

Centers for Medicare & Medicaid Services

Erwin Data Intelligence Suite 10.2

Quick Start User Navigation Guide





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1. About this guide

This user navigation guide provides CMS-CPI Application Data Stewards and Business Analysts with quickstart instructions for accessing key menus, action icons, options, and functionalities in the DM/DG Erwin Data Intelligence Suite and Business User Portal software.

Utilize this guide as a go-to resource for locating Erwin Data Intelligence Suite (DI) and Business User Portal (BUP) components and functionalities covered throughout the DM/DG webinar training. Access the latest knowledge base stored within the Enterprise DMDG platform and available at the following link: <u>https://confluenceent.cms.gov/display/DMDG/Training+Materials</u>

The Erwin Data Intelligence Suite and Business User Portal (Erwin DI BUP) is a commercial off-the-shelf (COTS) metadata management and governance software developed by Erwin Quest. Access to the tool is regulated by the Centers for Medicare and Medicaid Services Enterprise User Association (EUA). (See page four for a list of EUA job codes required to access Erwin DI BUP).

Application Data Stewards may request multiple EUA job codes to access all tools required to fulfill their job responsibilities.

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2. DM/DG user roles

DM/DG defines three end user roles or classifications. Each role requires a unique EUA job code for the Validation and Production environments. Roles are defined below:

Application Data Steward

Responsible for metadata management and data governance operations for a given CMS-CPI Application:

- Create, Read, Update, and Delete (CRUD) permissions to your own Application System within the DM/DG Erwin Data Intelligence Business User Portal (Erwin DI BUP) tool.
- Read-only (RO) permissions to all other Applications Systems within the DM/DG tool. This role requires an additional "Data Reviewer" Job Code.
- Read-only (RO) access to the Business Glossary Manager.

Business User Portal (BUP)

• RO permissions to all Applications in the Business User Portal.

Data Reviewer

• RO permissions to all Application Systems within the DMDG Erwin DI BUP tool.

Production Job Codes:

- DMDG_
- DMDG_____
- DMDG_

Validation:

- DMDG_
- DMDG_
- DMDG_

Once Job Code approval is granted, access to Erwin DI BUP is automatically set up.

For detailed information on job codes, including a table of listing all Application Systems inputs, please visit the "New DM/DG Erwin DI BUP Users" documentation page on CMS Enterprise Confluence at the following link: https://confluenceent.cms.gov+s



3. How to login

Validation

https://-val.cms.gov/

Production

https://-.cms.gov/

- 1. Enter your EUA credentials.
- 2. Check the box next to "I accept & agree to the terms of the EULA" to complete the login process.
- 3. Be aware that if you have three failed login attempts, your account will be temporarily locked for security purposes.

	Centers for Medicare & Medicaid Services
Centers for Medicare and Medicaid - CPI Data Management Data Governance (DMDG)	erwin
* This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network.	Data Intelligence
* This system is provided for Government authorized use only.	User Name
Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties.	
* Personal use of social media and networking sites on this system is limited as to not interfere with official work dutes and is subject to monitoring. * By using this system, you understand and consent to the following:	Password I accept & agree to the terms of the EULA
 The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this system. 	SIGN IN Can't access your account?
- Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose	Licensed To: CUST10432 CMS Sandbox
You may reach the DMDG team at: dmdg support@cms.hhs.gov [Validation Environment]	



4. Login errors

Follow the steps below if your login attempt results in the "Bad Credentials" error message.

- 1. Confirm that your username is correct.
- 2. Confirm that your password is correct.
- 3. Double-check that your EUA job code(s) are accurate and that you have obtained approval.
- 4. If you have any questions or concerns, please don't hesitate to reach out to the DM/DG team by sending an email to -<u>support@cms.hhs.gov.</u>

	Centers for Medicare & Medicaid Services
	erwin
	Data Intelligence
	ER1001: Bad Credentials
User Nam	8
Password	
🔽 I ac	cept & agree to the terms of the EULA
	SIGN IN
	Can't access your account?
	Licensed To: Sandbox CUST10432 CMS SO18282

For more information about login errors, see "Login Issues" at the link below: <u>https://confluenceent.cms.gov/display/DMDG/DMDG+Login+Issues</u>



5. Erwin DI landing page

The default landing page is Metadata Manager in the System Catalogue. *Please note that the Quest Erwin spelling of 'catalogue' rather than 'catalog' is used throughout the System Catalogue interface.

DATA INTELLIGENCE SUI	ITE	Metadata Manager		A Smarth		Q 🗢 🛛 🕜 🔟
ystem Catalogue	< Metad	ata Summary				
🔒 Sensitive Data	•		ure Extended Properties Scheduled Jobs Business Purpose	# of Environments	Created By	
Metadata		System	Business Purpose	# or Environments	Created By	Created Date
APS ONC						
	1	APS	Advanced Provider Screening	1	API	2019-10-29 16:22:52.657
 DOM DesMD 	2	CNC	Compromised Number Checklist	1	API	2019-10-29 16:22:13.02
FPS MED	з	DMA	Division of Modeling & Analytics	1	API	2019-10-29 16:23:20.243
PPES	4	DOM	Division of Outcomes Measurement	1	API	2020-03-04 18 16:41.807
OnePI OPP	5	esMD	Electronic Submission of Medical Documentation	1	API	2019-10-29 16:21:45:313
 PECOS UCM 	5 55	FPS	Fraud Prevention System	1	API	2019-10-25 07:04:36.807
	7	MED	Medicare Exclusion Database	1	API	2019-10-10 15:37:36.177
	8	NPPES	National Plan and Provider Enumeration System	2	API	2019-10-25 07:00:14:383
	9	OnePI	One Program Integrity	1	API	2019-10-29 16:21:56.62
	10 OPP	OPP	Open Payments System	1	API	2019-10-24 18:09:28:347
	11	PECOS	Provider Enrollment, Chain and Ownership System	1	API	2019-10-25 07:04:12:45
			(c) ∈ Records from 1 to 12 ⇒ ⇒)	Page 1 • 25 rows per page		
		ata Manager Dashboard				

