

GUIDE

erwin Data Modeler

DM Connect for DI Guide 15.0



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Contents

DM Connect for DI Overview	6
Workflow	6
Prerequisites	9
erwin Mart Portal System Requirements	9
erwin DI System Requirements	16
Database Server Specifications	17
Permissions	17
Minimum erwin Mart Permissions	17
Minimum erwin DI Permissions	17
erwin DI DocumentsPath	19
Configuration	20
Scenario: Schedule Jobs to Export Data Models to erwin DI	23
Case I: Run Job	31
Case II: Modify Job	31
Case III: Recurring Job-No Change in Models	31
Case IV: New Model in the Folder	32
Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM	33
Scenario: Export Logical Names from erwin DM to erwin DI	40
Scenario: Sync Business Glossary	45
Prerequisites	45
Downloading and Importing Connector	45
Configuring DM-DI Mart Bridge	49

Harvesting Glossary to erwin Mart Portal	51
Scenario: Import Source and Target Data into Mapping Manager	55
Scenario: NSM Files	57
Case I: One NSM File, Multiple Models	58
Case II: Multiple NSM Files, Multiple Models	58
Scenario: View Logs	59
Reference: Data Sharing between erwin DM and erwin DI	60
Limitations	64

DM Connect for DI Overview

erwin now offers an integration, DM Connect for DI, between two powerful products, erwin Data Modeler (erwin DM) and erwin Data Intelligence (erwin DI). This offering enables you to maintain a single metadata and glossary source across erwin DM and erwin DI using erwin Mart Portal as an interface. Apart from this, DM Connect for DI offers the following benefits:

- Use data models as a foundation for data governance initiatives
- Automatically update data catalog
- Maintain a business glossary based on logical names and naming standards

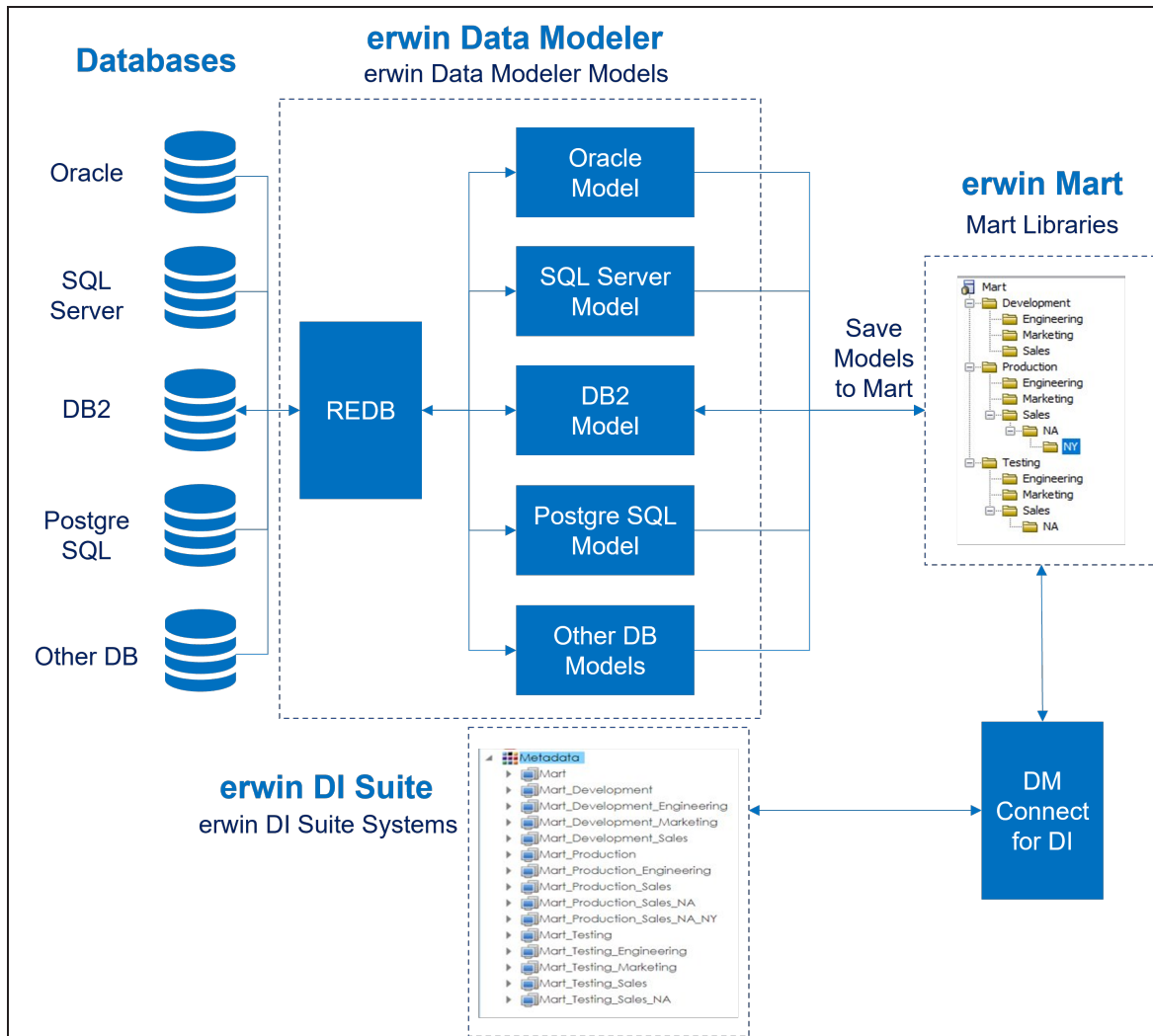
Workflow

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

erwin Mart Portal acts as an interface between erwin DM and erwin DI. It enables you to schedule jobs to export data models and data sources from your mart repository to erwin DI Data Catalog and vice versa. Further, it integrates the naming standards set up on your models into the Business Glossary Manager.

erwin DI enables you to use your data models as a foundation for your data governance initiatives. It enables you to maintain a semantic lineage between metadata and business objects.

To summarize, erwin Data Modeler, erwin Mart Portal, and erwin DI work together as follows.



The following table explains the erwin DM, erwin Mart Portal, erwin DI version compatibility:

Products-Versions	erwin DI 12.1	erwin DI 13.0	erwin DI 14.0	erwin DI 15.0	erwin DI 15.1	erwin DI 15.2
erwin Mart Portal 2021R1	No	No	No	No	No	No
erwin Mart Portal 12.0	No	No	No	No	No	No
erwin Mart Portal 12.1	Yes	Yes	No	No	No	No

DM Connect for DI Overview

Products-Versions	erwin DI 12.1	erwin DI 13.0	erwin DI 14.0	erwin DI 15.0	erwin DI 15.1	erwin DI 15.2
erwin Mart Portal 12.5	No	Yes	Yes	No	No	No
erwin Mart Portal 12.5.1	No	Yes	No	No	No	No
erwin Mart Portal 12.5.2	No	Yes	Yes	No	No	No
erwin Mart Portal 14.0	No	No	Yes	No	No	No
erwin Mart Portal 14.1	No	No	No	Yes	No	No
erwin Mart Portal 15.0	No	No	No	No	Yes	Yes
erwin Mart Portal 15.1	No	No	No	No	Yes	Yes
erwin Mart Portal 15.2	No	No	No	No	Yes	Yes

Prerequisites

Before configuring erwin DM Connect for , ensure that the prerequisites for erwin Mart Portal and erwin Data Intelligent (erwin DI) are in place:

- System requirements:
 - [erwin Mart Portal](#)
 - [erwin DI](#)
- Permissions:
 - [erwin Mart Portal](#)
 - [erwin DI](#)
- [erwin DI DocumentsPath](#)

erwin Mart Portal System Requirements

Refer to the following tables for minimum system requirements:

Parameter	Requirement	Additional Information
Hardware/Workstation	• VM or Dedicated Physical Server • Windows-based workstation • 100 GB of disk space or more as required to support your specific mart • Processor - 64-bit, minimum 4 cores • RAM: • Only erwin Mart Portal: 16 GB • Both erwin Mart Portal and erwin ER360: 32 GB 16 GB RAM is the basic configuration for erwin Mart Portal, and 32 GB RAM is the basic configuration for erwin Mart Portal and erwin ER360.	
Operating System	• Microsoft Windows Server 2016 • Microsoft Windows Server 2019 • Microsoft Windows Server 2022 • Microsoft Windows Server 2025 • All current Microsoft Windows critical	

Prerequisites

Parameter	Requirement	Additional Information
	updates	
Database	• Microsoft SQL Server 2017, 2019, 2022, and 2025. You can also use Microsoft SQL Azure and Amazon RDS SQL Server. • Oracle 18c, 19c, 21c, and Oracle Cloud • PostgreSQL 12.x, 13.x, 14.x, 15.x, 16.x, and 17.x. You can also use PostgreSQL for Amazon RDS. • For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2	SQL Server: • The Mart Portal can use a standalone or share an existing database server for a Microsoft SQL Server. • The SQL Server 2017, 2019, 2022, and 2025 TRUSTWORTHY database property is no longer required for the mart. After you install this product, you can optionally reset this property to OFF. • The database user account that is used to configure the Mart must have the db_owner role assigned. • (Optional) To use the Korean language, use the Korean_wansung_CI_AS character set. Select the

Prerequisites

Parameter	Requirement	Additional Information
		character set while creating the Mart database (in the Collation field). For more information, see the SQL Server documentation. Oracle: • The Mart Portal can use a standalone or can share an existing database server for an Oracle database. You can also use a plugable database. • To create the Mart, you must be the database schema owner user and you must have the DBA role in the target database on the Oracle server. The DBA role is required for the user who is specified in the Configure Mart Portal dialog. If

Prerequisites

Parameter	Requirement	Additional Information
		the DBA privilege of this user is revoked, then erwin DM users will not be able to save model changes to the Mart. • (Optional) You have modified the following parameters in the initialization file (InitSID.ora): <code>Remote_OS_Authent=T</code> <code>OS_Authent_Prefix=TRUE</code> • (Optional) To use the Korean language with the Mart database, use KO16MSWIN949 or AL32UTF8 character set depending on your operating system language pack. For more information, see the Oracle documentation. • If the Mart database is an

Prerequisites

Parameter	Requirement	Additional Information
		Oracle data-base, the default tablespaces that were used for initializing any earlier release of r9 series Mart are available for the latest release. PostgreSQL: • The Mart Portal can use a standalone or can share an existing database server for PostgreSQL. • The database user account that is used to configure the Mart must have super user permissions.
erwin Mart Portal Web Client - Browser	Latest versions of the following browsers: • Microsoft Edge • Mozilla Firefox • Google Chrome • Apple Safari	
Web Client Workstation	• Processor - i3 or higher • RAM - 8 -16 GB • Minimum Free Space - 8 - 16 GB	
Web Server	Apache Server 2.4.65	

Prerequisites

Parameter	Requirement	Additional Information
JDK	21.0.7	
MartPortal Service	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: <pre>reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinMartPortal\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" -Xms2048m -Xmx10240m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-portal.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\MartPortal.jar\"\" /f</pre>	The required RAM size ranges from 2 to 10 GB for all services.
ER360 Service	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: <pre>reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinER360\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" -Xms2048m -Xmx10240m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-er360.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\ER360.jar\"\" /f</pre>	
Vault Service	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: <pre>reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinVaultService\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" -Xms2048m -Xmx10240m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-vaultservice.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\vaultservice.jar\"\" /f</pre>	
Job Scheduler Service	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs:	

Prerequisites

Parameter	Requirement	Additional Information
	<pre>reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinMartJobSchedulerService\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe" -Xms2048m -Xmx10240m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-mart-jobschedulerservice.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\MartJobScheduler.jar\" /f</pre>	
Search Service	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: <pre>reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinSearchService\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe" -Xms2048m -Xmx10240m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-searchservice.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\search-service.jar\" /f</pre>	
Cache Service	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: <pre>reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinCacheService\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe" -Xms2048m -Xmx10240m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-cacheservice.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\cache-service.jar\" /f</pre>	

Ensure that you always install erwin Mart Portal on Windows operating system.

erwin DI System Requirements

Parameter	Requirement
Hardware/Workstation	• VM or Dedicated Physical Server • Processor - 64-bit, minimum 4 cores • RAM: • 16 GB for limited user POCs • 32-64 GB for enterprise production deployment • Hard Disk Drive - 200-300 GB
Operating System	• Microsoft Windows - Windows Server 2016 and above • Linux v4.19 and above • RHEL 8.0 and 8.5 • Amazon Linux 2
Database	• SQL Server 2016, 2017, 2019 For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2 • Oracle 12c, 18c, 19c
Browser	• Microsoft Edge v86x or newer • Google Chrome v86.0 or higher • Mozilla Firefox v82.0 or higher
Web Servers	Apache Tomcat v9.0.58
Web Server Memory Allocation	Allot at least 50 percent of available memory. For example, if available memory is 16GB, allot at least 8GB.
Web Client Workstation	• Processor - i3 or higher • RAM - 8GB minimum • Minimum Free Space - 1-2GB

In case of enterprise deployment, for the best performance, it is recommended to allot at least 0.5 GB space per user on the application server. For example, if 30 users log on simultaneously, the application server must have at least 15 GB of RAM allocated to it.

