erwin Data Intelligence Suite

Resource Management Guide

Release v10.0

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Review support maintenance programs and offerings.

Registering for Support

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

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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

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Contents

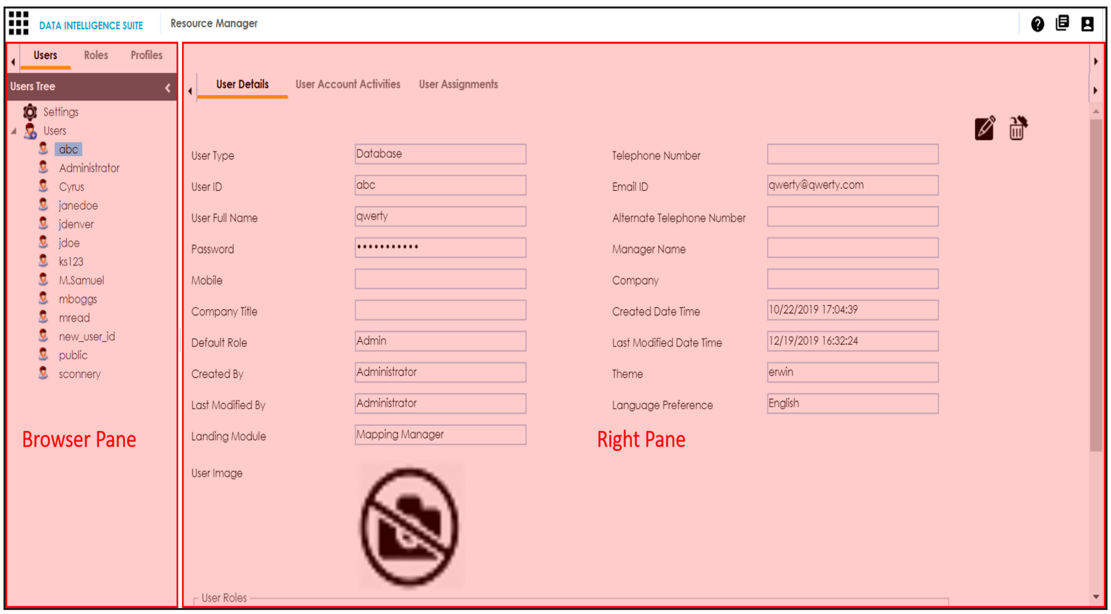
Managing Resources

Resource management is done via Resource Manager. The Resource Manager enables you to create users, roles and profiles. Roles are used to assign access-level permissions to users. Profiles are used to set up user-specific mapping grid views in Mapping Manager and code value grid views in Codeset Manager.

erwin DI Suite has a default Administrator user, Administrator role, and a Default profile which you cannot edit or delete.

Using Resource Manager

To access the Resource Manager, go to **Application Menu** > **Data Catalog** > **Resource Manager**. The Resource Manager dashboard appears:



UI Section	Function
Browser Pane	Use this pane to browse through Users Tree, Roles Tree, and Profiles panes.
Right Pane	Use this pane to view or work on the data displayed based on your selection in the browser pane.

Managing resources involves the following:

- Creating and managing roles
- Creating and managing users
- Creating and managing profiles

Creating Roles

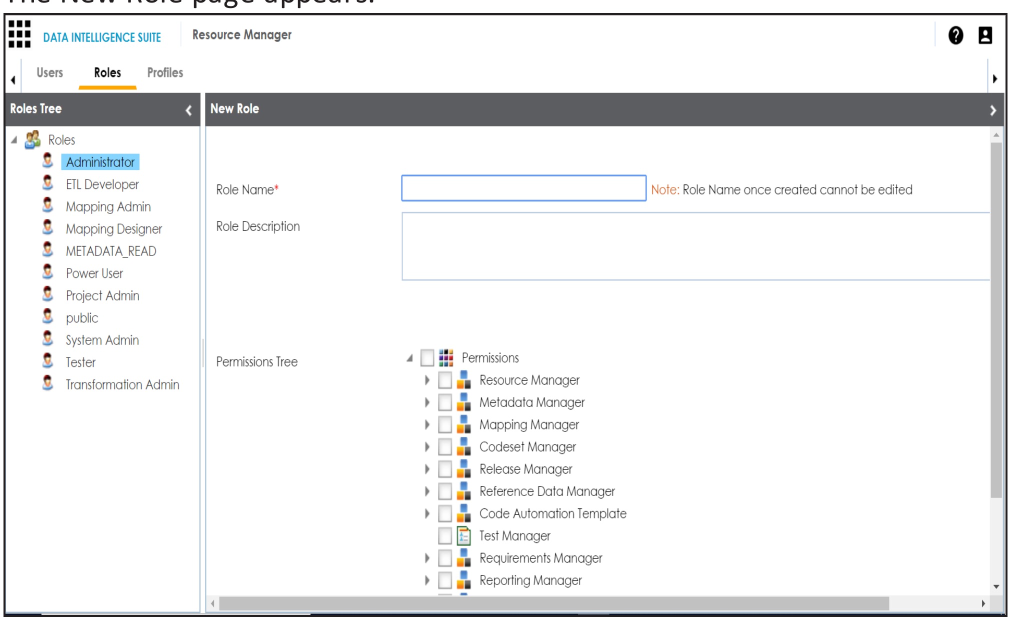
Roles enable you to assign access-level permissions to users. While few roles are available by default in erwin DI Suite, you can create your own roles.

Note: The Administrator role is system-generated and cannot be edited or deleted.

To create roles, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Resource Manager**.
2. Click the **Roles** tab.
3. Right-click the **Roles** node and then click **New Role**.

   The New Role page appears.

