erwin Data Intelligence Suite

Configuration Guide

Release v10.0

Legal Notices

Contact erwin

Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

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

Accessing Technical Support

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

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

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

Provide Feedback

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

erwin Data Modeler News and Events

Visit www.erwin.com to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

Contents

Legal Notices ... **2**

Contents ... **5**

Configuration ... **8**

- Configuring Mapping Manager ... 8
  - Configuring Change Log Settings ... 9
  - Configuring User-defined Fields ... 11
  - Configuring Version Display ... 13
  - Configuring Mapping State Settings ... 16
  - Configuring Notifications ... 18
- Configuring Metadata Manager ... 26
  - Displaying User Defined Fields ... 28
  - Configuring Table and Column Classes ... 29
  - Configuring Sensitive Data Indicator Classifications ... 32
  - Configuring Data Stewards ... 33
  - Configuring Notifications on Scanning Metadata ... 35
  - Configuring Version Display ... 36
  - Configuring Notifications on Profiling Data ... 38
  - Configuring Data Profiling and DQ Scores ... 39
  - Enforcing Credentials for Data Access or Preview ... 41
- Configuring Codeset Manager ... 42
- Configuring Release Manager ... 44
  - Configuring Release Object Types ... 45

Configuring Environments for Release Objects 46
Configuring Release and Release Object Statuses 49
Configuring History Types 51
Configuring Notifications about Release Objects 53
Configuring Test Manager 54
Configuring Requirements Manager 55
Creating Templates 56
Adding Artifacts to Templates 57
Designing Forms 62
Managing Artifacts 70
Managing Templates 72
Configuring Email Settings 73
Configuring Version Display 77
Business Glossary Manager 78
Configuring Asset Types 80
Configuring Asset Details 81
Configuring Catalog Form 83
Configuring Asset Form 88
Adding Asset Types 94
Configuring Associations and Relationships 96
Other Configurations 101
Edit Property Options 102
Configuring Plugins 103

Configuring Miscellaneous Settings 105
Configuring Email Settings 107
Configuring Language Settings 113
Configuring HP ALM 116
Configuring Tags in Business Glossary Manager 117
Configuring License Renewal Reminders 119
Configuring Form Validation Settings 121
Configuring Form Fields 123
Associating Forms 125
Managing Forms 127
Configuring BUP Details 128
Mapping Lineage Sync 131
Configuring Object Type Colors 132
Configuring License 134

Configuration

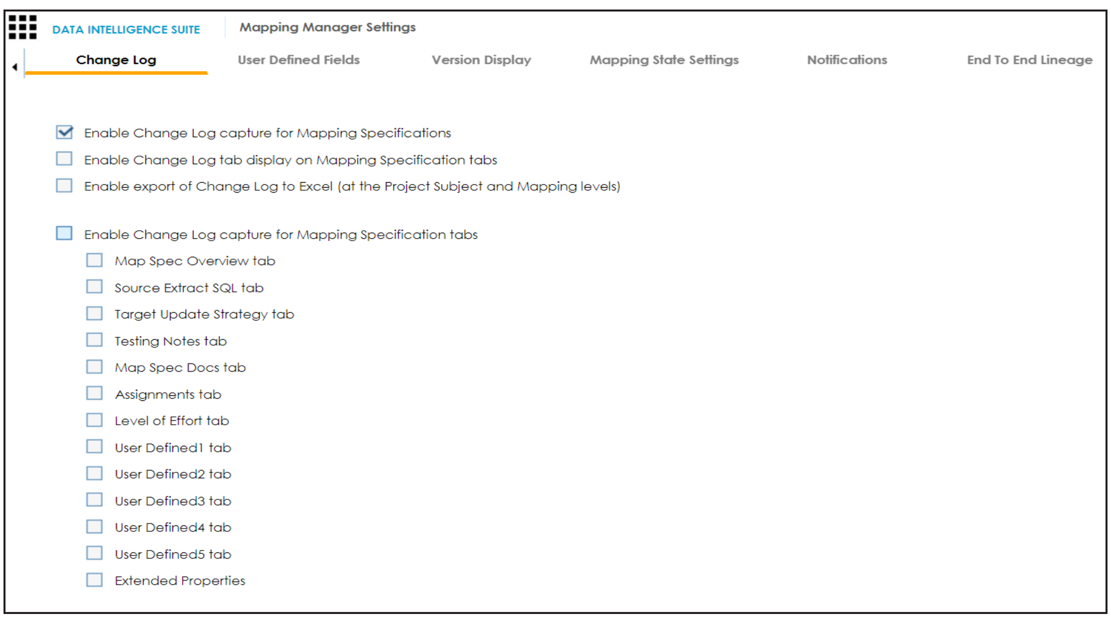
This section walks you through the settings for each module of erwin Data Intelligence Suite (DI Suite). These settings enable you to configure erwin DI Suite according to your preferences.

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** > **Miscellaneous** > **Settings** > **Mapping Manager** The Mapping Manager Settings page appears:



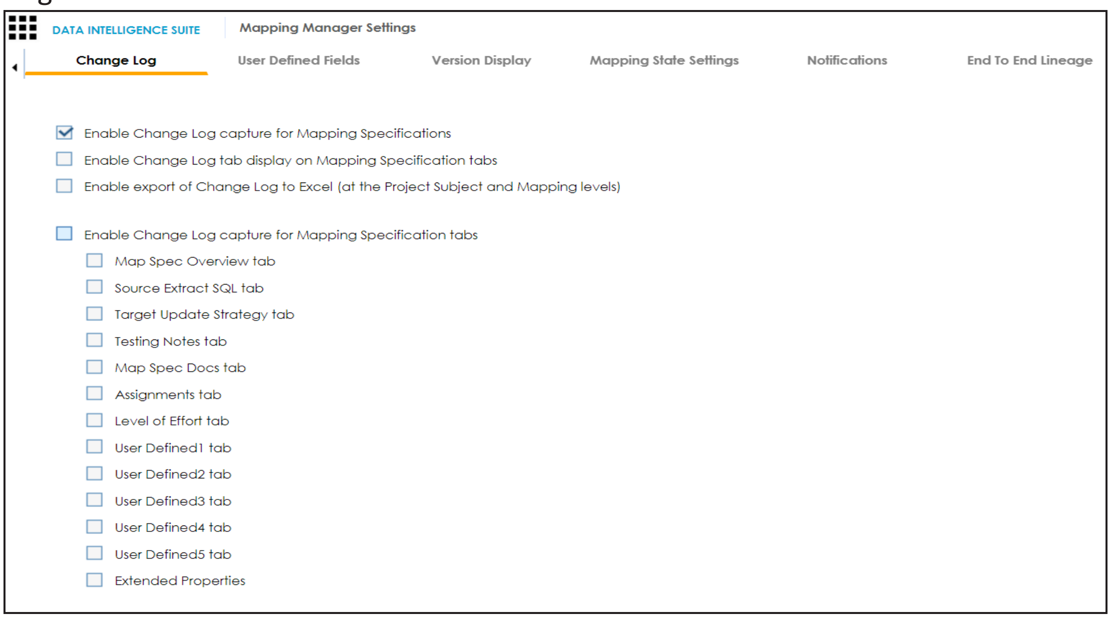
Configuring Change Log Settings

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** > **Miscellaneous** > **Settings** > **Mapping Manager**.

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



2. Use the following options:

   Enable Change Log Capture for Mapping Specifications

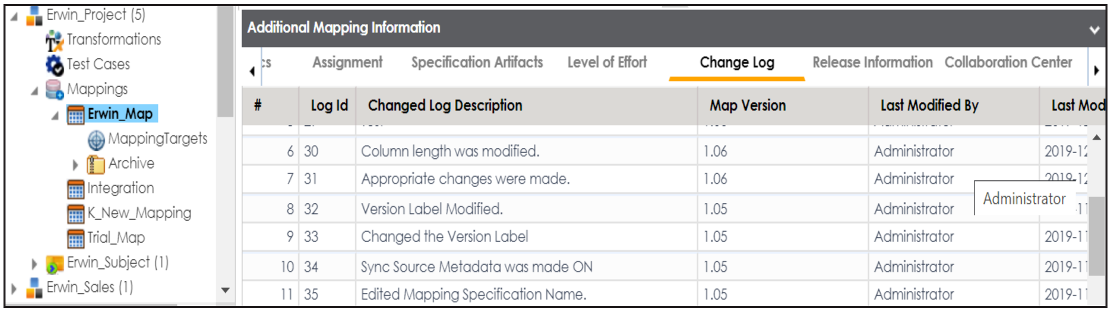
   To capture change logs for the Mapping Specification tab, select the check box.

   Enable Change Log tab display on Mapping Specification tabs

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

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

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



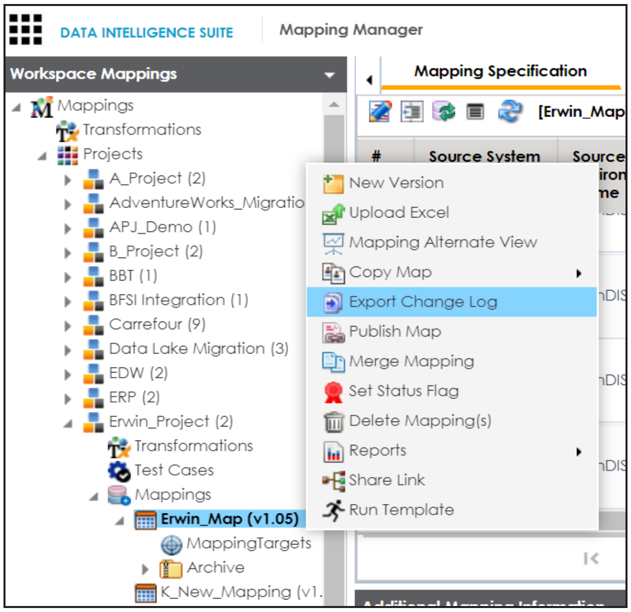
Enable export of Change Logs to MS Excel (at the Project Subject and Mapping Levels)

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.

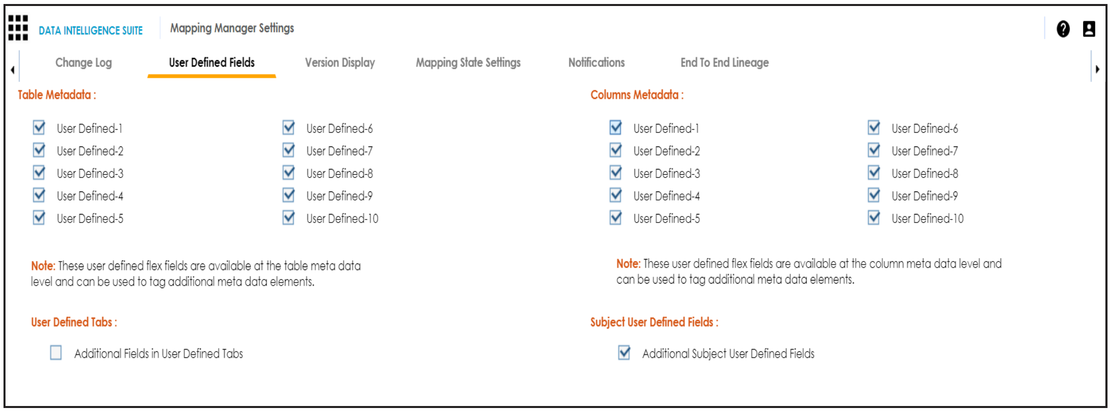
Configuring User-defined Fields

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:

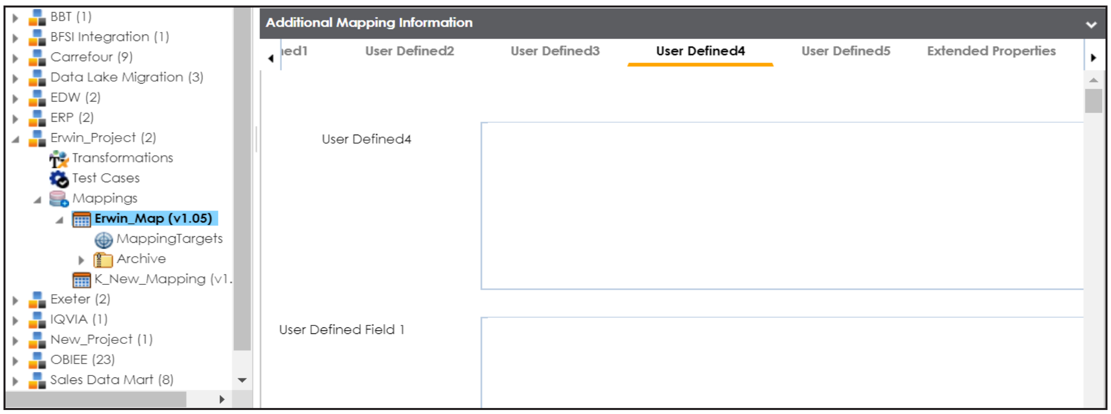
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Mapping Manager**.
2. Click the **User Defined Fields** tab.

The following page appears.



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

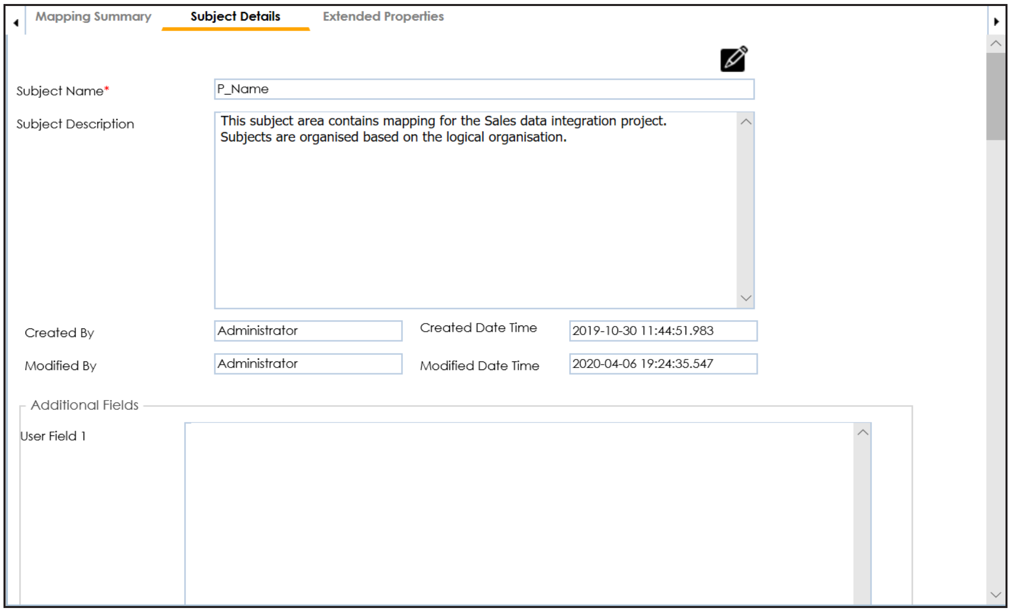
   20 additional fields are added to the User Defined4 and User Defined5 tabs.



   Note: 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.

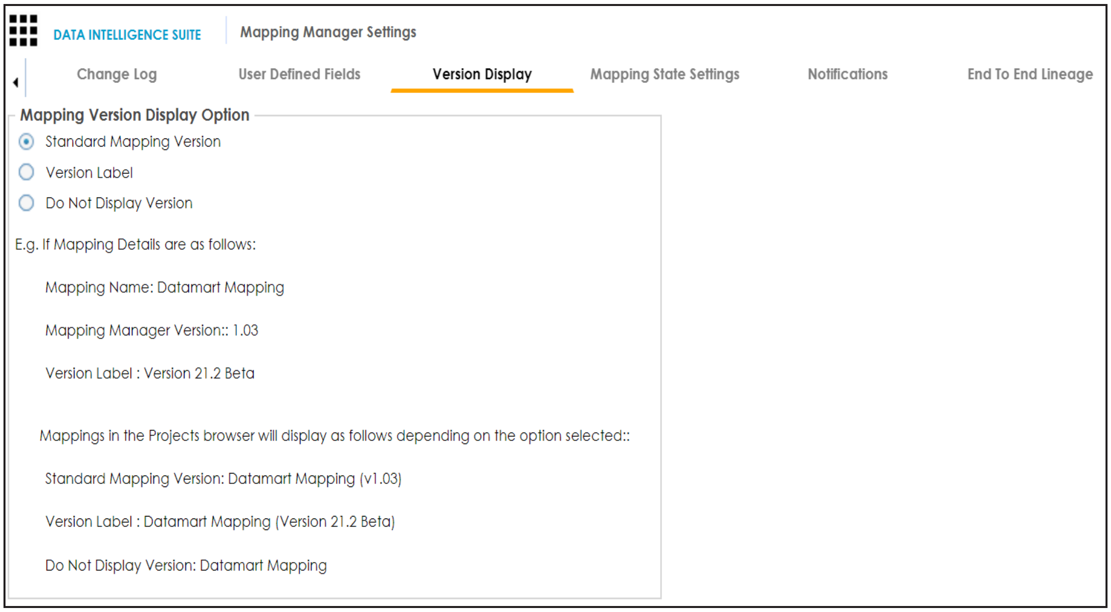
   For example, Erwin_Map (Data_Migration), where Erwin_Map is the Map Name and Data_Migration is the Version Label.

   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** > **Miscellaneous** > **Settings** > **Mapping Manager**.
2. Click the **Version Display** tab.

   The following page appears.

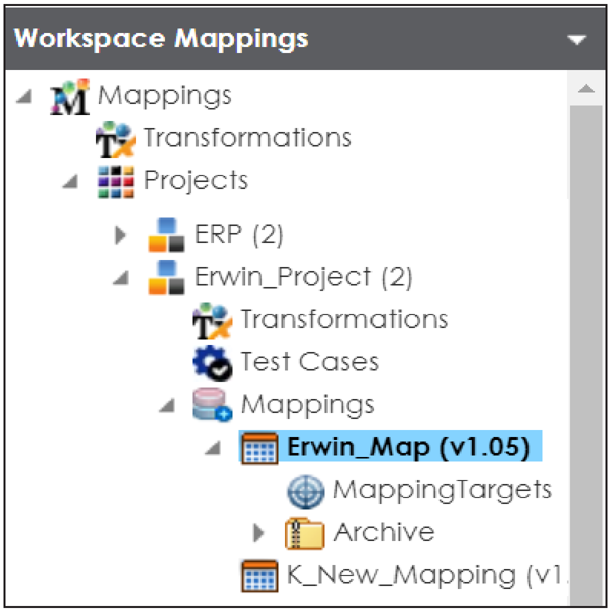


3. Use the following options:

   Standard Mapping Version

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

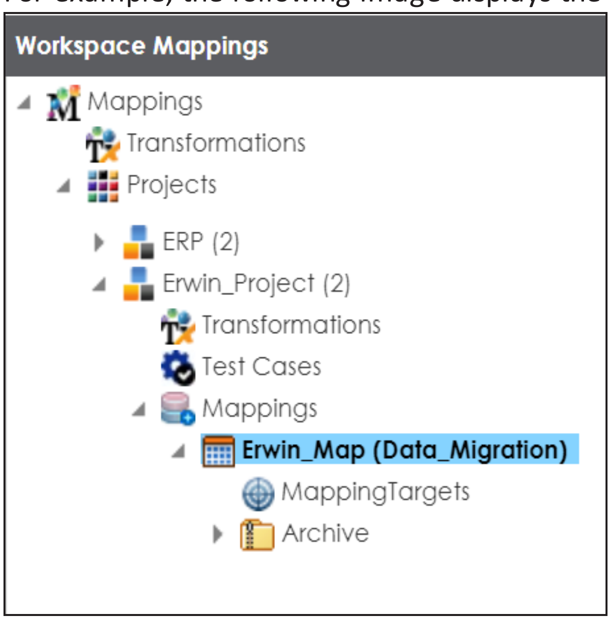
   For example, the following image displays the map version in the standard mapping version form.



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**.

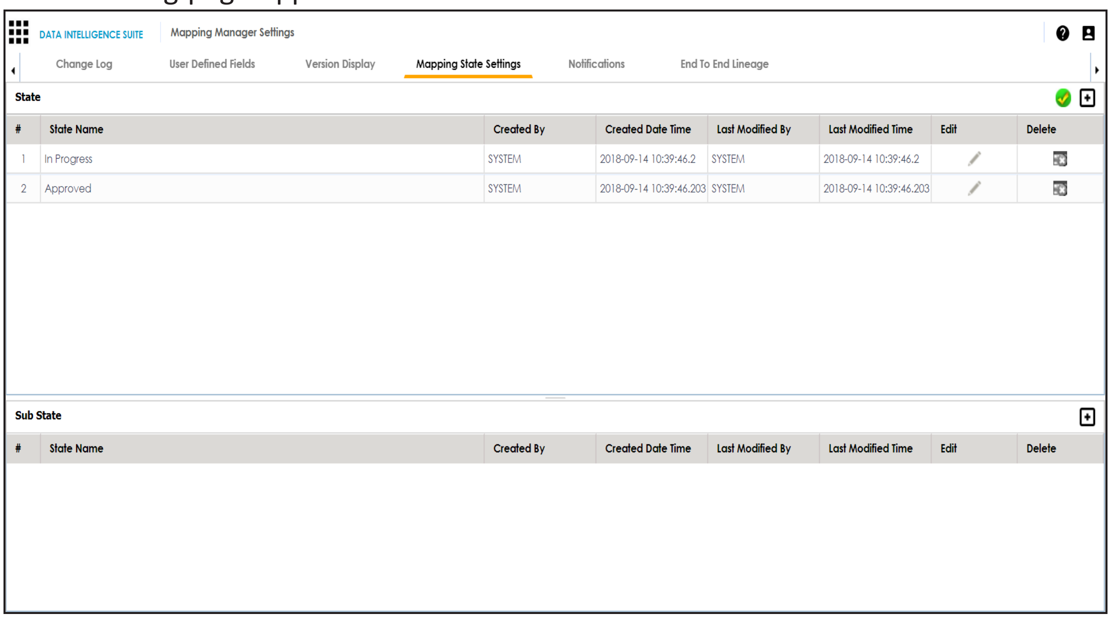
Configuring Mapping State Settings

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:

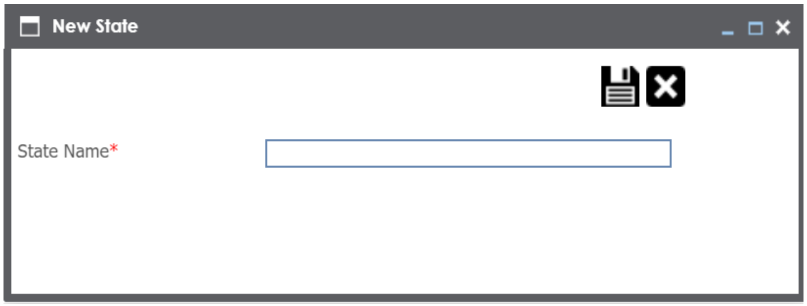
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Mapping Manager**.
2. Click the **Mapping State Settings** tab.

   The following page appears.

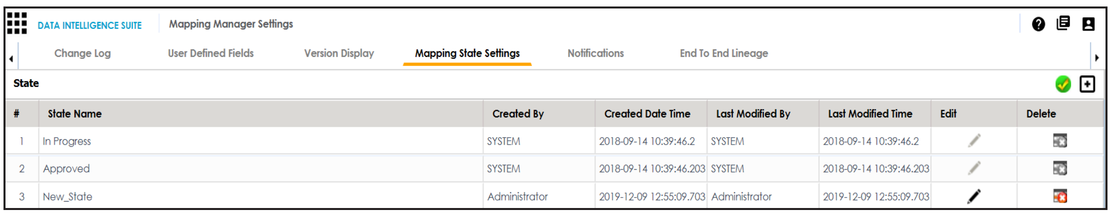
3. Click .

   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.

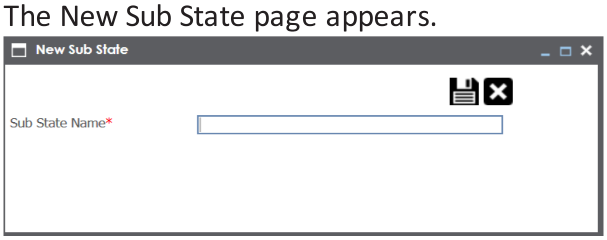
Delete ()

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

To configure sub-states, follow these steps:

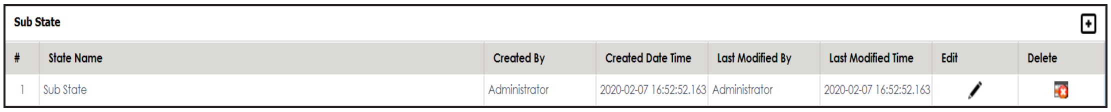
1. Under the **Sub State section**, click .

   The New Sub State page appears.



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

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



Sub State

#	State Name	Created By	Created Date Time	Last Modified By	Last Modified Time	Edit	Delete
1	Sub State	Administrator	2020-02-07 16:52:52.163	Administrator	2020-02-07 16:52:52.163		

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:

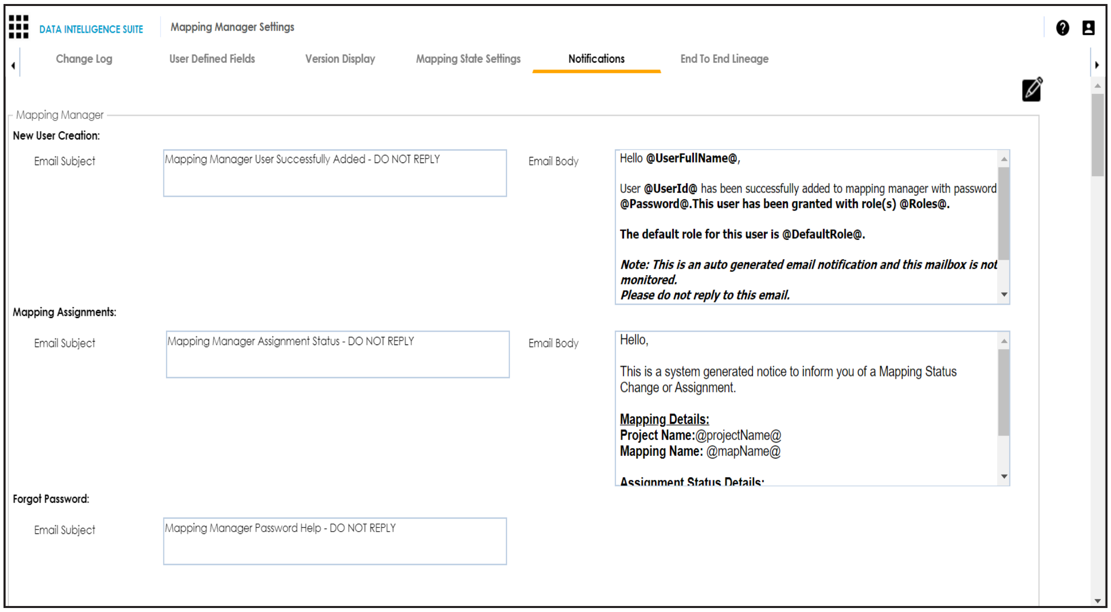
- Creating new users
- Assigning maps to users
- Forgetting user credentials
- Creating new maps
- Updating mapping specifications
- Creating versions of maps
- Merging maps
- Copying and pasting maps
- Uploading mapping specification in XML
- Base-lining projects

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** > **Miscellaneous** > **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.

For more information on mapping assignment, refer to the Assigning Mapping Specifications to Users topic.

Forgot Password

Use this section to configure email notifications to users who forgot their Username (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:

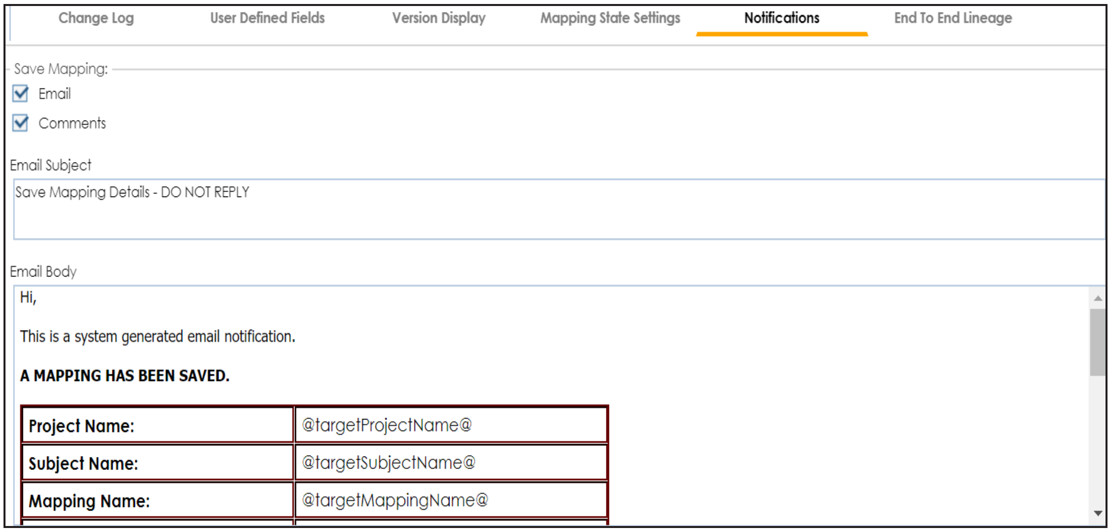
Email: To turn on email notifications, select the **Email** check box.

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.

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

For more information on creating maps, refer to the Creating Maps topic.



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

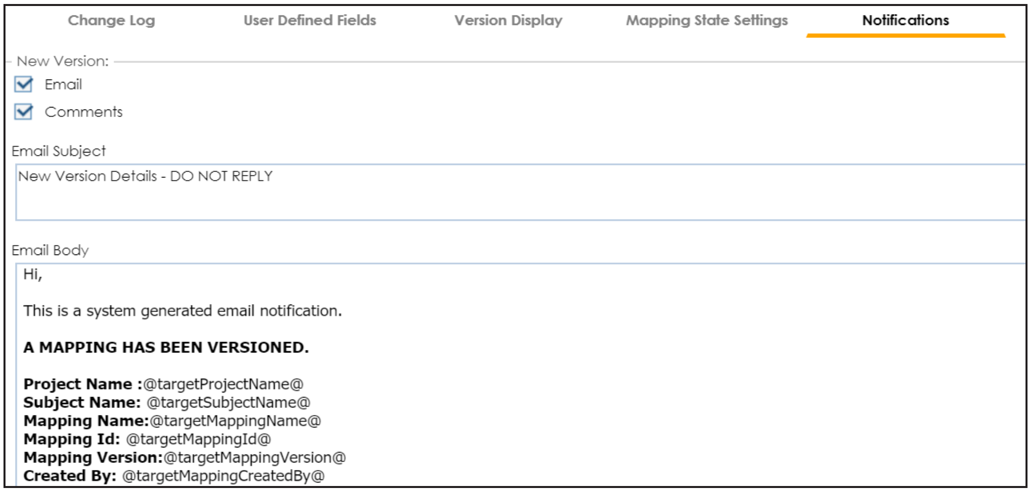
Use the following options:

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:

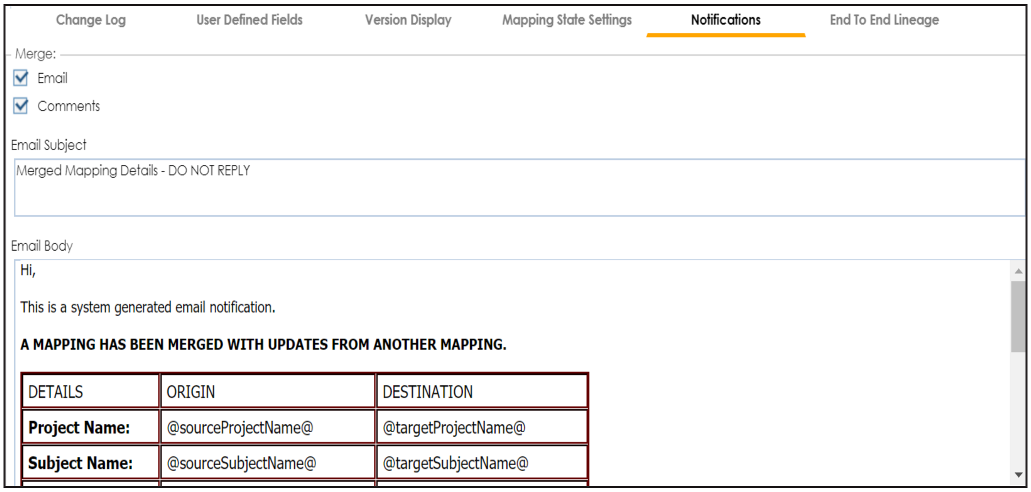
Email: To turn on email notifications, select the **Email** check box.

