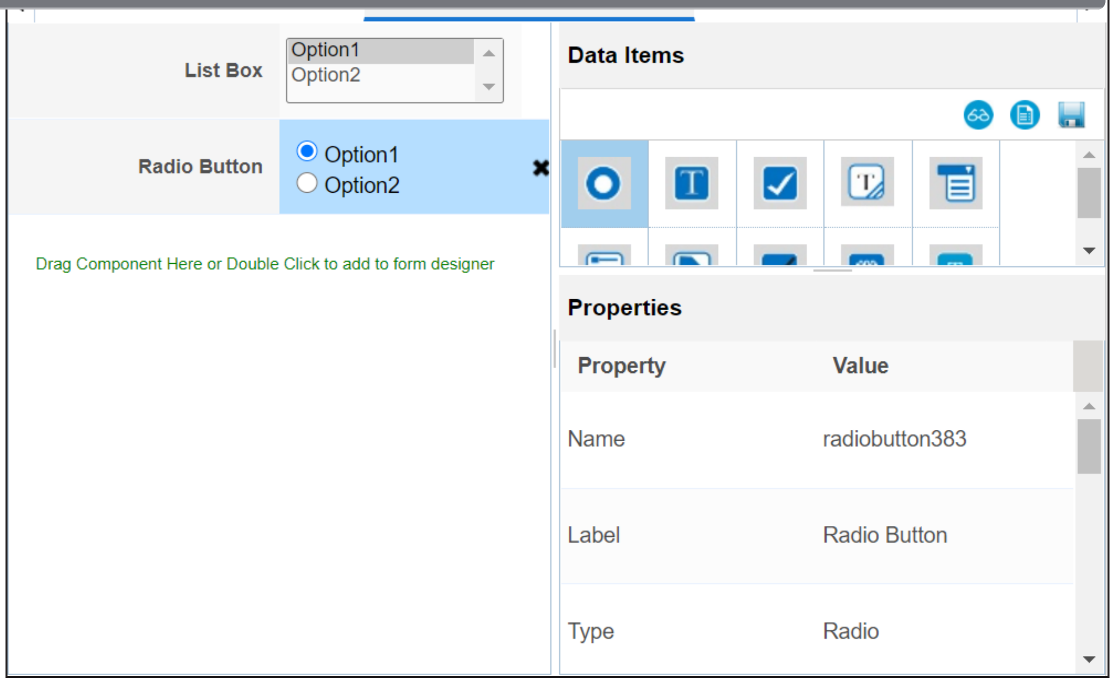
1. In the **Specification Templates Workspace** pane, click an artifact.
2. Click the **Form Designer** tab.



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 filed. For example, Status.
Type	Specifies the type of form field. For example, Combo Box. Double-click the corresponding value cell to select an option.
Visible	Specifies whether the field is visible on the form.

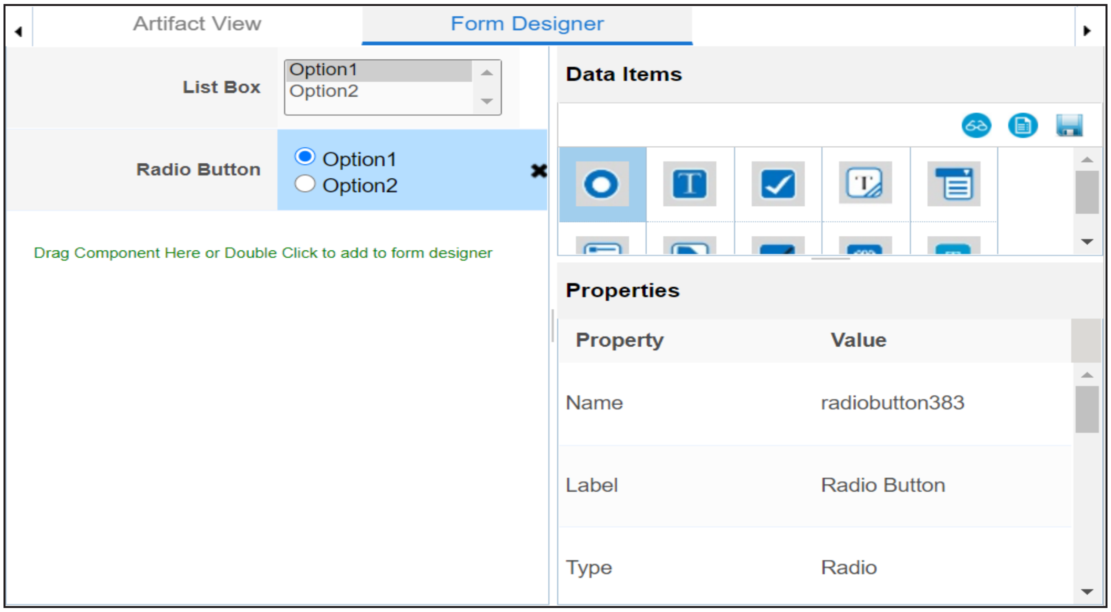
Property	Description
	Select the **Visible** check box to make the field visible on the form.
Enabled	Specifies whether the field is available on the form. Select the **Enabled** check box to enable the field on the form.
Mandatory	Specifies whether the field is mandatory on the form. Select the **Mandatory** 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

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.

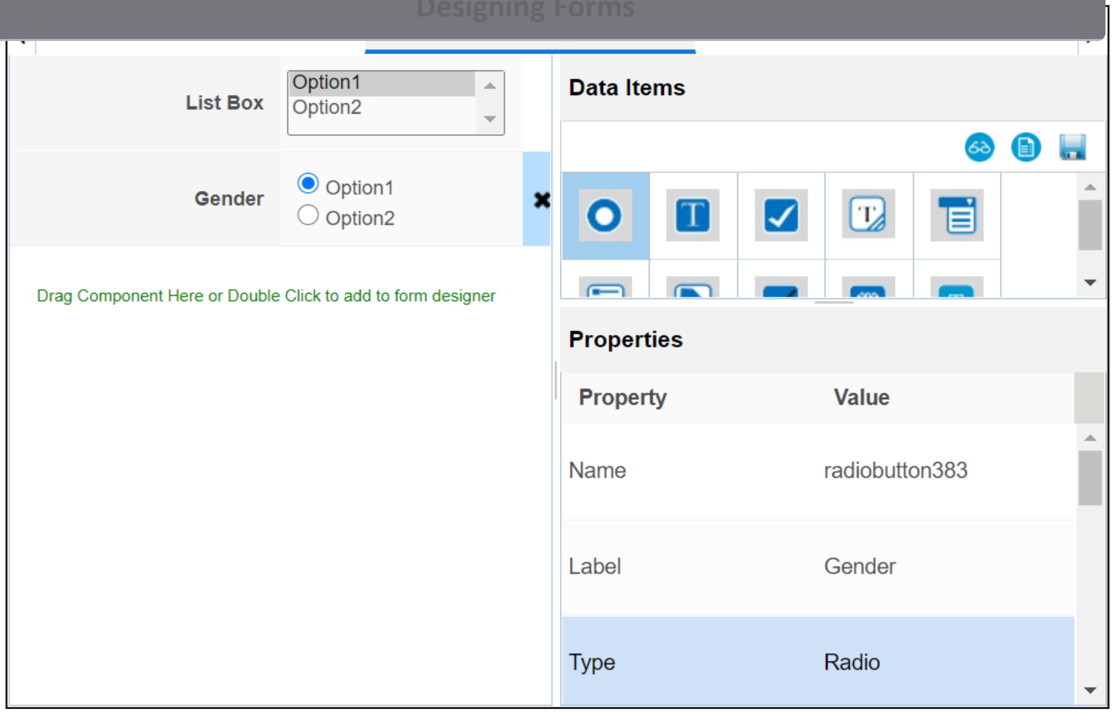


2. Click the cell containing Option 1.

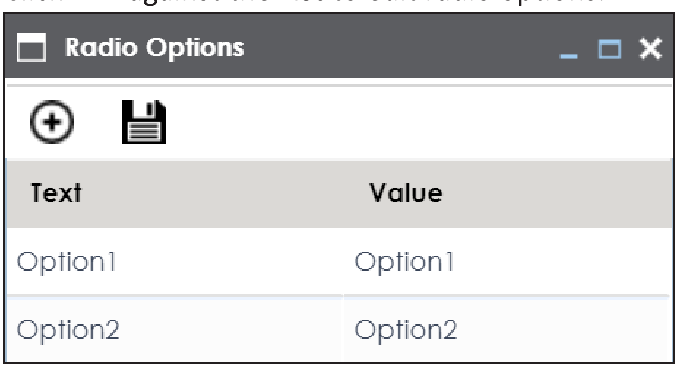
   You can view the properties of the data item.

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.

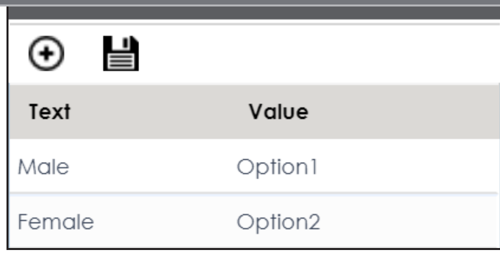


4. Click  against the **List** to edit radio options.



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

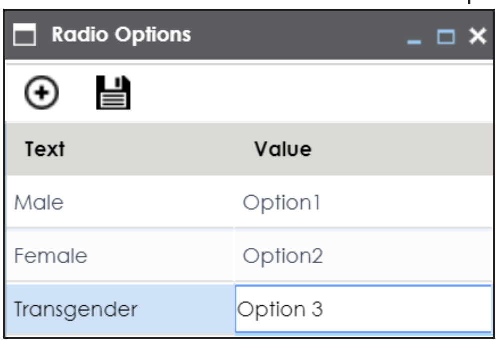
   We edited Option 1 text and Option 2 text and entered Male, and Female respectively.



6. Click to add more options.

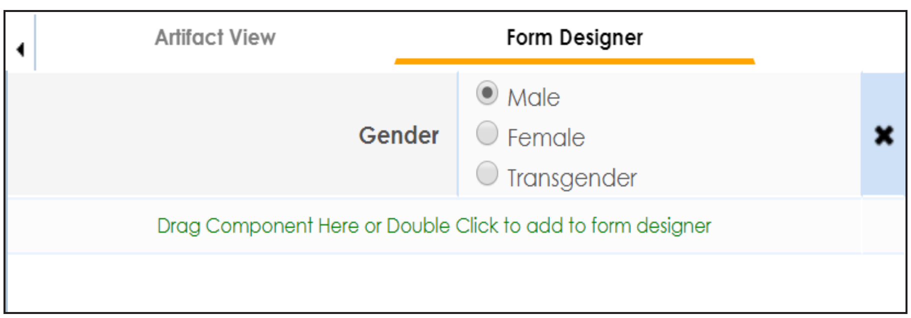
   One row is added.

7. Double-click the cells to enter the option.



8. Click .

   The options in the form are modified.



9. Click .

   The Master Template Option is saved.

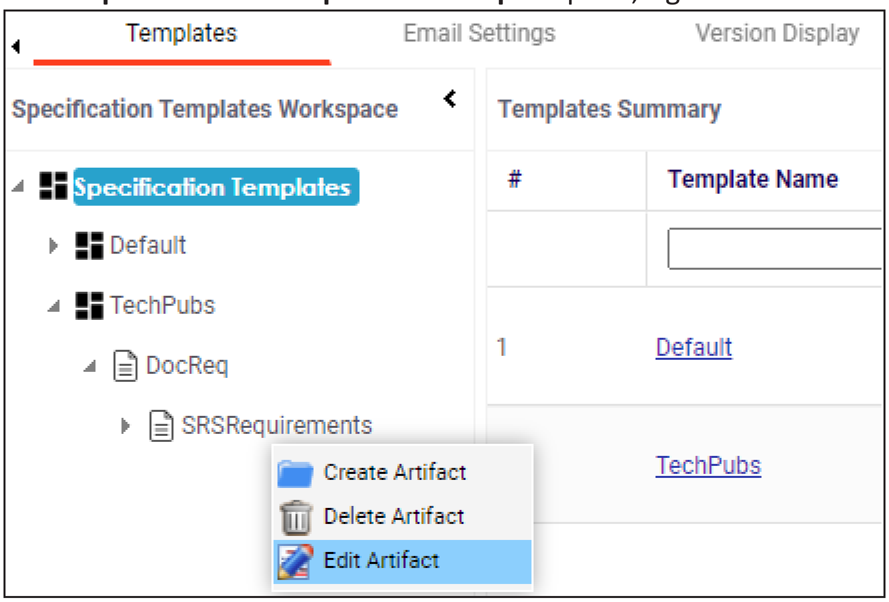
Managing Artifacts

Managing artifacts involves:

- Editing artifacts
- Deleting artifacts

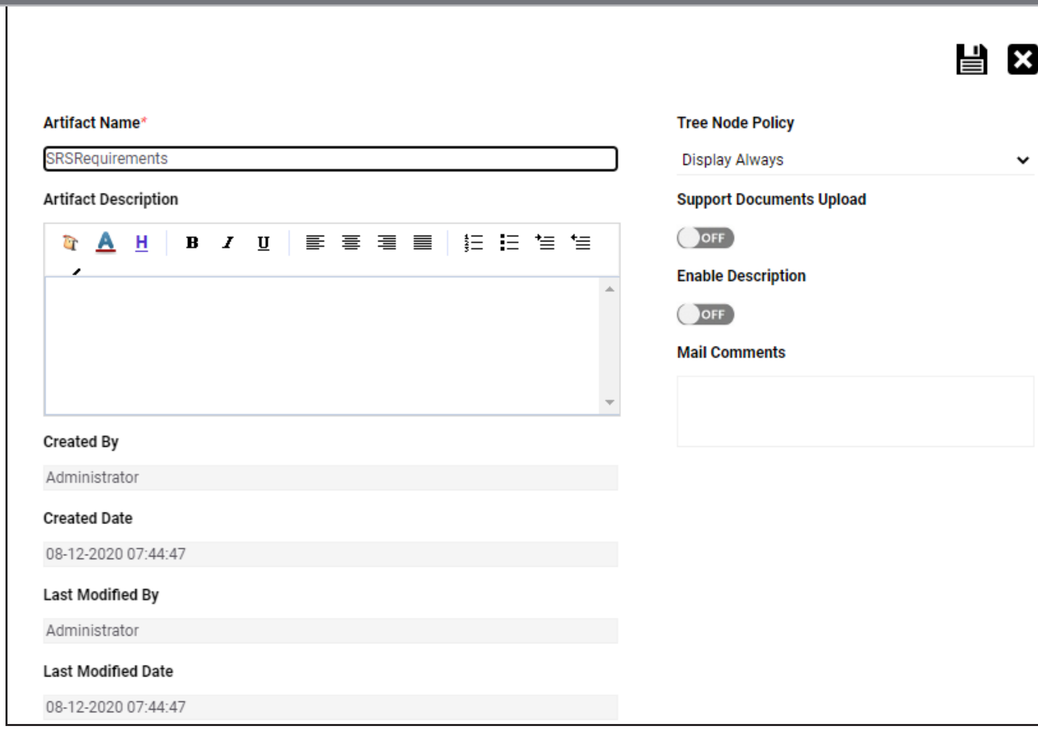
To edit artifacts, follow these steps:

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



2. Click **Edit Artifact**.

   The Artifact View tab appears in editable mode.



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.

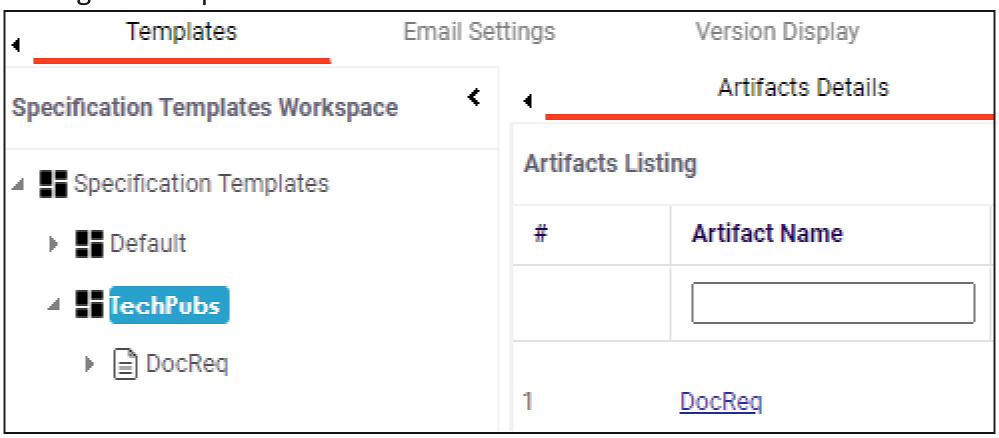
Managing Templates

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.

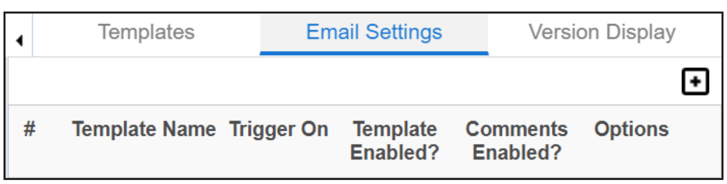
The actions can be Add, Delete, Edit, Version, or Copy. For each object-action combination, you can configure a custom email template.

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:

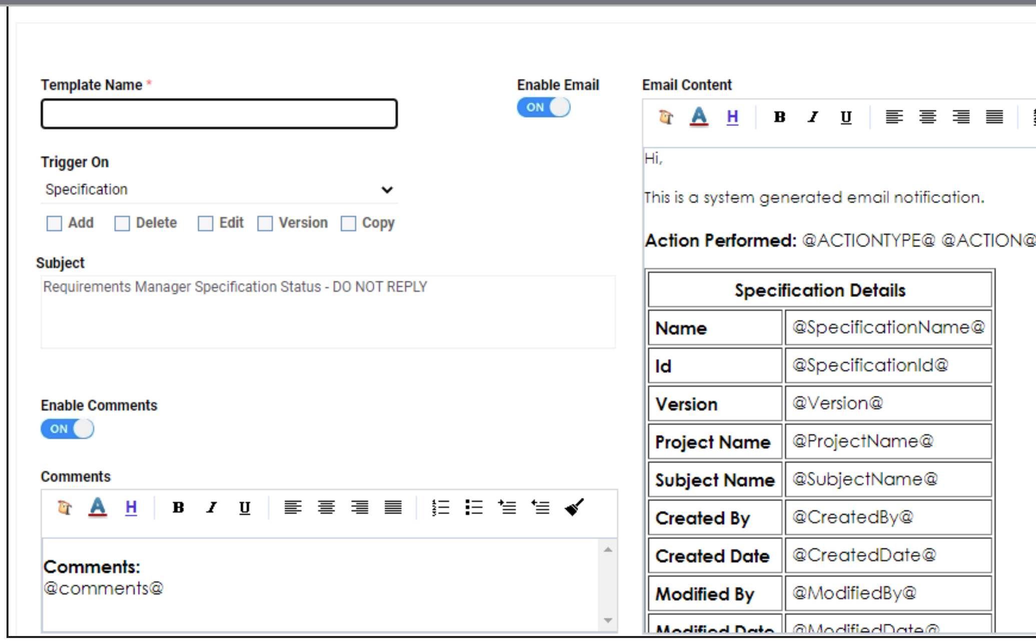
1. Go to **Application Menu** > **Settings** > **Requirements Manager**
2. Click the **Email Settings** tab.

   The following page appears.

3. Click .

   The Email Template page appears.



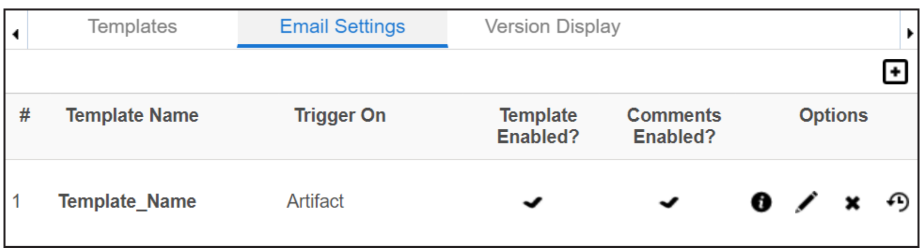
4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
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.

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.



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 ( )

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.

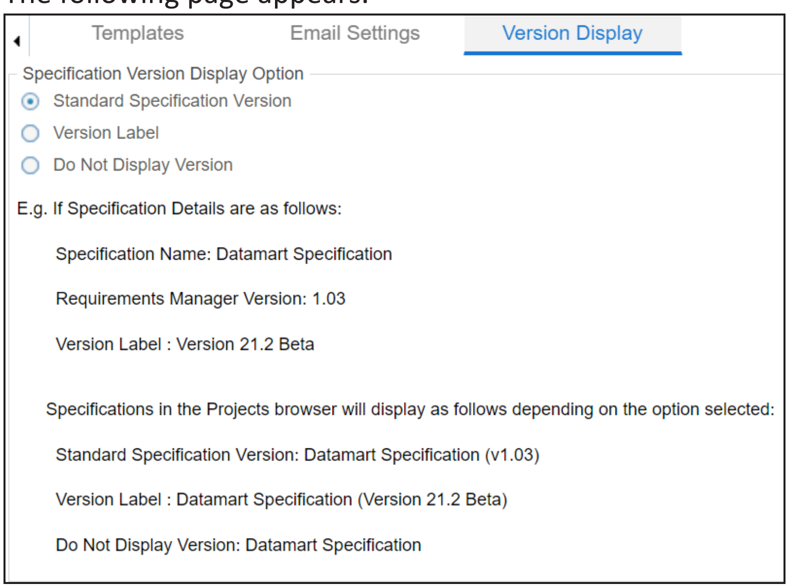
   For example, Data_Mart (erwin_Mart) where Data_Mart is the specification name and erwin_Mart is the Version Label.

   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.



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

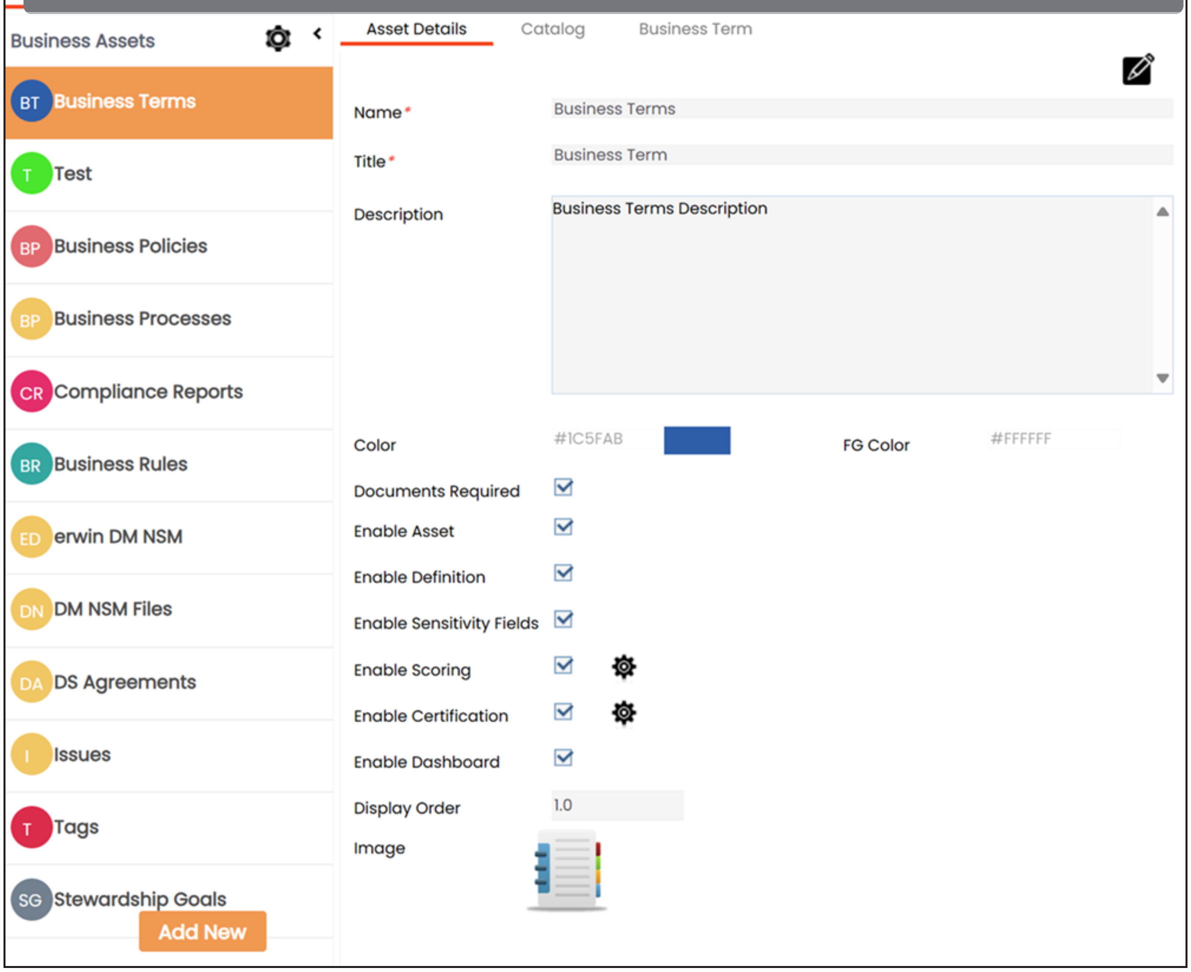
On the Business Glossary Manager & Data Marketplace Settings page, you can set up the following:

- 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.

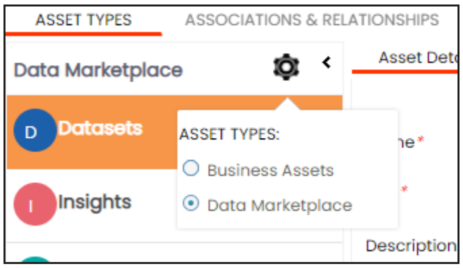
To access Business Glossary Manager & Data Marketplace settings, go to **Application Menu** > **Settings** > **Business Glossary Manager & Data Marketplace**. The Business Glossary Manager & Data Marketplace Settings page appears.


Business Assets
Business Terms
Test
Business Policies
Business Processes
Compliance Reports
Business Rules
erwin DM NSM
DM NSM Files
DS Agreements
Issues
Tags
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.

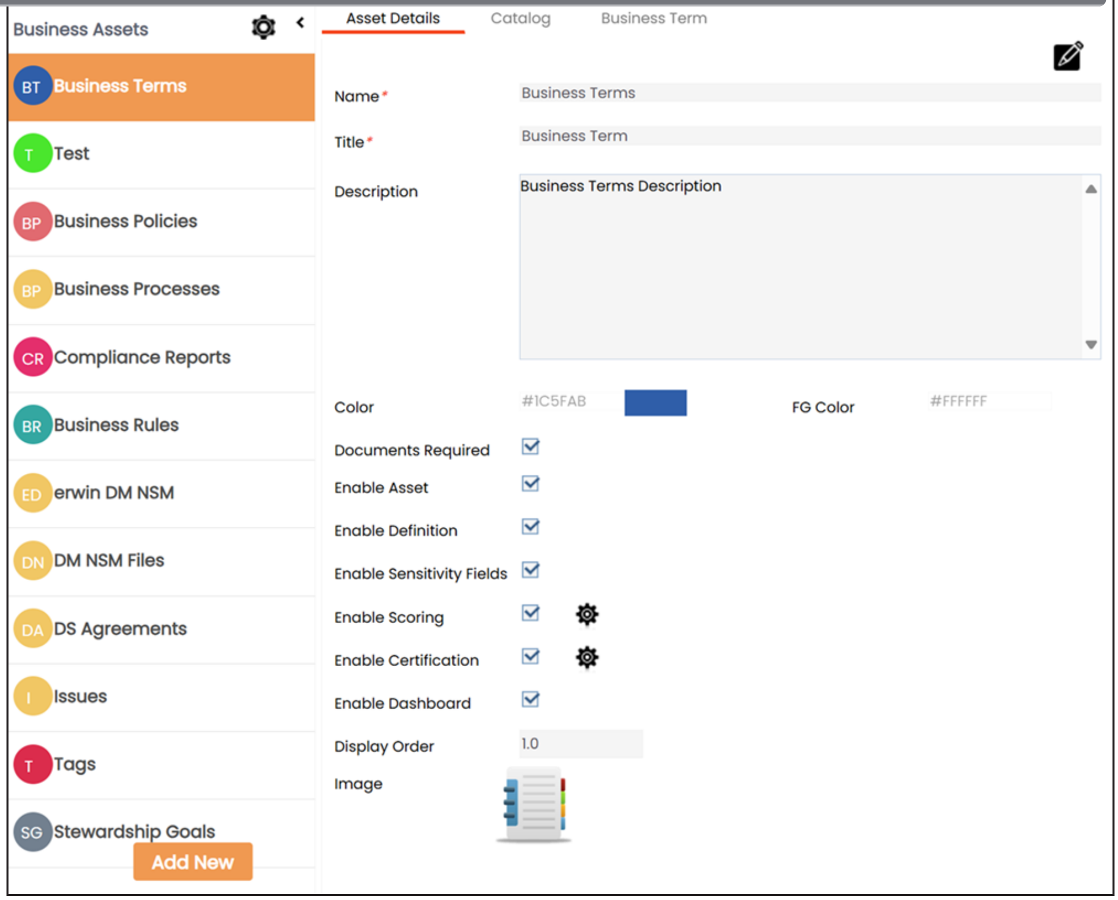
By default, the business assets configuration page appears. To configure and manage marketplace assets, in the Business Assets pane, click and then select **Data Marketplace**. The asset type switches to Data Marketplace.



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.



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.