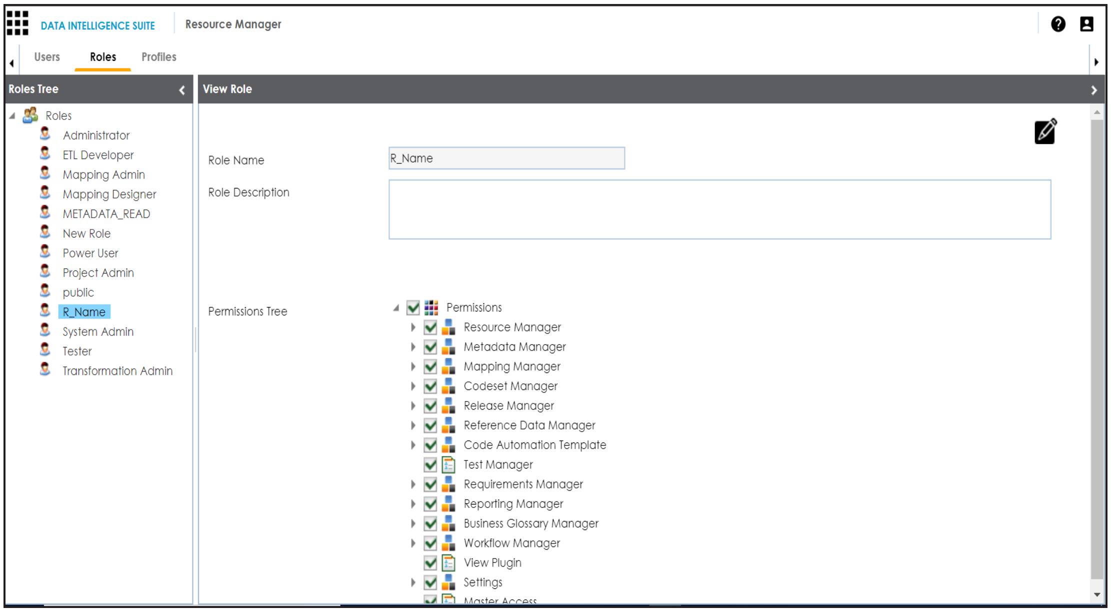
4. Enter **Role Name** and **Role Description**.

   For example:

- Role Name - Mapping Admin
- Role Description - The role has access to Resource Manager, Metadata Manager, and Mapping Manager.

5. Under the **Permissions Tree**, select the check box against the modules or the permission object to which you want to grant access to the role.
6. Click .

   A role is created and added to the Roles tree.



Once a role is created, it can be assigned to users. For more information on assigning roles, refer to Creating Users and Assigning Roles topic.

Managing roles involves:

- Editing or deleting roles
- Cloning roles

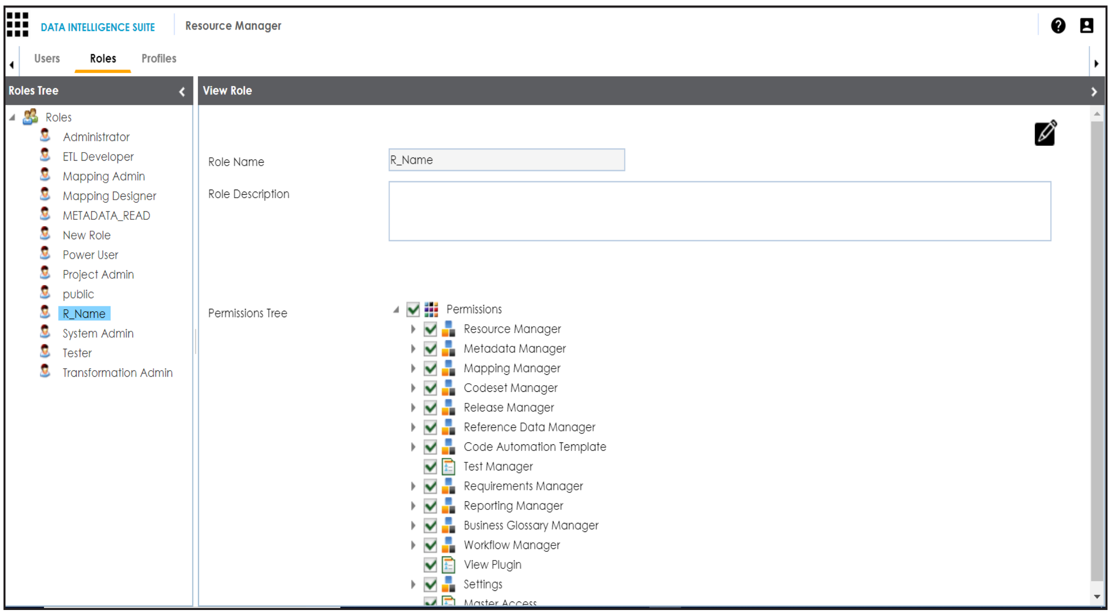
Managing Roles

Managing Roles involves:

- Editing or deleting Roles
- Cloning Roles

To manage Roles, follow these steps:

1. Go to the Roles tree and select the desired role.



2. Use the following options:

Edit Role ( )

You can modify the Permission Tree and Role Description.
Note: You cannot edit the Role Name.

Clone Role

Right-click the role and click **Clone Role**.

Delete Role

Right-click the role and click **Delete**.

