



# Creating Custom UDPs in erwin Data Modeler

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Data Administration and Engineering Services

OIT | EADG | DEA | DAES

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# Overview

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User Defined Properties (UDPs) add metadata to objects in a data model. In erwin, UDPs can be created for many object classes including Attributes, Entities, Models, Relationships, Diagrams, and Subject Areas, UDPs are flexible, modifiable and may have preset values.

A Data Model utilizing UDPs is more mature and robust as it is capable of providing not just a structural representation of the system, but it is also able to show any auxiliary information that may be related to the business requirements, security, sources or any other important details associated with the system. The information described by a UDP can be anything deemed relevant in context of the project or system.

User Defined Properties are established within erwin IDE via tool configuration. They may exist on multiple levels of the data model, both logical and physical. CMS is interested in the Model, Entity, Attribute and Relationship UDPs at the Logical level of the Data Model. CMS strongly recommends having User Defined Properties in your data model for the model, entity, and attribute levels.

# CMS Recommended Model Level UDPs

UDP	Description	Business Reason
Project Name	Name of the project	Tracking project and model names and releases
Model Name	Name of the model	
Model Release Number	Release/version number	
Model Author	Author of the model	Tracking affected people or parties
Model Business Owner	Owner of the model	
Model Version Effective Date	Version effective date	Tracking model development lifecycle
Model DAES Approval Date	DAES approval date	

# CMS Recommended Entity Level UDPs

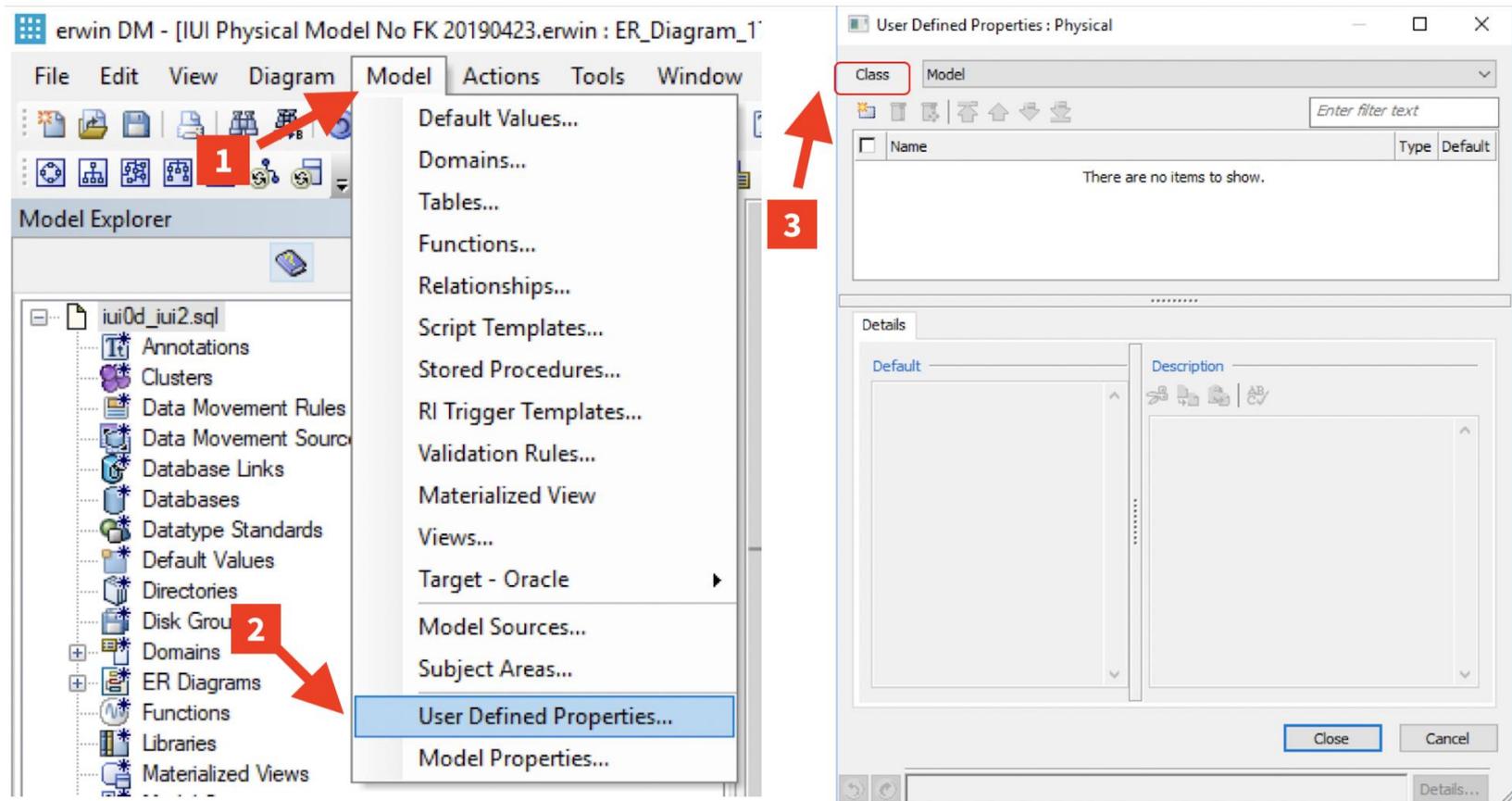
UDP	Description	Business Reason
Entity Requirement ID	Requirement ID for the entity	Explains why we created this entity
Entity Data Source (optional)	Data source to load the entity	Explains where we load this entity from (if different attributes loaded from different sources, this UDP should be provided on the attribute level)
Entity Security Category (optional)	Security, PHI or PII category for the entity	Explains access level to the entity (if different attributes has different security or PHI/PII categories, this UDP should be provided on the attribute level)