The above RAM allocation does not indicate the RAM of the server machine. It indicates the physical RAM allocation to the application server.

Database Server Specifications

The following table lists database server specifications:

Parameter	Requirement
Server Type	Dedicated standalone server
Processor	64-bit, minimum 4-8 cores
RAM	32 GB
Hard Disk Drive	250-500 GB
Tablespace	50 GB, minimum

erwin DI requires a dedicated schema/database (SQL Server or Oracle) with at least 50 GB tablespace allocated to it, which increases exponentially based on usage.

Permissions

To use DM Connect for DI, you need certain permissions on erwin Mart Portal and erwin Data Intelligence (DI).

Minimum erwin Mart Permissions

You can use DM Connect for DI only if your account has been assigned the following profiles:

- Administrator
- Architect

Minimum erwin DI Permissions

Metadata Manager
Create System
Systems/System Tabs/View System Details
List Systems

Prerequisites

Metadata Manager

Systems/Add Environment
Systems/List Environments
Systems/System Environments/Import Environment
Systems/System Environments/New Version
Systems/System Tabs/View Environment Details
Systems/Configure Expanded Logical Name
Systems/System Environments/Environment Tabs/Extended Properties/Edit Extended Properties
Systems/System Environments/Scan Metadata
Systems/System Environments/Environment Tabs/EnvironmentDetails

Mapping Manager

Projects/Create Project
Projects/Mappings/Create Mapping
Projects/Project Tabs/Project Details/View Project Details
Projects/Mappings/Mapping Grid/Edit Mapping Specification Grid (Any one permission in child permissions)

Business Glossary Manager

Custom Objects/Catalog/Create
Custom Objects/Catalog/Edit
Custom Objects/Catalog/View
Custom Objects/Catalog/Custom Objects/Create
Custom Objects/Catalog/Custom Objects/Edit
Custom Objects/Catalog/Custom Objects/View
Custom Objects/Import Catalog

erwin DI DocumentsPath

To be able to export or import data between erwin DM and erwin DI, ensure that you update the **iccdocuments.properties** file in erwin DI as follows:

- **Windows:**

When you install erwin DI on a Windows machine, the correct document path is configured automatically to a default location. If the default installation location changes, ensure you follow these steps.

If you change the default installation location, follow these steps:

1. Open the **iccdocuments.properties** file from the following location:
Apache Software Foundation\Tomcat 8.5\webapps\<Application Name>\WEB-INF\configuration\properties\iccdocuments.properties
2. Change the **DocumentsPath** value to the current installation location:
<drivename>:\<application name>

For example, consider you changed the installation location from the default location to: D:\Apache Software Foundation\Tomcat 8.5\webapps\erwinDISuite\WEB-INF\configuration\properties. Then, change the **DocumentsPath** to: D:/erwinDISuite

- **Linux:**

Ensure that you follow these steps:

1. Open the **iccdocuments.properties** file from the following location:
/opt/tomcat/webapps/<<erwinDISuite>>/WEB-INF/configuration/properties/iccdocuments.properties
2. Change the **DocumentsPath** value to:
opt/tomcat/<application name>

For example, change the **DocumentsPath** from *C:/MappingManager* to: *opt/tomcat/erwinDISuite*

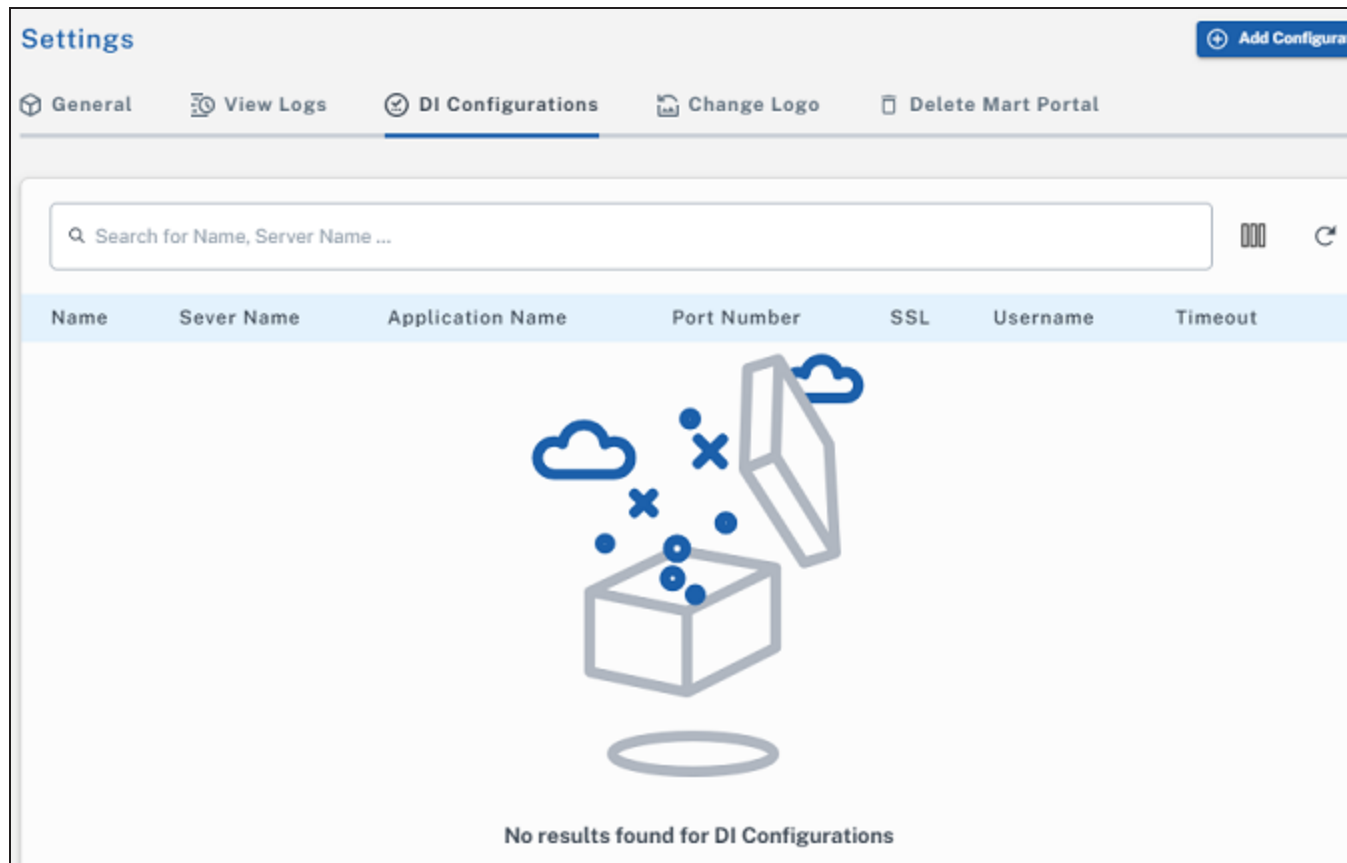
Configuration

To import and export data models, data sources, and naming standards using DM Connect for DI, you need to configure your erwin Data Intelligence (erwin DI) application in erwin Mart Portal.

To configure erwin DI, follow these steps:

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

The DI Configurations page appears.



2. Click **Add Configuration**.

The Add New Configuration section appears.

Settings

Cancel

Test

Save

General

View Logs

DI Configurations

Change Logo

Add New Configuration

Configuration Name *

Enter Configuration Name

Server Name *

Enter Server Name

Application Name *

Enter Application Name

Port *

-1

Enable SSL *

False

Username *

Username

Password *

Enter Password

Session Timeout *

1440

- Configure your erwin DI connection parameters as follows:

Field	Description
Configuration Name	Specify a unique name for the configuration
Server Name	Specify the server address, where erwin DI is installed
Application Name	Specify the name of your erwin DI Application
Port	Specify the port on your server that is used for erwin DI

Configuration

Field	Description
Enable SSL	Specify whether you want to connect to the server through a secured connection
Username	Specify your erwin DI user name
Password	Specify your erwin DI password
Session Timeout	Specify erwin DI's session time out duration in minutes

4. Click **Test**.

5. Click **Save**.

Your connection is tested and saved. You can set up multiple erwin DI configurations and use them as required.

Scenario: Schedule Jobs to Export Data Models to erwin DI

An Export to DI job converts a model to erwin DI compatible format and then,

- exports the model to the Metadata Manager
- exports the source and target column data from a dimensional model into the Mapping Manager

Once source and target column data is exported, any updates made to them are not exported when the job runs again.

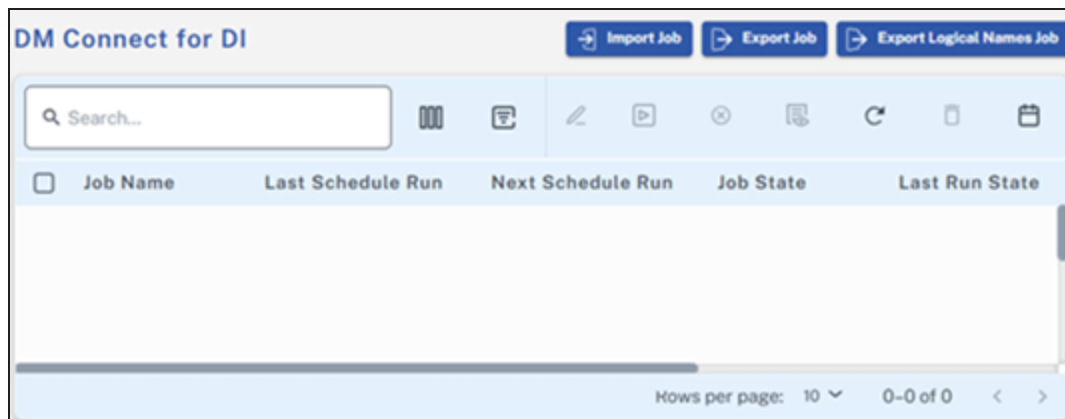
- If the model has an associated NSM file, it exports the file to the Business Glossary Manager

For more information about data sharing between erwin Data Modeler (erwin DM) and erwin Data Intelligence(erwin DI), refer to the [Data Sharing](#) topic.

By default the DM Connect for DI app opens in the Calendar view. You can toggle the page view between the List View (📄) or Calendar View (📅) using the respective buttons on the page toolbar.

To schedule jobs, follow these steps:

1. In the header pane, click  and then click **DM Connect for DI**.
The DM Connect for DI page opens.



Scenario: Schedule Jobs to Export Data Models to erwin DI

2. Click **Export Job**.
The Add Export Job page appears.

Add Export Job ← Back Save

Catalogs

Loaded Catalogs ☐ Include NSM

- ☐ Mart
- ☐ eMovies
- ☐ New Library
- ☐ PublicationSystemSample

DI Information

Connectors

Systems Name

Environment Name

Export Option

Version

Job Information

Job Name

Start Date/Time

Job Interval

Frequency

End Date/Time

Days

☐ Notify Me

Notification Email

CC List

☐ Run Now

3. Set up job parameters as follows:

Tab	Field	Description
Catalogs	Catalog Tree	Select models from mart catalog to export. Before you select models, you can use the All Catalogs or Loaded Catalogs to display all available catalogs or only the expanded catalogs respectively. Apart from that, after you select catalogs, you can click  to view only the selected catalogs in the Catalogs section.
	Include NSM	Select whether naming standards must be exported.

Tab	Field	Description
		A catalog named by the NSM file is created under Business Glossary Manager > DM NSM Files custom asset. Ensure that the DM NSM Files asset is available in the Business Glossary Manager.

Scenario: Schedule Jobs to Export Data Models to erwin DI

Tab	Field	Description
DI Inform- ation	Connectors	Select a configuration to use for the export job.