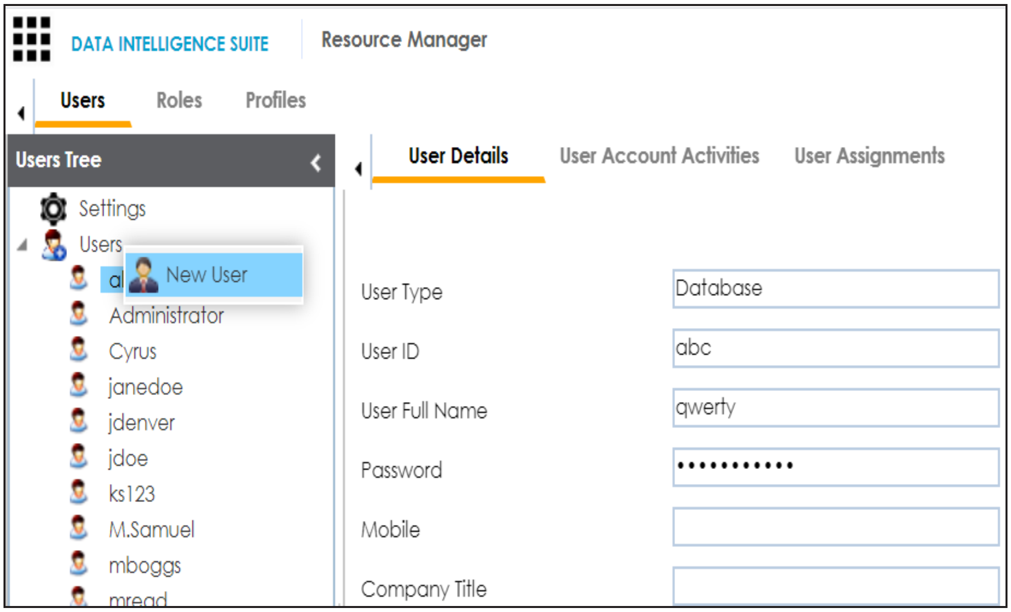
Creating Users and Assigning Roles

Creating users and assigning roles to them enables your team to access erwin Data Intelligence Suite (DI Suite) modules and projects. Follow the steps below to create users and assign them roles to define their access-level permissions.

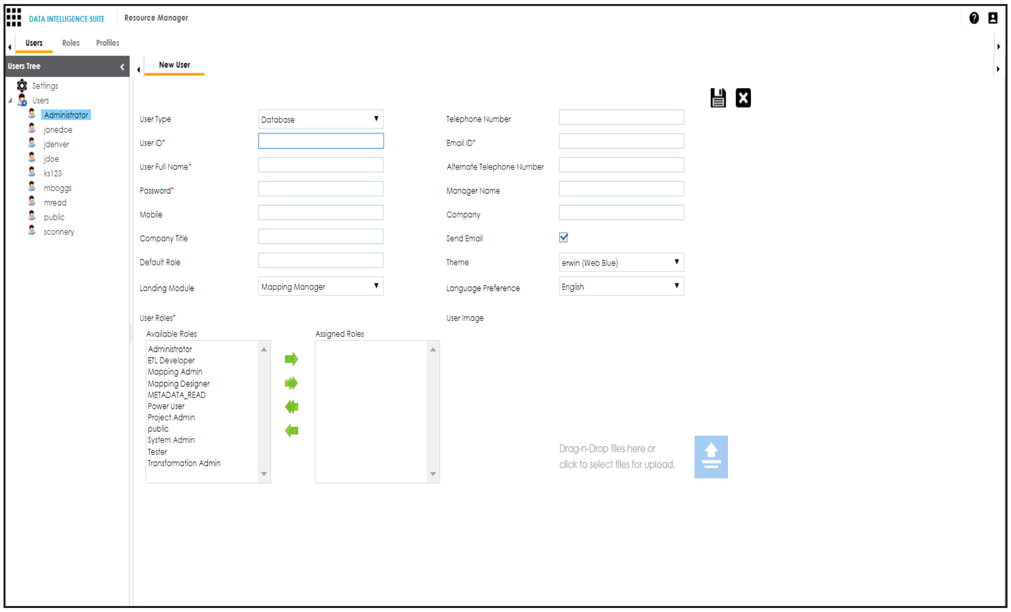
Note: The Administrator user is available by default and you cannot edit or delete this user.

To create users, follow these steps:

1. Go to **Application Menu > Data Catalog > Resource Manager** > **Users**.
2. Under the **Users Tree** pane, right-click the **Users** node and click **New User**.



The **New User** 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
User Type	Specifies whether the user type is Database, LDAP, or SAML. For example, Database.
User ID	Specifies the user name of the user to log on to erwin DI Suite. For example, janedoe.
User Full Name	Specifies the user's full name. For example, Jane Doe.
Password	Specifies the password to log on to erwin DI Suite. For example, Janedoe@1. The Administrator provides a default password, which can be changed later.

Field Name	Description
Mobile	Specifies the user's valid mobile number. For example, +658374414288.
Company Title	Specifies the user's company title or designation. For example, Data Administrator.
Default Role	Specifies the default role of the user. For example, Mapping Admin.
Landing Module	Specifies the landing module for the user. For example, Mapping Manager. The Landing Module is the first page displayed when a user logs in.
User Roles	Select roles under Available Roles list-box and move them to Assigned Roles list-box using the arrows ( or ). Similarly, to change existing role assignment, select roles under Assigned Roles list-box and move them back to Available Roles list-box using the arrows ( or ). For adding a new role under the Available Roles list-box, refer to the [Creating Roles] topic.
Telephone Number	Specifies the valid telephone number of the user. For example, 1-800-783-7946.
Email ID	Specifies the user's email address. For example, jane.doe@mauris.edu
Alternate Telephone Number	Specifies the user's valid alternate telephone number. For example, 1-802-456-7946.
Manager Name	Specifies the name of the user's reporting

Field Name	Description
	manager. For example, John Doe.
Company	Specifies the name of the user's company. For example, ABC Consulting Services.
Send Email	Specifies whether to send email to the user's email ID. Select the Send Email check box to send an email notification to the user's email ID. For more information on configuring notifications, refer to the Configuring Notifications topic.
Theme	Specifies the theme for the user to set the appearance of erwin DI Suite. By default, it is set to erwin (Web Blue).
Language Preference	Specifies the language preferred by the user. For example, English. For more information on language settings, refer to the Configuring Language Settings topic.
User Image	Specifies the physical image file being attached to the user. Drag and drop a user's image file or click to select and upload the image file.

