



erwin Data Modeler

DM Connect for DI

Release 2020 R2

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Contents

Legal Notices	2
Contents	4
DM Connect for DI Overview	6
Workflow	6
Prerequisites	8
erwin Mart Server System Requirements	8
erwin DI Suite System Requirements	9
Database Server Specifications	10
Permissions	11
Minimum erwin Mart Permissions	11
Minimum erwin DI Suite Permissions	11
erwin DI Suite DocumentsPath	12
Configuration	14
Scenario: Schedule Jobs to Export Data Models to erwin DI Suite	16
Case I: Run Job	21
Case II: Modify Job	21
Case III: Recurring Job-No Change in Models	22
Case IV: New Model in the Folder	22
Scenario: Import Source and Target Data into Mapping Manager	23
Scenario: NSM Files	25
Case I: One NSM File, Multiple Models	26
Case II: Multiple NSM Files, Multiple Models	26

Scenario: View Logs	27
Reference: Data Sharing between erwin DM and erwin DI Suite	28
Limitations	31

DM Connect for DI Overview

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

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

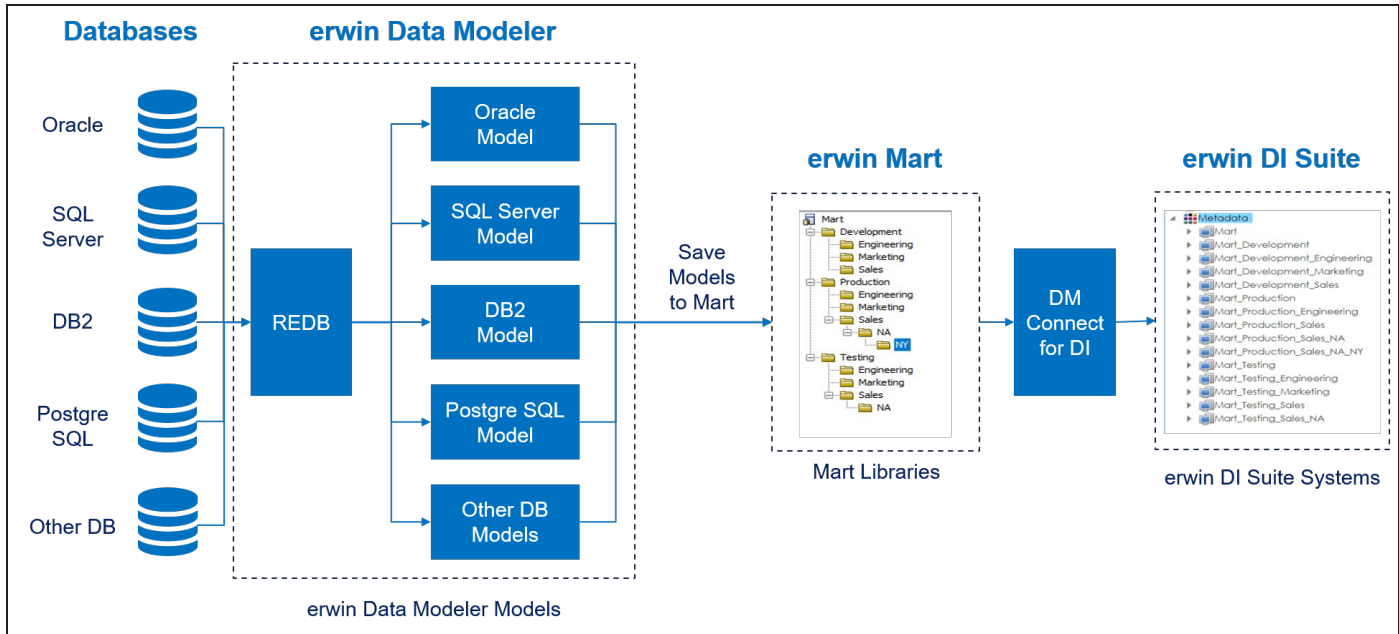
Workflow

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

erwin Mart Administrator (MA) provides you with a way to interact with erwin MS. It also acts as an interface between erwin DM and erwin DI Suite. It enables you to schedule jobs to export data models and data sources from your mart repository to erwin DI Suite's Data Catalog. Further, it integrates the naming standards set up on your models into the Business Glossary Manager.

