



Centers for Medicare & Medicaid Services

# Erwin Data Intelligence Suite 10.2

## Quick Start User Navigation Guide



# Table of Contents

- 1. About this guide ..... 3
- 2. DM/DG user roles ..... 4
- 3. How to login ..... 5
- 4. Login errors..... 6
- 5. Erwin DI landing page..... 7
- 6. Erwin DI results window ..... 8
- 7. Erwin DI Catalogs ..... 9
- 8. Data Catalog ..... 10
- 9. Data Literacy ..... 11
- 10. Miscellaneous..... 12
- 11. Data Catalog – System-level functionalities ..... 13
- 12. Metadata Manager – Environment, Table, Column functionalities ..... 14
- 13. Metadata Manager – Mapping Manager..... 15
- 14. Business Glossary Manager ..... 19
- 15. Erwin Business User Portal ..... 23
- DM/DG ServiceNow Help Desk ..... 26
- Appendix: Record of Changes ..... 27
- Appendix: List of Acronyms ..... 28

# 1. About this guide

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This user navigation guide provides CMS-CPI Application Data Stewards and Business Analysts with quick-start 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:

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

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

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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 [REDACTED]
- DMDG [REDACTED]
- DMDG [REDACTED]

### Validation:

- DMDG [REDACTED]
- DMDG [REDACTED]
- DMDG [REDACTED]

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.

The image shows a split-screen view of a login interface. On the left, a dark blue warning banner with white text provides legal notices for the 'Centers for Medicare and Medicaid - CPI Data Management Data Governance (DMDG)'. On the right, the 'erwin Data Intelligence' login page is displayed, featuring a 'User Name' field, a 'Password' field, and a checkbox for 'I accept & agree to the terms of the EULA'. A red arrow points to this checkbox. Below the login form is a 'SIGN IN' button and a link for 'Can't access your account?'. At the bottom, it says 'Licensed To: CUST10432 CMS Sandbox'.

**Centers for Medicare and Medicaid - CPI Data Management Data Governance (DMDG)**

- \* 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.
- \* This system is provided for Government authorized use only.
- \* 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 duties and is subject to monitoring.
- \* By using this system, you understand and consent to the following:
  - 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.
  - Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose

You may reach the DMDG team at: [dmdg-support@cms.hhs.gov](mailto:dmdg-support@cms.hhs.gov) (Validation Environment)

**CMS.gov**  
Centers for Medicare & Medicaid Services

**erwin**  
the data governance company

**Data Intelligence**

User Name  
[input field]

Password  
[input field]

I accept & agree to the terms of the EULA

**SIGN IN**

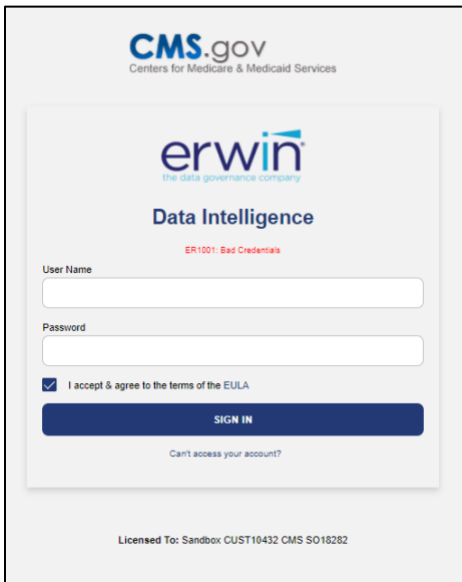
Can't access your account?

Licensed To: CUST10432 CMS Sandbox

## 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 -[support@cms.hhs.gov](mailto:support@cms.hhs.gov).



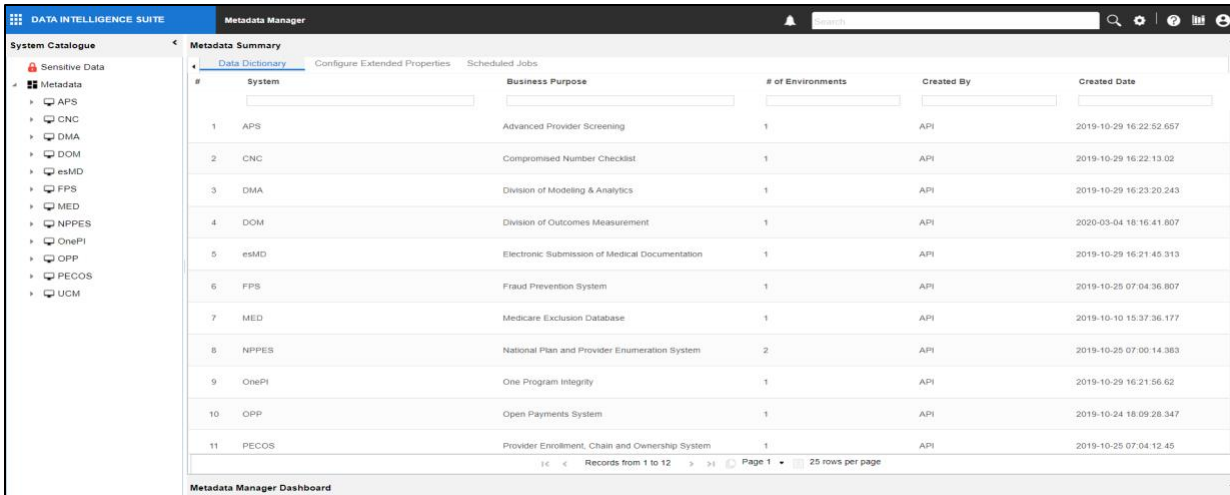
The screenshot shows the login interface for Erwin Data Intelligence. At the top, it displays the CMS.gov logo and the text 'Centers for Medicare & Medicaid Services'. Below this is the Erwin logo with the tagline 'the data governance company' and the text 'Data Intelligence'. A red error message 'ER1001: Bad Credentials' is displayed above the login fields. The fields include 'User Name' and 'Password', both with input boxes. Below the password field is a checkbox labeled 'I accept & agree to the terms of the EULA', which is checked. A blue 'SIGN IN' button is positioned below the checkbox. At the bottom of the form, there is a link that says 'Can't access your account?'. The footer of the page reads 'Licensed To: Sandbox CUST10432 CMS SO18282'.

For more information about login errors, see “Login Issues” at the link below:

<https://confluenceent.cms.gov/display/DMDG/DMDG+Login+Issues>

## 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.



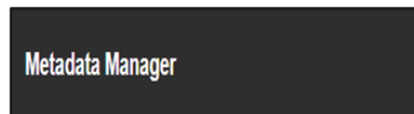
The screenshot shows the 'Metadata Manager' interface with a table of system metadata. The table has columns for '#', 'System', 'Business Purpose', '# of Environments', 'Created By', and 'Created Date'. The data is as follows:

#	System	Business Purpose	# of Environments	Created By	Created Date
1	APS	Advanced Provider Screening	1	API	2019-10-29 16:22:52.657
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
4	DOM	Division of Outcomes Measurement	1	API	2020-03-04 16:16:41.607
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 07:00:14.363
9	OnePI	One Program Integrity	1	API	2019-10-29 16:21:56.62
10	OPP	Open Payments System	1	API	2019-10-24 16:09:28.347
11	PECOS	Provider Enrollment, Chain and Ownership System	1	API	2019-10-25 07:04:12.45

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 Miscellaneous modules within the application.



The Erwin DI Unified Application Menu.