4. Click .

   A new user is created and added to the Users tree.

Managing users involves the following:

- Editing or deleting Users
- Monitoring User Account Activities

▪ Viewing User Assignments

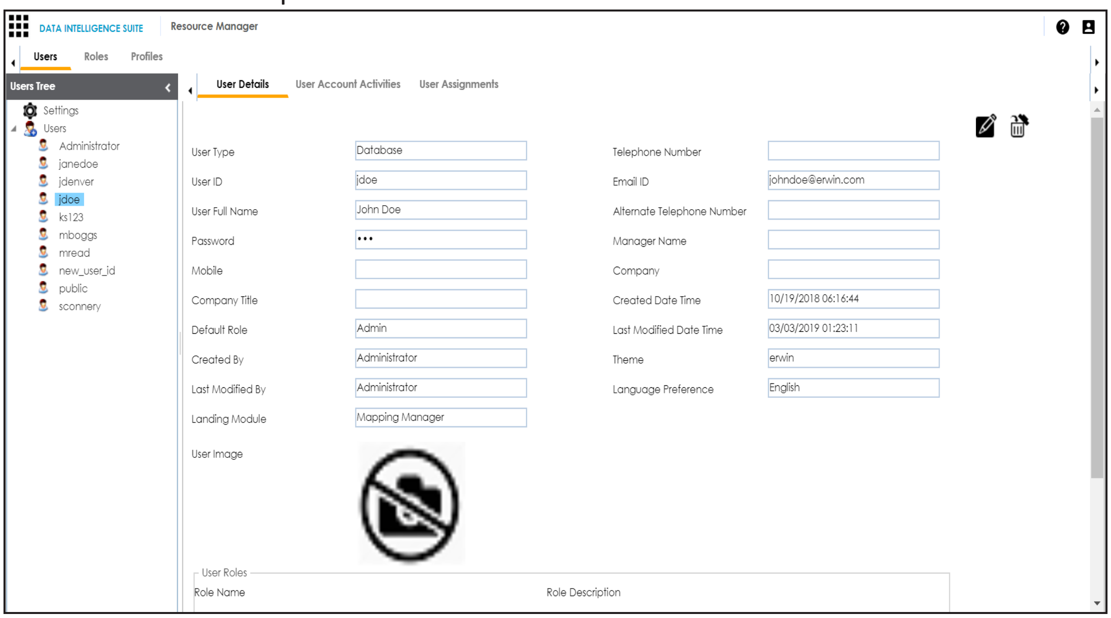
Managing Users

Managing Users involves:

- Editing or deleting Users
- Monitoring User Account Activities
- Viewing User Assignments

To manage Users, follow these steps:

1. Go to the **Users Tree** pane and select the desired user.



2. Use the following options:

Edit User ( )

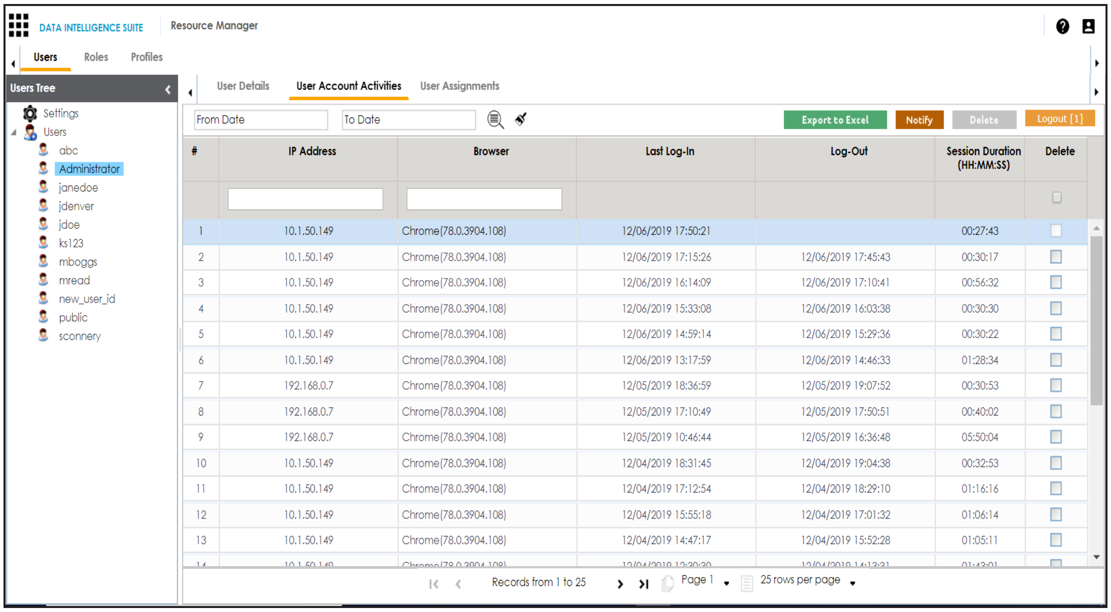
You can modify the user details as per your requirements and assign new roles to the user.

Note: You cannot edit the User Type, User ID and the Default Role.

Delete User ( )

You can delete a user that is no longer required.

3. To monitor user account activities, click the User Account Activities tab, and select the desired user from the **Users Tree** pane.