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:

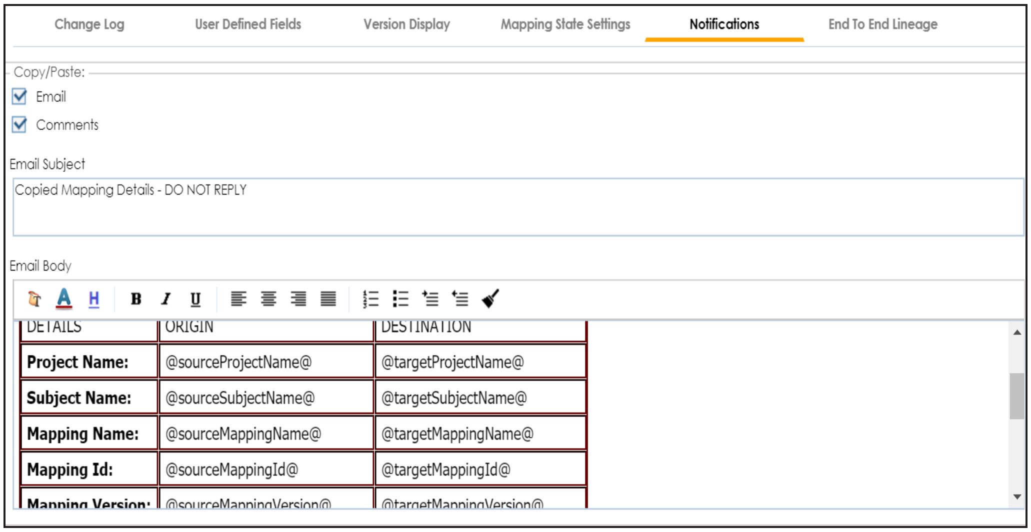
Email: To turn on email notifications, select the **Email** check box.

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:

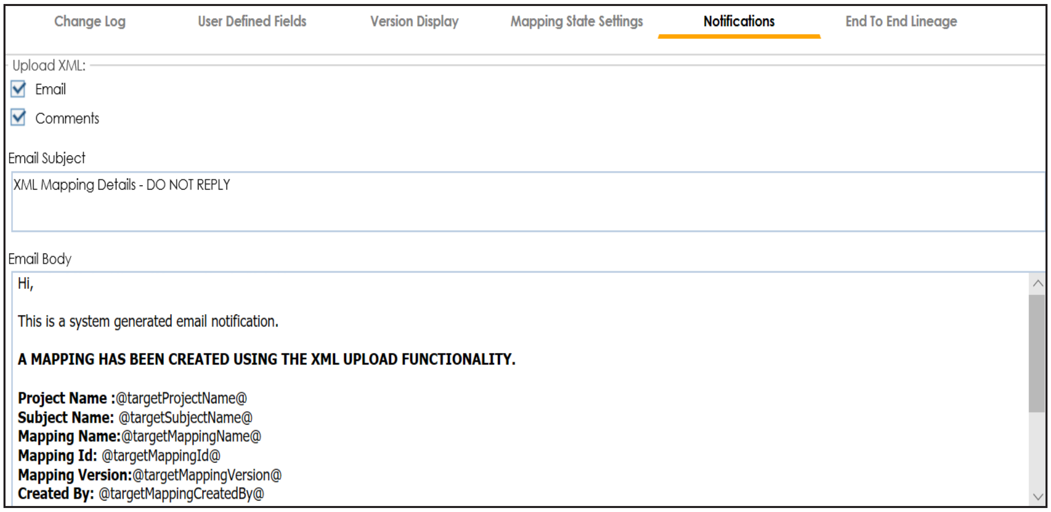
Email: To turn on email notifications, select the **Email** check box.

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:

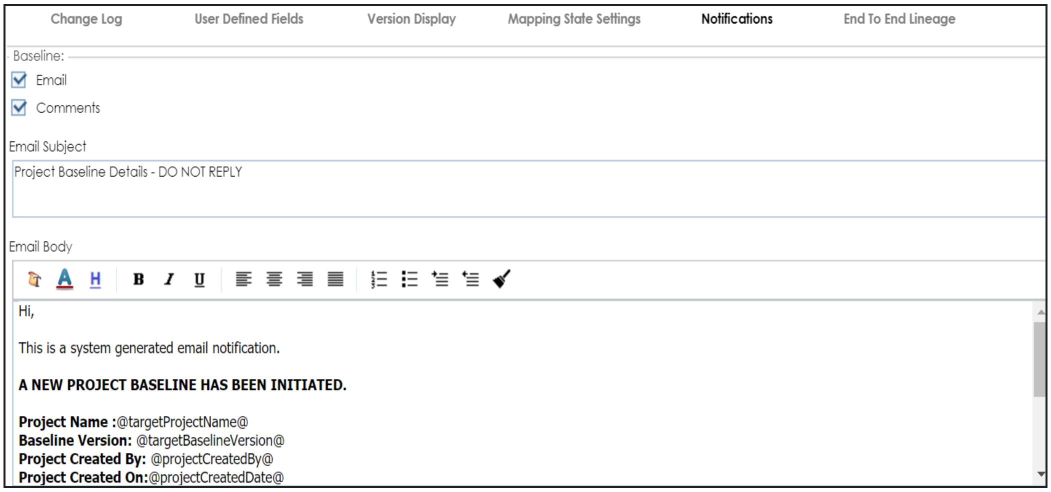
Email: To turn on email notifications, select the **Email** check box.

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

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

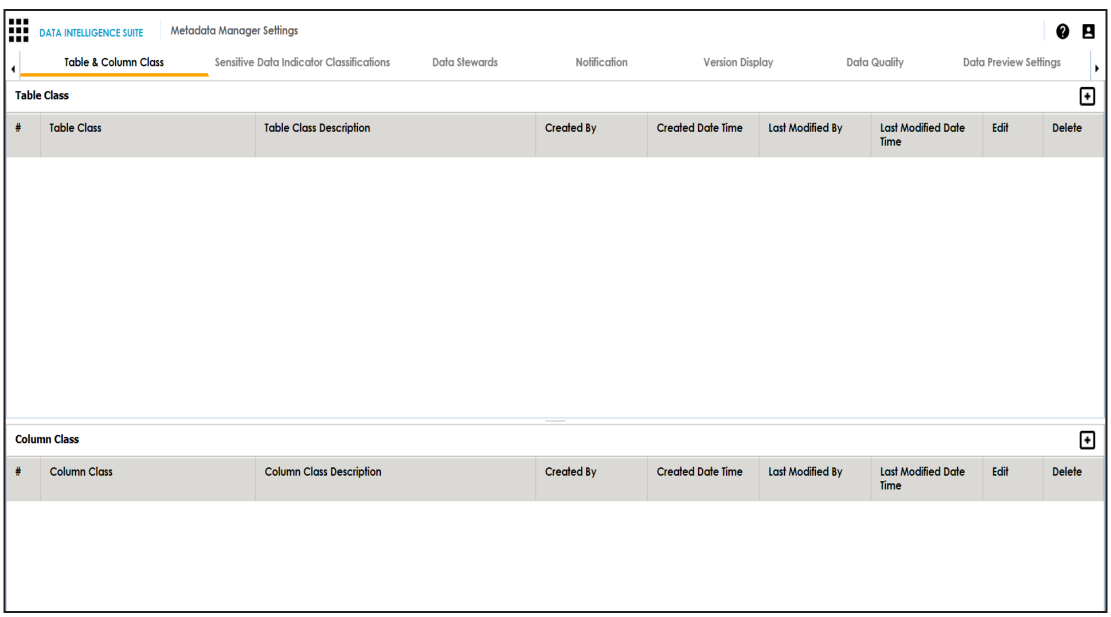
- User defined fields: Under this you can display user defined fields in the Table Properties and Column properties tab.

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

- Table and column classes: Under this you can configure table and column classes.
- Sensitive data indicator classifications: Under this you can configure sensitive data indicator classifications.
- Data stewards: Under this you can configure the Data Stewards list.
- Notifications on scanning metadata: Under this you can configure email notifications to users about the metadata scan jobs.
- Version display of environments: Under this you can configure version display of environments.
- Notifications on profiling data: Under this you can configure email notifications to users about the data profiling job.
- Data profiling and DQ scores: Under this you can configure data profiling parameters and DQ score option list.
- Credentials for data access or preview: Under this you can enforce credentials for data acess/preview.

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

The Metadata Manager Settings page appears:



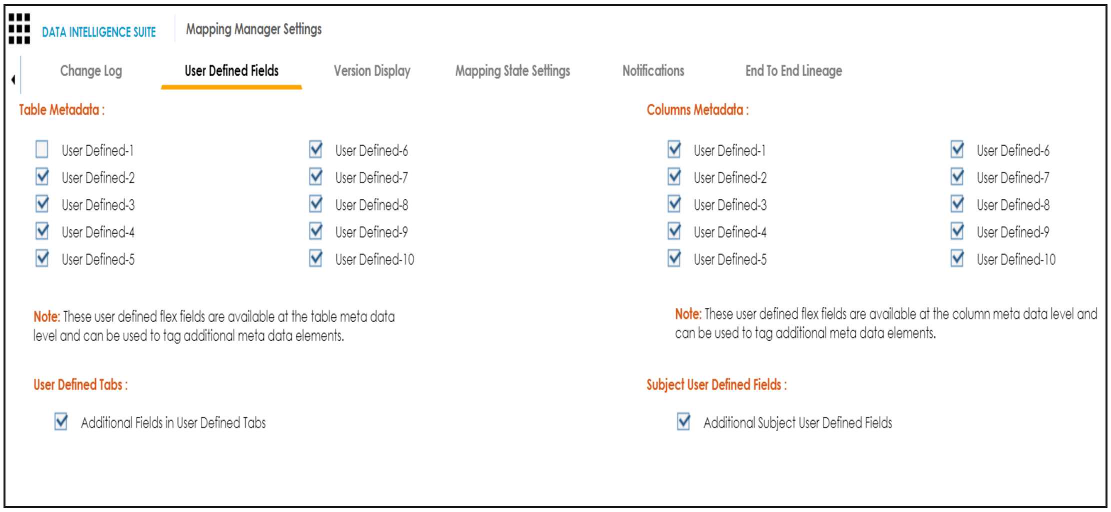
Displaying User Defined Fields

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** > **Miscellaneous** > **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.

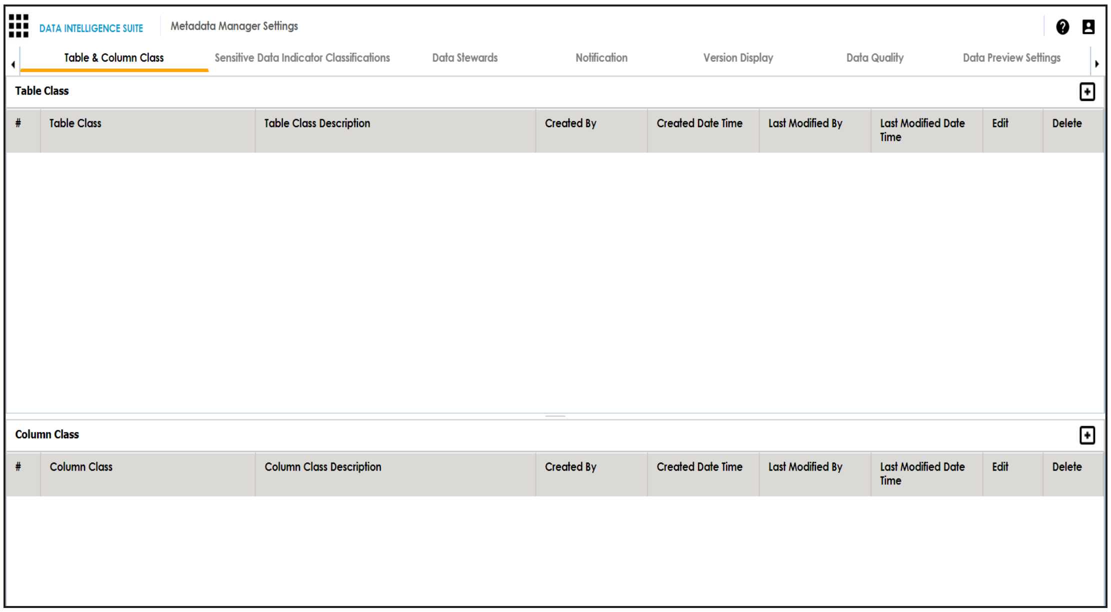
Configuring Table and Column Classes

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:

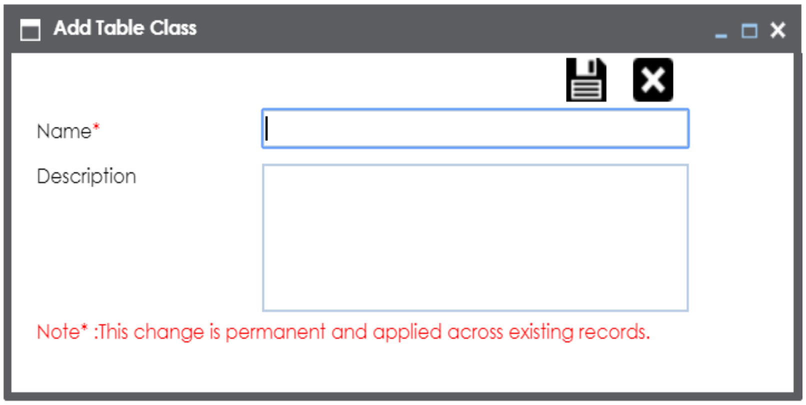
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Metadata Manager**.

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



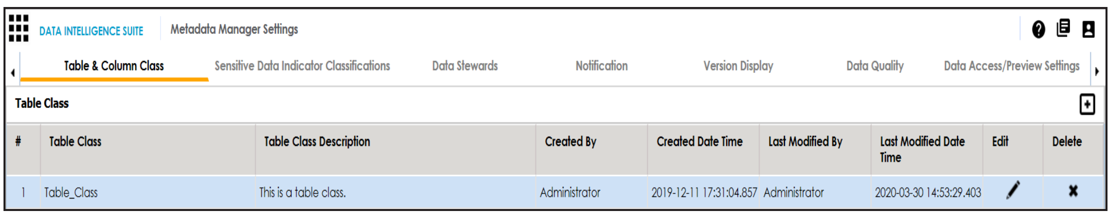
2. Under the **Table Class** section, click .

   The Add Table Class page appears.



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

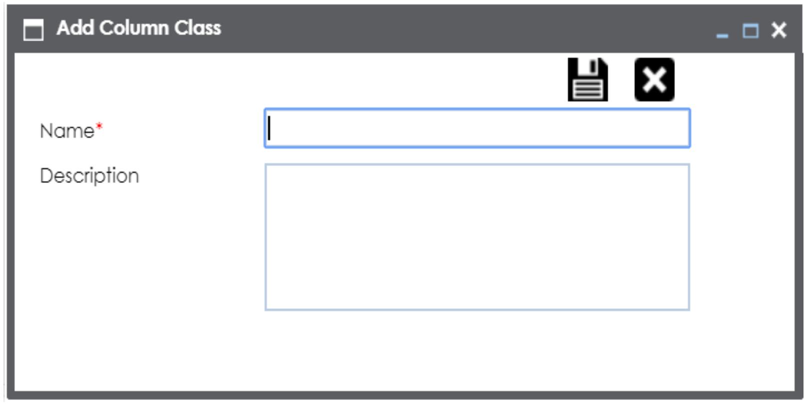
   Delete ()

   To delete the table class, click .

To configure column classes, follow these steps:

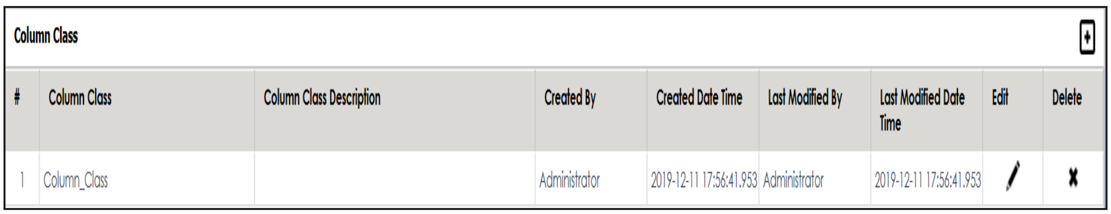
1. Under the **Column Class** section, click .

   The Add Column Class page appears.



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

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



Column Class

#	Column Class	Column Class Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Column_Class		Administrator	2019-12-11 17:56:41.953	Administrator	2019-12-11 17:56:41.953		

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.

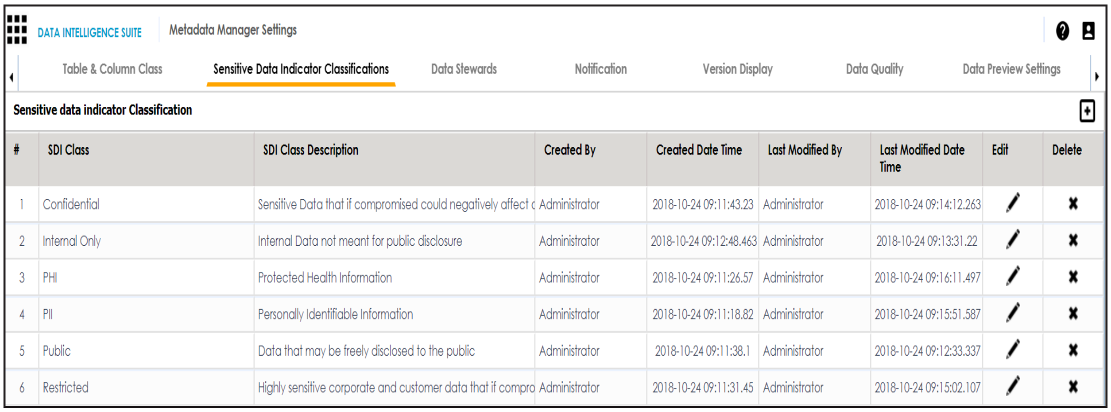
Configuring Sensitive Data Indicator Classifications

You can configure sensitive data indicator classifications to define sensitive data in a column.

To configure sensitive data indicator classifications, follow these steps:

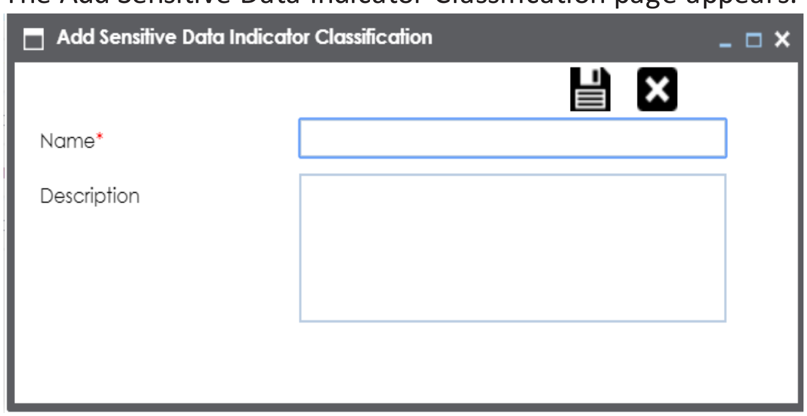
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Metadata Manager**.
2. Click the **Sensitive Data Indicator Classifications** tab.

   The Sensitive data indicator Classification page appears.

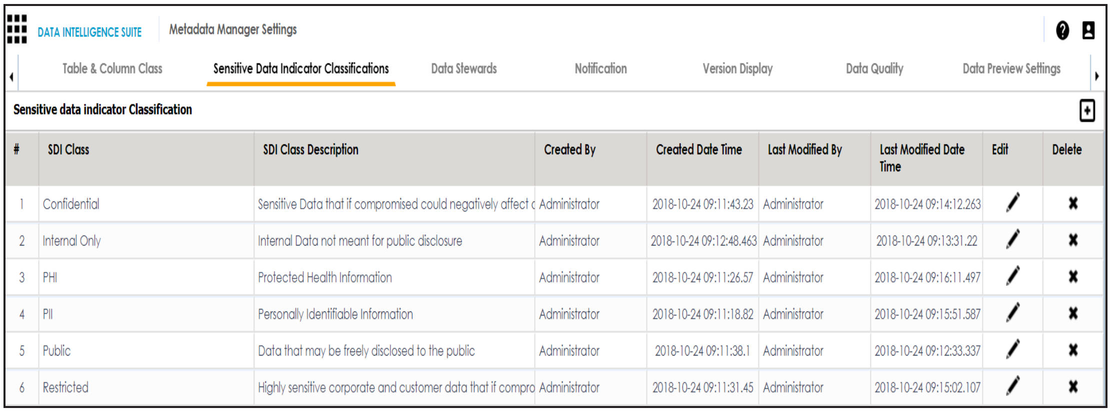
3. Click .

   The Add Sensitive Data Indicator Classification page appears.

4. Enter the Name and Description of the sensitive data indicator classification.
5. Click .

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



#	SDI Class	SDI Class Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Edit	Delete
1	Confidential	Sensitive Data that if compromised could negatively affect c	Administrator	2018-10-24 09:11:43.23	Administrator	2018-10-24 09:14:12.263		
2	Internal Only	Internal Data not meant for public disclosure	Administrator	2018-10-24 09:12:48.463	Administrator	2018-10-24 09:13:31.22		
3	PHI	Protected Health Information	Administrator	2018-10-24 09:11:26.57	Administrator	2018-10-24 09:16:11.497		
4	PII	Personally Identifiable Information	Administrator	2018-10-24 09:11:18.82	Administrator	2018-10-24 09:15:51.587		
5	Public	Data that may be freely disclosed to the public	Administrator	2018-10-24 09:11:38.1	Administrator	2018-10-24 09:12:33.337		
6	Restricted	Highly sensitive corporate and customer data that if compro	Administrator	2018-10-24 09:11:31.45	Administrator	2018-10-24 09:15:02.107		

6. Use the following options:

   Edit ( )

   To edit the classification, click .

   Delete ( )

   To delete the classification, click .

   You can use the classification to update column properties in the Metadata Manager.

   For more information on updating column properties, refer to the Updating Column Properties topic.

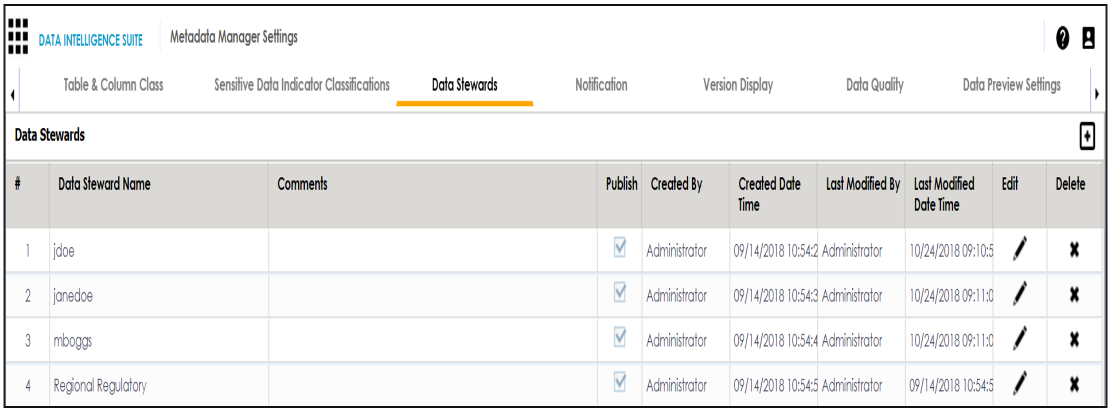
Configuring Data Stewards

You can configure and manage the list of data stewards and assign data stewards to systems, environments, tables, and columns.

To configure the list of data stewards, follow these steps:

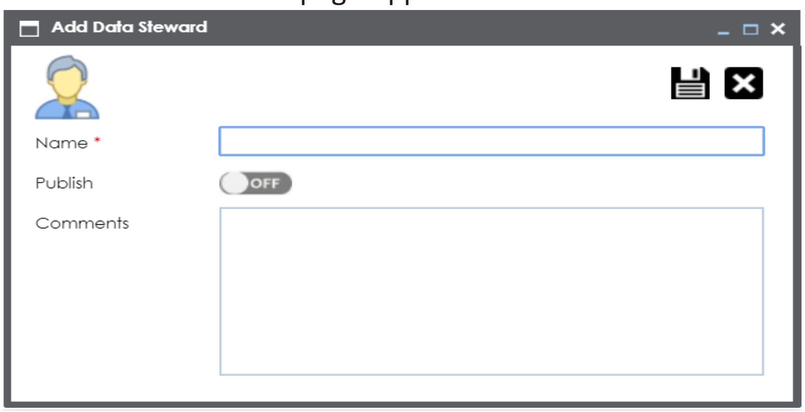
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Metadata Manager**.
2. Click the **Data Stewards** tab.

   The Data Stewards page appears.



3. Click .

The Add Data Steward 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
Name	Specifies the name of the data steward. For example, Jane Doe.
Publish	Specifies whether the data steward is published. Turn the **Publish** to **ON** to publish the data steward.
Comments	Specifies the comments about the data steward. For example: The data steward was added to the list after examining her

Field Name	Description
	capabilities.

5. Click .

   The data steward is added and saved under the Data Stewards grid.

6. Use the following options:

   Edit ()

   To edit the data steward, click .

   Delete ()

   To delete the data steward, click .

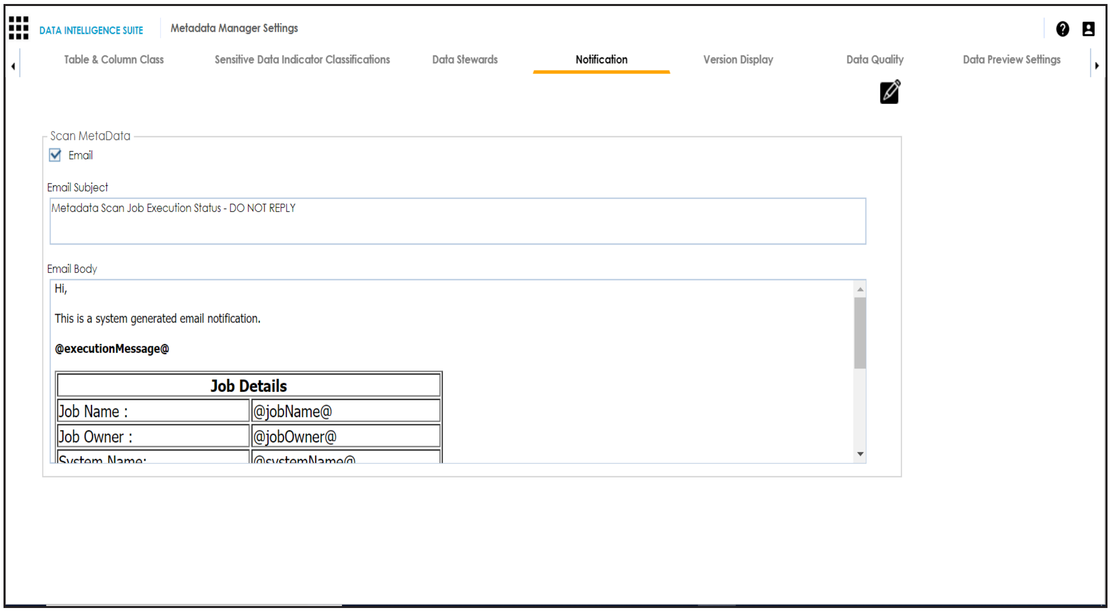
Configuring Notifications on Scanning Metadata

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** > **Miscellaneous** > **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.

   Email Body

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

   The email notification is configured.

For more information on scheduling a metadata scan, refer to the Scheduling Metadata Scans topic.

Configuring Version Display

You can display the environment version in two ways:

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

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

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

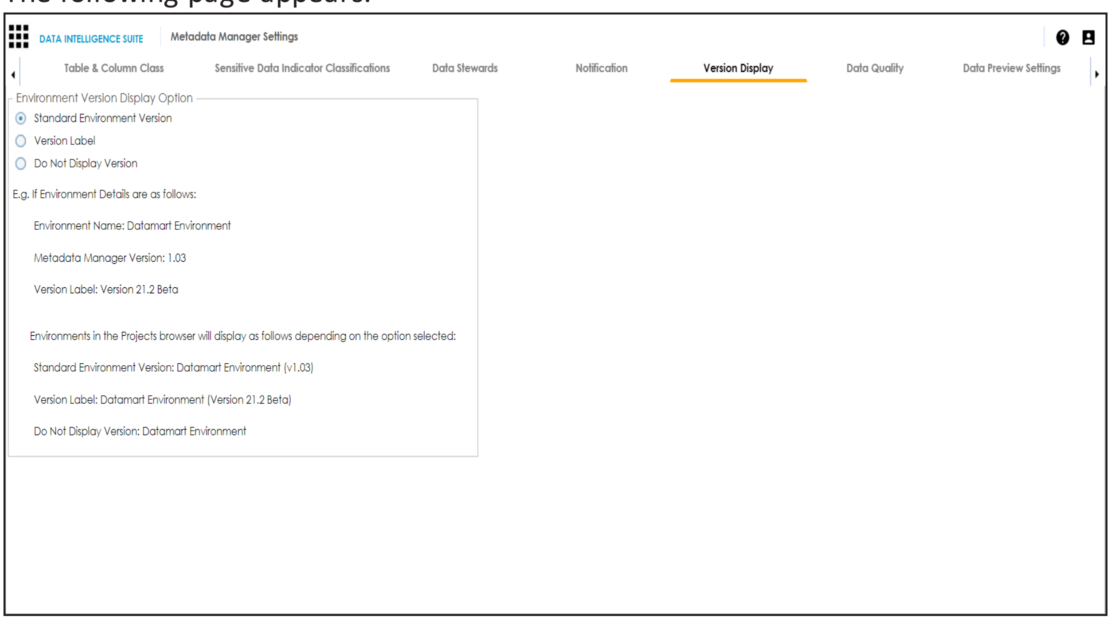
   For example, Data_Migration (erwin_Metadata), where Data_Migration is the environment name and erwin_Metadata is the version label.

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

To configure version display of environments, follow these steps:

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

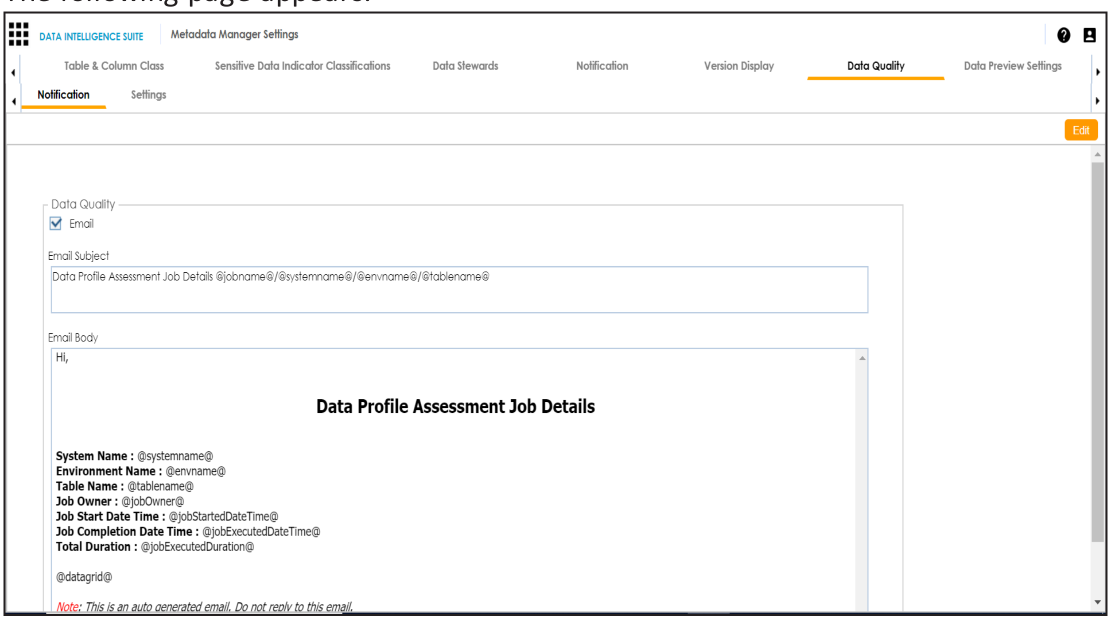
Configuring Notifications on Profiling Data

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** > **Miscellaneous** > **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

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

   Email Body

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

5. Click **Save**.

   The email notification is configured.

   For more information on scheduling data profile job, refer to the Profiling Data at Table Level topic.