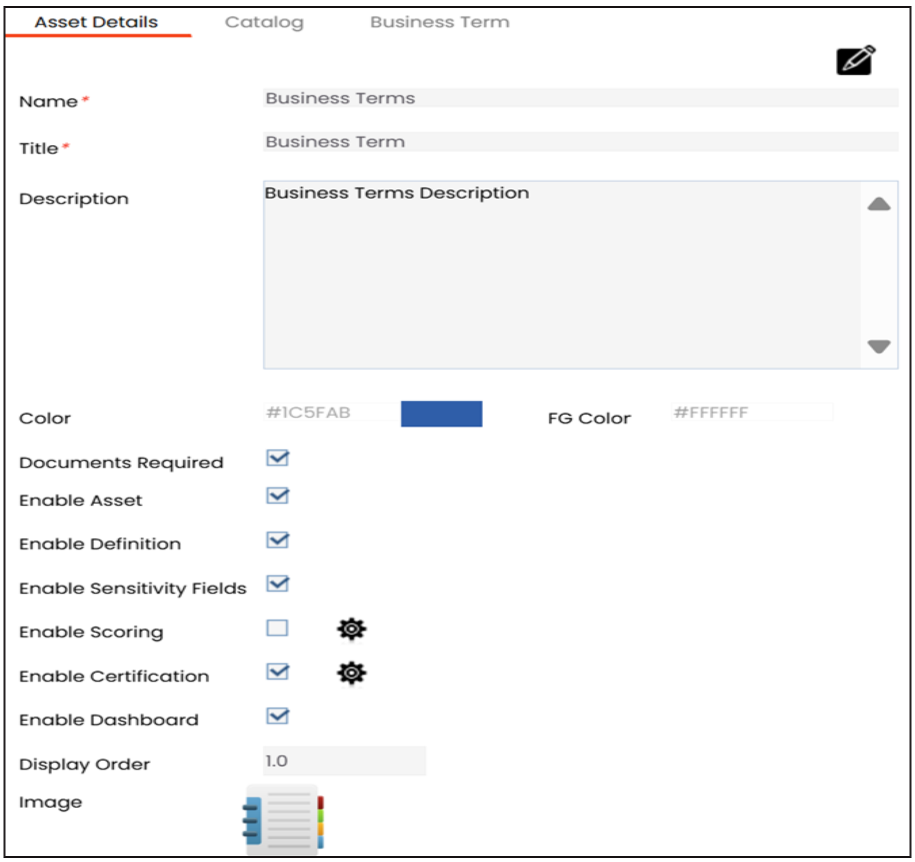
Configuring Asset Details

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 .



2. Edit the settings appropriately.

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

- 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-

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 .

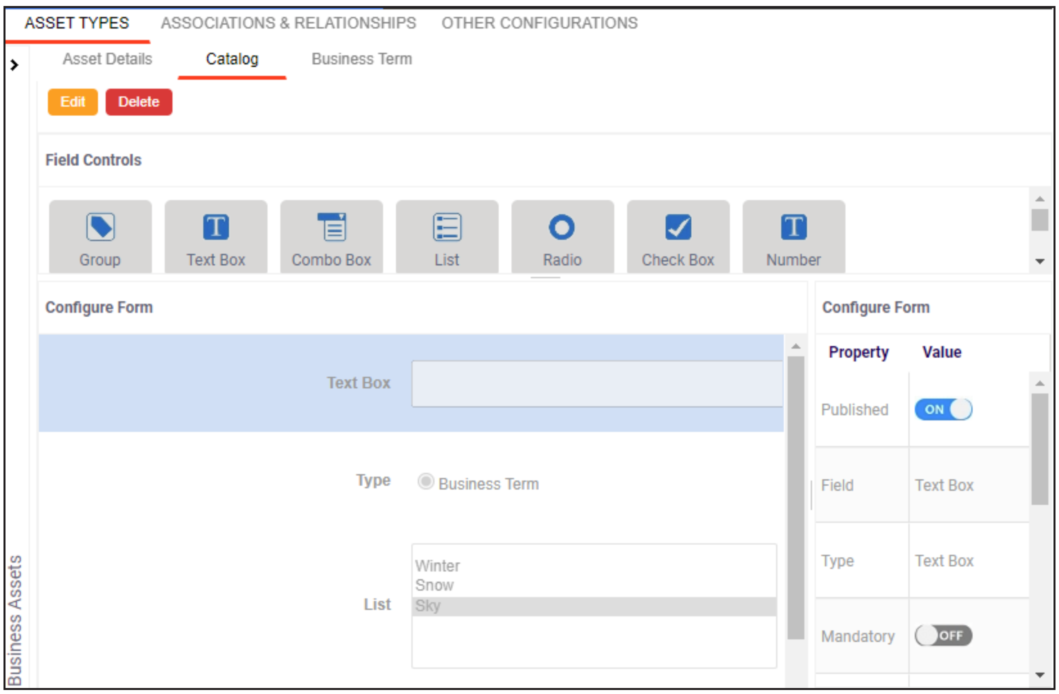
Configuring Catalog Form

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**.

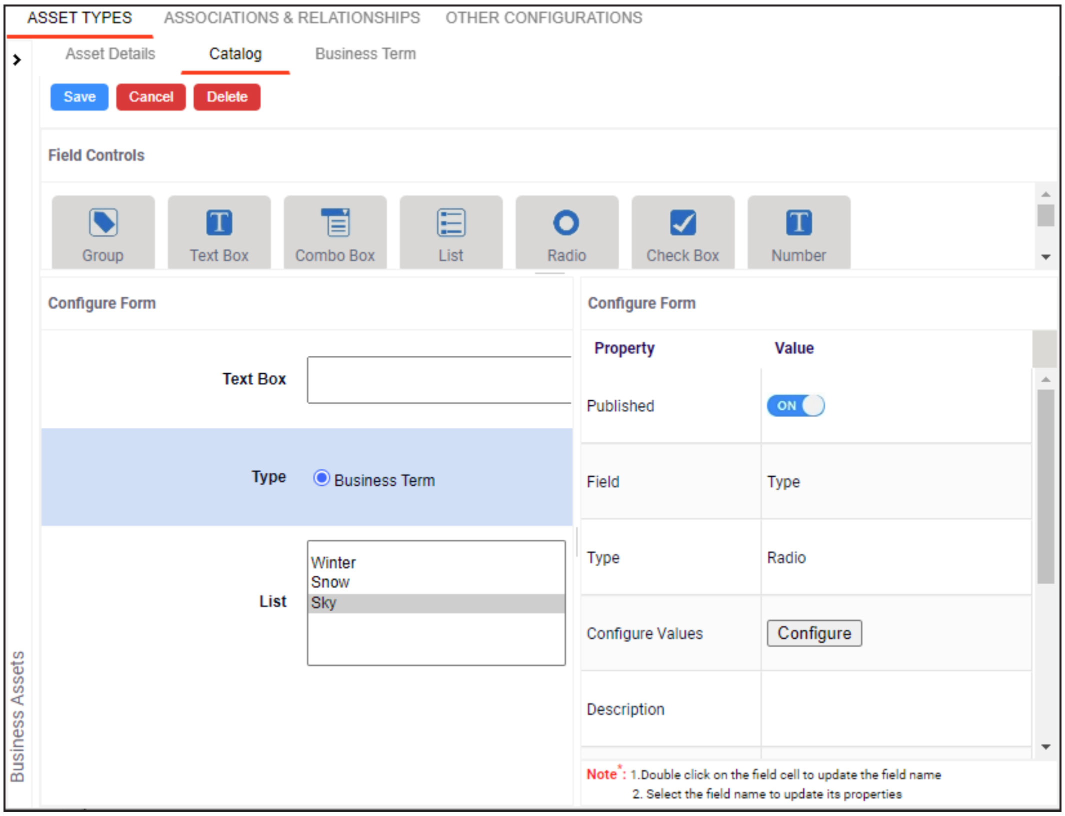


The Catalog tab contains the following sections:

- **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.

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:

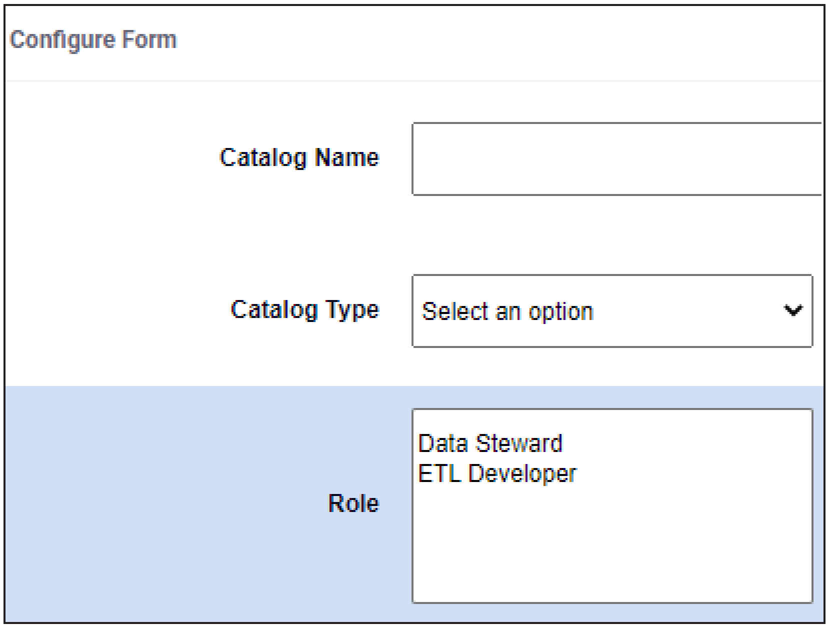
Property	Description
Published	Switch **Published** to **ON** to publish the field.

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.

4. Once, you have designed the form and configured the properties of all the UI elements, click **Save**.
   The changes you made are available on the catalog or category creation page in the

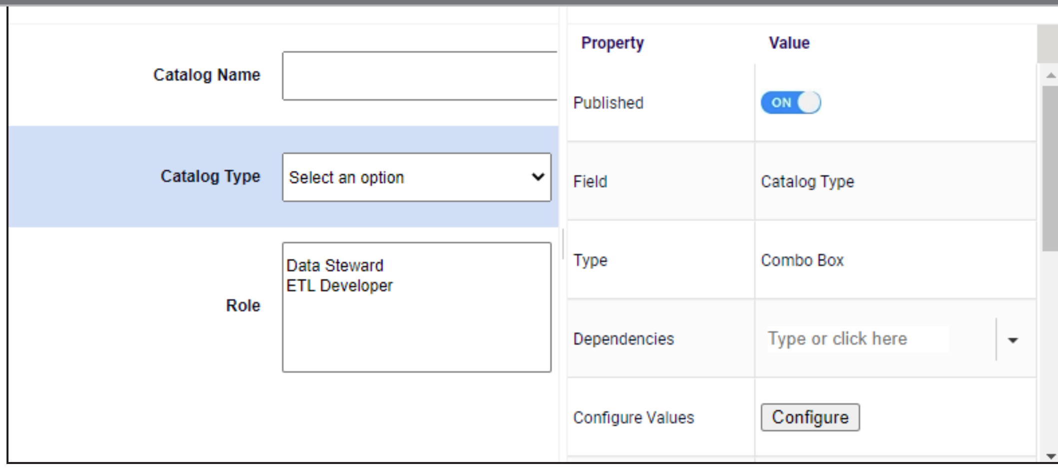
Creating Catalogs topic.

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

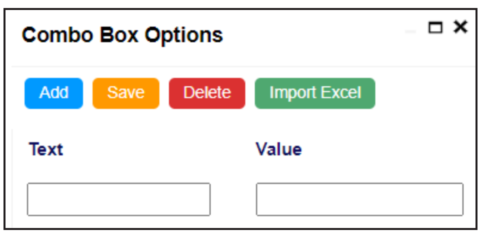


To understand property configuration, for example, follow these steps to configure the Catalog Type combo box:

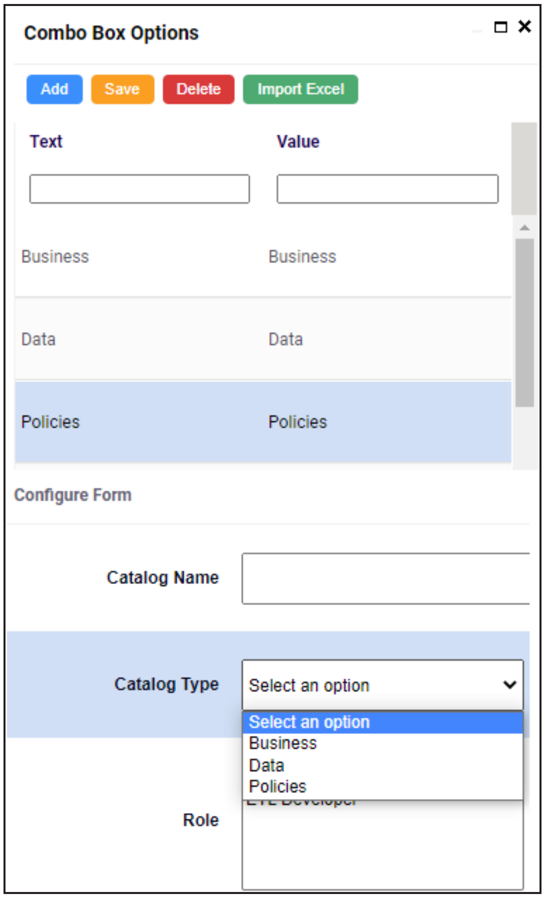
1. Select the Catalog Type element.
   Its properties appear in the Properties pane.



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



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

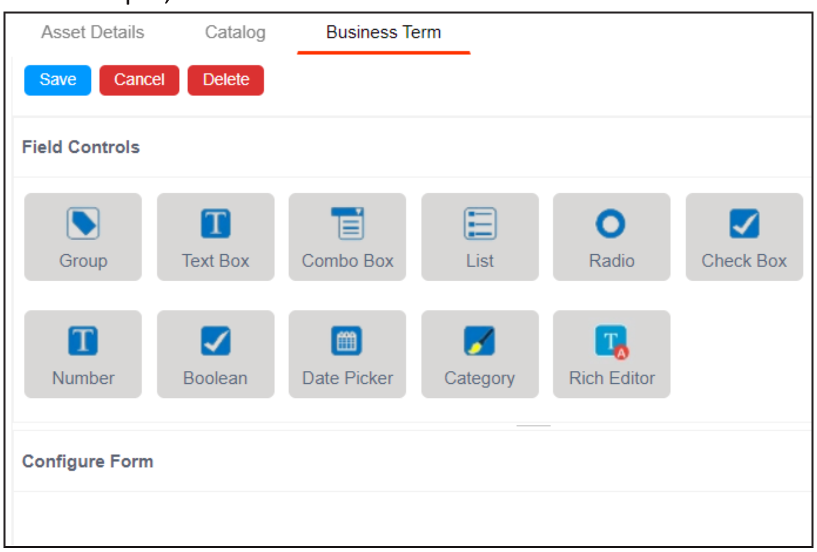

Combo Box Options
Add
Save
Delete
Import Excel
Text
Value
Business
Business
Data
Data
Policies
Policies
Configure Form
Catalog Name
Catalog Type
Select an option
Select an option
Business
Data
Policies
Role

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:

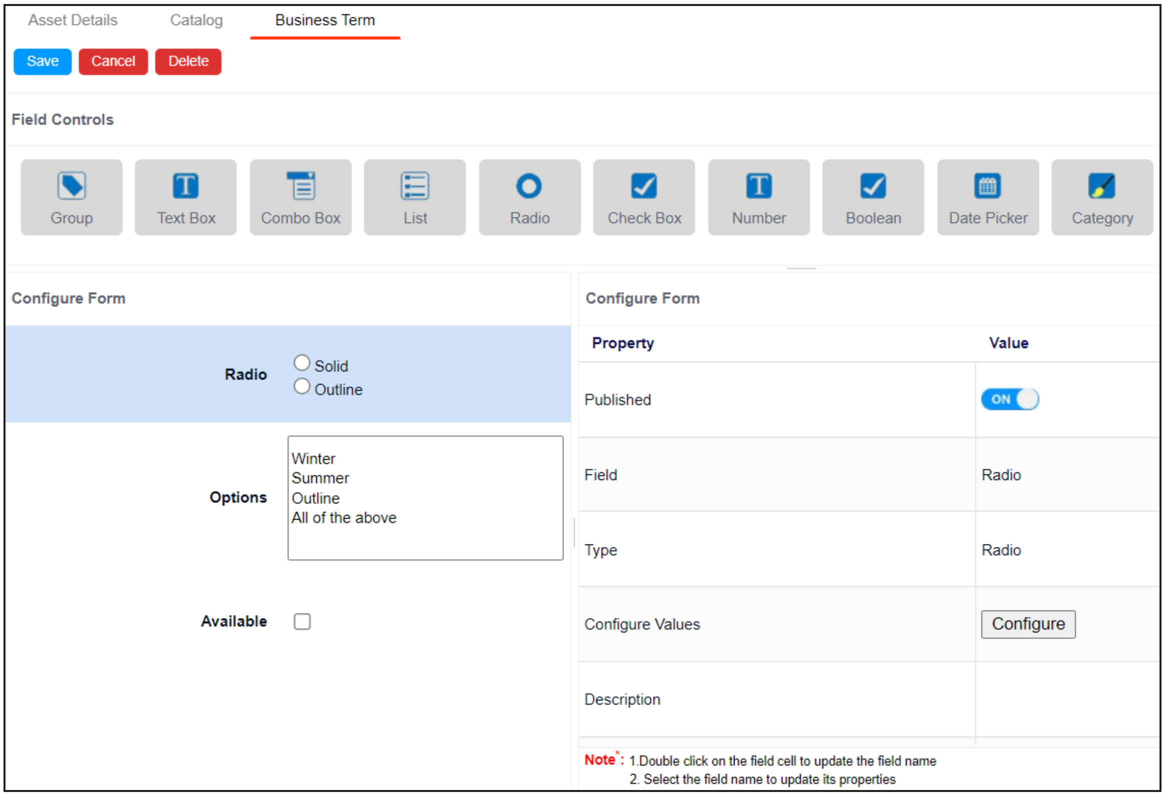
1. On the <Asset Name> tab, click **Edit**.
   For example, click **Edit** on the Business Term tab.
   

   The <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.

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:

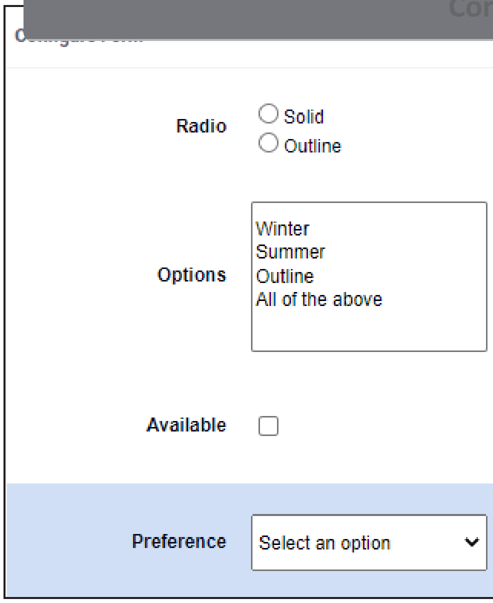
Property	Description
Published	Switch **Published** to **ON** to publish the field.

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.

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.

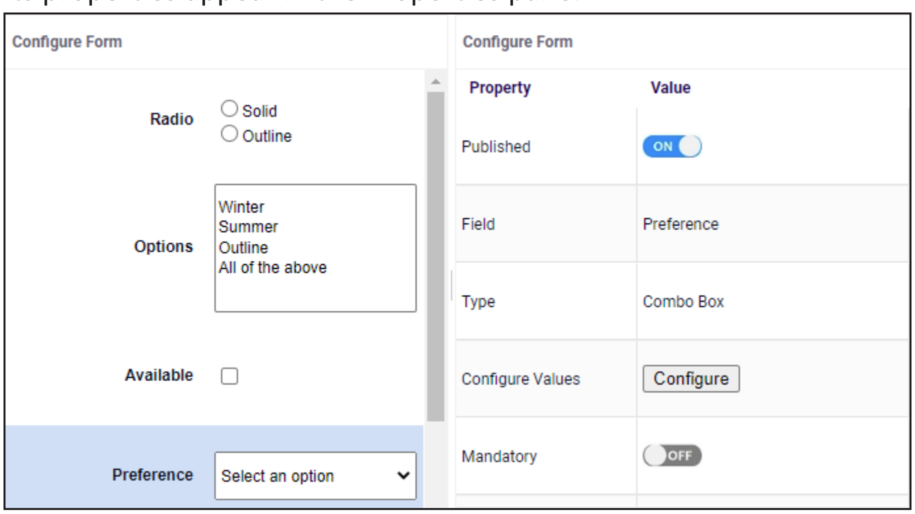
4. Once, you have designed the form and configured the properties of all the UI elements, click **Save**.
   The changes you made are available on the asset creation page in the Business Glossary Manager. For more information on creating business assets, refer to the Business Glossary Manager topic.

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

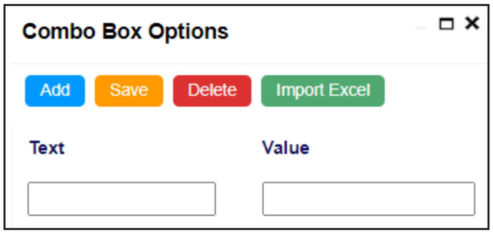


To understand property configuration, for example, follow these steps to configure the Preferences combo box:

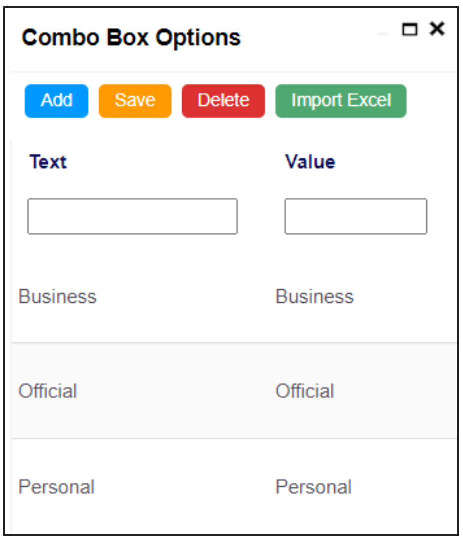
1. Select the Preference element.
   Its properties appear in the Properties pane.



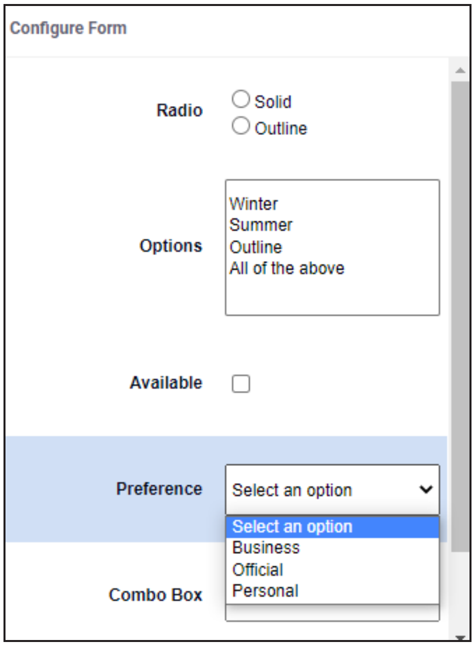
2. Click **Configure**.
   The Combo Box Options page appears. Use this page to add items to the Preference



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 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

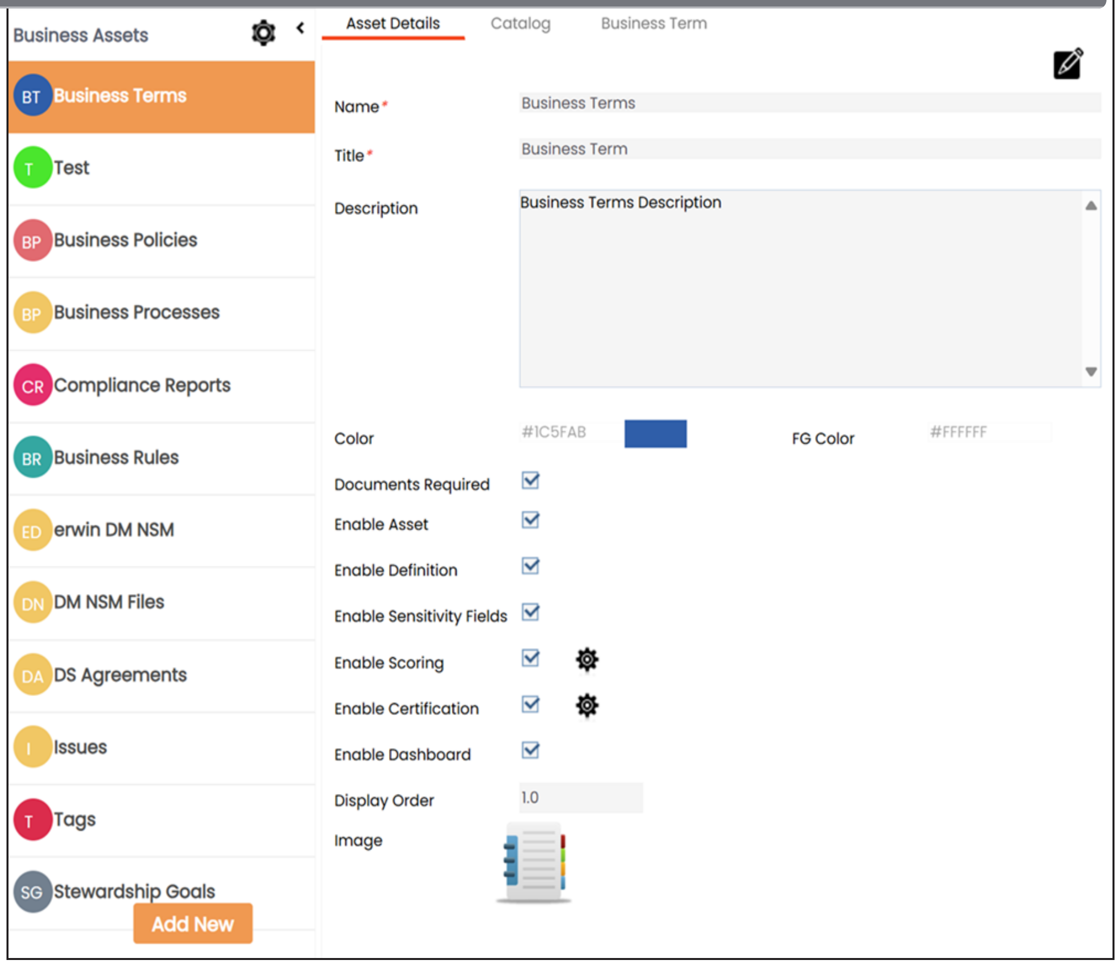
Adding Asset Types

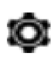
Based on your organization's requirements, you can create custom asset types to supplement the default asset types available in Business Glossary Manager (Business Term, Business Policy, and Business Rule), and Data Marketplace (Datasets, Insights, and AI Models).

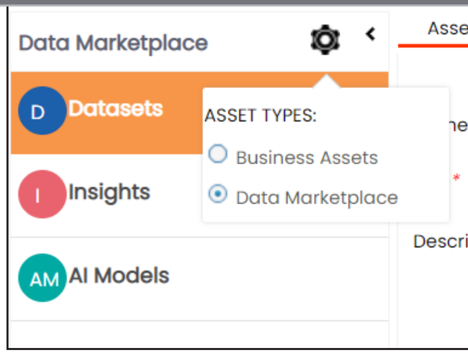
The following steps walk you through adding a business asset to Business Glossary Manager. Similarly, you can create custom marketplace assets and these assets will be available in the Data Marketplace.

To add custom asset types, follow these steps:

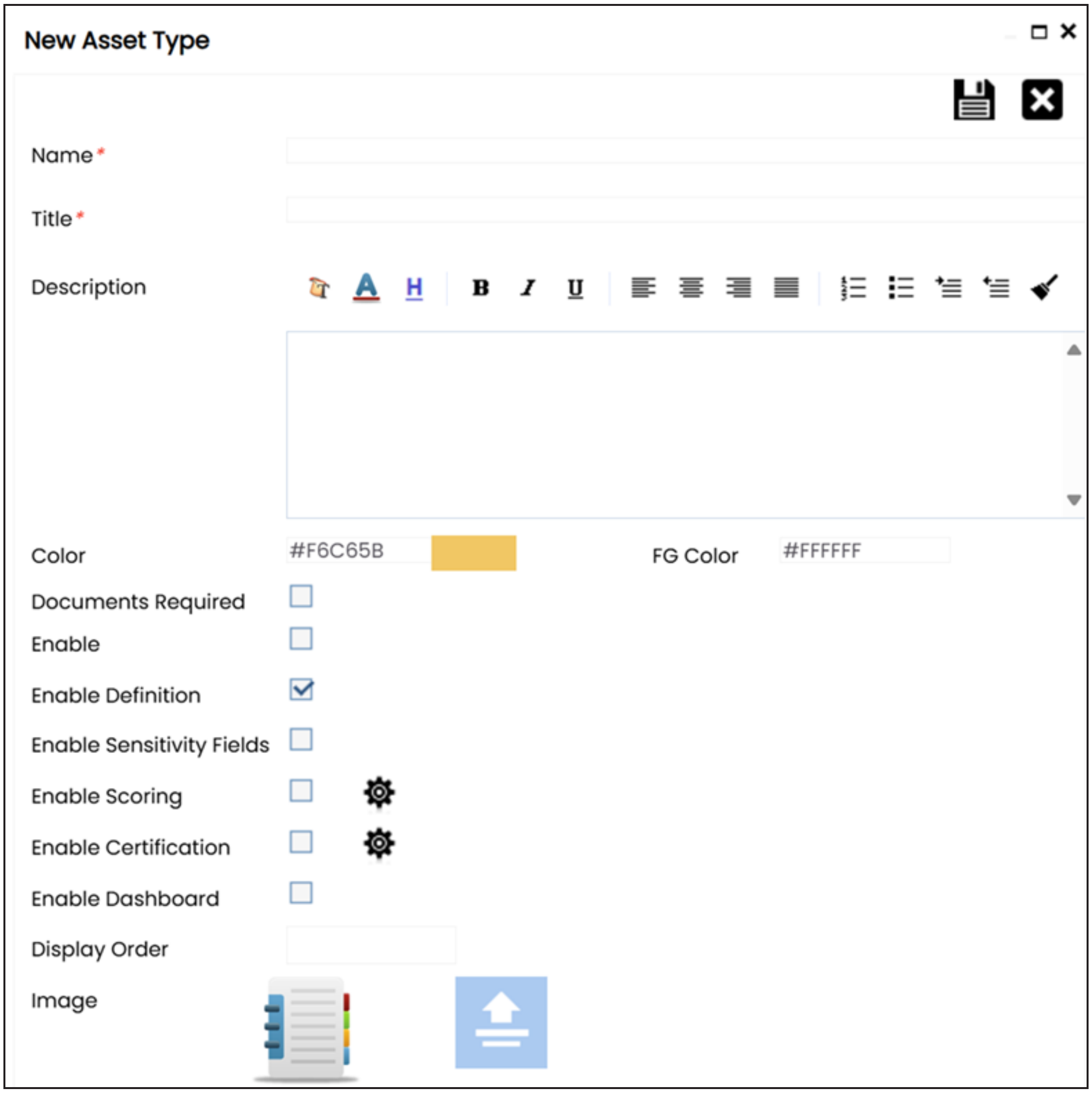
1. Go to **Application Menu** > **Settings** > **Business Glossary Manager & Data Marketplace**.
   The Business Glossary Manager & Data Marketplace Settings page appears.
   By default, it opens the ASSET TYPES settings for Business Assets.