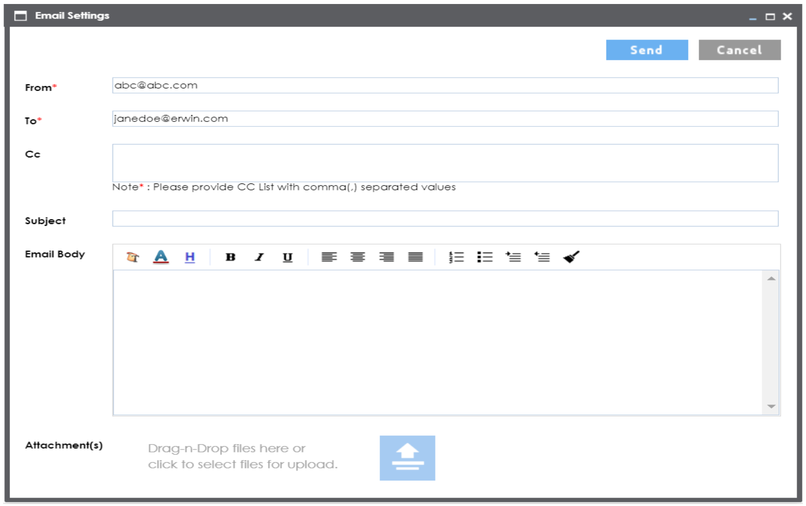
4. Use the following options:

Export to Excel

To save the selected user's account activities in .xls format, click **Export to Excel**.

Notify

To send an email notification to the selected user, click Notify.



Use the following options:

From: Enter the email ID from which you want to send the email notification. By default, email ID of the logged in user appears which can be edited.

To: Enter the email ID to which you want to send the email notification. By default, the email ID of the selected user appears which can be edited.

CC: You can add CC list of other recipients.

Subject: Add a subject to the email.

Email Body: Write the content of the email here.

Attachments: Use ( ) or drag and drop files as attachments to the email.

Send: To send the email, click **Send**.

Logout

To log out the selected user, click **Logout**.

Note: If the selected user is logged in then the Logout button appears like Logout[1].

User Account Activities during a Period

From Date and To Date

You can monitor the selected user's account activities during a period of your choice. To define the period, click in the boxes and use the respective calendars.

Search ( )

To search the user account activity based on the From Date and To Date, click ( ).

Clear Search( )

To clear the search results, click ( ).

5. To view user assignments, click the **User Assignments** tab and then select the desired user from the **Users tree** pane.

   The User Activity Report of the selected user is displayed.

Creating Profiles

Profiles help users to personalize Mapping Specification grid view in the Mapping Manager and Code Value Grid view in the Codeset Manager.

You can create two types of profiles:

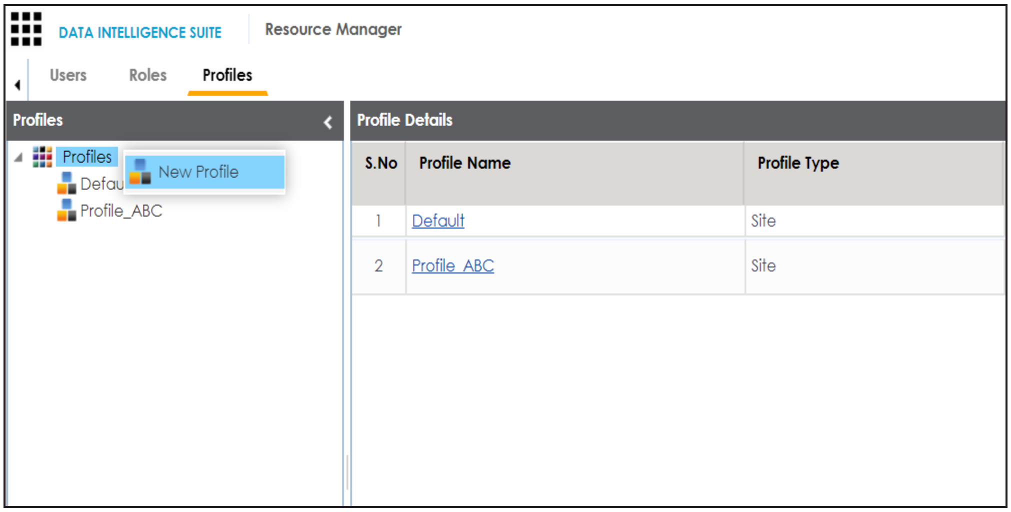
- Site Profiles: You can create a profile for other users by creating a site profile. You need to specify the users who can access the site profile.

  Note: The Default profile is available by default as a site profile for all the users. You cannot edit or delete this profile.

- User Profiles: You can create a profile for yourself. A user profile created by you cannot be accessed by other users.