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

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



Prerequisites

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

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

erwin Mart Server System Requirements

Refer to the following tables for minimum system requirements.

Parameter	Requirement
Hardware/Workstation	<ul style="list-style-type: none">• 2 GHZ or higher dual core processor• 4 GB RAM (8 GB or more for large marts)• 10 GB of disk space or more as required to support your specific mart
Operating System	<ul style="list-style-type: none">• Microsoft Windows 8.1• Microsoft Windows 10• Microsoft Windows Server 2012, R2• Microsoft Windows Server 2016• Microsoft Windows Server 2019• Microsoft .NET Framework 4.0 and above• All current Microsoft Windows critical updates
Database	<ul style="list-style-type: none">• Microsoft SQL Server 2016 SP2 or the certified versions 2017 and 2019 <p>Note: For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2</p> <ul style="list-style-type: none">• Oracle 12c or the certified versions 12c R2, 18c, and 19c

	<ul style="list-style-type: none"> • PostgreSQL through V9.6.2 and certified on 9.6.15, 10.10, and 11.5. Additionally, PostgreSQL is certified as follows: <ul style="list-style-type: none"> ▪ version 11.6 for Amazon RDS and Amazon Aurora ▪ version 12.3 for Amazon RDS
erwin Mart Administrator Web Client - Browser	<ul style="list-style-type: none"> • Microsoft Internet Explorer v10 or newer • Mozilla Firefox v30 or newer • Google Chrome v30 or newer • Apple Safari 6 or newer
Tomcat Memory	<p>In the C:\Program Files\erwin\Mart Server r9\Tomcat64\bin\startup.bat file, update the following setting to increase the RAM in MBs:</p> <pre>set "CATALINA_OPTS=-Xms256m -Xmx1028m"</pre>
Tomcat Memory (Large Mart)	<p>In the C:\Program Files\erwin\Mart Server r9\Tomcat64\bin\startup.bat file, update the following setting to increase the RAM in MBs:</p> <pre>set "CATALINA_OPTS=-Xms1024m -Xmx12288m" That is, (1GB - 12GB)</pre>

erwin DI Suite System Requirements

Parameter	Requirement
Hardware/Workstation	<ul style="list-style-type: none"> • VM or Dedicated Physical Server • Processor - 64-bit, minimum 4 cores • RAM: <ul style="list-style-type: none"> • 16 GB for limited user POCs • 32-64 GB for enterprise production deployment • Hard Disk Drive - 200-300 GB
Operating System	<ul style="list-style-type: none"> • Microsoft Windows - Windows 10, Windows Server 2012 and above • CentOS 7 • RHEL 6.6 and 7.2 • Amazon Linux 2
Database	<ul style="list-style-type: none"> • SQL Server 2016 SP2 and higher

	<p>Note: For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2</p> <ul style="list-style-type: none"> • Oracle 11g and higher
Browser	<ul style="list-style-type: none"> • Google Chrome v28.0 or higher • Mozilla Firefox v16 or higher • Microsoft Edge
Web Servers	Apache Tomcat v8.5.35/41
Web Server Memory Allocation	Allot at least 50 percent of available memory. For example, if available memory is 16GB, allot at least 8GB.
Web Client Workstation	<ul style="list-style-type: none"> • Processor - i3 or higher • RAM - 8GB minimum

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

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

Database Server Specifications

The following table lists database server specifications:

Parameter	Requirement
Server Type	Dedicated standalone server
Processor	64-bit, minimum 4-8 cores
RAM	16-32 GB
Hard Disk Drive	250-500 GB
Tablespace	50 GB, minimum

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

Permissions

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

Minimum erwin Mart Permissions

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

- Administrator
- Architect

Minimum erwin DI Suite Permissions

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

Mapping Manager
Projects/Create Project
Projects/Mappings/Create Mapping
Projects/Project Tabs/Project Details/View Project Details

Business Glossary Manager

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

erwin DI Suite DocumentsPath

To be able to export data from erwin Data Modeler (DM) to erwin DI Suite, ensure that you update the **iccdocuments.properties** file in erwin DI Suite as follows:

- **Windows:** If you change the default installation location, follow these steps:
 1. Open the **iccdocuments.properties** file from the following location:
Apache Software Foundation\Tomcat 8.5\webapps\<Application Name>\WEB-INF\configuration\properties\iccdocuments.properties
 2. Change the **DocumentsPath** value to the current installation location:
<drivename>:/<application name>

For example, consider you changed the installation location from the default location to:

D:\Apache Software Foundation\Tomcat 8.5\webapps\erwinDISuite\WEB-INF\configuration\properties.