Tab	Field	Description
	Systems Name	Enter a system name. This corresponds to System in Metadata Manager.
	Environment Name	Use the predefined macros to set the environment name. This corresponds to Environment in Metadata manager. For system and environment names, following special characters are allowed: • System: - (hyphen), _ (underscore), and space • Environment: @ (at sign), \$ (dollar sign), & (ampersand), / (slash mark), - (hyphen), _ (underscore), and space All other special characters are replaced with _ (underscore).
	Export Option	Select a suitable export option: • Add New: • If an environment exists, this option adds any new tables or columns to it. • If an environment does not exist, this option creates an environment and adds tables and columns to it. • Update Existing + Add New: • If the existing model objects have changed, this option exports the updates to the existing model objects in erwin DI . • Also, it exports any new objects in the model to erwin DI . • Update Existing + Add New + Invalidate:

Tab	Field	Description
		Along with the functionality of Update Existing + Add New option, this option invalidates any deleted tables or columns. • Delete & Reload: This option deletes all the tables and columns. Then, it exports them again.
	Version	Select whether a version of an existing environment must be created. This archives the existing environment.

Scenario: Schedule Jobs to Export Data Models to erwin DI

Tab	Field	Description
Job Information	Job Name	Specify a job name.
	Start Date/Time	Select the date and time at which the job must start.
	Job Interval	Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly. You can also set up custom recurrence for jobs.
	Frequency	Select the hourly frequency at which the job should run. This property is available only when you set the Job Interval to Recurring.
	End Date/Time	If you set up recurring jobs, select the date and time at which the recurrence must end.
	Days	Select the days of the week on which the job should run. The days available here depend on the End Date/Time. This property is available only when you set the Job Interval to Recurring.
	Notify Me	Select the check box to receive a notification when the job status changes. This enables the Notification Email and CC List fields.
	Notification Email	Specify the email address at which you want to receive the notification.
	CC List	Specify a semi-colon-separated list of email addresses that must receive the job notification.
	Run Now	Select the check box to run the job immediately.

4. Click **Save**.

The job is added to the calendar with its **Job State** set to Scheduled.

Scenario: Schedule Jobs to Export Data Models to erwin DI

The job runs according to the schedule and exports data model to Metadata Manager and naming standards to Business Glossary Manager.

The screenshot displays the erwin Mart Administrator interface. At the top, a table titled "DM Connect for DI" shows a job named "TechPubsEMovies" that completed successfully on 2020-06-08 at 19:43:39. A callout box labeled "1" points to this job, stating: "Job run on TechPubsModel, TechPubs NSM file attached to the model".

Below the table, the "Metadata Manager" section shows a "System Catalogue" with a tree view containing "Technical_Publications", "TechnicalPublications", "TechPubsEMovies", and "TechPubsModel (v1.00)". A callout box labeled "2" points to "TechPubsModel (v1.00)", stating: "Model exported to Metadata Manager".

The "Business Glossary Manager" section shows a "Catalog View" with a tree view containing "DM NSM Files", "MyMovieList (6)", and "TechPubs (6)". A callout box labeled "3" points to "TechPubs (6)", stating: "TechPubs NSM file exported to Business Glossary Manager".

The "DM NSM FILE Summary" section shows a list of files with columns for "Search", "Items Per Page", "Page 1", "PREVIOUS", and "NEXT". The files listed are "TechPubs CUST" and "TechPubs EMP".

Database connection parameters such as DBMS Name/DSN, IP Address/Host Name, Port, and Business Entity Type (System Environment Type) are stored in environment details.

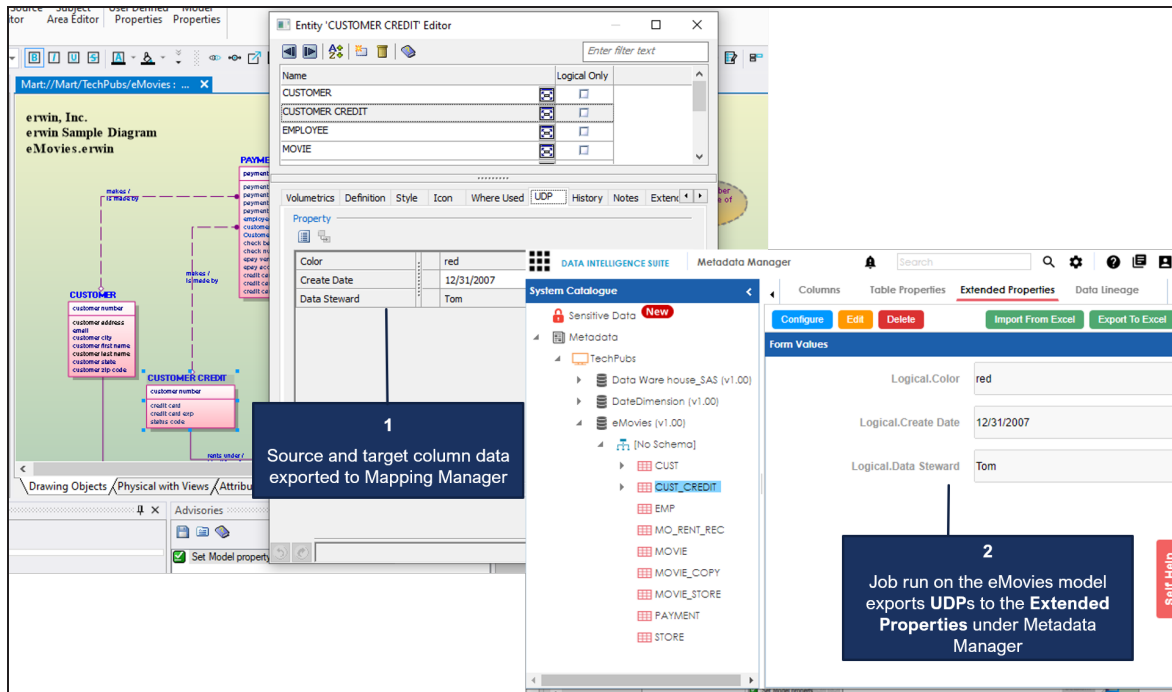
The screenshot displays the "Environment Details" tab in the erwin Mart Administrator interface. The "Workflow Status" section shows the following details:

Field	Value
System Environment Name*	Demo_SQLS2019_REDB_DISV11
System Environment Type	erwin DM Mart - SqlServer
Data Steward	
Server Platform	
Server OS Version	
File Management Type	
File Location	

The "Driver Name*" field is also visible, with a value of "disv11". The "DBMS Name/DSN*" field is "localhost". The "IP Address/Host Name*" field is "localhost". The "Port**" field is empty. The "User Name*" field is empty. The "Password*" field is masked with slashes. The "Uri*" field is masked with slashes.

Also, the UDPs and validation rules in the model are exported to the Extended Properties tab in Metadata Manager.

Scenario: Schedule Jobs to Export Data Models to erwin DI



Case I: Run Job

The Run Job option immediately runs a job. This option works only if the selected job is a recurring job in the scheduled state.

Case II: Modify Job

The Manage Job option lets you modify an existing scheduled job. If you modify a job:

- before its run schedule, the changes take effect when the job runs
- while it is running, the job is cancelled, and changes are saved. They take effect when the job runs next time.
- after it is past its schedule, the job runs according to the new schedule

Case III: Recurring Job-No Change in Models

Recurring jobs run based on the Job Interval you set while scheduling them. If the models selected in the job have not changed between job intervals, the job still runs according to the schedule.

However, no data is exported to erwin DI.

Case IV: New Model in the Folder

If a new model is added to an existing folder on which a recurring job has been scheduled, DM Connect for DI auto-syncs it to the job. The new model is included in the job automatically, when the job runs next.

Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

An Import to DM job imports environments and the underlying tables, columns, and metadata to a mart catalog in the original file format as a model. You can then, connect to your mart via erwin DM and open the saved model. erwin DM automatically converts this model to an erwin model. You can save this model locally or on mart. When you save this model back to the mart, it is saved with the corresponding timestamp.

For more information about data sharing between erwin Data Modeler (erwin DM) and erwin Data Intelligence (erwin DI), refer to the [Data Sharing](#) topic.

By default the DM Connect for DI app opens in the Calendar view. You can toggle the page view between the List View () or Calendar View () using the respective buttons on the page toolbar.

To schedule import to DM jobs, follow these steps:

1. In the header pane, click  and then click **DM Connect for DI**.
The DM Connect for DI page opens.
2. Click a suitable calendar slot or click **Import Job**.
3. Click **Import to DM**.

Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

The Add Import Job page appears.

Add Import Job

Back

DI Information

Connectors

Systems Name

Environment Name

Library

Mart

New Library

Job Information

Job Name

Enter Job Name

Start Date/Time

08/27/2024 06:31 PM

Job Interval

Frequency

End Date/Time

08/28/2024

Days

Notify Me

Notification Email

Email

CC List

Email

Run Now

DM Connect for DI Guide 15.0 | 34

Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

4. Set up job parameters as follows:

Tab	Field	Description
DI Inform- ation	Connectors	Select a configuration to use for the import job.
	Systems Name	Select a system from the list of available systems based on your DI configuration
	Environment Name	Select one or more environments from the list of available environments based on the selected system.
Library	Select Models	Select the mart catalog/library to import models to.

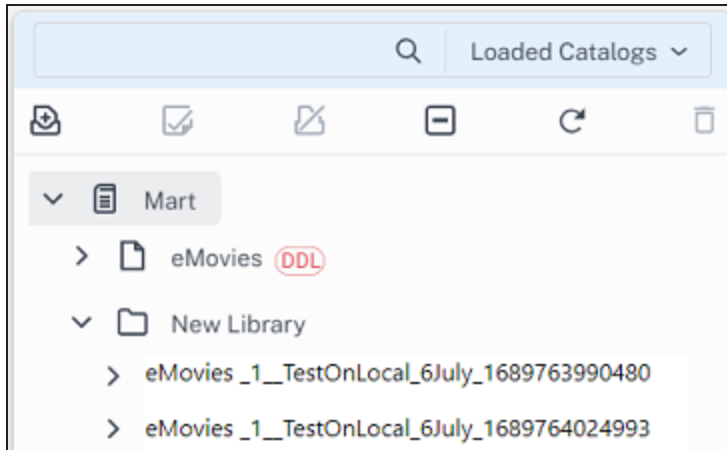
Tab	Field	Description
Job Information	Job Name	Specify a job name.
	Start Date/Time	Select the date and time at which the job must run.
	Job Interval	Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly. You can also set up custom recurrence for jobs.
	Frequency	Select the hourly frequency at which the job should run. This property is available only when you set the Job Interval to Recurring.
	End Date/Time	If you set up recurring jobs, select the date and time at which the recurrence must end.
	Days	Select the days of the week on which the job should run. The days available here depend on the End Date/Time. This property is available only when you set the Job Interval to Recurring.
	Notify Me	Select whether a notification is sent to you when the job status changes. This enables the Notification Email and CC List fields.
	Notification Email	Specify the email address at which you want to receive the notification.
	CC List	Specify a semi-colon-separated list of email addresses that must receive the job notification.
	Run Now	Select the check box to run the job immediately.

- Click **Save**.

The job is added to the calendar with its **Job State** set to Scheduled.

Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

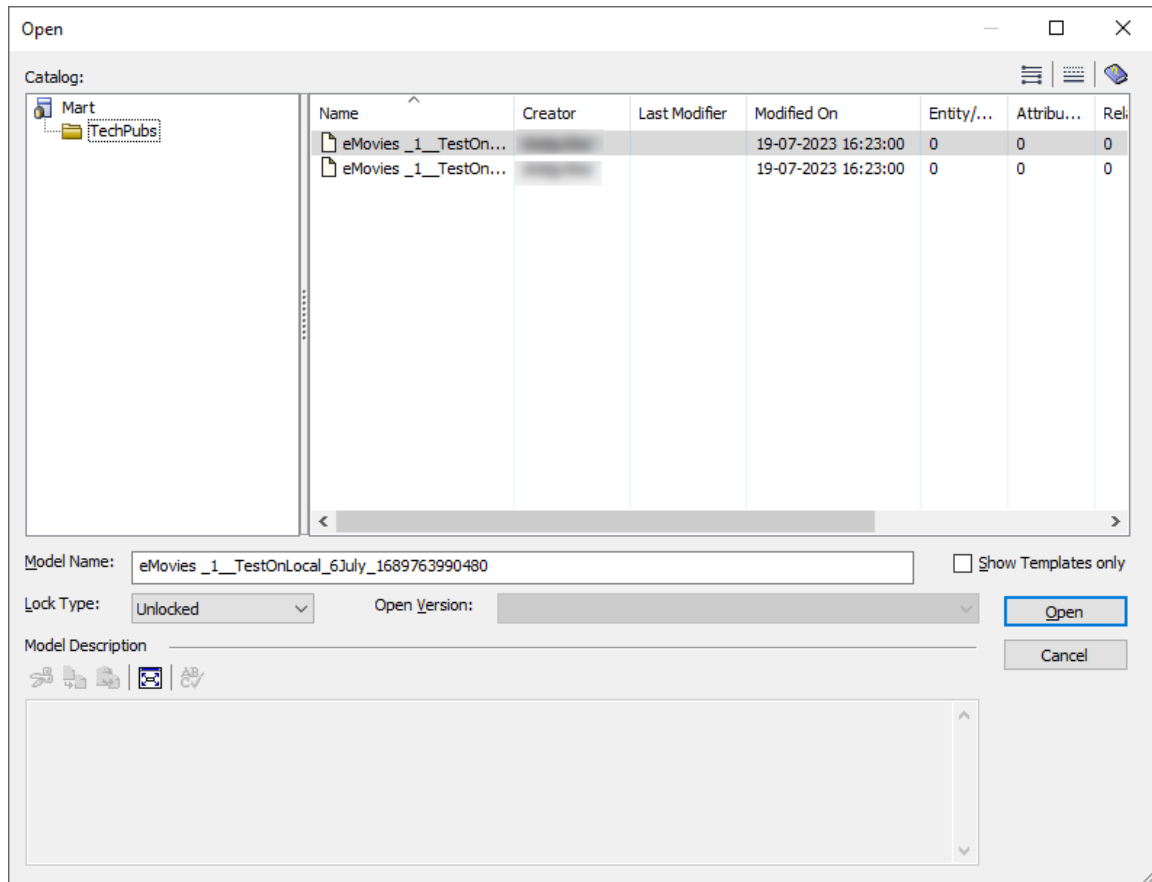
On successful job completion, the imported model is added to the selected library in the original erwin DI format. To use this model, you must convert it to erwin DM format.



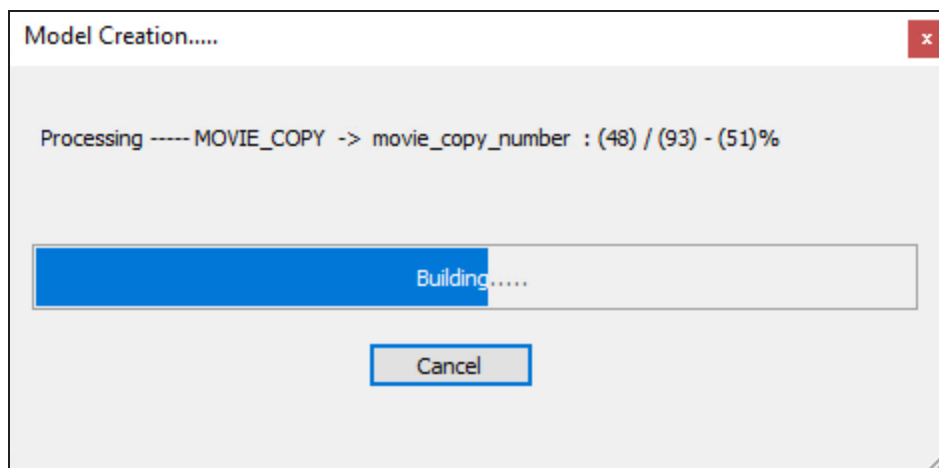
To convert an imported model to erwin DM format, follow these steps:

1. Start erwin DM and connect to your mart.
2. On the ribbon, click **Mart** > **Open**.

Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

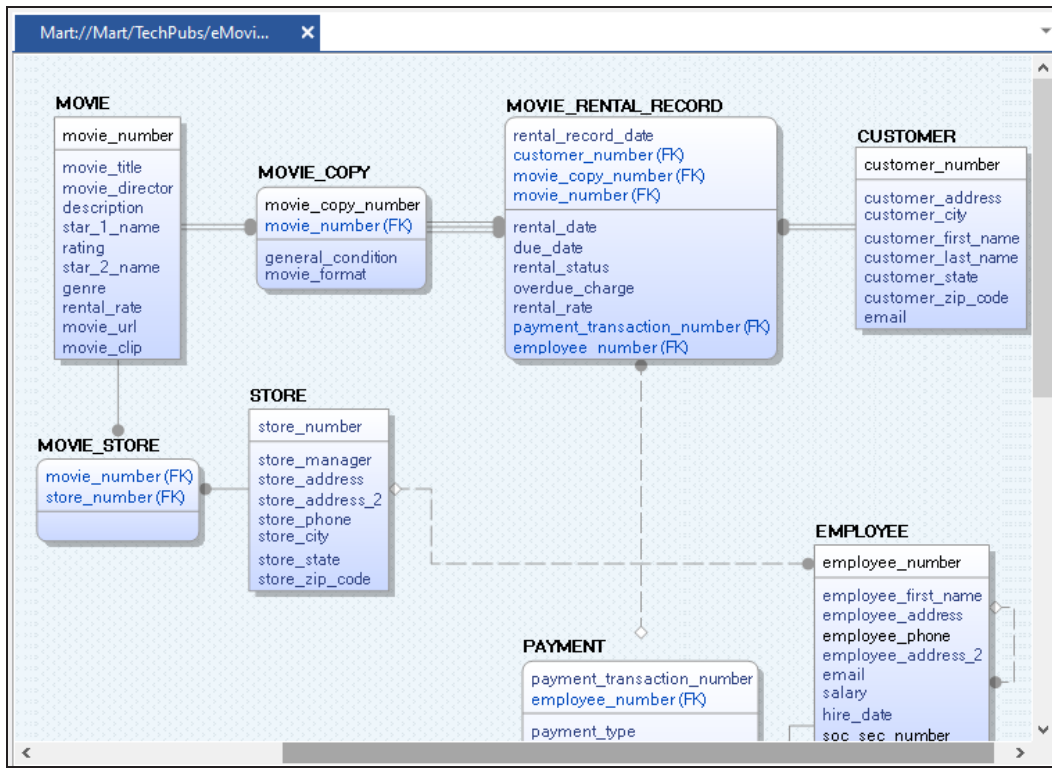


3. Select the required model and click **Open**.
The process to convert the imported model to the erwin DM format runs.

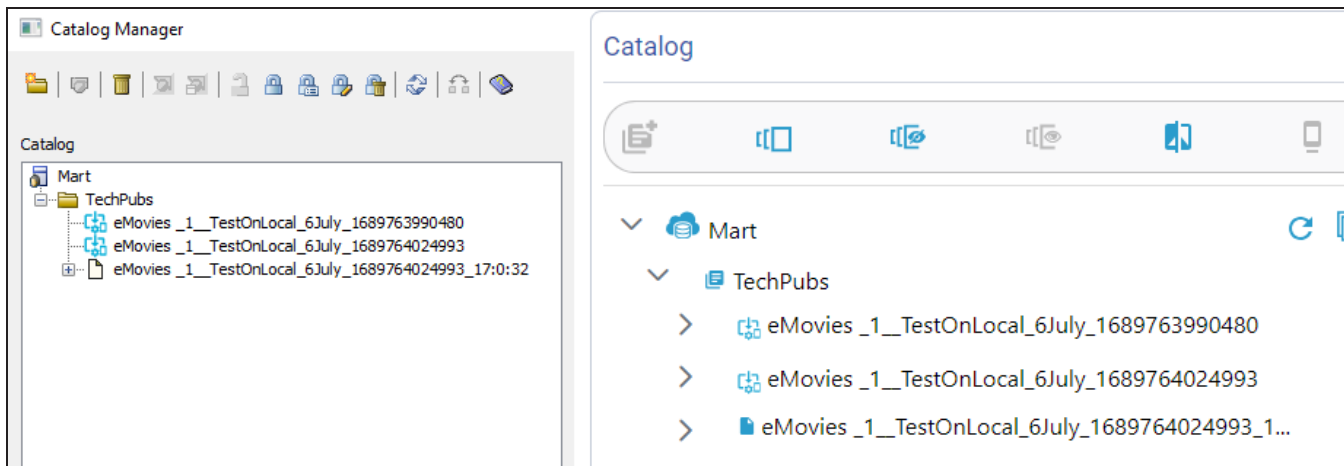


Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

Once this process is complete, the model is converted to .erwin format and opened in the diagram editor.



This model is saved to your mart catalog in the .erwin format with a time stamp. The following image shows the saved model in the Catalog Manager and in your mart library.



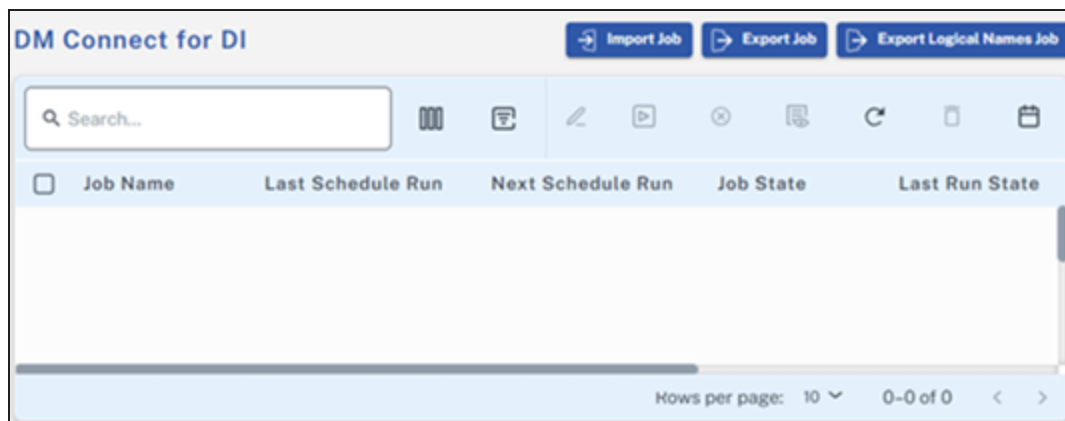
Scenario: Export Logical Names from erwin DM to erwin DI

An Export BGM job converts logical names to an erwin DI-compatible format and exports them to the Business Glossary Manager as Business Terms.

For more information about data sharing between erwin Data Modeler (erwin DM) and erwin Data Intelligence(erwin DI), refer to the [Data Sharing](#) topic.

To schedule logical name export jobs, follow these steps:

1. In the header pane, click  and then click **DM Connect for DI**.
The DM Connect for DI page opens.



2. Click **Export Logical Names Job**.
The Add Export BGM Job page appears.

Add Export BGM Job

Catalogs

Loaded Catalogs ☐ Include NSM

- ☐ Mart
- ☐ eMovies
- ☐ TechPubs_1750153922646_15

DI Information

Connectors

Job Information

Job Name
Enter Job Name

Start Date/Time
06/17/2025 05:42 PM

Job Interval

Frequency
End Date/Time
06/18/2025

Days

☐ Notify Me

Notification Email
Email

CC List
Email

☐ Run Now

3. Set up job parameters as follows:

Tab	Field	Description
Catalogs	Catalog Tree	Select models from catalog to export. Before you select models, you can use the All Catalogs or Loaded Catalogs to display all available catalogs or only the expanded catalogs respectively. Apart from that, after you select catalogs, you can click  to view only the selected catalogs in the Catalogs section.
	Include NSM	Select whether naming standards must be exported. A catalog named by NSM file is created under Business Glossary Manager > DM NSM Files custom

Scenario: Export Logical Names from erwin DM to erwin DI

Tab	Field	Description
		asset. Ensure that the DM NSM Files asset is available in the Business Glossary Manager.
DI Information	Connectors	Select a configuration to use for the export job.