# CMS Recommended Attribute Level UDPs

UDP	Description	Business Reason
Attribute Data Source	Source of Records to load this attribute	Those two UDPs defines where this attribute loaded from – Source of Records and its Element. Works as a composite primary key for data source element
Attribute Data Source Element	Source of Records element to load this attribute	
Attribute Security Category (optional)	Security or PHI/PII category for the attribute	If the same for all attributes in an entity, may be provided on the entity level
Attribute Valid Values (optional)	Valid values for the attribute	List of valid values for the attribute in a free text form (if acceptable)

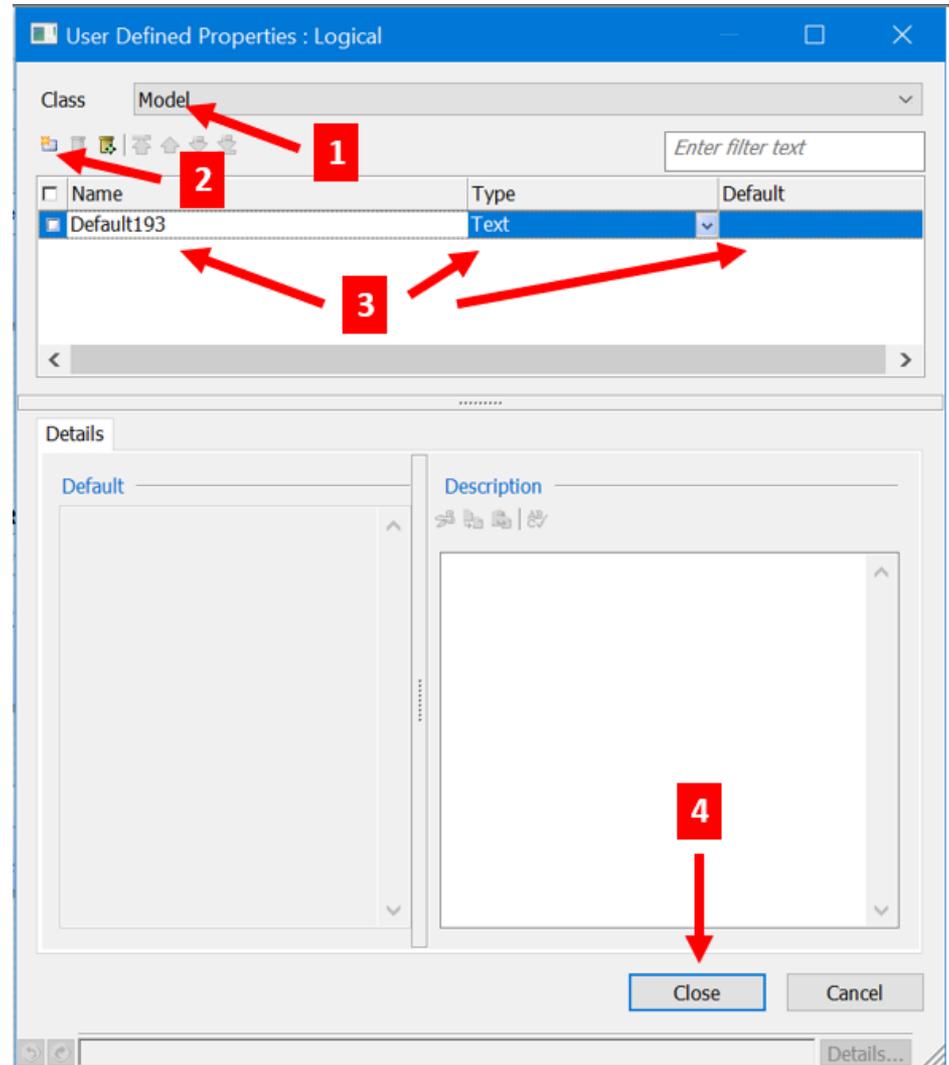
# Starting Point

Begin by selecting **Model > User Defined Properties** in the erwin main menu and then selecting the **Class** dropdown control in the resulting window.



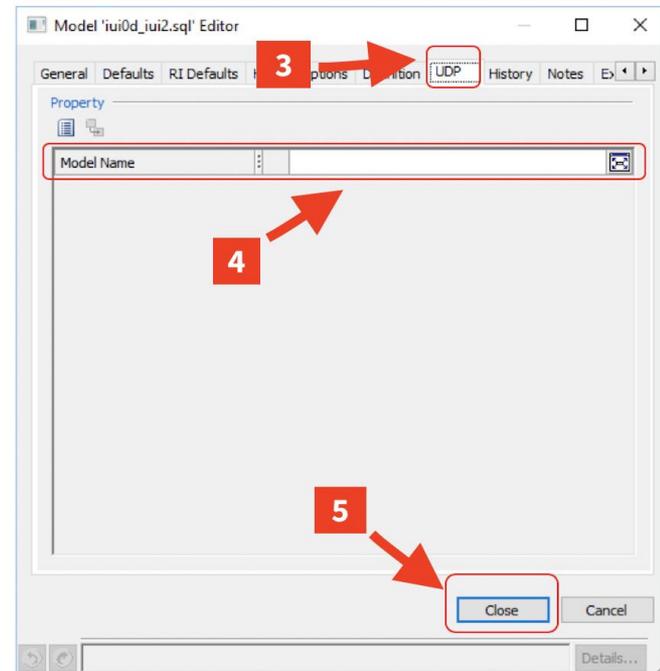
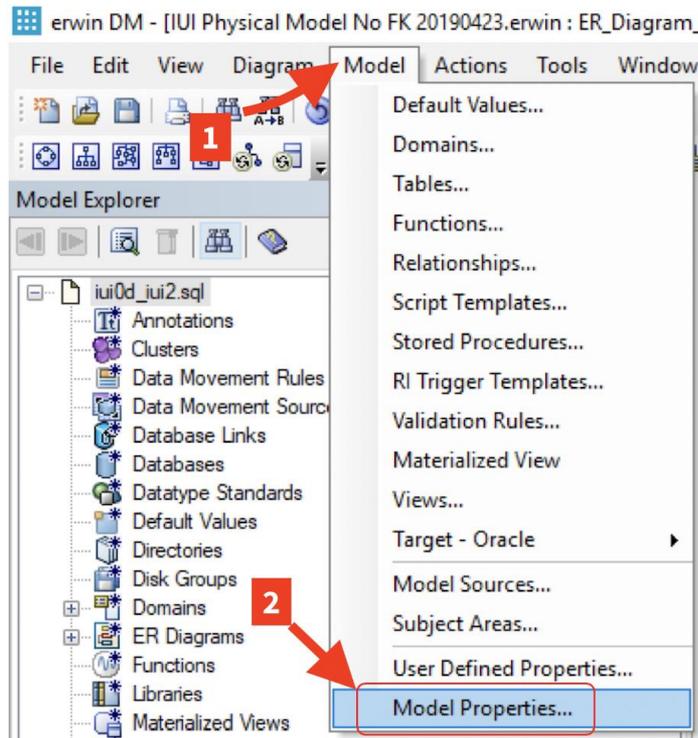
# Creating Model-Level UDPs (1 of 2)

- Select the **Model** class.
- Click the **New** button.
- Provide Name, Type, and (optional) Default values.
- Click the **Close** button.