Configuring Data Profiling and DQ Scores

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

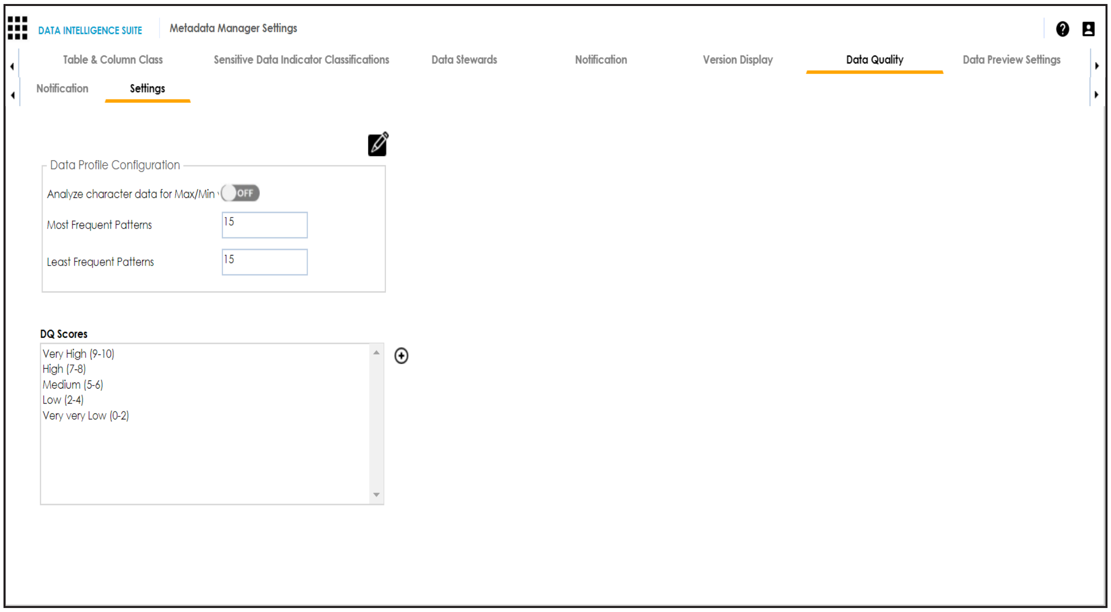
Configuring data profiling parameters involves specifying:

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

To configure data profiling parameters, follow these steps:

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

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

Most Frequent Patterns

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

Least Frequent Patterns

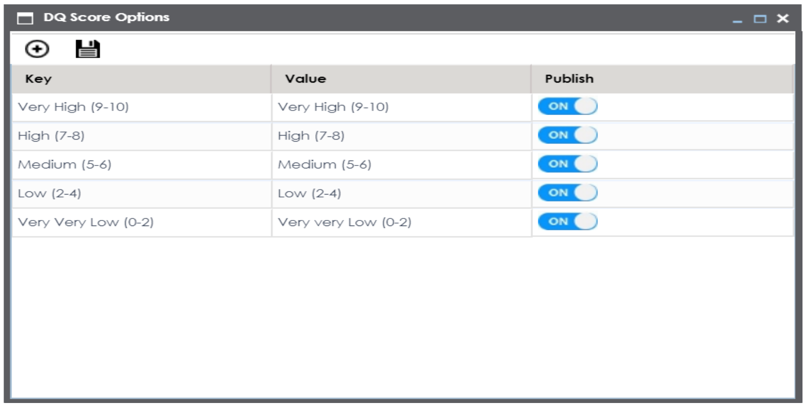
This option specifies the number of bottom least frequent patterns to be displayed in the Data Profiling Pattern Summary report. To set the number of bottom least frequent patterns for display, type the number in the **Least Frequent Patterns** box.

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

To configure DQ score option, follow these steps:

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

   The DQ Score Options page appears.

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.

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

5. Click .

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

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

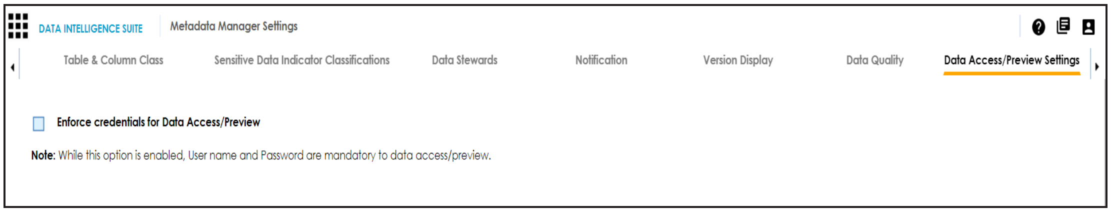
Enforcing Credentials for Data Access or Preview

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

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

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

Configuring Codeset Manager

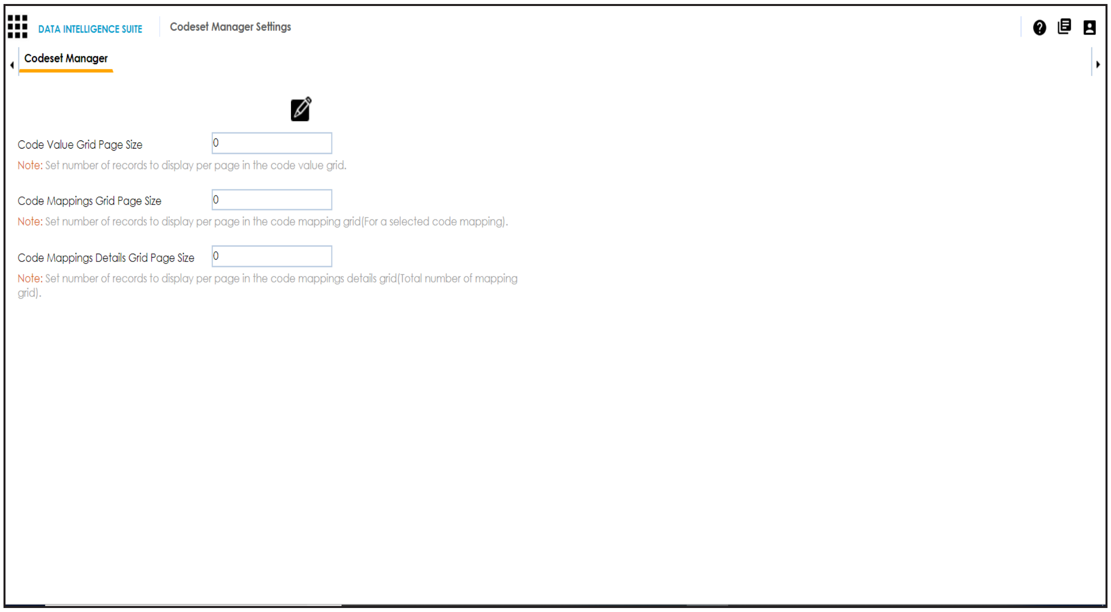
You can configure number of records per page in the Codeset Manager for:

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

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

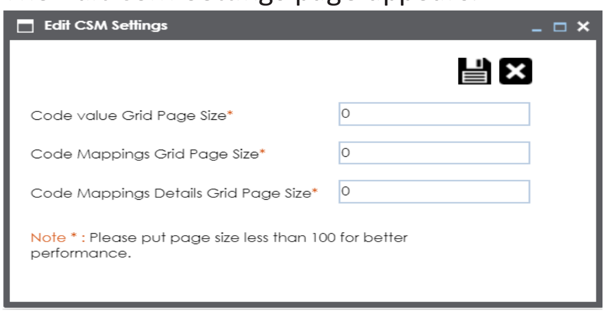
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Codeset Manager**.

   The following page appears.



2. Click .

The Edit CSM Settings page appears.



3. Use the following options:

Code value Grid Page Size

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

Code Mappings Grid Page Size

Set the number of records to display per page in the code mapping grid.
Note: 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 ()

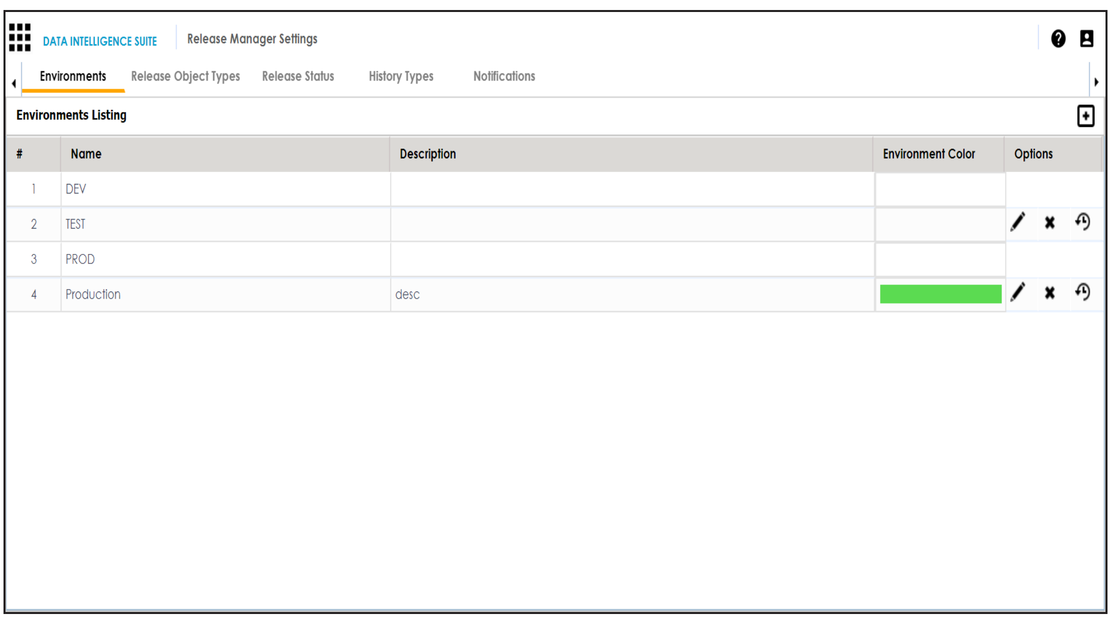
To save the page sizes, click .

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** > **Miscellaneous** > **Settings** > **Release Manager**. The Release Manager Settings page appears:



Configuring Release Object Types

The Release Manager comes with three default release object types:

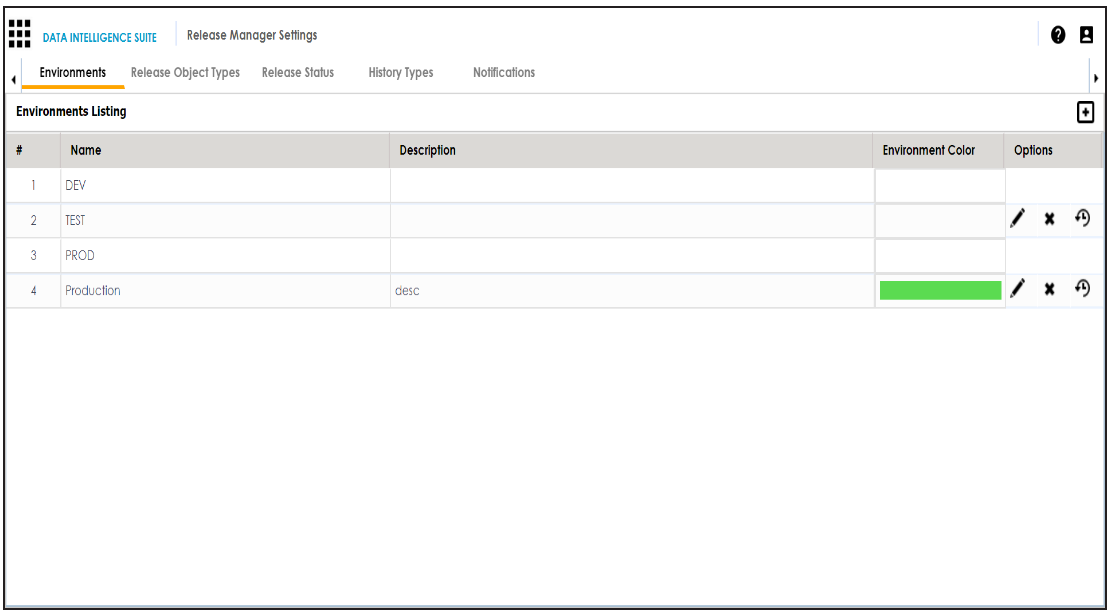
1. Data Item Mapping
2. Codeset
3. Code Mappings

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

To add new release object types, follow these steps:

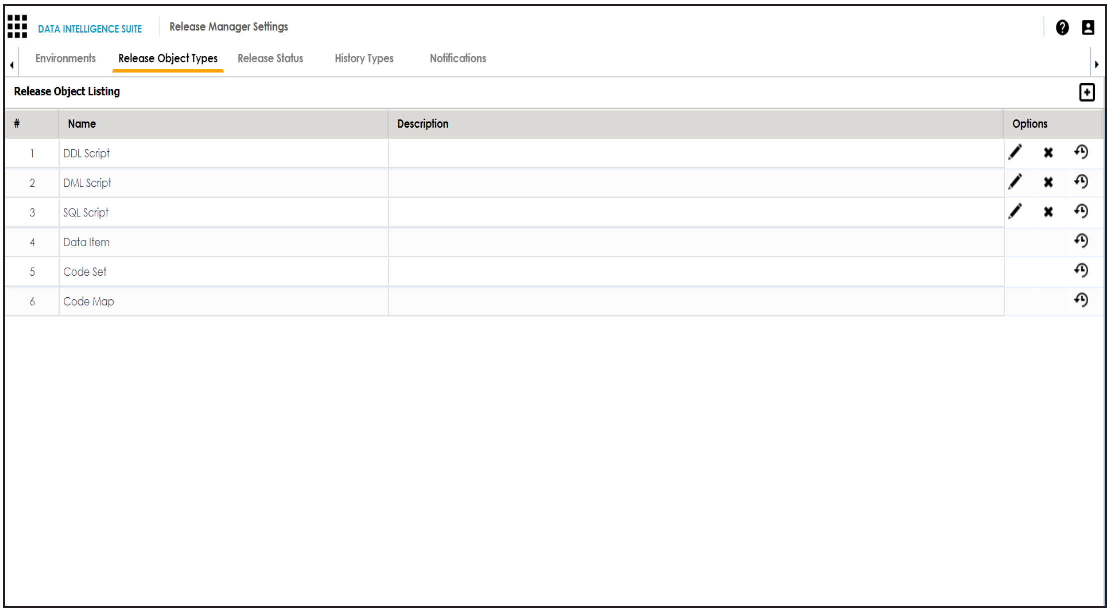
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Release Manager**.

   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.

6. To edit the release object type, click .

7. To delete the release object type, click .

8. To view history details, click .

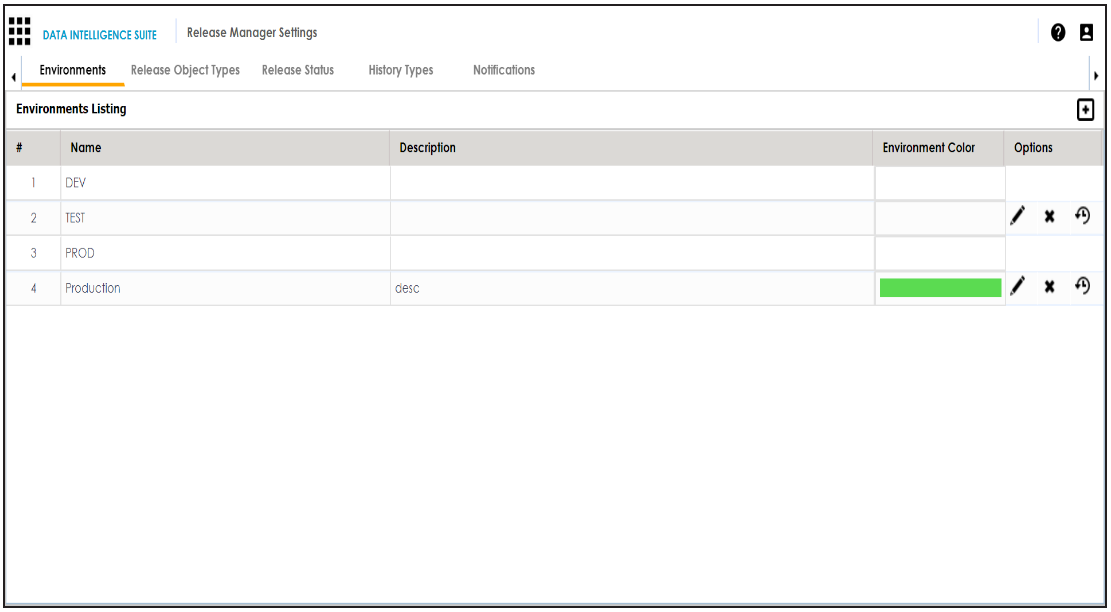
Configuring Environments for Release Objects

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:

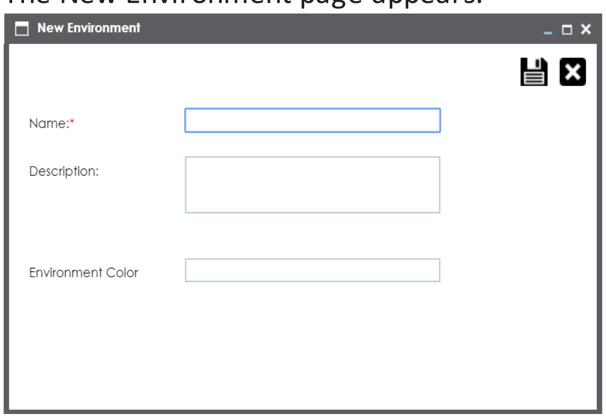
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Release Manager**.

   The following page appears.

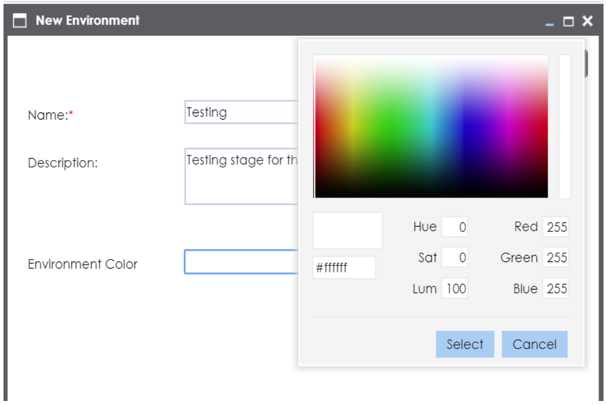


2. Click .

   The New Environment page appears.

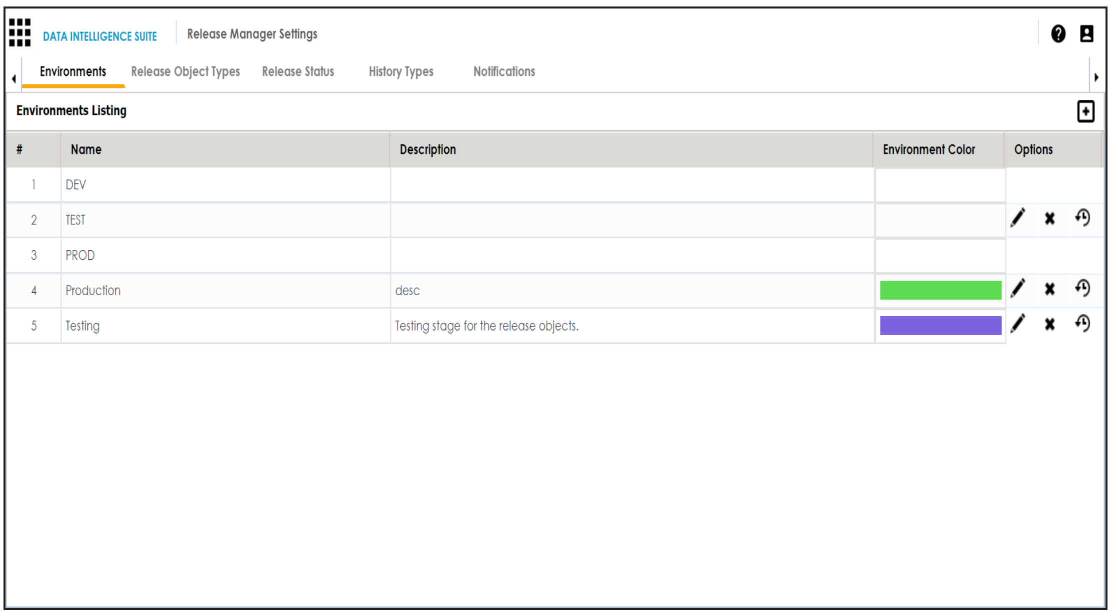


3. Enter the Name and Description.
4. Choose Environment Colour.



5. Click **Select**.
6. Click .

The environment is added.



7. To edit the environment, click .
8. To delete the environment, click .
9. To view history details, click

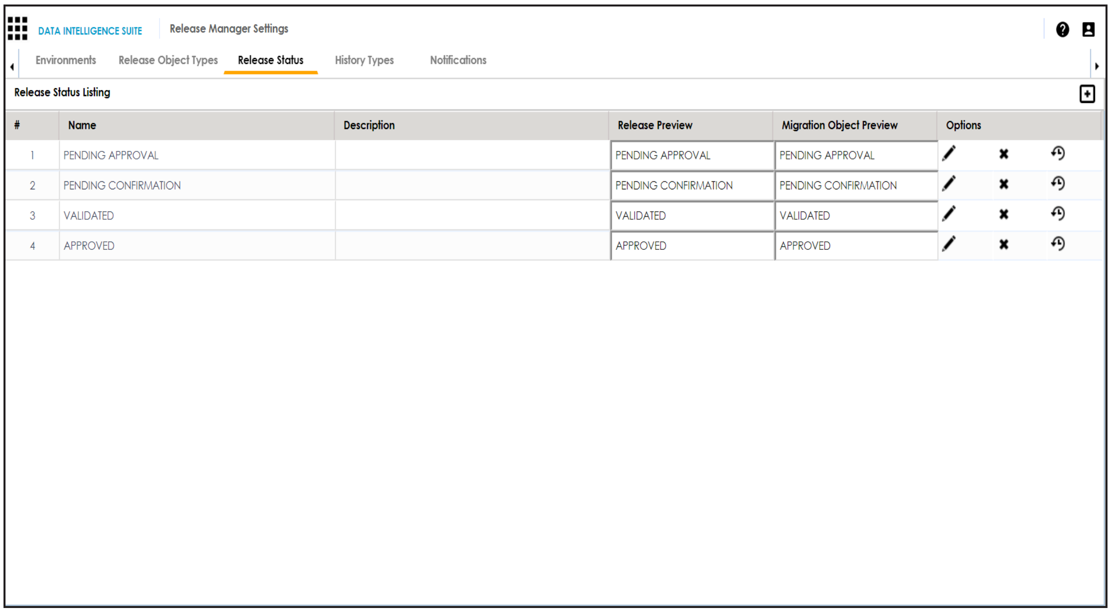
Configuring Release and Release Object Statuses

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:

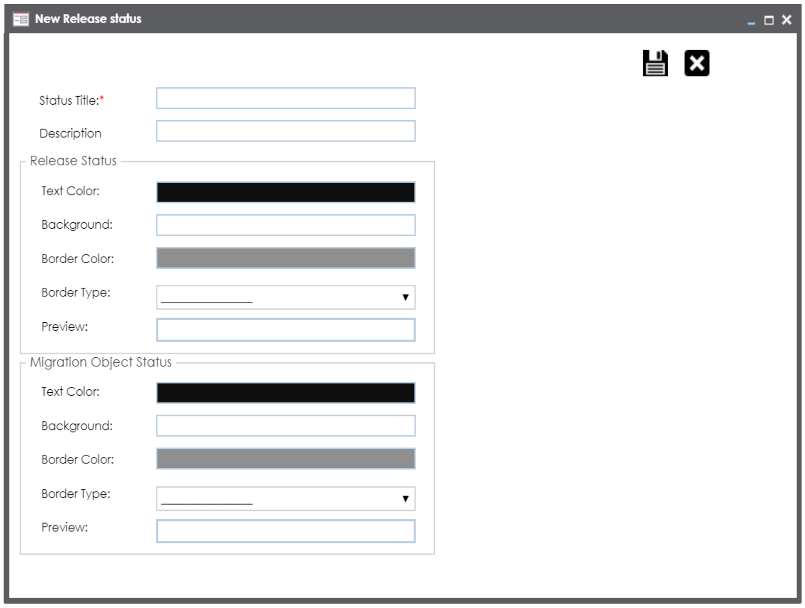
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Release Manager**.
2. Click Release Status.

   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 desired text colour for the Release Status.
	Background	Click the cell and select the desired background colour for the Release Status.
	Border Color	Click the cell and select the desired border colour for the Release Status.
	Border Type	Select the desired border type for the Release Status.
	Preview	You can view the preview of the release status based on your above selections.
Migration Object	Text Colour	Click the cell and select the desired text colour for the

Field Name	Sub-Field	Description
Status		Object Status.
	Background	Click the cell and select the desired background colour for the Object Status.
	Border Col-our	Click the cell and select the desired border colour for the Object Status.
	Border Type	Select the desired 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.

6. To edit the release status, click .
7. To delete the release status, click .
8. To view history details, click .

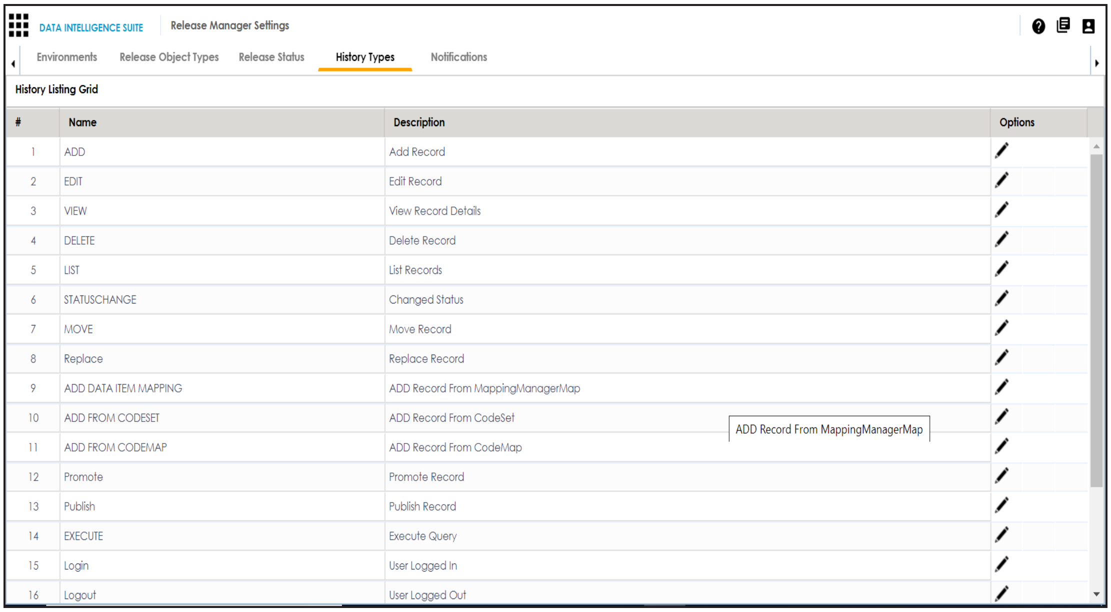
Configuring History Types

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:

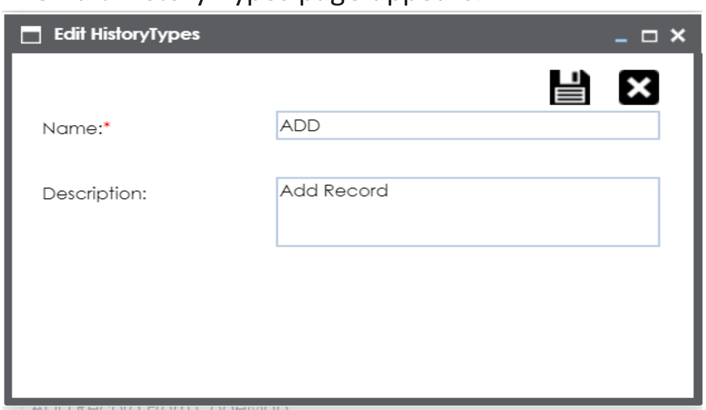
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Release Manager**.
2. Click **History Types**.

   The History Listing Grid page appears.



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.

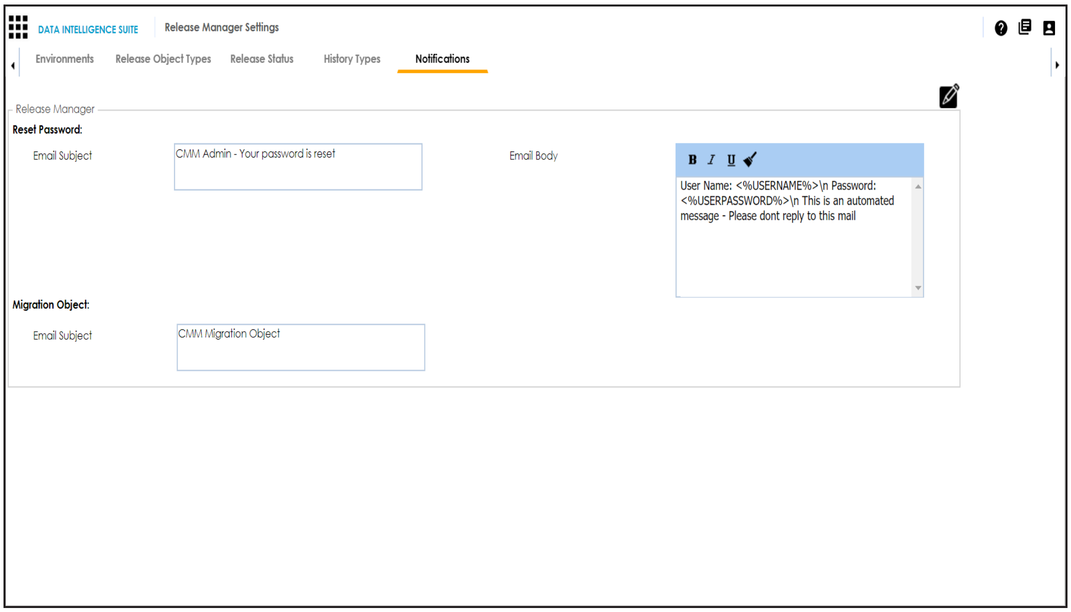
Configuring Notifications about Release Objects

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** > **Miscellaneous** > **Settings** > **Release Manager**.
2. Click **Notifications**.

   The following page appears.

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

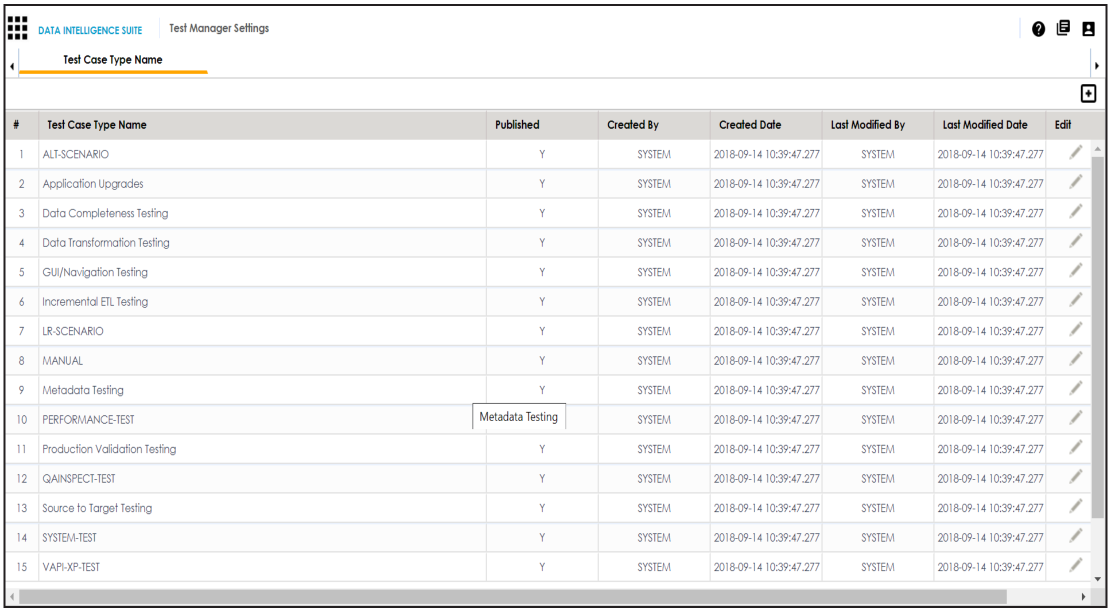
   This email is used to send notifications to any concerned team member from the Admin Email Id which can be configured in Email Settings.

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.

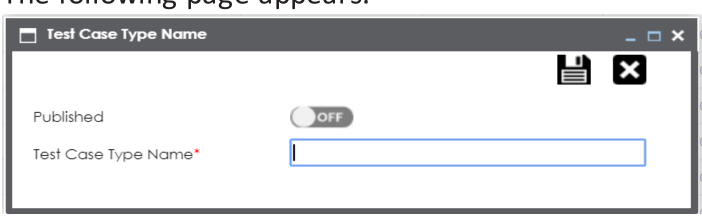
To configure test case types, follow these steps:

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



2. Click .

   The following page appears.



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

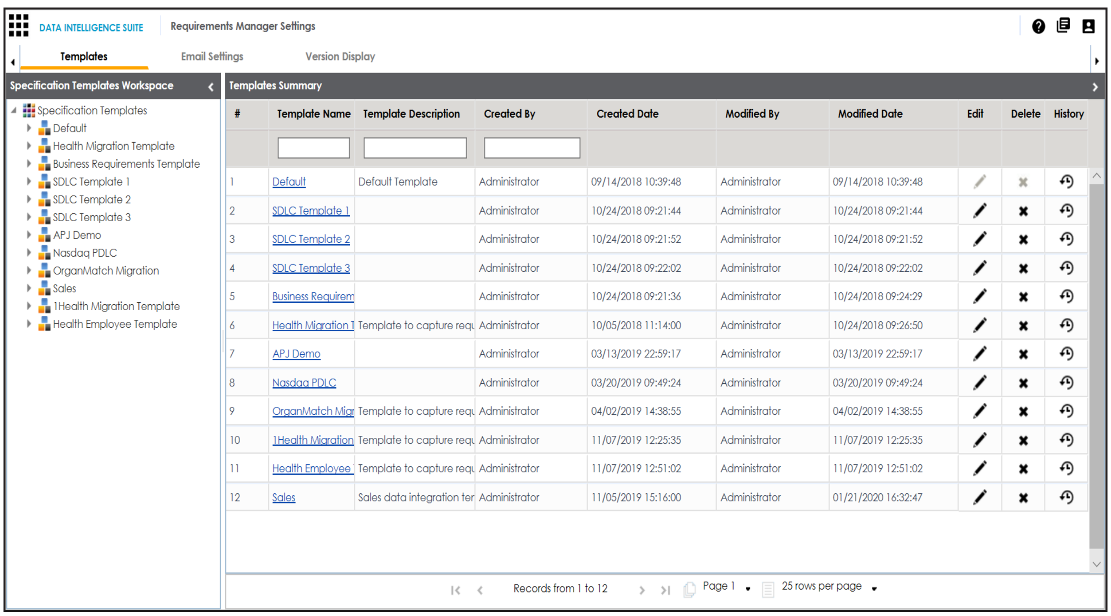
   The new test case type is added to the list.