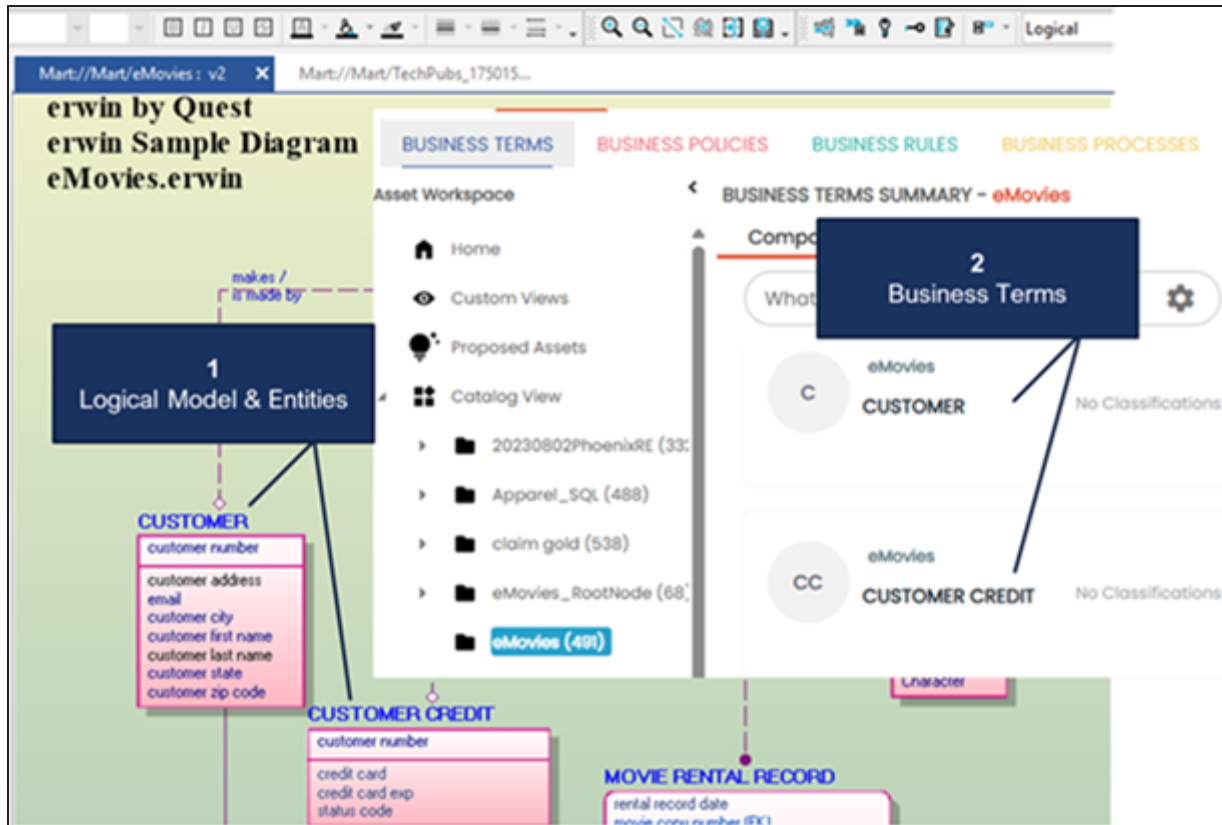
Tab	Field	Description
Job Information	Job Name	Specify a job name.
	Start Date/Time	Select the date and time at which the job must start.
	Job Interval	Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly. You can also set up custom recurrence for jobs.
	Frequency	Select the hourly frequency at which the job should run. This property is available only when you set the Job Interval to Recurring.
	End Date/Time	If you set up recurring jobs, select the date and time at which the recurrence must end.
	Days	Select the days of the week on which the job should run. The days available here depend on the End Date/Time. This property is available only when you set the Job Interval to Recurring.
	Notify Me	Select the check box to receive a notification when the job status changes. This enables the Notification Email and CC List fields.
	Notification Email	Specify the email address at which you want to receive the notification.
	CC List	Specify a semi-colon-separated list of email addresses that must receive the job notification.
	Run Now	Select the check box to run the job immediately.

4. Click **Save**.

The job is added to the calendar with its **Job State** set to Scheduled.

Scenario: Export Logical Names from erwin DM to erwin DI

The job runs according to the schedule and exports logical names to Business Glossary Manager. For example, the logical names, Customer and Customer Credit, from the eMovies model are saved as business terms in the Business Glossary Manager.



Scenario: Sync Business Glossary

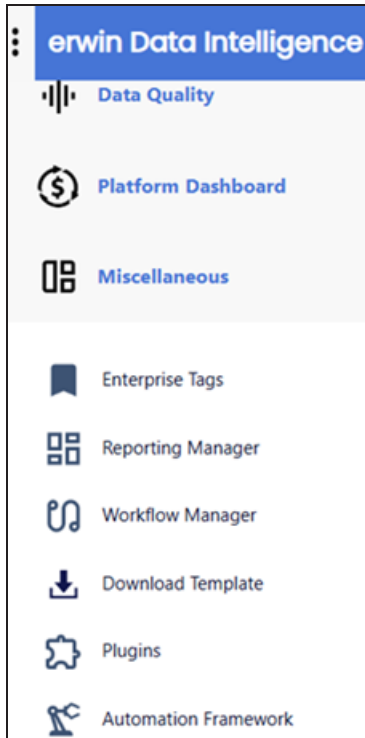
The DI-DM Mart Bridge connector syncs glossaries between erwin Data Modeler (erwin DM) and erwin Data Intelligence (erwin DI) via erwin Mart Portal. Basically, glossaries in erwin DM models are pushed to erwin DI under the business glossary manager via DM Connect for DI. You can then use the DI-DM Mart Bridge connector to harvest any updates made to these glossaries under Enterprise Glossary in erwin Mart Portal.

Prerequisites

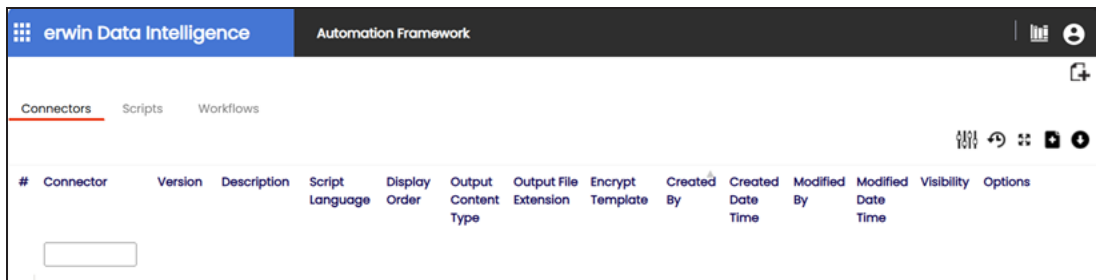
Ensure that you have the connector file, `DI_DM_Mart_Bridge_Connector.acp`, to sync the business glossaries. To procure this connector file, reach out to us through the Sales team, Support team, Professional Services, or the PM team.

Downloading and Importing Connector

1. Download the connector file named `DI_DM_Mart_Bridge_Connector.acp`.
2. Log in to erwin DI.
3. Go to Miscellaneous and click **Automation Framework**.

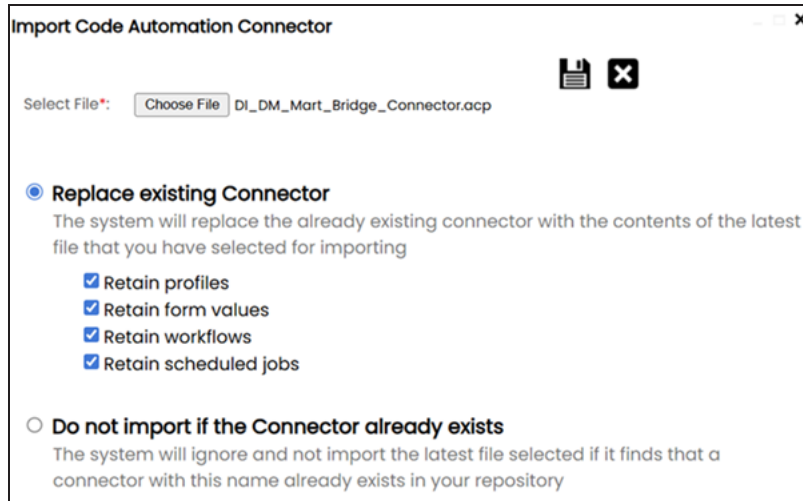


The Automation Framework page appears.



4. On the Connectors tab, click .

This opens the Import Code Automation Connector page.



The dialog box titled "Import Code Automation Connector" has a "Select File*" section with a "Choose File" button and the filename "DI_DM_Mart_Bridge_Connector.acp". Below this, there are two radio button options. The first option, "Replace existing Connector", is selected and includes a description: "The system will replace the already existing connector with the contents of the latest file that you have selected for importing". It has four checked checkboxes: "Retain profiles", "Retain form values", "Retain workflows", and "Retain scheduled jobs". The second option, "Do not import if the Connector already exists", is unselected and includes a description: "The system will ignore and not import the latest file selected if it finds that a connector with this name already exists in your repository".

5. Click **Choose File**.

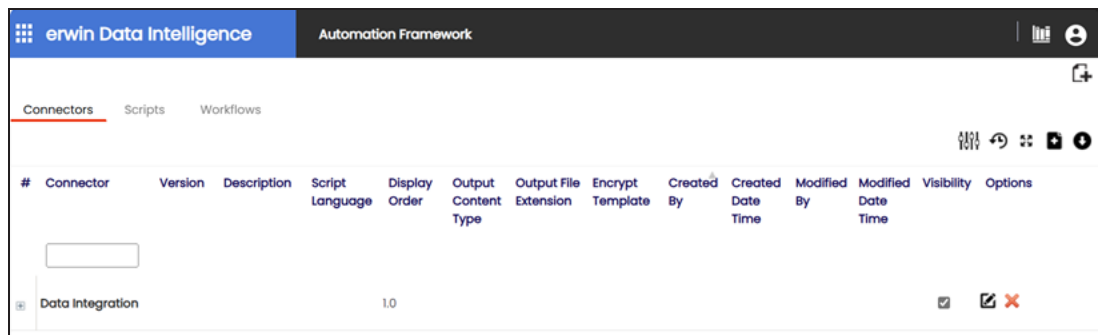
6. Select the downloaded connector file and click **Open**.

7. On the Import Code Automation Connector page, click .

The success message appears for the imported file and the connector gets added.

8. Refresh the page after the file is successfully imported.

The newly added connector is displayed.

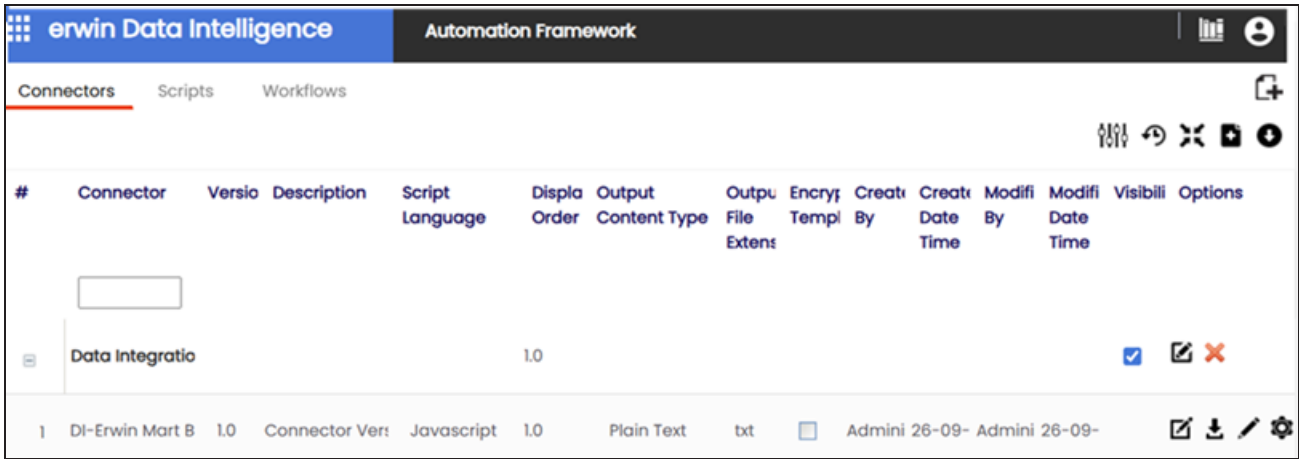


The screenshot shows the "erwin Data Intelligence" interface with the "Automation Framework" tab selected. The "Connectors" sub-tab is active, displaying a table of connectors. The table has columns for #, Connector, Version, Description, Script Language, Display Order, Output Content Type, Output File Extension, Encrypt Template, Created By, Created Date Time, Modified By, Modified Date Time, Visibility, and Options. A single connector, "Data Integration", is listed with version "1.0". The "Options" column for this connector shows a checkmark, a pencil icon, and a red X icon.