Then, change the **DocumentsPath** to:

D:/erwinDISuite

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

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

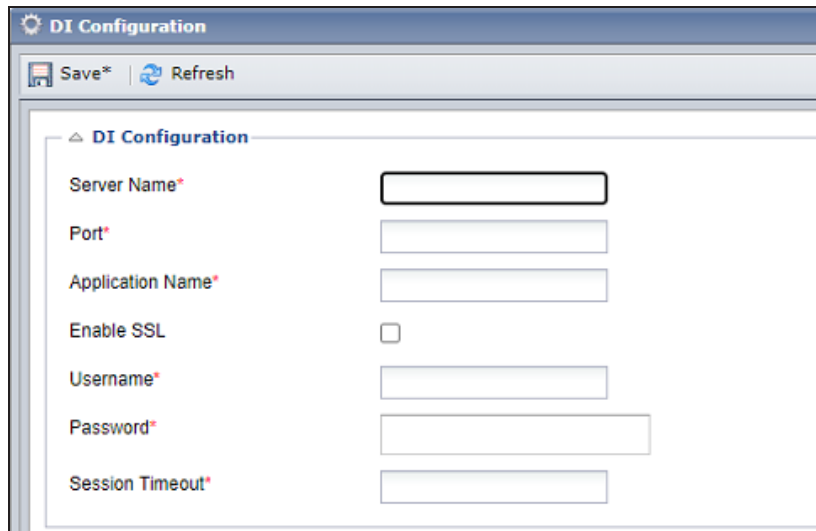
Configuration

To use DM Connect for DI, you need to configure your erwin Data Intelligence Suite (DI Suite) application in erwin Mart Administrator. This is the application to which DM Connect for DI would export data models, data sources, and naming standards.

To configure erwin DI Suite, follow these steps:

1. On the Admin Panel, click **DI Configuration**.

The DI Configuration page opens.



The screenshot shows a web browser window titled "DI Configuration". At the top, there are "Save*" and "Refresh" buttons. Below the title bar, the page content is organized into a form with the following fields:

- Server Name***: A text input field.
- Port***: A text input field.
- Application Name***: A text input field.
- Enable SSL**: A checkbox.
- Username***: A text input field.
- Password***: A password input field.
- Session Timeout***: A text input field.

2. Configure your erwin DI Suite's connection parameters as follows:

Server Name

Specify the server address, where erwin DI Suite is installed.

Port

Specify the port on your server that is used for erwin DI Suite.

Application Name

Specify the name of your erwin DI Suite Application.

Enable SSL

Specify whether you want to connect to the server through a secured connection

Username

Specify your erwin DI Suite user name.

Password

Specify your erwin DI Suite password.

Session Timeout

Specify the erwin DI Suite's session time out duration in minutes.

3. Click Save.

Your connection is tested and saved.

Scenario: Schedule Jobs to Export Data Models to erwin DI Suite

A job converts a model to erwin DI Suite compatible format and then,

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

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

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

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

To schedule a job, follow these steps:

1. Click **DM Connect for DI > Add Job**.
The Add Job page opens.

2. Set up job parameters as follows:

Select Models

Select models from mart catalog to export. To view selected models, click the **Selected Models** icon.

Include NSM

Select whether naming standards must be exported. A catalog named by the NSM file is created under **Business Glossary Manager > DM NSM Files** custom asset.

Note: Ensure that the DM NSM Files asset is enabled in **erwin DI Suite > Business Glossary Manager Settings**.

System Name

Enter a system name. This corresponds to System in Metadata Manager.

Environment Name

Use the predefined macros to set the environment name. This corresponds to Environment in Metadata manager.

Note: For system and environment names, following special characters are allowed:

- **System:** - (hyphen), _ (underscore), and space
 - **Environment:** @ (at sign), \$ (dollar sign), & (ampersand), / (slash mark), - (hyphen), _ (underscore), and space
- All other special characters are replaced with _ (underscore).