On the Business Assets tab, click  to choose an asset type from the list, and the assets are created in the respective module. For example, based on the screenshot below, new assets will be created and added to Data Marketplace Module.


Data Marketplace
Datasets
Insights
AI Models
ASSET TYPES:
Business Assets
Data Marketplace

The New Asset Type page appears.



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

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

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.

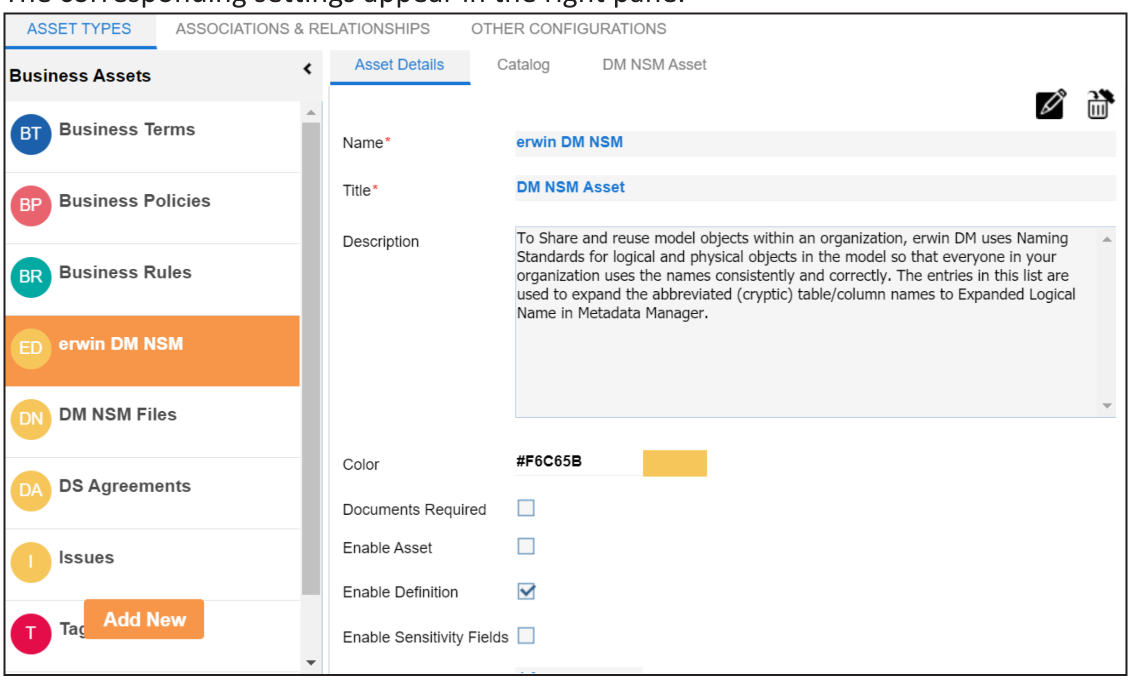
Configuring erwin DM NSM Asset

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.

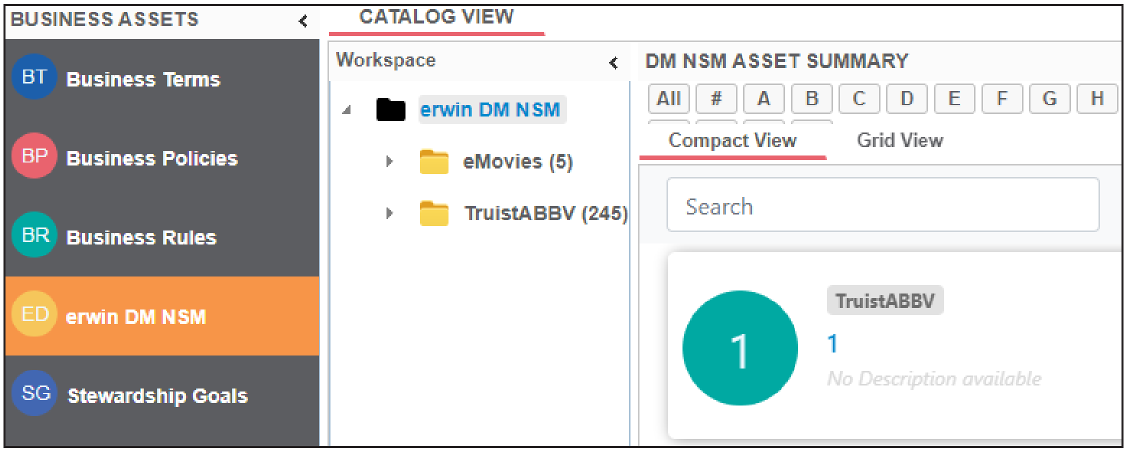
To enable erwin DM NSM asset type, follow these steps:

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



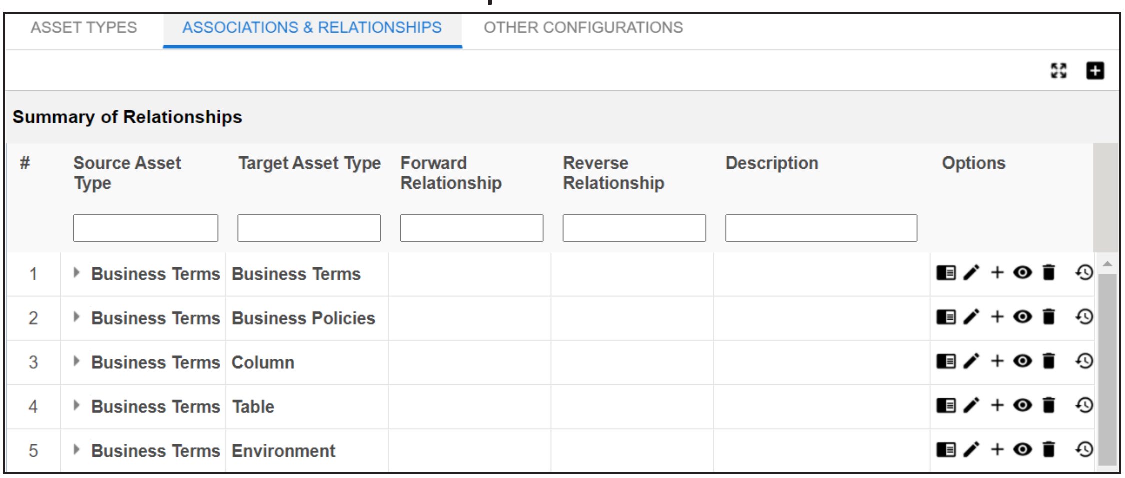
Configuring Associations and Relationships

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.

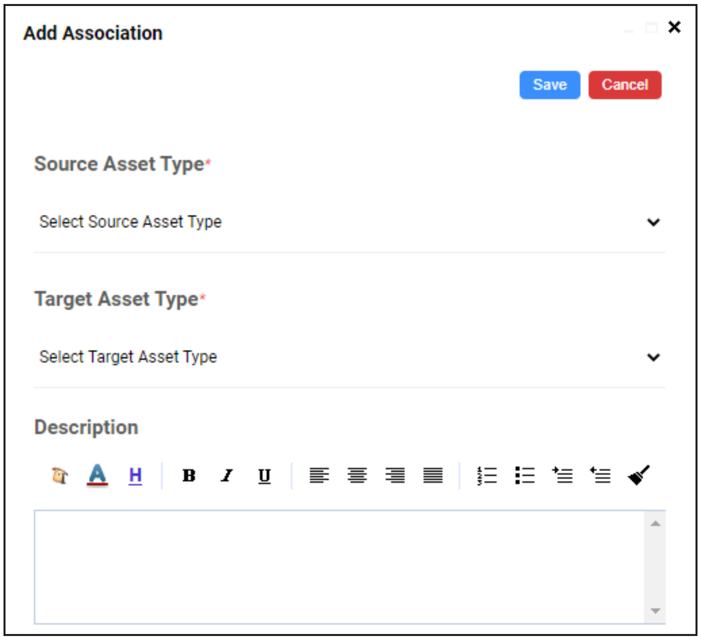
The following steps walks you through adding associations and relationships to business terms. Similarly, you can configure them for marketplace assets.

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.



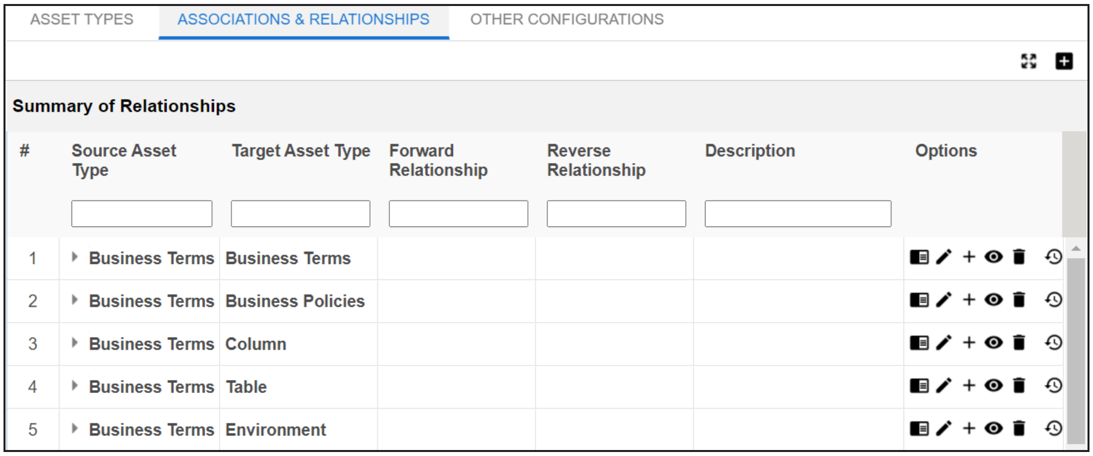
The Add Association page appears.



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.

The association is added to the list 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				

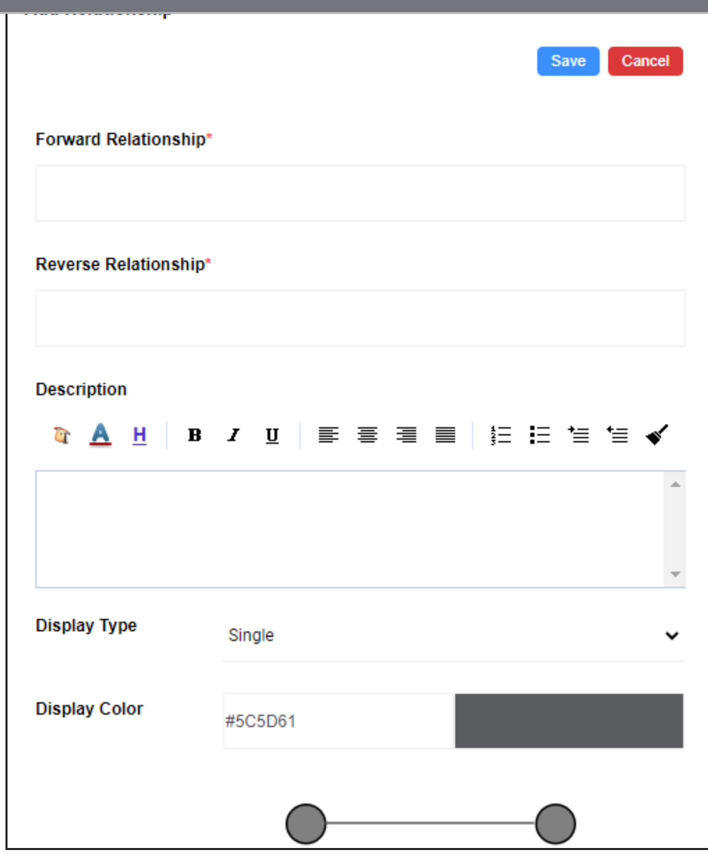
Adding Relationships

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.



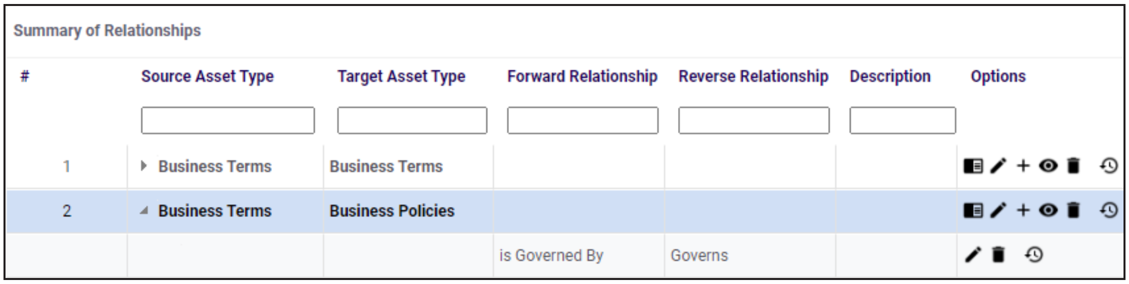
2. Select or enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.
   Refer to the following table for field descriptions.

Field Name	Description
Forward Relationship	Enter a name of the relationship of source asset type with target asset type. For example, *is associated with*.
Reverse Relationship	Enter a name of the relationship of target asset type with the source asset type. For example, *derives from*.

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.

> Data Value Score = (Parameter$_1$ Score × Weightage$_1$) + (Parameter$_2$ Score × Weightage$_2$) + ... + (Parameter$_N$ Score × Weightage$_N$)

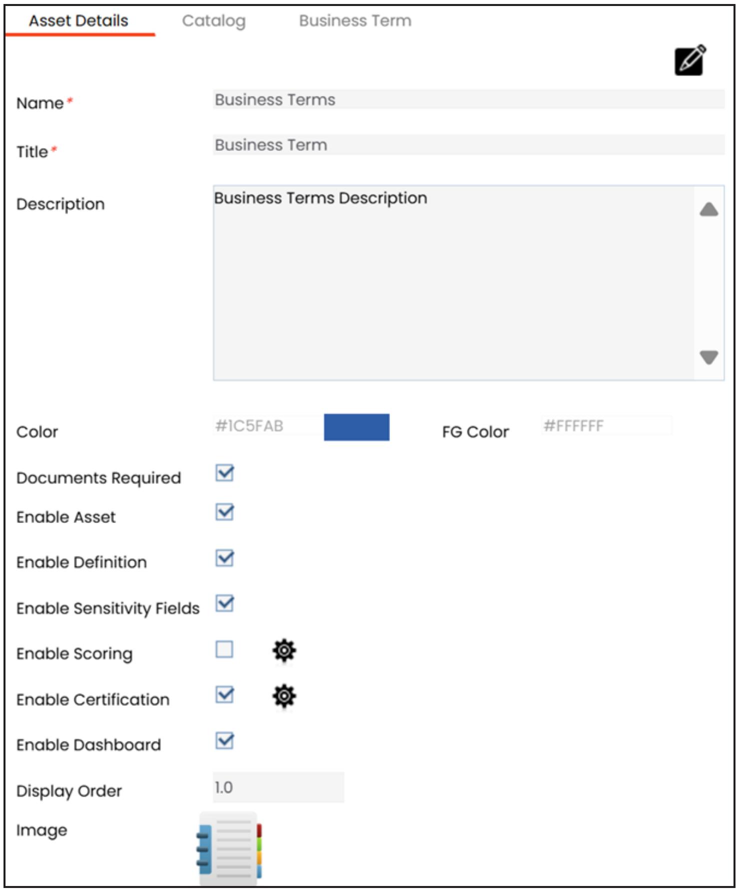
Configuring Data Value Score

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:

1. On the Asset Details tab, click .

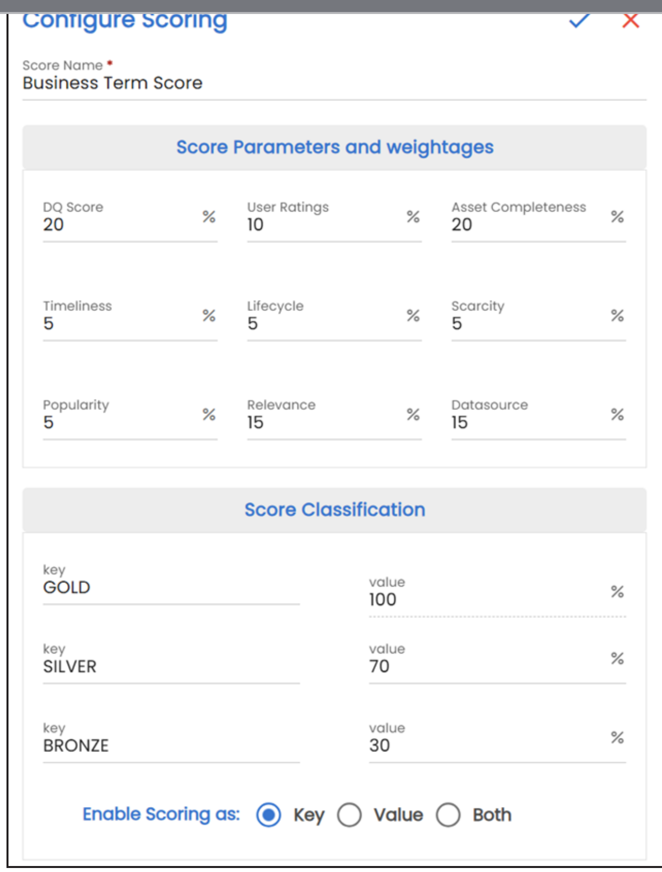


2. Select the **Enable Scoring** check box.

   Scoring is enabled.

3. To configure scoring, click .

   The Configure Scoring pane appears.



4. Enter or select appropriate values in the fields. Fields marked with a red asterisk are mandatory.

   Refer to the following table for field descriptions.

Field Name	Description
Score Name	Specifies the name of the score. For example, Business Term Score.
DQ Score	Specifies the 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.

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%

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

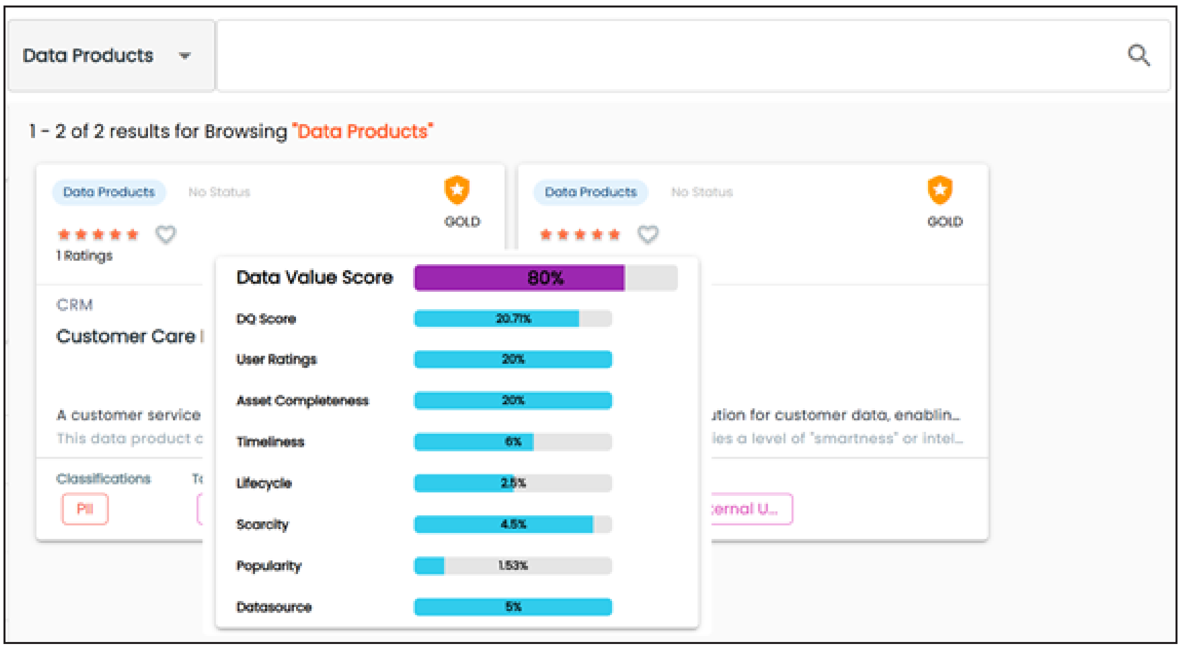
The total weight must equal 100. To exclude a parameter from scoring, set its weight to 0%.

5. Click .
6. Click .

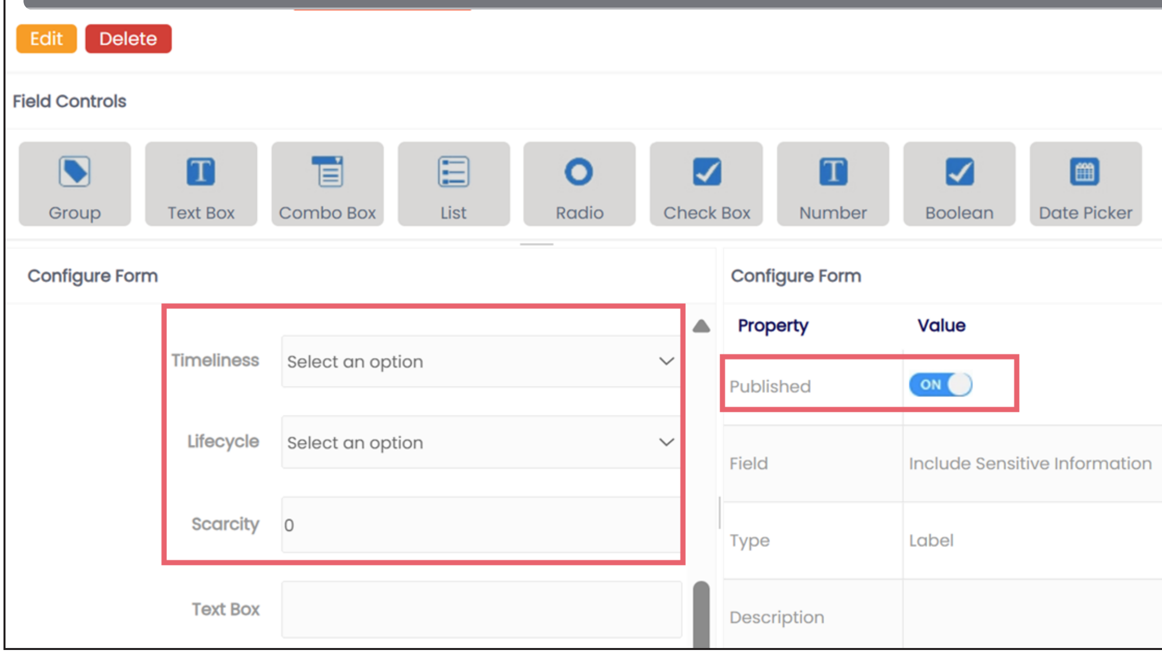
To discard your changes, click .

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.



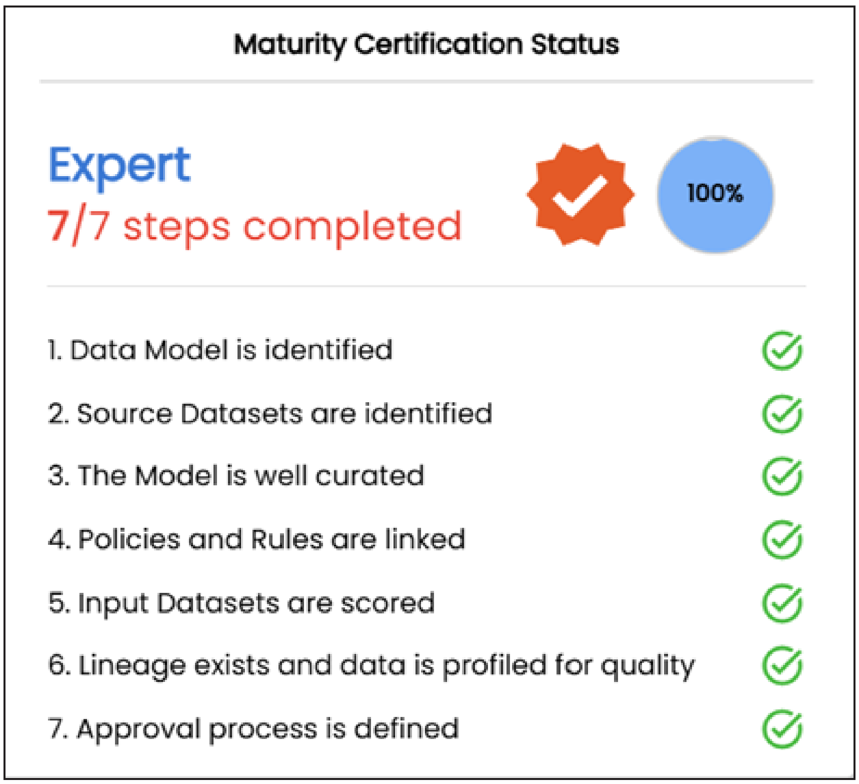
These properties must not be deleted. If they are removed, the Data Value score will not be displayed.

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

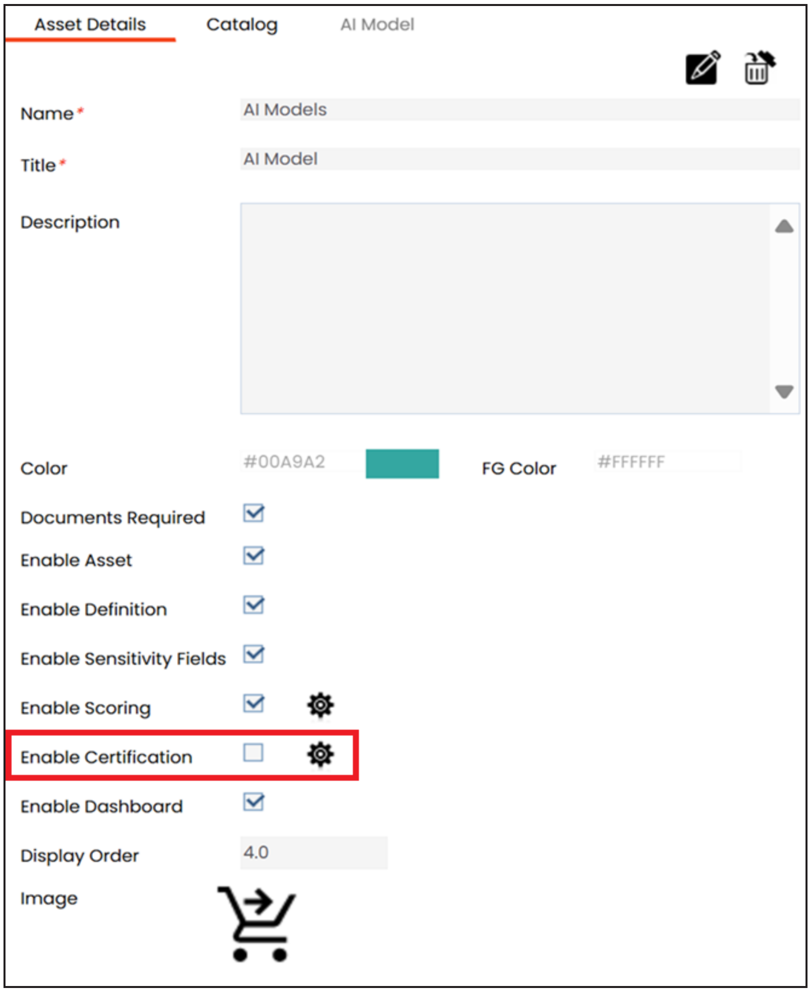
Configuration Maturity Certification

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:

1. On the Asset Details tab, click .

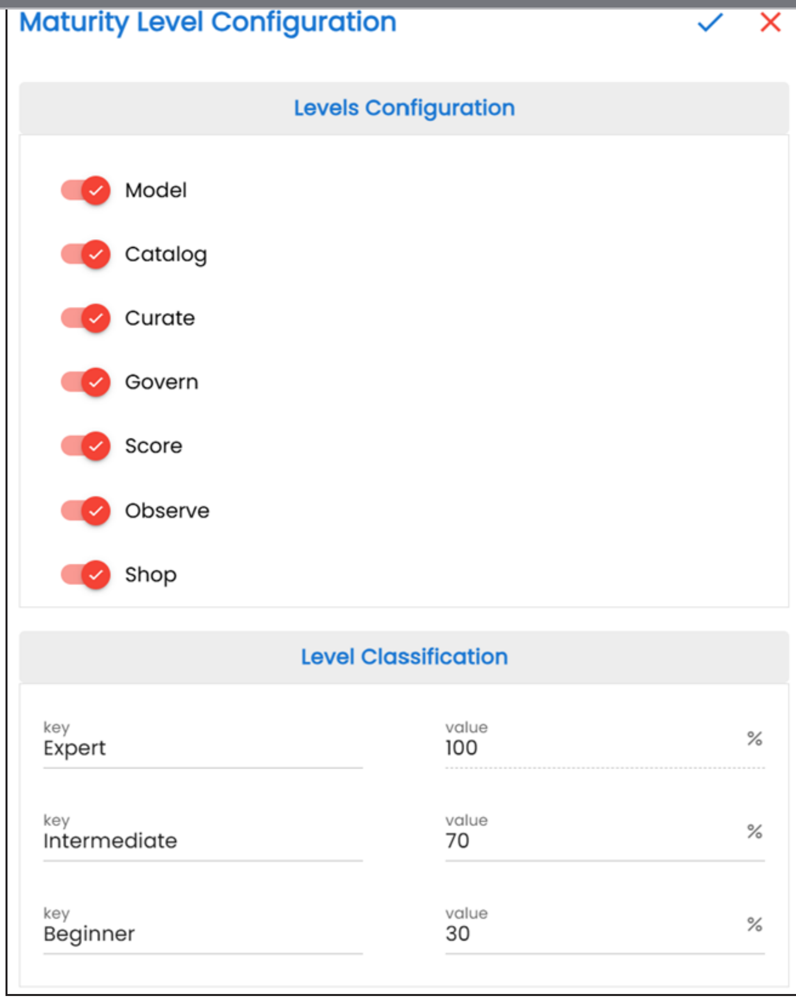


2. Select the **Enable Certification** check box.

   The certification is enabled.

