

CA ERwin[®] Data Modeler

Guided Testing “Tours”

Version 9



This documentation, which includes embedded help systems and electronically distributed materials, (hereinafter referred to as the "Documentation") is for your informational purposes only and is subject to change or withdrawal by CA at any time.

This Documentation may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of CA. This Documentation is confidential and proprietary information of CA and may not be disclosed by you or used for any purpose other than as may be permitted in (i) a separate agreement between you and CA governing your use of the CA software to which the Documentation relates; or (ii) a separate confidentiality agreement between you and CA.

Notwithstanding the foregoing, if you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all CA copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to CA that all copies and partial copies of the Documentation have been returned to CA or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, CA PROVIDES THIS DOCUMENTATION "AS IS" WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL CA BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF CA IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is CA.

Provided with "Restricted Rights." Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2012 CA. All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

Contact CA

Contact CA Support

For your convenience, CA provides one site where you can access the information you need for your Home Office, Small Business, and Enterprise CA products. At <http://ca.com/support>, you can access the following:

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

Provide Feedback

If you have comments or questions about CA product documentation, you can send a message to techpubs@ca.com.

If you would like to provide feedback about CA product documentation, complete our short customer survey, which is available on the CA Support website at <http://ca.com/docs>.

Contents

Chapter 1: Guided Tour #1 – Install and Configure a Mart	7
Chapter 2: Guided Tour #2 – Basic Administration Tasks	9
Create a Server User	9
Create a Windows User	9
Create a Group User	10
Create/Delete a Profile.....	10
Login/Logout as a non-Admin User	11
Password Recovery	11
Chapter 3: Guided Tour #3 – Mart and User Management Tasks	13
Catalog Management	13
Open Specific Version – CA ERwin DM.....	13
Version Management – CA ERwin DM	14
Lock Management.....	15
Chapter 4: Guided Tour #4 – Permission Management Tasks	17
Assign User Permissions.....	17
Checking Authorization – CA ERwin Mart Administrator	17
Checking Authorization – CA ERwin DM	18
Session Management	18
Chapter 5: Guided Tour #5 – Upgrading an Existing Mart	19
Prerequisites for upgrading Mart.....	20
Upgrade Process.....	21
Chapter 6: Guided Tour #6 – Working with Models	23
Create An Offline Model	23
Detach A Model From the Mart	23
Change Model State During Mart Disconnect.....	24
Save An Offline Model To Your Mart	24
Chapter 7: Guided Tour #7 – Working with Model Templates	25
Binding To a Model Template:	25

Use the Template Wizard to Synchronize:	28
-----------------------------------------------	----

Chapter 8: Guided Tour #8 – Model Naming and Datatype Standards	31
------------------------------------------------------------------------	-----------

Create an NSM Option Object:.....	32
Use an NSM Template Model:	33
Import an NSM File Created Using a Previous Version:	33
Work With NSM Files:	34
Verify Naming Compliance:.....	35
Define Datatype Standards	36
Create a Datatype Mapping	36
Apply and Verify Datatype Standards	37

Index	39
--------------	-----------

Chapter 1: Guided Tour #1 – Install and Configure a Mart

Download and review all available Installation/Configuration Information, download the CA ERwin Bookshelf (go to the "By Role" section and click on System Administrator) and finally watch the "Installing the Mart" video posted in the r9 customer validation forum. After thoroughly reviewing the above mentioned information, install your new mart.

Chapter 2: Guided Tour #2 – Basic Administration Tasks

Create a Server User

1. Log in to CA ERwin Mart Administrator using your admin credentials.
2. Click User Management Pane, Add User.
3. Select Server User for User Type.
4. Enter user_1 as the username, and an Email Address to associate with this user. For example, your Email address.)
5. Click Submit.
The user account is created and an Email is sent to the user if SMTP is configured correctly. Otherwise, (SMTP is not configured), the password is set to the "default" password. (NOTE: The default password out-of-the-box is **erwin**. SMTP can be configured or the default password changed on the Settings tab of the Mart Administration application.)
6. Select the username you just created (user_1) and click Reset Password.
An Email is sent to the user with the new password. If SMTP is not configured, the password is reset to the "default" password.
7. Select the Server User (user_1) just created and click Delete User
NOTE: The user account is deleted and will not display in User Management.