Export Options

Select a suitable export option:

- **Add New:**
 - If an environment exists, this option adds any new tables or columns to it.
 - If an environment does not exist, this option creates an environment and adds tables and columns to it.
- **Update Existing + Add New:**
 - If the existing model objects have changed, this option exports the updates to the existing model objects in erwin DI Suite.
 - Also, it exports any new objects in the model to erwin DI Suite.
- **Update Existing + Add New + Invalidate:**

Along with the functionality of Update Existing + Add New option, this option invalidates any deleted tables or columns.
- **Delete & Reload:**

This option deletes all the tables and columns. Then, it exports them again.

Version

Select whether a version of an existing environment must be created. This archives the existing environment.

Job Name

Specify a job name.

Scheduled Job On

Select the date and time at which the job must run.

Job Interval

Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly.

Notify Me

Select whether a notification is sent to you when the job status changes. This enables the Notification Email and CC List fields.

Notification Email

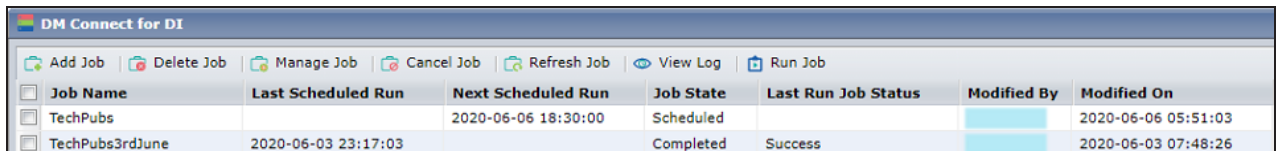
Specify the email address at which you want to receive the notification.

CC List

Specify a semi-colon-separated list of email addresses that must receive the job notification

3. Click **Submit**.

The job is added to the queue for execution with its **Job State** set to Scheduled.



The screenshot shows the 'DM Connect for DI' interface. At the top, there are several action buttons: Add Job, Delete Job, Manage Job, Cancel Job, Refresh Job, View Log, and Run Job. Below these buttons is a table with the following columns: Job Name, Last Scheduled Run, Next Scheduled Run, Job State, Last Run Job Status, Modified By, and Modified On. The table contains two rows of data.

Job Name	Last Scheduled Run	Next Scheduled Run	Job State	Last Run Job Status	Modified By	Modified On
TechPubs		2020-06-06 18:30:00	Scheduled			2020-06-06 05:51:03
TechPubs3rdJune	2020-06-03 23:17:03		Completed	Success		2020-06-03 07:48:26