The landing page provides access to the navigation bar and Erwin "Unified Application Menu." Use this menu to navigate to Data Catalogue, Data Literacy, and Micellaneous modules within the application.

DATA INTELLIGENCE SUITE	Metadata Manager 🛕 Searc	Q 💠 🛛 🕑 🛄 😝 .								
	E SUITE	The Erwin DI Unified Application Menu.								
Erwin DI Module	Metadata Ma Title page.	anager								
Use the arrow icons to expand or collapse content.										





6. Erwin DI results window

The user interface (UI) panel is organized with a left-hand pane and central results window. The left-hand pane of the Metadata Manager displays the scanned (ingested) metadata now stored in the Metadata Catalogue. The central results windowpane displays the metadata.

DATA INTELLIGENCE SUITE		tadata Manage	r	L Search	🔺 Search 🔍 🗘 🖉 🛄 🧲						
System Catalogue <	Metadata	Summary					-				
8 Sensitive Data	< Data	Dictionary	Configure Extended Properties Scheduled Job	S			•				
4 Metadata	#	System		Business Purpose	# of Environments	Created By	Created Date				
▶ ↓ APS											
> ♀ CNC	1	APS		Advanced Provider Screening	1	API	2019-10-29 16:22:52.657				
→ □ DOM → □ esMD	2	CNC		Compromised Number Checklist	1	API	2019-10-29 16:22:13.02				
	3	DMA		Division of Modeling & Analytics	1	API	2019-10-29 16:23:20.243				
→ ↓ NPPES	4	DOM		Division of Outcomes Measurement	1	API	2020-03-04 18:16:41.807				
	5 esMD	Electronic Submission of Medical Documentation	1	API	2019-10-29 16:21:45.313						
→	6	FPS		Fraud Prevention System	1	API	2019-10-25 07:04:36.807				
	7	MED		Medicare Exclusion Database	1	API	2019-10-10 15:37:36.177				
	8	NPPES		National Plan and Provider Enumeration System	2	API	2019-10-25 07:00:14.383				
	9	OnePI		One Program Integrity	1	API	2019-10-29 16:21:56.62				
	10	OPP		Open Payments System	1	API	2019-10-24 18:09:28.347				
	11	PECOS	Rocult		1	API	2019-10-25 07:04:12.45				
	12	UCM	NESUR	Unitied Case Management	1	API	2019-10-25 15:36:14.443				
Catalog				I< < Records from 1 to 12 > >I O Page	1 • 25 rows per page						
	Metadata Manager Dashboard										



7. Erwin DI Catalogs

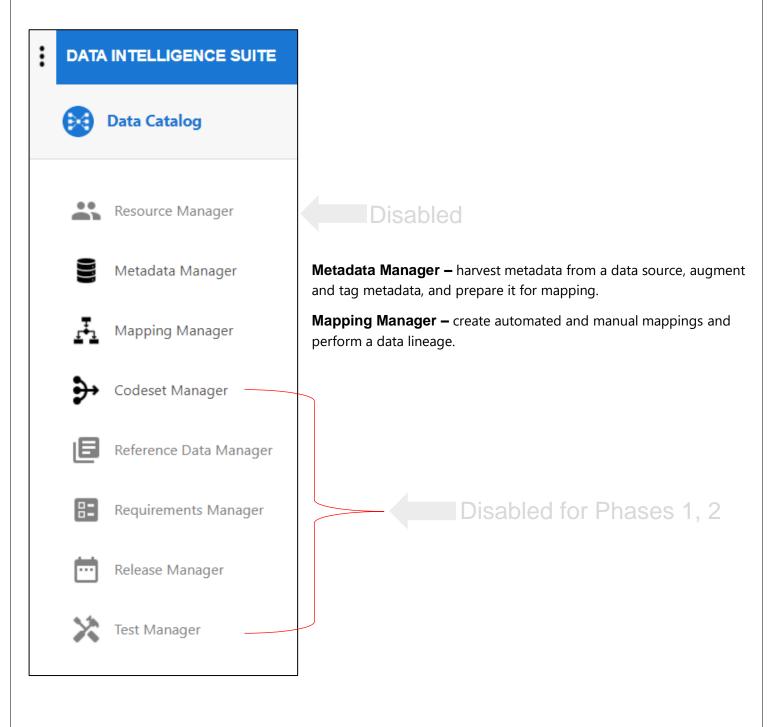
The application is organized into metadata components, where Application Data Stewards access functionalities for scanning metadata, flagging metadata with Sensitive Data Indicators, and creating Mapping Specifications.