#	Connector	Version	Description	Script Language	Display Order	Output Content Type	Output File Extension	Encrypt Template	Created By	Created Date Time	Modified By	Modified Date Time	Visibility	Options
1	Data Integration	1.0												☒  

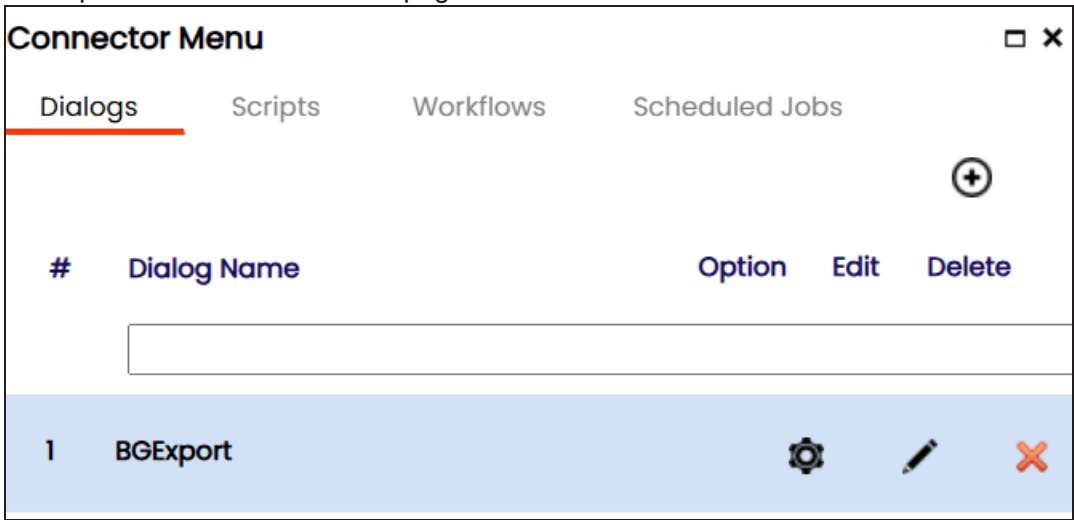
9. Expand Data Integration to view the added connector.

Scenario: Sync Business Glossary



10. Select the connector and click .

This opens the Connector Menu page.



11. On the Dialogs tab, click .

This opens the Connector Options Form.

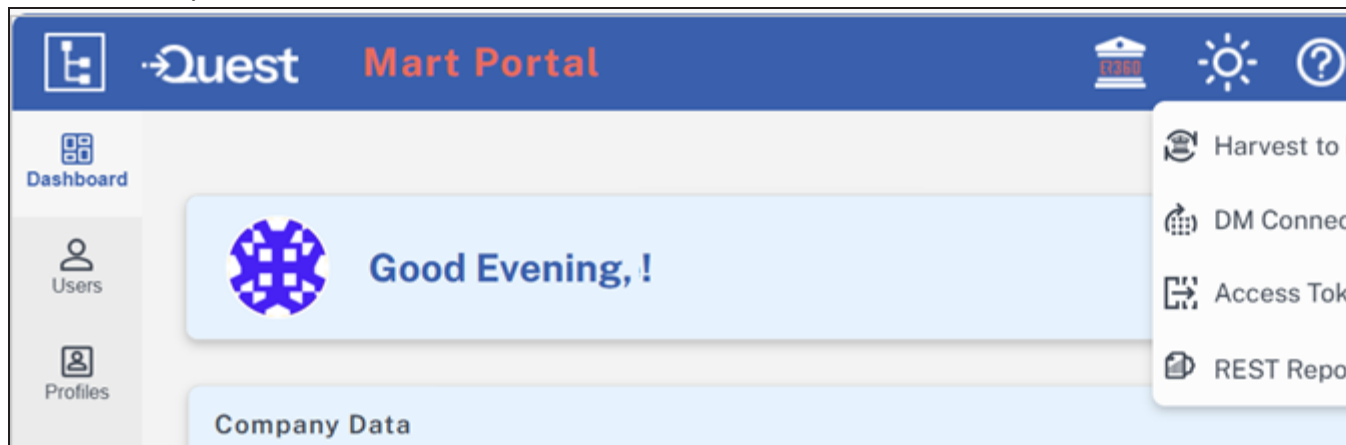
The image shows a 'Connector Options Form' for a 'Script' named 'DefaultTab'. The form includes the following fields and options:

- Mode Of Run:** Radio buttons for 'Manual' (selected) and 'Schedule'.
- Asset Names(Please Give Multiple Name):** A text input field.
- BusinessGlossaryReportExportOption:** Radio buttons for 'Migrate All' (selected), 'Assets Level', and 'Catalog Level'.
- Assets Type:** A dropdown menu.
- Assets Catalog Name:** A dropdown menu with a close icon (X).
- DIS Username:** A text input field with masked characters (dots).
- DIS Password:** A text input field with masked characters (dots).
- Mart End Point:** A text input field containing 'http://172.20.0.8:18170//MartJobSc'.
- Bearer Token:** A text input field with masked characters (dots).

At the bottom, there is a green text prompt: 'Drag Component Here or Double Click to add to form designer'. To the right of the form is a 'Profiles' panel showing a 'Default' profile and a grid of component icons.

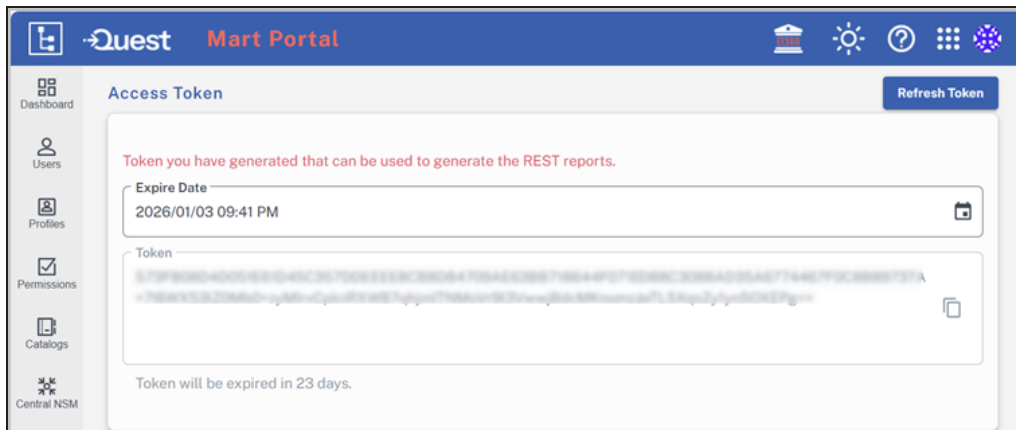
Configuring DM-DI Mart Bridge

1. Open erwin Mart Portal.
2. On the header pane, click  and then click **Access Token**.



Scenario: Sync Business Glossary

This opens the Access Token page. The generated token is displayed in the Token field.

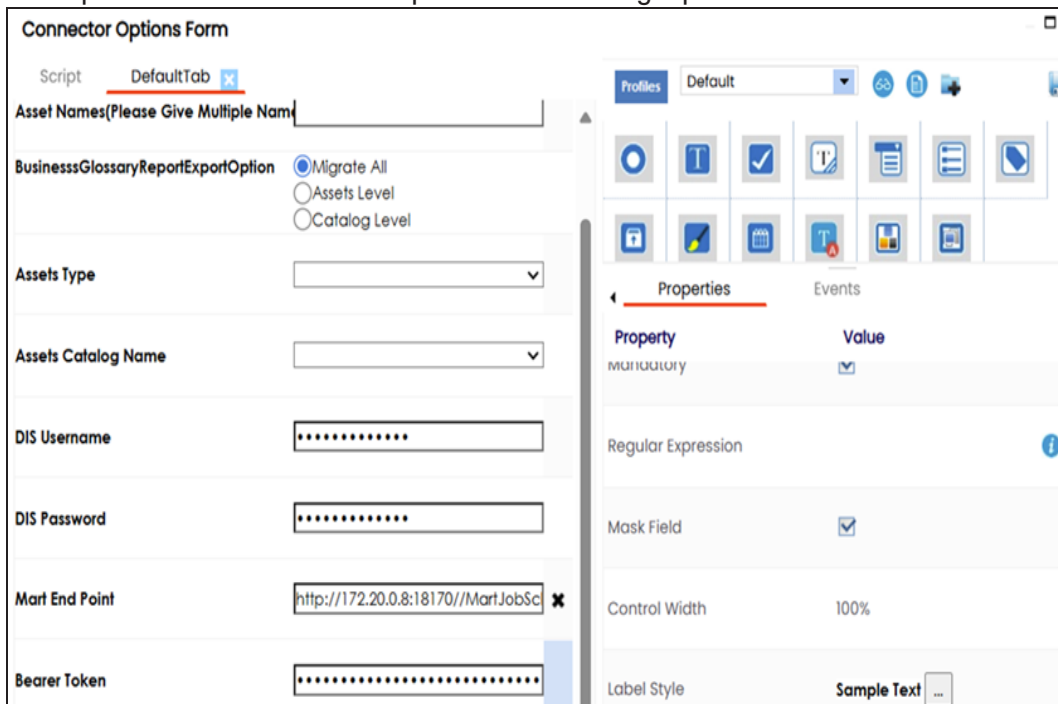


The screenshot shows the 'Access Token' page in the Quest Mart Portal. The page has a blue header with the Quest logo and 'Mart Portal' text. A sidebar on the left contains navigation icons for Dashboard, Users, Profiles, Permissions, Catalogs, and Central NSM. The main content area is titled 'Access Token' and includes a 'Refresh Token' button. Below the title, there is a message: 'Token you have generated that can be used to generate the REST reports.' The 'Expire Date' is shown as '2026/01/03 09:41 PM'. The 'Token' field contains a long alphanumeric string. A note at the bottom states 'Token will be expired in 23 days.'

Access Token must be validated.

3. Copy the token once it gets created.
4. Go back to erwin DI.
5. In the Connector Options Form, select the **Bearer Token** option under DefaultTab.

This opens the Bearer Token Properties tab in the right pane.



The screenshot shows the 'Connector Options Form' with the 'DefaultTab' selected. The form includes fields for 'Asset Names', 'BusinessGlossaryReportExportOption' (with radio buttons for 'Migrate All', 'Assets Level', and 'Catalog Level'), 'Assets Type', 'Assets Catalog Name', 'DIS Username', 'DIS Password', 'Mart End Point', and 'Bearer Token'. The 'Bearer Token' field is highlighted. On the right side, there is a 'Properties' pane with a 'Default' profile selected. The 'Properties' pane shows a table with 'Property' and 'Value' columns. The 'Property' column lists 'mandatory', 'Regular Expression', 'Mask Field', 'Control Width', and 'Label Style'. The 'Value' column shows 'true', an information icon, 'true', '100%', and 'Sample Text'.

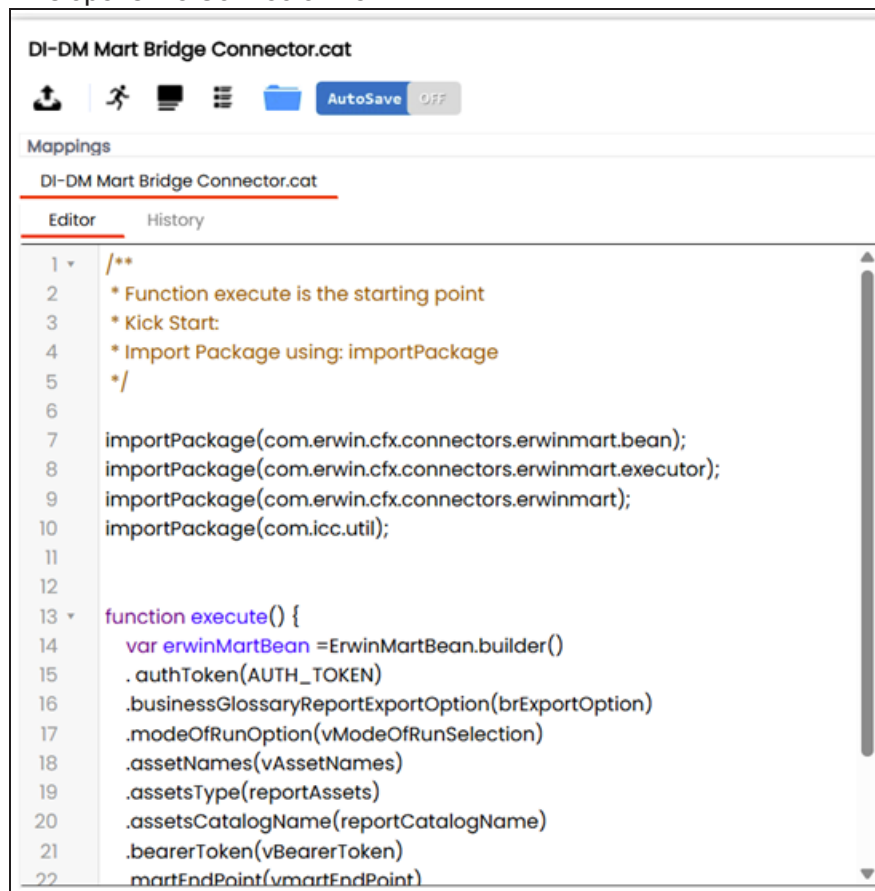
Scenario: Sync Business Glossary

6. Deselect the **Mask Field** checkbox to view the token.
7. In the left pane, select the complete token from the Bearer Token field and paste the copied access token there.
8. Verify that the port number in the Mart End Point field matches the port number specified in the erwin Mart Portal URL. For example, port number, http/https.
9. Click **Save** to save all the changes and close the form.