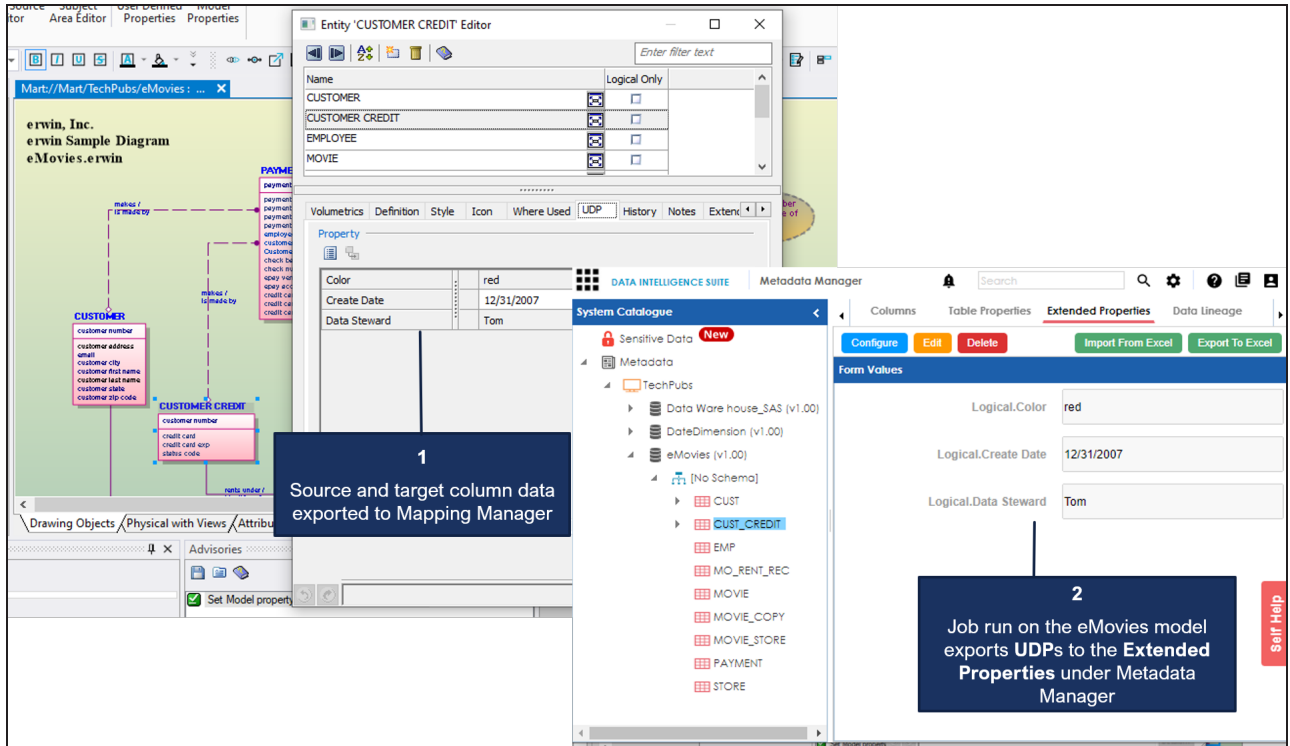
The job runs according to the schedule and exports data model to Metadata Manager and naming standards to Business Glossary Manager.

The screenshot displays the erwin Mart Administrator interface. At the top, the 'erwin Mart Administrator' title is visible. Below it, the 'DM Connect for DI' section contains a table of jobs. A callout box labeled '1' points to a job entry: 'Job Name: TechPubsEMovies, Last Scheduled Run: 2020-06-08 19:43:39, Job State: Completed, Last Run Job Status: Success, Modified On: 2020-06-08 19:42:59'. The text in the callout reads: 'Job run on TechPubsModel, TechPubs NSM file attached to the model'.

The 'Metadata Manager' section shows a 'System Catalogue' on the left with a tree view including 'TechPubsModel (v1.00)'. A callout box labeled '2' points to this model, with the text: 'Model exported to Metadata Manager'. The main area shows a 'Metadata Summary' table with columns for '#', 'System', 'Business Purpose', and '# of Environments'. The table lists three systems: 'Technical_Publications', 'TechnicalPublications', and 'TechPubsEMovies'.

The 'Business Glossary Manager' section shows a 'Workspace' with 'DM NSM Files' including 'MyMovieList (6)' and 'TechPubs (6)'. A callout box labeled '3' points to the 'TechPubs (6)' folder, with the text: 'TechPubs NSM file exported to Business Glossary Manager'. Below this, the 'DM NSM FILE Summary' section shows a list of files in 'Compact View', including 'TechPubs CUST' and 'TechPubs EMP'.