3. To configure certification, click .

   The Maturity Level Configuration pane appears.



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

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

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.

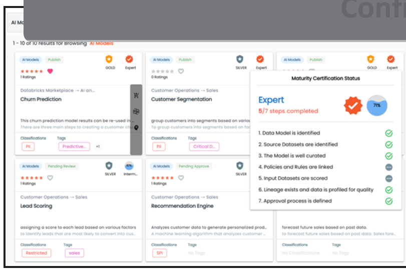
5. Click ✓.
6. Click .

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.

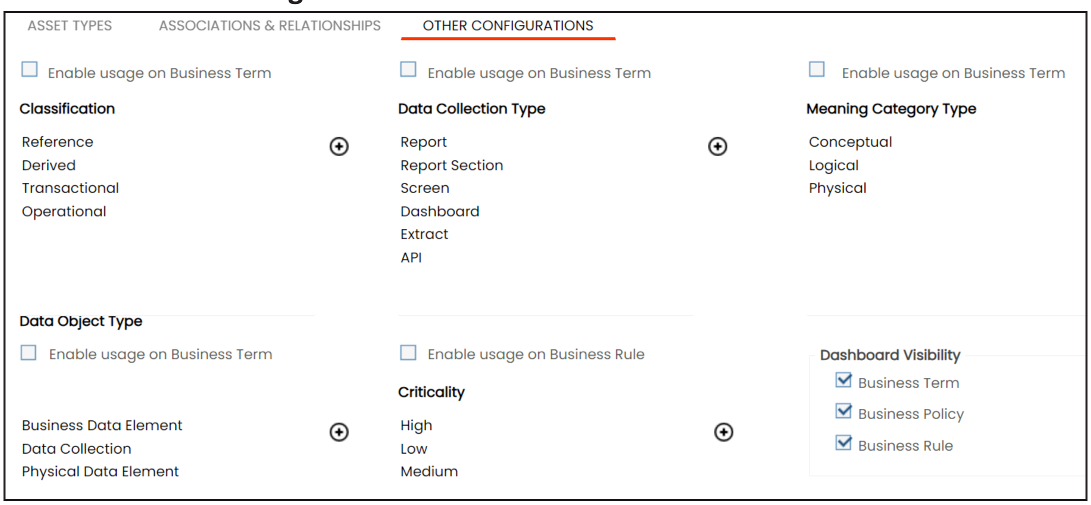


1 - 10 of 10 results for Browsing AI Models
Maturity Certification Status
Expert
5/7 steps completed
71%
1. Data Model is identified
2. Source Datasets are identified
3. The Model is well curated
4. Policies and Rules are linked
5. Input Datasets are scored
6. Lineage exists and data is profiled for quality
7. Approval process is defined
Churn Prediction
Customer Segmentation
Lead Scoring
Recommendation Engine

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:

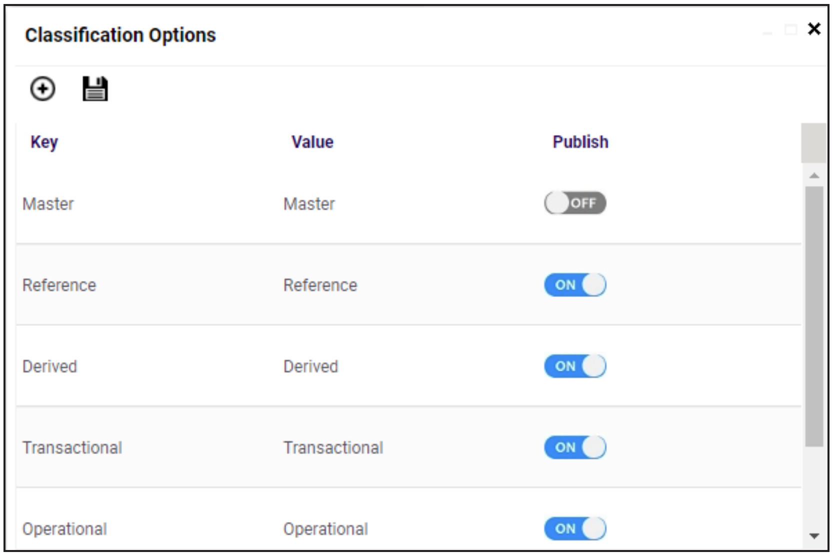
1. Go to **Application Menu** > **Settings** > **Business Glossary Manager & Data Marketplace**.
   The Business Glossary Manager & Data Marketplace Settings page appears. By default, it opens the Asset Types settings.
2. Go to the **Other Configurations** tab.
   

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.



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.

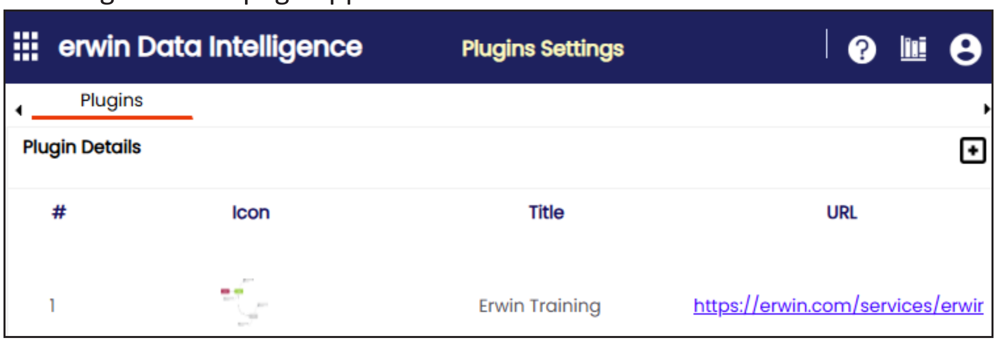
Configuring Plugins

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:

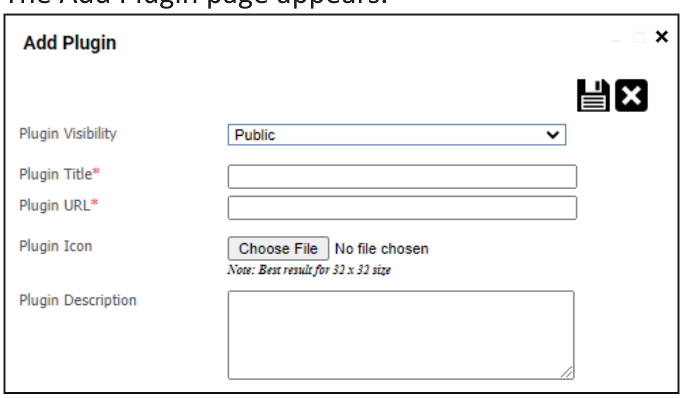
1. Go to **Application Menu** > **Settings** > **Plugins**.

   The Plugin Details page appears.

2. To add plugins, click .

   The Add Plugin page appears.

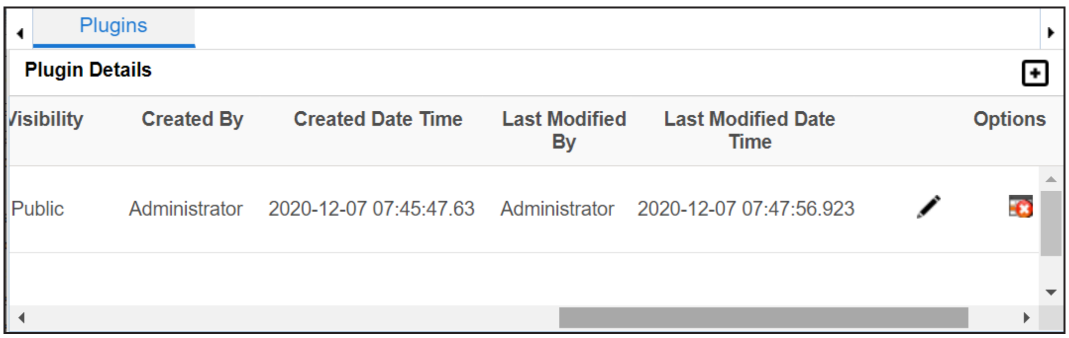
3. Enter appropriate values to the fields. Fields marked with red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Plugin Visibility	Select appropriate plugin visibility.

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.



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:

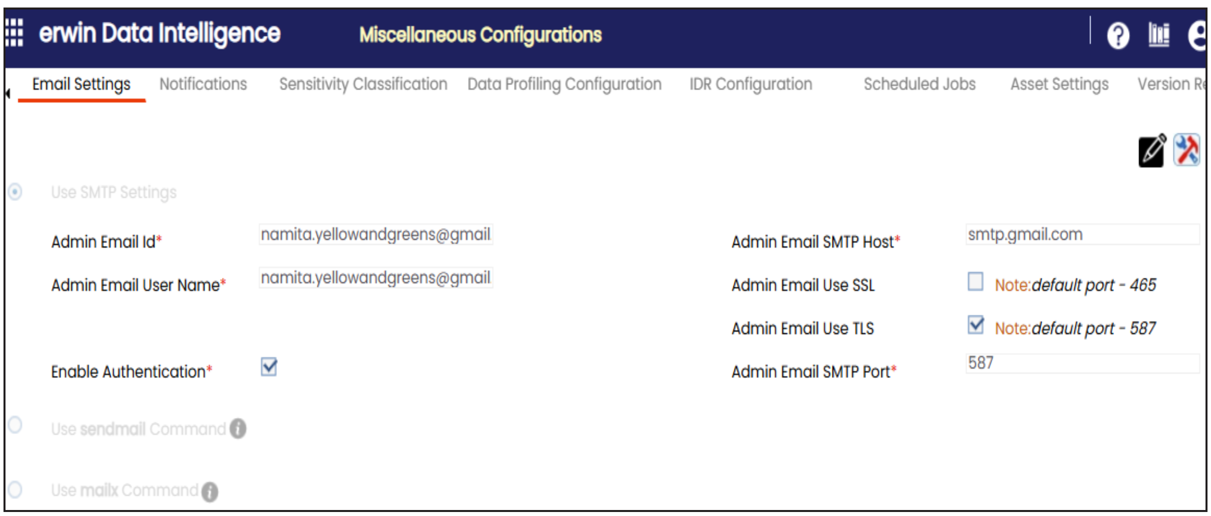
- Email Settings: Under this, you can configure outbound email notifications to users. You can use SMTP server or configure different commands in the Linux environment to send outbound emails.
- Notification: Under this, you can configure email notifications to users when Sensitive Data Indicator (SDI) 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.

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:



Configuring Email Settings

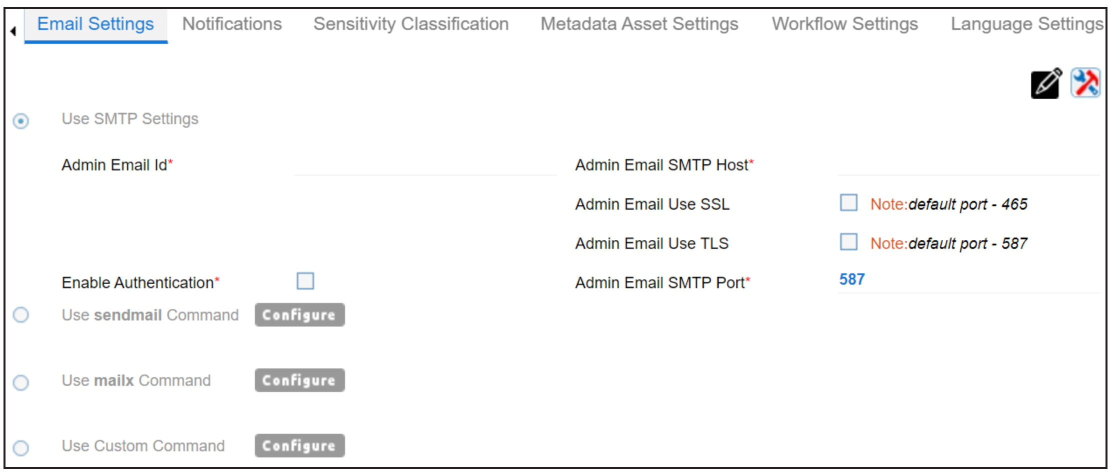
You can configure Admin Email Id to send notifications to the users of erwin Data Intelligence (erwin DI). It involves using:

- 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.

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 outbound emails.

   To configure the SMTP Settings, follow these steps:

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.

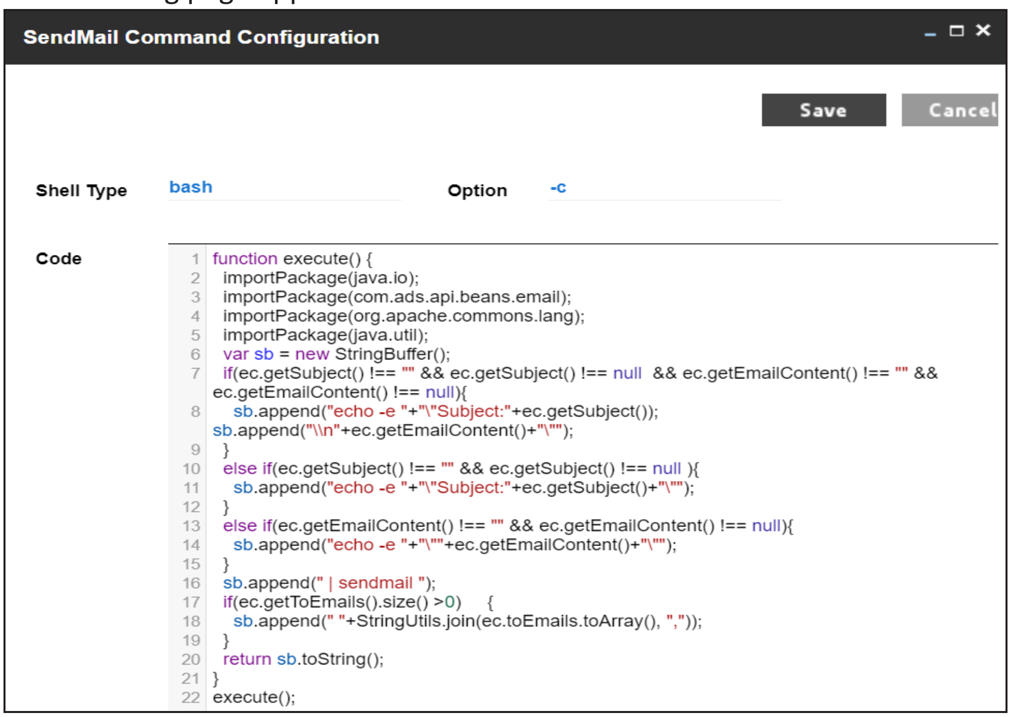
Use sendmail Command

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.

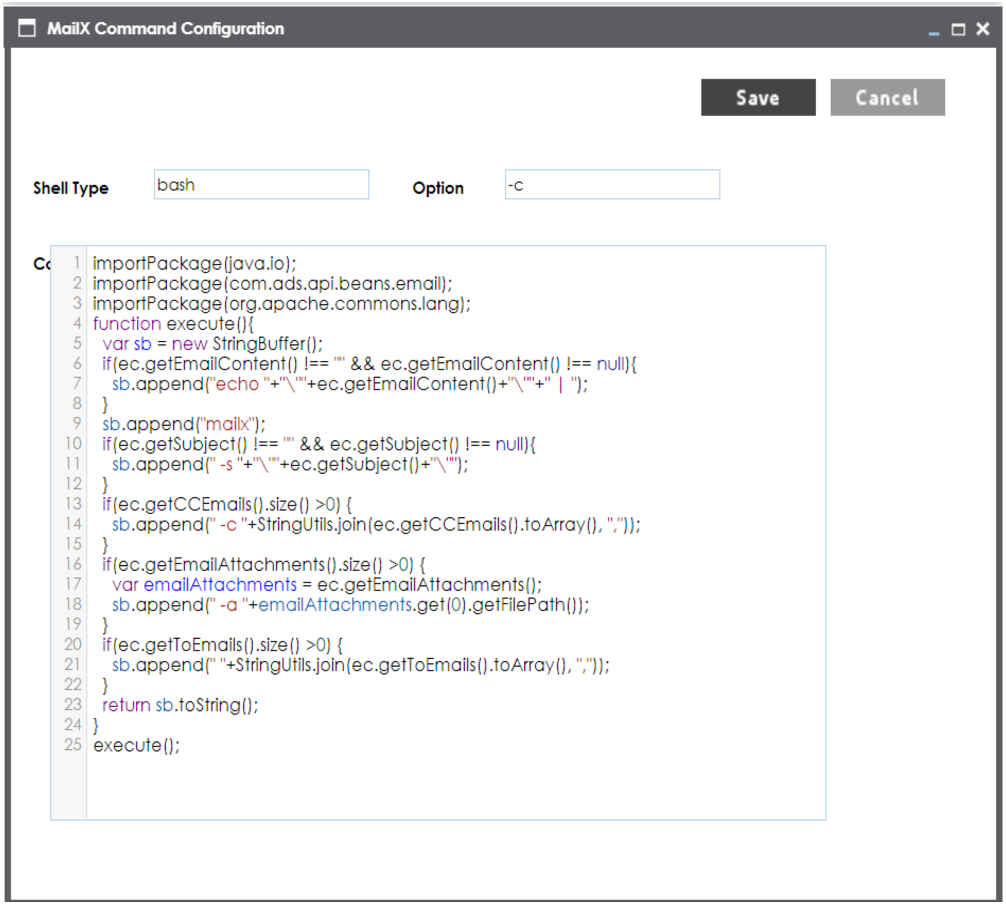
Use mailx Command

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.



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

   The mailx command is configured.

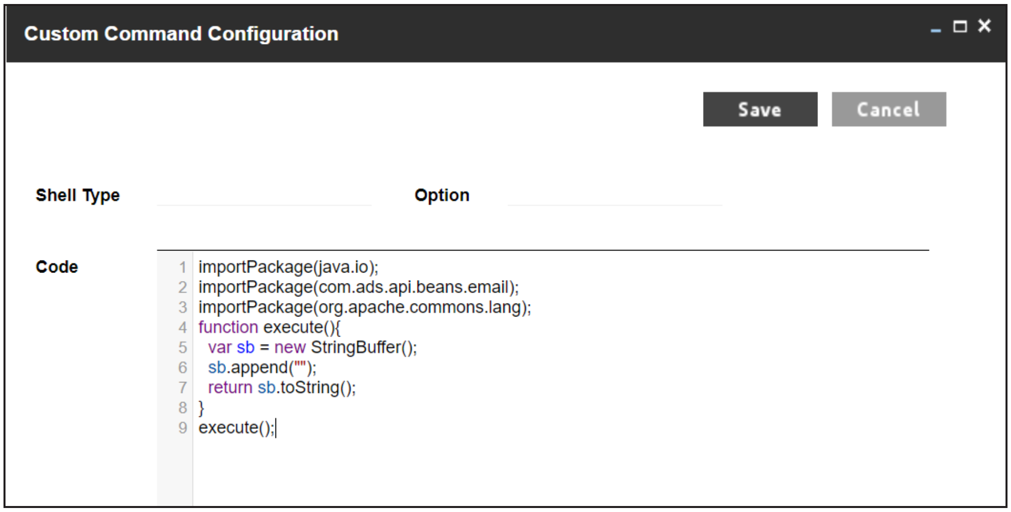
Use Custom Command

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.

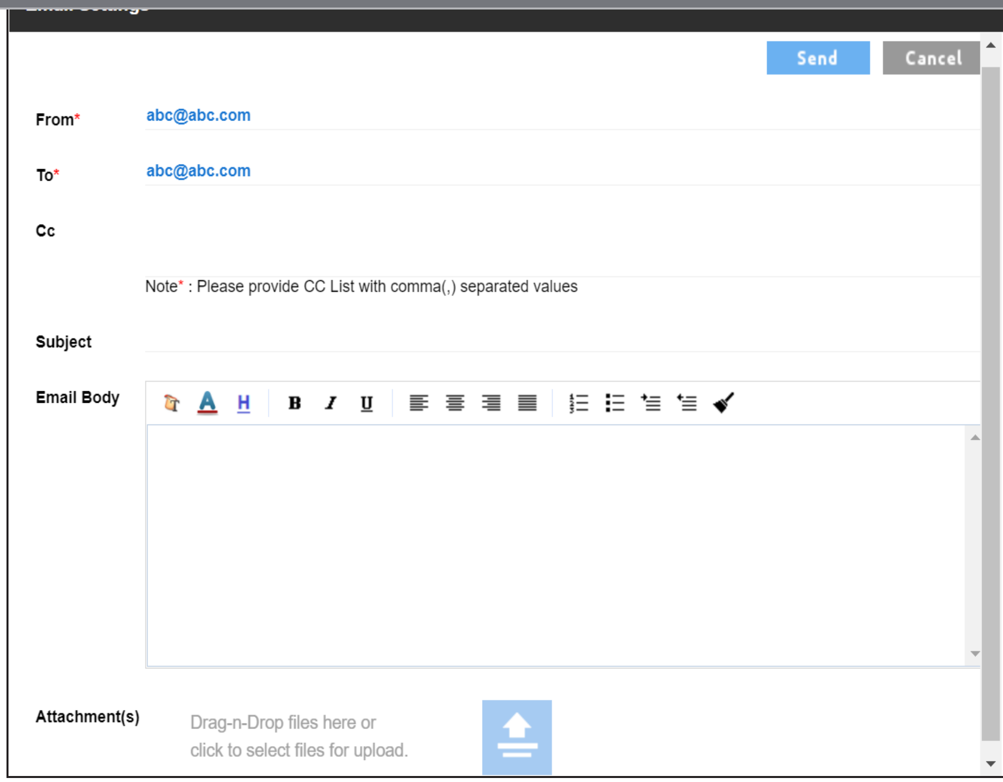


3. Configure the custom command.
4. Click **Save**.

   The custom command is configured.

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

   The Email Settings page appears.



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

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

The success message validates your email settings.

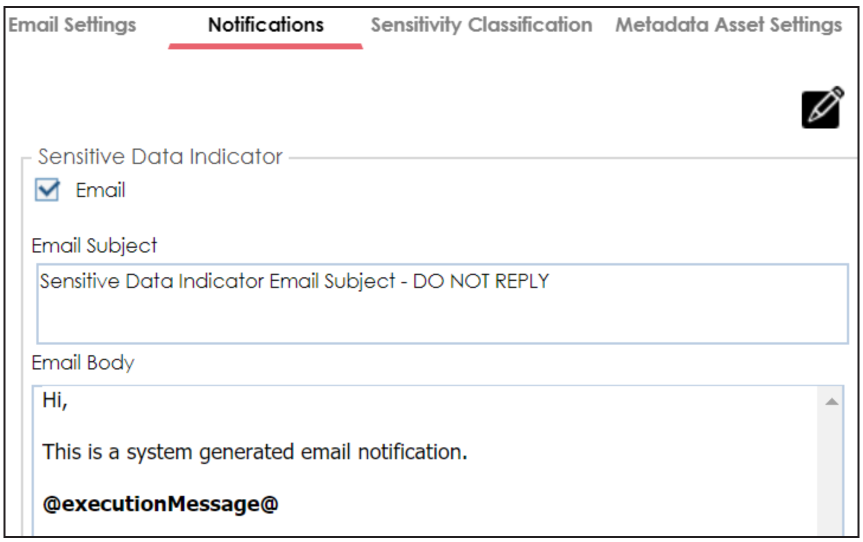
Configuring Sensitivity Update Notifications

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.

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.

Click .

The sensitivity update notifications are configured.

Configuring Sensitivity Classifications

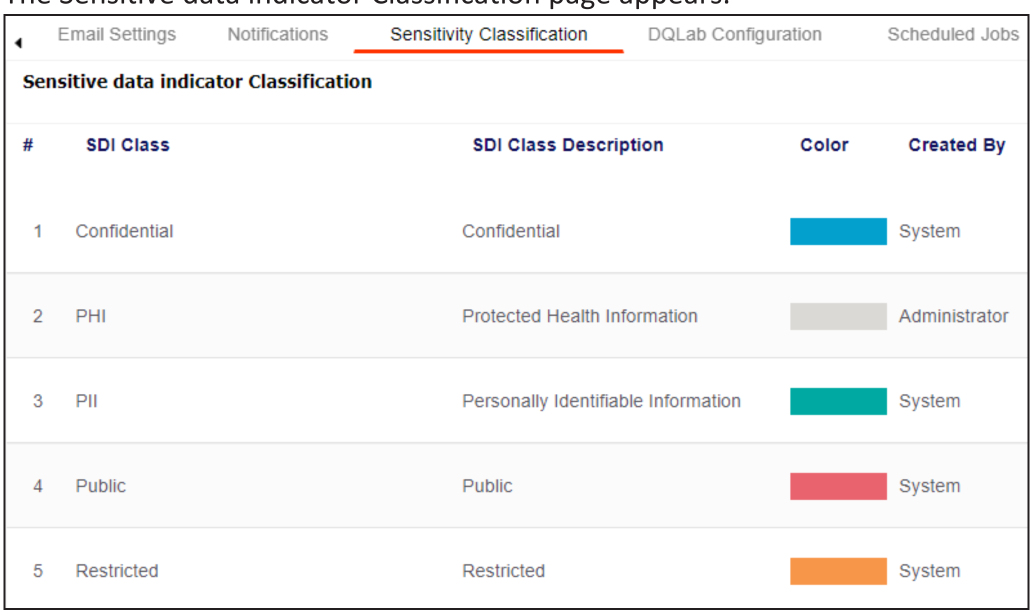
You can configure sensitive data indicator (SDI) classifications to classify sensitivity of:

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

To configure sensitive data indicator classifications, follow these steps:

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

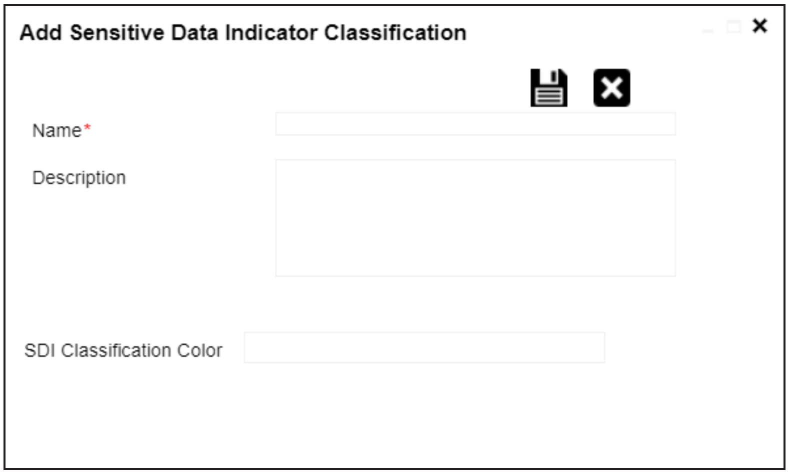
   The Sensitive data indicator Classification page appears.



#	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

2. Click .

   The Add Sensitive Data Indicator Classification page appears.



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.