Configuring Requirements Manager

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

- Templates: 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** > **Miscellaneous** > **Settings** > **Requirements Manager**. The Requirements Manager Settings page appears:



Creating Templates

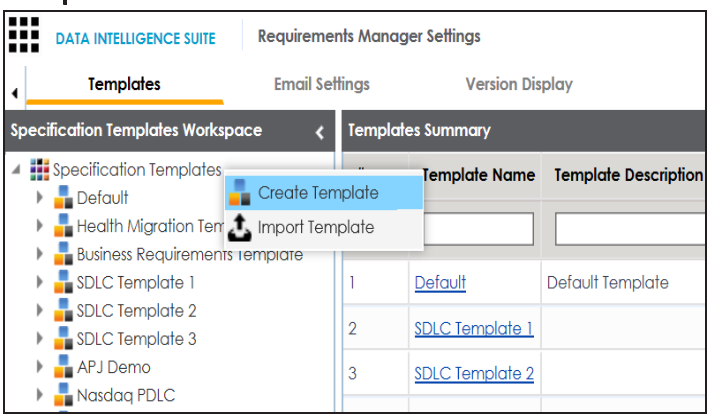
You can create your own customized templates and use these templates in creating specifications.

To create new templates, follow these steps:

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

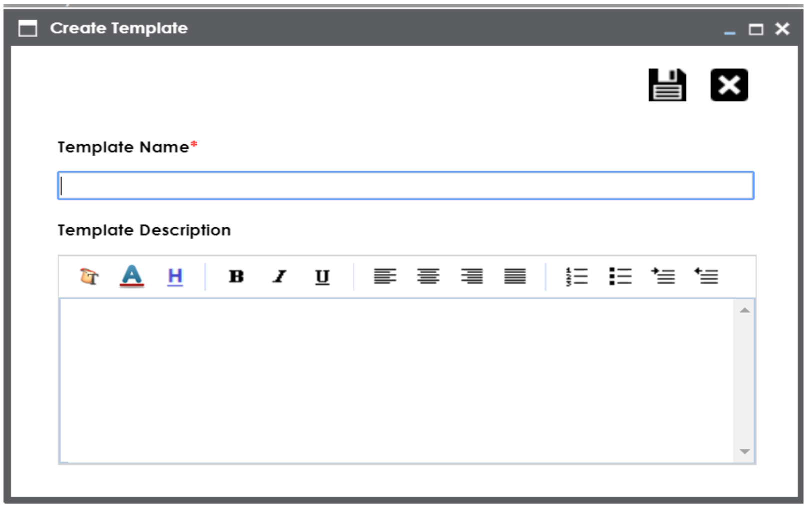
   The Requirements Manager Settings page appears. By default, the Templates tab opens.

2. Under 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 migration project.

5. Click .

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

Once a template is created, you can add artifacts to it.

Adding Artifacts to Templates

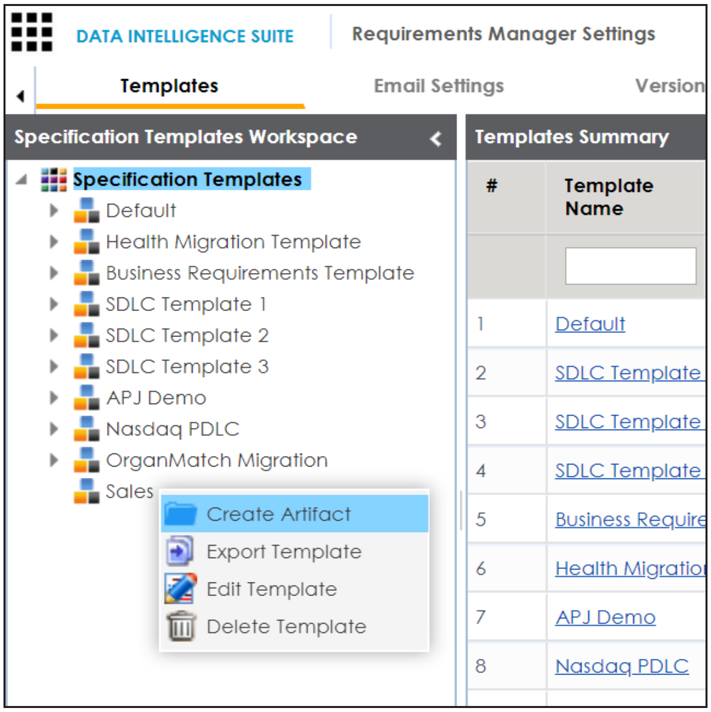
You can enrich a template by adding artifacts to the template.

Enriching templates involves:

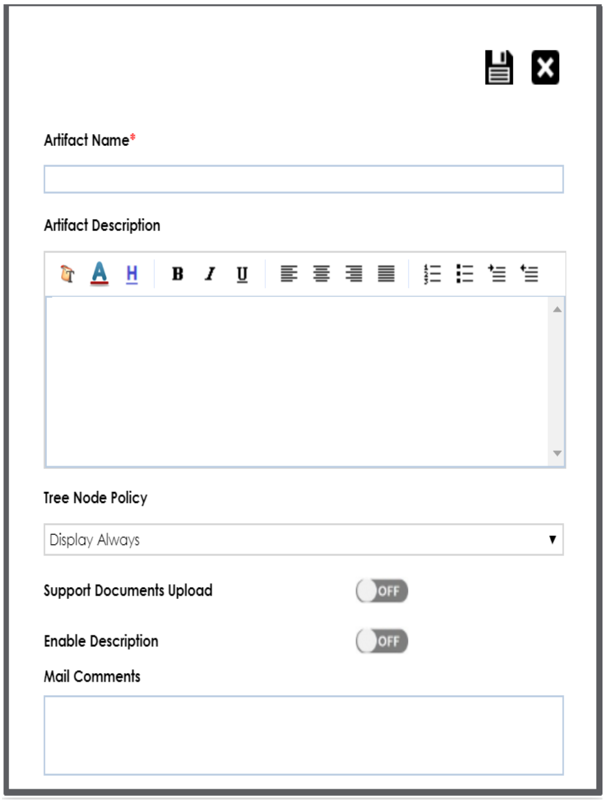
1. Adding multiple artifacts to templates
2. Adding multiple sub-artifacts to an artifact

To add artifacts to templates, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Requirements Manager**.
2. Under the **Specification Templates Workspace** pane, right-click the required template.



3. Click **Create Artifact**.



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
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	You can use this option to configure artifact visibility in an artifact tree in the Requirements Manager. Select an appropriate Tree Node Policy for the artifact: ▪ **Display Always** Displays the artifact in the artifact tree.

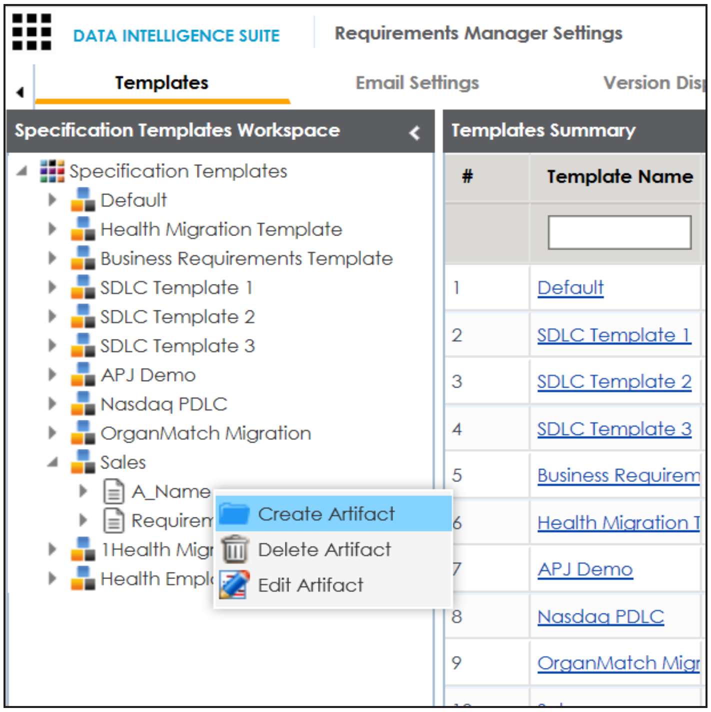
Field Name	Description
	▪ **Don't display for single child** Does not display the artifact in the artifact tree. ▪ **Display on multiple child nodes** Displays artifacts when it has more than one child artifacts.
Support Documents Upload	Specifies whether documents can be uploaded for the child artifacts. Switch **Support Documents Upload** to **ON** to enable uploading of documents for the child artifacts.
Enable Description	Specifies whether description can be entered for the child artifacts. Switch **Enable Description** to **ON** to enable entry of description for the child artifacts.
Mail Comments	Specifies the mail comments which are sent to the 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.

5. Click .

   The artifact is created and added to the template.

To add sub-artifacts to artifacts, follow these steps:

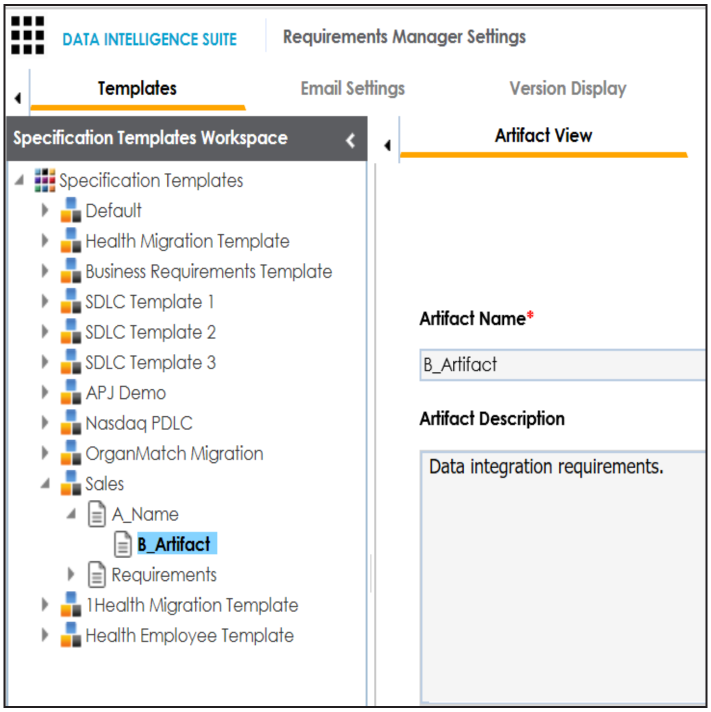
1. Right-click the required artifact and click **Create Artifact**.



The Create Artifact page appears.

2. Enter the required fields and click .

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



Once you have added an artifact to a template, you can create your own custom forms for the artifact.

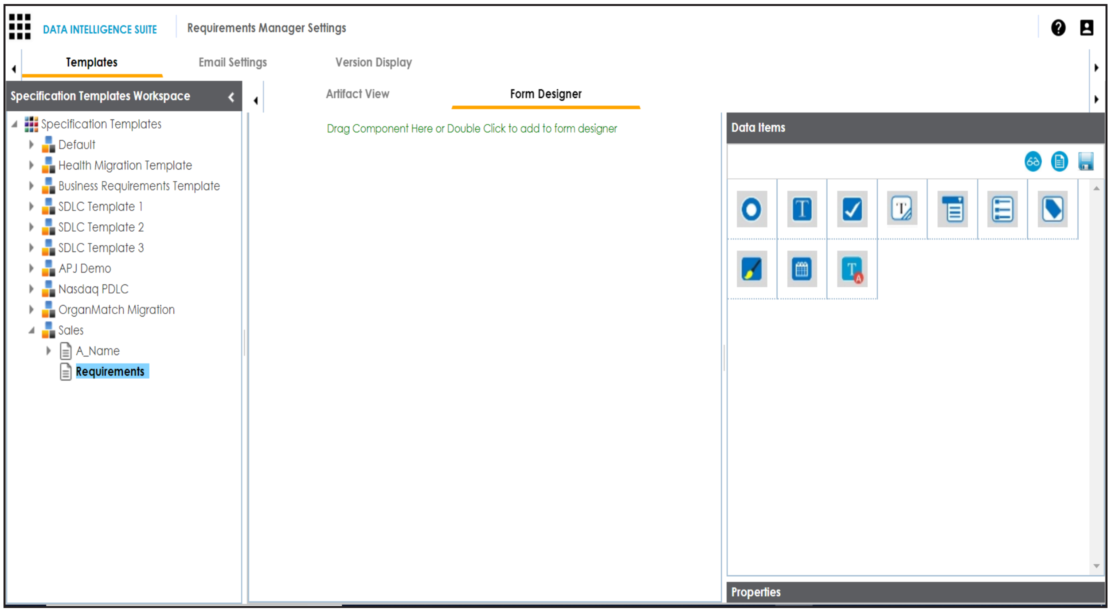
Designing Forms

You can design a custom form for an artifact. The custom form will be available in all the child artifacts of the artifact.

To design your own custom forms, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Requirements Manager**.
2. Under the **Specification Templates Workspace** pane, click the required artifact.

3. Click the **Form Designer** tab.

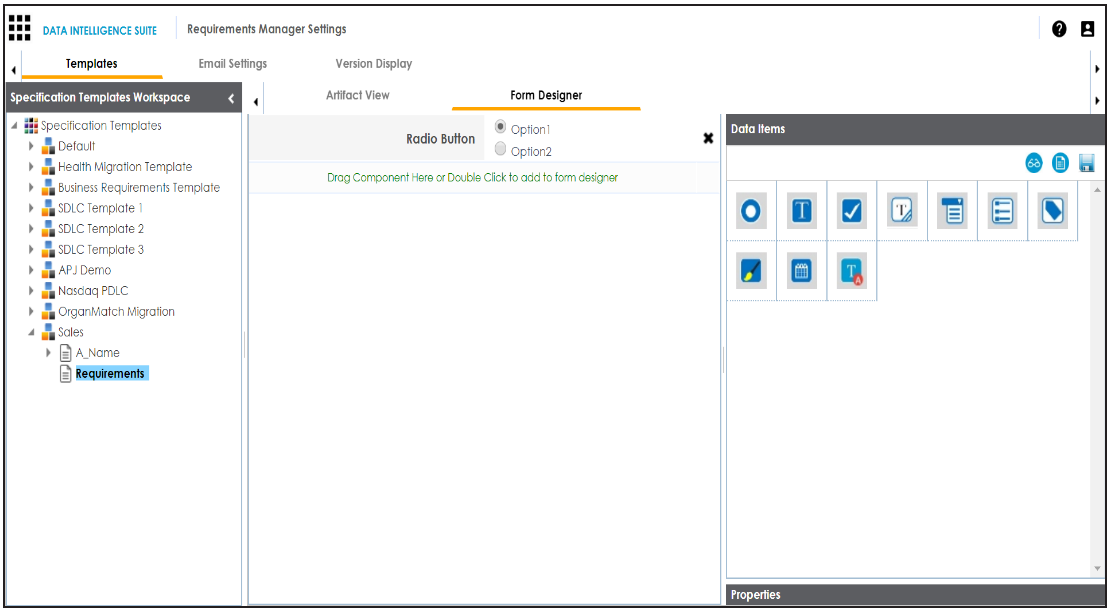


The Form Designer tab contains the following sections

- **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.

4. Double-click or drag and drop the required UI elements from the Data Item pane to the form designing space.

5. Select UI elements, one at a time, and configure their properties in the Properties pane.



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

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 information of this field. For example, Status.
Type	Specifies the type of form field. For example, Combo Box. Double-click the corresponding value cell to select an option.
Visible	Specifies whether the field is visible in the form. Select the **Visible** check box to make the field visible in the form.
Enabled	Specifies whether the field is enabled in the form. Select the **Enabled** check box to make the field enabled in the form.
Mandatory	Specifies whether the field is mandatory in the form.

Property	Description
	Select the **Mandatory** check box to make the field mandatory in 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 text style of the field. Click [...] to select a text style.
Control Style	Specifies the text style. Click [...] to select a 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 more control option and define values.

6. Use to control:

   Form Label Width

   It enables you to modify width of the label in % specific to window.

   Form Control Width

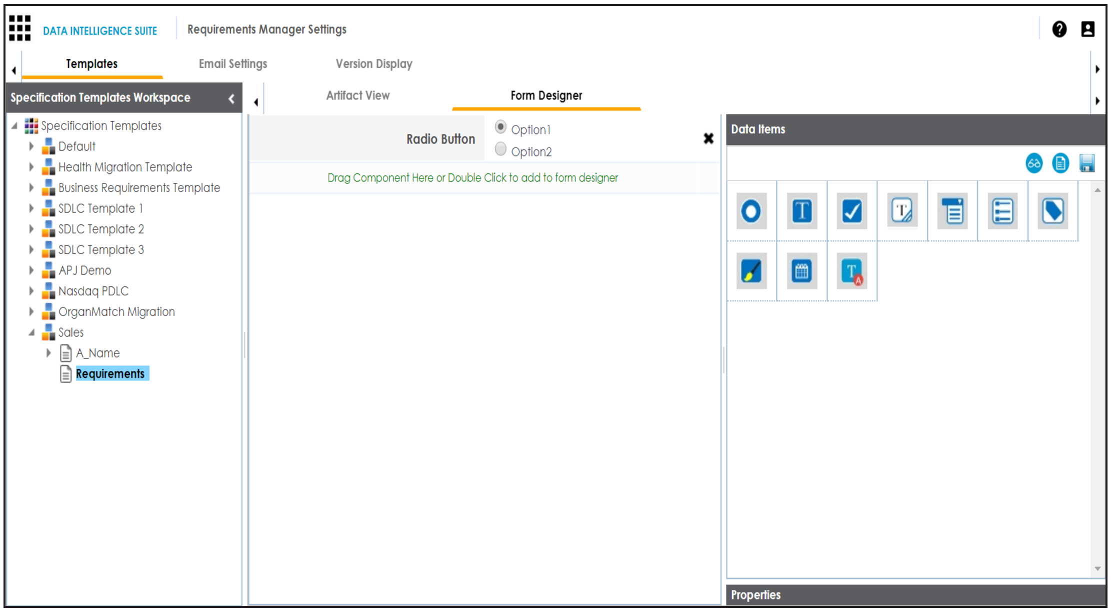
   It enables you to modify width of the control option in % specific to window.

7. Click to preview.
8. Click .

The Master Template Option is saved.

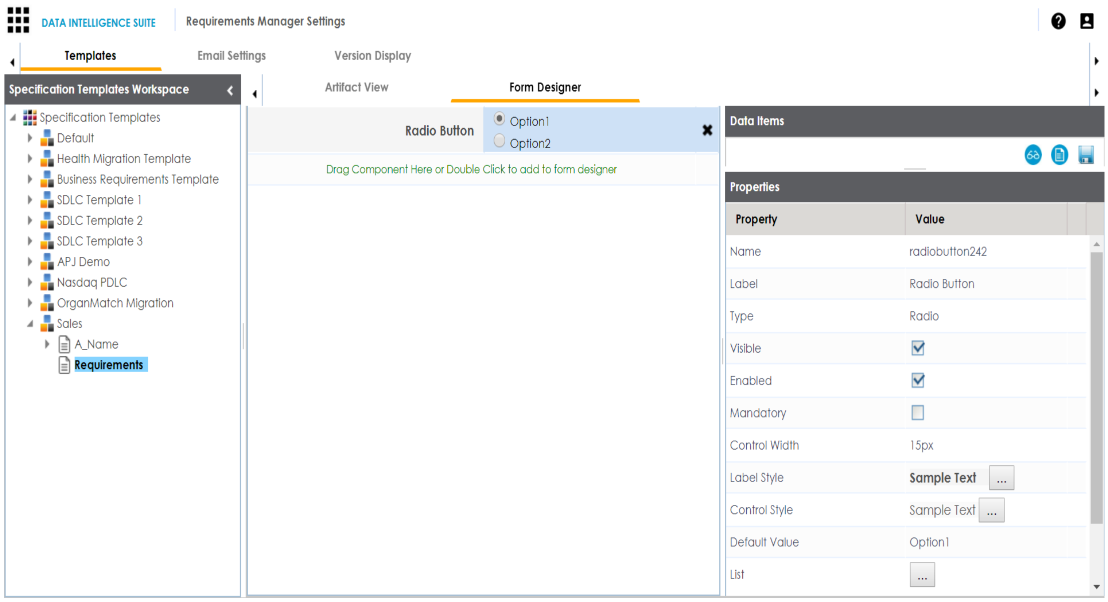
Take an example of radio button:

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



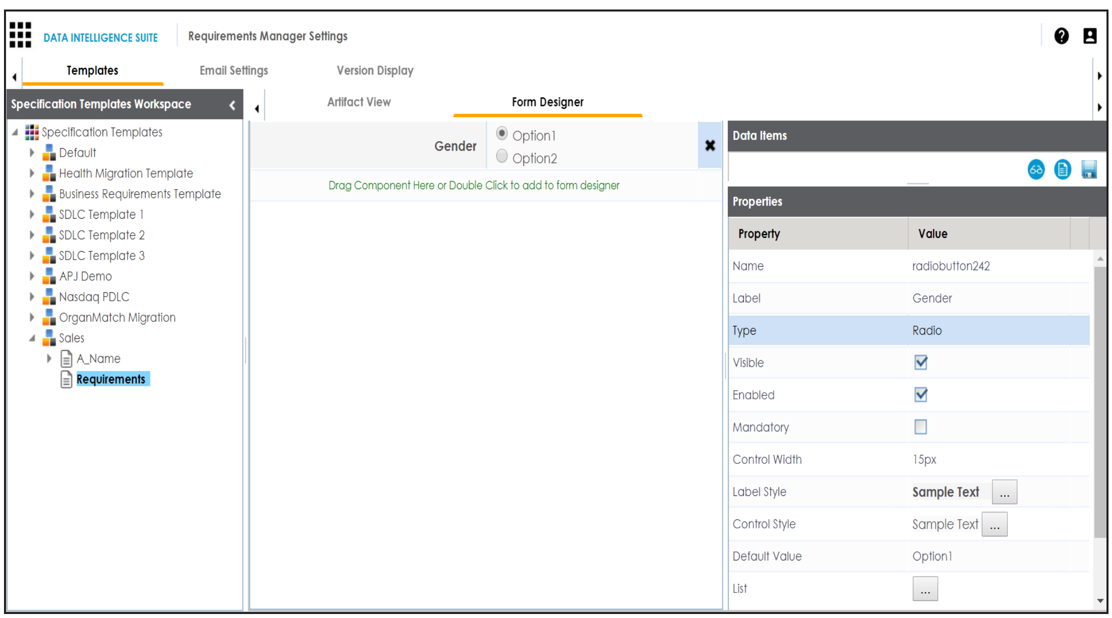
2. Click the cell containing Option 1.

   You can view the properties of the data item.

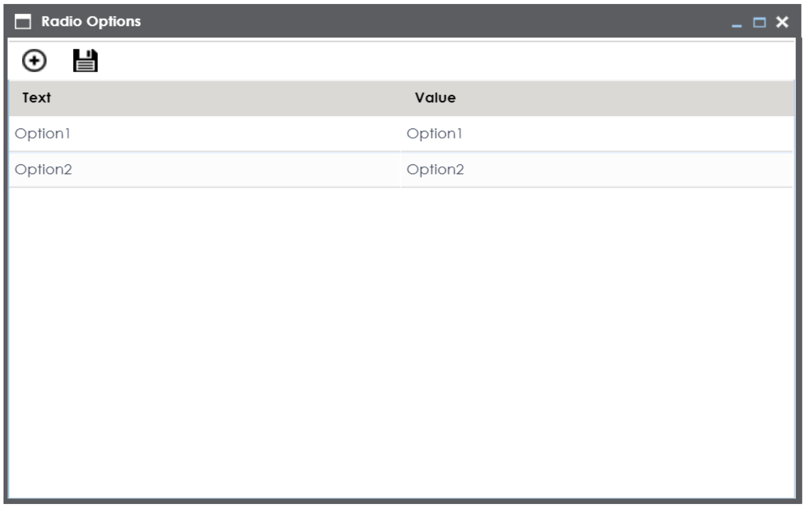


3. Double-click the **Value** cell corresponding to **Label** and edit it to change the Label.

   For example, we changed it to Gender and the form appears as shown below.

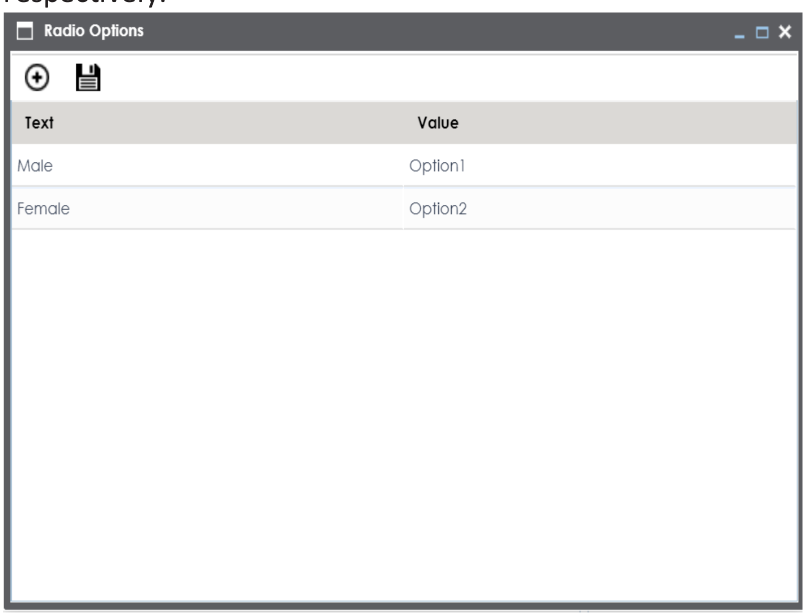


4. Click against the **List** to edit radio options.



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

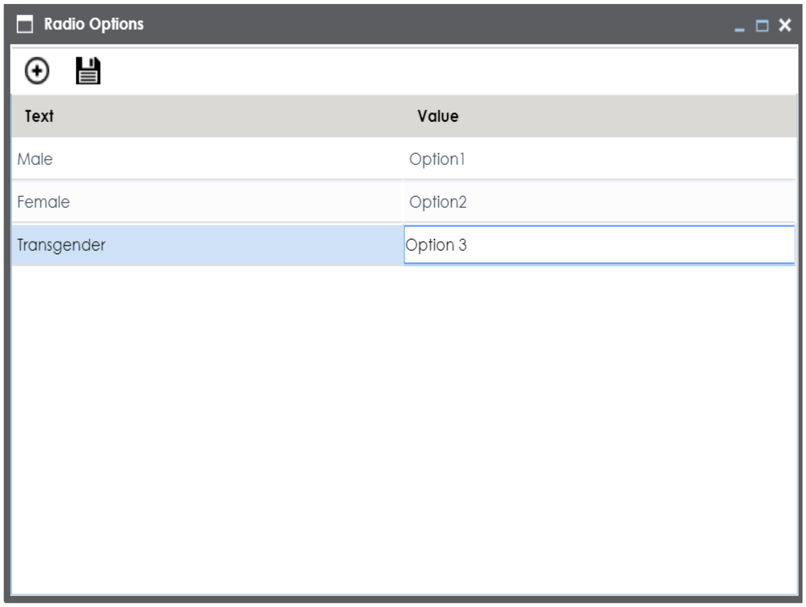
   We edited Option 1 text and Option 2 text and entered Male, and Female respectively.



6. Click to add more options.

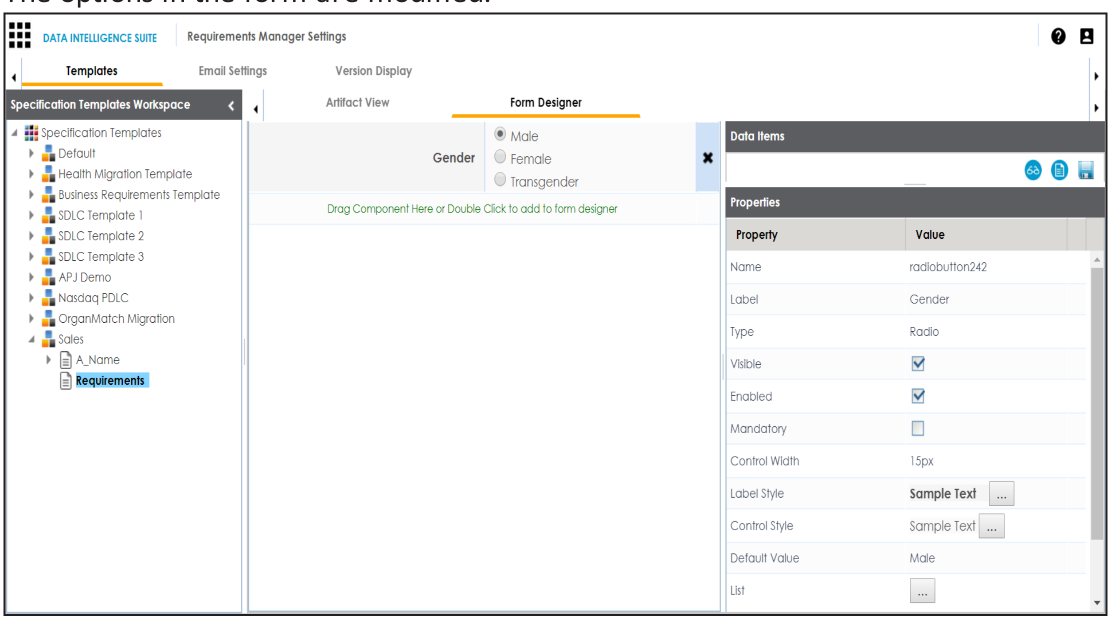
One row is added.

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.

10. Click to preview.

    The Preview Window appears.

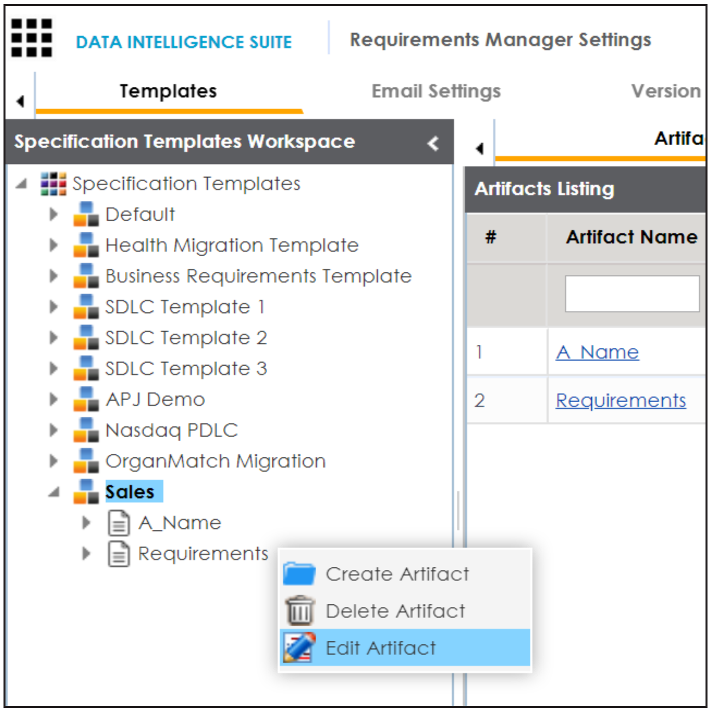
Managing Artifacts

Managing artifacts involves:

- Editing artifacts
- Deleting artifacts

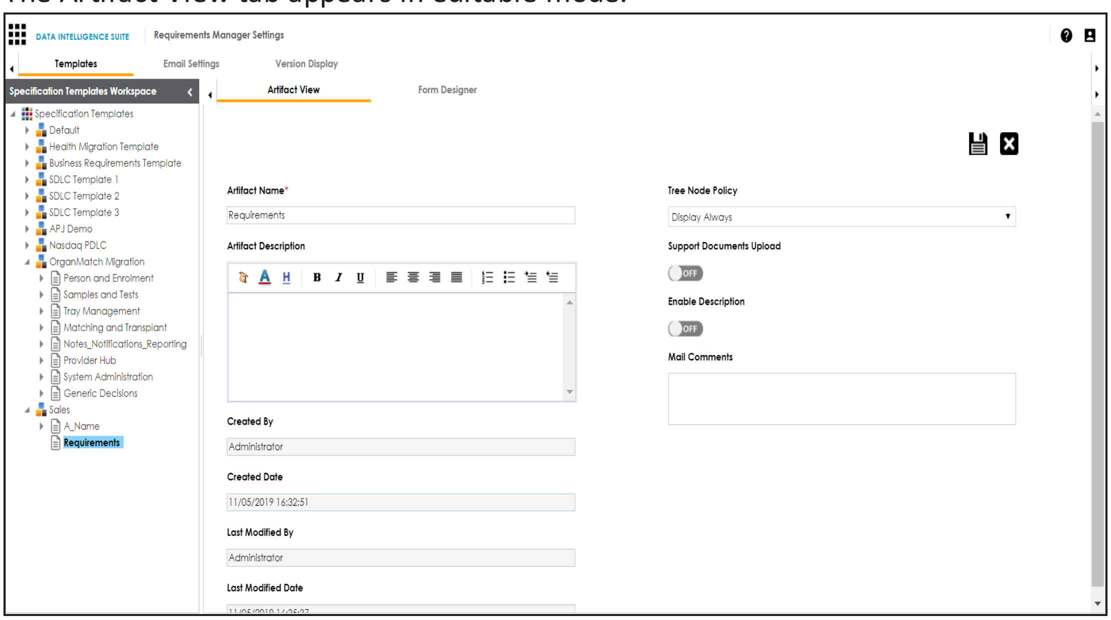
To edit artifacts, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Requirements Manager** > **Templates**.
2. Under the **Specification Templates Workspace** pane, right-click the required artifact.