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



Case I: Run Job

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

Case II: Modify Job

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

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

Case III: Recurring Job-No Change in Models

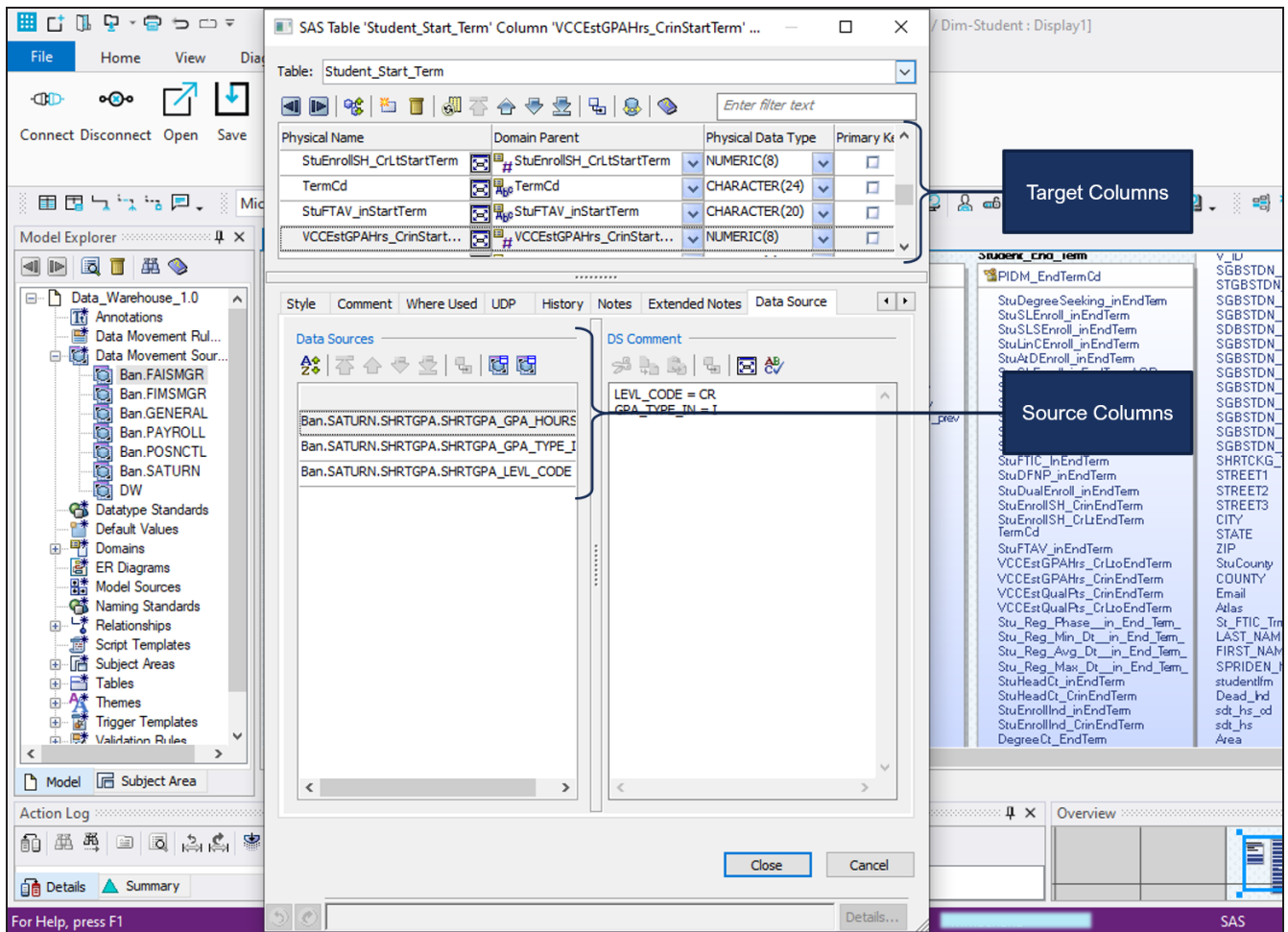
Recurring jobs run based on the Job Interval you set while scheduling them. If the models selected in the job have not changed between job intervals, the job still runs according to the schedule. However, no data is exported to erwin DI Suite.

Case IV: New Model in the Folder

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

Scenario: Import Source and Target Data into Mapping Manager

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



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

erwin erwin Mart Administrator

DM Connect for DI

Add Job | Delete Job | Manage Job | Cancel Job | Refresh Job | View Log | Run Job

Job Name	Last Scheduled Run	Next Scheduled Run	Job State	Last Run Job Status	Modified By	Modified On
TechnicalPublications	2020-06-08 20:13:16		Completed	Success	mmacharla	2020-06-08 20:11:50
<input checked="" type="checkbox"/> DimensionalModel	2020-06-08 19:43:39	2020-06-08 09:15:00	Scheduled	Success	mmacharla	2020-06-08 19:42:59

1
Job run on a Dimensional model, with associated Data Sources

DATA INTELLIGENCE SUITE Mapping Manager

Workspace Mappings

- Mappings
 - Transformations
 - Projects
 - Data_Ware_house_SAS_1__prc
 - Transformations
 - Test Cases
 - Mappings
 - Data_Ware_house_SAS_1__prc
 - MappingTargets