# Creating Model-Level UDPs (2 of 2)

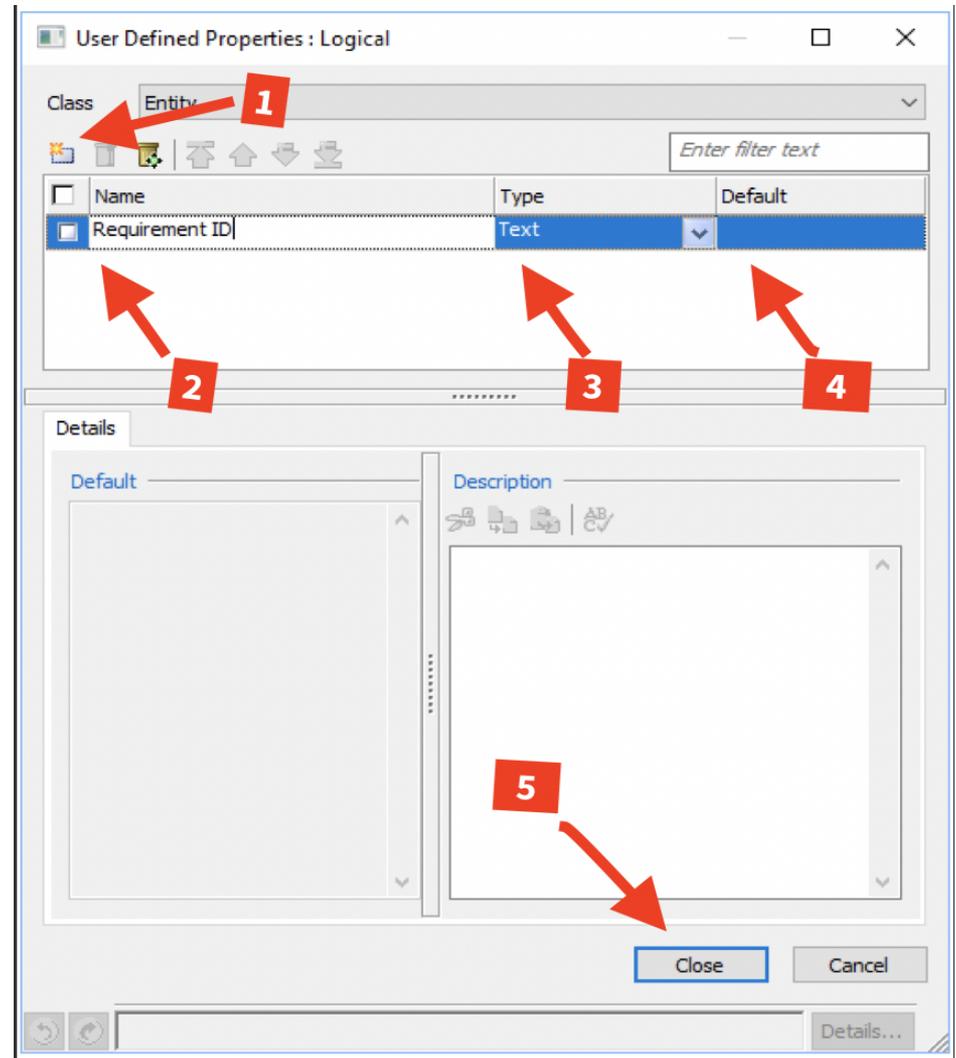
- Select **Model** > **Model Properties** in the erwin main menu.
- Open the **UDP** tab in the resulting window.
- Select the UDP created in the previous steps and add the appropriate value.
- Select the **Close** button.