3. Click **Edit Artifact**.

   The Artifact View tab appears in editable mode.



4. Edit the fields on the Artifact View tab.

5. Click .

   The fields are updated.

To delete artifacts, follow these steps:

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

   A warning message appears.
3. Click **Yes** to delete the artifact.

   Note: Deleting an artifact removes all the associated artifacts and specification artifacts.

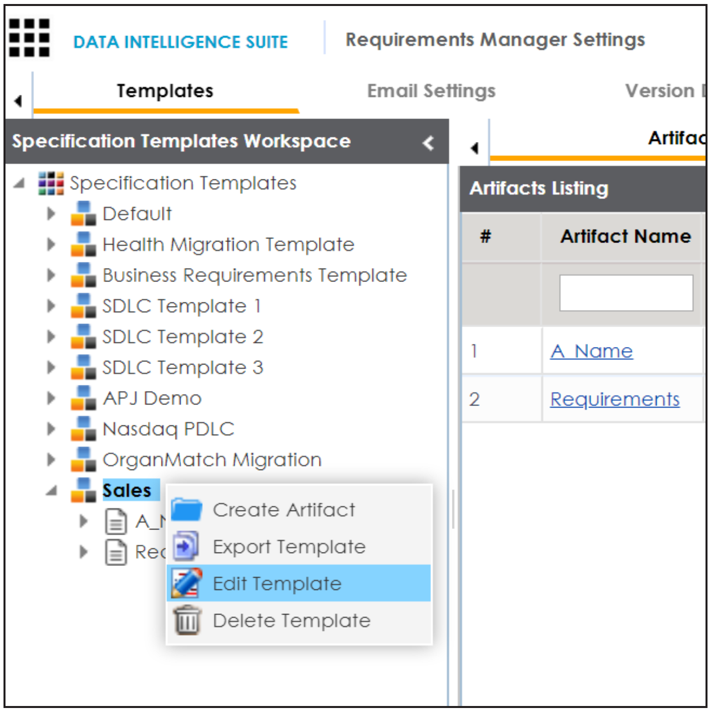
Managing Templates

Managing templates involves:

- Exporting templates
- Editing templates
- Deleting templates

To manage templates, follow these steps:

1. Right-click a template to view template 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

Note: Specification artifact is also called as child artifact.

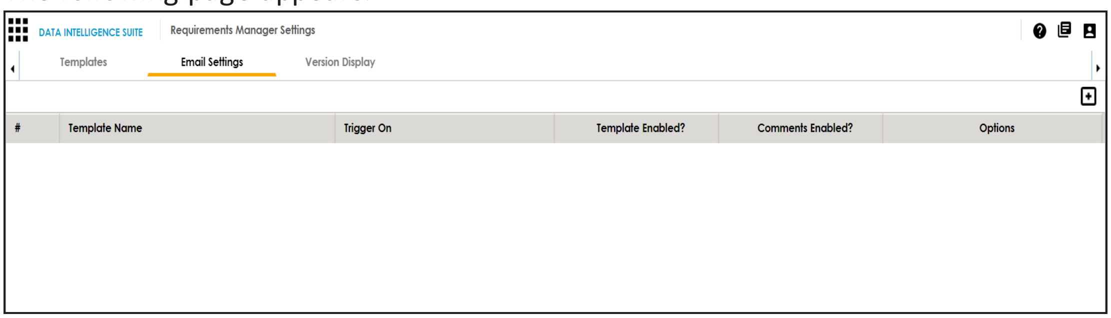
The actions can be Add, Delete, Edit, Version, or Copy. For each object-action combination, you can configure a custom email template.

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:

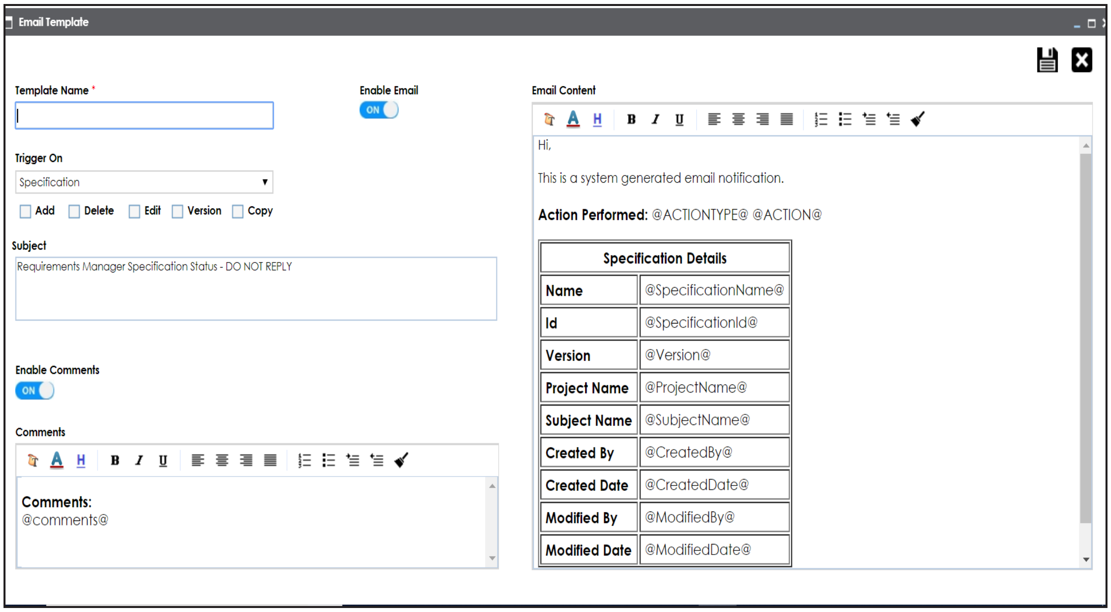
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Requirements Manager**
2. Click the **Email Settings** tab.

   The following page appears.

3. Click .

   The Email Template page appears.



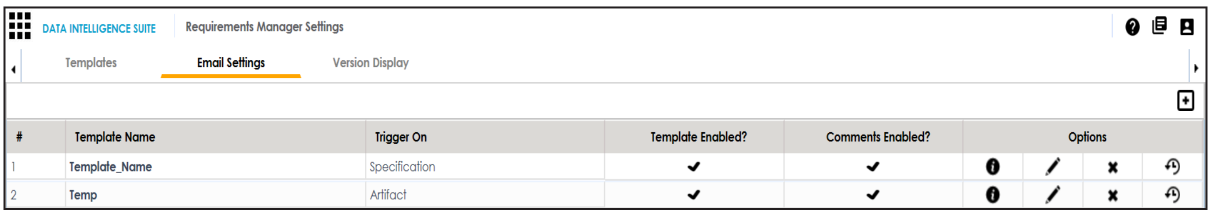
4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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. **Note**: Version and Copy actions are available only for Specification.
Enable Email	Switch **Enable Email** to **ON** to enable the template.
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.

Field Name	Description
	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.

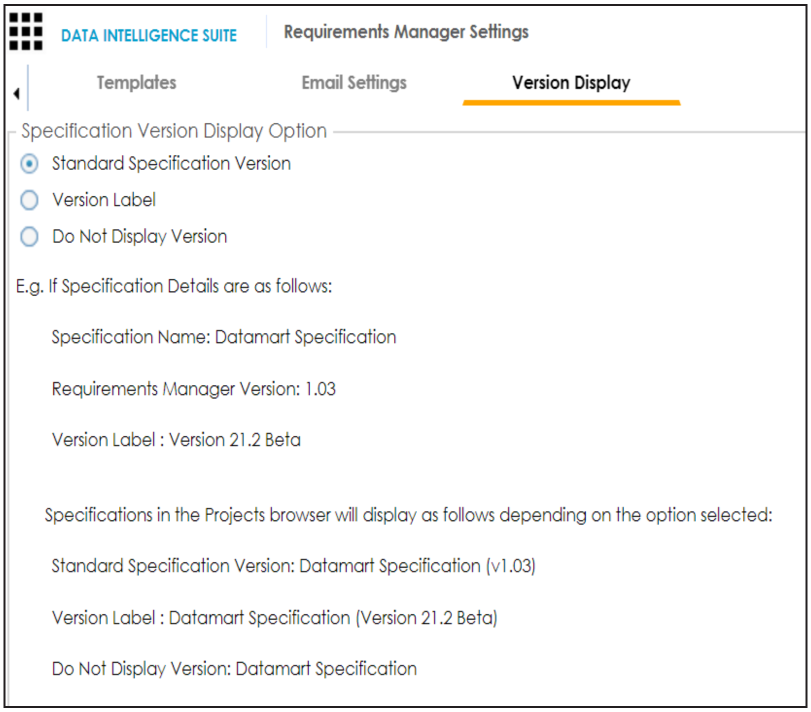
   For example, Data_Mart (erwin_Mart) where Data_Mart is the specification name and erwin_Mart is the Version Label.

   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** > **Miscellaneous** > **Settings** > **Requirements Manager**.
2. Click the **Version Display** tab.

   The following page appears.



3. Use the following options:

Standard Specification Version

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

Version Label

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

Do Not Display Version

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

Business Glossary Manager

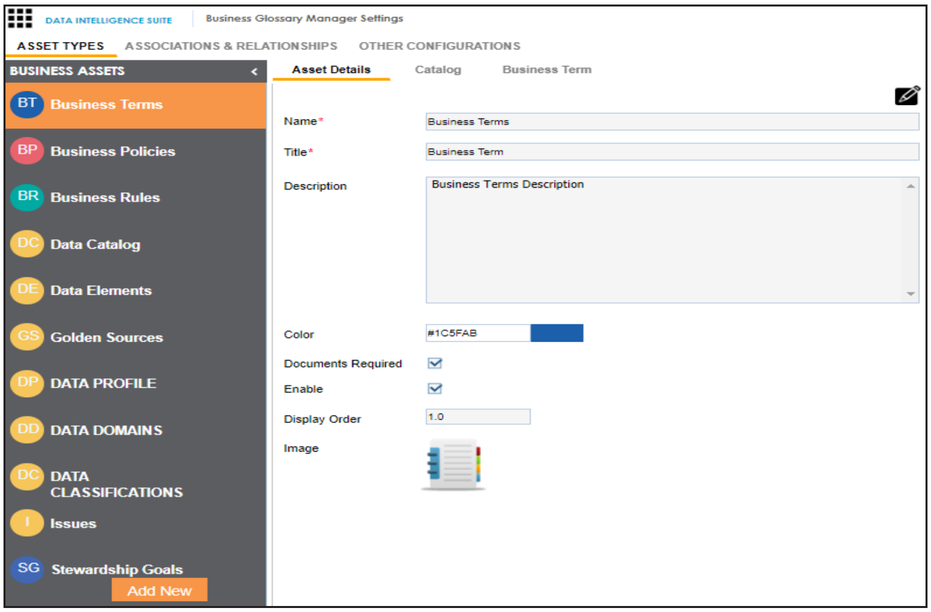
On the Business Glossary Manager Settings page, you can set up the Business Glossary Manager with respect to:

- 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. For more information, refer to the Adding Asset Types topic.

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

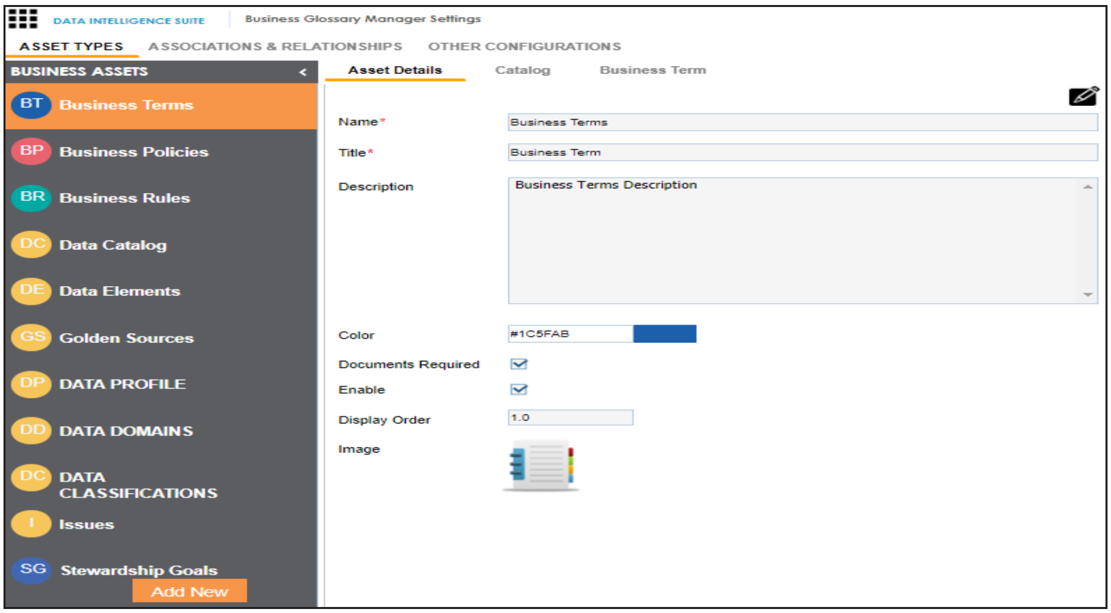


Configuring Asset Types

Asset types are the glossary objects (business terms, business rules, business policy, and so on) that you work on in the Business Glossary Manager. For each of the asset types, you can configure several settings, such as their availability, properties, and so on.

To configure asset types, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **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 an asset type.
   The corresponding settings appear in the right pane. These settings are grouped into three different tabs, Asset Details, Catalog or Category, and <Asset Name>. However, the tabs differ based on the asset type that you select.

3. Work on each tab to configure asset types:

   - **Asset Details**: Use this tab to configure basics of the asset. For example, name, description, and appearance. For more information, refer to the Configuring Asset Details topic.

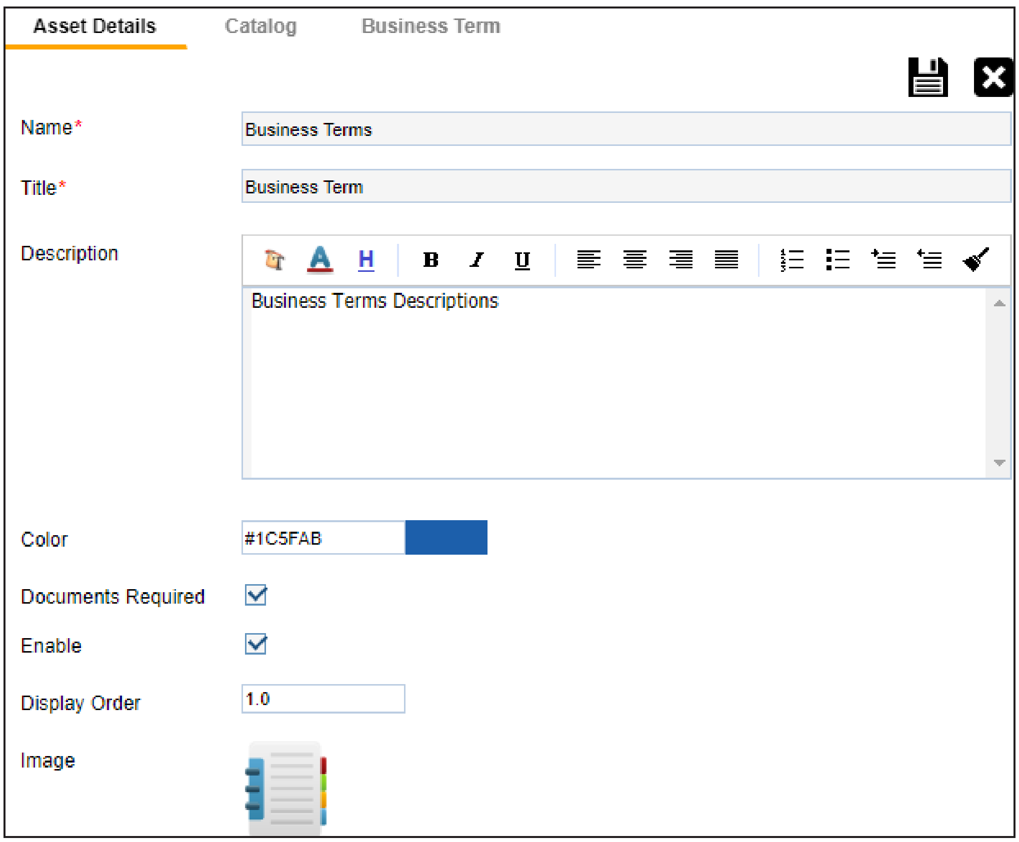
- **Catalog or Category**: Use this tab to set up a form for asset type container. For example, a catalog or category. For more information, refer to the Configuring Catalog Form topic.
- **<Asset Name>**: Use this tab to set up a form for additional information of the asset. For more information, refer to the Configuring Asset Form topic.

Configuring Asset Details

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

To configure asset details, follow these steps:

1. On the Asset Details tab, click .



2. Edit the settings appropriately.
   Note: For Business Terms, Business Policies, and Business Rules, the following settings

are not editable:

- Name
- Title
- Documents Required
- Enable
- Image

Refer to the following table for field descriptions:

Field Name	Description
Name	Enter a name for the asset type.
Title	Enter a name for the <Asset Name> tab.
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.
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.

3. Click .
   The changes you made are available on the asset type creation page in the Business Glossary Manager. For more information, refer to the Using Business Glossary Manager topic.

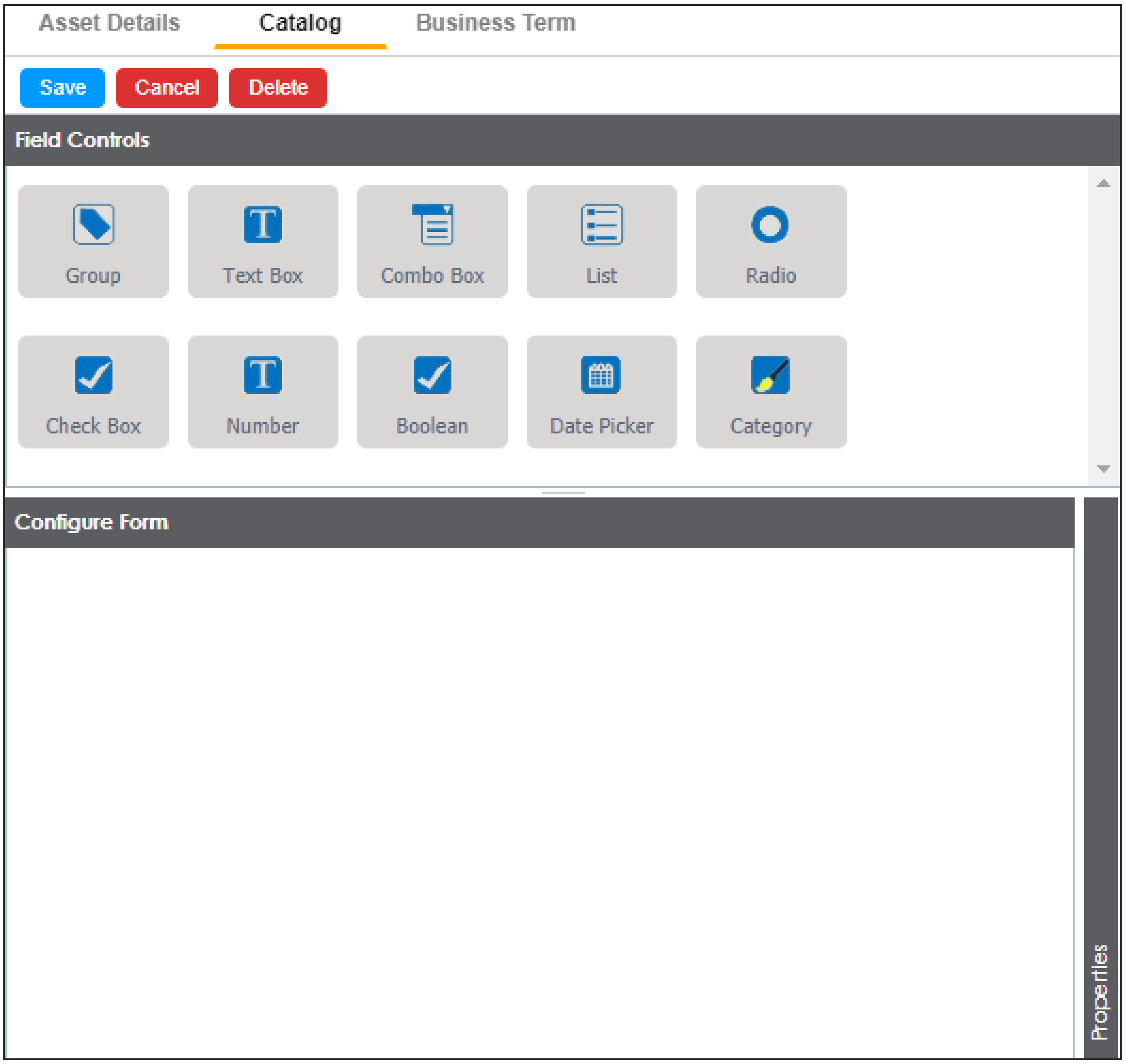
To discard your changes, click .

Configuring Catalog Form

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

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

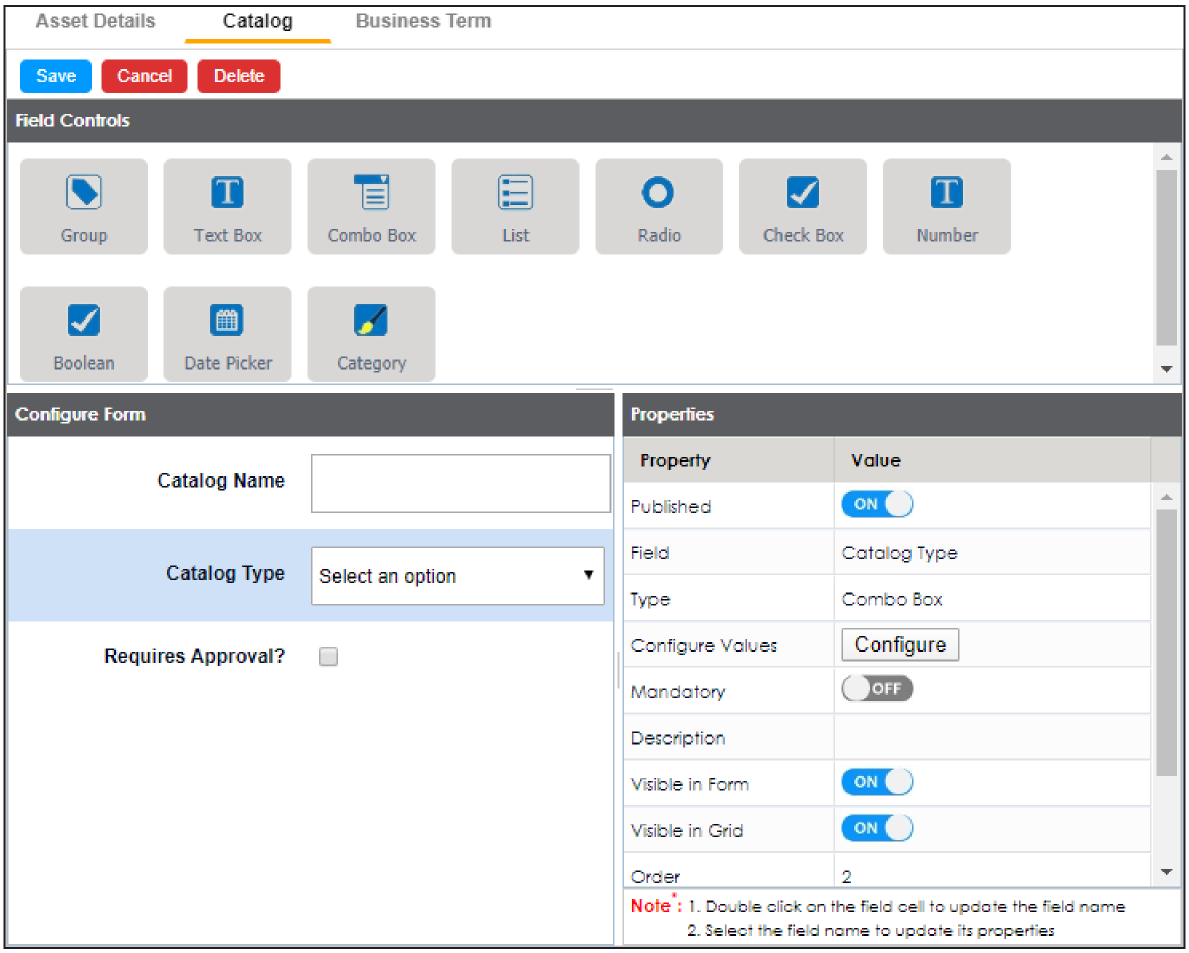
1. On the Catalog or Category tab, click **Edit**.



The Catalog or Category 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.
- **Properties**: This pane displays the properties of the UI element selected in the Configure Form pane.

2. Drag and drop the required UI elements from the Field Controls pane to the Configure Form pane.
3. Select UI elements, one at a time, and configure their properties in the Properties pane.



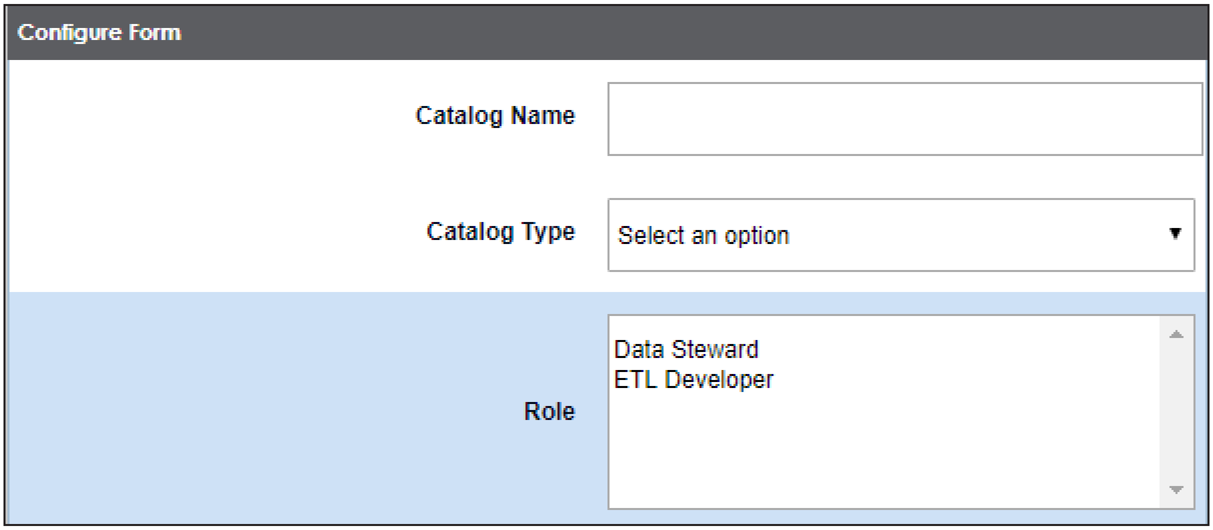
Note: The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description
Published	Set whether the element is published.
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. For example, the list available in a Combo Box. You can add custom values or select the data available in your environment.
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	Select whether the element in displayed on the catalog or category creation page.
Visible in Grid	
Order	Set the position at which the element appears on the catalog or category creation page. For example, if there are four elements on the page and the selected element must appear as the third element, set the order to 3.

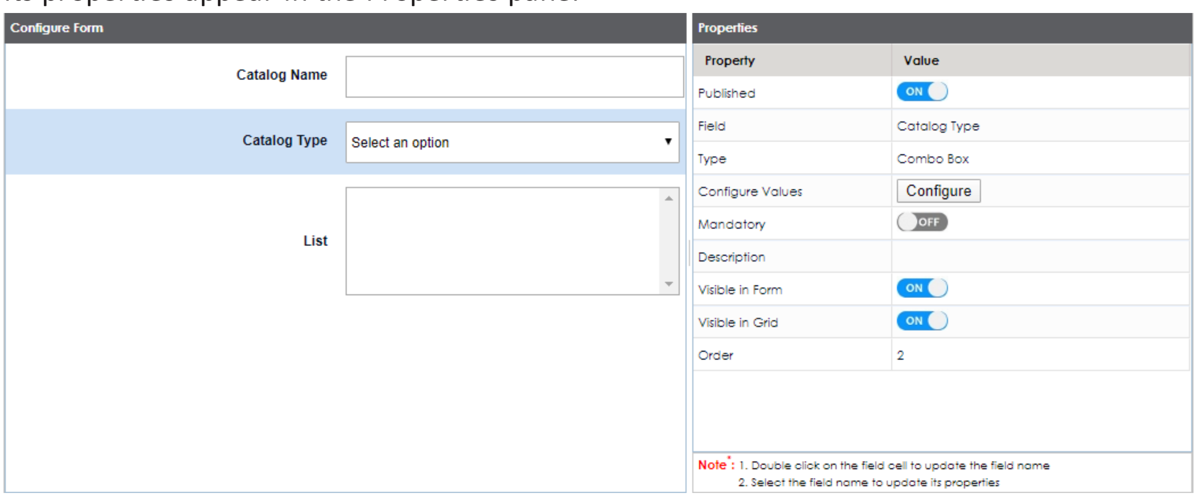
4. Once, you have designed the form and configured the properties of all the UI elements, click **Save**.
   The changes you made are available on the catalog or category creation page in the Business Glossary Manager. For more information on creating catalogs, refer to the Creating Catalogs topic.

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



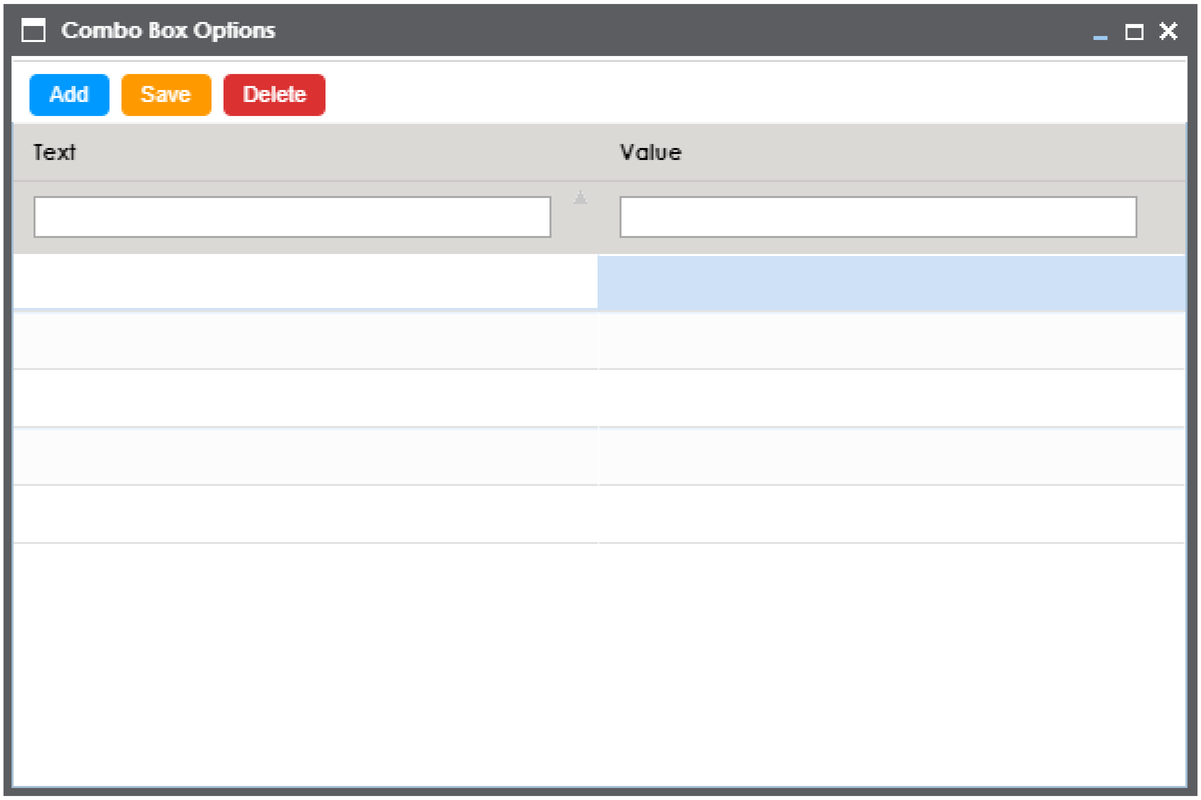
To understand property configuration, for example, follow these steps to configure the Catalog Type combo box:

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



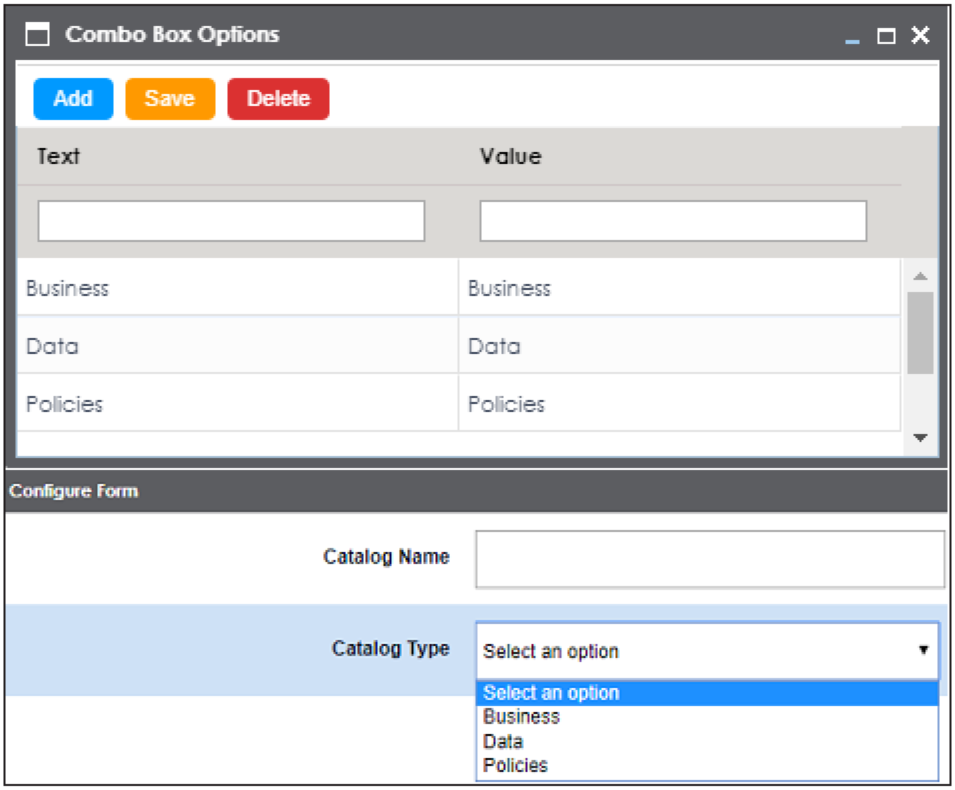
2. Click **Configure**.
   The Combo Box Options page appears. Use this page to add items to the Catalog Type

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

list.