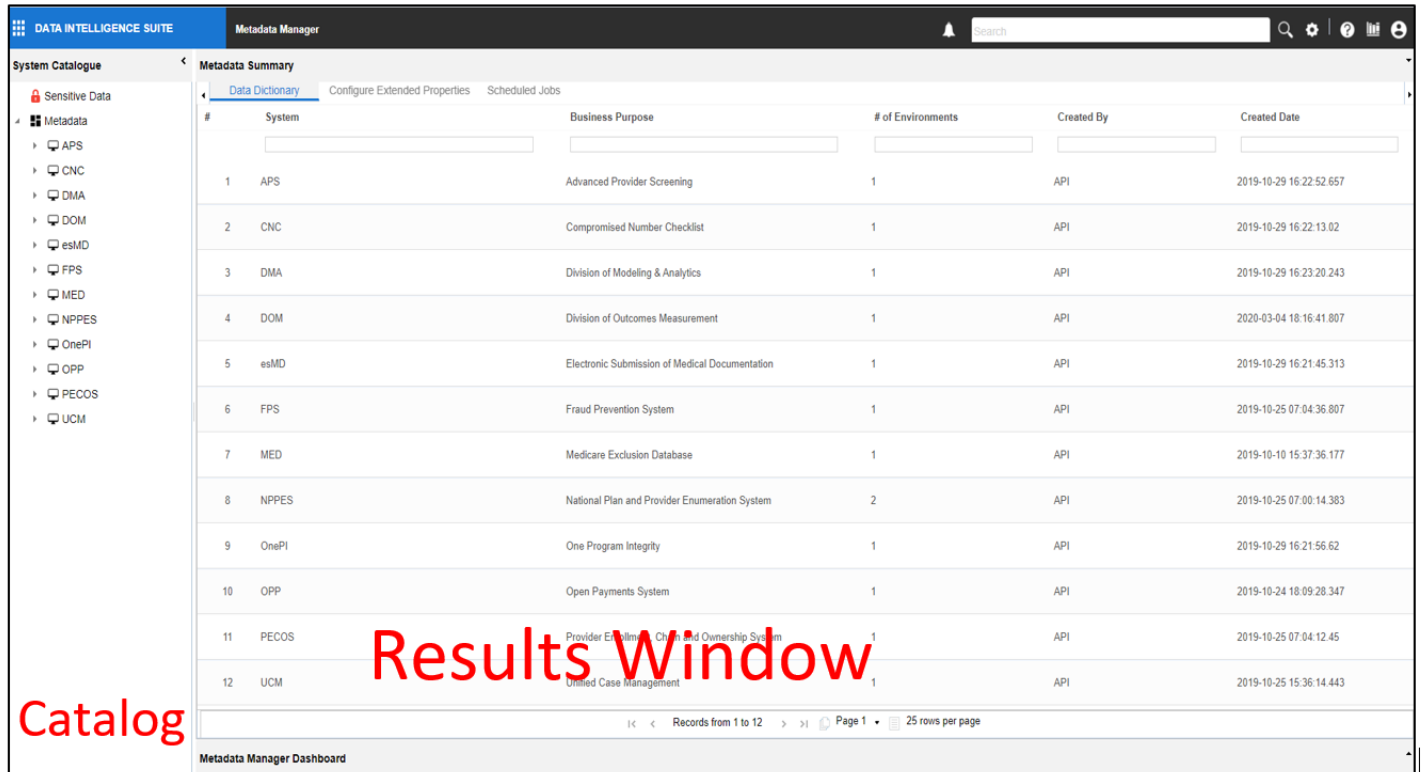
Erwin DI Module Title page.

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.



The screenshot displays the Erwin DI Metadata Manager interface. On the left is the 'System Catalogue' pane with a tree view of metadata systems. The main area is the 'Metadata Summary' table, which lists 12 records. A large red watermark 'Results Window' is overlaid on the table. The table has columns for '#', 'System', 'Business Purpose', '# of Environments', 'Created By', and 'Created Date'. Below the table is a pagination bar showing 'Records from 1 to 12', 'Page 1', and '25 rows per page'. The bottom of the interface shows 'Metadata Manager Dashboard'.

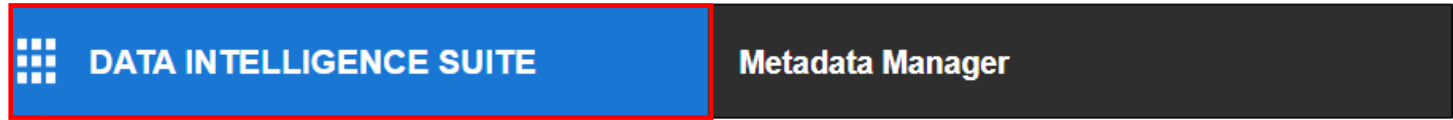
#	System	Business Purpose	# of Environments	Created By	Created Date
1	APS	Advanced Provider Screening	1	API	2019-10-29 16:22:52.657
2	CNC	Compromised Number Checklist	1	API	2019-10-29 16:22:13.02
3	DMA	Division of Modeling & Analytics	1	API	2019-10-29 16:23:20.243
4	DOM	Division of Outcomes Measurement	1	API	2020-03-04 18:16:41.807
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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	Provider Enrollment, Chain, and Ownership System	1	API	2019-10-25 07:04:12.45
12	UCM	Unified Case Management	1	API	2019-10-25 15:36:14.443



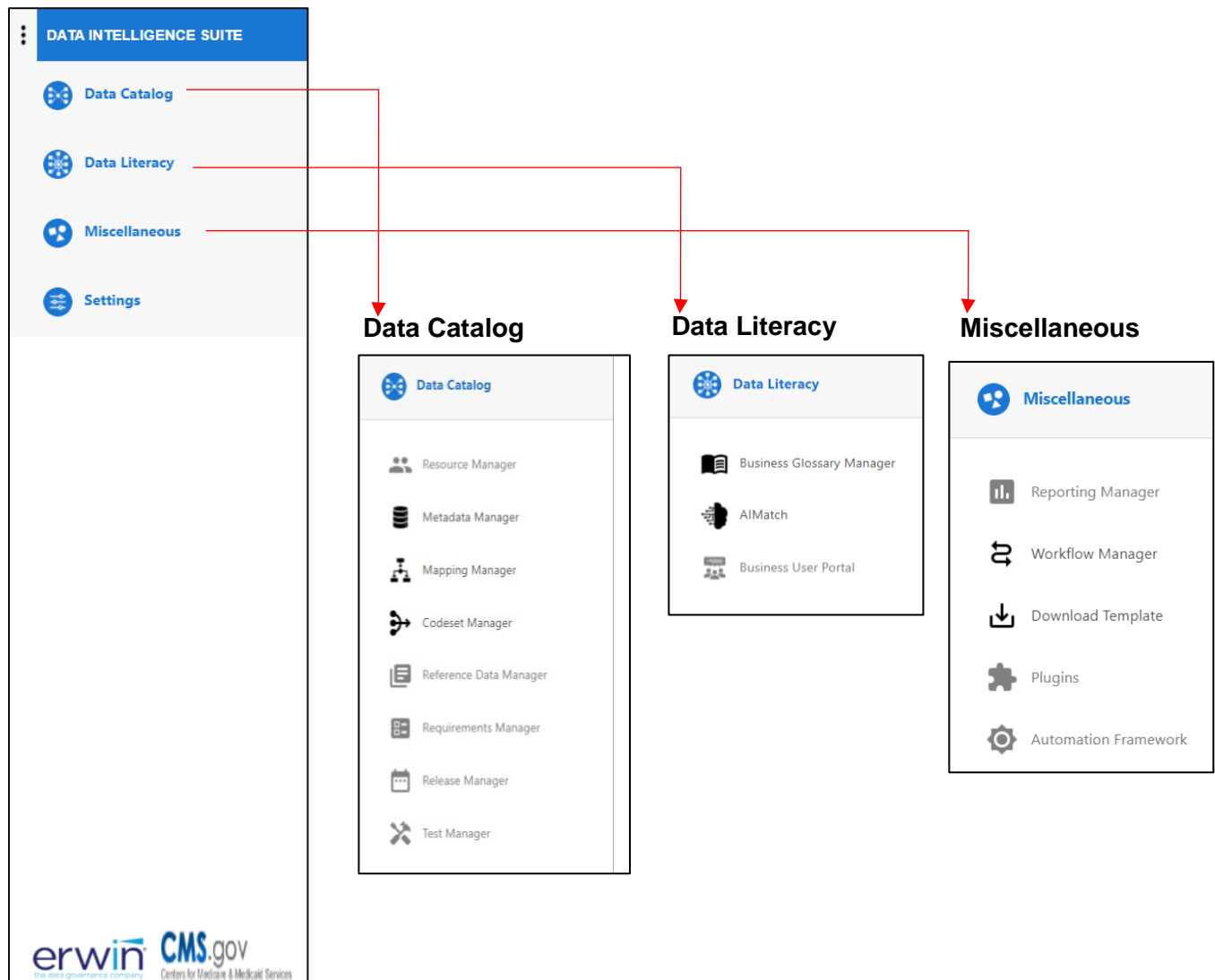
# 7. Erwin DI Catalogs

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.