Create a Windows User

1. Click User Management, Add User.
2. Select Windows User for User Type.
3. Enter a Windows Username, (e.g., abc\winuser) and Email address, (e.g., abc@abc.com <mailto:abc@abc.com>). Click Submit.
The user account is added and an Email is sent to the user, if SMTP is configured correctly.
4. Select the username you just created and click Reset Password.
The message, "Encountered error while trying to reset password for user xxxx\uuuuuuuuuu. Cannot reset password for a Windows/group user." appears.
5. Select the Windows User just created and click Delete User.
Note: The user account is deleted and will not display in User Management.

Create a Group User

For this task, make sure that you have entered the Active Directory details correctly in the Configure Mart Server dialog (this dialog appears when you start the server).

1. Click User Management, Add User.
2. Select Group User for User Type.
3. Click Group Identifier and search the existing domain group. Select a group from the list.
4. Optionally, enter the Email Address. Click Submit.
The user account is added and an Email is sent to the user, if SMTP is configured correctly.

Select the newly added Group user and click Reset Password.

Note: This button should appear "disabled" and you should not be allowed to reset the password for a Group user.

5. Select the newly added group user and click Delete User.
The user account is deleted and will not display in User Management.

Create/Delete a Profile

1. Click Profile Management, Add Profile.
2. Enter a profile name, for example, p1 and then click OK.
3. In the Permission Details section for p1, select:
 - a. Catalog Management à Open
 - b. Model à Modify
 - c. Model à View
 - d. Modeling Object à Domain à Create
4. Click Submit.
The newly created profile appears in the Profiles list with built-in profiles.
5. Click Help and review the How Profiles Work topic to understand how user profiles work in CA ERwin DM r9 mart.
6. Delete the built-in profile, Admin.
Note: The warning message, "Admin is a built-in profile. Built-in profiles cannot be modified or deleted." appears.
7. Select the profile p1 and click Delete Profile.
Note: The profile p1 is deleted and will not display in Profile Management.

Login/Logout as a non-Admin User

1. Log in to CA ERwin Mart Administrator as User_1.
2. Click Change Password.

Enter the current and new passwords.

Note: The message, 'Password changed successfully' appears and you can log on with the new credentials.

3. Click Logout.

Password Recovery

1. Click Forget Password on the CA ERwin Mart Administrator Login page.
2. Enter the username as User_1 and your valid Email address (e.g., abc@abc.com)
If you have configured SMTP correctly, an Email with the new credentials is sent via your corporate Email system; if not, the password reset to the default password provided on the Settings page.

Chapter 3: Guided Tour #3 – Mart and User Management Tasks

Catalog Management

1. Log in to CA ERwin Mart Administrator using your admin credentials.
2. Open Catalog Management.
3. Click Create Library on the menu bar.
Change the catalog name and click the <SUBMIT> button.
Note: If you wish to rename the catalog during one of your ERwin modeling session you start the Catalog Manager and press F2.
4. In the Edit Catalog section, edit the description and click Submit.
5. Follow these steps and move a model from one library to another:
6. Select a model, right-click and then click Cut on the pop-up menu (or press Ctrl + X).
7. Select the target library, right-click and click Paste on the pop-up menu (or press Ctrl-V).
Note: You can also move models between libraries using a "click-and-drag" operation.
Select a catalog entry, right-click and then click Delete on the pop-up menu (or you can just click on Delete Catalog on the menu bar).
Note: The catalog entry is permanently deleted from Mart and it cannot be recovered.
8. Click Logout.

Open Specific Version – CA ERwin DM

1. Start ERwin DM r9 and connect to your mart.
2. Open the Mart Open Model dialog.
3. Select a model, and then select a specific version in the version dropdown list.
4. Click Open to open the selected model version.