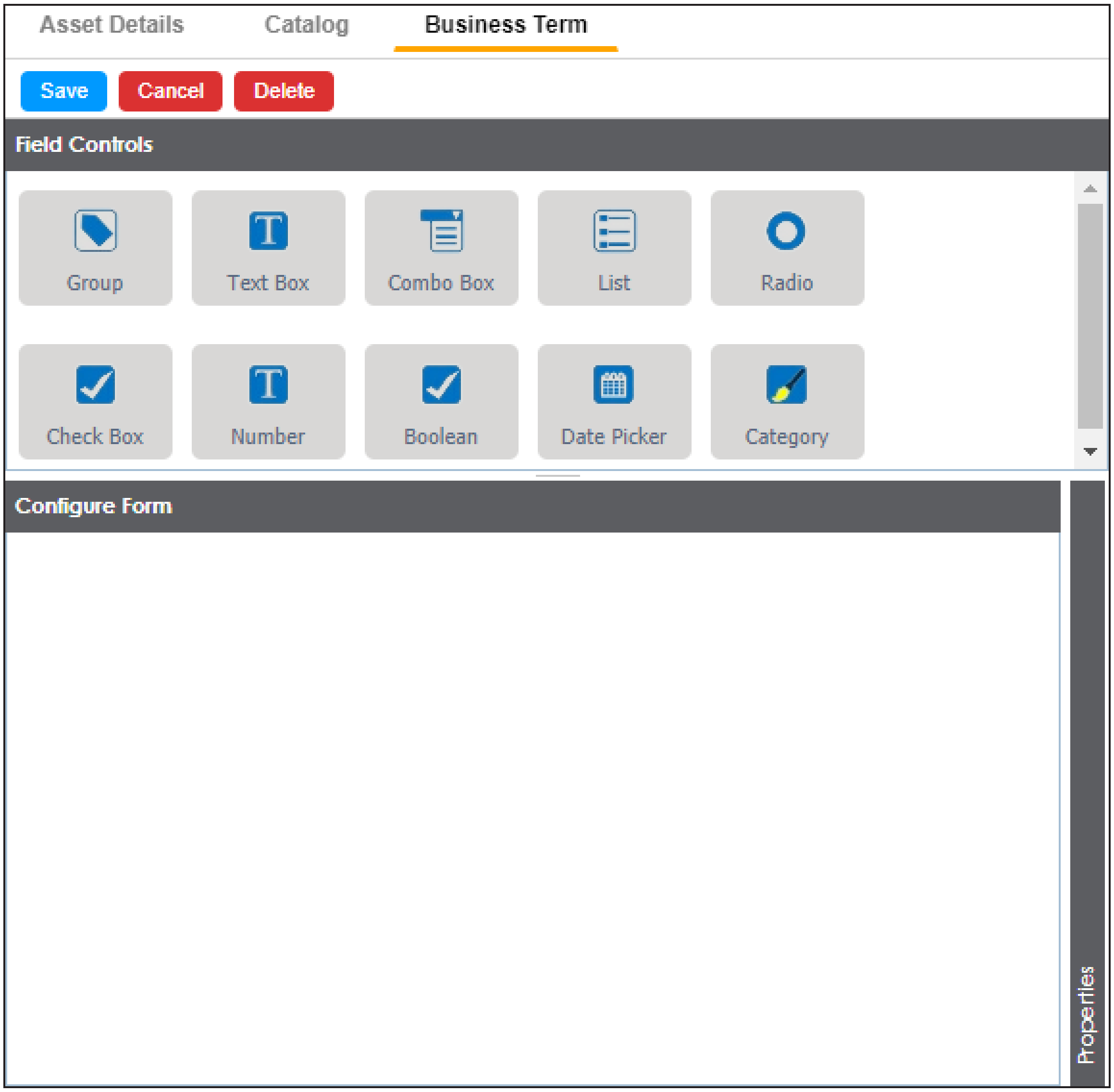


Configuring Asset Form

Assets are the glossary objects (business terms, business rules, business policy, and so on) that you work on in the Business Glossary Manager. 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.

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

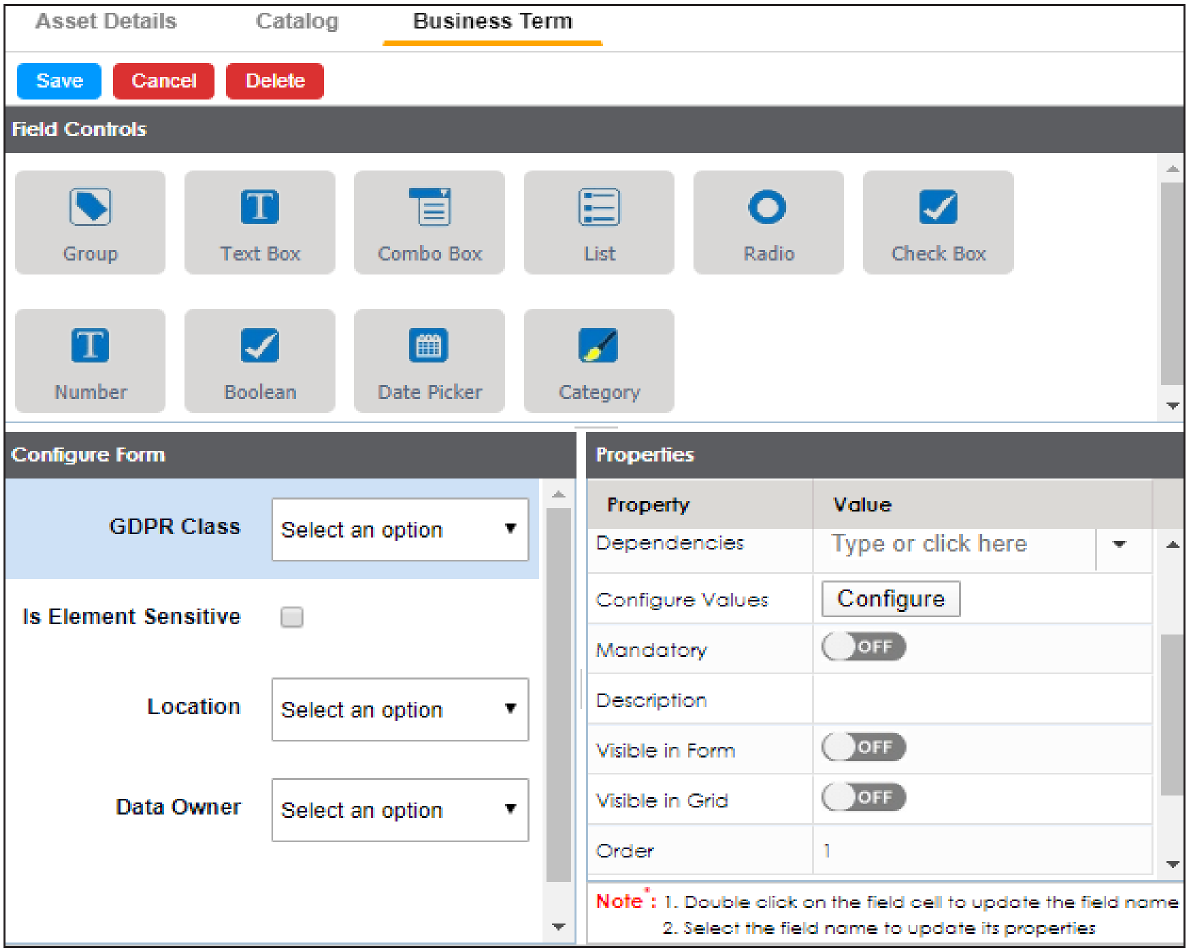
1. On the <Asset Name> tab, click **Edit**.
   For example, click **Edit** on the Business Term tab.



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.
- **Properties**: This pane displays the properties of the UI element selected in the Configure Form pane.

2. Drag and drop the required UI elements from the Field Controls pane to the Configure Form pane.
3. Select UI elements, one at a time, and configure their properties in the Properties pane.



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

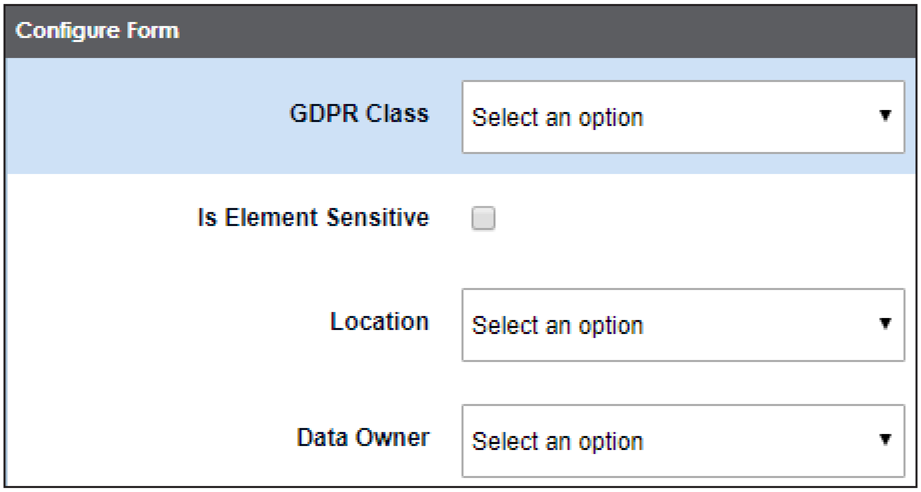
Refer to the following table for property descriptions:

Property	Description
Published	Set whether the element is published.
Field	Set the element label.
Type	Select the element type. By default, it is set to the element that you

Property	Description
	added. However, you can change the type using this property.
Dependencies	Some elements depend on the values of other elements on the form. Select the elements on which your element depends. This property is available for List, Radio, Boolean, and Date Picker elements.
Configure Values	Click to configure the possible values available in an element. For example, the list available in a Combo Box. You can add custom values or select the data available in your environment.
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	Select whether the element in displayed on the catalog or category creation page.
Visible in Grid	
Order	Set the position at which the element appears on the catalog or category creation page. 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.

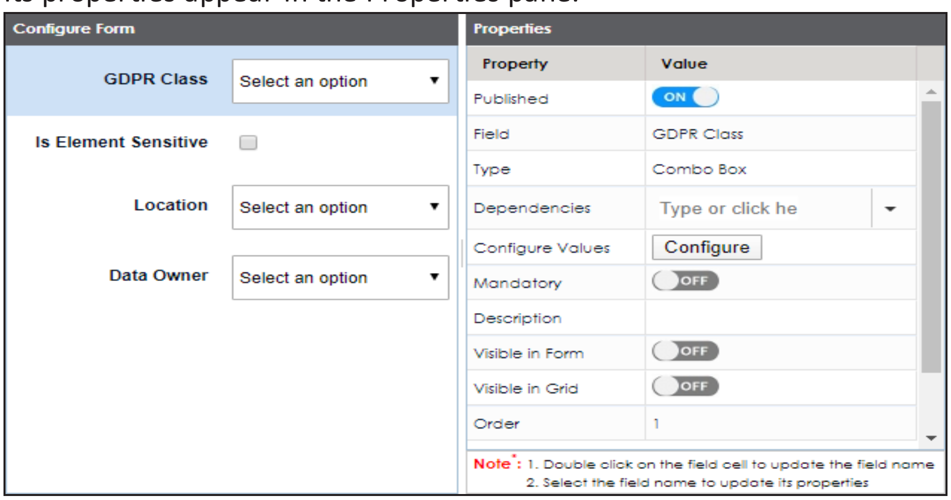
4. Once, you have designed the form and configured the properties of all the UI elements, click **Save**.
   The changes you made are available on the asset creation page in the Business Glossary Manager. For more information in creating glossary objects, refer to the Using Business Glossary Manager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

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



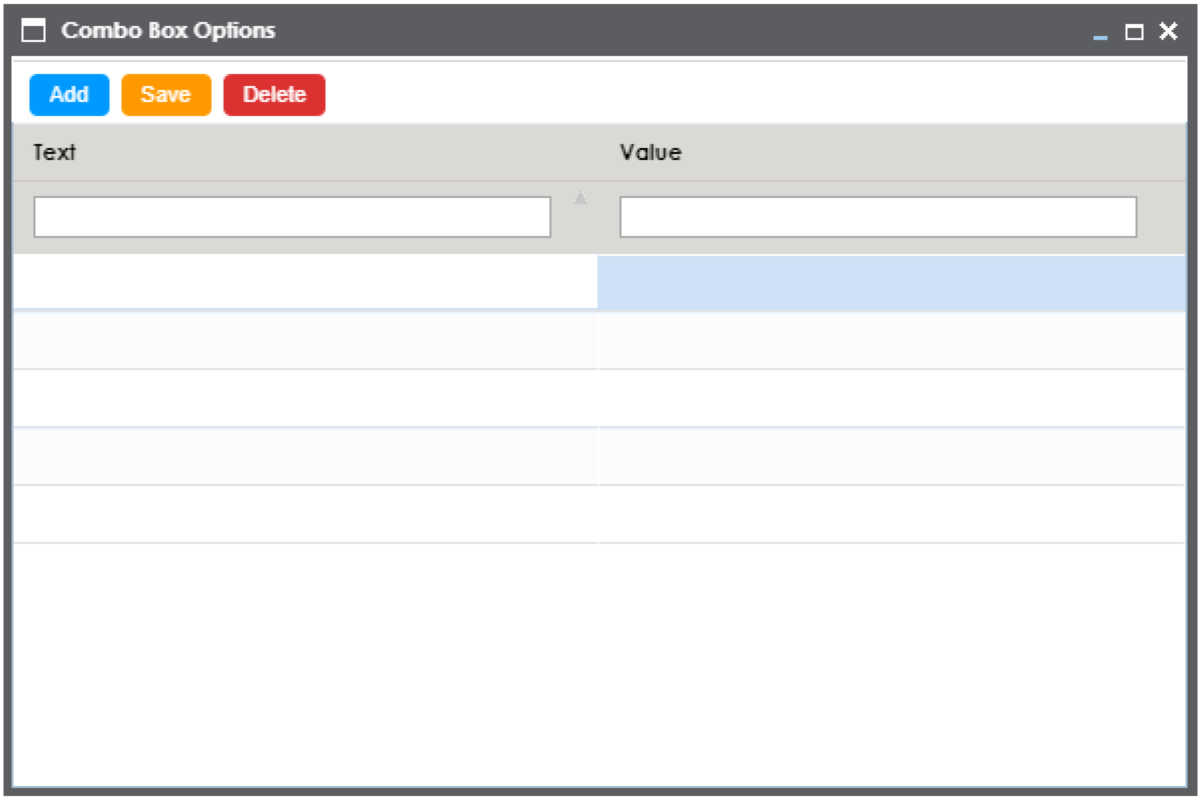
To understand property configuration, for example, follow these steps to configure the GDPR Class combo box:

1. Select the GDPR Class 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

list.

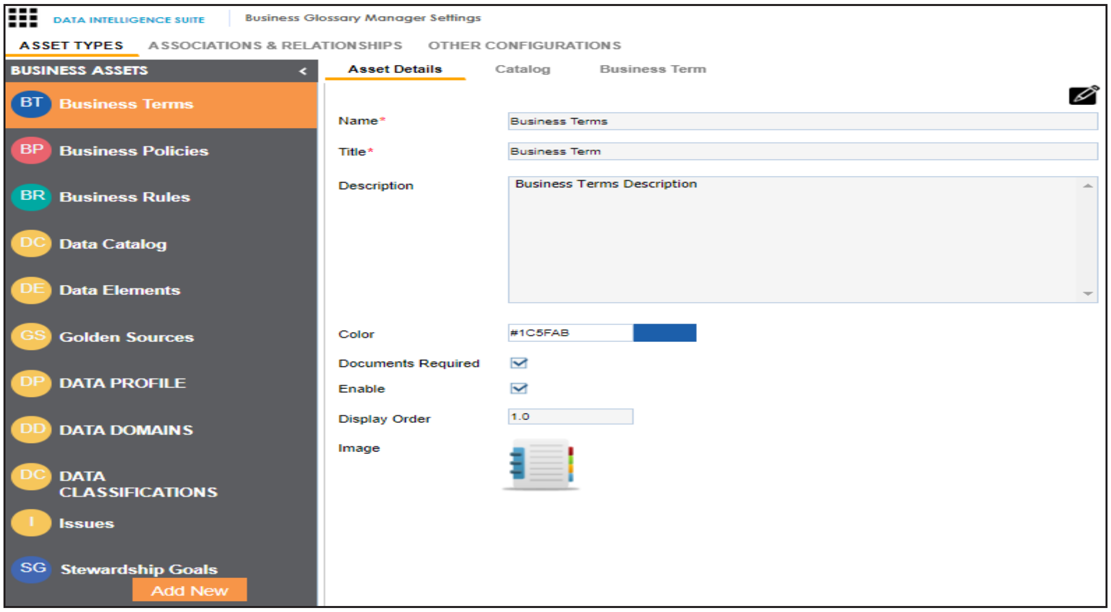
Adding Asset Types

Based on your organizations requirements, you can create custom asset types to supplement the default asset types (Business Term, Business Policy, and Business Rule) available in the Business Glossary Manager.

To add custom asset types, follow these steps:

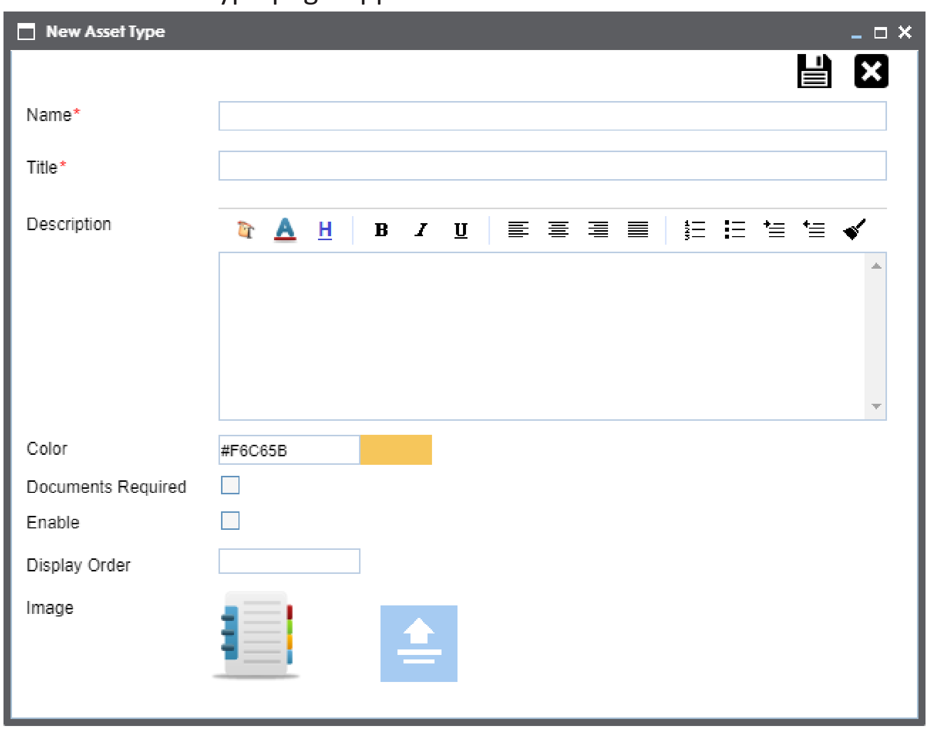
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Business Glossary Manager**. The Business Glossary Manager Settings page appears. By default, it opens the ASSET

TYPES settings.



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

   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.
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 Using Business Glossary Manager topic.

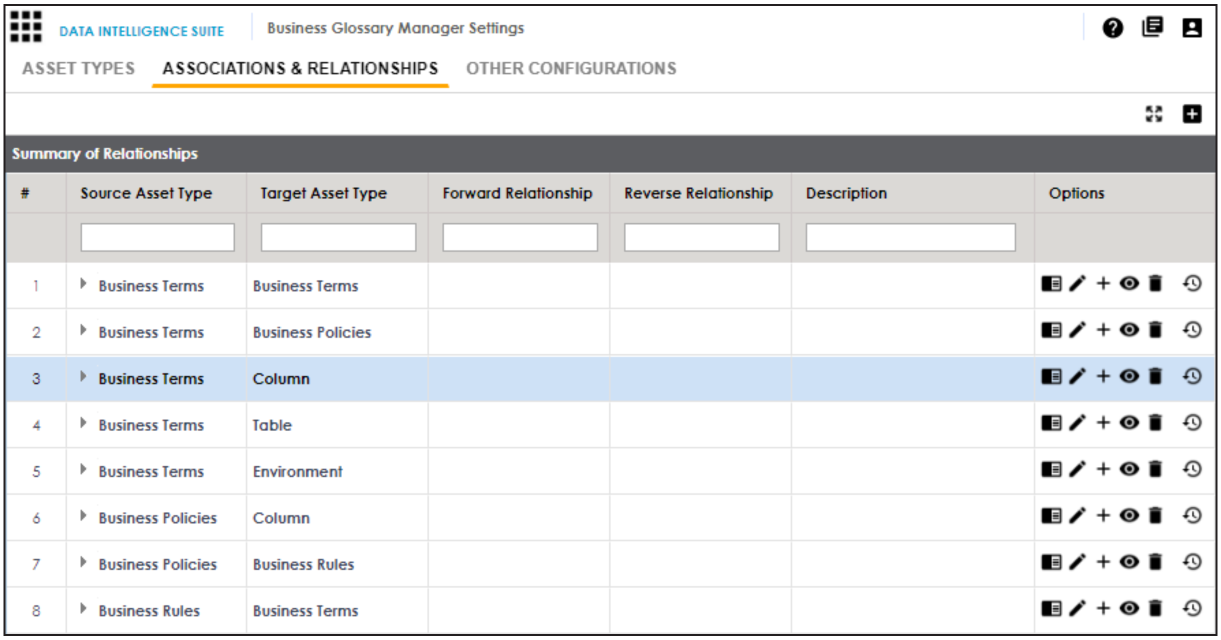
Configuring Associations and Relationships

You can associate asset types with other asset types, columns, environments, and tables to define your business glossary better. For each asset type, you can configure the objects available for association and their forward and reverse relationships.

To add associations, follow these steps:

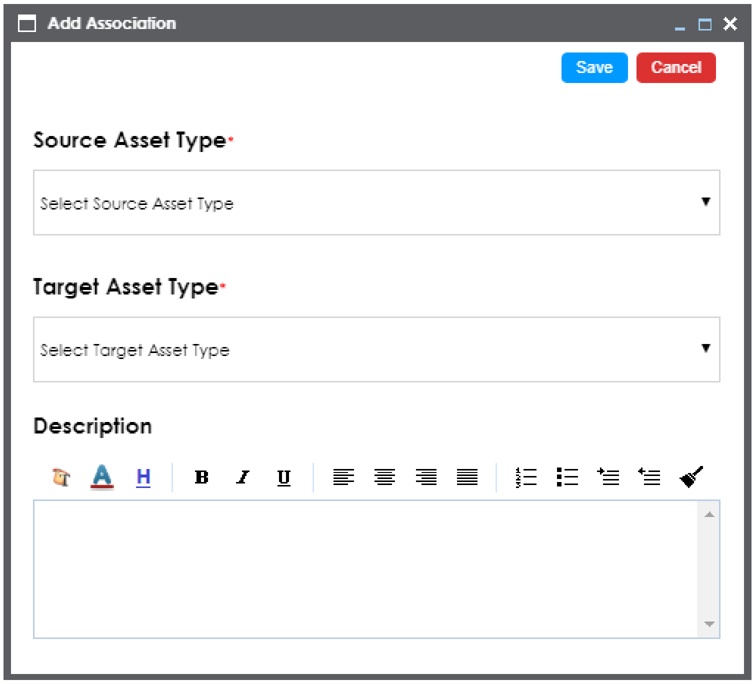
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Business Glossary Manager**. The Business Glossary Manager Settings page appears. By default, it opens the Asset Types settings.

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



3. Click .

   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.

5. Click **Save**.
   The association is 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				
3	Business Terms	Column				
4	Business Terms	Table				
5	Business Terms	Environment				
6	Business Policie	Column				
7	Business Policie	Business Rules				
8	Business Rules	Business Terms				

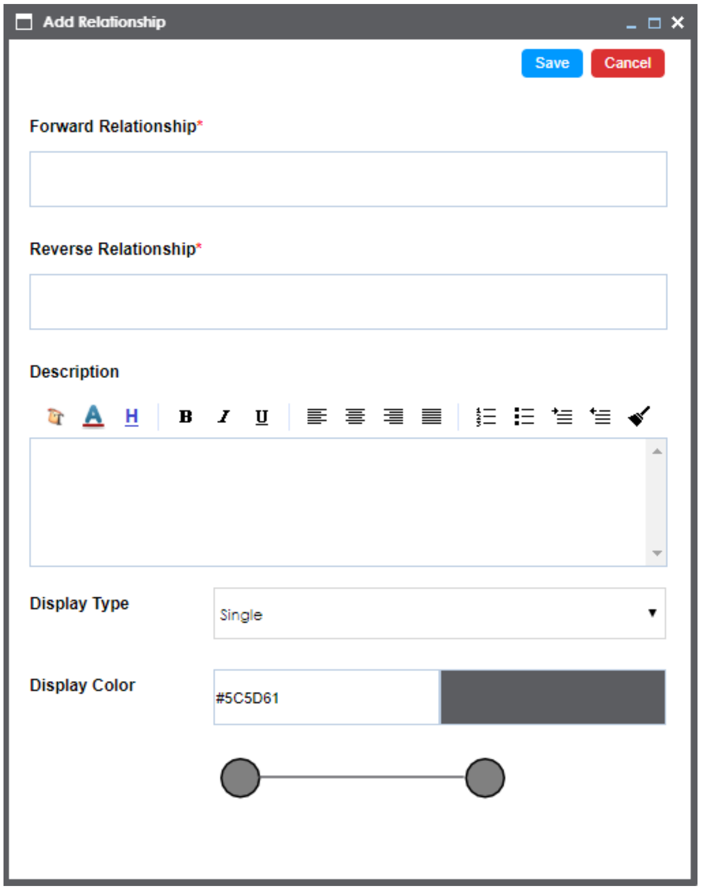
Adding Relationships

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.



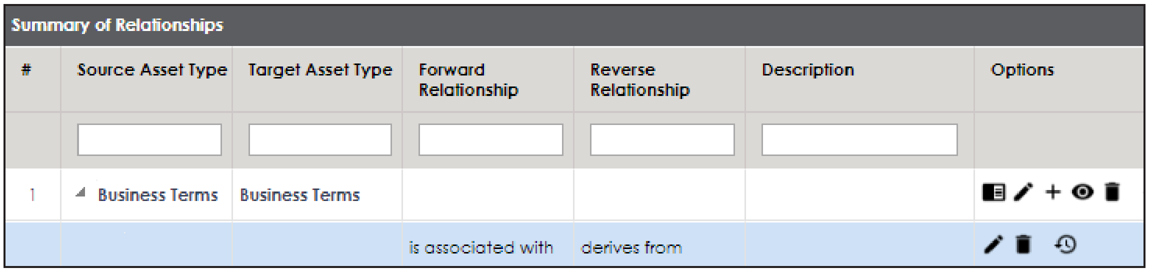
2. Select or enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.
   Refer to the following table for field descriptions.

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

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

3. Click **Save**.

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



Other Configurations

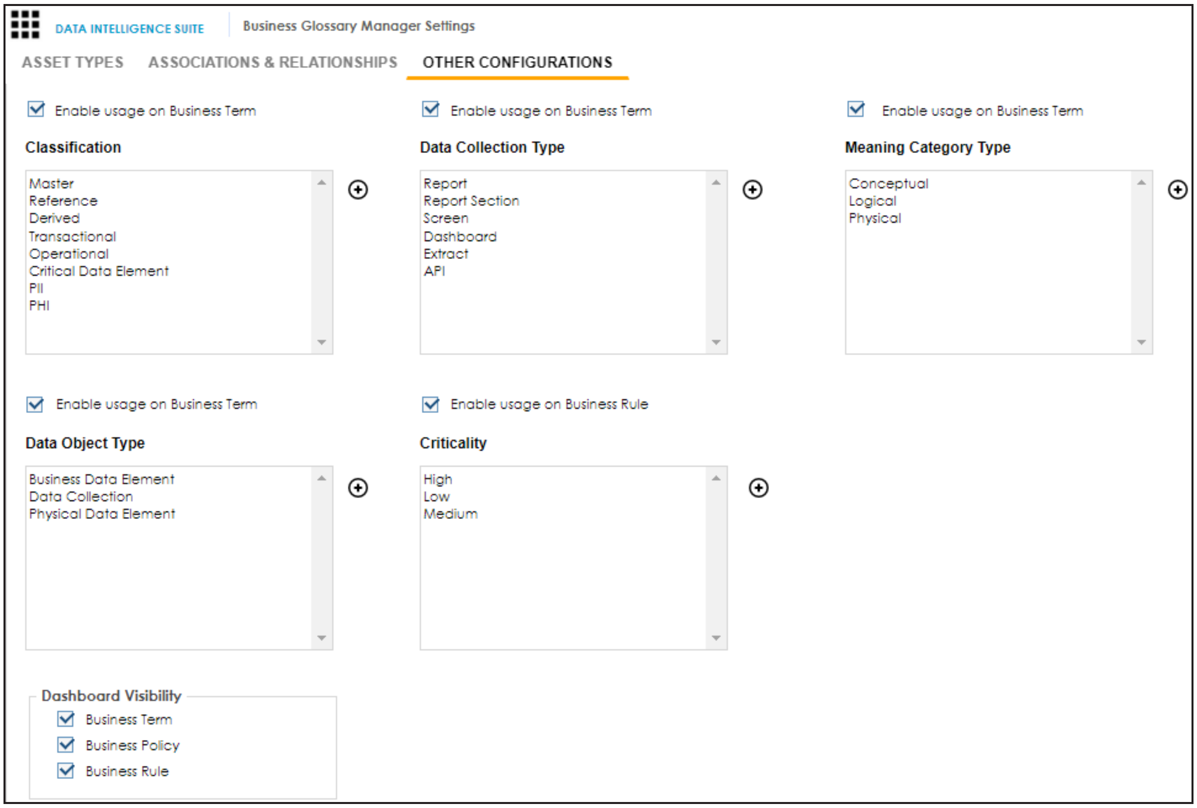
Apart from the asset type and associations and relationship settings, you can configure other common properties of asset types, such as their visibility on the dashboard, classification, data collection type, and more. These properties appear as drop-down lists on the asset pages in the Business Glossary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

To configure common properties, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Business Glossary Manager**.

