

erwin Data Intelligence Suite

Resource Management Guide

Release v10.2

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Managing Resources

This section walks you through managing resources in the Resource Manager.

The Resource Manager is key to data governance where you do the following:

- Create roles and users
- Assign roles to users for the access level permissions
- Assign technical and business assets to users and roles in bulk
- View access rights
- Create roles group based on governance responsibilities
- View governance responsibilities report
- Create profiles to set up user-specific mapping grid views in the Mapping Manager and code value grid views in the Codeset Manager

The application has a default Administrator user, Administrator role, and a Default profile which you cannot edit or delete. For further information on accessing and using the Resource Manager, refer to the <u>Using Resource Manager</u> topic.

Using Resource Manager

To access the Resource Manager, go to **Application Menu > Data Catalog > Resource Manager**. The Resource Manager dashboard appears:

DATA INTELLIGENCE SUITE	Resource Man	nager				0 🖩 8
Users R	oles	Profiles Governa	nce Responsibilities	Access Rights Report		1
Settings 2	User Details	User Account Activities	User Assignments	Access Rights		3
Users AD Administrator AD Administrator - Default System Us esimpson ES esimpson Jak Jadams Jaey Adams	User Type User ID User Full Name Password Mobile Company Title	Database Administrator Administrator - Default 	System User	Telephone Number Email ID Alternate Telephone Number Manager Name Company Created Date Time	9999999999 abc@abc.com 9999999999 erwin, Inc. 10/2/29/2020 03:48:28 0/2/29/2020 03:48:28	
John Doe John Doe JW jivilson JW joey Wilson	Default Role Created By Last Modified By Landing Module User Image	System System Mapping Manager		Last Modified Date Time Theme Language Preference	arwin English	
ksridhar						•

UI Sec- tion	Function
1-Utility	Use this pane to navigate through Users, Roles, Profiles, Governance Respons-
Pane	ibilities, and Access Rights Report.
2-Browser	Based on your selection in the utility pane, use this pane to browse through
Pane	users list, roles list, profiles, and roles group.
3-Right	Use this pane to view or work on the data displayed based on your selection in
Pane	the browser pane.

Managing resources involves the following:

- Creating and managing roles
- Creating and managing users
- Creating and managing profiles
- Viewing access rights report
- Configuring governance responsibilities

Creating Roles

Use roles to assign access-level permissions to users. While few roles are available by default in erwin DI Suite, you can create custom roles.



The Administrator role is system-generated and you cannot edit or delete it.

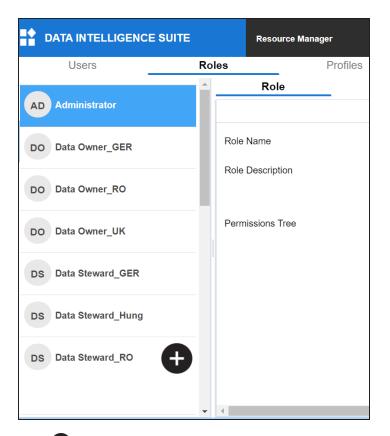
To create roles, follow these steps:

1. Go to Application Menu > Data Catalog > Resource Manager.

The Resource Manager page appears. By default the Users tab opens.

DATA INTELLIGENCE SUITE	Resource Man	ager			
Users	Roles	Profiles	Governanc	ce Responsibilities	Access Rights Report
Settings	User Details	User Accou	unt Activities	User Assignments	Access Rights
Users	User Type User ID	Databa Admini			Telephone Number Email ID
Administrator Administrator - Default System Us	Lloor Full Nome	Admini	strator - Default Sy	stem User	Alternate Telephone Number
ES Erica Simpson	Password Mobile	999999			Manager Name Company

2. Click the Roles tab.



3. Click •.

The Role page appears.