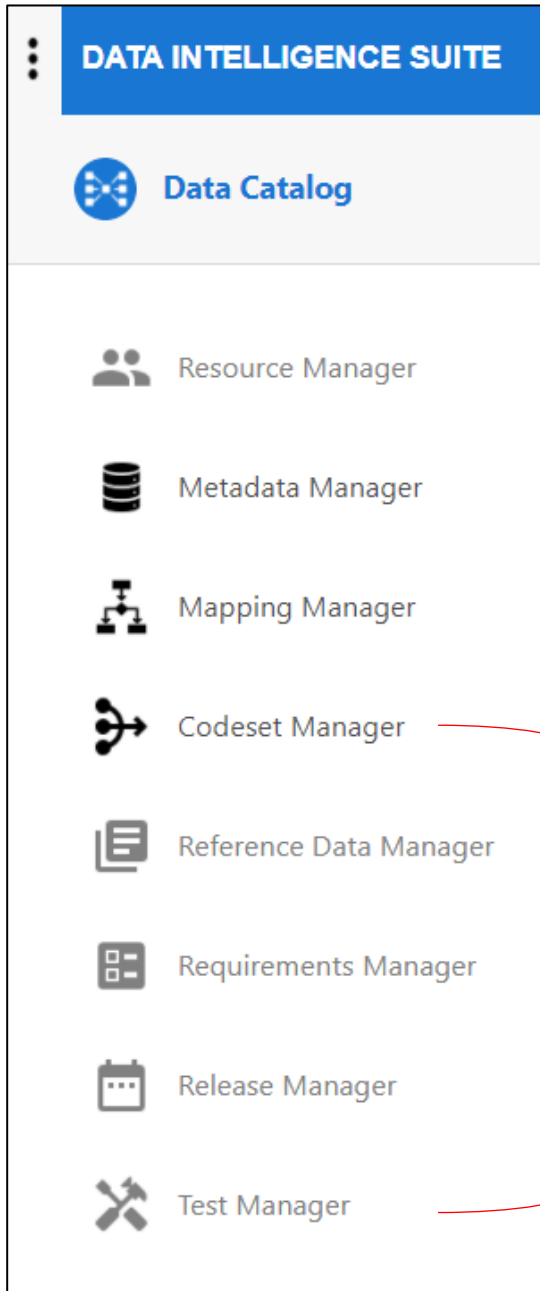


Hover over the icon to activate the sub-menu options. Selecting the desired component, such as Data Catalog, Data Literacy, or Miscellaneous, will activate the functionalities within.



## 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.



← Disabled

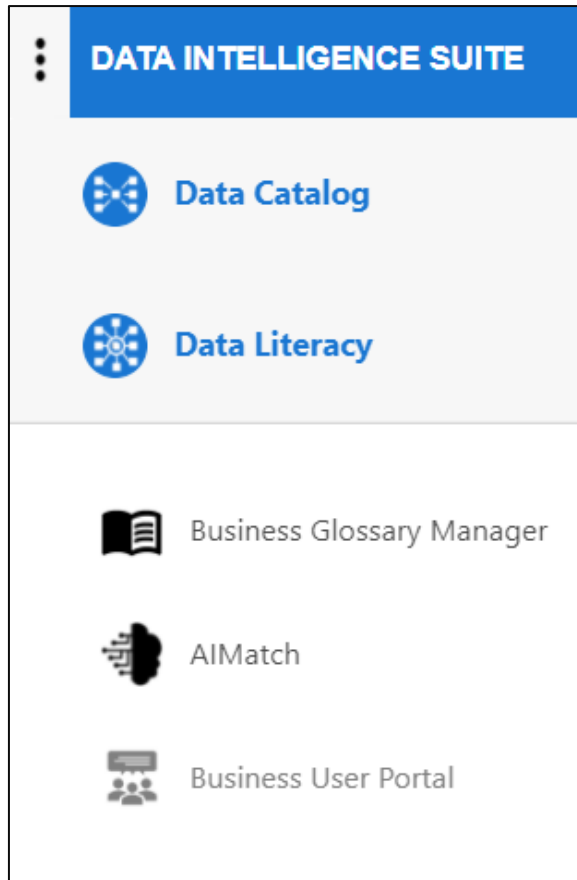
**Metadata Manager** – harvest metadata from a data source, augment and tag metadata, and prepare it for mapping.

**Mapping Manager** – create automated and manual mappings and perform a data lineage.

← Disabled for Phases 1, 2

## 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.



**Business Glossary Manager** – Contains data dictionaries that make the relationship between semantic definitions and physical data dictionaries, mappings, and lineages easier to understand.

← Disabled Phase 1, 2

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:

<https://confluenceent.cms.gov/display/DMDG/Standardized+CMS+Business+Terms+and+Policies>

## 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.

The screenshot shows a vertical navigation menu for the 'DATA INTELLIGENCE SUITE'. The menu items are:

- Data Catalog** (Active)
- Data Literacy** (Active)
- Miscellaneous** (Active)
- Reporting Manager** (Disabled)
- Workflow Manager** (Disabled)
- Download Template** (Active, highlighted with a red border)
- Plugins** (Disabled)
- Automation Framework** (Disabled)

Grey arrows pointing left from the text 'Disabled' are positioned to the right of the Reporting Manager, Workflow Manager, Plugins, and Automation Framework items.

# 11. Data Catalog – System-level functionalities

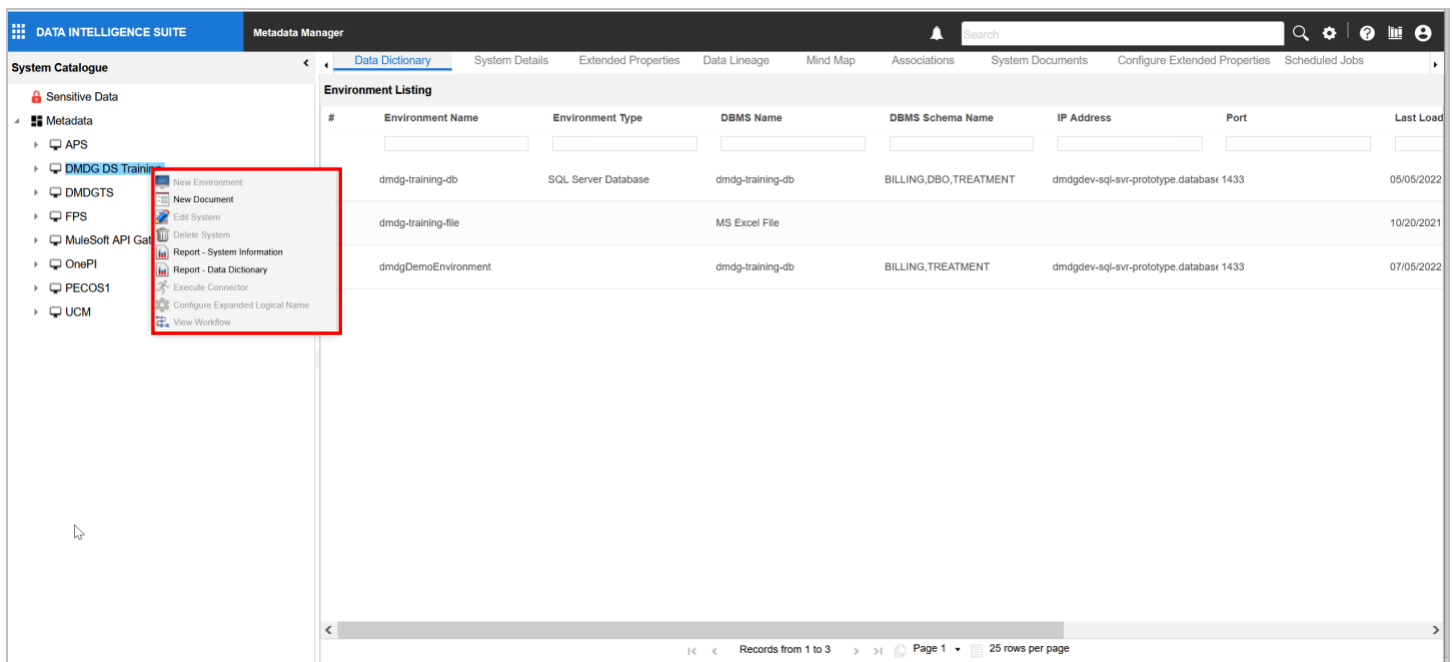
Erwin DI is organized into a System Hierarchy, beginning with the Application Data Steward’s own application system. Functionalities can be accessed at the System, Environment, Table, or Column level. Download the training documentation for 'Lesson 1 Metadata Manager System-level' using the link provided below:

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

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.