Below is an enlargement of the Erwin Unified Application Menu.

		enu options. Selecting the eous, will activate the fund	e desired component, such a ctionalities within.
DATA INTELLIGENCE SUITE Data Catalog Data Literacy Miscellaneous			
Settings	Data Catalog	Data Literacy	Miscellaneous
	Data Catalog	Data Literacy	Miscellaneous
Ervin CMS.gov	 Resource Manager Metadata Manager Mapping Manager Codeset Manager Reference Data Manager Requirements Manager Release Manager Test Manager 	Business Glossary Manager Image: AlMatch Image: Business User Portal	Image: </th

8. Data Catalog

The Data Catalog stores all of the application system's metadata. Application Data Stewards scan and augment metadata, create mappings, and make business terms, policies, and rules, associations. All important workflow for Application Data Stewards takes place within the Data Catalog. The following components are currently disabled: Resource Manager, Reference Manager, Requirements Manager, Release Manager, and Test Manager. They may become available in a future release.





9. Data Literacy

The Data Literacy module supports CMS-standardization of Business Terms, Business Policies, and Business Rules across CMS-CPI Application Systems. Within Data Literacy, the Business Glossary Manager contains catalogs of CMS-standard business terms. Application Data Stewards have R/O access to view and download business terms, policies, and rules, as well as to view Mind Maps from the Business Glossary Manager.

:	DATA INTELLIGENCE SUITE	
	Data Catalog	
	Data Literacy	
	Business Glossary Manager	Business Glossary Manager – Contains data dictionaries that make the relationship between semantic definitions and physical data dictionaries, mappings, and lineages easier to understand.
	퀵 AlMatch	Disabled Phase 1, 2
	Business User Portal	

For more information about CMS standards, such as the National Provider Identification value (NPI), please refer to the DM/DG Documentation on Terms and Policies at the following link: <u>https://confluenceent.cms.gov/display/DMDG/Standardized+CMS+Business+Terms+and+Policies</u>



10. Miscellaneous

Miscellaneous provides downloadable 'Erwin Defined Templates' accessible from the 'Download Template' section. These templates assist Application Data Stewards in formatting metadata uploads for optimal accuracy. Please note that the Reporting Manager, Workflow Manager, Plugins, and Automation Framework modules are disabled until later phases.



11. Data Catalog – System-level functionalities

Erwin DI is organized into a System Hierarchy, beginning with the Application Data Steward's own application system. Functionalities can be accessed at the System, Environment, Table, or Column level. Download the training documentation for 'Lesson 1 Metadata Manager System-level' using the link provided below: <u>https://confluenceent.cms.gov/display/DMDG/Training+Materials</u>.

Functionalities are accessed from the tab menu or by right-clicking on the System, Environment, Table, or Column object:

- New Document
- Report-System Information
- Report-Data Dictionary]
- Data Dictionary
- System Details
- Data Lineage
- Mind Map
- Associations
- System Documents
- Scheduled Jobs

Below is a screenshot and list of System-level tab and drop-down menu functionalities.

DATA INTELLIGENCE SUITE Metadata Ma	anager				L Search		Q 🔯 😗	₩ 8		
System Catalogue <	Data Dictional	System Details	Extended Properties [Data Lineage Mind Map	Associations System Doo	cuments Configure Extended I	Properties Scheduled Jobs	•		
🔒 Sensitive Data	Environment Listing									
🖌 📑 Metadata	# Environ	nment Name	Environment Type	DBMS Name	DBMS Schema Name	IP Address	Port	Last Load		
▶ ↓ APS										
DMDG DS Training DMDG TS DMDGTS New Environment New Environment New Document	dmdg-trai	ining-db	SQL Server Database	dmdg-training-db	BILLING, DBO, TREATMENT	dmdgdev-sql-svr-prototype.database	1433	05/05/2022		
FPS FPS Gat G	dmdg-trai	ining-file		MS Excel File				10/20/2021		
Pecosi Pecosi		moEnvironment		dmdg-training-db	BILLING,TREATMENT	dmdgdev-sql-svr-prototype.database	1433	07/05/2022		
UCM Gonfigure Expanded Logical Name View Workflow										
l⊋.	¢									
			K	< Records from 1 to 3 > >	Page 1 👻 📄 25 rows per p	page		>		



12. Metadata Manager – Environment, Table, Column functionalities

The functionalities for scanning metadata, flagging tables and columns with Sensitive Data Indicators and Classifications, running Lineage, and viewing Impact Analysis and Mind Map are accessed at the Environment, Table, or Column levels of Metadata Manager.

The list of Environment-level Drop-down functionalities includes:

- Export Environment
- Data Dictionary
- View Options
- ER Diagram

The list of Environment-level Tab Menu functionalities includes:

- Data Dictionary
- System Details
- Data Lineage
- Impact as Source
- Impact as Target
- Mind Map
- Associations
- System Documents
- Scheduled Jobs

Below is a screenshot of Drop-down and Tab Menus.