2
Source and target column data exported to Mapping Manager

Mapping Specification Graphical Designer Test Specification Workflow Log

[Data_Ware_house_SAS_1__prc] Profiles: Default

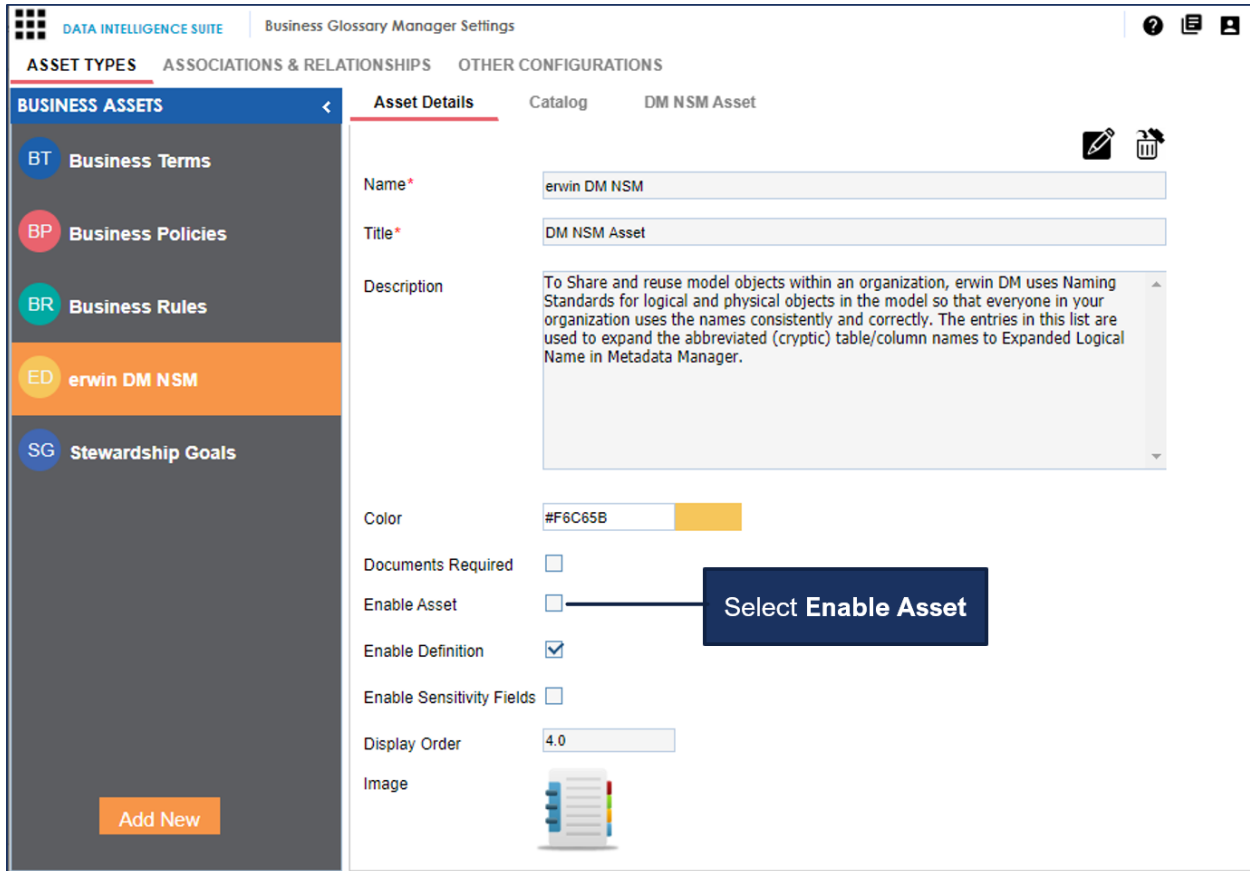
#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	OPROD	ban-prod.valenciacc.e	SGBSTDN	SGBSTDN_ADMT_C	VARCHAR2(2)		
2	OPROD	ban-prod.valenciacc.e	SGBSTDN	SGBSTDN_EXP_GR	DATE		
3	OPROD	ban-prod.valenciacc.e	SGBSTDN	SGBSTDN_SECD_R	VARCHAR2(1)		

Records from 1 to 100 Page 1 100 rows per page

Scenario: NSM Files

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

Note: Ensure that the erwin DM NSM asset is enabled under **erwin DI Suite > Business Glossary Manager Settings**.