## 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.

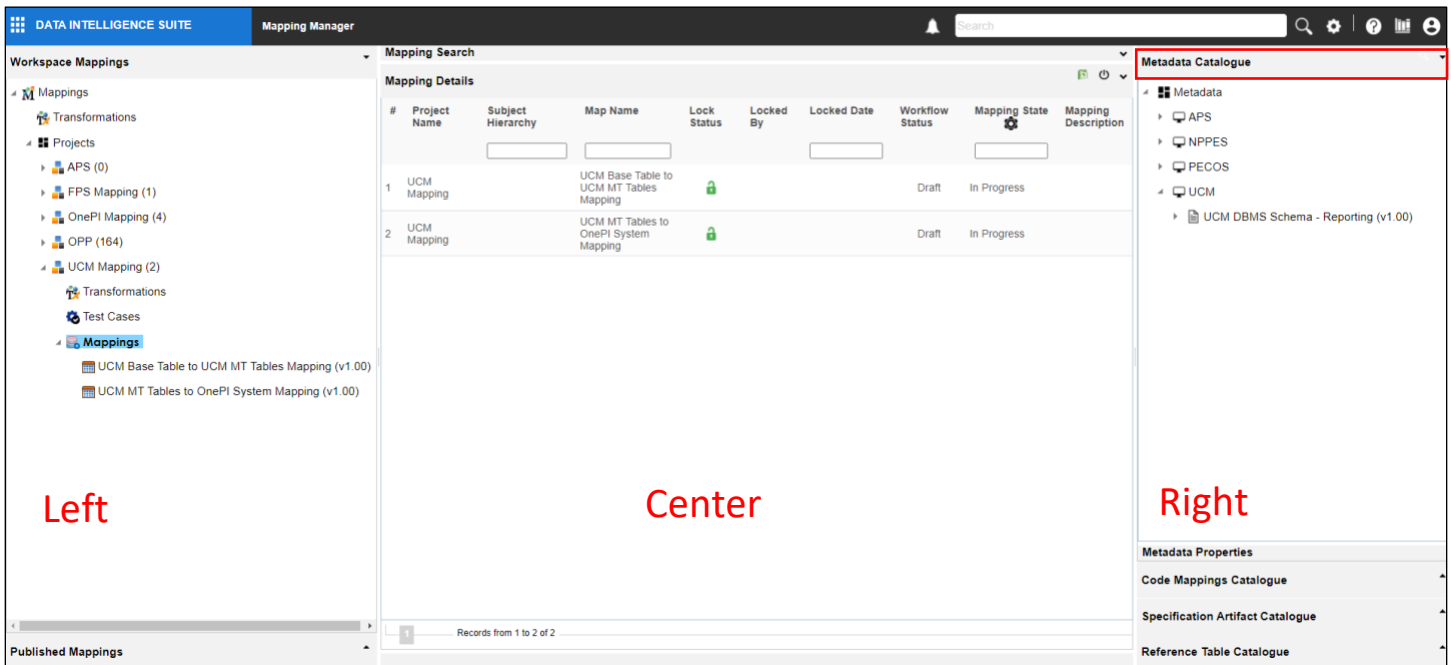
The screenshot displays the Metadata Manager interface. On the left, the System Catalogue shows a tree view with folders for Sensitive Data, Metadata, and various environments. The main area shows a Statistics dashboard with several metrics (Total Tables, Tables With Expanded Logical Names, Total Columns, Columns With Expanded Logical Names, Total Primary Key Columns, Total Foreign Key Columns, and DQ Score) and a tab menu with options like Data Dictionary, Environment Details, Extended Properties, Data Lineage, Impact as Source, Impact as Target, Mind Map, Associations, Workflow Log, Documents, and Data. A dropdown menu is open over the Data Dictionary tab, listing actions such as Scan Metadata, Schedule Metadata Scan, Validate Data, Import Environment, Export Environment, New Version, Add Table, Data Dictionary, View Options, Edit Environment, Clone Environment, Delete Environment, Generate DDL, New Document, Advanced Business Properties, Hide Environment, Execute Connector, Delete Table(s), ER Diagram, Configure Expanded Logical Name, View Workflow, and Assign Users or Roles.

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:

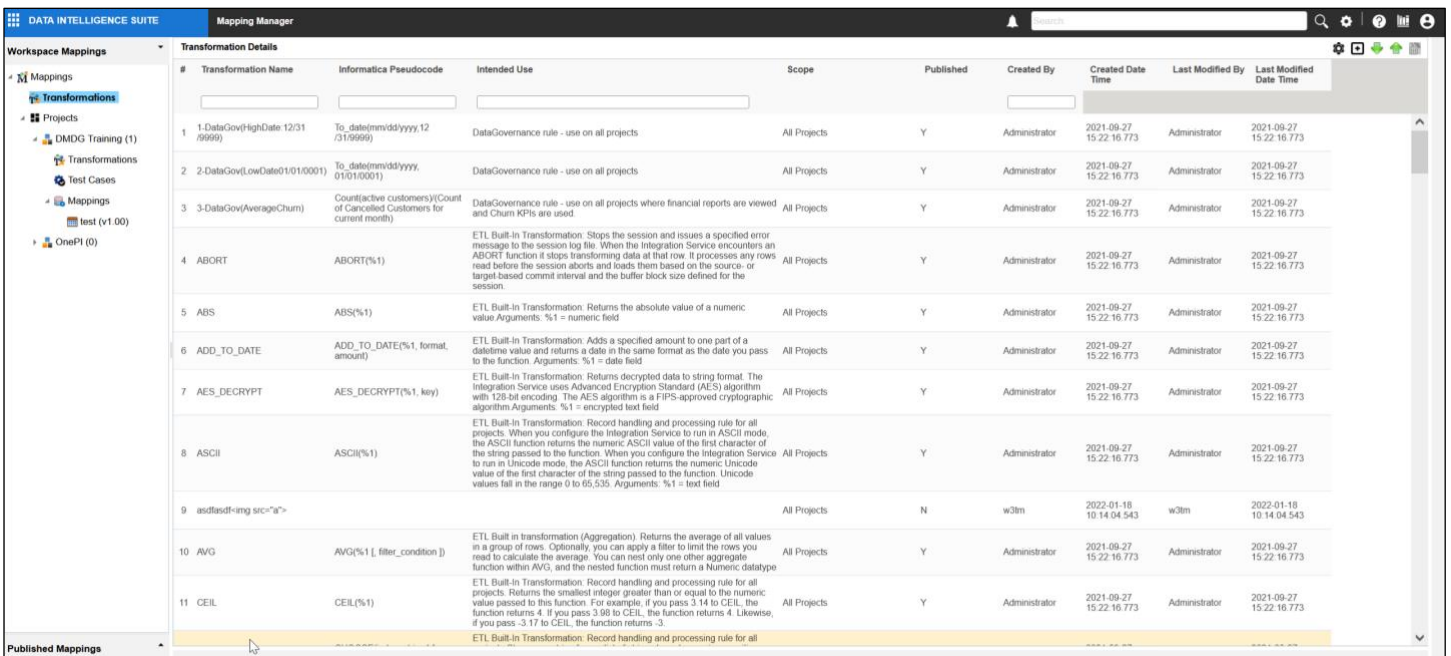
<https://confluenceent.cms.gov/display/DMDG/Training+Materials>.