Harvesting Glossary to erwin Mart Portal

1. On the Automation Framework page, double-click the connector.

This opens the Connector file.



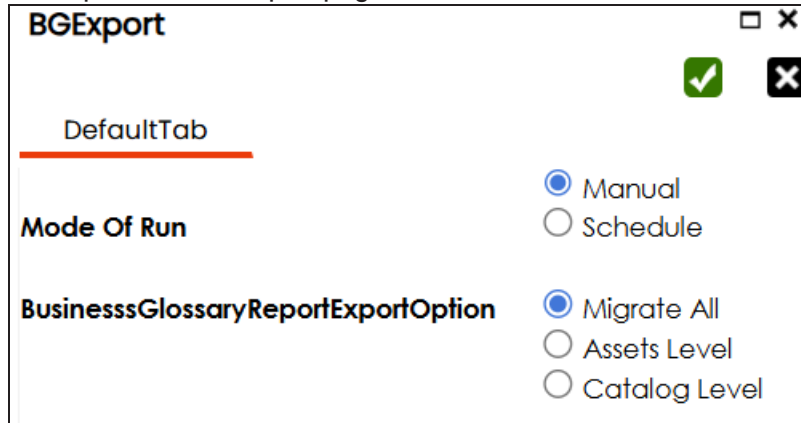
```
DI-DM Mart Bridge Connector.cat

Mappings
DI-DM Mart Bridge Connector.cat
Editor History
1 /**
2  * Function execute is the starting point
3  * Kick Start:
4  * Import Package using: importPackage
5  */
6
7 importPackage(com.erwin.cfx.connectors.erwinmart.bean);
8 importPackage(com.erwin.cfx.connectors.erwinmart.executor);
9 importPackage(com.erwin.cfx.connectors.erwinmart);
10 importPackage(com.icc.util);
11
12
13 function execute() {
14     var erwinMartBean =ErwinMartBean.builder()
15     . authToken(AUTH_TOKEN)
16     .businessGlossaryReportExportOption(brExportOption)
17     .modeOfRunOption(vModeOfRunSelection)
18     .assetNames(vAssetNames)
19     .assetsType(reportAssets)
20     .assetsCatalogName(reportCatalogName)
21     .bearerToken(vBearerToken)
22     martEndPoint(vmartEndPoint)
```

2. Click .

Scenario: Sync Business Glossary

This opens the BGExport page.



The screenshot shows a window titled "BGExport" with a standard Windows title bar (minimize, maximize, close buttons). Inside the window, there is a tab labeled "DefaultTab" which is underlined in red. Below the tab, there are two sections of configuration options:

- Mode Of Run**: Two radio buttons are present. The first is labeled "Manual" and is selected (indicated by a blue dot). The second is labeled "Schedule" and is not selected.
- BusinesssGlossaryReportExportOption**: Three radio buttons are present. The first is labeled "Migrate All" and is selected (indicated by a blue dot). The second is labeled "Assets Level" and is not selected. The third is labeled "Catalog Level" and is not selected.

There are also two small icons in the top right corner of the window: a green checkmark and a black 'X'.

3. Select Catalog Level from the BusinessGlossaryReportExportOption and keep the Mode of Run as Manual to get a glossary.

Avoid the Migrate All option as erwin Mart Portal only supports Business Terms. This must be followed if the catalog contains assets other than Business Terms (For example, Business Policies, Business Rules).

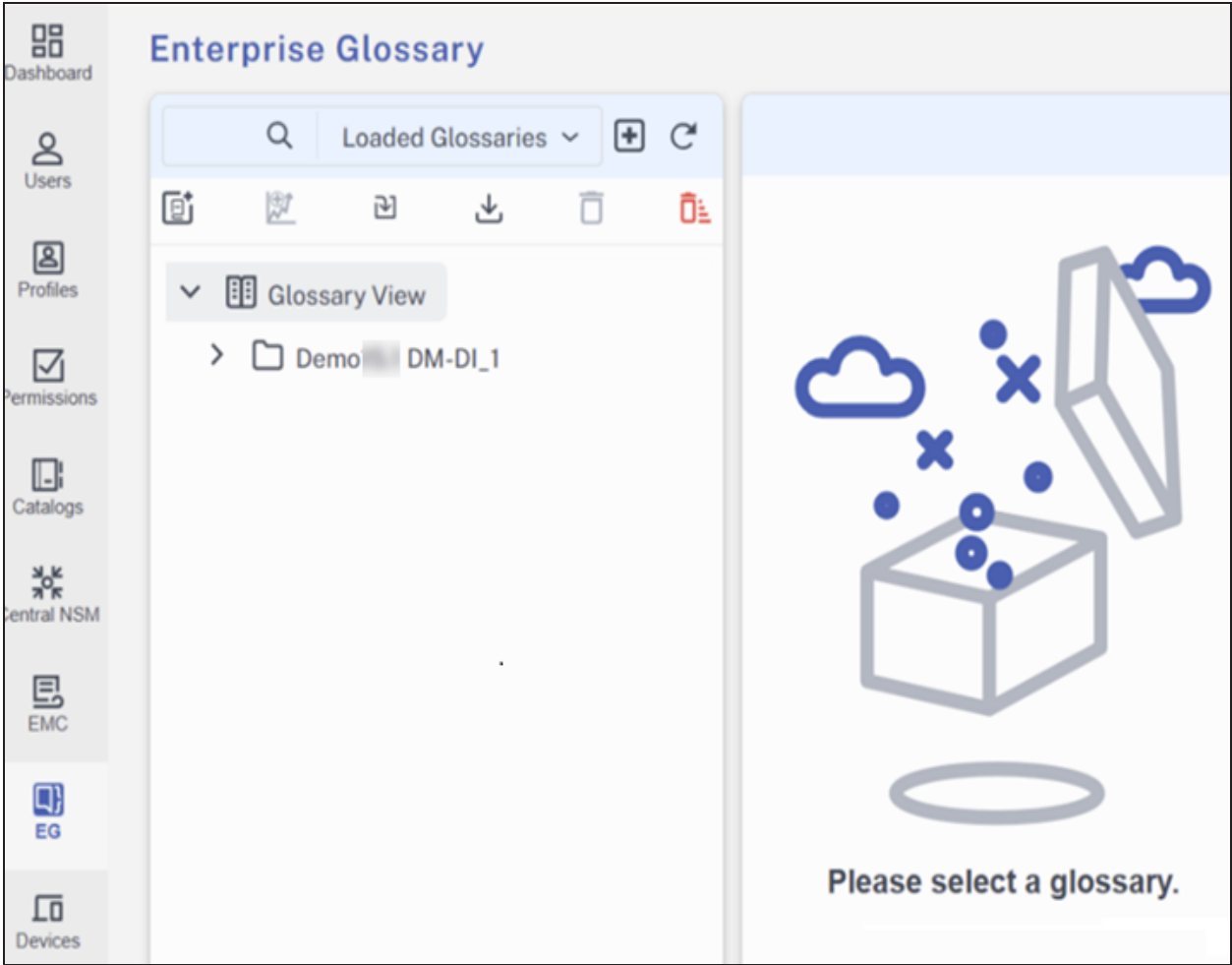
4. Select Asset type and Asset Catalog Name based on your requirements. For example, in this case, we selected Asset Type as Business Terms and Asset Catalog Name as Demo15.1 DM-DI_1.

The screenshot shows the BGExport application window. It has a title bar with a green checkmark icon and a close button. The window contains several sections:

- DefaultTab**: A tab labeled "DefaultTab" with a red underline.
- Mode Of Run**: Two radio buttons, "Manual" (selected) and "Schedule".
- BusinessGlossaryReportExportOption**: Three radio buttons, "Migrate All", "Assets Level", and "Catalog Level" (selected).
- Assets Type**: A dropdown menu with "Business Terms" selected.
- Assets Catalog Name**: A dropdown menu with "-----SELECT REPORT CATALOG NAME-----" selected. The dropdown list is open, showing the following options: "TEST DI CAT", "Claim Gold_120", "Pharmaceuticals", "eMovies_June5", "eMovies_CAT", and "Demo15.1 DM-DL_1" (highlighted in blue).

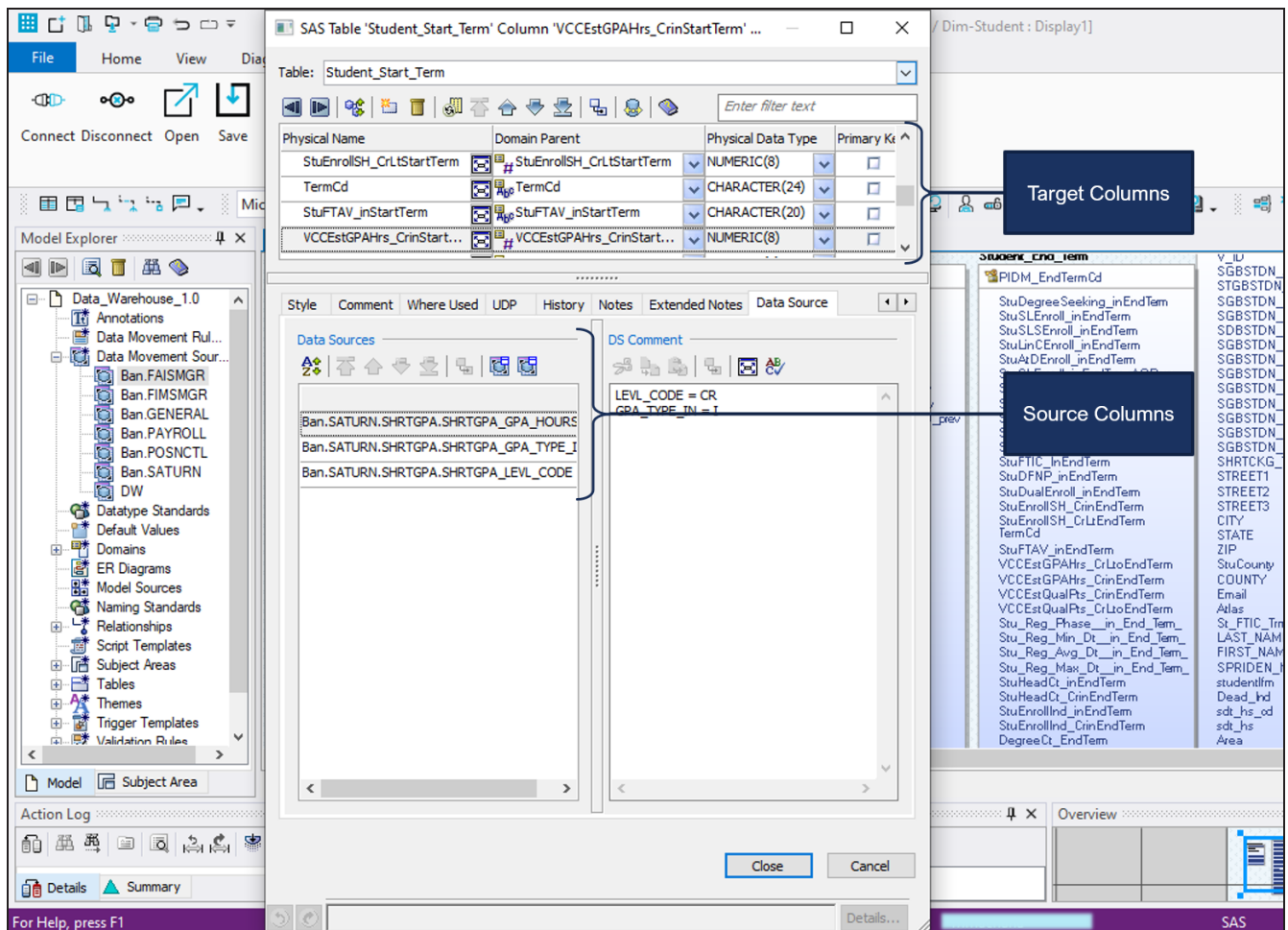
Ensure that the selected catalog exists in erwin DI.