Version Management – CA ERwin DM

When you save a model change to mart, a Delta version is created.

1. Follow these steps and create a named version:
 - a. Open the Catalog Manager from inside ERwin DM.
 - b. Select either a Named version or a delta version of a data model and click Mark Version.
 - c. In the Edit Catalog section, edit the description and click Apply.
2. Hide a model version by selecting the version from the Catalog pane, and clicking Hide Version.
3. Unhide a model version by selecting a model and clicking Unhide Version. From the Hidden versions dialog. Select and highlight the version(s) you wish to unhide and then click OK.
4. Follow these steps and compare two versions:
 - a. Select a version in the Catalog tree, press the <Ctrl> key and select another version in same model.
 - b. Right-click on one of the highlighted versions and then click Compare from the pop-up menu to open the Complete Compare wizard to compare the two highlighted versions.

Lock Management

When you edit a catalog entry, locks are applied automatically to appropriate levels in the catalog to prevent other users from editing the entry. When the edit is complete, the locks are removed or downgraded automatically. Administrators may observe and manage locks in the Catalog Manager associated with the Mart Administrator. Modelers can manage their own locks in the CA ERwin DM catalog manager.

1. Open a model without specifying any lock type. A Shared Lock is applied to the model and automatically removed after the model is loaded.
2. Open a model with a specific lock type. That lock is retained even after the model is opened.

Try and verify this functionality by applying and removing different lock types!

3. Save a model to your mart. An Update Lock is applied to the parent library, while the model is being saved and automatically removed after the model is saved.
4. Save a model incrementally to your mart. An Update Lock is applied to all the versions created between the opened version and the newly created version. All locks are automatically removed after the incremental model saved has finished.
5. Delete a model from your mart. An Exclusive Lock is applied to the model and automatically removed after the model is deleted.
6. Rename a library. An Update Lock is applied to the library and automatically removed after the model is renamed.
7. Open two model versions for version compare. A Shared Lock is applied to the root model and automatically removed after the model versions are opened.
8. Merge or import objects during a version compare. An Update Lock is applied to the root model and automatically removed after the merge or import is complete.

Chapter 4: Guided Tour #4 – Permission Management Tasks

Assign User Permissions

1. Log in to CA ERwin Mart Administrator using your admin credentials.
2. Click Permission Management.
3. Select Mart from the Select Catalog pane and user "user_1" from the Select User/Group pane. Create this user if it doesn't already exist. (See Guided Tour #2.)
4. Drag the selected user and drop it under profile "p1", or click the Assign profile icon (right facing arrow). Create this profile if it doesn't already exist. (See Guided Tour #2.)
5. Click Submit.
NOTE: Before Submitting your changes, you should verify your changes. You may do so by clicking Review Changes. A dialog is displayed on which you may select and remove incorrect or unattended changes.
6. The selected user is now displayed under the intended profile.
7. Click Logout.

Checking Authorization – CA ERwin Mart Administrator

1. Log in to CA ERwin Mart Administrator as user_1.
2. Click Catalog Management.
You will be able to see Catalog Management. You cannot access any other pane, because the profile p1 has only the Open permission on Catalog Management.
3. Click User Management.
The message, "User does not have the required View Users permission on User Management. Please contact the Mart Administrator for the required permission" appears.

Checking Authorization – CA ERwin DM

1. Connect to your mart using the administrator credentials and create a model, for example, model_1.
2. Disconnect from Mart and connect again using user_1 credentials.
3. Open model model_1 and create a domain, for example Domain_123.
4. Try to create a default value.

The message "You do not have the create permission on Default. Please contact Mart Administrator" should appear.

Session Management

1. Log in to your mart with the same credentials from one or more instances of CA ERwin Mart Administrator and from one or more instances of CA ERwin DM.
2. Log in to your mart using different users in multiple instances of ERwin.
3. From one of the open CA ERwin DM instances, click File à Mart à Session Manager. A dialog containing user information, session status and existing locks is displayed. In addition, you should note the following:
 - Users can see only their sessions.
 - Active sessions cannot be deleted.
 - Offline models (if any) from the sessions displayed also appear.