# 13. Metadata Manager – Mapping Manager

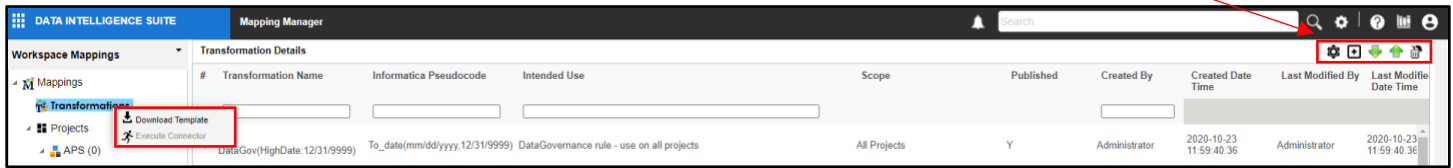
Application Data Stewards create Mapping Specifications for Source to Target metadata in Mapping Manager. Within Mapping Manager, the left windowpane displays the list of Mappings and Projects for the Data Stewards' own application system. The center windowpane shows Mapping Details, and the right windowpane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



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.



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.



1



2

3

4

5

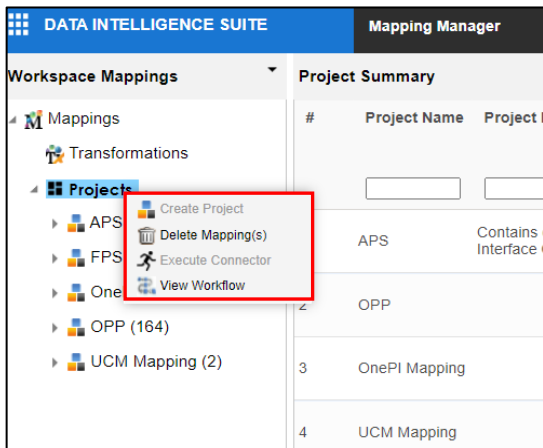
6

### 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



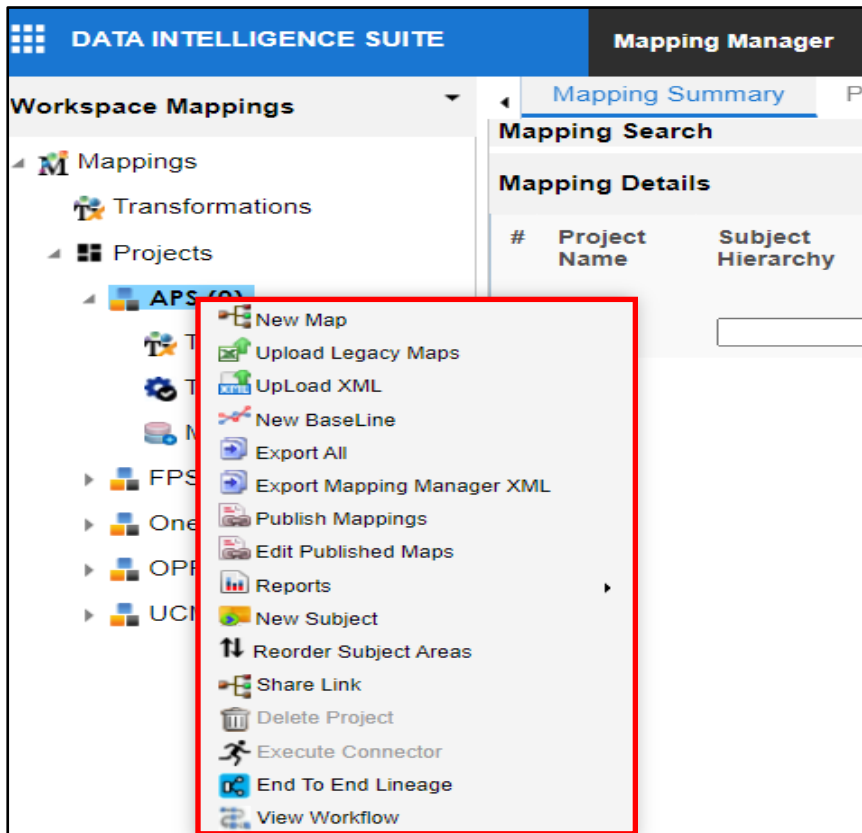
### Project Functionalities:

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



## Mapping Menu

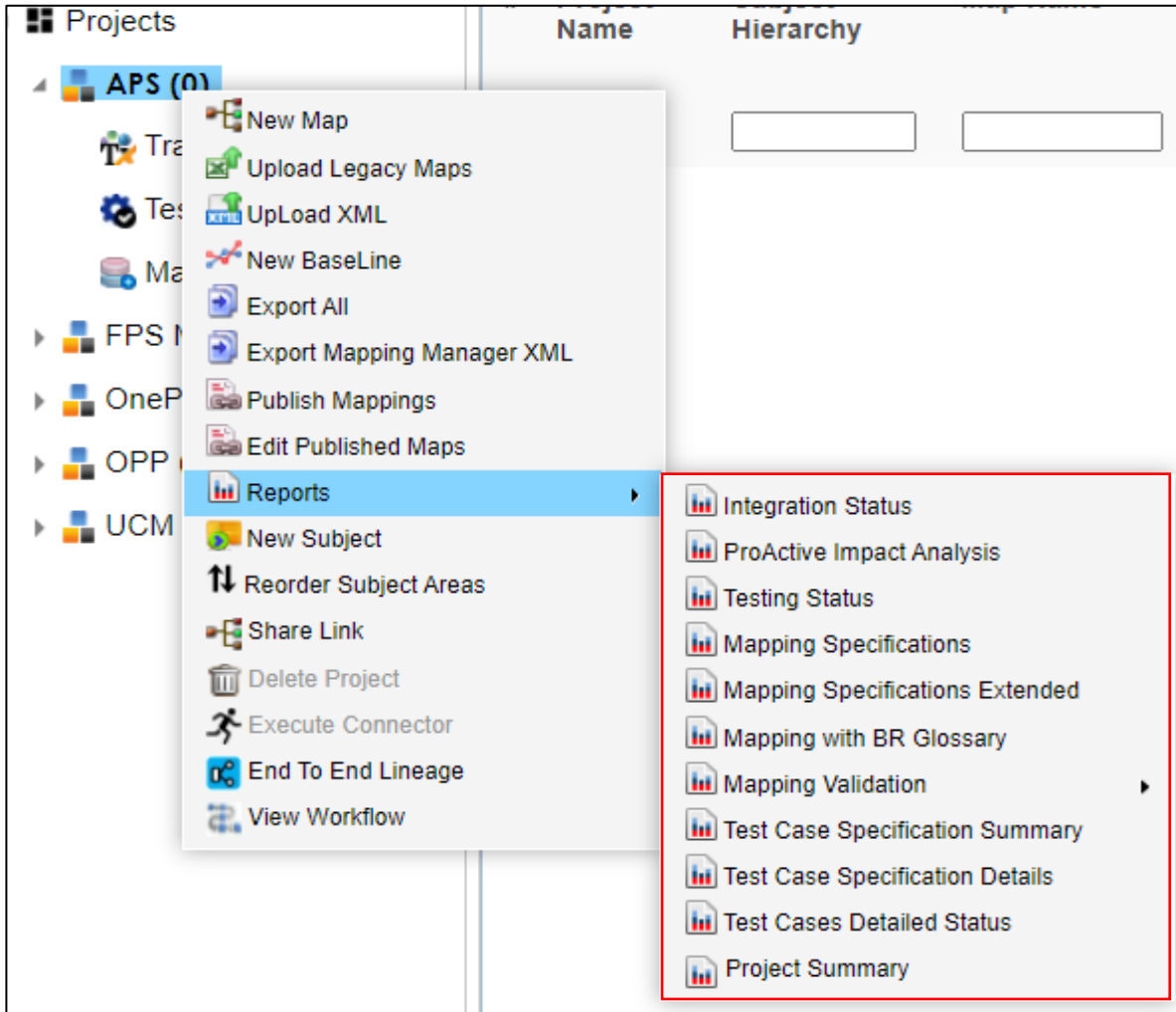
Right-click the Project Name to activate **Mapping** functionalities



### 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

The screenshot shows the Business Glossary Manager interface. At the top, there are three summary cards: 'Catalogs (All Sub Catalogs)' with a count of 3, 'Business Terms' with a count of 5, and 'Published Terms' with a count of 0. A red box highlights the 'Summary Pane' area, which includes a 'BUSINESS TERMS SUMMARY' section with a search bar and a grid view. Below this, a 'Detail View' is shown, listing terms with their status (Draft), counts, and icons. The terms listed are: 'BENE Beneficiary' (12), 'NPI National Provider Identifier' (22), 'NPI National Provider Identifier' (0), 'PRVDR Provider' (9), and 'SSN Social Security Number' (3).