# Creating Entity-Level UDPs (1 of 2)

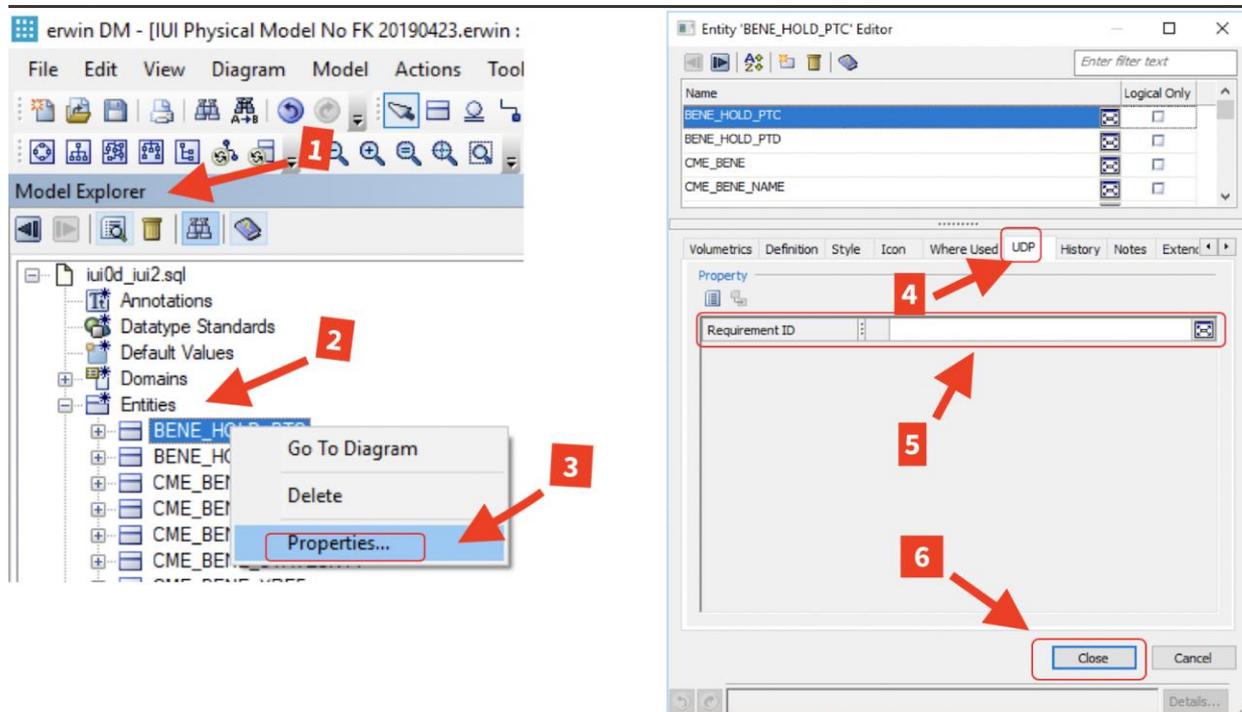
After following the steps in the **Starting Point** slide:

- Select the **Entity** class.
- Click the **New** button.
- Provide Name, Type, and (optional) Default values.
- Click the **Close** button.