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

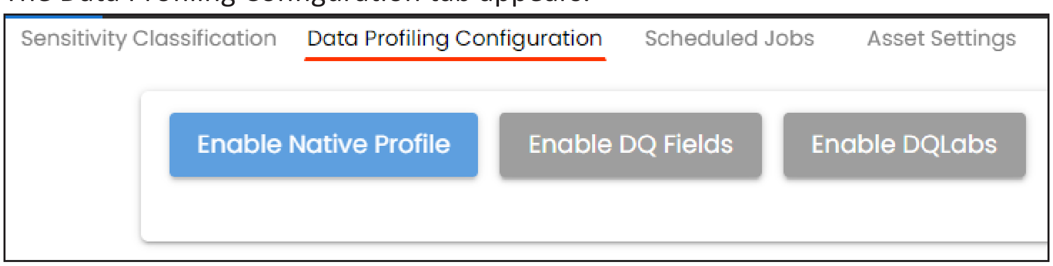
Data quality scores (DQ scores) enable you to measure your data's quality. A higher DQ score indicates better accuracy and completeness of the data. To provide data quality capabilities, erwin Data Intelligence (erwin DI) integrates erwin Data Quality as a data quality analysis partner. To run data quality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

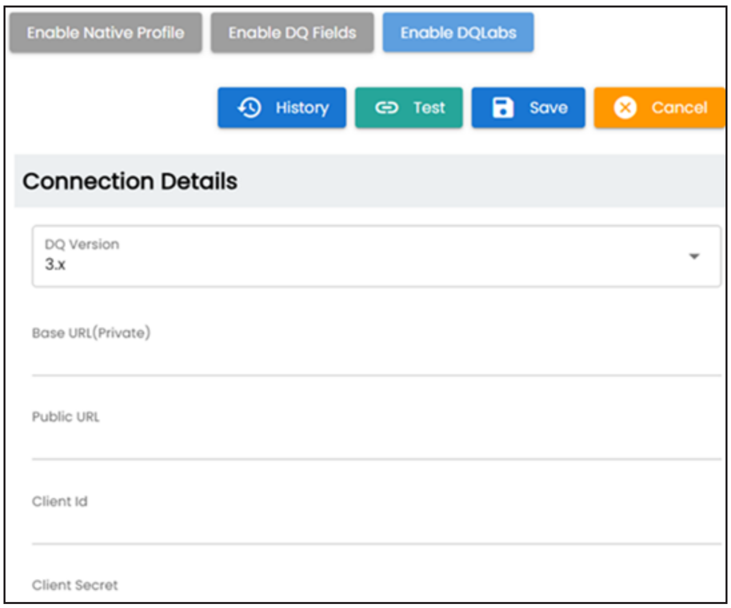
   - **Enable Native Profile**: Use this option to enable and configure an erwin Data Quality profile to sync erwin DI and erwin Data Quality and profile data.
   - **Enable DQ Fields**: Use this option to display only the selected data quality parameters across the assets in your organization.
   - **Enable 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.

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

4. Click Save.
   The erwin Data Quality configuration is saved.

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

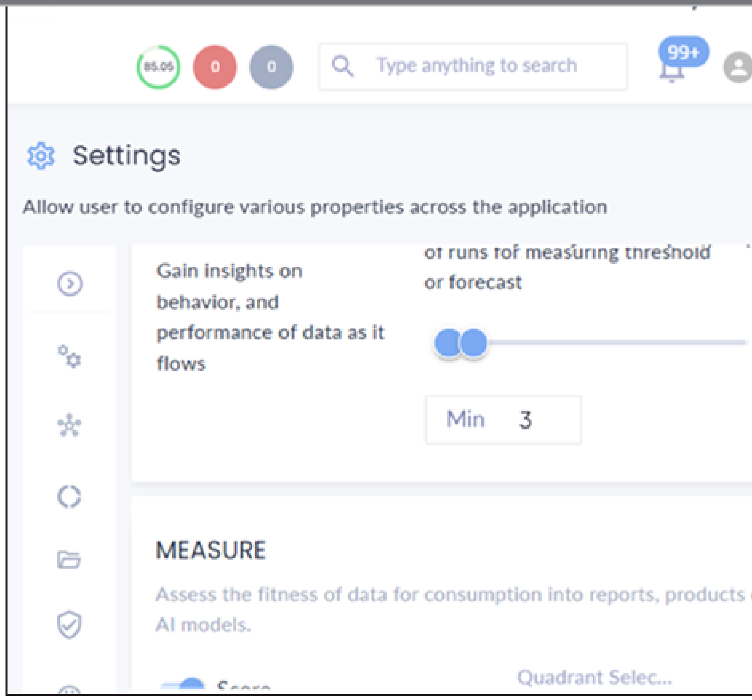
You can now access erwin Data Quality from erwin DI. To access erwin Data Quality, go to **Application Menu** > **Data Quality**.

The next steps involve adding datasets and views in the erwin Data Quality and scheduling a erwin Data Quality job.

Accessing erwin Data Quality Configuration Details

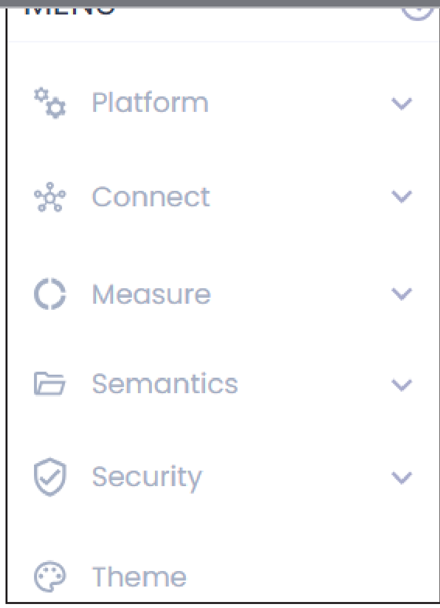
To access Client ID and Client Key in your erwin Data Quality instance, follow these steps:

1. Log in to erwin Data Quality.
   The erwin Data Quality instance opens.
2. On the app menu, click > **Settings**.
   The Settings page appears.

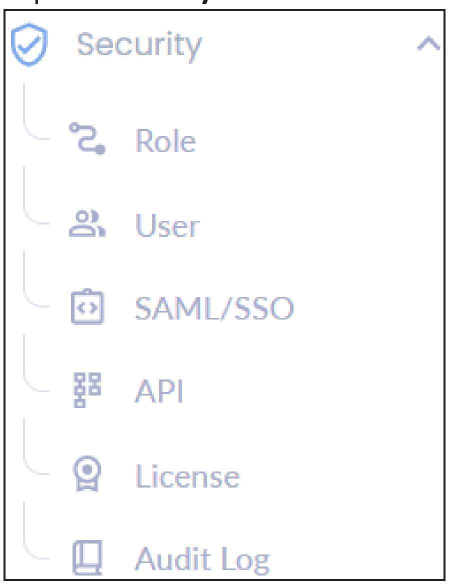


3. Click  to expand menu.

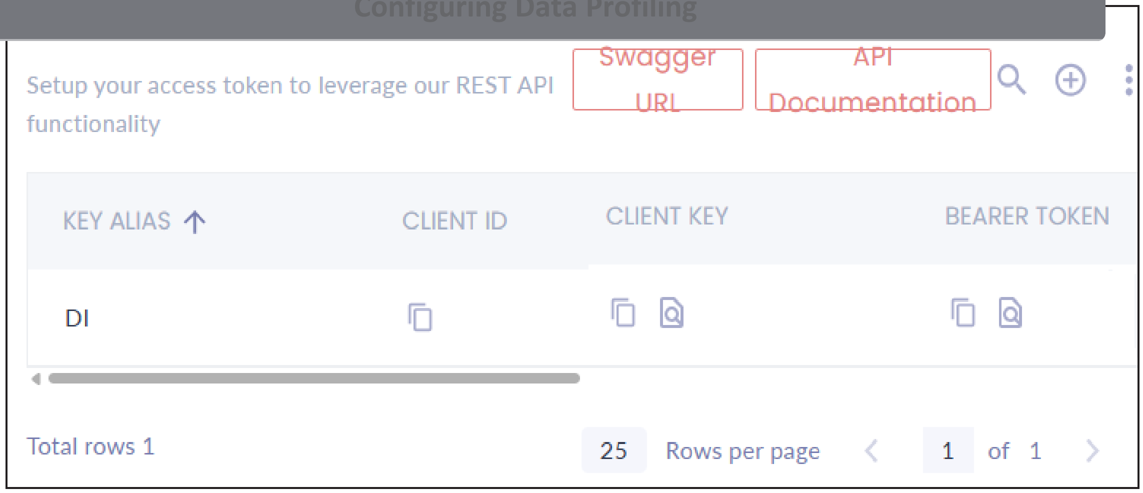
   The menu expands and displays additional options.



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.

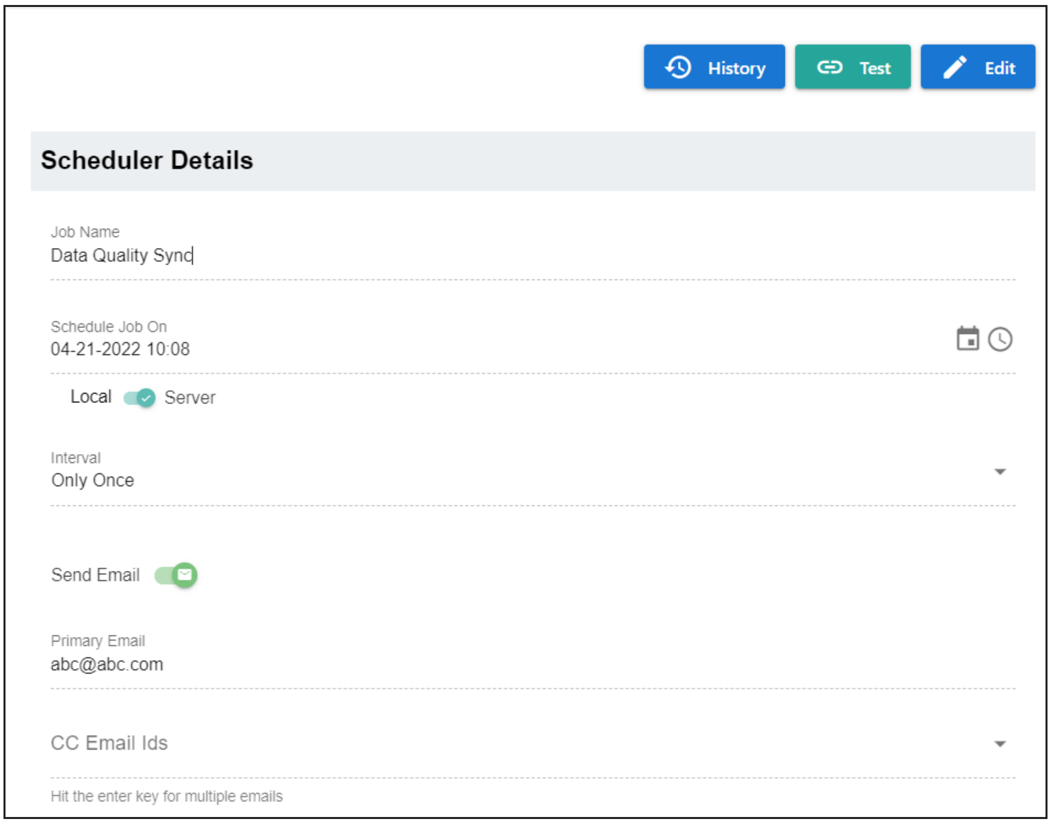
A new API key is created, and the Client ID and Client Key are generated.

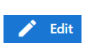
Scheduling erwin Data Quality Jobs

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.



2. Click 

.
   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.

include details of the jobs run by all users.

Activity Log

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

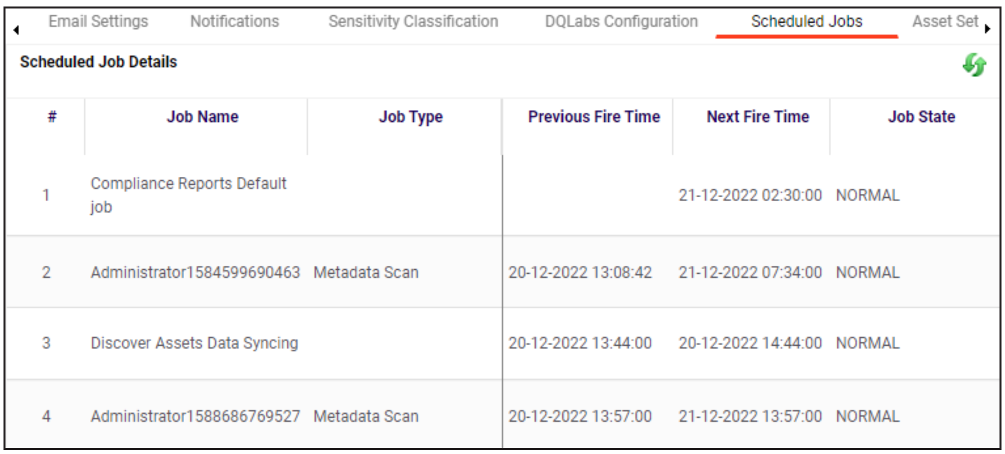
Configuring Scheduled Jobs

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.

2. Click .

   The scheduled job is deleted.

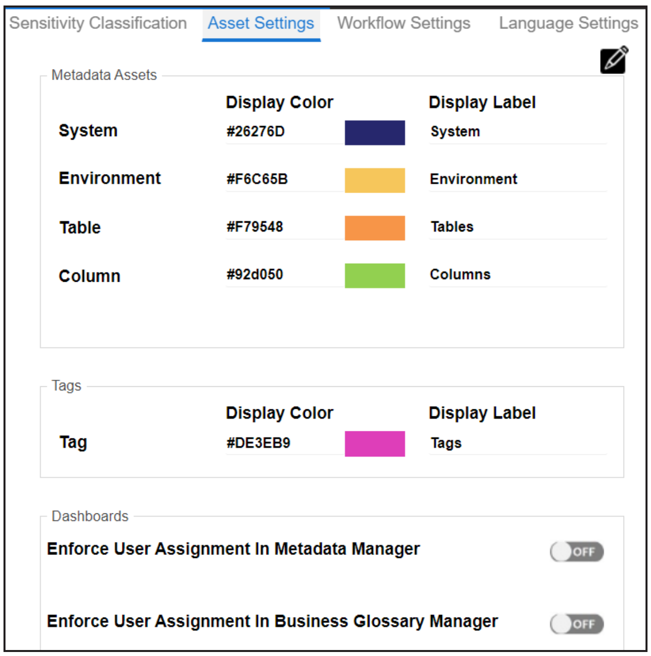
Configuring Asset Settings

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:

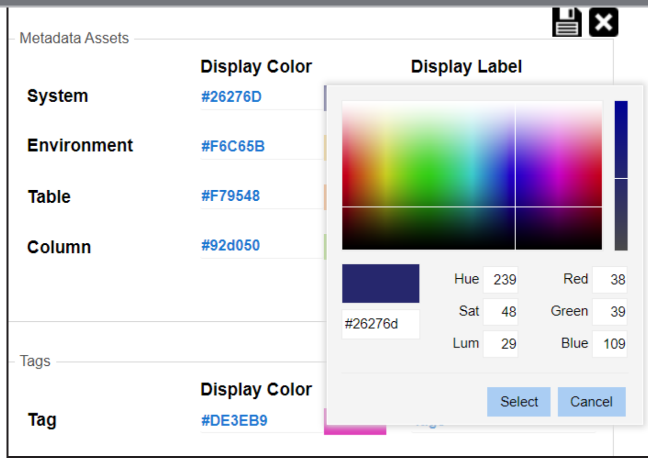
1. Go to **Application Menu** > **Settings** > **Miscellaneous Configurations** > **Asset Settings**.

   The following page appears.

2. Click .

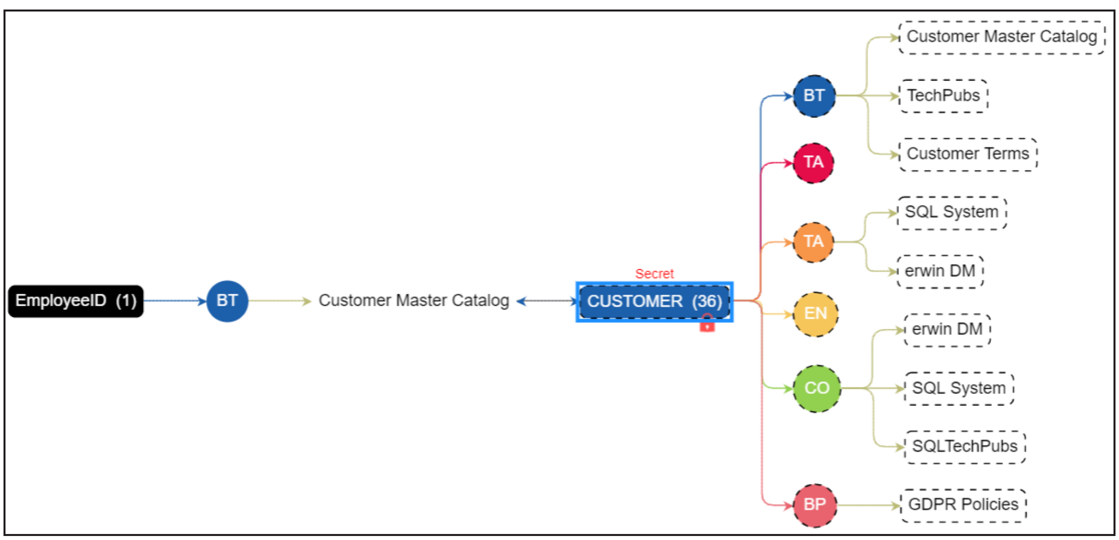
3. Under the Metadata Assets and Tags section, click the required display color box. Then select a color on the color card and click **Select**.



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:

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

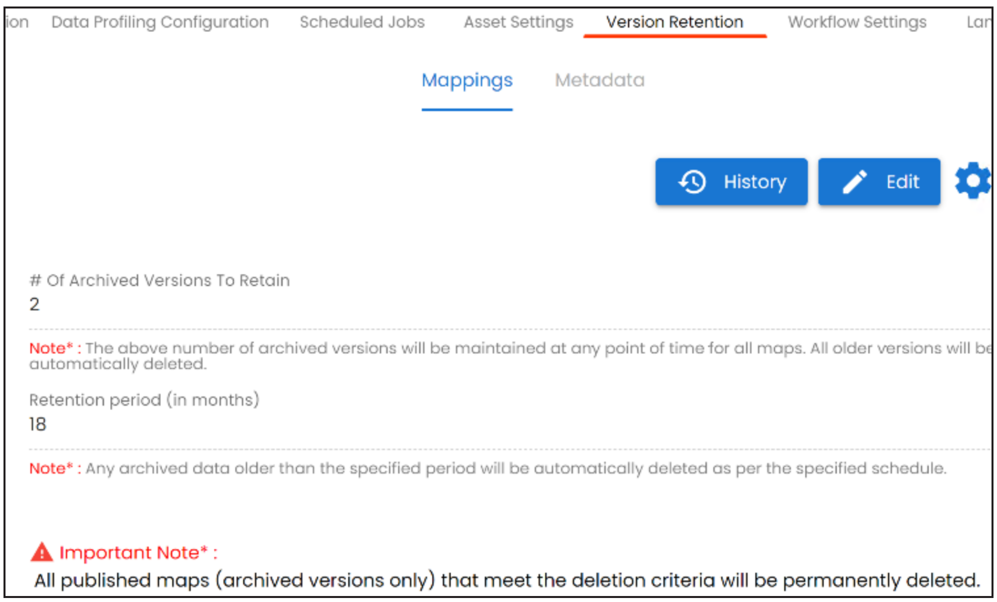
You can now configure the number of archived versions to retain and the retention period (in months) for mappings and environments. Also, you can view the activity logs related to archived versions.

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:

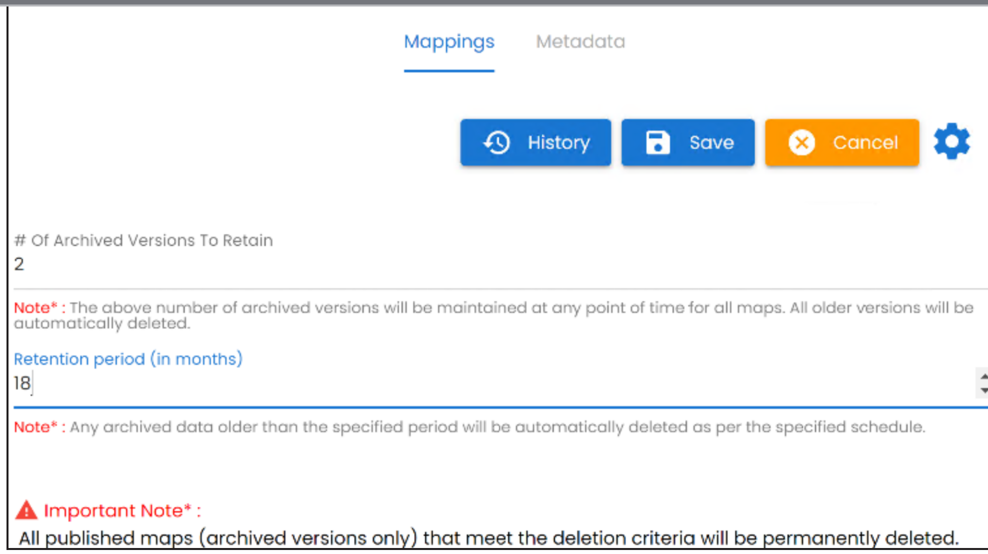
1. Go to **Application Menu** > **Settings** > **Miscellaneous Configurations** > **Version Retention**.

   The following page appears.

2. Under Mappings, click .

   The page switches to edit mode.



3. 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.

4. 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

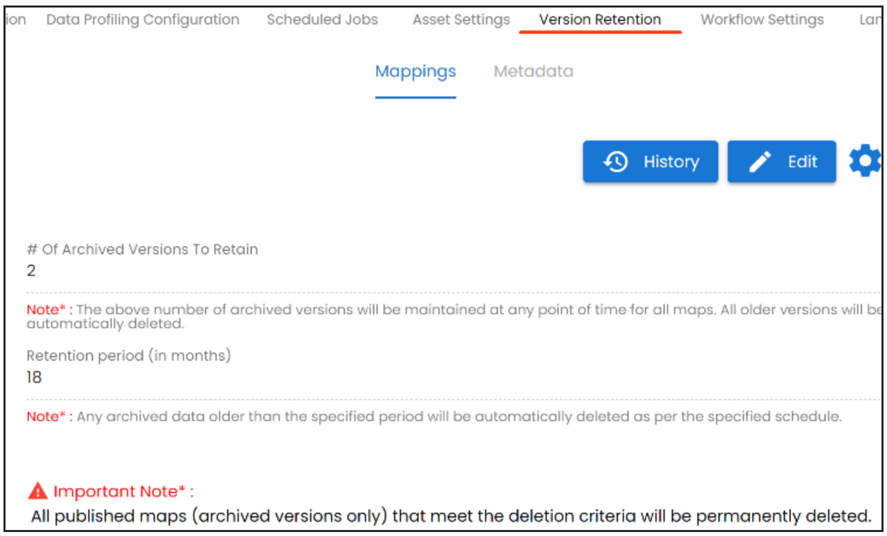
You can now schedule a job to clean up archived mappings and environments.

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:

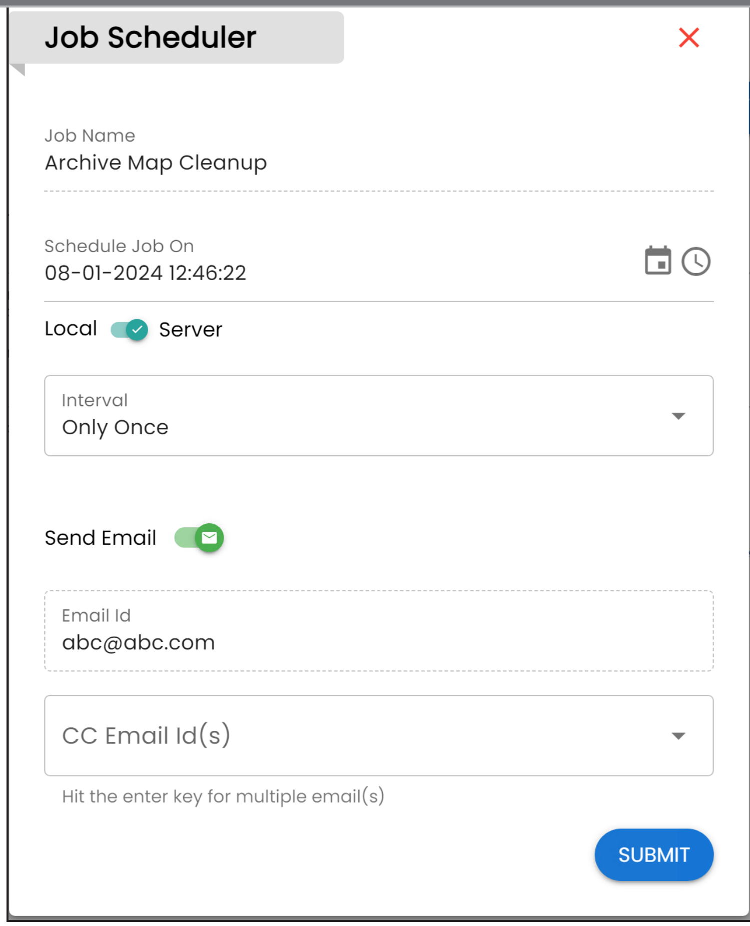
1. Go to **Application Menu** > **Settings** > **Miscellaneous Configurations** > **Version Retention**.

   The following page appears.

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

   The following page appears.



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.

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.

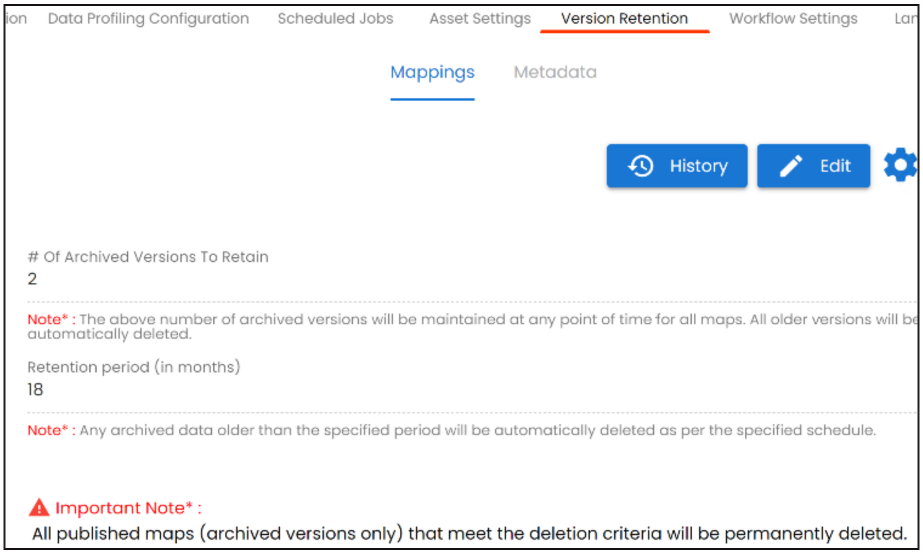
Setting History Retention Period (in months)

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.



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

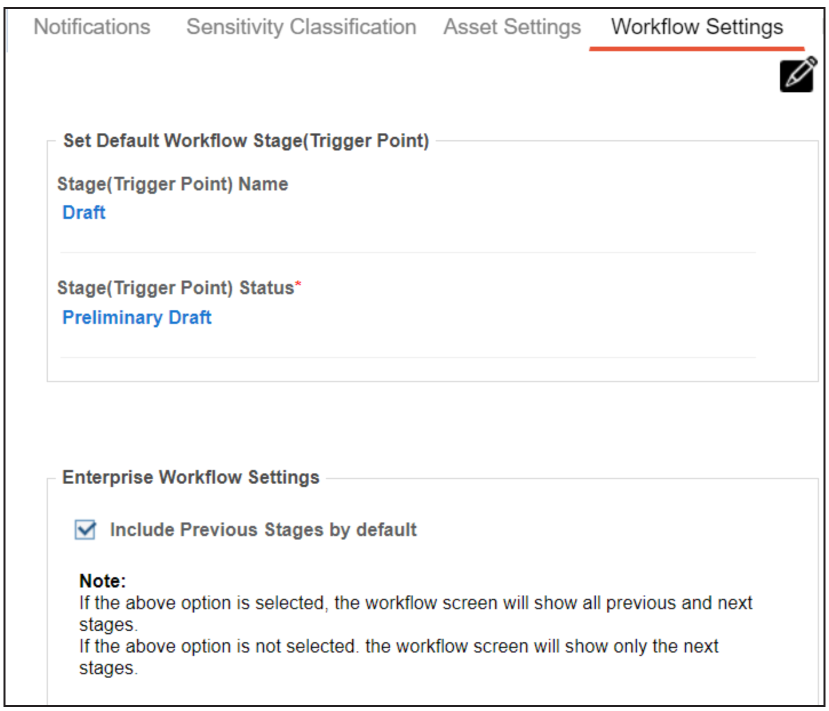
You can configure the following on the Workflow Settings tab:

- **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:

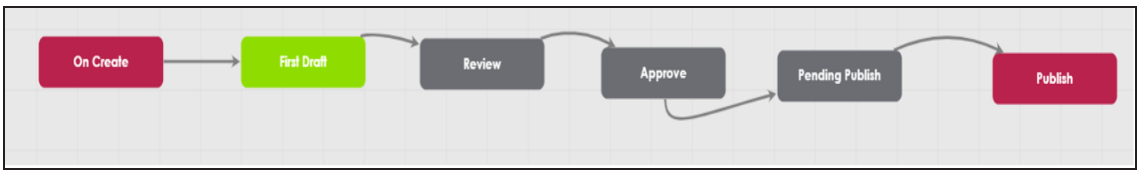
   Set Default Workflow Stage(Trigger Point)

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:

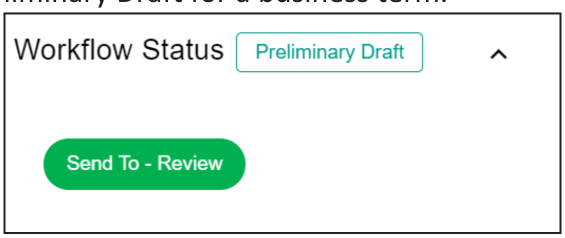
Stage(Trigger Point) Name

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.



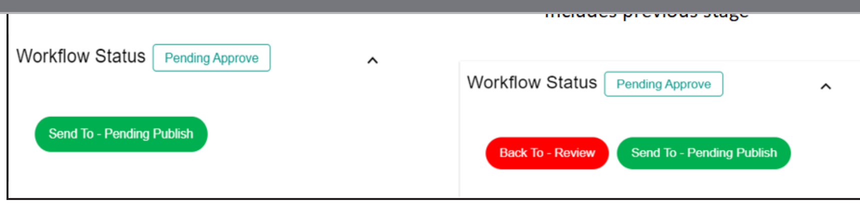
Stage(Trigger Point) Status

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.