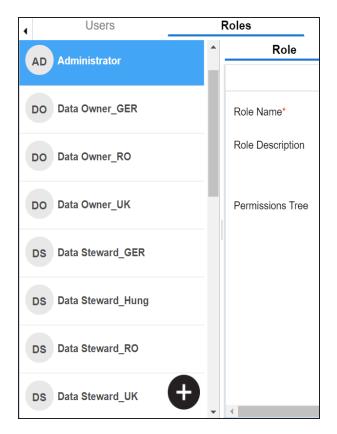
Role		
	Save	el
Role Name*	Note: Role Name once created cannot be edited	4
Role Description		1
		-
Permissions Tree	Permissions	
	Resource Manager	
	Metadata Manager	1
	Mapping Manager	
	Codeset Manager	
	Release Manager	
	Reference Data Manager	
	Code Automation Template	
•	>	

4. Enter the Role Name and Role Description.

For example:

- Role Name: Data Steward_UK
- Role Description: The role has access to the Resource Manager and Mapping Manager.
- 5. Under the **Permissions Tree** section, select the check box for the modules or the permission object to which you want to grant access to the role.
- 6. Click Save.

A role is created and added to the Roles list.



Once a role is created, you can:

- Assign it to users
- Configure access rights

You can also manage roles by using the options available on clicking the role. <u>Managing</u> roles involves:

- Editing roles
- Deleting roles
- Cloning roles

Configuring Access Rights

You can configure role access rights and assign assets to roles. Assets here refer to the environments in Metadata Manager, projects in Mapping Manager, and catalogs in Business Glossary Manager.

To configure access rights, follow these steps:

1. On the **Roles** tab, click a role.

By default, the Role tab opens.

	Users	Ro	les	Profiles	Governance Responsibilities	Access Rights Re	eport	
AD	Administrator	•	Role	Acc	ess Rights	(Edit Del	ete Clone Role
DO	Data Owner_GER	I	Role Name		Data Owner_RO			
DO	Data Owner_RO		Role Description		This role is accountable for who has access to info functional areas for Romania. It may decide to revi request individually or may define a set of rules tha access based on business function, support role, e	ew and authorize each access t determine who is eligible for	•	
DO	Data Owner_UK		Permissions Tree		4 V 😫 Permissions			
DS	Data Steward_GER				 Resource Manager Metadata Manager 			
					🕨 🗹 📲 Mapping Manager			

2. Click the Access Rights tab.

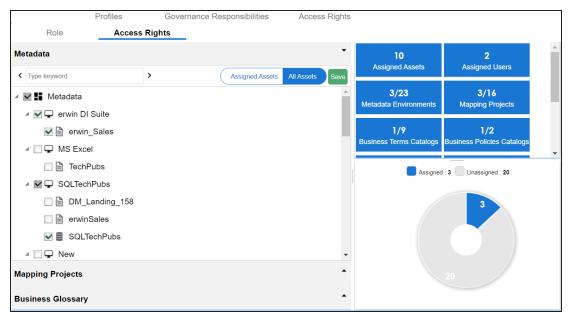
By default, the Metadata pane appears. It displays the environments assigned to the role.

	•	10 Assigned Assets	2 Assigned Users	Í	
Assigned Assets	All Assets	3/23 Metadata Environments	3/16 Mapping Projects		
		1/9 Business Terms Catalogs	1/2 Business Policies Catalogs		
		Assigned : 3 Unassigned : 20			
		3			
Mapping Projects 20					
	Assigned Assets	Assigned Assets All Assets	Assigned Assets Assigned Assets 3/23 Metadata Environments 1/9 Business Terms Catalogs	10 2 Assigned Assets Assigned Users 3/23 3/16 Metadata Environments Mapping Projects 1/9 1/2 Business Terms Catalogs Business Policies Catalogs	

3. Click the required pane and switch Assigned Assets All Assets

For example, if you switch to All Assets in the Metadata pane, all the environments appear.

to All Assets.



4. Select the required assets.

5. Click Save.

The selected assets are assigned to the role.

After, assigning assets to roles, you can view a summary of role assignments with the help of infographics.

Viewing Infographics

The Access Rights tab displays metrics that help you analyze and track role assignments. It presents this information using statistical boards, charts, or graphs.