Under the erwin DM NSM asset, each unique NSM file is added as a catalog.

erwin Mart Administrator

DM Connect for DI

Job Name	Last Scheduled Run	Next Scheduled Run	Job State	Last Run Job Status	Modified By	Modified On
TechPubsDept		2020-06-15 18:30:00	Scheduled		mmacharla	2020-06-15 05:52:23

BUSINESS ASSETS < CATALOG VIEW

Workspace < erwin DM NSM

- eMovies (5)
- TruistABBV (245)

DM NSM ASSET Summary

Compact View | Grid View

Search [] Items Per Page 50 Page 1 PREVIOUS NEXT

- eMovies CUST No Description available
- eMovies EMP No Description available

1 Job with 2 models; 2 NSM files, eMovies.nsm and TruistABBV.nsm

2

- 2 catalogs based on the NSM files attached to the models are created.
- Glossary words from each files are added to the respective catalogs.

Case I: One NSM File, Multiple Models

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

Case II: Multiple NSM Files, Multiple Models

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

Scenario: View Logs

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

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

The screenshot displays the erwin Mart Administrator interface. At the top, the title bar reads "erwin erwin Mart Administrator" with a user profile icon, "LOGOUT", and "Help" links. Below the title bar, a navigation bar contains several icons: "Add Job", "Delete Job", "Manage Job", "Cancel Job", "Refresh Job", "View Log", and "Run Job".

The main content area features a table with the following columns: "Job Name", "Last Scheduled Run", "Next Scheduled Run", "Job State", "Last Run Job Status", "Modified By", and "Modified On". The table contains two rows for the "TechPubs" job:

Job Name	Last Scheduled Run	Next Scheduled Run	Job State	Last Run Job Status	Modified By	Modified On
<input type="checkbox"/> TechPubs	2020-05-26 12:11:27		Completed	Partial Success		2020-05-26 12:10:28
<input checked="" type="checkbox"/> TechPubs	2020-05-26 12:05:30		Completed	Partial Success		2020-05-26 12:04:53

A callout box with a blue background and white text points to the "View Log" icon in the navigation bar, stating: "Select a job and click here to view its log".

A "Logs" window is open in the foreground, displaying a list of log entries for the selected job. The log entries include timestamps and details of the job execution, such as "Start Job Execution", "Start Create/Get SystemName", "Start Export", "Preparing data for model export", "Evaluated Environment Name", "Start Report File Generation", "Entering Query ReportAPI", "Instance of XMLParser created", "xmlReport is parsed successfully", "End(Success) Report File Generation", "Start Existence check for environment", and "Start Create/Get Environment Name".

At the bottom of the interface, there is a footer with the text "Copyright © 2020 erwin, Inc. - About · Privacy · Legal · Contact" and social media icons for Twitter, Facebook, LinkedIn, and YouTube, followed by "Version 2020 R2".

Reference: Data Sharing between erwin DM and erwin DI Suite

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

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

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

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

COLUMN-COLUMN	
erwin Data Modeler	erwin DI Suite
Domain Parent	Data Domain
Physical Data Type	Data Type, Precision, Length, Scale
Null Option	Nullable Flag

Foreign Key	Foreign Key Flag
Primary Key	Primary Key Flag
Child Column Name	Foreign Key Column Name
Child Table Name	Foreign Key Table Name

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

NSM-erwin DM NSM	
erwin Data Modeler	erwin DI Suite
NSM File Name	Catalog Name
Abbreviation	Asset Name
Glossary Word	Definition

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

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

ment Table)	
Source Column (Or Data Movement Column)	Source Column
Source Column Datatype (Or Data Movement Column Datatype)	Source Column Datatype and length Note: Check whether datatype and length are added to the corresponding fields. If not, you need to correct it manually.

Limitations

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

- If table's or column's Definition property is updated in a model, the update is not exported when the job is run again. To export the updated Definition, set the job's Export Options to Delete & Reload.
- When you apply an NSM file to a model, it is applied at the model-level. Therefore, it is applied to all versions of the model.