DATA INTELLIGENCE SUITE	Metadata Mana	ger					A S	earch			、 ⇔ ∣ @	• • •
System Catalogue	< s	Statistics										^
Gensitive Data✓ ■ Metadata		0 Total Tables	0 Tables With Expanded Logica Names	0 Total Columns	0/0 Columns With Expande Names		D/O y Key Columns	0/0 Total Foreign Key Colur	Medium (5 DQ Score	-6)		0
 → Q APS → DMDG DS Training 	•	Data Dictiona	ry Environment Details	Extended Properties	Data Lineage	Impact as Source	Impact as	Target Mind	Map Association	workflow Log	Documents	s Data
B dmdg-training-db Scan Met dmdg-training-file dmdg-training-file dmdgDemoEnviro H Validate E	Metadata Scan	Options	Table Name	Column Name	Logical Column Name	Column Comments	Column Definition	Sensitive Data Indicator (Y/N)	Sensitive Data Indicator (SDI) Classification	Sensitive Data Indicator (SDI) Description	Data Type	Length Pre
DMDGTS DMDGTS Export En FPS New Vers	nvironment sion									No Data Fo	und.	
Add Table Add Table Add Table Add Table Data Dict OnePI OueV View Opti PECOS1 Zedit Erwir	ionary ions	:										
Clone En	vironment ivironment											
Eil New Doc Advance	d Business Properties ironment Connector											
🚰 ER Diagn Configure View Wor S Assign Us	≥ Expanded Logical Name rkflow											
	<	<										>
		$\nabla_{\!$										€ →

The DM/DG Training curriculum offers instructions and best practices for using Metadata Manager functionalities. To access 'Lesson 2: Environments, Schemas, Tables, and Columns,' please download it from the Training page using the link below:

https://confluenceent.cms.gov/display/DMDG/Training+Materials.



13. Metadata Manager – Mapping Manager

Application Data Stewards create Mapping Specifications for Source to Target metadata in Mapping Manager. Within Mapping Manager, the left windowpane displays the list of Mappings and Projects for the Data Stewards' own application system. The center windowpane shows Mapping Details, and the right windowpane mirrors the Metadata Catalog:

DATA INTELLIGENCE SUITE	Mapping Manager									Search		Q ✿│ Ø Ⅲ ϴ		
Workspace Mappings			Mapping Search							ب	Metadata Catalogue			
🔺 就 Mappings		Марр	Mapping Details 🗈 🖱 🗸 🗸									🔺 📲 Metadata		
🙀 Transformations		#	Project Name	Subject Hierarchy	Map Name	Lock Status	Locked By	Locked Date	Workflow Status	Mapping State	Mapping Description	▶		
⊿ III Projects										_		▶		
▶ 📕 APS (0)			JCM		UCM Base Table to							▶		
▶ 📕 FPS Mapping (1)		1	Mapping		UCM MT Tables Mapping	a			Draft	In Progress		- 🖵 UCM		
Image: Provide the second s			UCM		UCM MT Tables to	0						 UCM DBMS Schema - Reporting (v1.00) 		
OPP (164)		2	Mapping		OnePI System Mapping	a			Draft	In Progress				
🔺 嚞 UCM Mapping (2)														
🙀 Transformations														
🍓 Test Cases														
🖌 📑 Mappings														
ICM Base Table to UCM MT	Tables Mapping (v1.00)													
UCM MT Tables to OnePI Sys	tem Mapping (v1.00)													
Left			Center						Right Metadata Properties					
									Code Mappings Catalogue					
<	•	-1	Reco	ords from 1 to 2 of 2								Specification Artifact Catalogue		
Published Mappings												Reference Table Catalogue		

Transformations provide Application Data Stewards with a page view of Transformation Details and access to the Transformation functionality icons. Below is a screenshot of Transformation Details. Refer to the next page for a diagram of functionality icons.