Statistical Boards

The following statistical boards display metrics about role assignments:

10	2	3/23
Assigned Assets	Assigned Users	Metadata Environments
3/16	1/9	1/2
Mapping Projects	Business Terms Catalogs	Business Policies Catalogs
1/2 Business Rules Catalogs		

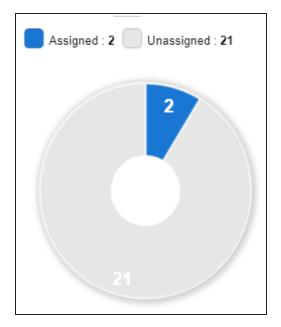
- Assigned Assets: It displays the total number of assigned assets to the role. This
 includes all the environments, projects, and catalogs assigned to the role.
- Assigned Users: It displays the number of user assigned to the role.
- Metadata Environments: It displays the number of environments in the Metadata Manager assigned to the role.
- Mapping Projects: It displays the number of projects in the Mapping Manager assigned to the role.
- Business Terms Catalogs: It displays the number of business terms catalogs in the Business Glossary Manager assigned to the role.

- Business Policies Catalogs: It displays the number of business policies catalogs in the Business Glossary Manager assigned to the role.
- Business Rules Catalogs: It displays the number of business rules catalogs in the Business Glossary Manager assigned to the role.

Metadata

In the Metadata pane, the pie-chart displays the number of assigned and unassigned environments to the role. The blue colored slice corresponds to the assigned environments.

For example, the following pie-chart displays two assigned environments and twenty-one unassigned environments.

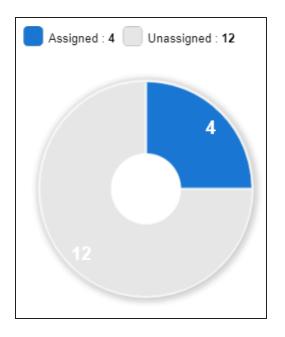


Mapping Projects

In the Mapping Projects pane, the pie-chart displays the number of assigned and unassigned projects to the role.

The blue colored slice corresponds to the assigned projects.

For example, the following chart displays four assigned projects and twelve unassigned projects.

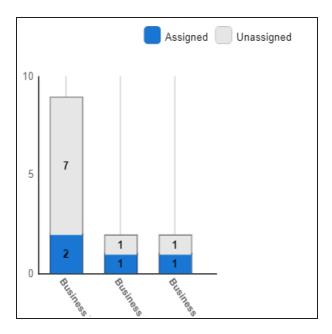


Business Glossary

In the Business Glossary pane, the bar graph displays the number of assigned and unassigned catalogs of each type.

The blue colored segment of the bar corresponds to assigned catalogs.

For example, the following bar graph displays two assigned business terms catalogs and seven unassigned business terms catalogs.



Managing Roles

Managing Roles involves:

- Editing or deleting Roles
- Cloning Roles

To manage Roles, follow these steps:

1. On the **Roles** tab, click a role.

By default, the Role tab opens.

Users	Roles	Profiles	Governance Responsibilities	Access
	Role	Ace	cess Rights	
AD Administrator			Edit Delete	Clone Role
DO Data Owner_GER	Role Name		Data Owner_GER	
DO Data Owner_RO	Role Description	1	This role is accountable for who has access to info functional areas for Germany area. It may decide to access request individually or may define a set of r for access based on business function, support role	o review and au ules that detern

2. Use the following options on the Role tab:

Edit

Use this option to update roles. You can update the Permission Tree and Role Description.



You cannot edit the Role Name.

Delete

Use this option to delete a role that is no longer required.

Clone Role

Use this option to clone a role. The cloned role can have different role name and description.

Creating Users and Assigning Roles

Users are used to grant members of your team access to erwin DI Suite and your projects. While a few users are available by default, you can create users for your organization using the Resource Manager. While you create users, you also assign them roles to define their access-level permissions.