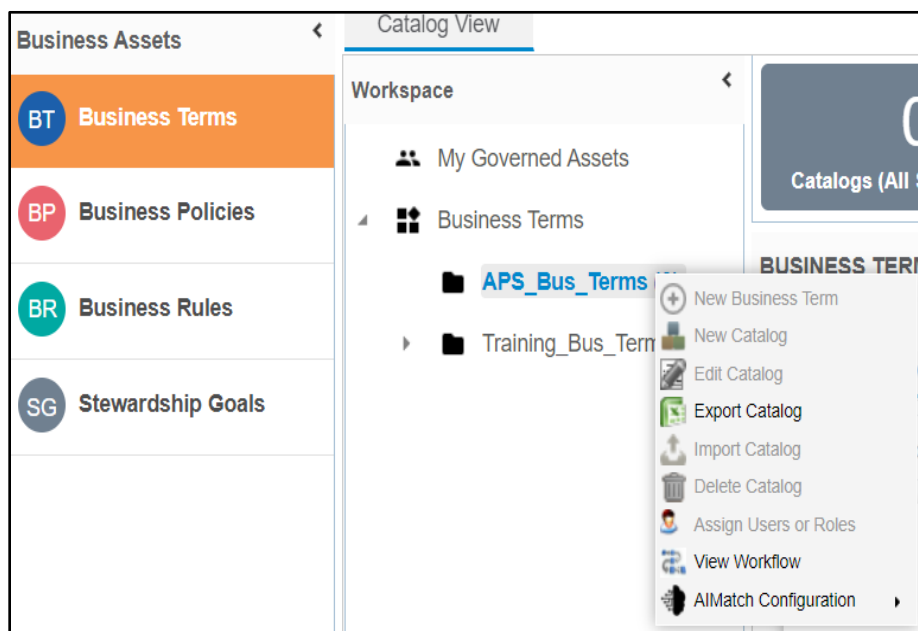
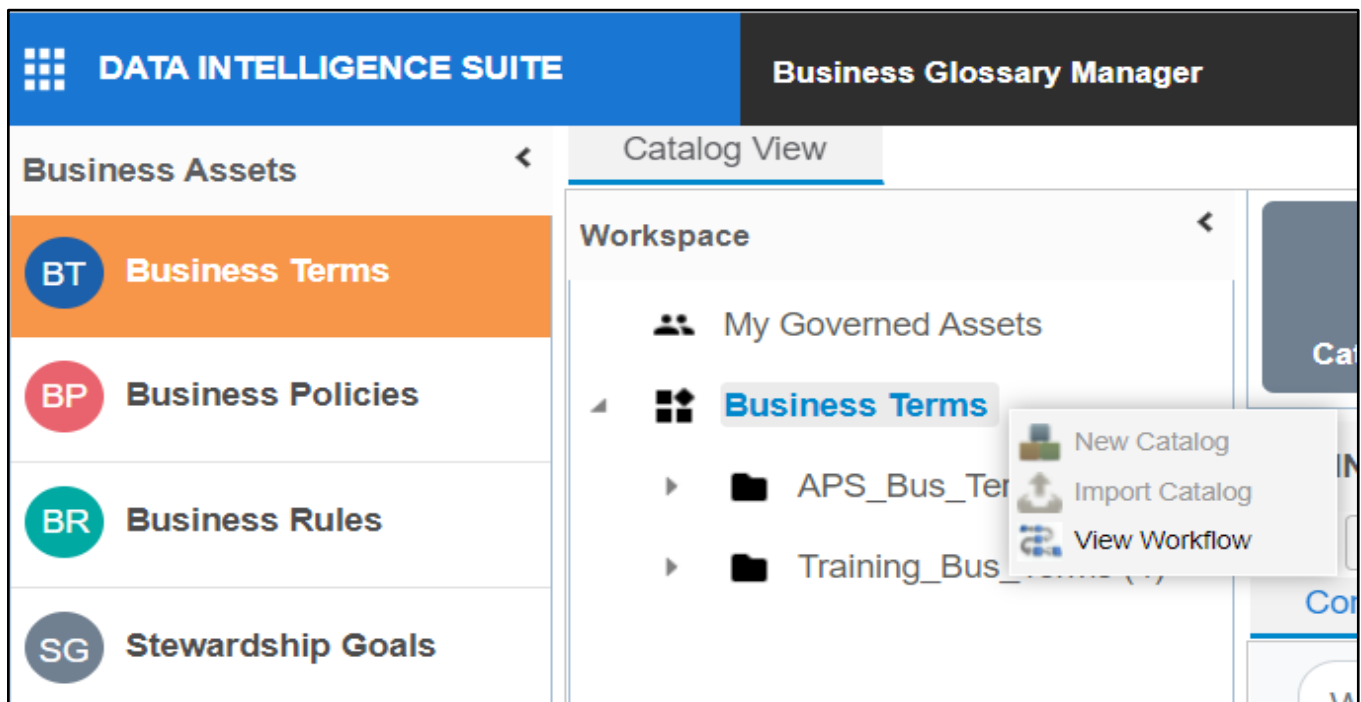
## Business Glossary Menu

The Business Glossary Menu is a vertical list of four items under the heading 'Business Assets':

- BT Business Terms** (highlighted in orange)
- BP Business Policies** (in pink)
- BR Business Rules** (in teal)
- SG Stewardship Goals** (in grey)

- **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.

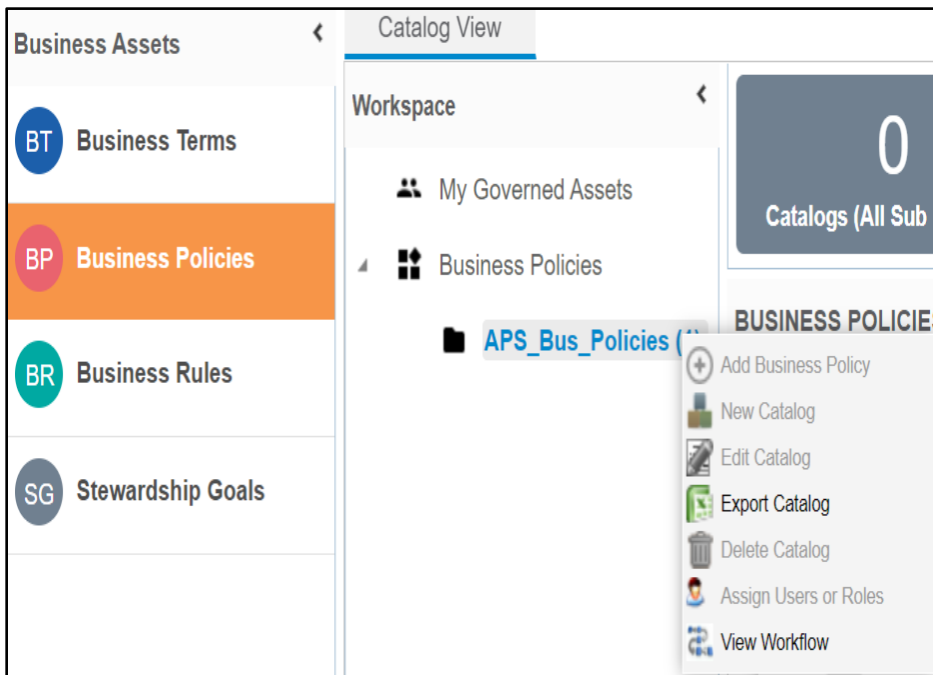
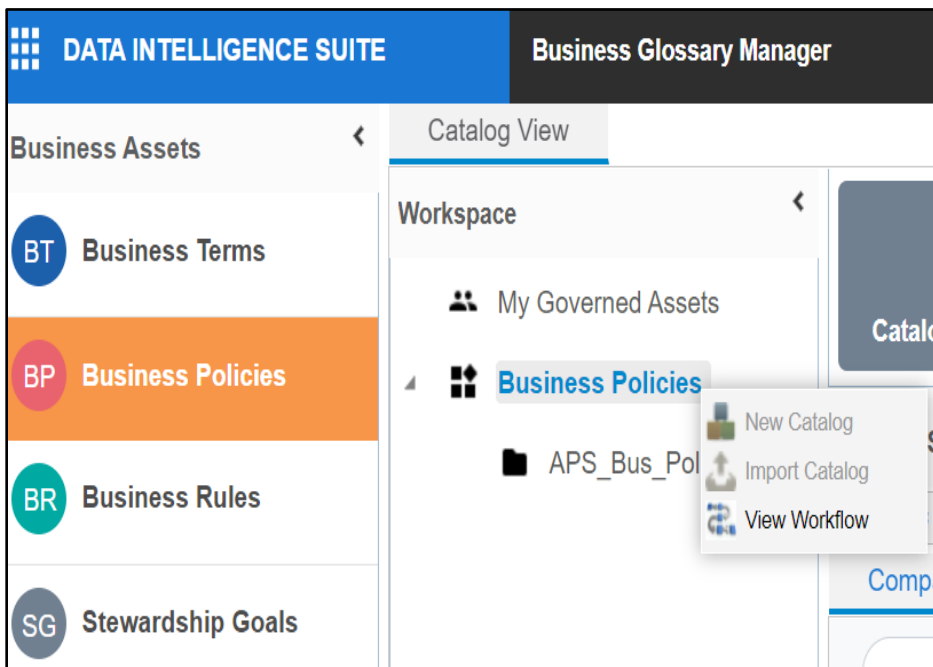
## Business Terms Menu and Functionalities