DATA INTELLIGENCE SUITE	Mapping M	anager					A Search				2, 🗢 🛛 🚱 🔟
orkspace Mappings	Transformation Det	ails									🌣 🗩 🏺 👘 🛙
Mappings	# Transformation	n Name	Informatica Pseudocode	Intended Use	Scope	Published	Created By	Created Date Time	Last Modified By	Last Modified Date Time	
Transformations											
Projects DMDG Training (1)	1 1-DataGov(Hight /9999)		To_date(mm/dd/yyyy,12 /31/9999)	DataGovernance rule - use on all projects	All Projects	Y	Administrator	2021-09-27 15-22 16 773	Administrator	2021-09-27 15-22-16.773	
n Transformations	2 2-DataGov(LowE	Date01/01/0001)	To_date(mm/dd/yyyy, 01/01/0001)	DataGovernance rule - use on all projects	All Projects	Y	Administrator	2021-09-27 15:22:16:773	Administrator	2021-09-27 15:22:16:773	
Mappings mest (v1.00)	3 3-DataGov(Avera	ageChum)	Count(active customers)/(Count of Cancelled Customers for current month)	DataGovernance rule - use on all projects where financial reports are viewed and Churn KPIs are used.	All Projects	Y	Administrator	2021-09-27 15:22:16:773	Administrator	2021-09-27 15:22:16:773	
+ 🍶 OnePl (0)	4 ABORT		ABORT(%1)	ETL Built-In Transformation: Stops the session and issues a specified error message to the session tog file. When the integration Service encounters an ABORT function if stops transforming data at that row. It processes any rows read before the session aborts and loads them based on the source- or target-based commit interval and the buffer block size defined for the session.	All Projects	Y	Administrator	2021-09-27 15-22-16-773	Administrator	2021-09-27 15:22:16.773	
	5 ABS		ABS(%1)	ETL Built-In Transformation: Returns the absolute value of a numeric value Arguments: $\%1$ = numeric field	All Projects	Y	Administrator	2021-09-27 15-22-16.773	Administrator	2021-09-27 15:22:16:773	
	6 ADD_TO_DATE		ADD_TO_DATE(%1, format, amount)	ETL Built-In Transformation: Adds a specified amount to one part of a datetime value and returns a date in the same format as the date you pass to the function. Arguments: %1 = date field	All Projects	Y	Administrator	2021-09-27 15:22:16:773	Administrator	2021-09-27 15:22:16:773	
	7 AES_DECRYPT		AES_DECRYPT(%1, key)	ETL Built-In Transformation: Returns decrypted data to string format. The Integration Service uses Advanced Encryption Standard (AES) algorithm with 128-bit encoding. The AES algorithm is a FIPS-approved cryptographic algorithm Arguments. %1 = encrypted text field	All Projects	Ŷ	Administrator	2021-09-27 15.22.16.773	Administrator	2021-09-27 15.22.16.773	
	8 ASCII		ASCII(%1)	ETL, Built-In Transformation. Record handling and processing rule for all projects. When you configure the Integration devices to true in ASCII model, the ASCII function relations the namenic ASCII value of the nist characterist of the string passed to the function. When you configure the Integration Service to run in Uncide mode, the ASCII function returns the runner. Uncided values of the first character of the string passed to the function. Uncide values fail in the rung to 16 ds;353. Symmetris: %1 = last field during fail in the rung to 16 ds;353.	All Projects	Ŷ	Administrator	2021-09-27 15-22-16-773	Administrator	2021-09-27 15:22:16.773	
	9 asdfasdf <img src<="" td=""/> <td>="8"></td> <td></td> <td></td> <td>All Projects</td> <td>N</td> <td>w3tm</td> <td>2022-01-18 10:14:04:543</td> <td>w3tm</td> <td>2022-01-18 10:14:04:543</td> <td></td>	="8">			All Projects	N	w3tm	2022-01-18 10:14:04:543	w3tm	2022-01-18 10:14:04:543	
	10 AVG		AVG(%1 [, filter_condition])	ETL Built in transformation (Aggregation). Returns the average of all values in a group of rows. Optionally, you can apply a filter to limit the rows you read to calculate the average. You can nest only one other aggregate function within AVG, and the nested function must return a Numeric datatype	All Projects	Y	Administrator	2021-09-27 15-22-16.773	Administrator	2021-09-27 15:22:16:773	
	11 CEIL		CEIL(%1)	ETL Built-In Transformation: Record handling and processing rule for all projects. Returns the smallest integer greater than or equal to the numeric value passed to this function: For example, if you pass 3.1 4b CELL, the function returns 4. If you pass 3.98 to CELL, the function returns 4. Likewise, if you pass -3.17 to CELL, the function returns -3.	All Projects	Y	Administrator	2021-09-27 15:22:16:773	Administrator	2021-09-27 15:22:18.773	
blished Mappings	N			ETL Built-In Transformation: Record handling and processing rule for all							



Right-click on Transformations to download an Erwin Defined Transformations template. Select the Transformations and select the desired icon in the upper right of the navigation bar.

DATA INTELLIGENCE SUITE	Mapping Manager			Search			🔨 🔉 🗘 🗌	0 🗉
Workspace Mappings	Transformation Details						\$ €	
Mappings	# Transformation Name	Informatica Pseudocode Intended Use	Scope	Published	Created By	Created Date Time	Last Modified By	Last Modil Date Time
Transformations	plate					1		
A Projects Execute Conn		To_date(mm/dd/yyyy,12/31/9999) DataGovernance rule - use on all projects	All Projects	Υ	Administrator	2020-10-23 11:59:40.36	Administrator	2020-10-23 11:59:40.36
1			Г					
_				ŝ			A 3	
				Q,	+ 、	1		
			L					
	one Eurotie			2	3	4	5	6

Transformations Functionalities:

- 1. **Download Templates** download the Transformations template.
- 2. ETL Configuration select an ETL tool to add to Transformations.
- 3. Add Transformations add new Transformations.
- 4. Export Transformations download Transformations.
- 5. Upload Transformations import Transformations.
- 6. Delete Transformations select and delete their Transformation.

Projects Menu:

Right-click "Projects" to activate Project functionalities

DATA INTELLIGENCE SUITE			Mapping Man	ager
Workspace Mappings	Pi	roject	Summary	
Mappings	#	ŀ	Project Name	Project
 Projects APS Create Project Delete Mapping(s) FPS 			APS	Contains Interface
One View Workflow OPP (164)	2		OPP	
▶ 🔒 UCM Mapping (2)	3		OnePI Mapping	
	4		UCM Mapping	

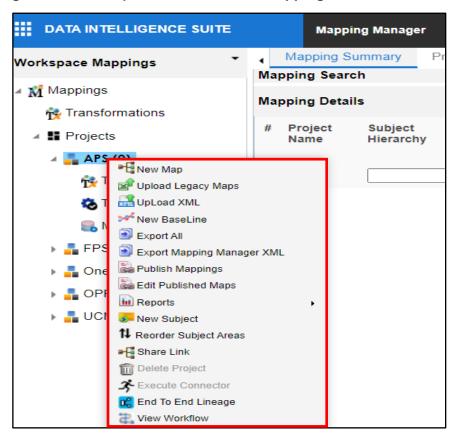
Project Functionalities:

- 1. Delete Mapping delete a manual or auto-map from their environment.
- 2. View Workflow view the workflow.