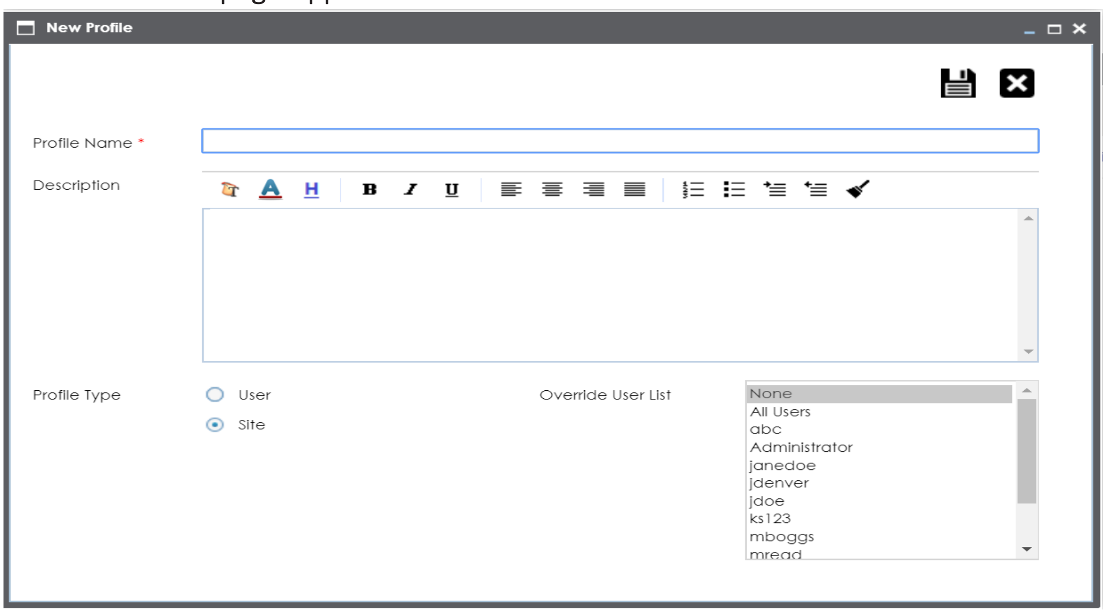
To create profiles, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Resource Manager** > **Profiles**.
2. Right-click the **Profiles** node.



3. Click **New Profile**

   The New Profile 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
Profile Name	Specifies the unique name of the profile.

Field Name	Description
	For example, Mapping_Admin_Profile.
Description	Specifies the description about the profile. For example: This is a site profile for mapping administrators.
Profile Type	▪ To create the profile for yourself, select **User**. ▪ To create profile for other users, select **Site** and select appropriate users from the **Override User List**.

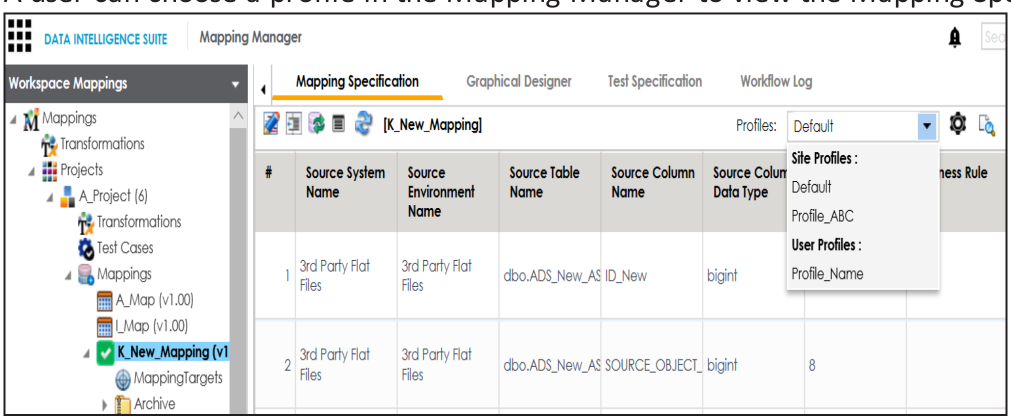
5. Click .

   A new profile is created and added to the Profiles tree. You can have an overview of the profile on the Overview page. To delete a profile, right-click the profile and click **Delete Profile(s)**.

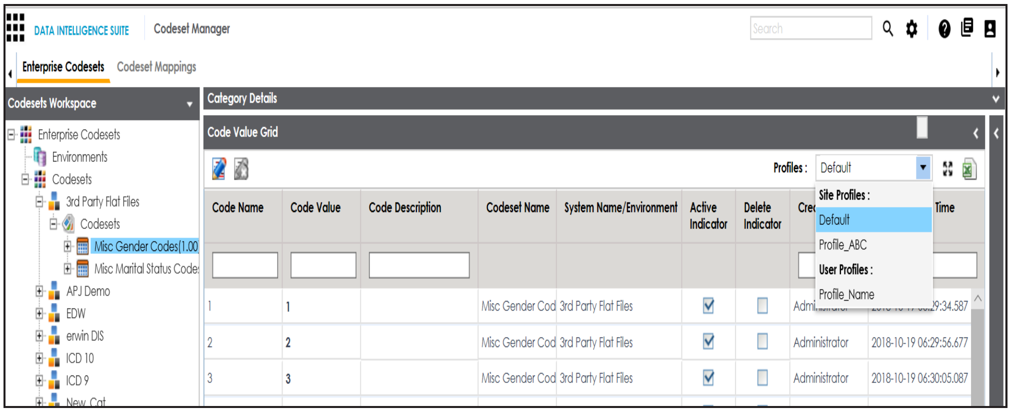
Once the profile is created you can set the following for the profile:

- Mapping grid view in the Mapping Manager
- Code value grid view in the Codeset Manager

A user can choose a profile in the Mapping Manager to view the Mapping Specification grid.



A user can choose a profile in the Codeset Manager to view the Code Value Grid.