### 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. **AllMatch Configuration** – this function allows the users to automatically discover and suggest the best possible associations between business terms and physical metadata (tables/columns).

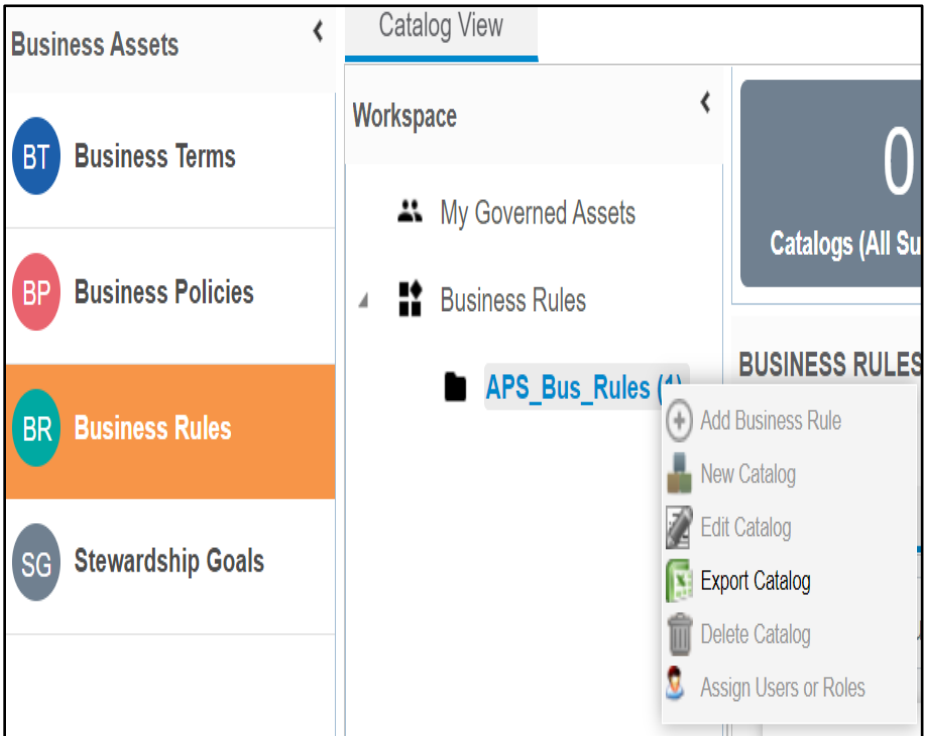
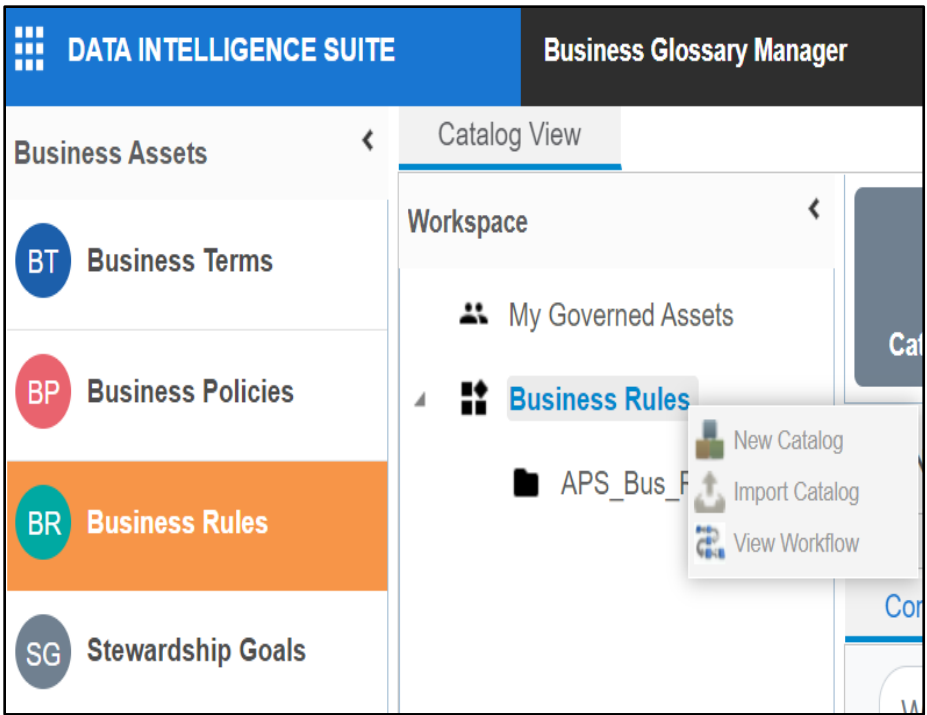
## Business Policies Menu and Functionalities