Mapping Menu

Right-click the Project Name to activate Mapping functionalities

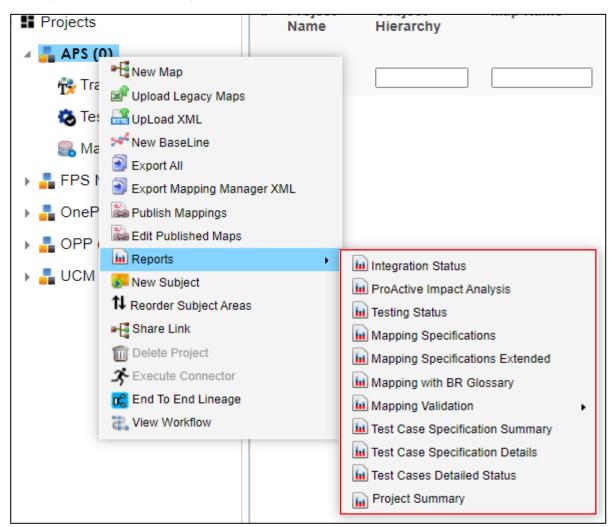


Mappings Functionalities:

- 1. New Map create, delete, and update a mapping.
- 2. Upload Legacy Maps upload a legacy map.
- 3. Upload XML upload a mapping XML file.
- 4. New Baseline create a baseline of metadata mapping from their own mapping project.
- 5. Export All -download mappings as a PDF, JPEG or PNG file.
- 6. Export Mapping Manager XML download mapping manager in XML format.
- 7. Publish Mappings publish single or multiple metadata mappings.
- 8. Edit Published Mappings modify published metadata mappings.



9. Reports - run different types of reports.



- 10. New Subject Area create a new sub-category of their project.
- 11. Reorder Subject Area view of subject area by ascending, descending, or custom order.
- 12. Share Link copy links of mapping projects and share via email.
- **13. End to End Lineage** –view End-to-End lineages.
- 14. View Workflow view the workflow.

The DM/DG Training curriculum provides instructions and best practices for using Mapping Manager functionalities. To download 'Lesson 3: Mapping Manager,' please visit the Training page using the link below:

https://confluenceent.cms.gov/display/DMDG/Training+Materials.



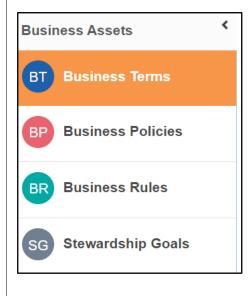
14. Business Glossary Manager

The landing page for the Business Glossary is built and managed by Business Glossary Stewards. It supports the creation, management, and collaboration on common business vocabulary, regulatory compliance, data governance, and data stewardship across CMS-CPI systems. The Business Glossary also facilitates lineage maps that show semantic definitions related to physical data dictionaries, metadata mappings, and data lineages. Other users, such as Data Stewards and Data Reviewers, are only able to view and download information from the Business Glossary Manager.

Business Glossary Dashboard

DATA INTELLIGENCE SUITE	Business Glossary Manager				A 0 🖬 🖯
Business Assets <	Catalog View				
BT Business Terms	Workspace ¢	3 5	0 Summary Pa	ine	
BP Business Policies	My Governed Assets Business Terms	Catalogs (All Sub Catalogs) Business Terms	Published Terms		
		BUSINESS TERMS SUMMARY			▲ EXPORT EXCEL
BR Business Rules	Training_Bus_Terms (4)		LMNOPQRSTUVWXYZ		
SG Stewardship Goals		Compact View Grid View What are you looking for		Items Per	Page 50 - Page 1 PREVIOUS NEXT
		what the you looking for			
		Training_Bu_ → Training_B _{**} →			
		B BENE Beneficiary		Draft 12	P :-
		Training_Bu → Training_B → NPI Netword Resider Identifier		Draft 22	🔮 🗄 -
		National Provider Identifier			
			Detail Viev	N	
		APS_Bus_Ter.			
		N NPI National Provider Identifier		Draft 0	P :-
		Training_Bu., → Training_B., →			
		D PRVDR		Draft 9	🔮 🗄 -
		Provider			
		Training_Bu → Training_B →		-	Q .
		S SSN Social Security Number		Draft 3	P :-