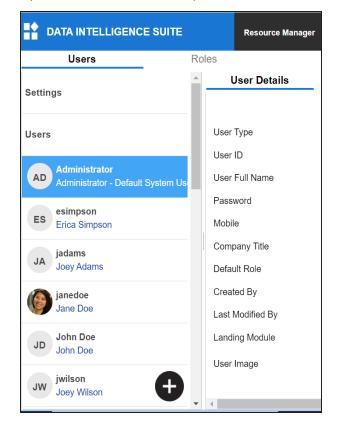


The Administrator user is available by default and you cannot edit or delete this user.

To create users, follow these steps:

1. Go to Application Menu > Data Catalog > Resource Manager.

By default, the Users tab opens.



2. Click **•**.

The New User page appears.

New User					
					Ľ ×
User Type	Database	~	Telephone Number		
User ID*			Email ID*		
User Full Name*			Alternate Telephone Number		
Password*			Manager Name		
Mobile			Company		
Company Title			Send Email		
Default Role			Theme	erwin (Web Blue)	1
Landing Module	Mapping Manager	~	Language Preference	English	•
User Roles*			User Image		
Available Roles	Assigned F	loles			
Administrator Data Owner_GER Data Owner_RO Data Owner_UK Data Steward_GER	↓				

3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description				
	Specifies whether the user type is Database, LDAP (Lightweight Directory Access Protocol), SAML (Security Assertion Markup Language), or NON LOGIN. For example, Database.				
Lisor Tupo	 Database: Select this option if the user authentication is through the credentials created in the Resource Manager. 				
User Type	 LDAP: Select this option if the user authentication is through a dir- ectory server, such as MS Active Directory, OpenLDAP or OpenDJ. 				
	 SAML: Select this option if the user authentication is through SAML attributes. 				
	 NON LOGIN: Select this option if the user is not required to log on to the application. 				
User ID	Specifies the user name of the user to log on to erwin DI Suite.				

Field Name	Description
	For example, Imichal.
User Full	Specifies the user's full name.
Name	For example, Luqman Michal.
	Specifies the password to log on to erwin DI Suite.
	For example, Luqman@1.
Password	The administrator provides a default password, which can be changed
	later. The administrator can also enforce a password policy. For more
	information on enforcing password policy, refer to the <u>Configuring Set</u> - tings topic.
	Specifies the user's valid mobile number.
Mobile	For example, +658374414288.
Company	Specifies the user's company title or designation.
Title	For example, Data Administrator.
Default	Specifies the default role of the user.
Role	For example, Data Steward_RO.
Loughing.	Specifies the landing module for the user.
Landing Module	For example, Mapping Manager.
Woulle	The Landing Module is the first page displayed when a user logs in.
	Select roles under Available Roles list-box and move them to Assigned
	Roles list-box using the arrows (➡ or 榊). Similarly, to change existing
	role assignment, select roles under Assigned Roles list-box and move
	them back to Available Roles list-box using the arrows (裲 or 🗮).
User Roles	For adding a new role under the Available Roles list-box, refer to the <u>Creating Roles</u> topic.
	You can assign the Legacy Data Steward role to a user. This enables you to assign this user as a Data Steward in the Metadata Manager and Refer-
	ence Data Manager.
Telephone	Specifies the valid telephone number of the user.

Field Name	Description
Number	For example, 1-800-783-7946.
Email ID	Specifies the user's email address.
Email ID	For example, l.michal@mauris.edu
Alternate Telephone	Specifies the user's valid alternate telephone number.
Number	For example, 1-802-456-7946.
Manager	Specifies the name of the user's reporting manager.
Name	For example, John Doe.
Compony	Specifies the name of the user's company.
Company	For example, ABC Consulting Services.
	Specifies whether to send email to the user's email ID.
Send Email	Select the Send Email check box to send an email notification to the user's email ID. For more information on configuring notifications, refer to the
	Configuring Notifications topic.
Theme	Specifies the theme for the user to set the appearance of erwin DI Suite.
ineme	By default, it is set to erwin (Web Blue).
	Specifies the language preferred by the user.
Language	For example, English.
Preference	For more information on language settings, refer to the Configuring Lan-
	guage Settings topic.
	Specifies the physical image file being attached to the user.
	Drag and drop a user's image file or click 😑 to select and upload the
	image file.