### 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



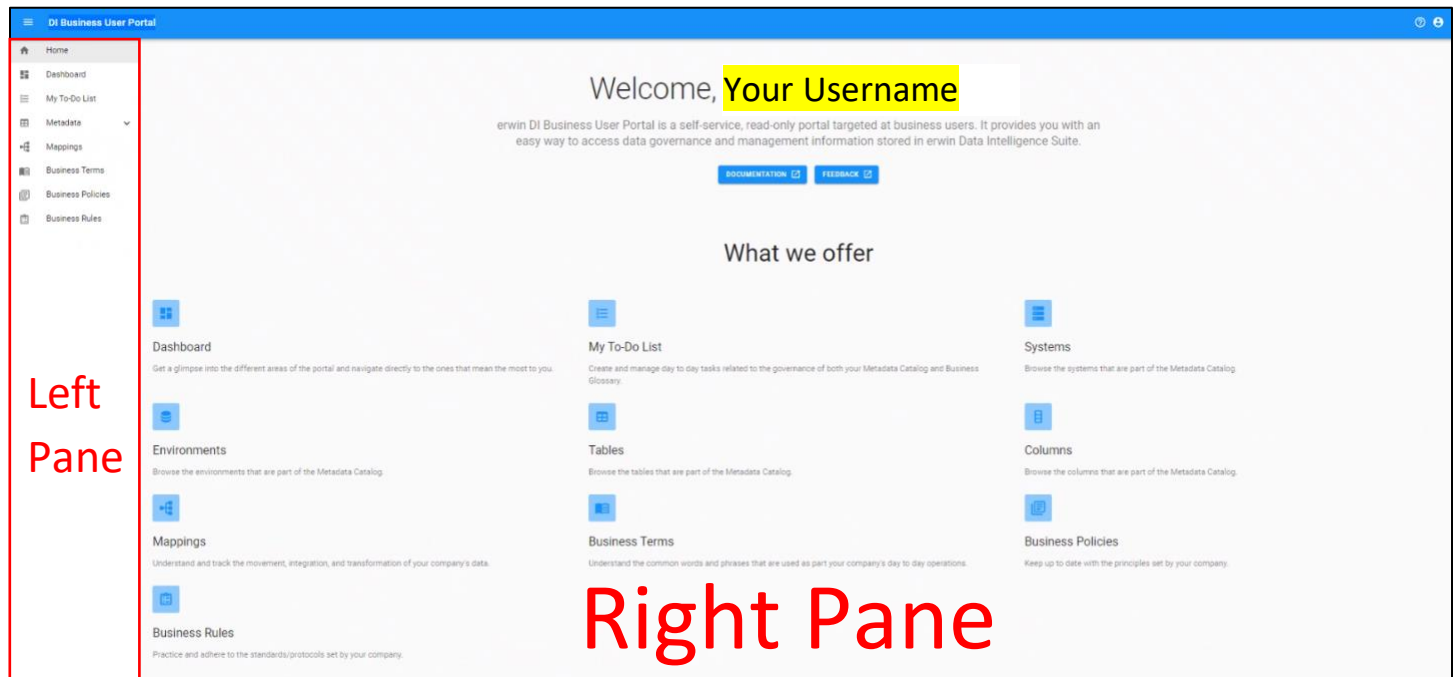
**Business Rules Functionalities:**

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

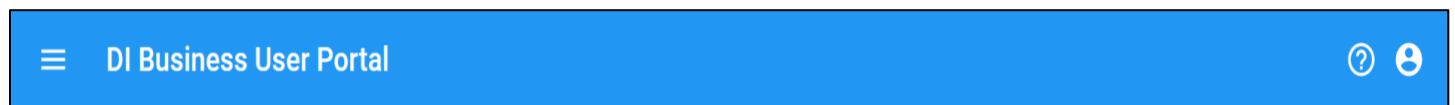
## 15. Erwin Business User Portal

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.



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

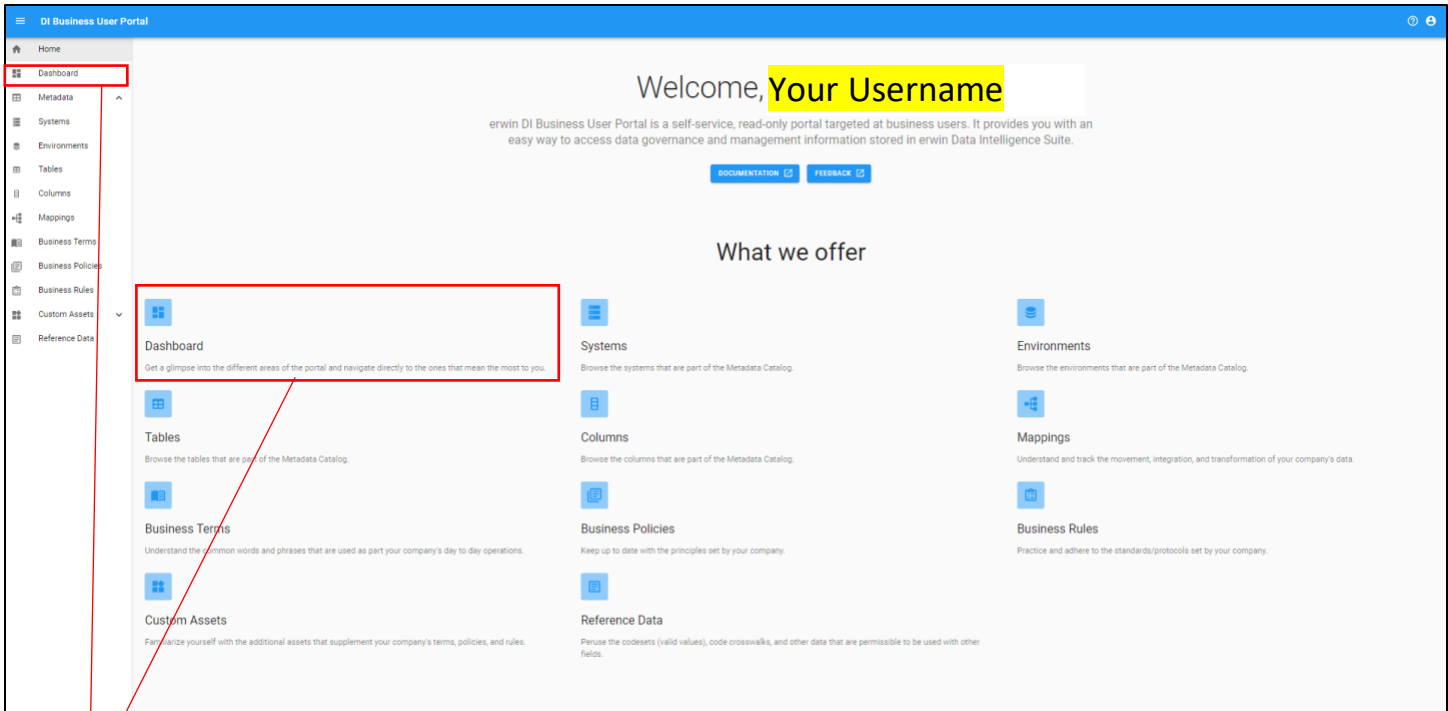


1 2 3

**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.

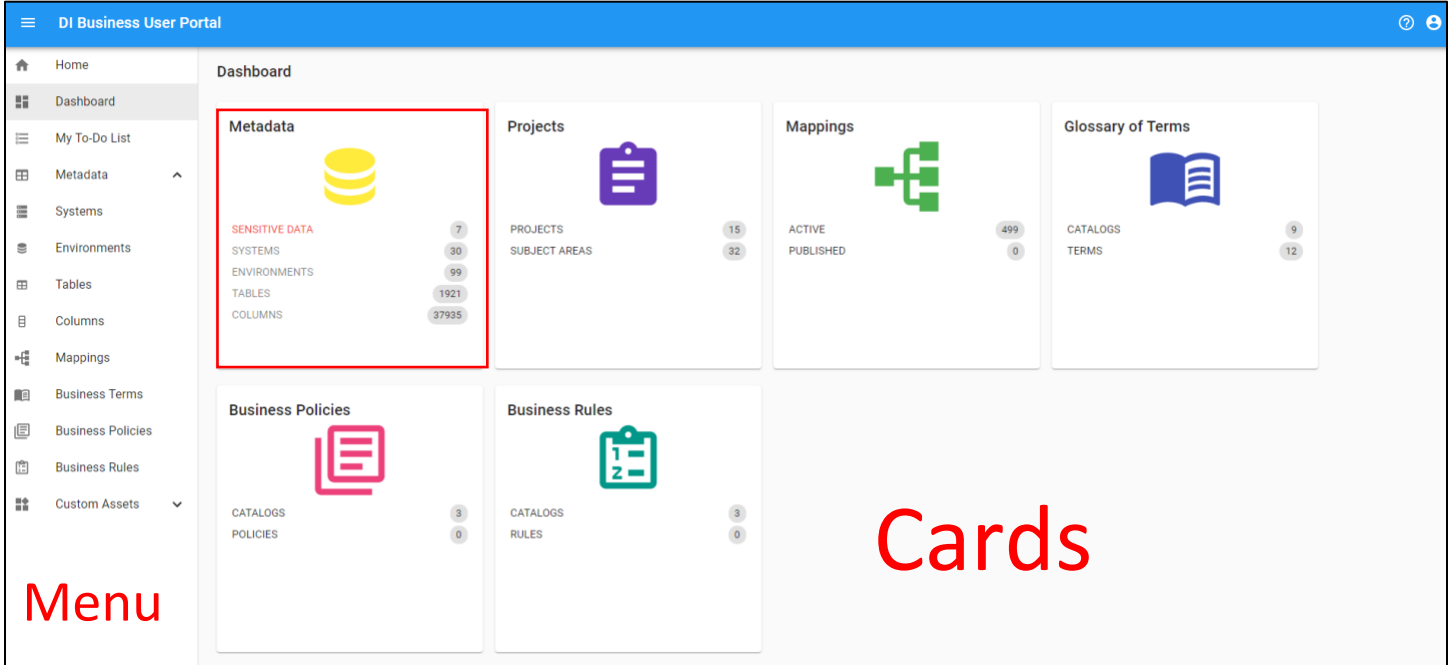
**3. Account/Logout:** Click this icon to display your account information and the log out option.



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 categories inside each card are also click-able.



*\* 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

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- 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

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### 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

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