Business Glossary Menu



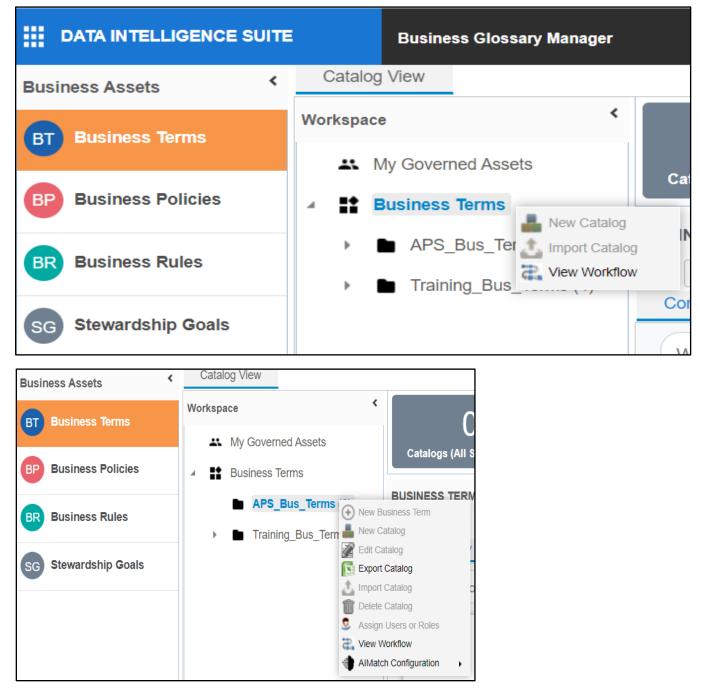
• **Business Terms** – globally define and maintain terms that represent your business terminology, common business vocabulary across CMS-CPI systems.

• **Business Policies** – globally define and maintain a set of business policies and standards across CMS-CPI systems.

• **Business Rules** – this module can be used for globally defined set of business rules and protocols that can be followed throughout DISM/DASG systems.

• **Stewardship Goals** – Data Stewards can initiate and facilitate collaboration.

Business Terms Menu and Functionalities

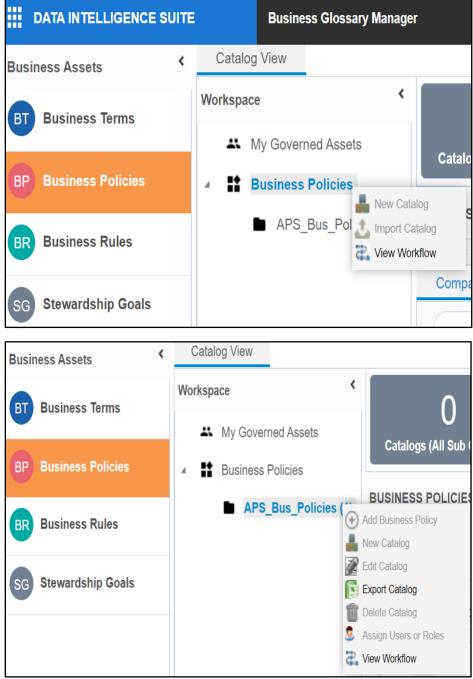


Business Terms Functionalities:

- 1. View Workflow this function allows the users to view the workflow.
- 2. Export Catalog this function allows the users to download Business Catalog in Excel format.
- 3. AlMatch Configuration this function allows the users to automatically discover and suggest the best possible associations between business terms and physical metadata (tables/columns).



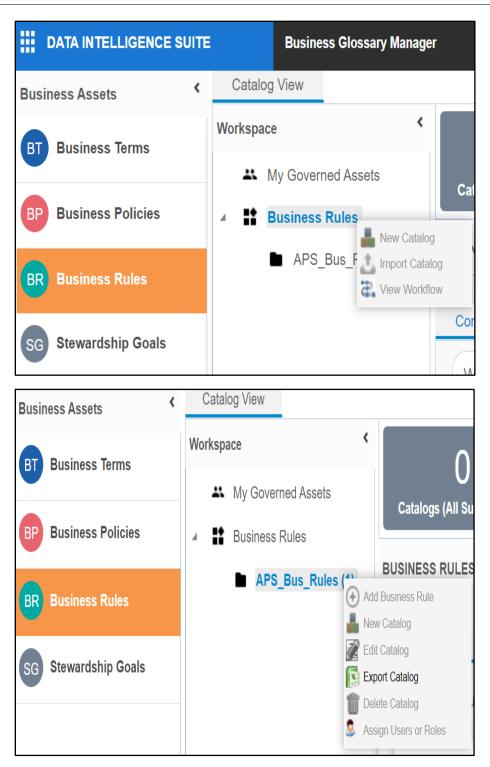
Business Policies Menu and Functionalities



Business Policies Functionalities:

- 1. View Workflow this function allows the users to view the workflow.
- 2. Export Catalog this function allows the users to download Business Catalog in Excel format.

Business Rules Menu and Functionalities



Business Rules Functionalities:

• Export Catalog – this function allows the users to download Business Catalog in Excel format.



15. Erwin Business User Portal

Business User Portal (BUP) is a Read-only (RO) access to Metadata Manager, Mapping Manager, Projects, Codeset Manager, and Business Glossary Manager.

The left pane is the main menu for Erwin BUP. The right pane displays the same information in card format.