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

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



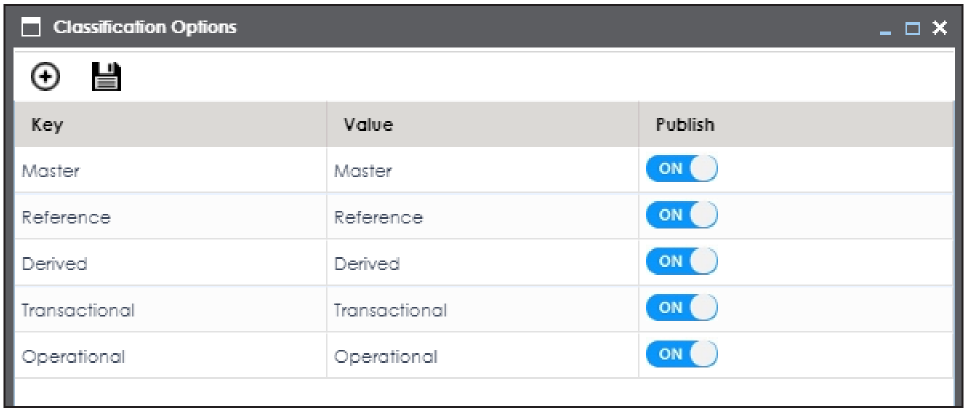
3. Select **Enable usage on Business Term** or **Enable usage on Business Rule** to select the properties that you want to enable for Business Terms and Business Rules.
   You can add, and enable or disable the options available under each property. For more information, refer to the Edit Property Options 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.

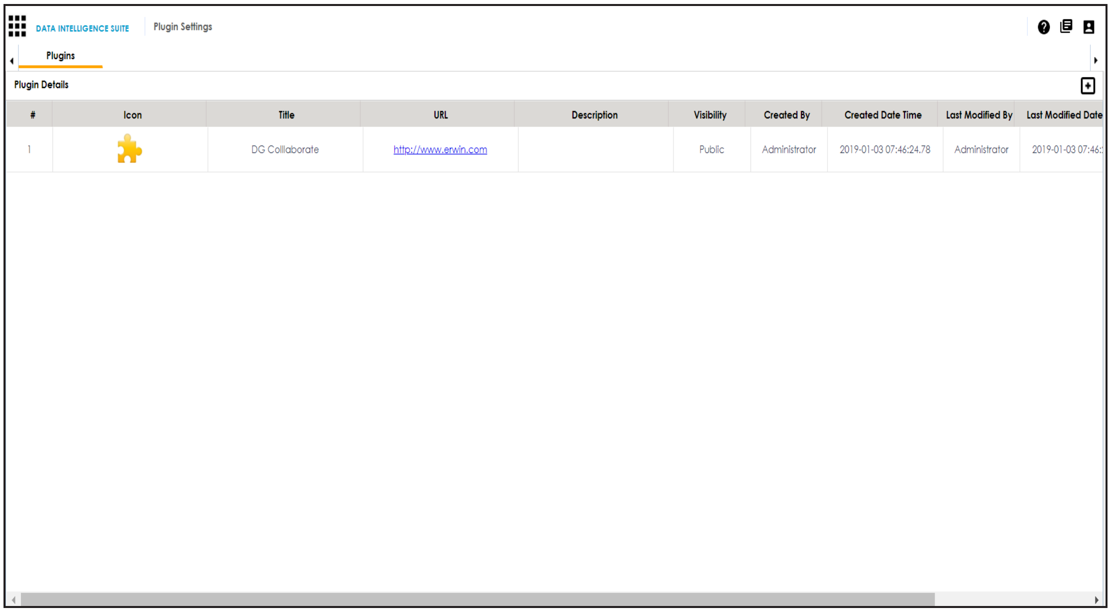
Configuring Plugins

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:

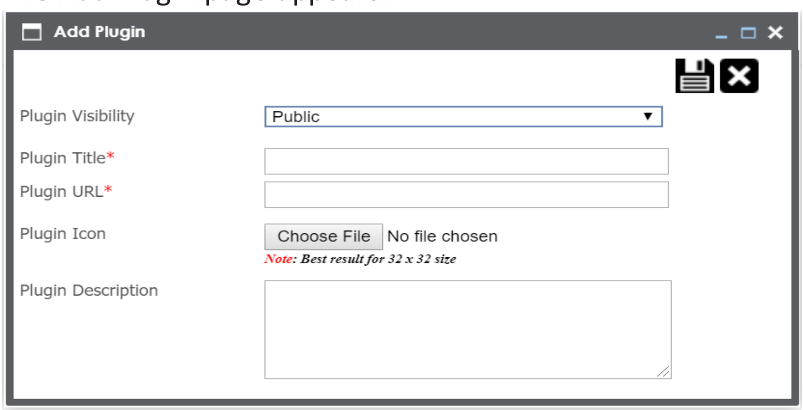
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Plugins**.

   The Plugin Details page appears.



2. To add plugins, click .

The Add Plugin page appears.



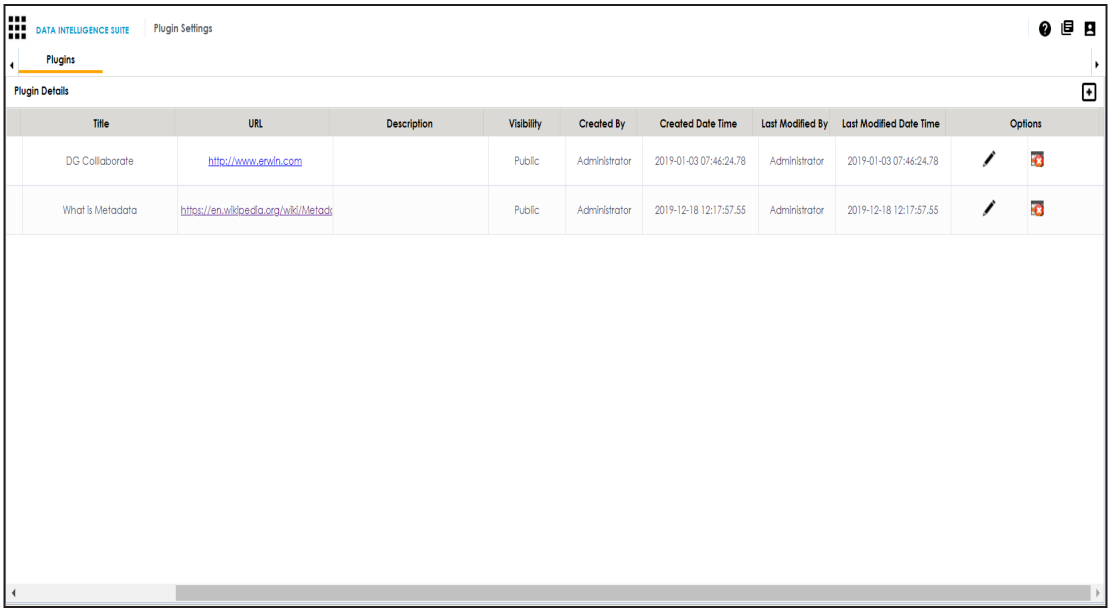
3. Enter appropriate values to the fields. Fields marked with red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Plugin Visibility	Select appropriate plugin visibility. ▪ Choose Private to restrict its visibility to yourself. ▪ Choose Public to make it visible to all the users.

Field Name	Description
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.



5. To edit plugin details, use .

6. To delete plugins, use .

Configuring Miscellaneous Settings

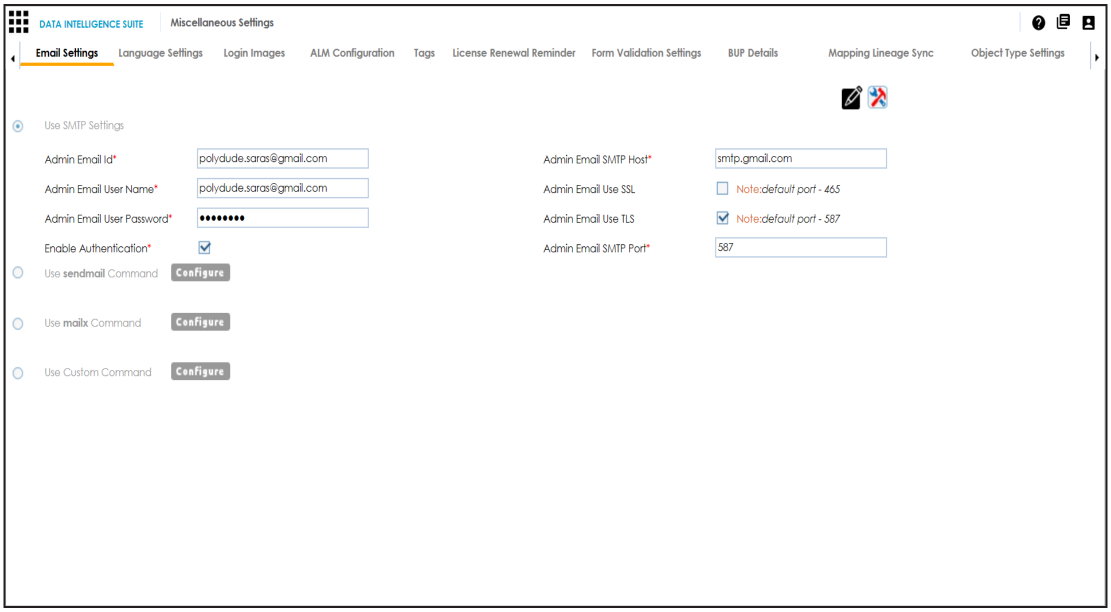
The Miscellaneous Settings page enables you to set up different modules with respect to:

- Email Settings: It enables you to configure outbound email notifications to users. You can use SMTP server or configure different commands in the Linux environment to send outbound emails.

- Language Settings: It enables you to configure UI field labels in different languages in the erwin Data Intelligence Suite (DI Suite) and the Business User Portal (BUP).
- ALM Configuration: It enables you to integrate HP ALM (Application Life Cycle Management), a third party tool with the Test Manager.
- Tags: It enables you to manage tag listing in the Business Glossary Manager.
- License Renewal Reminder: It enables you to 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.
- BUP Details: It enables you to integrate the BUP instance with the erwin DI Suite.
- Mapping Lineage Sync: It enables you to sync mapping records with lineage tables in case of any disruption. Lineage analysis can be performed in Metadata Manager and Mapping Manager.
- Object Type Settings: It enables you to set the color of objects (system, environment, table, and column) in a mind map.

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

The Miscellaneous Settings page appears:



Configuring Email Settings

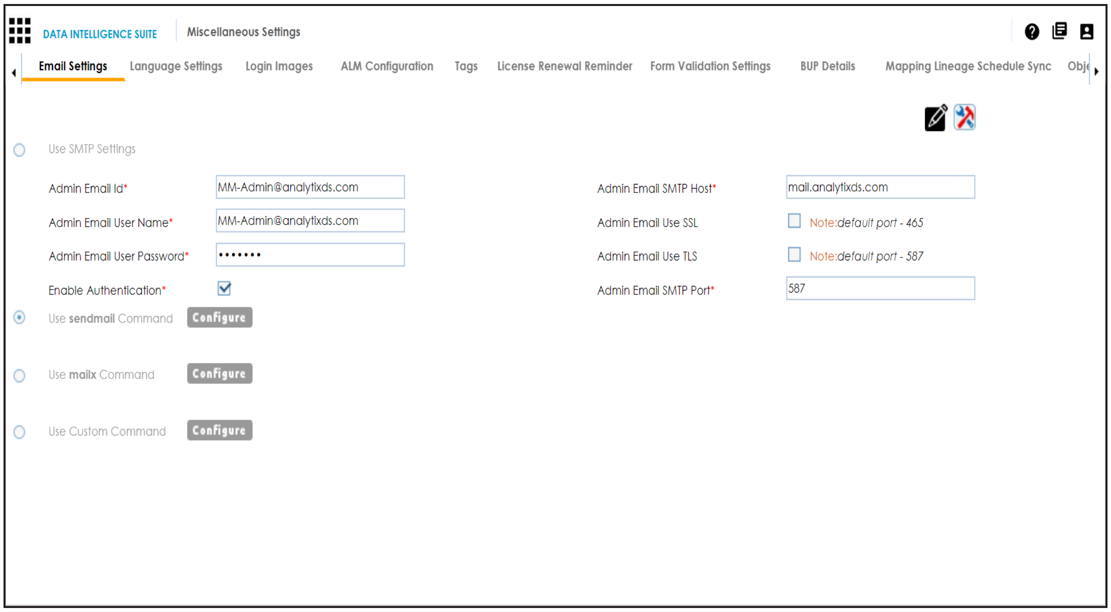
You can configure Admin Email Id to send notifications to the users of erwin Data Intelligence Suite (DI Suite). It involves using:

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

To configure email settings, follow these steps:

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

   The Miscellaneous Settings page appears and 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 out-bound emails.

To configure the SMTP Settings, follow these steps:

1. Select **Use SMTP Settings**.

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

Field Name	Description
Admin Email Id	Specifies the email id being used to send the notifications. For example, polydude.alice@gmail.com
Enable Authentication	Specifies whether the SMTP host requires authentication using the Admin Email User Name and Admin Email User Password. Select the **Enable Authentication** check box to enable

Field Name	Description
	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.

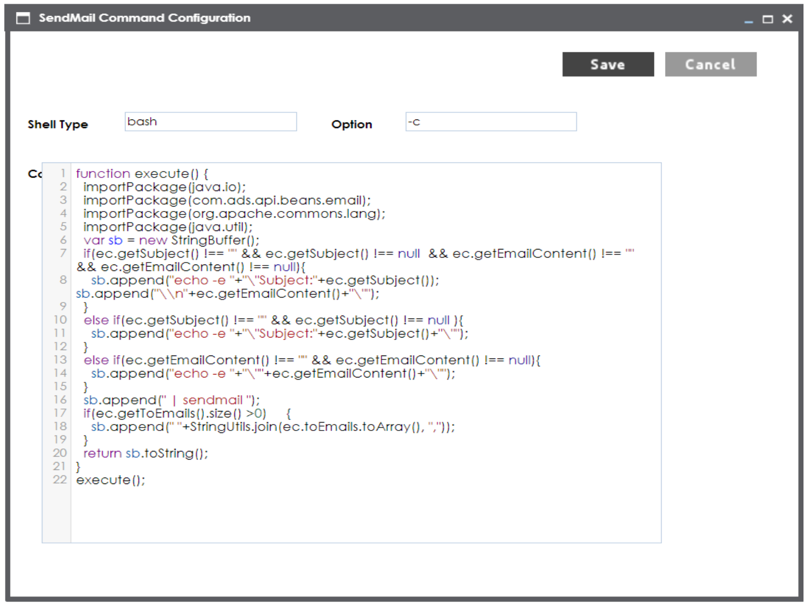
Use sendmail Command

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

To configure the sendmail command, follow these steps:

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

   The following page appears:



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

   The sendmail command is configured.

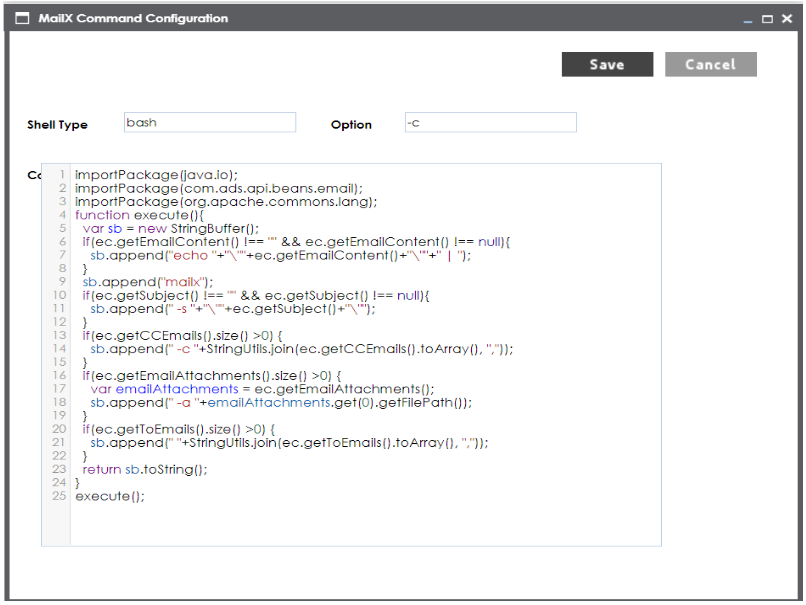
Use mailx Command

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

To configure the mailx command, follow these steps:

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

   The MailX Command Configuration page appears.



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

   The mailx command is configured.

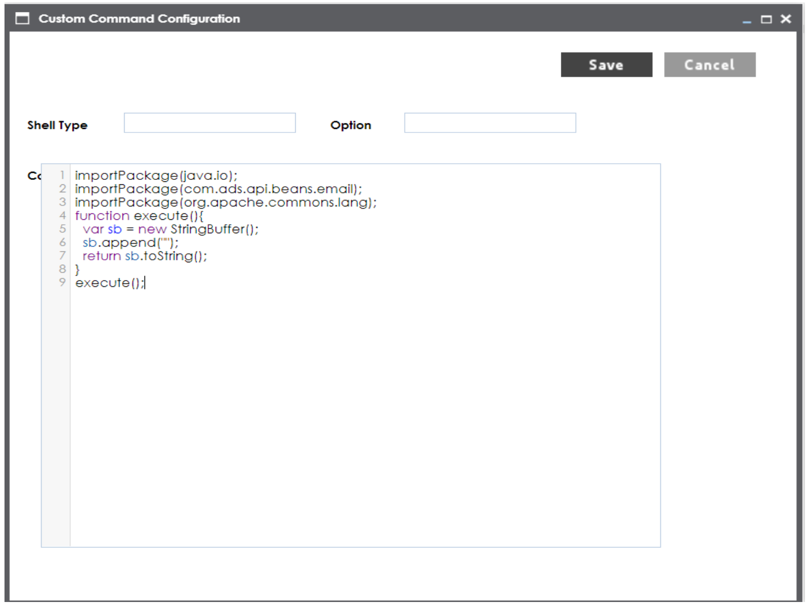
Use Custom Command

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:

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

   The Custom Command Configuration page appears.

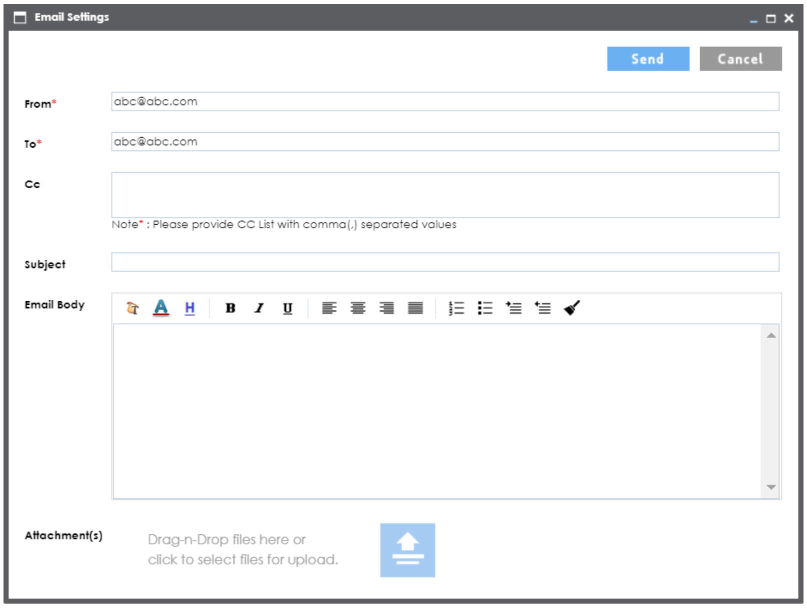


3. Configure the custom command.
4. Click **Save**.

   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.

7. Click **Send**.

   The success message validates your email settings.

Configuring Language Settings

You can configure UI labels in different languages that enables users to use erwin DI Suite in their preferred languages. These UI labels can be edited as per your requirements.

Note: You can set a user's language preference in the Resource Manager.

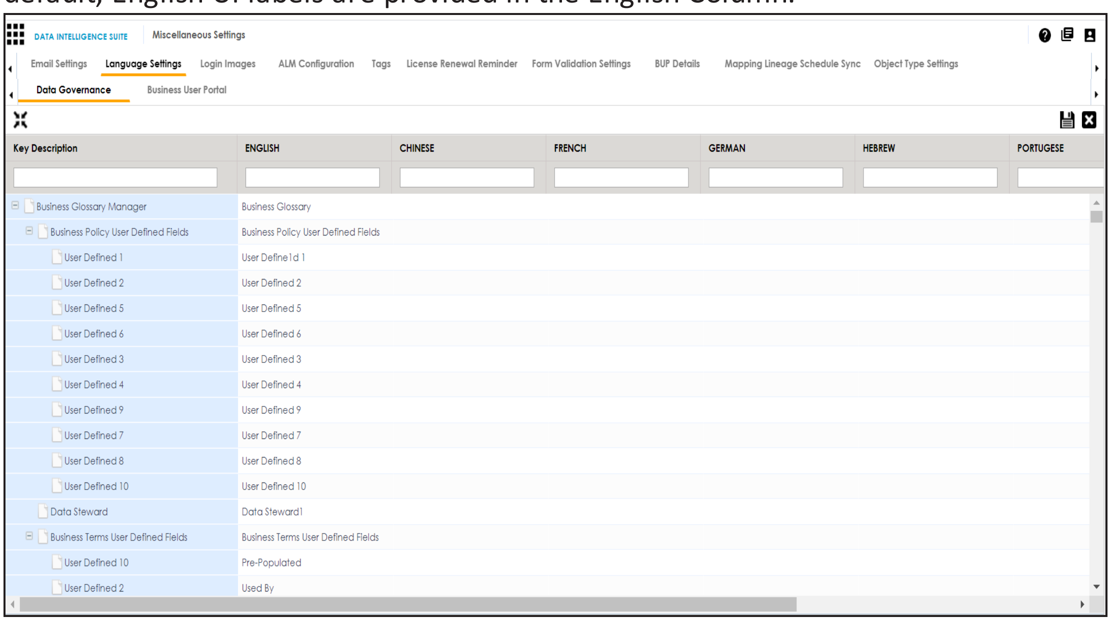
erwin DI Suite supports the following languages:

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

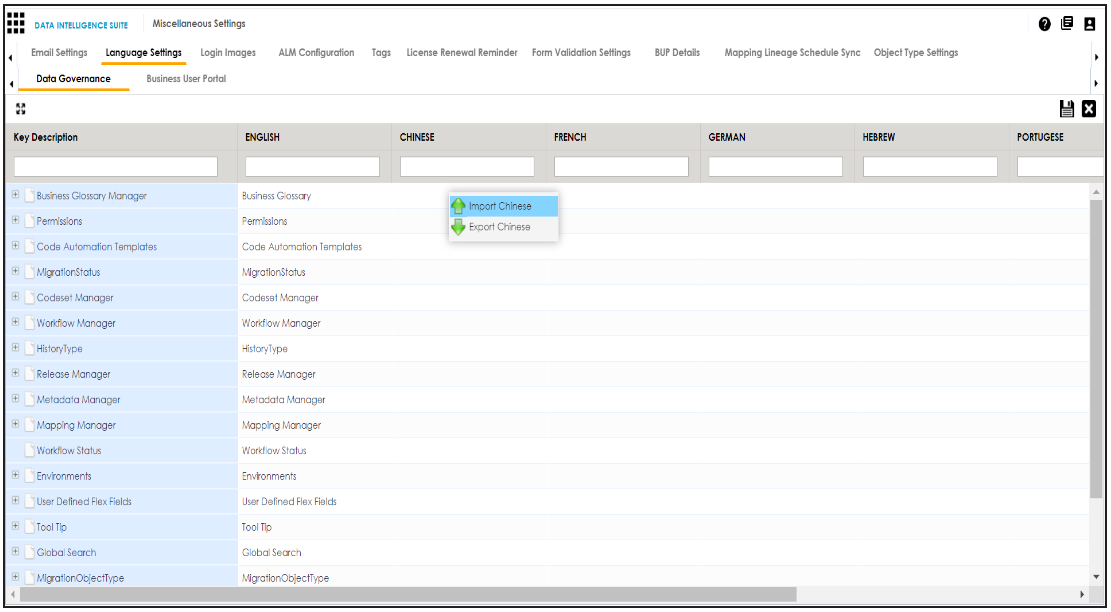
To configure UI labels in different languages, follow these steps:

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

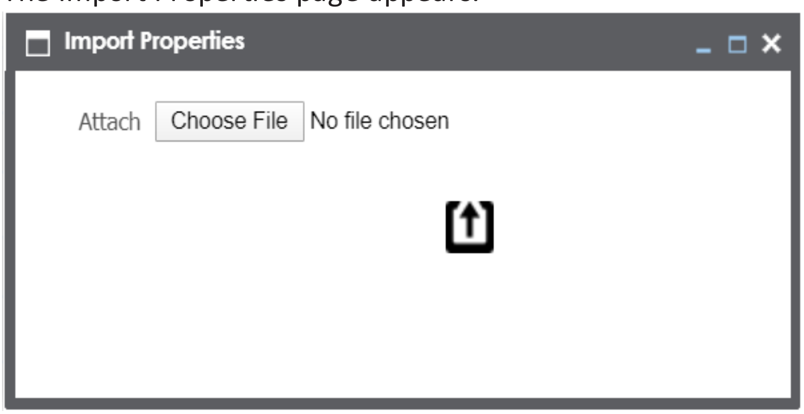
   The following page appears. The keys are organized in a tree structure in the Key Description pane to help identify the location of the UI label in the application. By default, English UI labels are provided in the English Column.

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



The Import Properties page appears.



3. To browse the properties file, click **Choose File**.

4. To upload the file, click .

   The 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 desired UI label.
3. Click .

Note: You can use your own UI labels for user defined fields, by editing the corresponding cells.

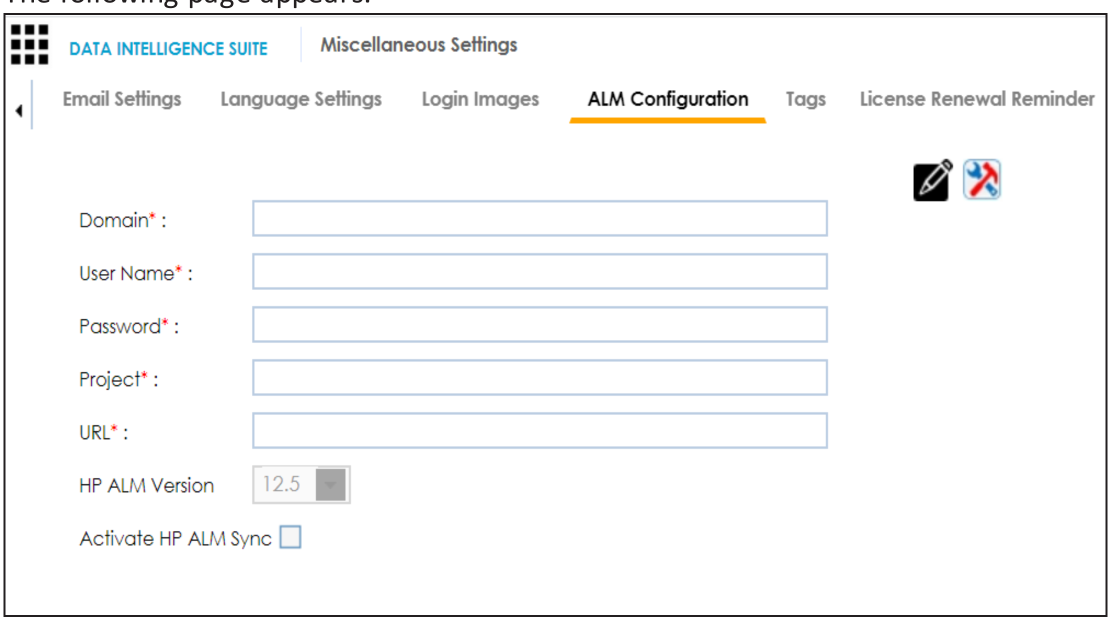
Configuring HP ALM

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** > **Miscellaneous** > **Settings** > **Miscellaneous** > **ALM Configuration**.

   The following page appears.



2. Click .

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

Field Name	Description
Domain	Specifies the name of a domain created in the HP ALM. For example, Banking.
User Name	Specifies the user name to log on to ALM. For example, James99.
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 Suite. For example, 12.2.
Activate HP ALM Sync	Specifies whether a sync between HP ALM and erwin DI Suite is activated. Select the check box to sync HP ALM with erwin DI Suite.

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 Tags in Business Glossary Manager

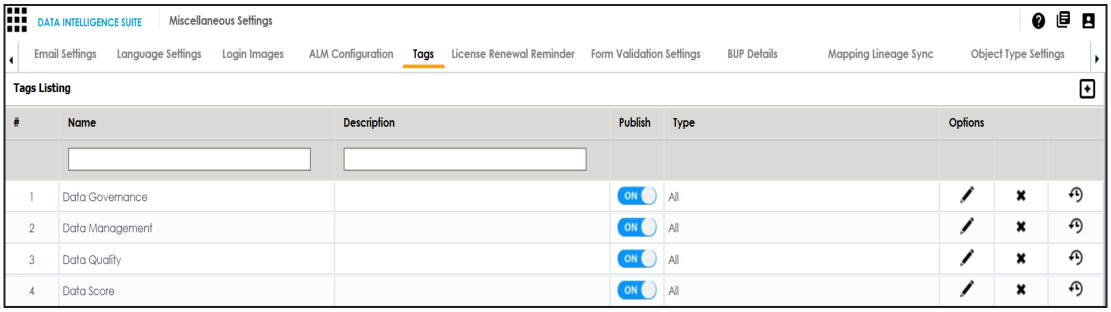
You can configure a tag list for the Business Glossary Manager. You can use the tag list to tag :

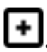
- Business term
- Business rule
- Business policy

To configure tag list, follow these steps:

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

   The following page appears.



2. Click .

   The New Tag Form page appears.

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

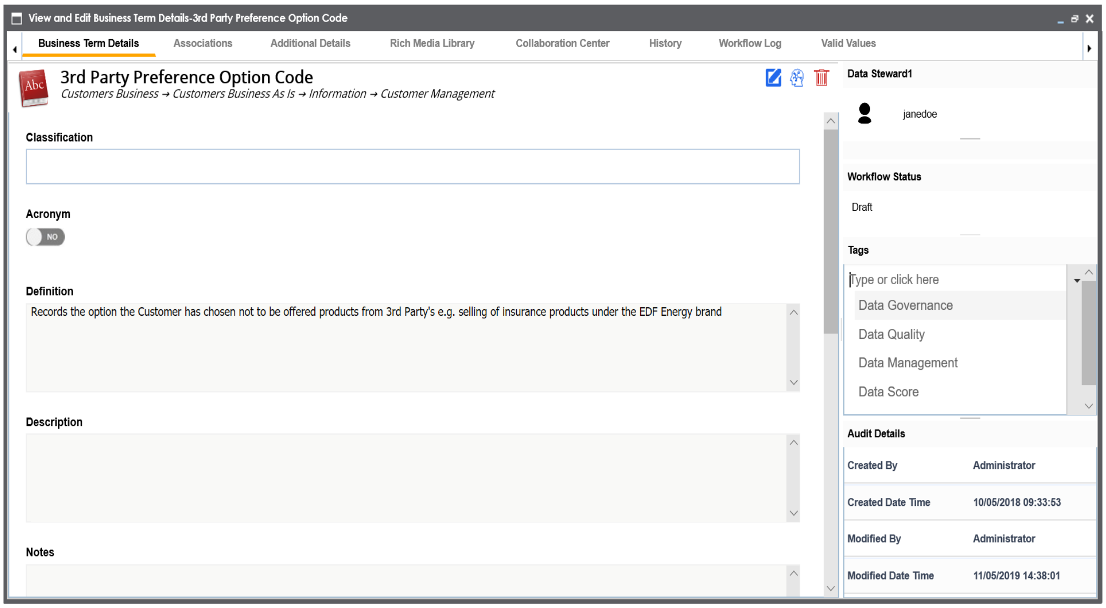
Field Name	Description
Tag Name	Specifies the unique name of the tag. For example, Data Governance.
Description	Specifies the description about the tag. For example: This tag can be used to tag a business term.
Publish	Specifies whether the tag is published. Switch **Publish** to **ON** to publish the tag.
Tag Type	Specifies the type of the tag. Valid values are: - All

Field Name	Description
	▪ Business Term ▪ Business Rule ▪ Business Policy

4. Click **Save**.

   The tag is saved in Tags Listing and you can use it to tag the business asset.

   Note: The tag can be used only for the business asset which is selected in the Tag Type field.



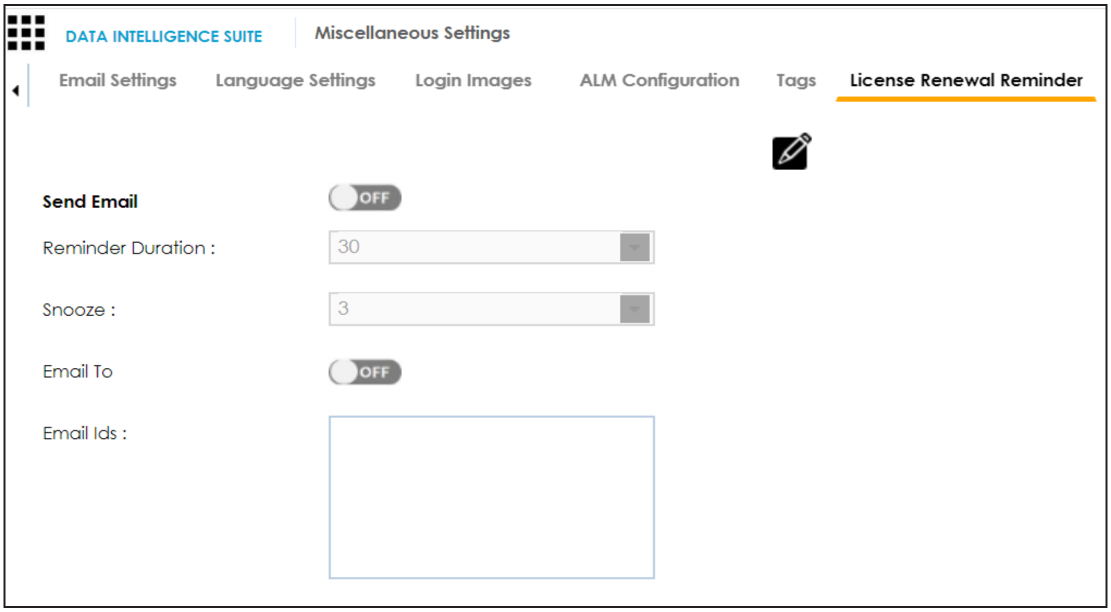
Configuring License Renewal Reminders

You can send license renewal reminders to a list of recipients from Admin Email Id. You can also configure reminder duration and snooze time in days.