# Creating Entity-Level UDPs (2 of 2)

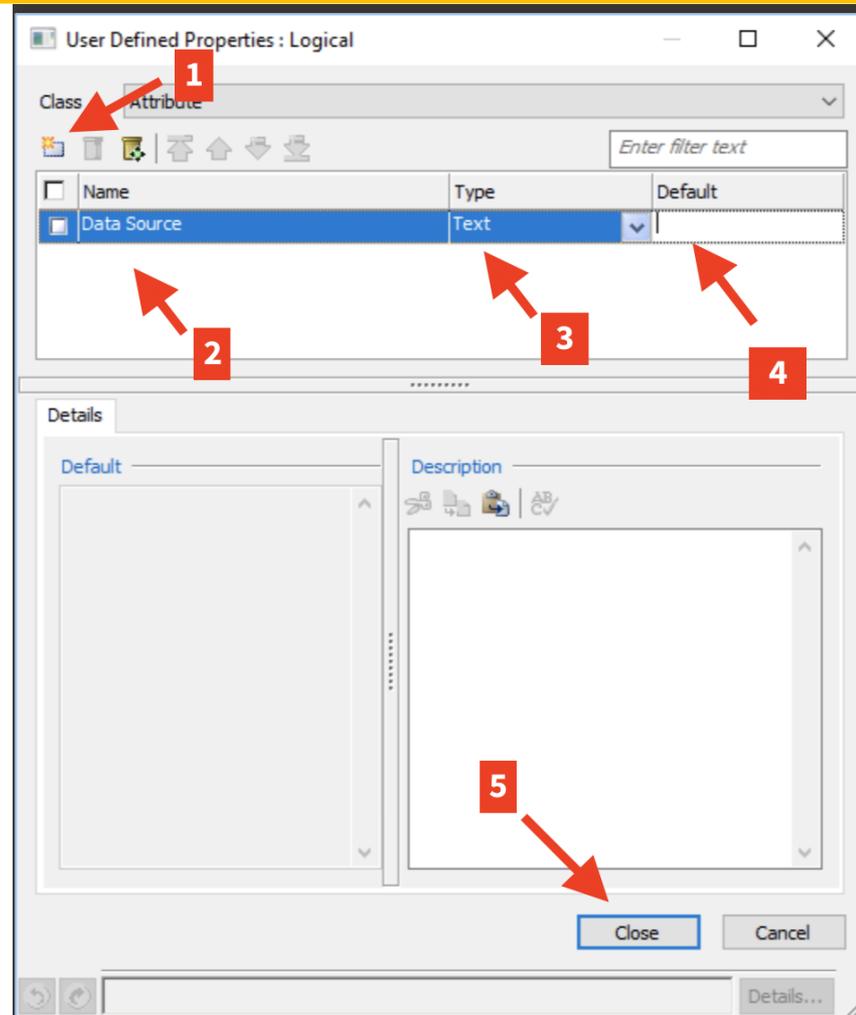
- From erwin's **Model Explorer**, expand the **Entities** tree, right-click the appropriate **Entity**, and select **Properties**.
- Open the **UDP** tab in the resulting window.
- Select the UDP created in the previous steps and add the appropriate value.
- Select the **Close** button.



# Creating Attribute-Level UDPs (1 of 2)

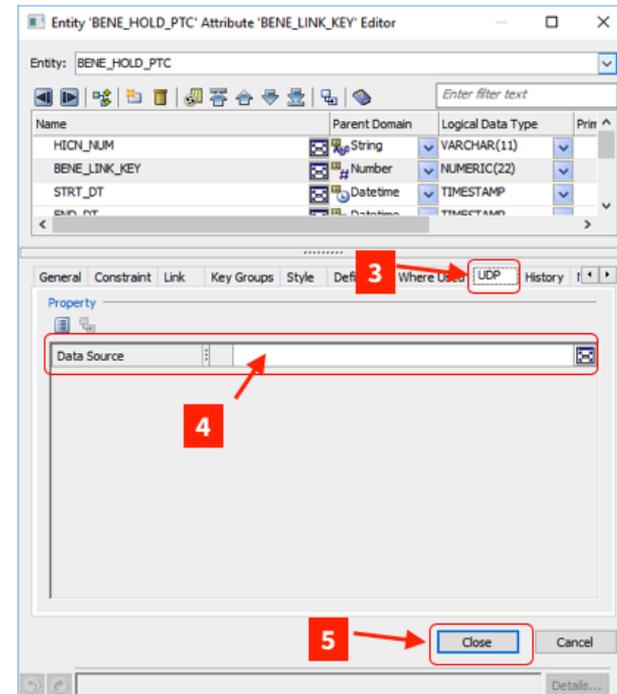
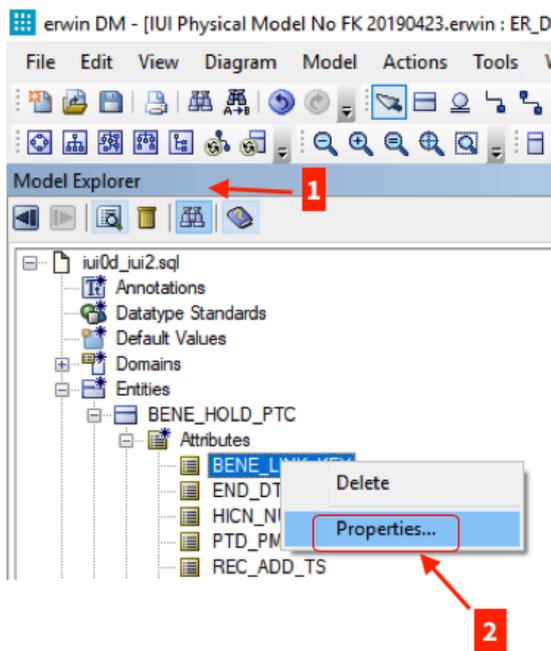
After following the steps in the **Starting Point** slide:

- Select the **Attribute** class.
- Click the **New** button.
- Provide Name, Type, and (optional) Default values.
- Click the **Close** button.