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

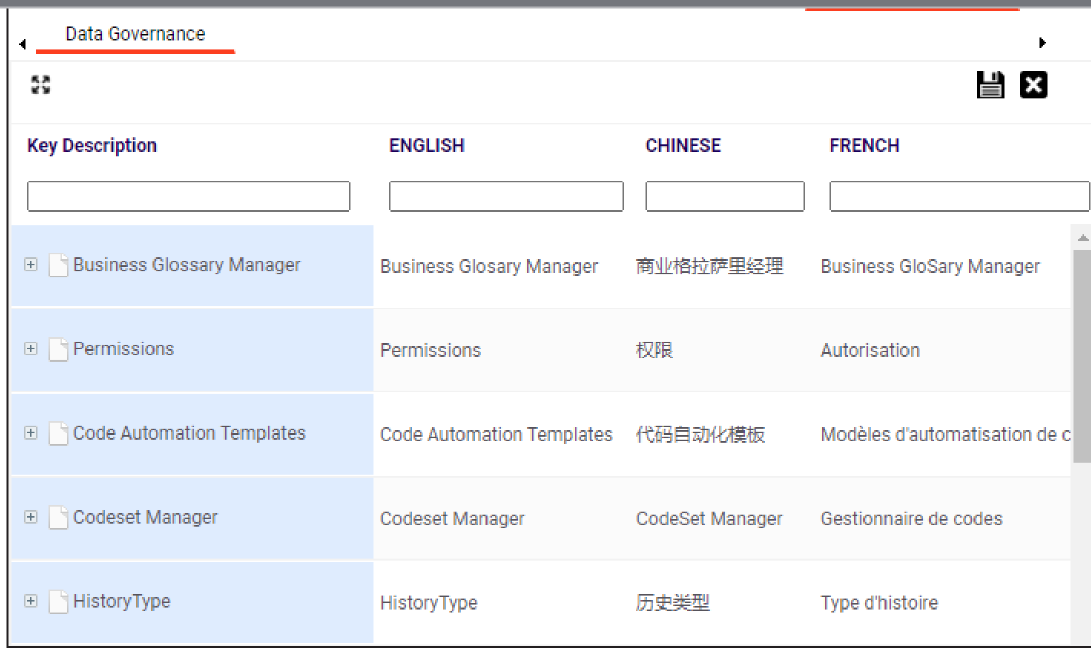
To use the application in any of these languages, configure user-based language preference in the Resource Manager. For more information, refer to the Creating Users and Assigning Roles topic.

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.

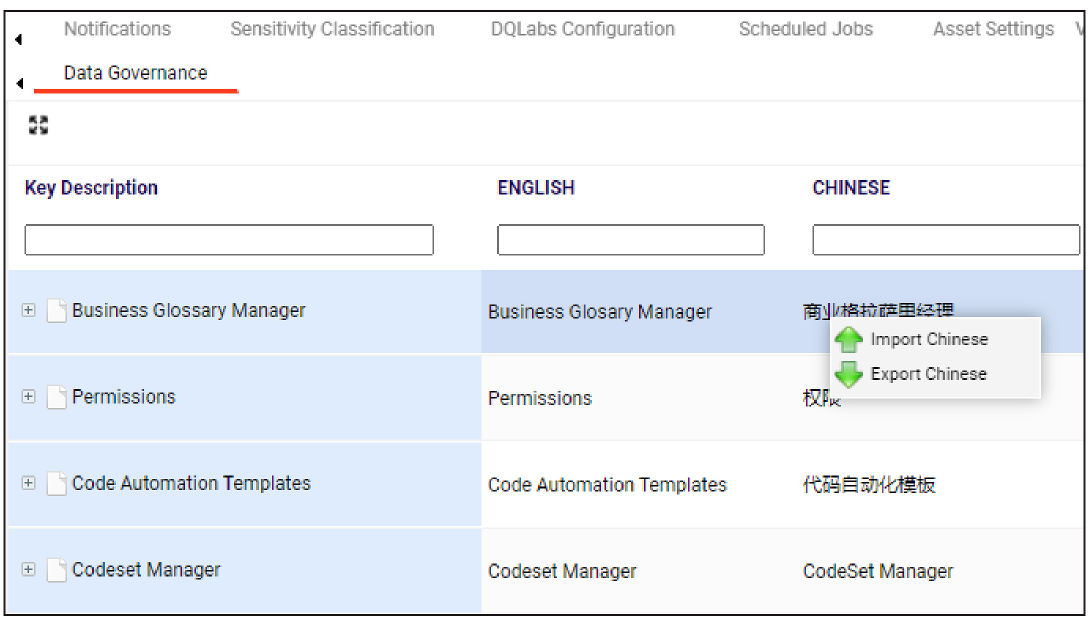
To configure language settings for UI labels, follow these steps:

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

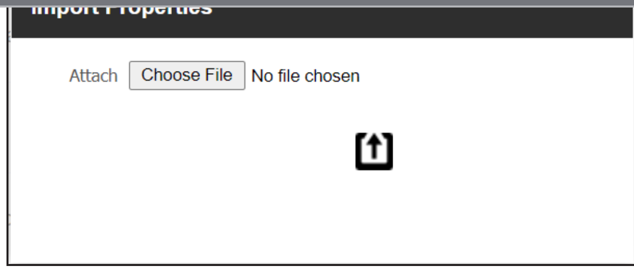
   The following page appears. The keys are organized in a tree structure in the Key Description pane to help identify the location of the UI label in the application. By default, English UI labels are provided in the English column.



2. 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.



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.

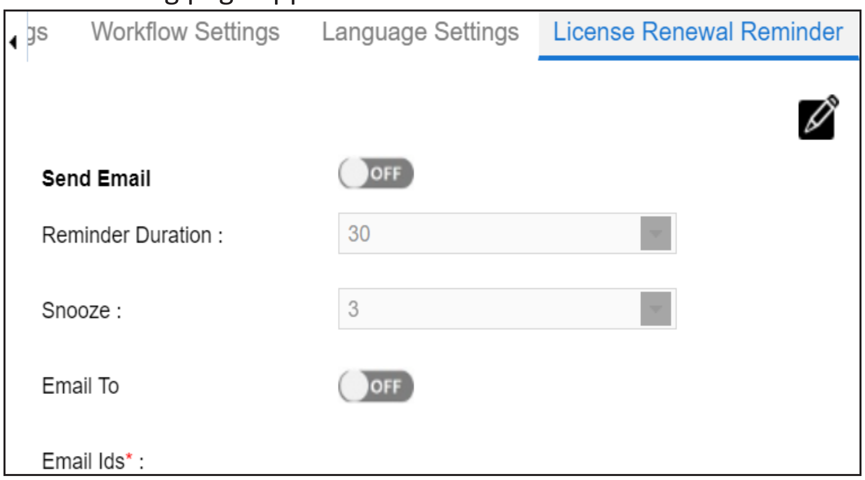
Configuring License Renewal Reminders

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

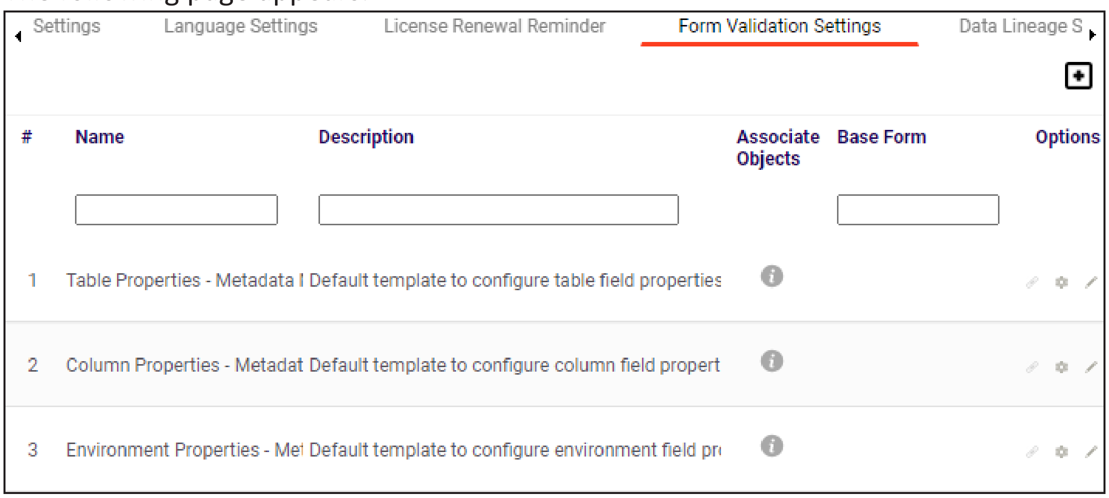
You can create and configure three different form types of the Metadata Manager:

- **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:

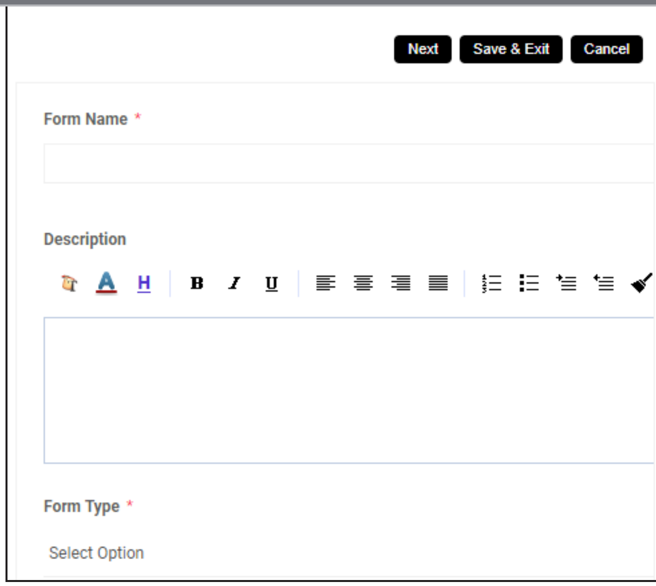
1. Go to **Application Menu** > **Settings** > **Miscellaneous Configurations** > **Form Validation Settings**.

   The following page appears.

2. Click .

   The Add Form page appears.



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

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

4. Click **Save & Exit**.

   The form is created and saved in the form list.

Once a form is created, you can:

- Configure form fields
- Associate the form with systems and environments

Configuring Form Fields

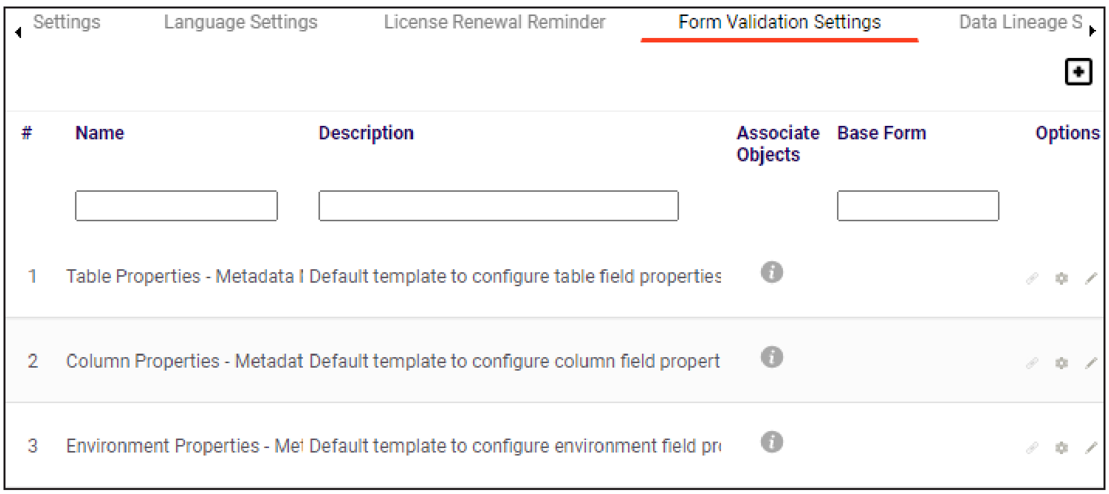
You can configure form fields and change its properties by:

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

To configure form fields, follow these steps:

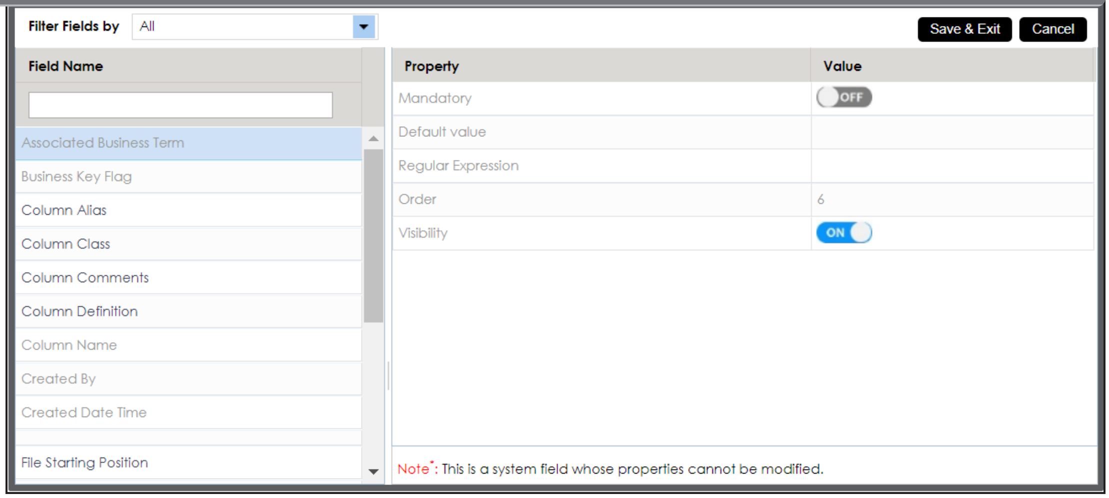
1. Go to **Application Menu** > **Settings** > **Miscellaneous Configurations** > **Form Validation Settings**.

   The following page appears.

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

   The Configure Form Fields page appears.



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

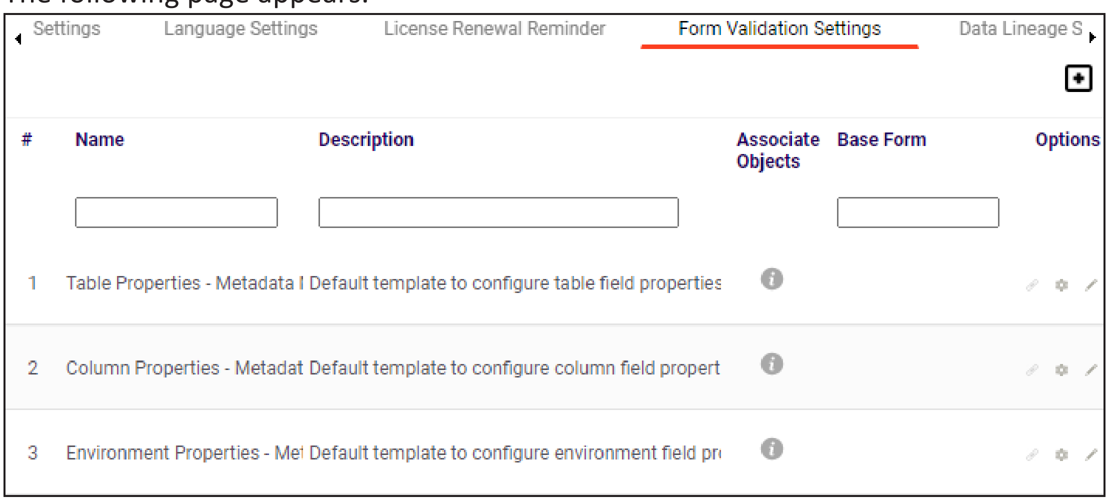
Association of a form depends on the type of the form. You can associate forms in the following manner:

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.

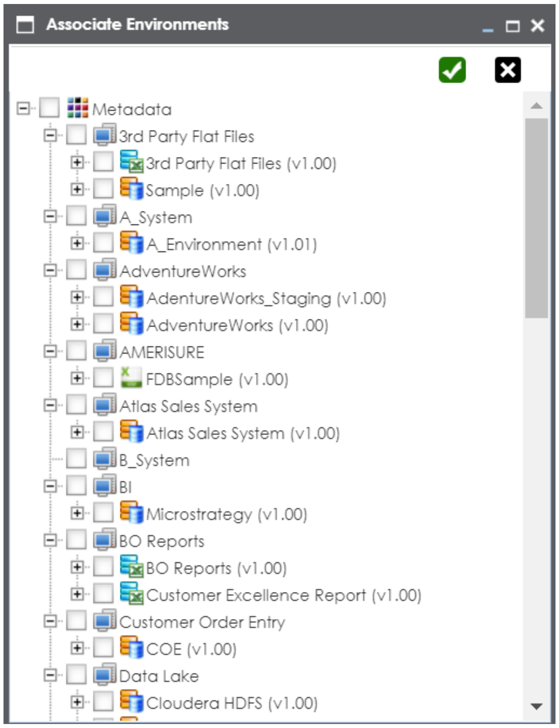
To associate forms, follow these steps:

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

   The following page appears.

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



3. Select the systems or environments, and click .

   The form is associated.

Managing Forms

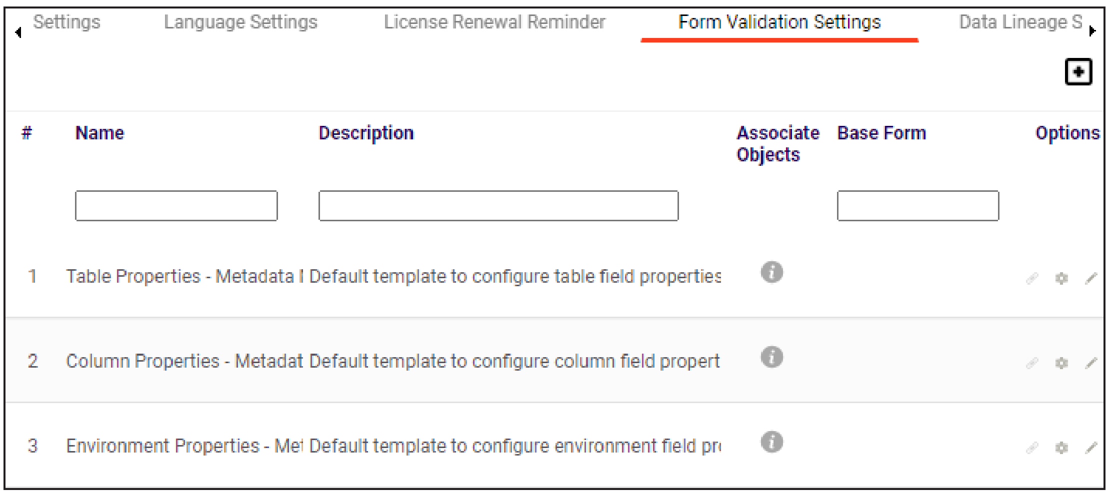
Managing forms involves:

- Editing Forms
- Deleting Forms
- Viewing Activity Logs

To manage forms, follow these steps:

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

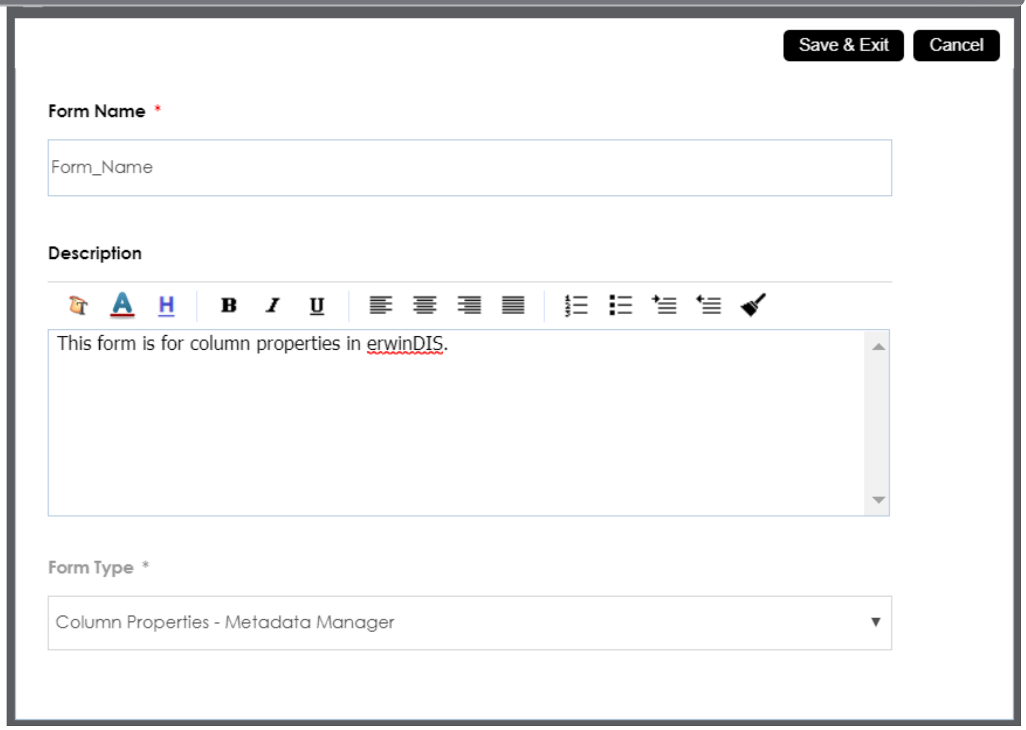
   The following page appears.

2. Use the following options to manage forms:

   Edit ( )

   To edit forms, click .



Delete ()

To delete forms, click .

History ()

To view the activity log of the forms, click .

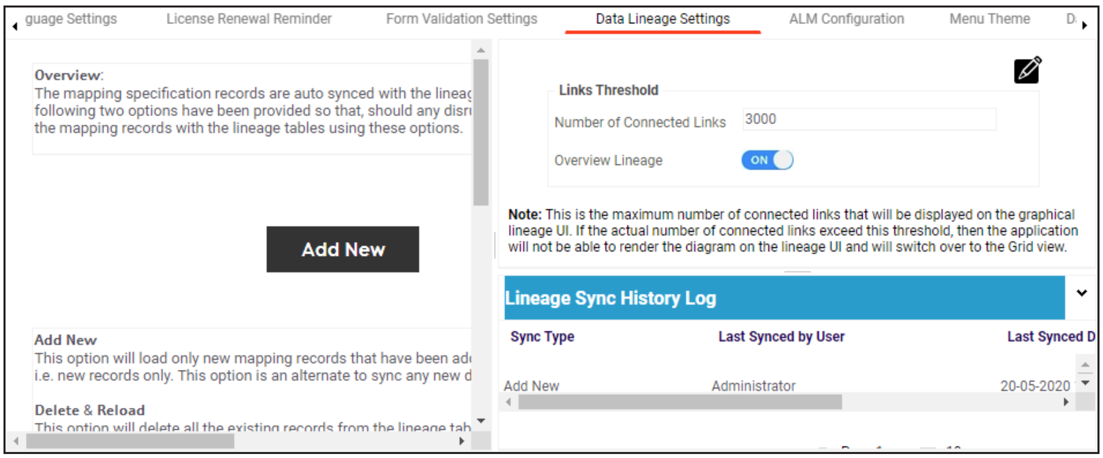
Data Lineage Settings

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.



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.

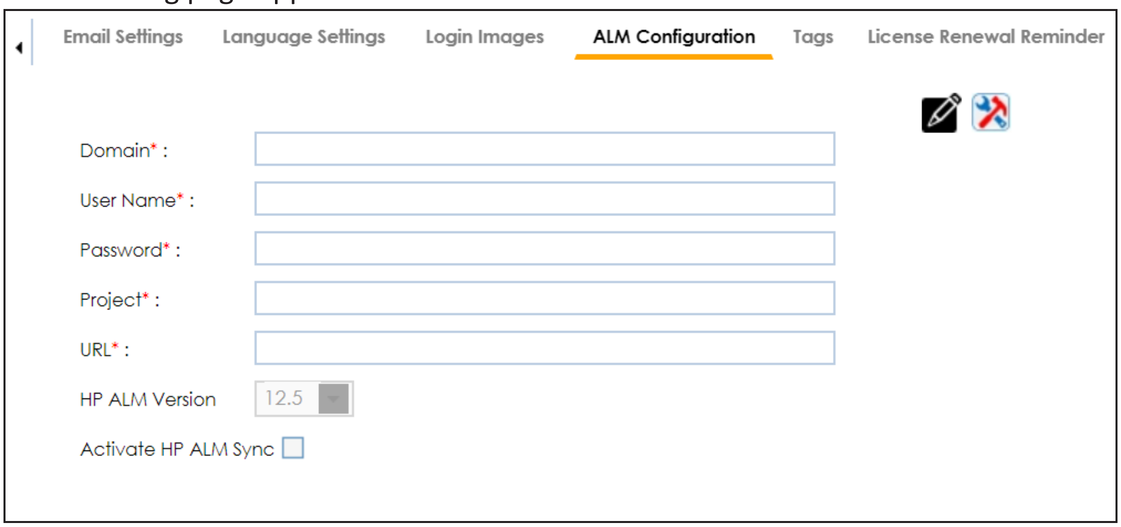
Configuring HP ALM

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.

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 activ-ated. Select the check box to sync HP ALM with erwin DI.

4. Click to test the connection.

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

5. Click .

   The HP ALM is integrated with the Test Manager.

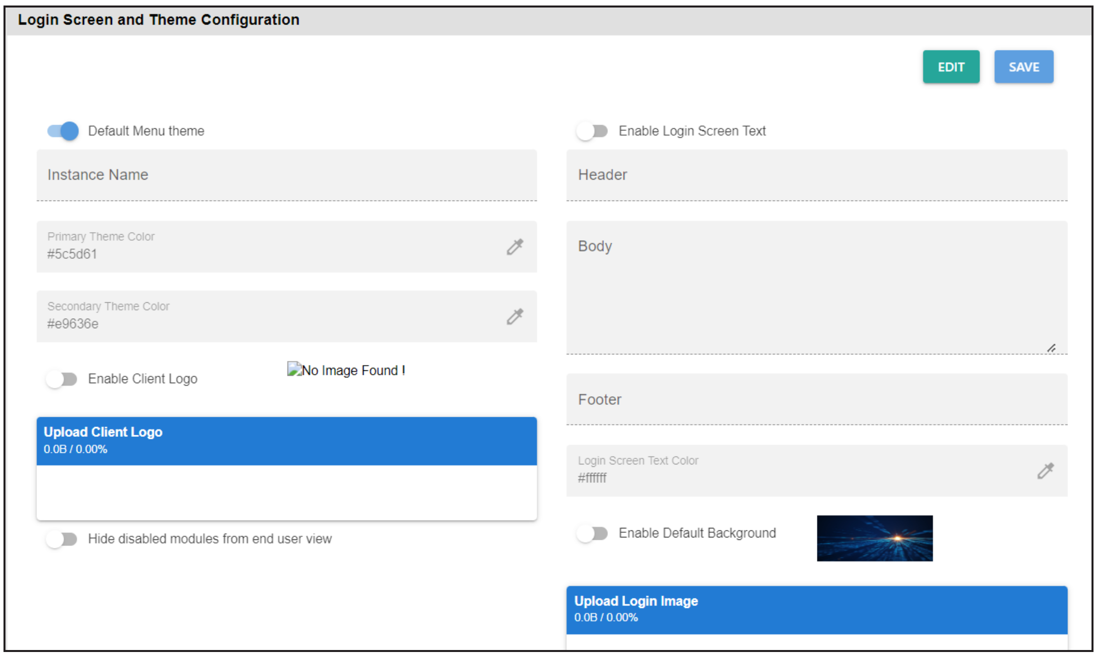
Configuring Menu Theme

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

To configure menu theme, follow these steps:

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

   The following page appears.



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

   Default Menu Theme

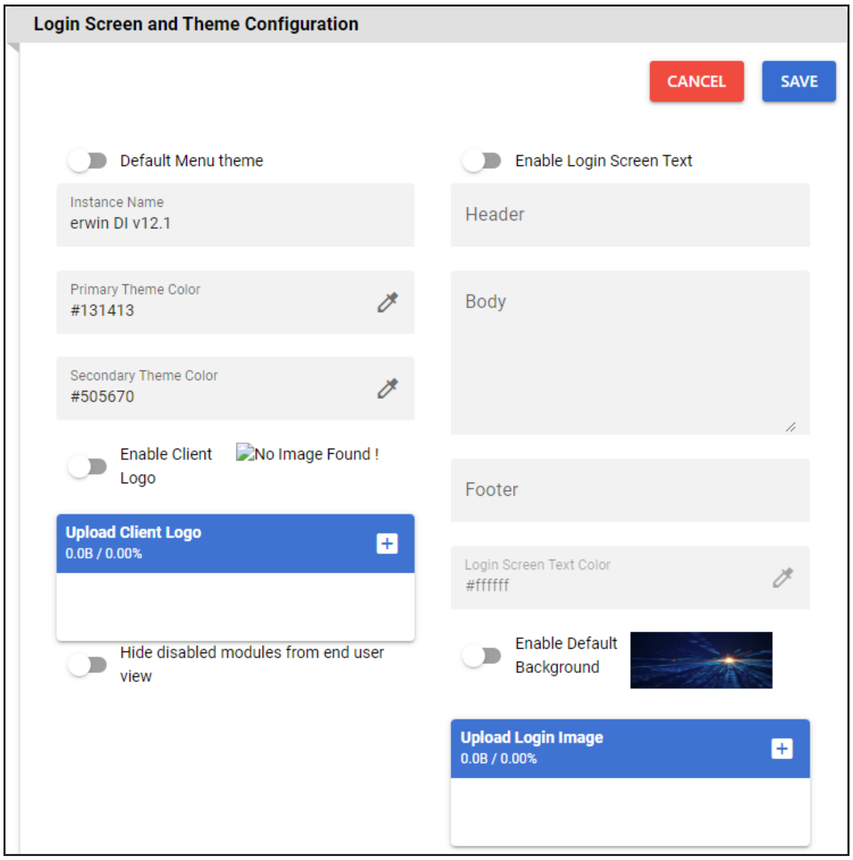
   Use this option to switch between default theme and custom menu themes. You can select theme colors for a custom menu theme whereas the default menu theme has the following colors:

- **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.