Chapter 5: Guided Tour #5 – Upgrading an Existing Mart

CA ERwin DM r9.0 includes a utility to upgrade from a CA ERwin DM r8.x version mart to CA ERwin DM r9.0 mart. The Upgrade Mart utility lets you upgrade not just models, but users, profiles, and permissions as well. This utility also lets you upgrade to a different database.

Prerequisites for upgrading Mart

- The source mart is CA ERwin DM r8.0 or later.
Note: If you are using an older version of CA ERwin DM, upgrade to CA ERwin DM release 8.x before you start the upgrade process.
- The models in the source mart must not have any locks.
- A CA ERwin DM r9.0 mart is has been created.
- A minimum of 2-GB space is available on the drive on which you select the working directory.
- Prerequisites for the computer on which you run the upgrade process are as follows:
 - **The operating system is 32-bit.**
(Note: If you do not have a 32-bit Windows workstation to run the mart upgrade on, you may use the "work around" documented here:
<http://www.gfi.com/blog/32bit-object-64bit-environment/>
<http://www.gfi.com/blog/32bit-object-64bit-environment/>)
 - A licensed copy of CA ERwin DM r8.x must be available.
Note: If you are using CA ERwin DM r8.0 or r8.1, copy the license as given below.

For Windows XP and Windows 2003

- **Copy from:** C:\Documents and Settings\\Local Settings\Application Data\CA\ERwin Data Modeler\8.0
- **Copy to:** C:\Documents and Settings\All Users\Application Data\CA\ERwin Data Modeler\8

For Windows 7 and Windows 2008

- **Copy from:** C:\Users\\AppData\Local\CA\ERwin Data Modeler\8.0
- **Copy to:** C:\Program Data\CA\ERwin Data Modeler\8
- The database client for the source mart database must be installed. For example, if your source mart database is Microsoft SQL Server, install SQL Server Native Client on the computer where you run the upgrade process.

Upgrade Process

1. Select the working directory. This is the folder where the configuration and log files will be stored by the upgrade utility.
2. Enter the Source mart details.
3. Enter the Destination mart details.
4. Select the data and the objects that you want to upgrade, including the versions of your models. You can upgrade models in the following ways:
 - Upgrade the top 'n' versions.
 - Upgrade only the marked versions.
 - Upgrade all marked versions and the top 'n' versions.
 - Upgrade all the versions of all the models.
NOTE: Choose the best way that helps you get started with your work quickly. Upgrading Users and Profiles are mandatory in order to upgrade Models.
5. Select Upgrade Options and provide all required information to upgrade.
6. Select the models which need to be upgraded and click Finish.
7. Click Details on the Upgrade Process dialog to view the status of the upgrade while the upgrade is in progress.
8. You may pause the upgrade process if necessary.
Note: When you pause the upgrade process, the utility completes the upgrade of the current model and then stops. When restarting the upgrade process, the utility will continue from the point it had stopped. (It is important that you select the same working directory.) The upgrade utility will display the models that are not yet upgraded in the list of models. If there are several models remaining, you can select a subset (or all) to upgrade. Also, when restarting the upgrade process, the source and destination mart information as well as the model version details (except password fields) are filled in automatically.

Chapter 6: Guided Tour #6 – Working with Models

Create An Offline Model

1. Start CA ERwin DM and open a model from your mart.
2. Click File à Save (or Save As)
3. Select a folder accessible to your local machine and enter a new name for the model. The default is for ERwin DM to use the same name as that of the mart model.
4. Click Save and the "Save Model Offline or Detach Model From Mart" dialog is displayed.
5. Click Offline.
The open model is saved and the status bar is updated to display "Offline Mart Mode".
6. Disconnect from your mart and work on this model in the offline mode.
Note: Object type permissions are applied as you work on the offline model and if any action taken conflicts with granted permissions you will be given an opportunity to Detach the model.