5. Click .
6. Go back to erwin Mart Portal and open the Enterprise Glossary.
7. In the left pane, expand Glossary View to view the imported glossary folder.



Scenario: Import Source and Target Data into Mapping Manager

In case of dimensional model that has associated data sources, DM Connect for DI exports the source and target column data from the model into the Mapping Manager.



Schedule a job on your dimensional model. Once the job is completed successfully, DM Connect for DI creates a project. Under this project, it creates a mapping specification with the source and target column data from your model.

Scenario: Import Source and Target Data into Mapping Manager

erwin

erwin Mart Administrator

DM Connect for DI

Add Job

Delete Job

Manage Job

Cancel Job

Refresh Job

View Log

Run Job

Job Name	Last Scheduled Run	Next Scheduled Run	Job State	Last Run Job Status	Modified By	Modified On
TechnicalPublications	2020-06-08 20:13:16		Completed	Success	mmacharla	2020-06-08 20:11:50
☒ DimensionalModel	2020-06-08 19:43:39	2020-06-08 09:15:00	Scheduled	Success	mmacharla	2020-06-08 19:42:59

1

Job run on a Dimensional model, with associated Data Sources

Workspace Mappings

Mappings

Transformations

Projects

Data_Ware_house_SAS_1__prc

Transformations

Test Cases

Mappings

Data_Ware_house_SAS_1__prc

MappingTargets

2

Source and target column data exported to Mapping Manager

Mapping Specification

Graphical Designer

Test Specification

Workflow Log

[Data_Ware_house_SAS_1__prc]

Profiles: Default

#

Source System Name

Source Environment Name

Source Table Name

Source Column Name

Source Column Data Type

Source Column Length

Business Rule

1

OPROD

ban-prod.valenciacc.t

SGBSTDN

SGBSTDN_ADMT_C

VARCHAR2(2)

2

OPROD

ban-prod.valenciacc.t

SGBSTDN

SGBSTDN_EXP_GR

DATE

3

OPROD

ban-prod.valenciacc.t

SGBSTDN

SGBSTDN_SECD_R

VARCHAR2(1)

Records from 1 to 100

Page 1

100 rows per page

Scenario: NSM Files

If the models selected in a job have NSM files associated with them, DM connect for DI exports them to the Business Glossary Manager under the custom asset, DM NSM Files.

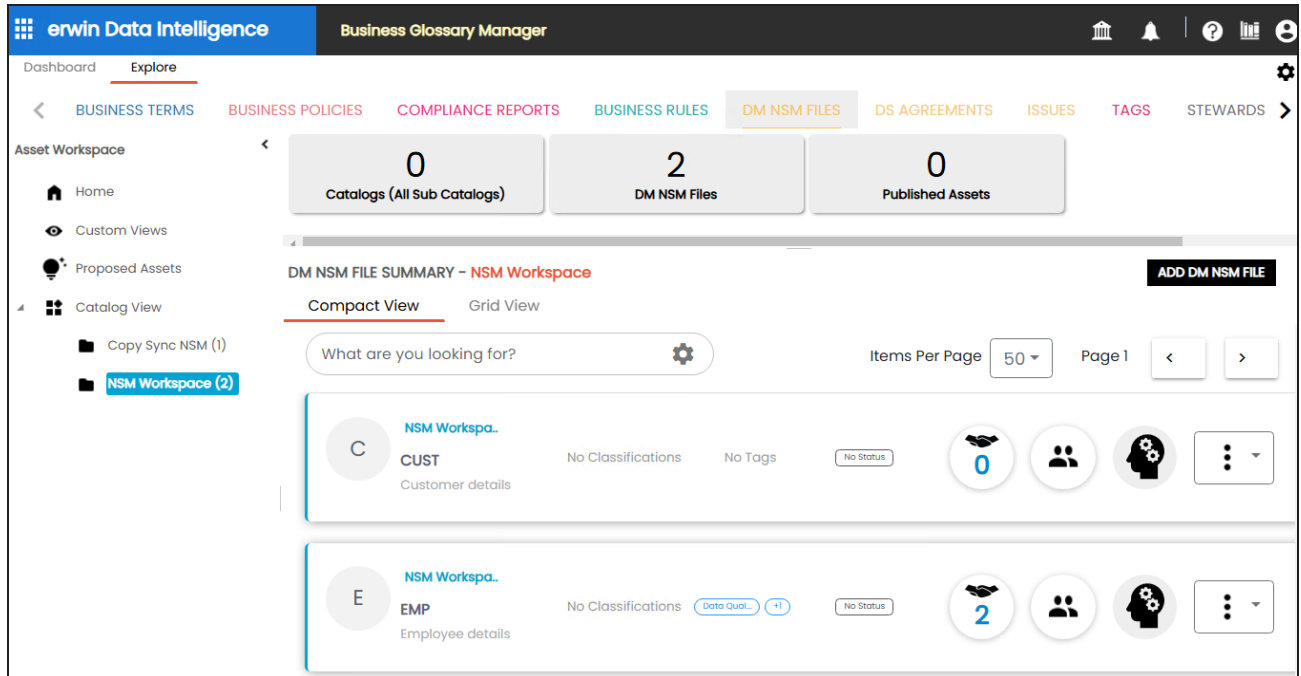
Ensure that the erwin DM NSM asset is enabled under erwin DI's **Application Menu > Settings > Business Glossary Manager & Data Marketplace**.

The screenshot shows the 'erwin Data Intelligence' interface with the 'Business Glossary Manager & Data Marketplace Settings' window open. The 'ASSET TYPES' tab is selected, displaying a list of business assets on the left and configuration details for the 'erwin DM NSM' asset on the right. The 'erwin DM NSM' asset is highlighted with a red box. A blue callout box points to the 'Enable Asset' checkbox, which is currently unchecked.

ASSET TYPES	ASSOCIATIONS & RELATIONSHIPS	OTHER CONFIGURATIONS
Business Assets	Asset Details	Catalog
BT Business Terms	Name *	erwin DM NSM
T Test	Title *	DM NSM Asset
BP Business Policies	Description	To Share and reuse model objects within an organization, erwin DM uses Naming Standards for logical and physical objects in the model so that everyone in your organization uses the names consistently and correctly. The entries in this list are used to expand the abbreviated (cryptic) table/column names to Expanded Logical Name in Metadata Manager.
CR Compliance Reports	Color	#F6C65B
BR Business Rules	Documents Required	☐
ED erwin DM NSM	Enable Asset	☐ Select the Enable Asset option.
DN DM NSM Files	Enable Definition	☒
DA DS Agreements	Enable Sensitivity Fields	☐
I Issues	Enable Scoring	☐
T Tags	Enable Dashboard	☒
	Display Order	6.0

The NSM assets are available under the DM NSM Files tab on the Business Glossary Manager. The screenshot below displays the synced NSM files added as catalogs from erwin DM.

Scenario: NSM Files



Case I: One NSM File, Multiple Models

In a job, if a single NSM file is associated with multiple models, a single catalog is created for both models. The contents of the corresponding catalog under the erwin DM NSM asset type in Business Glossary Manager are overwritten.

Case II: Multiple NSM Files, Multiple Models

In a job, if multiple NSM files are associated with multiple models, multiple catalogs, corresponding to the NSM files are created under the erwin DM NSM asset type in Business Glossary Manager.

Scenario: View Logs

After a job runs, you can view its log to understand more about the job status. In case of failures, you can then troubleshoot using the logs.

To view a job's log, select a job and click **View Log**.

The screenshot shows the 'DM Connect for DI' web application. At the top, there's a navigation bar with the title 'DM Connect for DI' and several icons. Below this is a table with columns: JobName, Last Schedule Run, Next Schedule Run, Job State, Last Run Job Status, and Modified By. The first row is selected, showing 'REDB_SQS2019_DISV11' with a 'Scheduled' state and 'Success' status. A blue 'View Logs' button is visible next to the selected job. A callout box with an arrow points to this button, containing the text: 'Select a job and click here to view its log'. Below the table, the log content is displayed, showing a series of timestamps and log messages for the job execution.

JobName	Last Schedule Run	Next Schedule Run	Job State	Last Run Job Status	Modified By
REDB_SQS2019_DISV11	2022-01-25 18:50:51	2022-01-27 18:50:00	Scheduled	Success	

View Logs

[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : Start Job Execution
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : DisplayJobBean.getId()
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : Start Create/Get SystemName : Demo
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : End(Success) Create/Get SystemName: Demo
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : 65558=> Start Export
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : DisplayJobBean.getId()
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : 65558=> Preparing data for model export
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : 65558=> Evaluated Environment Name ::Demo_SQS2019_REDB_DISV11, modelName::SQS2019_REDB_DISV11, ownerName::Mart/SQS2019_REDB_DISV11
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : 65558=> Start Report File Generation
[25/01/22 06:50:42:042 IST] 12_REDB_SQS2019_DISV11 : Entering Query ReportAPI

Reference: Data Sharing between erwin DM and erwin DI

For data to be shared between erwin Data Modeler and erwin DI, the attributes and properties of objects in both the applications must correspond to each other. Refer to the following tables to understand how erwin DM Connect for DI maps data between applications.

LIBRARY-SYSTEM	
erwin Data Modeler	erwin DI
Library/Catalog Name	System Name
Description	Business Purpose

MODEL-ENVIRONMENT	
erwin Data Modeler	erwin DI
Model Name	System Environment Name
Model Type	System Environment Type
Version	Version
Description	Intended Use Description

TABLE-TABLE	
erwin Data Modeler	erwin DI
Model Name	Environment Name
Library Name	System Name
Entity Name	Logical Table Name
Comment	Table Comments

TABLE-TABLE	
erwin Data Modeler	erwin DI
Schema_Name	Schema

COLUMN-COLUMN	
erwin Data Modeler	erwin DI
Domain Parent	Data Domain
Physical Data Type	Data Type, Precision, Length, Scale
Null Option	Nullable Flag
Foreign Key	Foreign Key Flag
Primary Key	Primary Key Flag
Child Column Name	Foreign Key Column Name
Child Table Name	Foreign Key Table Name

UDP-EXTENDED PROPERTIES	
erwin Data Modeler	erwin DI
UDP Name	Key Name
Value	Value
Description	Description

NSM-DM NSM FILES	
erwin Data Modeler	erwin DI
NSM File Name	Catalog Name

NSM-DM NSM FILES	
erwin Data Modeler	erwin DI
Abbreviation	Asset Name
Glossary Word	Definition

NSM files have multiple parameters. However, DM Connect for DI is configured to push only the Glossary Word and Abbreviation to erwin DI.

LOGICAL NAMES-BUSINESS TERMS	
erwin Data Modeler	erwin DI
Logical Tables/Columns	Business Terms
Table/Column Definitions	Business Term Definitions

DATA MOVEMENT SOURCE-MAPPING	
erwin Data Modeler	erwin DI
Data Source DBMS Type	Database Type
DS Transformations	Business Rule
Library	Target System
Model	Target Environment
Table	Target Table
Column	Target Column
Datatype and Length	Target Column Datatype and length
Source Library (Or Data Source Name)	Source System
Source Model (Or Data Source Server)	Source Environment
Source Table (Or Data Movement Table)	Source Table

DATA MOVEMENT SOURCE-MAPPING	
erwin Data Modeler	erwin DI
Source Column (Or Data Movement Column)	Source Column
Source Column Datatype (Or Data Movement Column Datatype)	Source Column Datatype and length Check whether datatype and length are added to the corresponding fields. If not, you need to correct it manually.

Limitations

The following list summarizes the limitations of erwin DM Connect for DI.

- If table's or column's Definition property is updated in a model, the update is not exported when the job is run again. To export the updated Definition, set the job's Export Options to Delete & Reload.
- When you apply an NSM file to a model, it is applied at the model-level. Therefore, it is applied to all versions of the model.
- When you use the validation rules, ensure that the names of valid values do not exceed 200 characters, or the validation rules are not exported to DI.