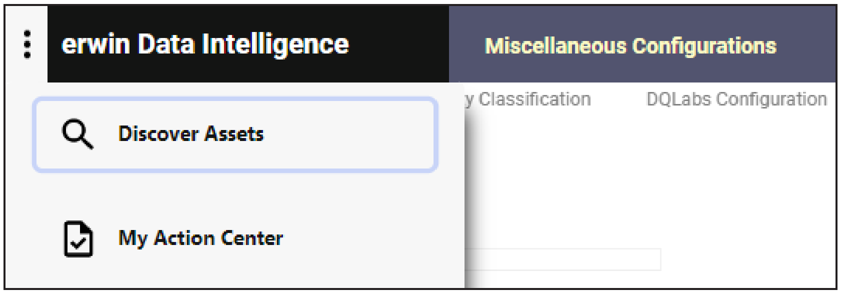


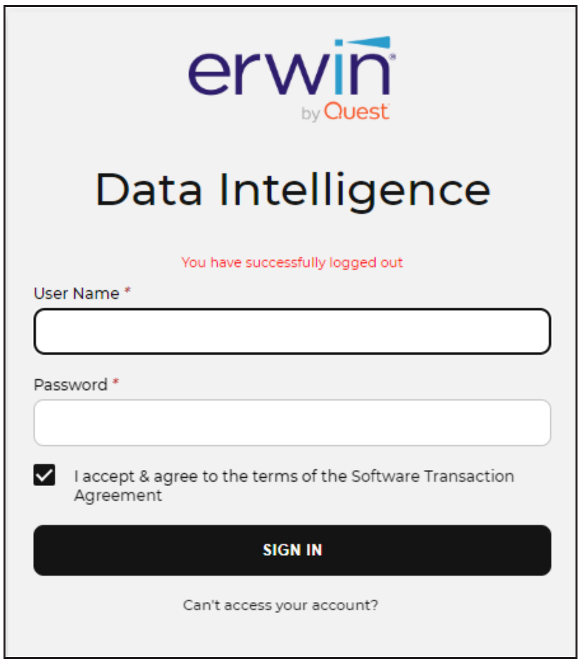
Primary Theme Color

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

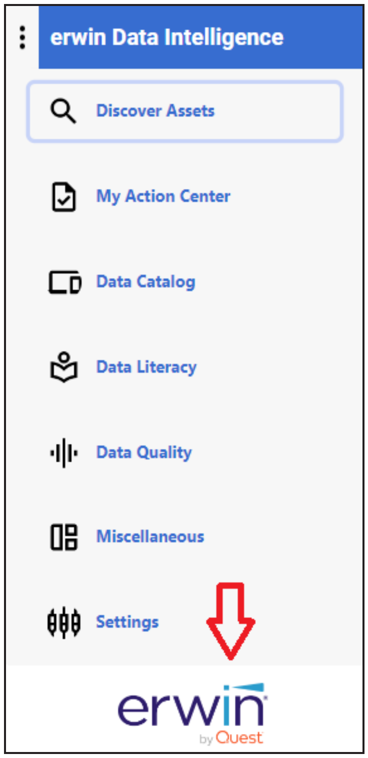
You can use this option only when Default Menu Theme is switched to . Use this option to configure the theme color of the navigation pane.

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.

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**.

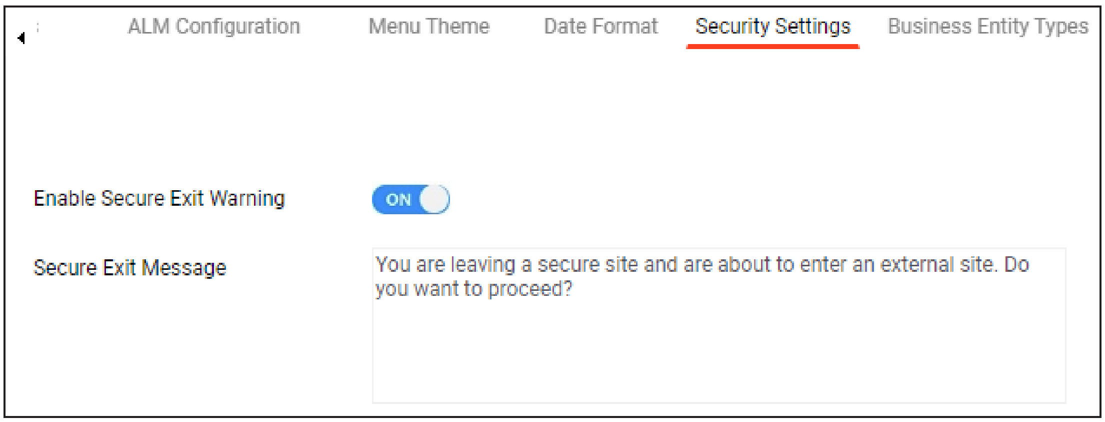
The menu theme is configured.

Configuring Security Setting

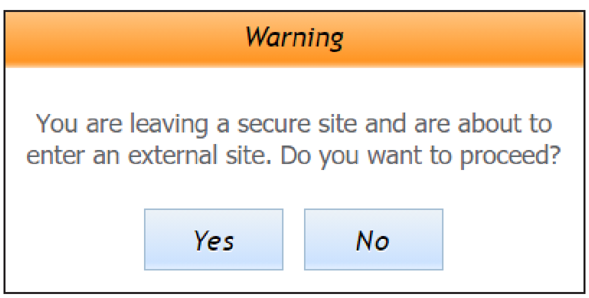
Under security settings, you can configure whether you are notified when you navigate out of erwin Data Intelligence (erwin DI) to an external website or application. You can also customize the message that is displayed in the warning.

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.



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.



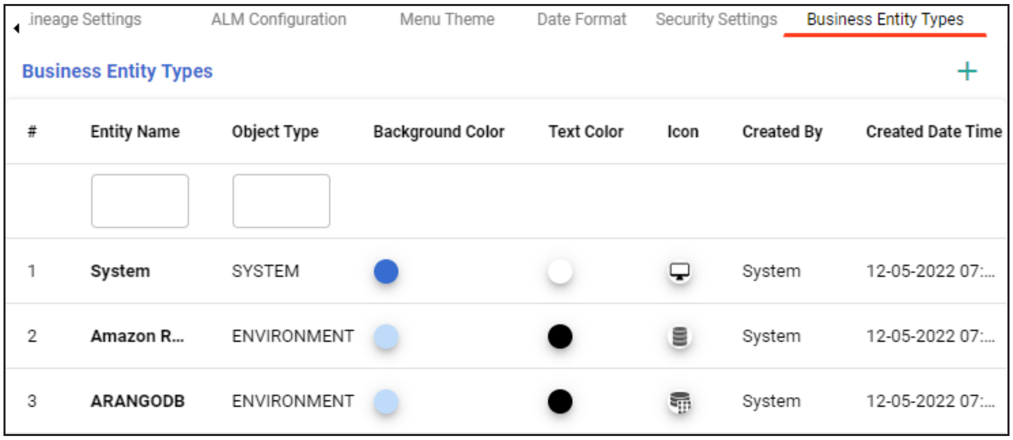
You can add or edit the **Secure Exit Message**.

Configuring Business Entity Types

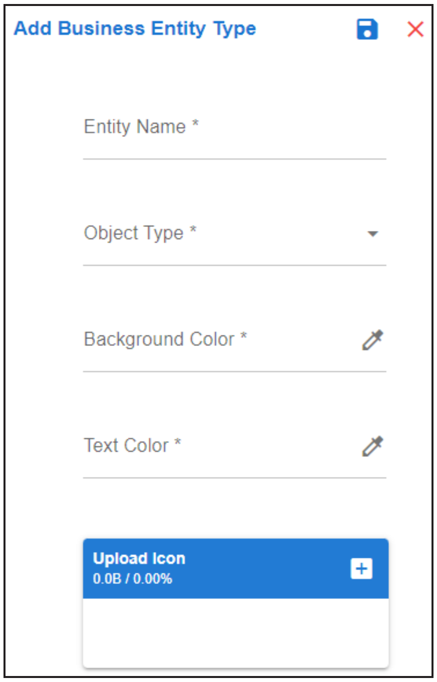
You can configure background color, text color, and icon of any environment and table.

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

   The following page appears.



2. Click + .



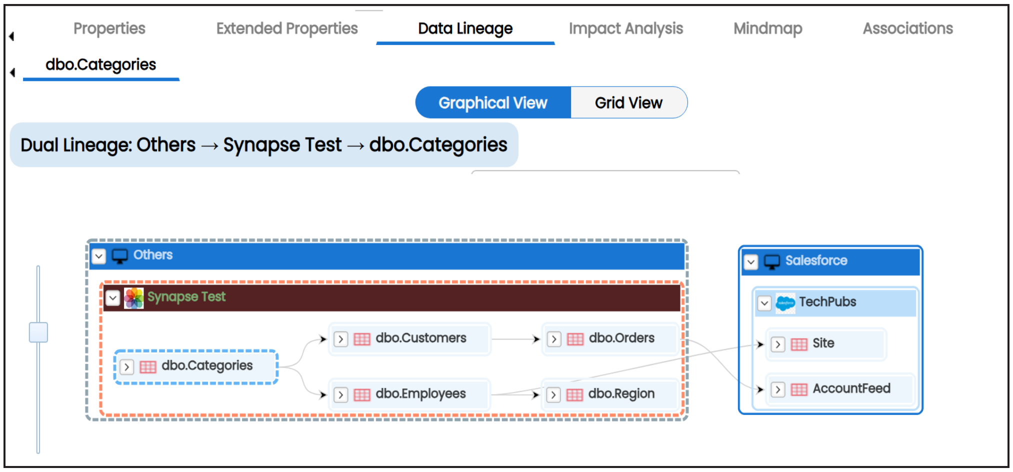
3. Enter appropriate values in the fields. Fields marked with an asterisk are mandatory. Refer to the following table for field descriptions.

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.

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.

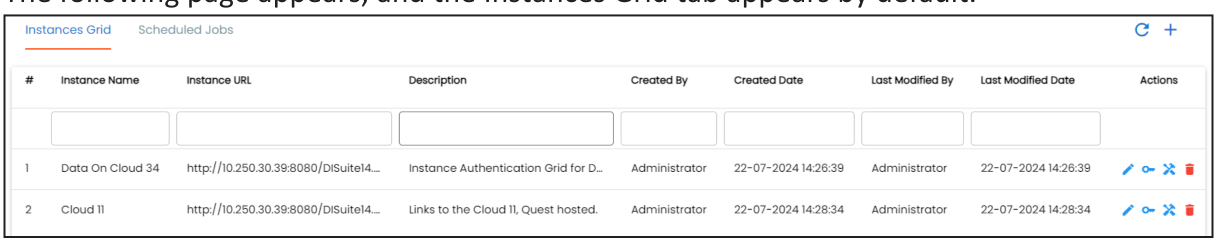
For more information about configuring erwin DI Cloud, refer to erwin DI Cloud Configuration.

> 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.

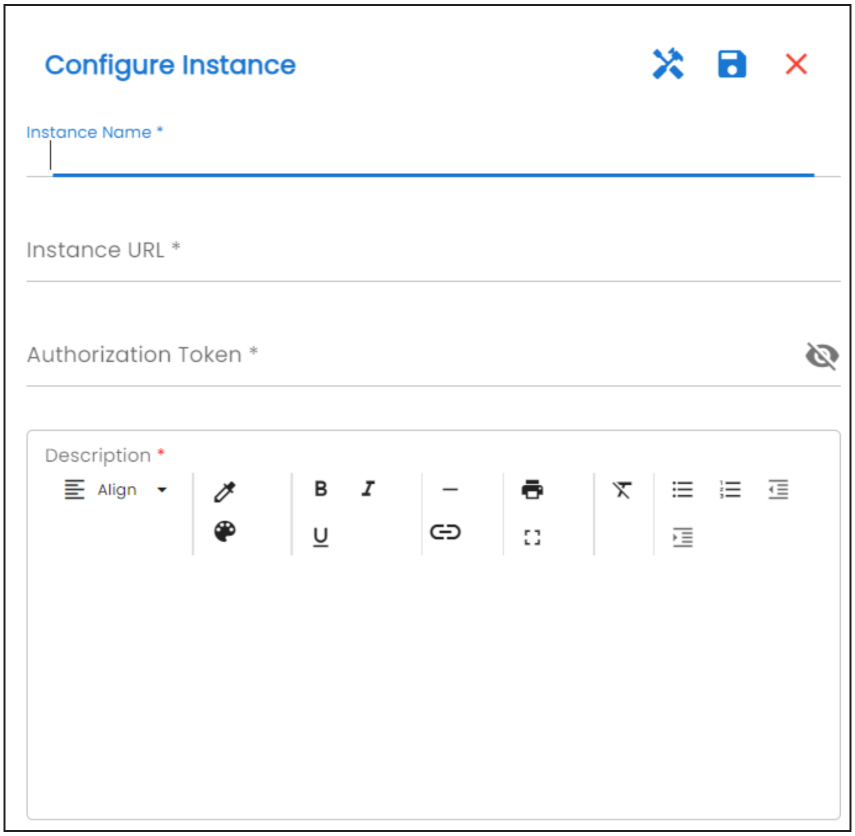
To configure the IDR settings, follow these steps:

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

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

2. Click +.



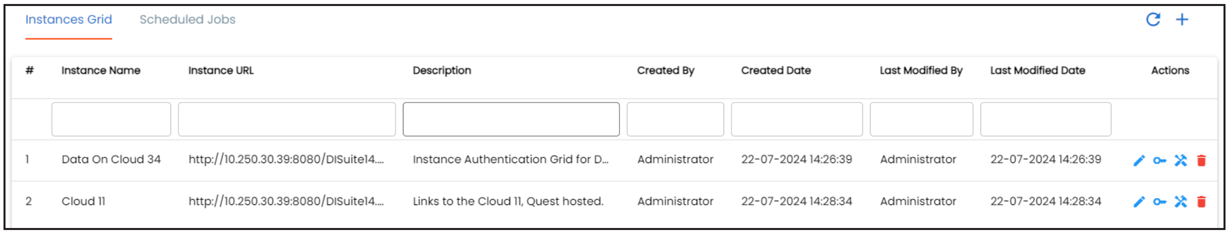
3. Enter appropriate values in the fields. Fields marked with an asterisk (*) are mandatory. Refer to the following table for field descriptions.

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.

Field Name	Description
Description	Specifies the description of the instance.

4. Click to test the connection between the instances.
5. 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/DISuite14...	Instance Authentication Grid for D...	Administrator	22-07-2024 14:26:39	Administrator	22-07-2024 14:26:39	
2	Cloud 11	http://10.250.30.39:8080/DISuite14...	Links to the Cloud 11, Quest hosted.	Administrator	22-07-2024 14:28:34	Administrator	22-07-2024 14:28:34	

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

You can manage the IDR configuration using the following options:

- **Edit** ():
  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

Afterconfiguring 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.

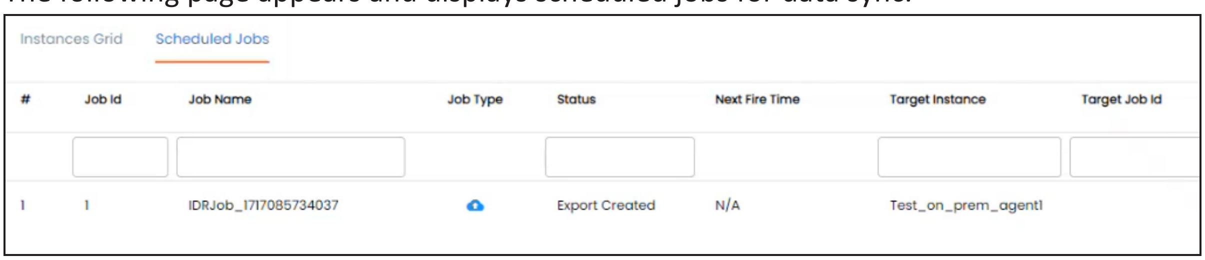
For more information about the steps to configure erwin DI Cloud, refer to erwin DI Cloud Configuration.

> 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:

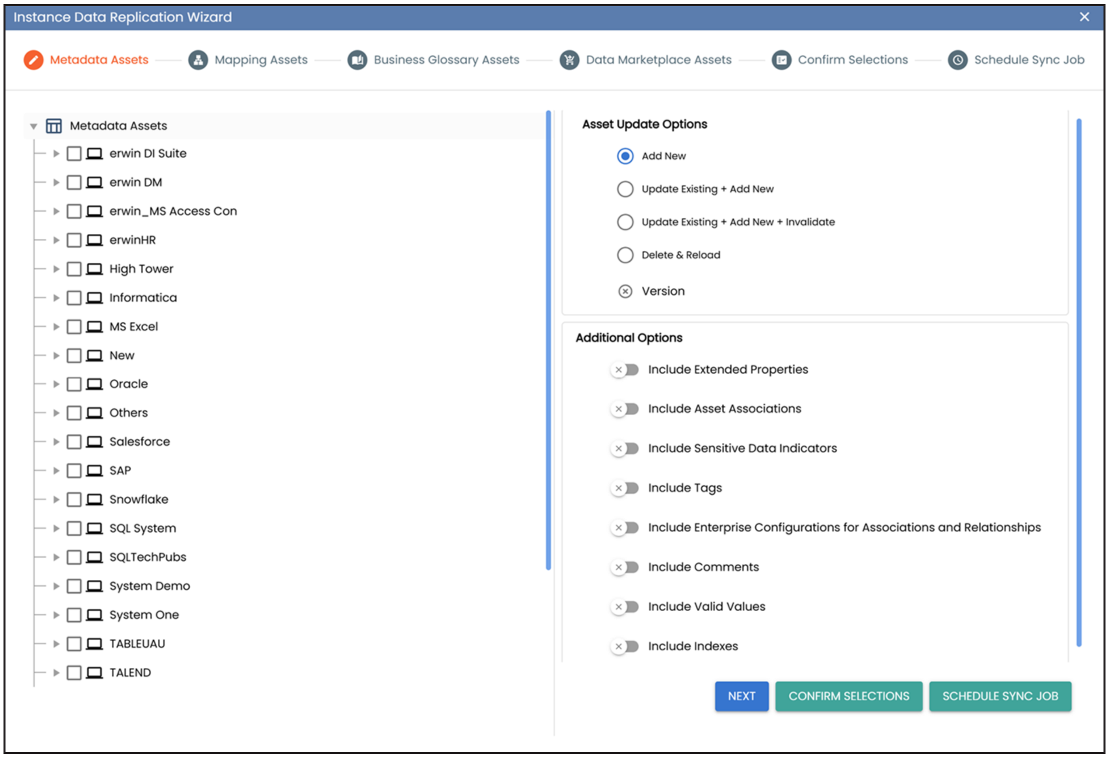
1. Go to **Application Menu** > **Settings** > **Miscellaneous Configurations** > **IDR Configuration** > **Scheduled Jobs**.

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

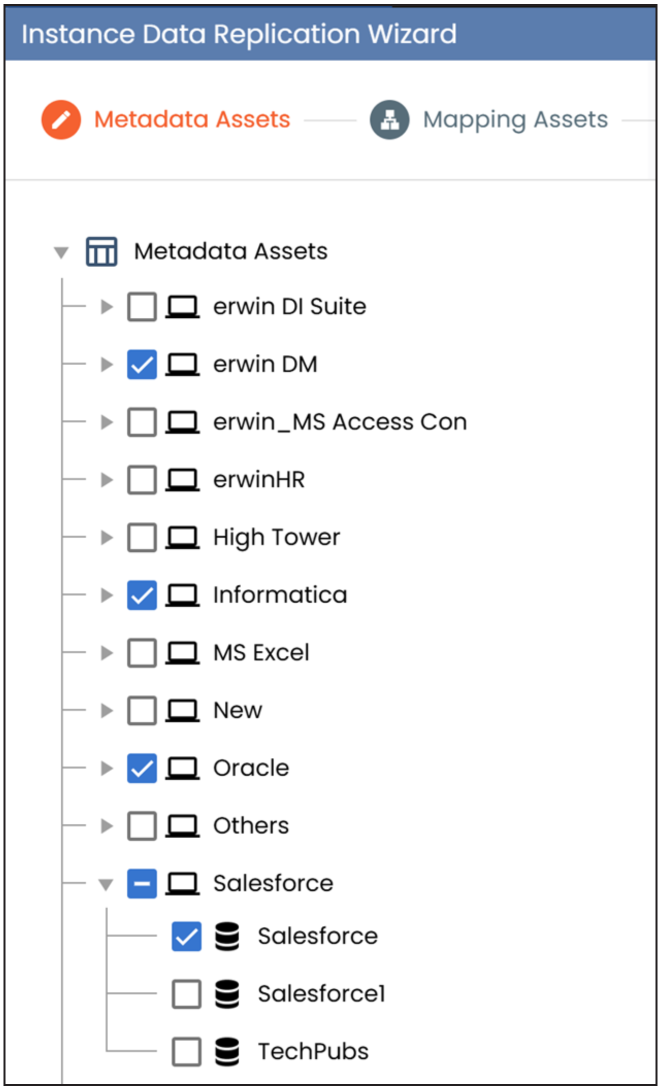
2. Click +.

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.

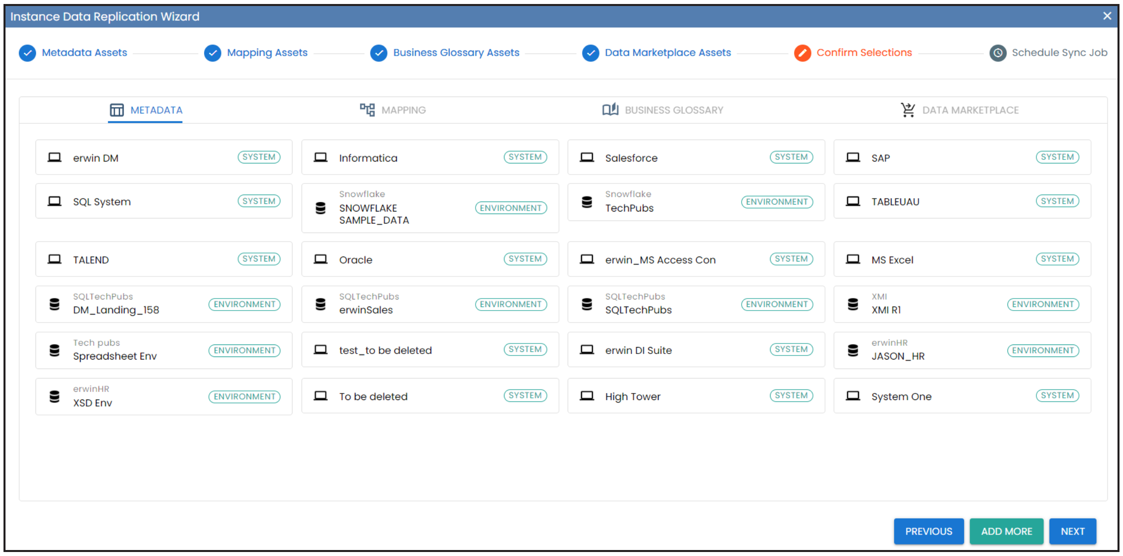
3. On the Metadata Assets tab, select the required assets for data replication. You can also expand a system node to select specific environments for data rep-



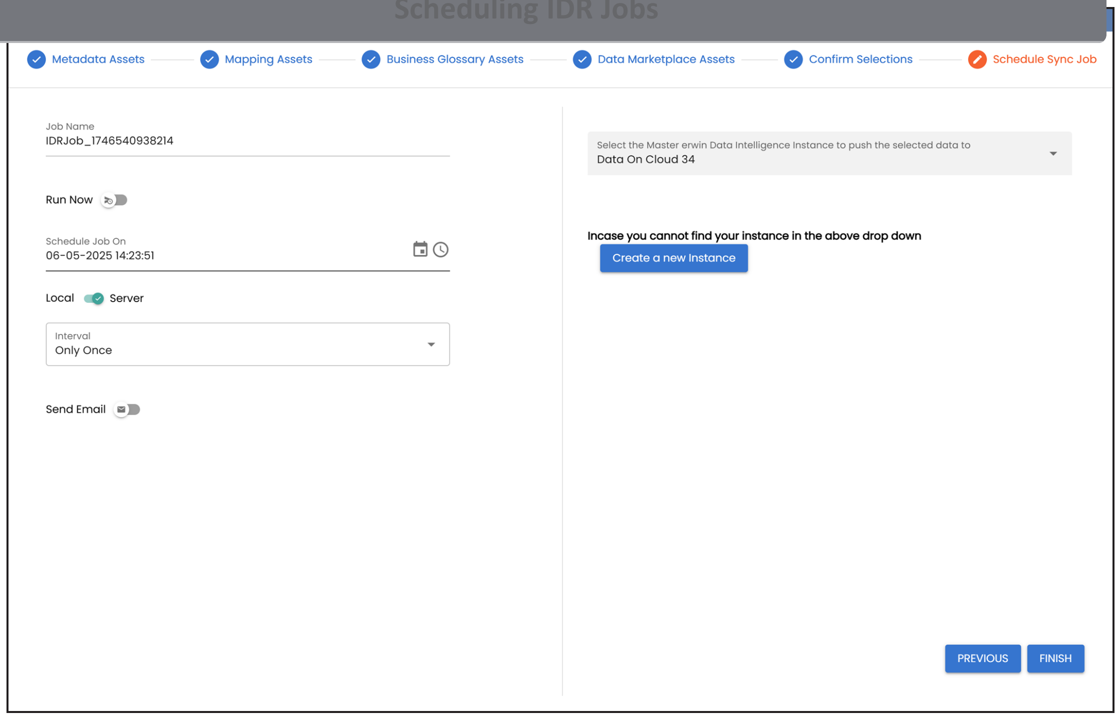
4. On the Metadata Assets tab, choose the asset update options and additional options based on your requirements. For more information on these options, refer to the Asset Update Options section.
5. Click **Next**. This action navigates you to the different asset types for data selection and replication.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

navigate to a different asset type to continue you 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.



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.

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.

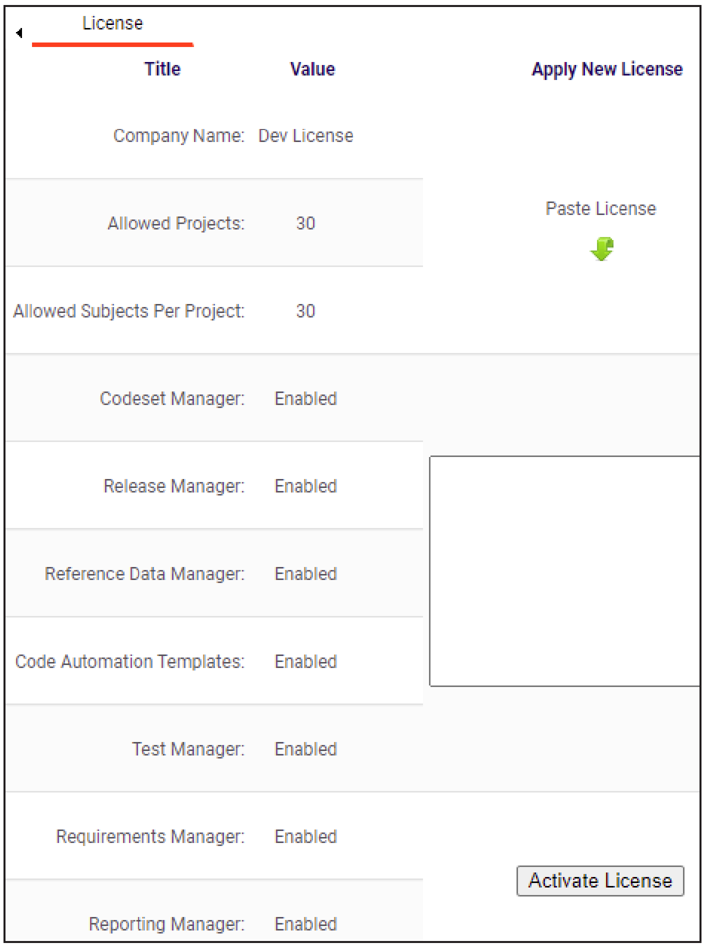
Section	Option	Description
	Include Sensitive Data Indicators	Switch this option **ON** to include the sensitive classification associated with the asset.
	Include Tags	Switch this option **ON** to include the tags associated with the asset.
	Include Enterprise Configurations for Associations and Relationships	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.



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.

Title	Description
Company Name	Specifies the name of your company/organization.
Allowed Projects	Specifies the allowed number of projects that you can create in Mapping Manager. For example, when the value is set as 30, you can create 30 projects in Mapping Manager.
Allowed Subjects Areas Per Project	Specifies the allowed number of subject areas that you can create per project. For example, when the value is set as 2, you can create 2 subject areas in a project.
Modules	Specifies the list of modules that are enabled for this license. Your license can include modules, such as Metadata Manager, or Mapping Manager, or Code Automation Template, or other relevant modules based on your license. The value **Enabled** indicates the module is included with your license.
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.

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.