Detach A Model From the Mart

1. Start CA ERwin DM and open a model from your mart. (You may also continue using the open offline model from the step above.)
2. Click File à Save (or Save As)
3. Select a folder accessible to your local machine and enter a new name for the model. The default is for ERwin DM to use the same name as that of the mart model.
4. Click Save and the "Save Model Offline or Detach Model From Mart" dialog is displayed.
5. Click Detach.
The open model is saved, and the status bar is updated to display "Non-Mart Model".

Change Model State During Mart Disconnect

1. Start CA ERwin DM and open a model from your mart.
2. Optionally, make some changes to the open model.
3. Click File, Mart, Disconnect.
4. If the open model has been modified (Step #2 above):
 - a. The Save Mart Models dialog is displayed allowing you save (or not) the changes made back to your mart.
 - b. Click OK (or Cancel)
5. The Mart Offline dialog is displayed. Use the "Save To" drop-down list to update the model status as appropriate:
 - a. Select "Offline", "Detach" or "Close".
 - b. Click OK.

Save An Offline Model To Your Mart

1. Open an offline model from your local machine.
2. Make some changes to the open offline model. For example you could:
 - a. Add a new entity, table, attribute, column or relationship
 - b. Deleted an existing entity, table, attribute, column or relationship
 - c. Modify one or more existing object properties
3. Connect to your mart, if you have not already done so.
4. Click File, Mart, Save.
The changes made in Step #2 above, are incrementally saved back to your mart.

Chapter 7: Guided Tour #7 – Working with Model Templates

Binding To a Model Template:

The ability to create, manage and work with Active Model Templates (AMT) was first introduced in CA ERwin DM r8. Those templates were only file-based. In addition to some new capabilities, r9 extended AMT to include mart-based templates. We suggest you perform the activities below first with file-based templates and then again with mart-based ones.

These scenarios presented, focus on two areas:

1. Integration of the new Active Model Templates feature with the New Model dialog.
2. Addressing user requests to create models from templates without being forced to have the same model type as the template (model type cannot be switched after the fact) and without resorting to either Derive Model or Complete Compare.

You may create models from templates in one of two different ways:

1. Make a copy of the template file and rename the new file with a ".erwin" file extension.
2. Create a model of the specified type and then bind to the desired template in the Model New dialog. (Same as if the user created a new <default> model and then selected "Bind Template" from the File, Model Templates menu.)

The first approach produces an exact image of the template while the second produces the closest image it can by performing incremental steps. Note: These two approaches will generally produce the same result, but it is not guaranteed to be the case. Also, the model created using the second (and preferred approach) retains a link to the template file, thus permitting a modeler to manage ongoing metadata updates reflected in the template file.

Pre-requisites

Make sure that either an ".erwin" or ".erwin_tmpl" template model is available in your machine or mart.

Steps:

1. Create a new Logical/Physical, Logical, or a Physical model.
2. Click File à Model Templates à Bind Template.
3. Click the Browse Files or Browse Mart icon and then select the desired template model file from your machine or mart. (You can also select a previously used template model by using the drop-down list provided.)
4. Click Open.
5. Make sure that the default option 'Load the entire contents of the template' is selected.
6. Click OK.
7. Verify that all objects of the selected template model are bound without any error.

Scenario #1: Create a model without using a model template

1. Open CA ERwin DM and click New.
2. Select Logical, Physical, or Logical/Physical.
3. If you have selected Physical or Logical/Physical, select an appropriate target server.
4. Leave the template set to <Default>.
5. Click OK.
6. Click Files à Model Templates à Bind Template...
7. Click the Browse Files or Browse Mart icon and then select the desired template model file from your machine or mart. (You can also select a previously used template model by using the drop-down list provided.)
8. Verify that the <Load the entire contents of the template> radio button is selected and click OK.
9. If you wish for CA ERwin DM to automatically maintain synchronization with the model template each time you open your model, click Files à Model Templates à Synchronize on Model Load before you save and close your model.