To configure license renewal reminders, follow these steps:

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

The following page appears.



2. Click .
3. Switch **Send Email** to **ON** to enable reminder emails.
4. Select the Reminder Duration in days.

   For example, 30. Recipients receive a reminder email when these number of days are left for the license to expire.
5. Select the snooze in days.

   For example, 3. Recipients receive one reminder email everyday when these number of days are left for the license to expire.
6. Switch **Email To** to **ON** to enable entry of recipients email IDs in the Email Ids box.
7. Enter the recipient's email IDs in Email Ids.

   For example: abc.k@sdf.com, asd.y@bnm.com. Only these recipients may receive reminder emails from the Admin Email Id.
8. Click .

   The license renewal reminders are configured.

Configuring Form Validation Settings

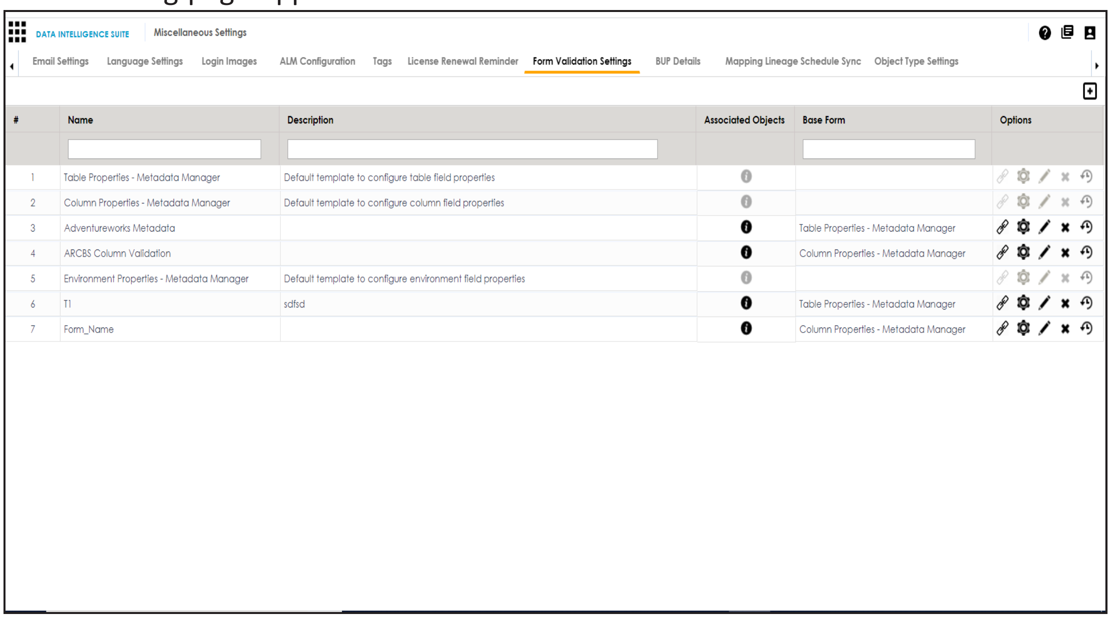
You can create and configure three different form types of the Metadata Manager:

- **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:

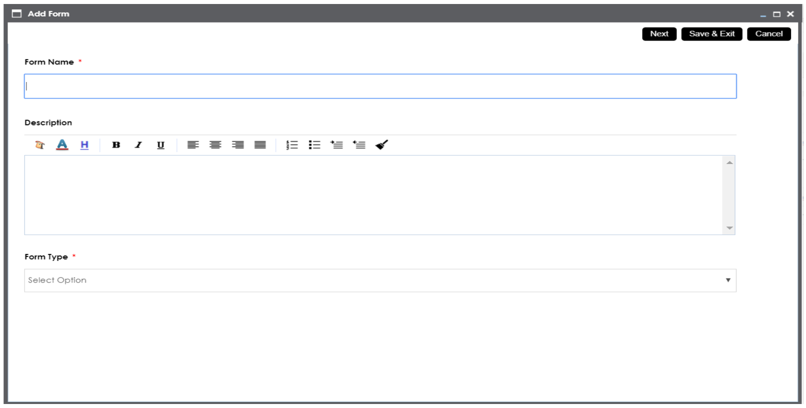
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Miscellaneous** > **Form Validation Settings**.

   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
- Manage the form

Configuring Form Fields

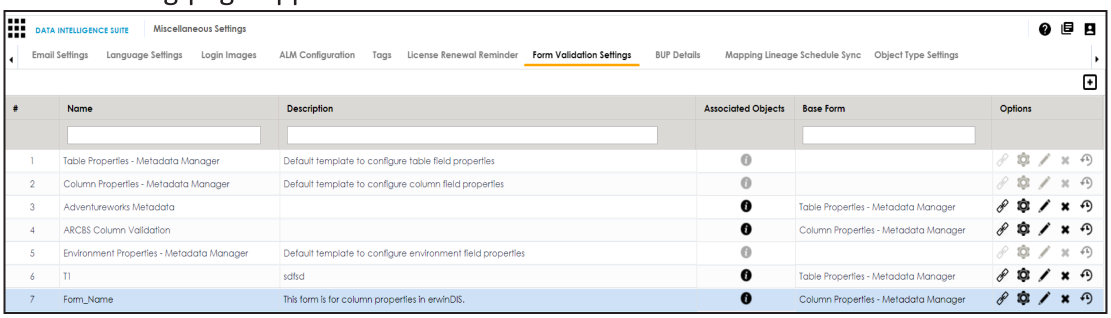
You can configure form fields and change its properties by:

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

To configure form fields, follow these steps:

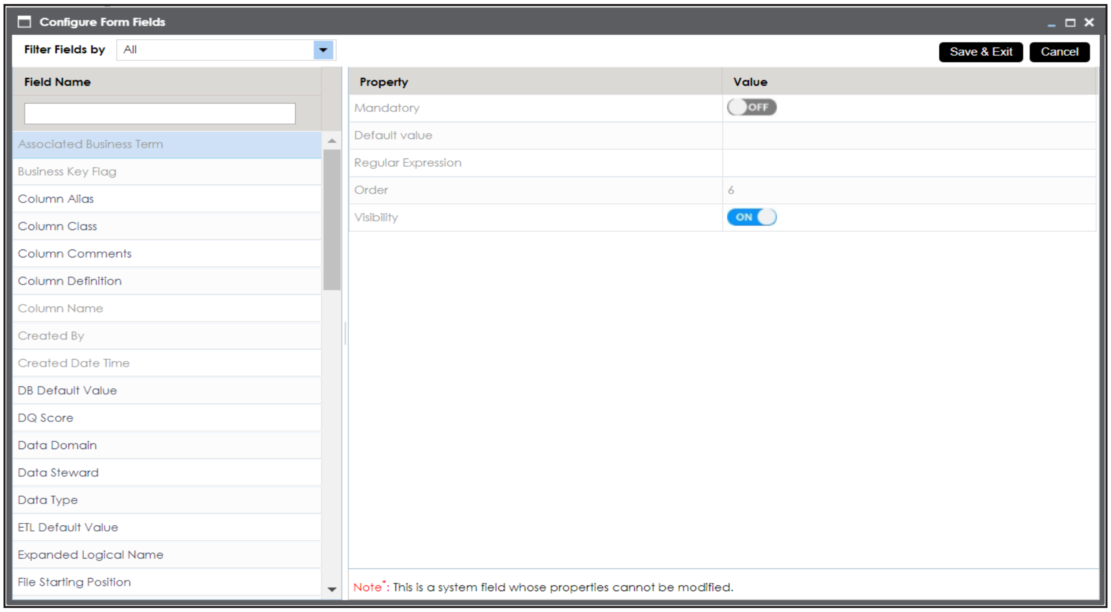
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Miscellaneous** > **Form Validation Settings**.

   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

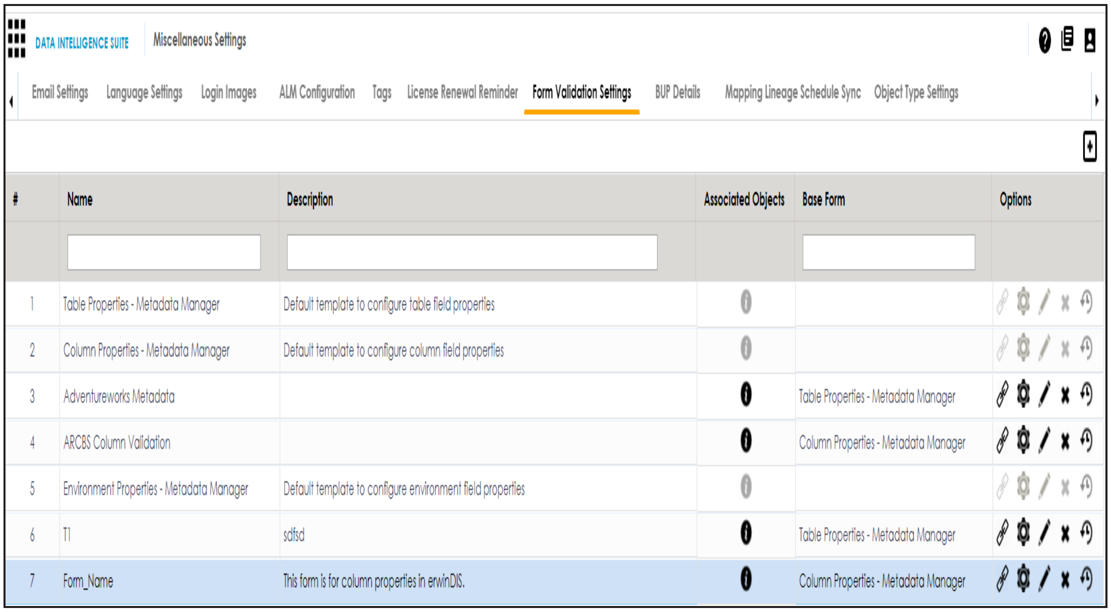
Association of a form depends on the type of the form. You can associate forms in the following manner:

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:

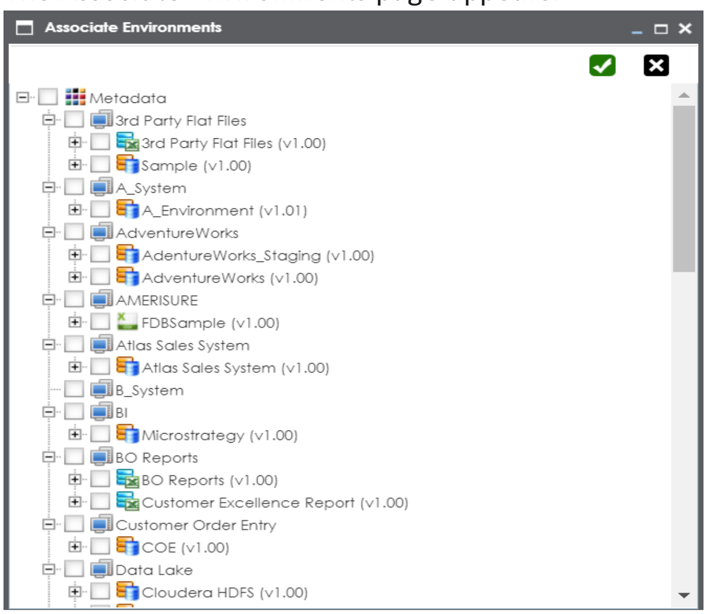
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Miscellaneous** > **Form Validation Settings**.

   The following page appears.



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

The Associate Environments page appears.



3. Select the systems or environments, and click .

The form is associated.

Managing Forms

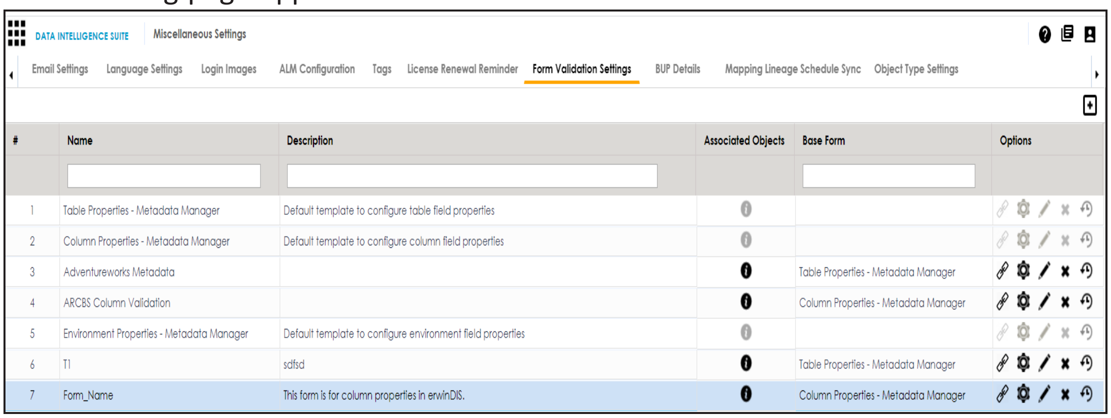
Managing forms involves:

- Editing Forms
- Deleting Forms
- Viewing Activity Logs

To manage forms, follow these steps:

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

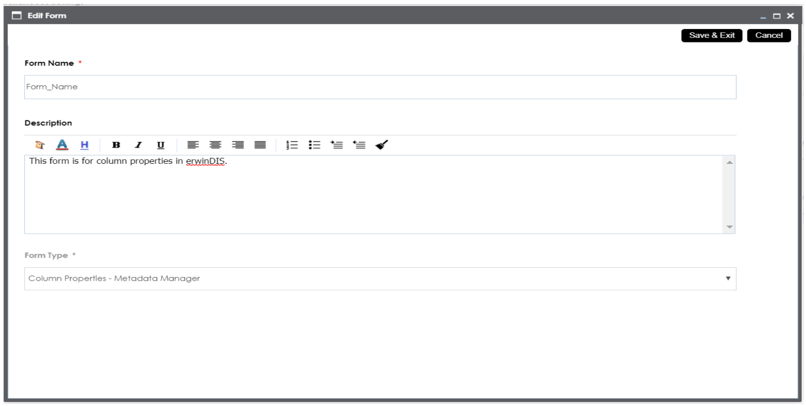
   The following page appears.



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 .

Configuring BUP Details

You can integrate a Business User Portal (BUP) instance with a particular instance of erwin DI Suite. You can also select the modules which appear in the BUP instance.

We recommend you to install a BUP instance on the same machine where erwin DI Suite is installed and point both the applications to the same database.

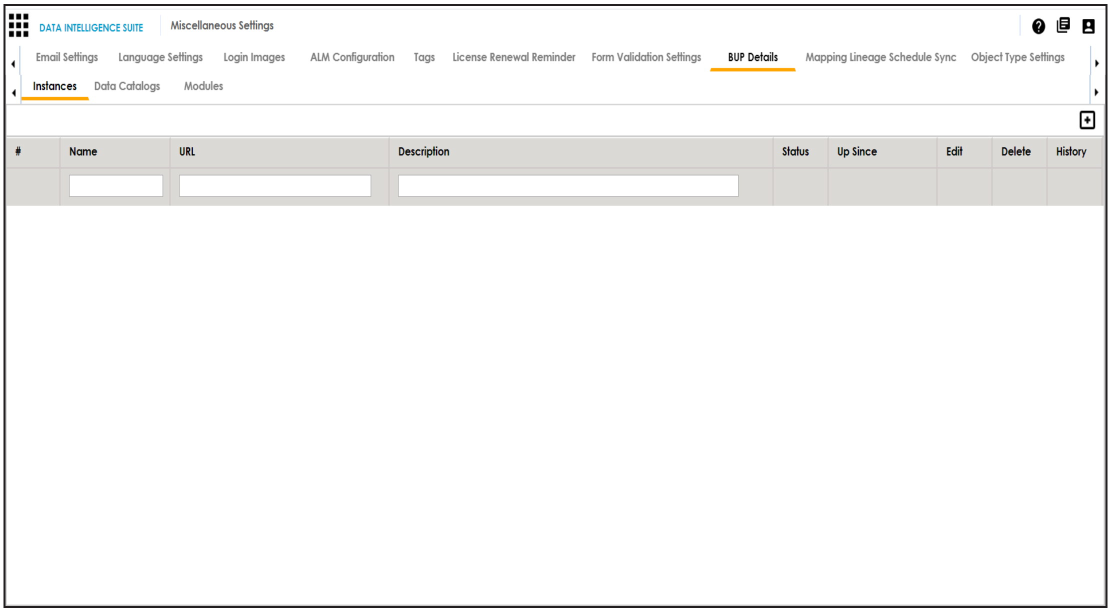
Note: You can integrate one instance of BUP with one instance of erwin DI Suite. If BUP and erwin DI Suite applications are installed on different machines, then ensure that:

- You copy ReportingManager and BusinessGlossaryManager folders from Apache Software Foundation > Tomcat > webapps > erwin DI Suite application and paste in C:\MappingManager.
- Both the applications should point to the same database.

To configure BUP instance, follow these steps:

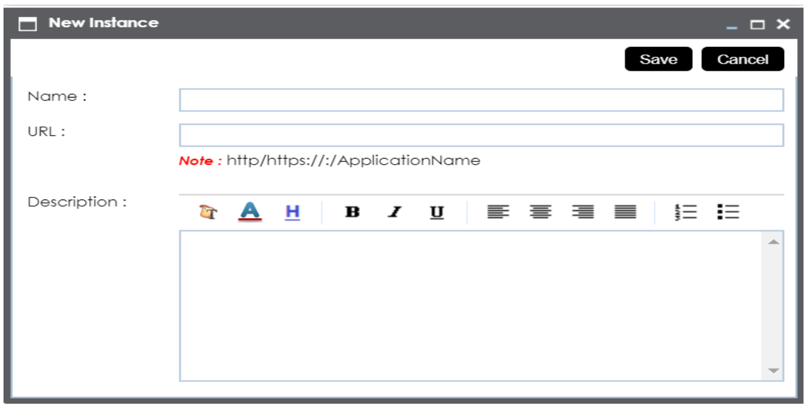
1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Miscellaneous** > **BUP Details**.

   The following page appears.



2. Click .

   The New Instance page appears.

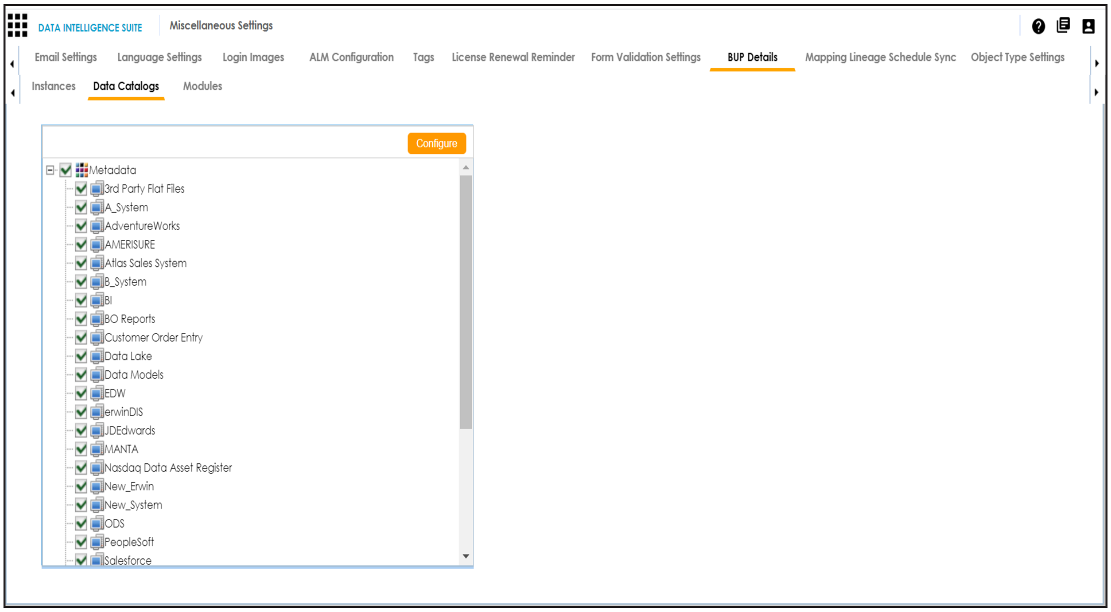


3. Enter a Name, URL, and Description of the BUP instance.
4. Click **Save**.

   The BUP instance is added to the BUP instance list.

To select systems which appear in the BUP instance, follow these steps:

1. Click the **Data Catalogs** tab.

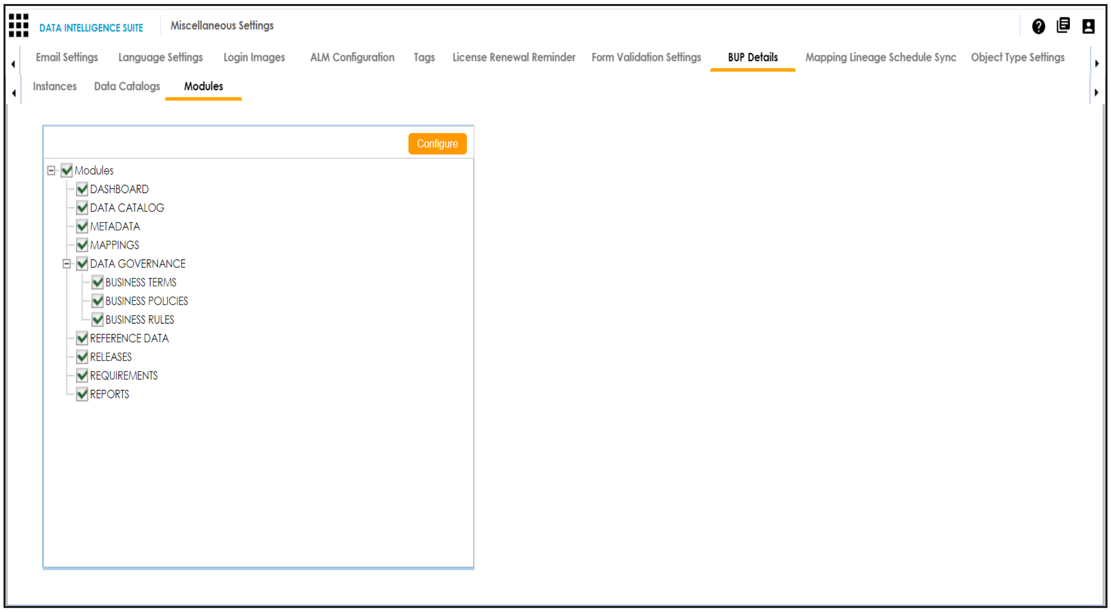


2. Click **Configure**.
3. Select the systems to make them appear in the BUP instance.
4. Click **Save**.

   The selected systems appear in the BUP instance.

To select the modules which appear in the BUP instance, follow these steps:

1. Click the **Modules** tab.



2. Click **Configure**.
3. Select the modules to make them appear in the BUP instance.
4. Click **Save**.

   The selected modules appear in the BUP instance.

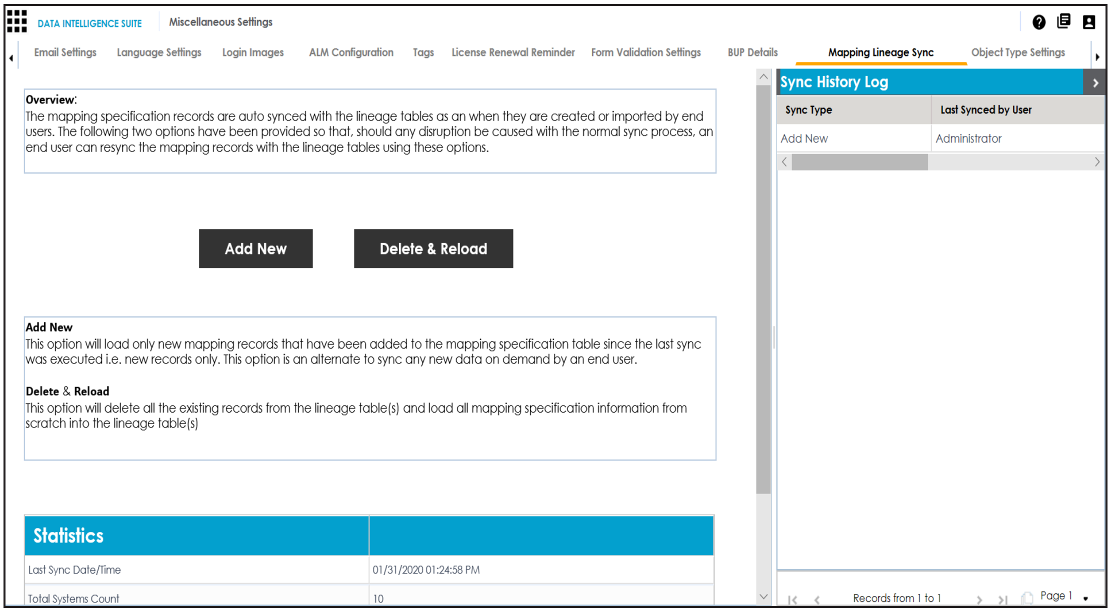
Mapping Lineage Sync

The mapping specification records are auto synced with the lineage tables as an when they are created or imported by you. You can resync mapping records with the lineage tables in case of any disruption.

To resync mapping records with the lineage tables, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Miscellaneous** > **Mapping Lineage Sync**.

   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 the mapping specification table since the last sync.

Delete & Reload

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

Statistics

This pane displays the detailed mapping records synced with the lineage tables.

Sync History Log

Displays the activity log of the user.

Configuring Object Type Colors

A mind map is a pictorial representation of associations between business assets, system, environment, table, and column. You can view a mind map in the Business Glossary Manager after associating business assets with different objects or business assets.

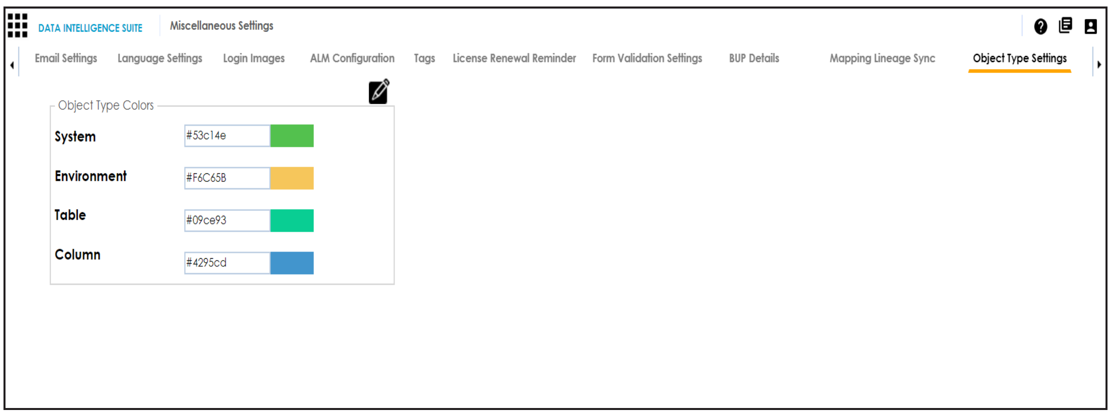
You can personalize mind maps by setting object type colors for:

- System
- Environment
- Table
- Column

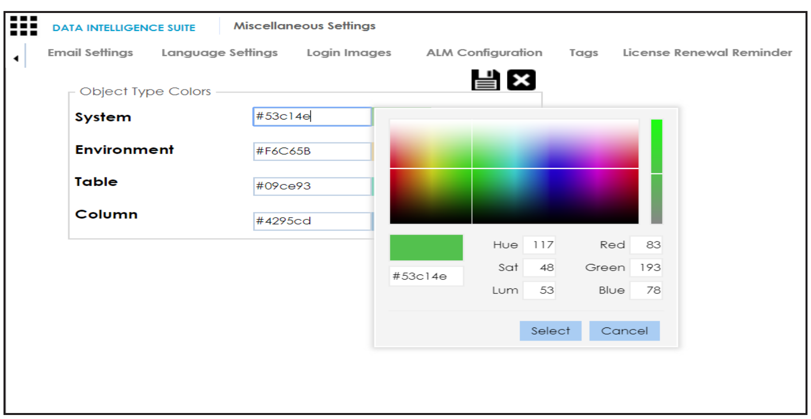
To set object type colors, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Miscellaneous** > **Object Type Settings**.

   The Object Type Colors page appears.

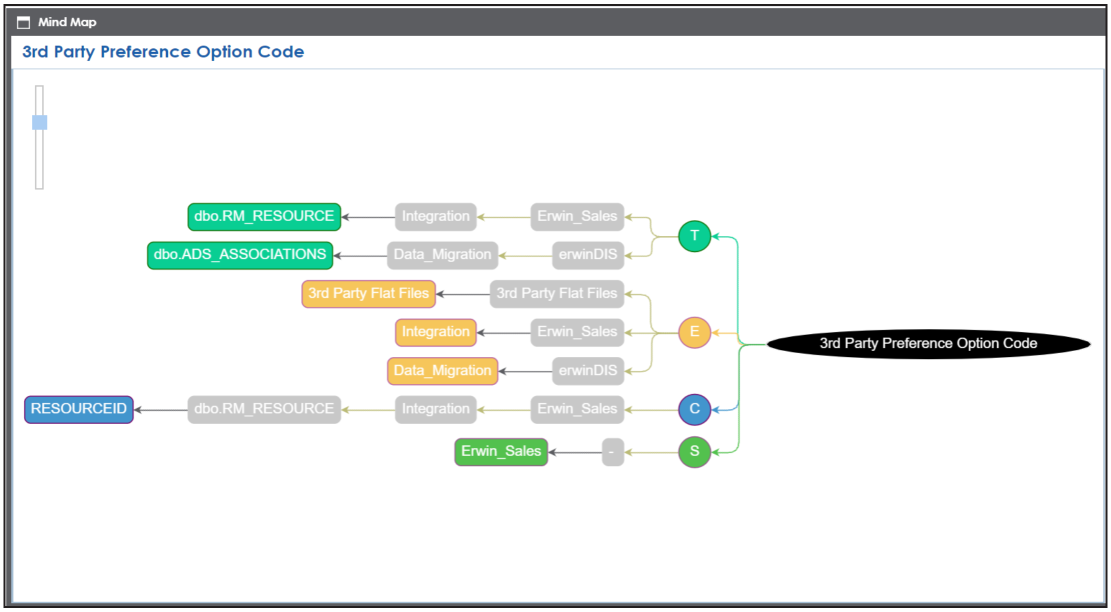


2. Click .
3. Click an object box and then select a color on the color card.



4. Click .

The object types in the mind map appear in selected colors.

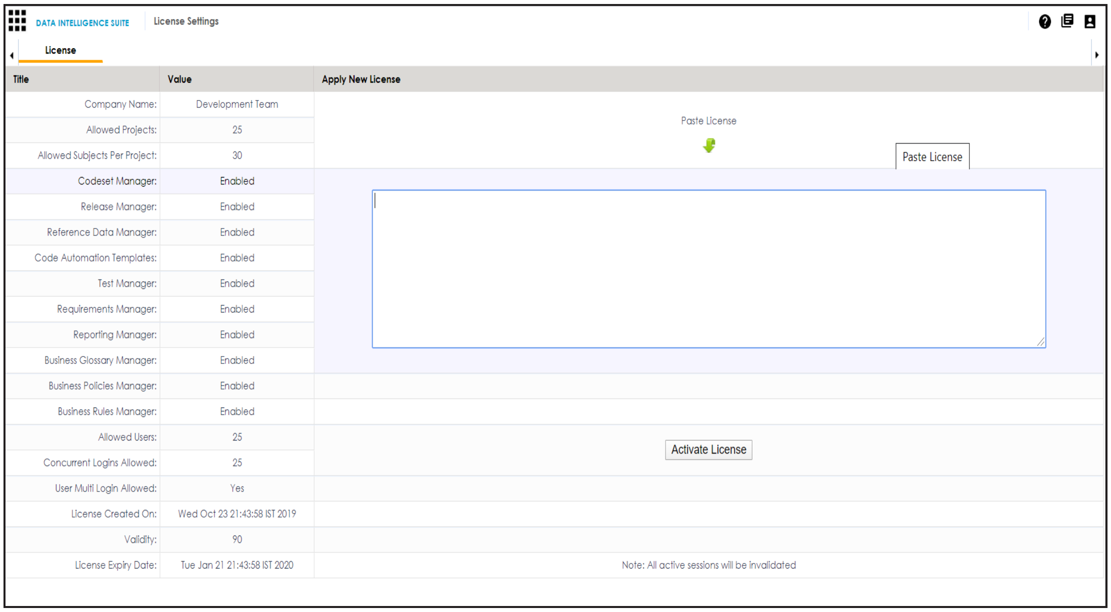


Configuring License

A license to erwin DI Suite 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** > **Miscellaneous** > **Settings** > **License**.



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

   The license is updated.