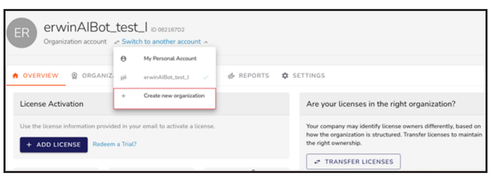
Creating Organizations

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:

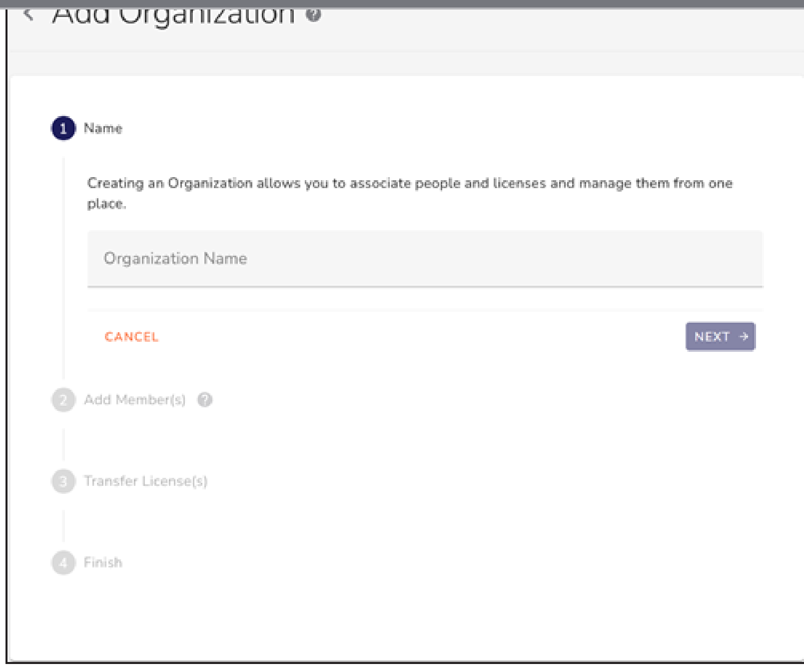
1. Log in to the Quest Licensing portal using the same email address that received the welcome email.

   The portal home page opens.

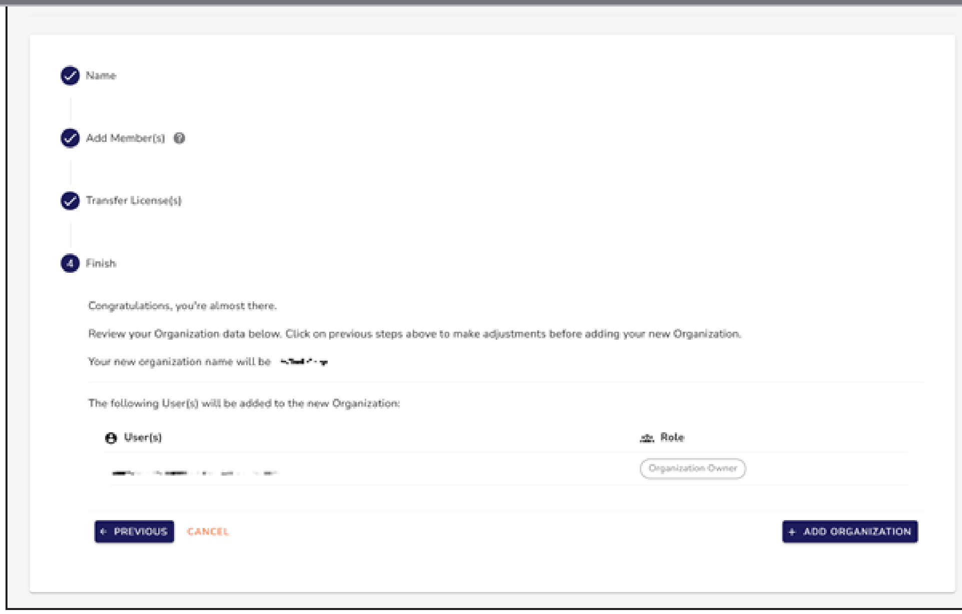
2. Click **Switch to another account**, and then select **Create new organization**.

   The Add Organization page opens.



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.



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

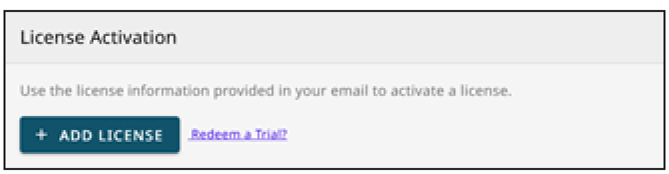
   Your organization is added to the Overview tab.

Adding Licenses

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

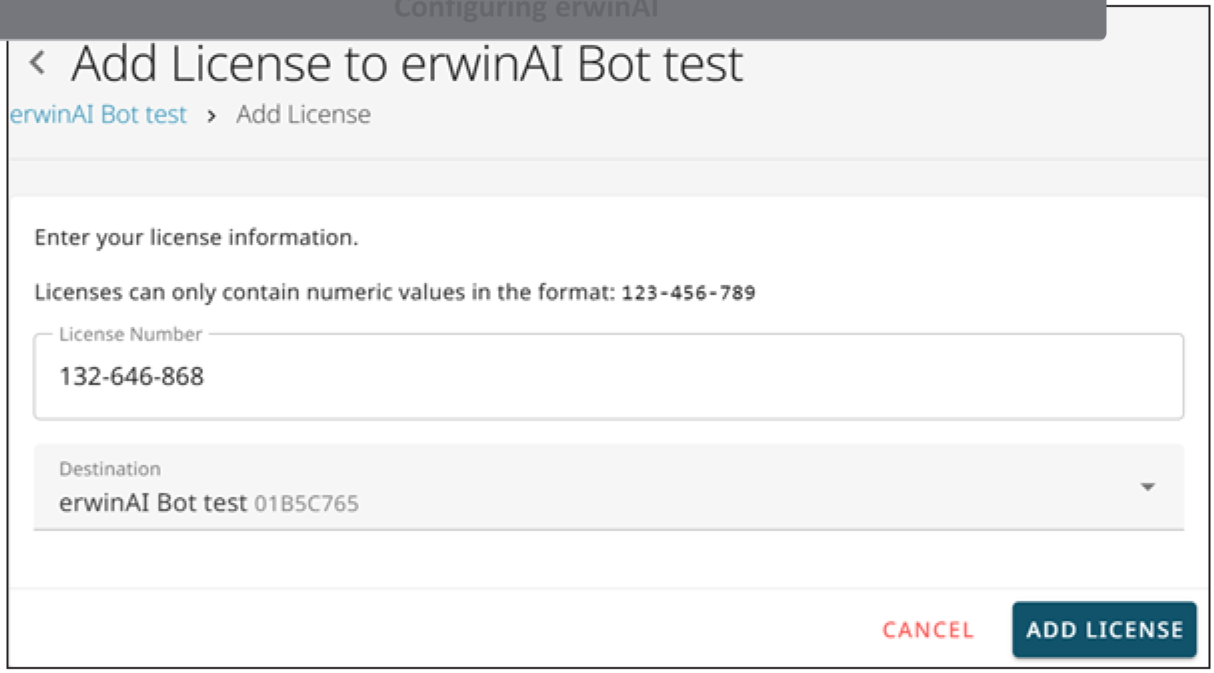
1. Go to the Quest Licensing portal. From the Overview page, locate the organization to which you want to add a license.

   The License Activation section appears.

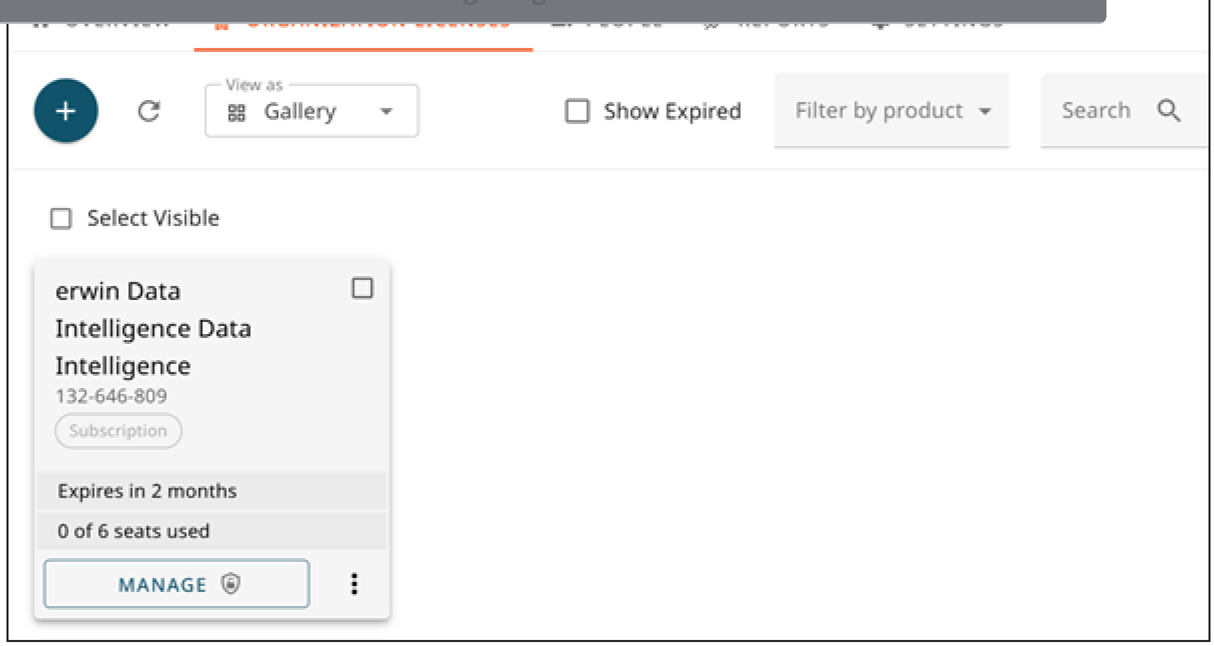
2. In the License Activation section, click **Add License**.

   The Add License to erwinAI Bot page opens.



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.



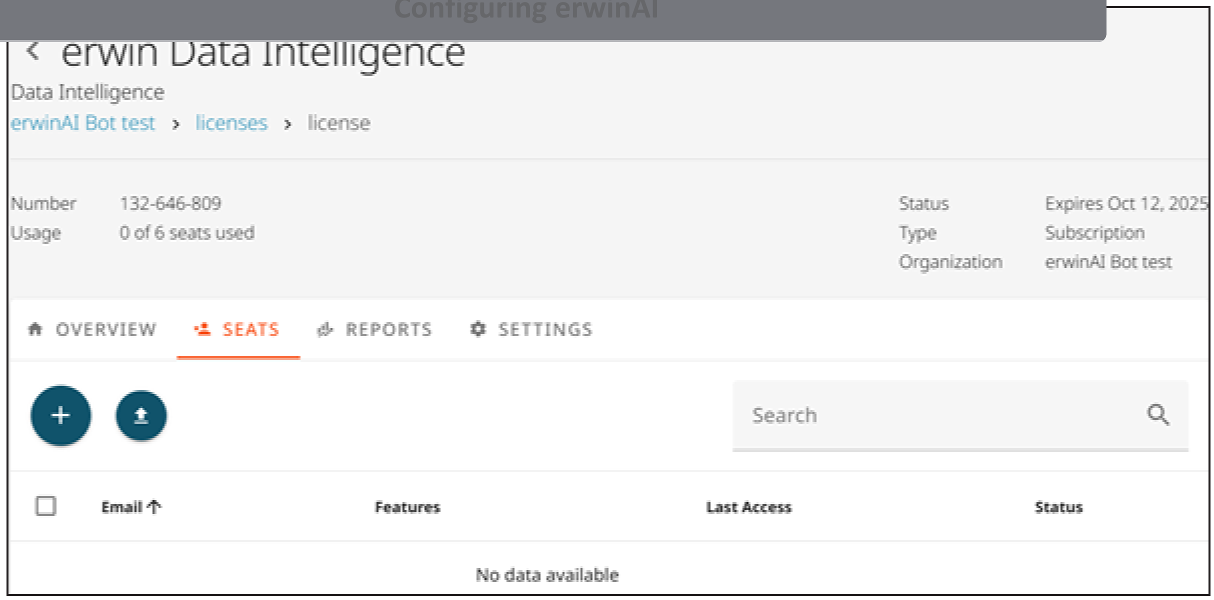
Assigning Users

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

To assign users, follow these steps:

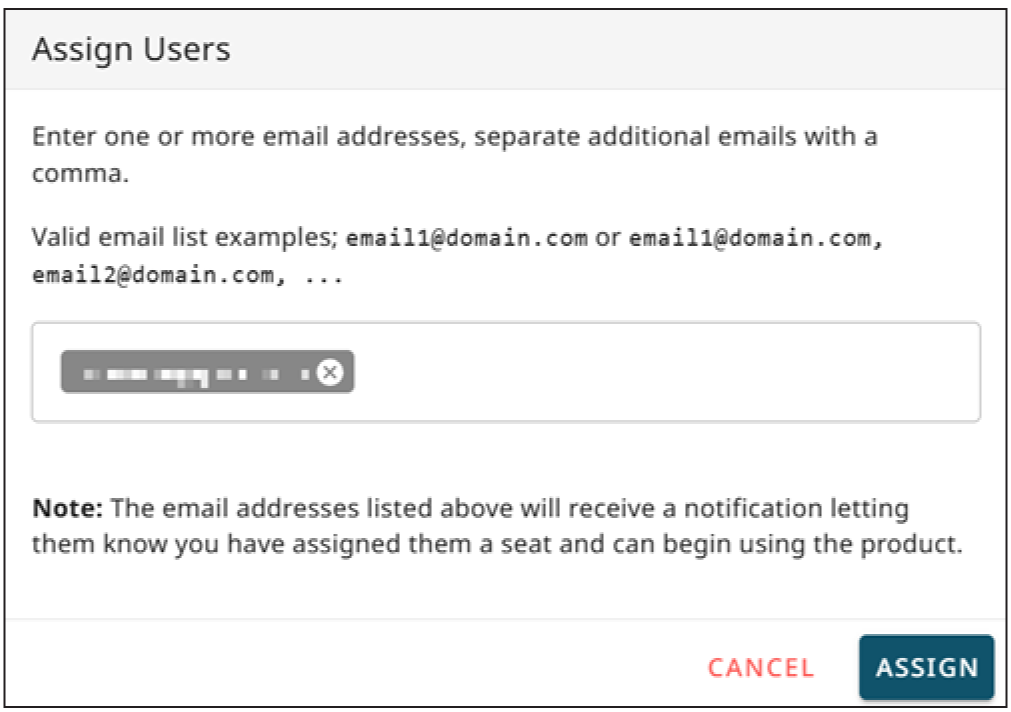
1. Go to the Organization Licenses tab.
2. On the Subscription card, click **Manage**.

   The license page opens.



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

The Assign Users dialog box appears.



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

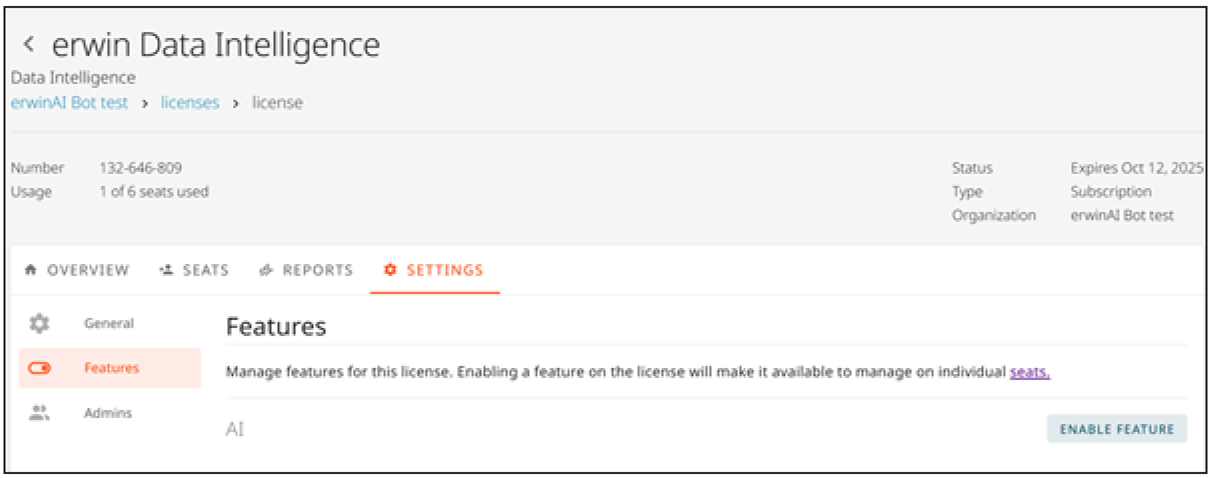
4. Enter the same email address that you used to log in to the Quest Licensing portal, and then click **Assign**.

Enabling the Feature

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

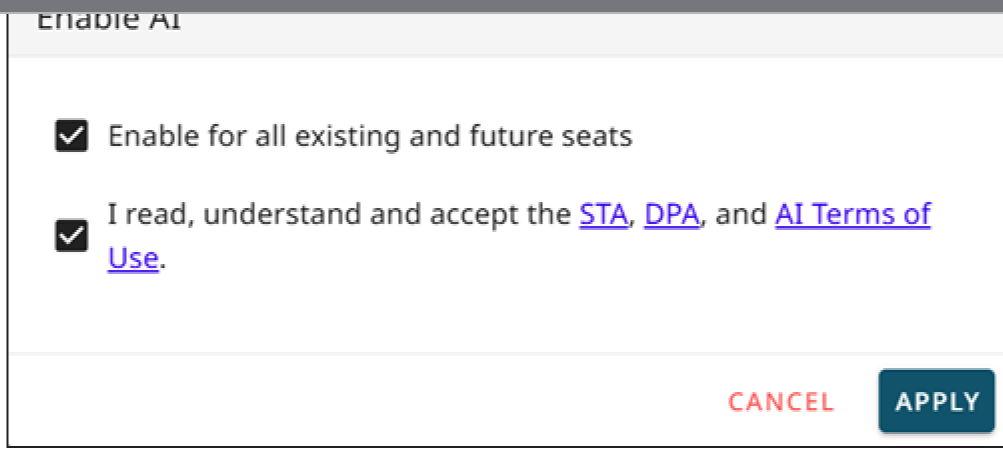
To enable AI feature, follow these steps:

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



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

   The Enable AI dialog box appears.



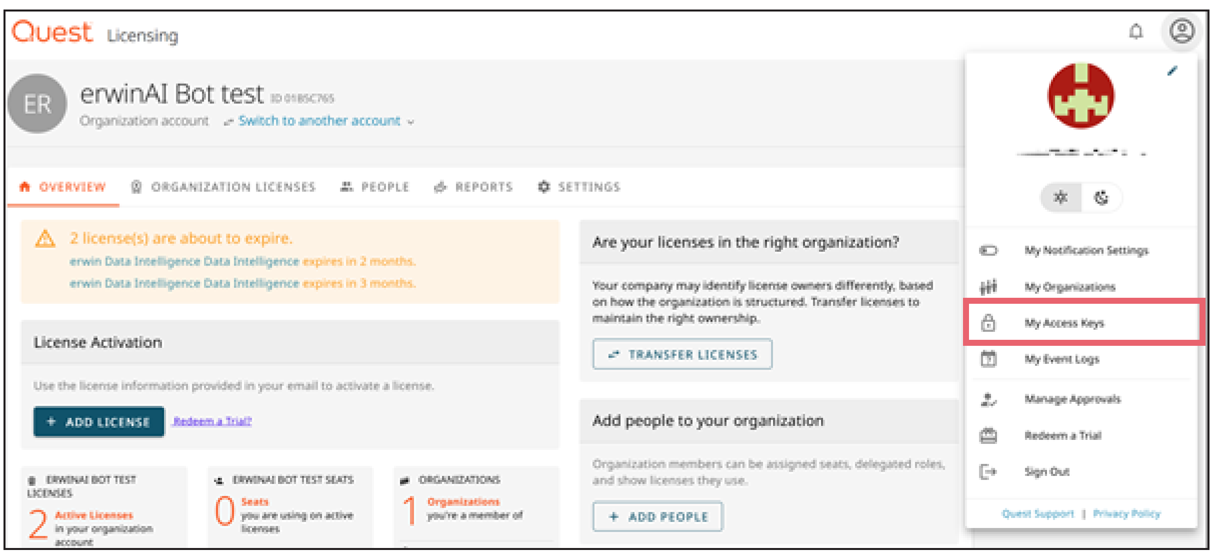
3. Review the terms of usage and select both the conditions, and then click **Apply**.

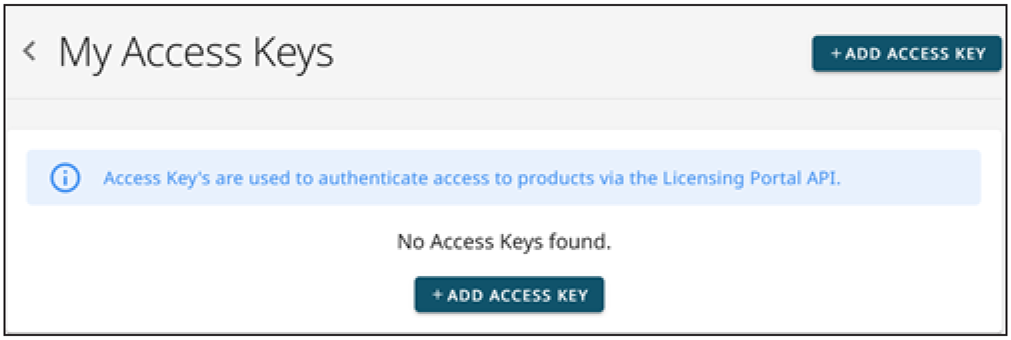
Creating Access Keys

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

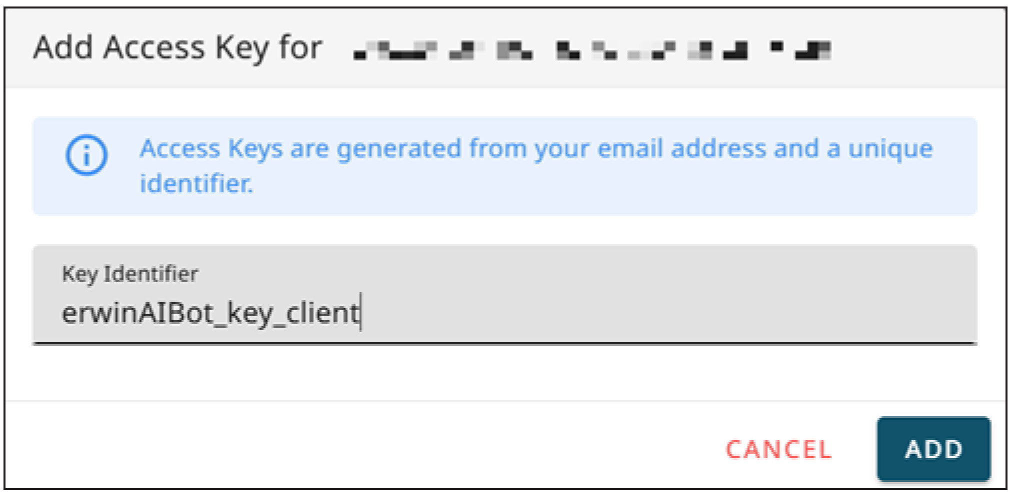
To create access keys, follow these steps:

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



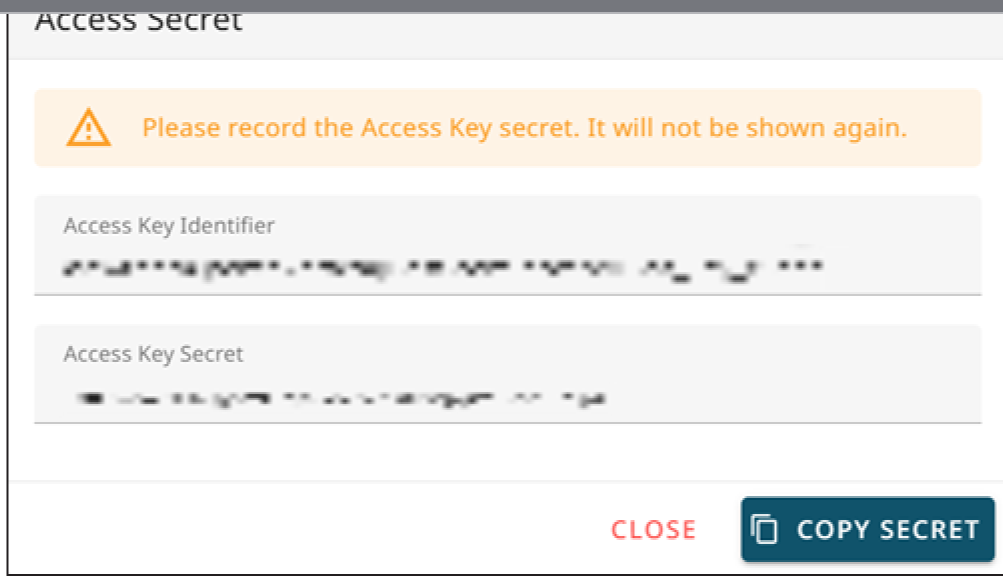


2. Click **Add Access Key**.



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_AIBot\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-

- `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.

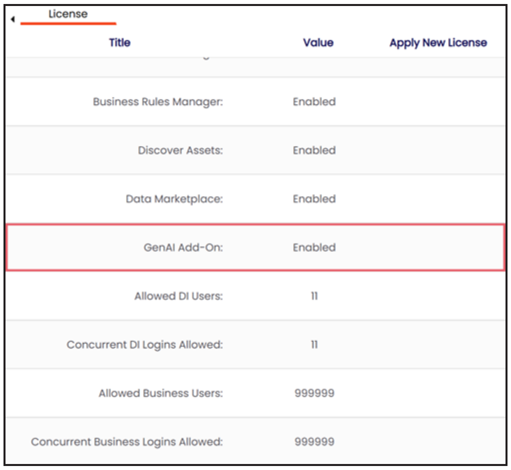
The erwinAI is enabled for you.

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.

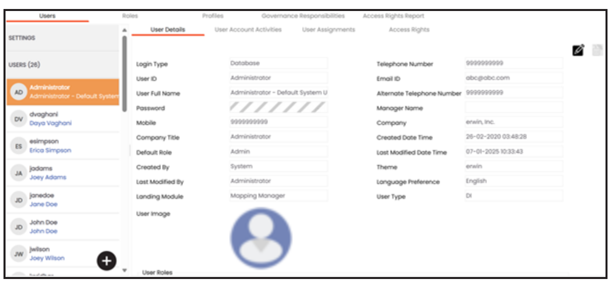


Configuring Roles for the erwinAI Bot 15.1

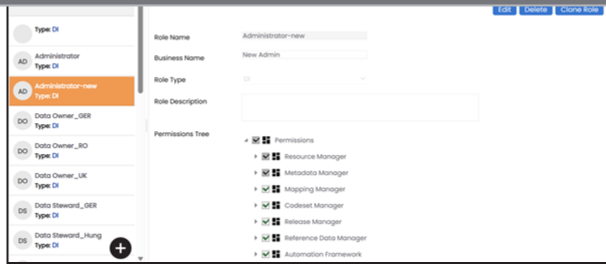
To configure roles for the erwinAI Bot (version 15.1), follow these steps:

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

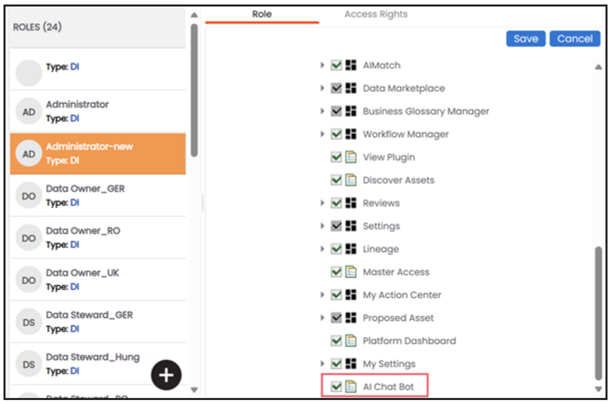
   The Resource Manager page appears. By default, the Users tab opens.

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



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:

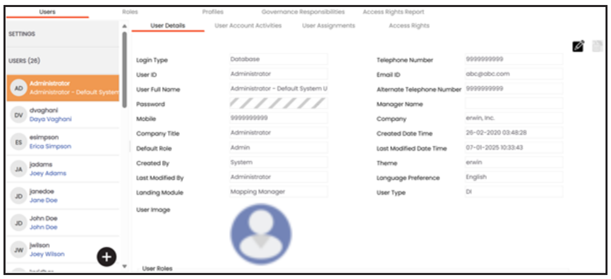
- erwinAI Smart Query Assist
- erwinAI Assistant
- erwinAI Inline Assist

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

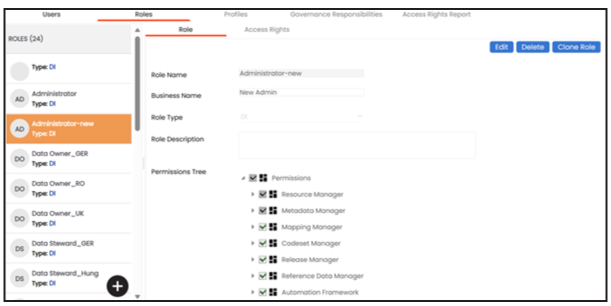
To configure roles for erwinAI features, follow these steps:

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

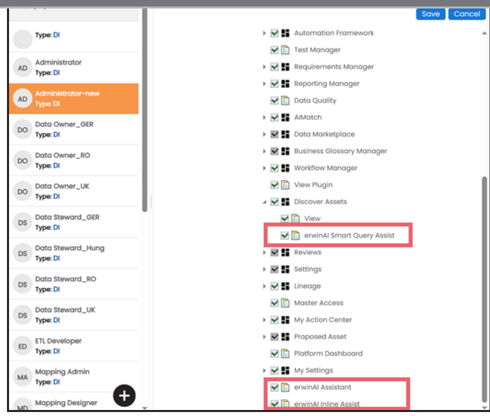
   The Resource Manager page appears. By default, the Users tab opens.

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

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



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.