Scenario #2: Create a model that is an exact image of a model template

1. Open CA ERwin DM and click New.
2. Select Match Template.
3. Click the Browse Files or Browse Mart icon and then select the desired template model file from your machine or mart. (You can also select a previously used template model by using the drop-down list provided.)

4. Select the "Preserve the template binding" checkbox if you wish to bind the template model to the new model you are creating.
5. Click OK and validate that your new model is an exact copy of the selected model template.

Use the Template Wizard to Synchronize:

Pre-requisites

Make sure that either an ".erwin" or ".erwin_tmpl" template model is available in your machine or mart.

Steps:

1. Create a new Logical/Physical, Logical, or a Physical model.
2. Click File à Model Templates à Bind Template.
3. Click the Browse Files or Browse Mart icon and then select the desired template model file from your machine or mart. (You can also select a previously used template model by using the drop-down list provided.)
4. Click Open.
5. Click Run the Template Wizard to select objects for synchronization.
6. Click OK and the Model Template Synchronization window appears. If required, click the HELP button to read and become familiar with the operation of this dialog.
7. Click on Metamodel (left side of screen) and then chose the specific action (SYNCHRONIZE, DEFER, or IGNORE) you wish to take for each individual UDP property listed from the Template model.
8. Click on Model (left side of screen) and then choose the specific action (SYNCHRONIZE, DEFER, or IGNORE) you wish to take for each model object listed from the Template model.
9. Click on Settings (left side of screen) and then choose "Ignore synchronization of the root Model object" if you want to block the importation of the Model Explorer properties from the Template model.
10. Click Finish and the Template model objects will be imported into your new model based on the SYNCHRONIZE, DEFER, and IGNORE option selections made.

Scenario #3: Create a model that is synchronized with a model template, but has a different model type

1. Open CA ERwin DM and click New.
2. Select desired new model type:
 - a. Logical
 - b. Physical (or Logical/Physical)
3. If you selected physical or logical/physical then you must also select the "Match template target server" checkbox to ensure full synchronization with the model template.
4. Select a template other than <Default> using the drop-down list or by clicking on one of the two Browse template icons.

5. Select the "Preserve the template binding" checkbox if you wish to bind the template model to the new model you are creating.
6. Click OK and validate that your new model is synchronized with the model template but is a different model type.

Scenario #4: Create a model that is synchronized with a model template, but has a different model type and target server (not a best practice for AMT)

1. Open CA ERwin DM and click New.
2. Select Physical or Logical/Physical.
3. Select a target server that is different from that of the model template you plan to use.
4. Select a template other than <Default> using the drop-down list or by clicking on one of the two Browse template icons.
5. Select the "Preserve the template binding" checkbox if you wish to bind the template model to the new model you are creating.
6. Click OK and validate that your new model is synchronized with the model template but is a different model type and has a different target server.

Chapter 8: Guided Tour #8 – Model Naming and Datatype Standards

Beginning with r9, model naming and datatype standards are integrated into the CA ERwin DM model file and not managed as a separate external file. In addition to a few "tweaks" we have added, you should be aware of:

1. Multiple standards files may be associated with each model (e.g. test related naming and datatype standards as well as production naming and datatype standards). However, only one standard (of each type) can be "active" at any one time.
2. Sharing of naming and datatype standards files between models / modelers is accomplished using the Active Model Template functionality (see Guided Tour #7). Make sure you use the automatic synchronization capability if you wish for these standards to remain current.

Create an NSM Option Object:

1. Open CA ERwin DM and create a new Logical/Physical model (any target database is fine).
2. Add several entities to this model, including: CUSTOMER, EMPLOYEE, PRODUCT, SALES ORDER and any others you wish.
3. Use either the Model Explorer or the CA ERwin DM menus to create and name an NSM Option Object (e.g., My NSM).
4. Add about a dozen words to the Glossary tab for the newly created NSM Option Object. Be sure to include SALES and ORDER as well as several other words used to name entities in your model.
5. Select the Match Whole Words Only and Is Active check boxes.
6. Selecting *Match Whole Words Only* ensures that when you apply the naming standards to a model, CA ERwin DM performs glossary substitution on whole words only. Clearing this check box will allow CA ERwin DM to perform glossary abbreviation substitution on complete words, as well as on parts of words or substrings.
7. Select Actions à Model Naming Options and then click on the Name Mapping tab. Click on the Use Glossary check box for the "Entity to Table" and the "Attribute to Column" object types and then click OK.
8. Change the model from Logical to Physical view and verify that the naming standards are applied correctly to the selected objects on the Physical side of your model.
9. Close and SAVE the model as a CA ERwin DM model or as a CA ERwin DM template model to your mart. Give this new model / model template a memorable name (e.g., My NSM).