😑 DI Business User P	ortal		© 0						
A Home									
E Deshboard	Welcome, <mark>Your Username</mark>								
🗎 My To-Do List									
🖽 Metadata 🛩		erwin DI Business User Portal is a self-service, read-only portal targeted at business users. It provides you with an easy way to access data governance and management information stored in erwin Data Intelligence Suite.							
•									
Business Terms		DOCUMENTATION 🗵 FEEDBACK 🗵							
Business Rules									
		14/1							
		What we offer							
	22	12 A	E						
	Dashboard	My To-Do List	Systems						
	Get a glimpse into the different areas of the portal and navigate directly to the ones that mean the most to you.	Create and manage day to day tasks related to the governance of both your Metadata Catalog and Business Glossary	Browse the systems that are part of the Metadata Catalog						
Left			-						
Pane	Environments	Tables	Columns						
	Browse the environments that are part of the Metadata Catalog	Browse the tables that are part of the Metadata Catalog.	Browne the columns that are part of the Metadata Catalog.						
	-8	1	0						
	Mappings	Business Terms	Business Policies						
	Understand and track the movement, integration, and transformation of your company's data.	Understand the common words and phrases that are used as part your company's day to day operations.	Keep up to date with the principles set by your company.						
	-								
		Right Dana							
	Business Rules	Right Pane							
	Practice and adhere to the standards/protocols set by your company.	U							

Every Erwin BUP module page will have the same layout of the top navigation bar.

	0 8
1	23
1. Main Menu: Expands/collapses the Left Pane.	

- **2. Help/Feedback/About:** Click this icon to leave enter the Erwin User Guide, Erwin User Community, and Erwin Product Information.
- **3. Account/Logout:** Click this icon to display your account information and the log out option.



=	DI Business	User Po	rtal		ō 0								
÷	Home												
5	Dashboard												
⊞	Metadata	^	Welcome, <mark>Your Username</mark>										
≡	Systems			erwin DI Business User Portal is a self-service, read-only portal targeted at business users. It provides you with an									
8	Environments		easy way to	o access data governance and management information stored in erwin Data Intel	ligence Suite.								
⊞	Tables			DOCUMENTATION 🖄 FEEDBACK 🔀									
B	Columns												
-8	Mappings												
10	Business Terms			What we offer									
æ	Business Policie												
Ċ	Business Rules		_	-	-								
==	Custom Assets	Ň											
e	Reference Data		Dashboard	Systems	Environments								
			Get a glimpse into the different areas of the portal and navigate directly to the ones that mean the most to you.	Browse the systems that are part of the Metadata Catalog.	Browse the environments that are part of the Metadata Catalog.								
				8	H								
			Tables	Columns	Mappings								
			Browse the tables that are pay of the Metadata Catalog.	Browse the columns that are part of the Metadata Catalog.	Understand and track the movement, integration, and transformation of your company's data.								
				0	0								
			Business Terris	Business Policies	Business Rules								
			Understand the common words and phrases that are used as part your company's day to day operations.	Keep up to date with the principles set by your company.	Practice and adhere to the standards/protocols set by your company.								
				B									
			Custom Assets	Reference Data									
			Fer size yourself with the additional assets that supplement your company's terms, policies, and rules.	Peruse the codesets (valid values), code crosswalks, and other data that are permissible to be used with other fields.									
L		-											

There are two ways to navigate the Dashboard. Click on the card named "Dashboard" from the center of the page or from the left-pane main menu.

The dashboard displays a snapshot of the Erwin DI data catalogs and modules.

Each card is click-able and displays a collection of information that provide a snapshot of the underlying metadata. The catagories inside each card are also click-able.

=	DI Business User Po	rtal							
ŧ.	Home	Dashboard							
	Dashboard								
≣	My To-Do List	Metadata		Projects		Mappings		Glossary of Terms	
⊞	Metadata 🔨			Ê			-f		
	Systems					1.079.15	4		
0))	Environments	SENSITIVE DATA SYSTEMS	7 30 99	PROJECTS SUBJECT AREAS	15 32	ACTIVE PUBLISHED	499	CATALOGS TERMS	9
⊞	Tables	ENVIRONMENTS TABLES	99 1921						
₿	Columns	COLUMNS	37935						
ſ	Mappings								
	Business Terms	Business Policies		Business Rules					
E	Business Policies								
Ē	Business Rules			1 = 2 =					
	Custom Assets 🗸 🗸	CATALOGS	3	CATALOGS	3			l	
		POLICIES	0	RULES	3		Card	C	
N	/lenu						Caru	3	

*All functionalities can be accessed from the main menu or the card format.



From the Dashboard the user can view the following:

- 1. My To-Do List displays a task list.
- 2. Metadata displays the number of technical assets that are classified as sensitive, and number of systems, environments, tables, and columns.
- 3. Projects displays the number of projects and subject areas.
- 4. Mappings displays the number of active and published mappings.
- 5. Codes and Crosswalks displays the number of codesets, code values, and code crosswalks.
- 6. Glossary of Terms displays the number of business term catalogs and business terms.
- 7. Business Policies displays the number of business term catalogs and business terms.
- 8. Business Rules displays the number of business rule catalogs and business rule



DM/DG ServiceNow Help Desk

- DM/DG ServiceNow Help Desk
 https://cmsitsm.servicenowservices.com/connect
- Request an EFI EUA Job Code
 https://eua.cms.gov/iam/im/pri/
- Erwin Bookshelf Resources
 https://bookshelf.erwin.com/bookshelf



Appendix: Record of Changes

RECORD OF CHANGES TABLE

Version Number	Date	Author/Owner	Description of Change
V1.0	7/2021	RELI Group, Inc	First Draft
V1.2	7/2022	RELI Group, Inc	Updated
V1.3	9/2022	RELI Group, Inc	Updated



Appendix: List of Acronyms