Setting Mapping Grid View for Profiles

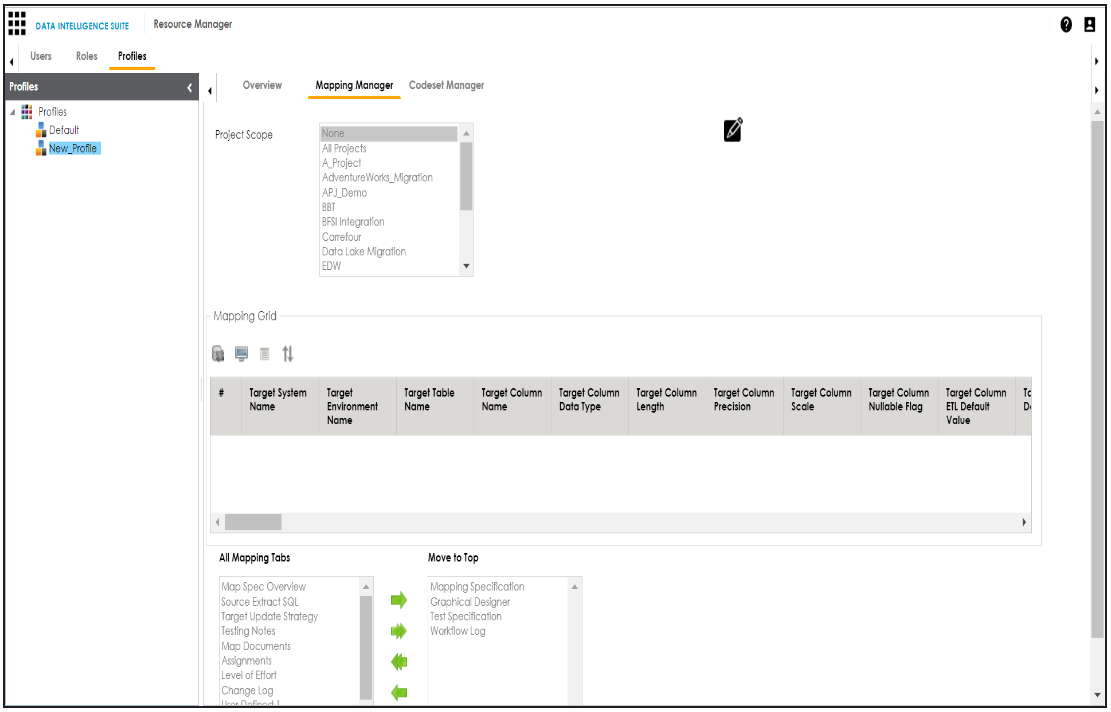
You can set the mapping grid view for a profile and specify the project scope for the view. You can set the following in the mapping grid view:

- Column order
- Column visibility
- Header Menu

To set the mapping grid view for profiles, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Resource Manager** > **Profiles**.
2. Under the **Profiles** pane, click the profile to be set.
3. Click the **Mapping Manager** tab.

   The following page appears.



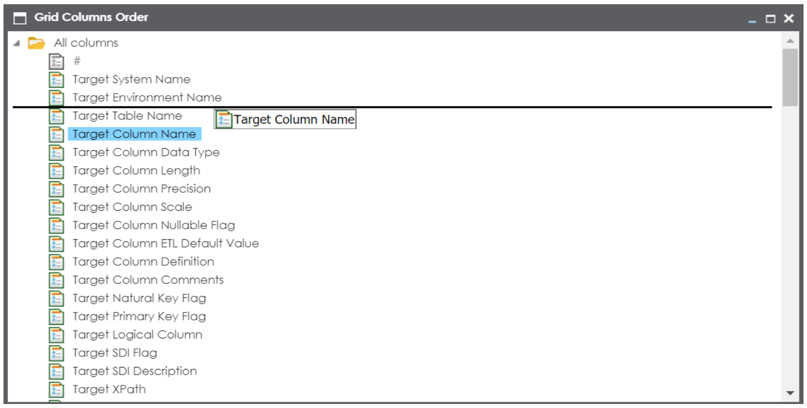
4. Click .
5. Use the following options:

Project Scope

The project scope defines the applicability of the profile on the projects in the Mapping Manager. For example, if the project scope is **All Projects** then the profile will be applicable to all the projects in the Mapping Manager. To select multiple projects, use ctrl key.

Change Column Order ()

Click and then drag and drop the columns in the desired order.



Header Menu ()

Click , and select the <column> check boxes to make them visible.

Reset Column Ordering ()

To reset mapping grid column order, click .

Reset Column Visibility ()

To reset mapping grid column visibility, click .

6. Use ( or ) to move mapping tabs from **All Mapping Tabs** box to **Move to Top** box.
7. Use ( or ) to move mapping tabs from **Move to Top** box to **All Mapping Tabs** box.

   Note: Mapping tabs present in **Move to Top** box appears on top in the mapping grid.

Setting Code Value Grid View for Profiles

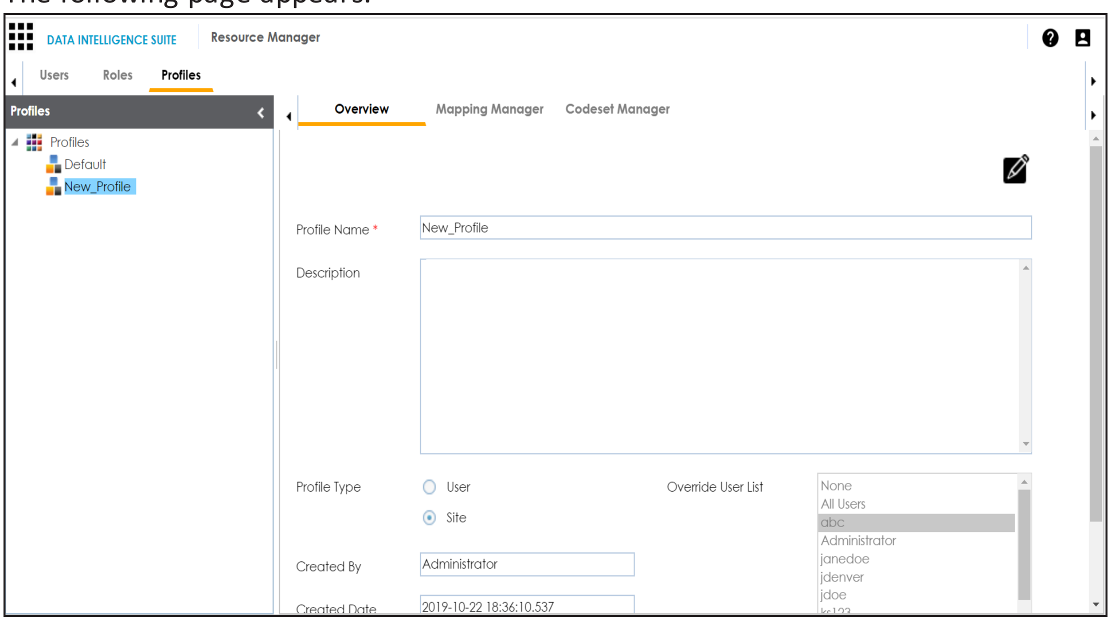
You can set code value grid for a profile and customize its:

- Header menu
- Column order
- Column visibility

To set the code value grid for profiles, follow these steps:

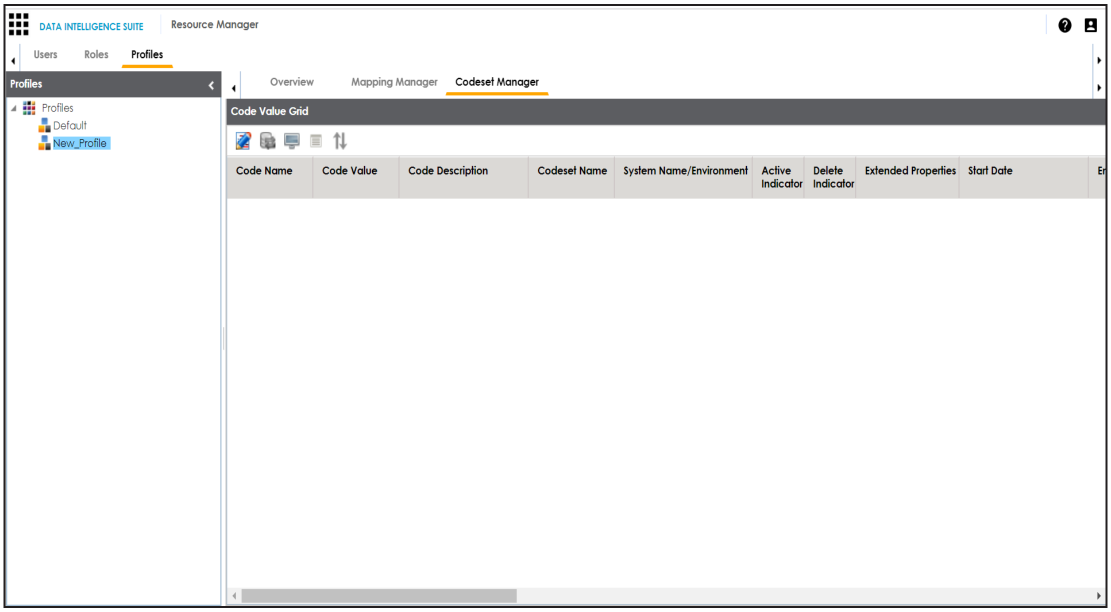
1. Go to **Application Menu** > **Data Catalog** > **Resource Manager** > **Profiles**.
2. Click the profile to be set.

   The following page appears.



3. Click **Codeset Manager** tab.

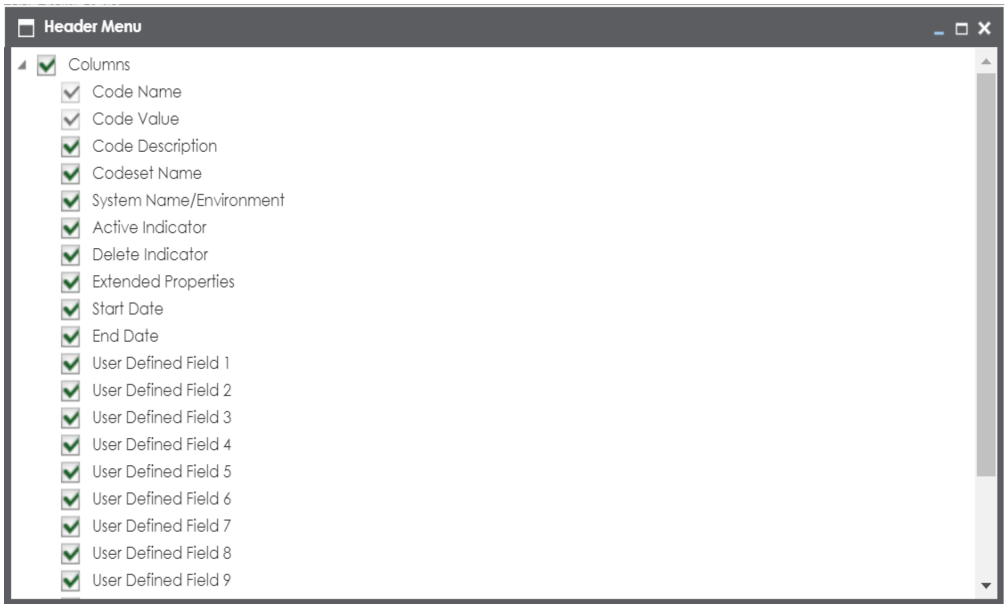
The following page appears.



4. Click .
5. Use the following options:

Header Menu ()

Click , and select the <column> check boxes to make them visible.



Change Column Order (⇅)

Click ⇅ and then drag and drop the columns in the desired order.

Reset Column Ordering ()

To reset Code Value Grid column order, click .

Reset Column Visibility ()

To reset Code Value Grid column visibility, click .

6. After setting the code value grid view, click .

   Code value grid view is set.