Use an NSM Template Model:

1. Create a New Logical/Physical Model.
2. Apply the saved AMT from the previous scenario to this new model. (Review Guided Tour #7, if necessary.)
3. Verify that the expected NSM Option Object is bound to the current Model.

Variation:

Perform the last scenario again, this time choose the correct settings so that only the NSM objects are automatically synchronized on model load, and NOT the entire model template.

Import an NSM File Created Using a Previous Version:

1. Open CA ERwin DM and create a new Logical/Physical model with several entities.
2. Use either the Model Explorer or the CA ERwin DM menus to create and name an NSM Option Object (e.g., My NSM).
3. Click the "Import Other" menu icon in the upper portion of the NSM Option Editor dialog. Use the "OPEN" dialog that appears to navigate to and select an existing .NSM file. CA ERwin DM will automatically add a new NSM Option Object to your model containing the contents of this .NSM file.
4. Select the Glossary tab to validate that all the expected glossary items have been added to your new model. Click OK to exit the NSM Option Editor dialog.
5. Save your model, but do not close it before continuing on to the next scenario.

Note: If you do not have an .NSM file available, you can easily create a sample one using any prior version of CA ERwin DM (r8 or older).

Work With NSM Files:

1. Open the NSM Option Editor, select the Glossary tab and click the Export to CSV menu icon.
2. Type a file name (for example, "My Glossary") and click Save.
3. Create a new NSM Option Object.
4. Select your new NSM Option Object and click the Import menu icon on the Glossary tab.
5. Use the "OPEN" dialog that appears to navigate to and select the exported NSM file created in Step #2 above.
6. After the selected NSM file is read into your model verify the imported values displayed on the Glossary tab of the new NSM Option Object are the ones you previously exported.
7. Delete one or more of the imported rows from the new NSM Option Object.

Variation:

1. Open the exported NSM file (created in Steps #1 and #2 above) in Excel or an equivalent spread sheet application.
2. Modify some of the contents of the file by changing values, adding new rows and deleting some existing rows.
3. Open the NSM Option Editor in CA ERwin DM (if not already open), select the NSM Option Object used to create the exported NSM file and then select the Glossary tab.
4. Click on the Import from CSV menu icon and choose to MERGE the import information with the current list. Verify that the changes you expected to see are reflected after the import action.
5. Save and close your model.

Verify Naming Compliance:

1. Open CA ERwin DM and create a new Logical/Physical model with a CUSTOMER entity containing several attributes (e.g., customer identification number, customer first name, customer last name, customer street address, etc.).
2. Create and name an NSM Option Object and make the following settings on the Logical and Physical tabs:
 - a. Set "Part 1" to Prime for entity and attribute (logical) as well as for table and column (physical).
 - b. Set "Part 2" to Modifier 1 for attribute (logical) and for column (physical).
 - c. Set "Part 3" to Class for attribute (logical) and for column (physical).
3. Switch to the Glossary tab and add the following words and word classifications:
 - a. customer, **p**
 - b. first, **m1**
 - c. last **m1**
 - d. name, **c,**
 - e. number, **c**
4. Make sure you have selected the "Match Whole Words" and "Is Active" check boxes.
5. Select Actions à Model Naming Options. Select the Name Mapping tab and enable your glossary for: "Entity to Table" and "Attribute to Column".
6. Select Tools à Standards à Check Naming Standards Compliance and then select the objects for which you want to verify compliance in the Select Objects to Check section (e.g., Entities and Attributes). Select the "Check Word Order and Position" checkbox to verify if naming standards are applied in the order that you have defined.
7. Click <Start> to verify compliance. Validate the errors that are displayed. (NOTE: If all names comply with the standards defined, the only message you should see is: "Name check finished!".)