# Creating Attribute-Level UDPs (2 of 2)

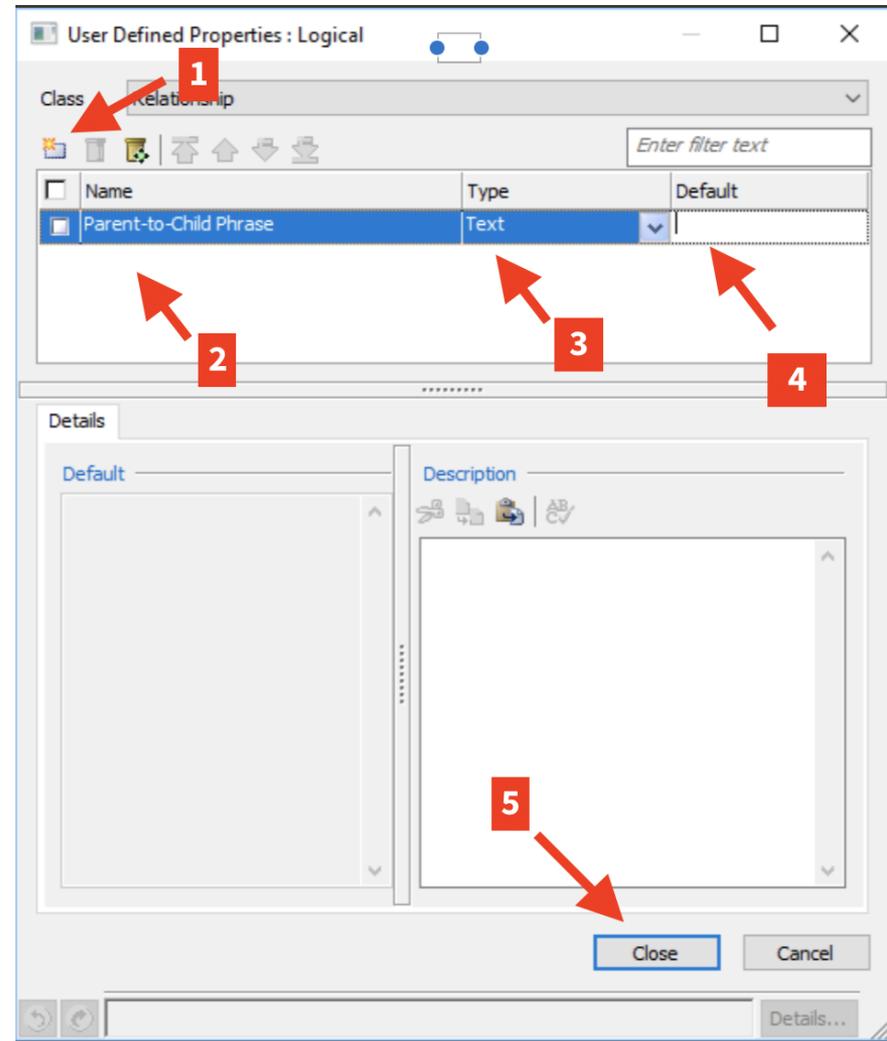
- From erwin's **Model Explorer**, expand the **Entities** tree, select the appropriate **Entity**, expand the **Attributes** tree, right-click the appropriate **Attribute**, and select **Properties**.
- Open the **UDP** tab in the resulting window.
- Select the UDP created in the previous steps and add the appropriate value.
- Select the **Close** button.



# Creating Relationship-Level UDPs (1 of 2)

After following the steps in the **Starting Point** slide:

- Select the **Relationship** class.
- Click the **New** button.
- Provide Name, Type, and (optional) Default values.
- Click the **Close** button.



# Creating Relationship-Level UDPs (2 of 2)

- From erwin's **Model Explorer**, expand the **Relationships** tree, right-click the appropriate **Relationship**, and select **Properties**.
- Open the **UDP** tab in the resulting window.
- Select the UDP created in the previous steps and add the appropriate value.
- Select the **Close** button.