Variations:

Complete your glossary so ensure there are no errors displayed when you re-run the scenario above.

Replace some of the individual words in your current glossary list with compound words (e.g., replace "first" and "name" with "first name") to see the effect this has on your compliance checking.

Note: To only check for word and position compliance on the logical side of a model, you do not need to use the "Use Glossary" Model Naming Option.

Define Datatype Standards

1. Create and name new DSM Options Object. (By now, you should have good idea how to do this at least two different ways.)
2. Select the Logical Definition tab and modify the Domain, Length, Precision, and Default Length values for at least one of the displayed datatypes.
3. Create and name (e.g., testchar) a new logical datatype and give it unique properties.
4. Delete one or more "standard" logical datatypes from the DSM Option Object. (NOTE: Do not delete the new logical datatype created in Step #3 above.)
5. Click Close and save your model changes to your mart.

Create a Datatype Mapping

1. Open the DSM Option Editor, select the Mapping tab and click the "New" menu icon.
2. Click the "Edit" menu icon and optionally give your Mapping object a name (e.g., My Mapping).
3. Using the Mapping tab on the DSM Datatype Mapping Editor, select "Logical" as the source database from the "From" drop-down list and select any of the databases displayed as your target from the "To" drop-down list.
4. Update the "To Datatype" for the logical datatype (e.g., testchar) created in the previous scenario.
5. Add one or more new mapping datatypes.
6. Close all editor dialogs and save your model.

Apply and Verify Datatype Standards

1. Re-open the DSM Options Editor, activate your previously created DSM Option Object by clicking the "*Is Active*" check box and then click Close.
2. Assign your created logical datatype (e.g., testchar) to an attribute in your model. If you no longer have any attributes associated with your model, create one. (NOTE: Your user defined datatype should appear in the Logical datatype drop-down list of the Attribute editor.).
3. Switch from logical to physical and verify that your user defined attribute datatype is converted to the appropriate physical datatype that you have defined in the previous scenario. (HINT: If the datatype is incorrect, check your model's selected target database.)

Index

A

Apply and Verify Datatype Standards • 37
Assign User Permissions • 17

B

Binding To a Model Template: • 25

C

Catalog Management • 13
Change Model State During Mart Disconnect • 24
Checking Authorization – CA ERwin DM • 18
Checking Authorization – CA ERwin Mart
Administrator • 17
Contact CA • iii
Create a Datatype Mapping • 36
Create a Group User • 10
Create a Server User • 9
Create a Windows User • 9
Create an NSM Option Object: • 32
Create An Offline Model • 23
Create/Delete a Profile • 10

D

Define Datatype Standards • 36
Detach A Model From the Mart • 23

G

Guided Tour #1 – Install and Configure a Mart • 7
Guided Tour #2 – Basic Administration Tasks • 9
Guided Tour #3 – Mart and User Management Tasks
• 13
Guided Tour #4 – Permission Management Tasks •
17
Guided Tour #5 – Upgrading an Existing Mart • 19
Guided Tour #6 – Working with Models • 23
Guided Tour #7 – Working with Model Templates •
25
Guided Tour #8 – Model Naming and Datatype
Standards • 31

I

Import an NSM File Created Using a Previous
Version: • 33

L

Lock Management • 15
Login/Logout as a non-Admin User • 11

O

Open Specific Version – CA ERwin DM • 13

P

Password Recovery • 11
Prerequisites for upgrading Mart • 20

S

Save An Offline Model To Your Mart • 24
Session Management • 18

U

Upgrade Process • 21
Use an NSM Template Model: • 33
Use the Template Wizard to Synchronize: • 28

V

Verify Naming Compliance: • 35
Version Management – CA ERwin DM • 14

W

Work With NSM Files: • 34