4. Click

A new user is created and added to the Users list.

Once a user is created, you can <u>configure its access rights</u> with respect to the assets in the Metadata Manager, Mapping Manager, and Business Glossary Manager. After assigning

users to projects and mappings, you can view the user activity report and mapping assignments on the <u>User Assignments</u> tab.

You can also manage a user by using the options available on clicking the user. <u>Managing</u><u>users</u> involves:

- Editing
- Deleting
- Viewing user account activities
- Viewing users activity history

Configuring Access Rights

You can configure user access rights and assign assets to users. Assets here refer to the environments in Metadata Manager, projects in Mapping Manager, and catalogs in Business Glossary Manager.

To configure access rights, follow these steps:

1. On the **Users** tab, click a user.

User Details	User Account Activities	Jser Assignments	Access Rights	
User Type User ID	Database		Telephone Number Email ID	jane.doe@edufirm.com
User Full Name	Jane Doe		Alternate Telephone Number	
Password Mobile	····		Manager Name Company	K.Sridhar
Company Title Default Role	Mapping Designer		Created Date Time Last Modified Date Time	08/07/2020 07:27:45 09/29/2020 10:08:56
Created By	Administrator		Theme	erwin
Last Modified By Landing Module	Administrator Mapping Manager		Language Preference	English
User Image				
Role Name		Role Descr	iption	

By default, the User Details tab opens.

2. Click the Access Rights tab.

By default, the Metadata pane appears. It displays the environment assigned to the role.

Roles	Profiles	Governance Respons	ibilities	Access Rights Report		
User Details	User Account Activities	User Assignments	Access F	Rights		
Metadata			•	7 Assigned Assets	1 Assigned Roles	•
< Type keyword	>	Assigned Assets	All Assets			
🔺 📲 Metadata				3/23 Metadata Environments	3/16 Mapping Projects	
a 🖵 erwin DI Suite						
erwin_Sale				1/9 Business Terms Catalogs	0/2 Business Policies Catalogs	
SQLTechPubs				Businoss forms outdogs		-
erwinSales				Assigne	ed : 3 Unassigned : 20	
🔺 🖵 New						
E FlatFileEnv					3	
Mapping Projects			•			
Business Glossary			•			

3. Click the required pane and switch Assigned Assets All Assets to All Assets.

For example, if you switch to All Assets in the Metadata pane, all the environments appear.

Metadata				•
< Type keyword	`	Assigned Assets	All Assets	Save
🔺 🕶 💵 Metadata				
🔺 🔲 🖵 erwin DI Suite				
🔲 📔 erwin_Sales				
🔺 📃 🖵 MS Excel				
TechPubs				- 1
🛛 🗹 🖵 SQLTechPubs				
🔲 🗎 DM_Landing_158				
🗹 📔 erwinSales				
SQLTechPubs				
🔺 🔲 🖵 New				
FlatFileEnv				
🔺 🗹 🖵 erwin DM				
DNL anding				•
Mapping Projects				•
Business Glossary				•

- 4. Select the required assets.
- 5. Click Save.

The selected assets are assigned to the user.

After, assigning assets to roles, you can view a summary of user assignments with the help of infographics.

Viewing Infographics

The Access Rights tab displays metrics that help you analyze and track user assignments. It presents this information using statistical boards, charts, or graphs.

Statistical Boards

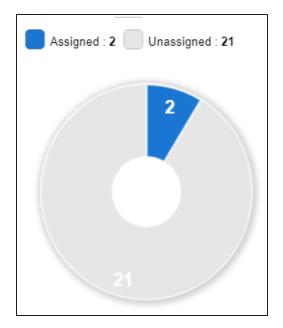
The following statistical boards display metrics about user assignments:

10	1
Assigned Assets	Assigned Roles
2/23	4/16
Metadata Environments	Mapping Projects
2/9	1/2
Business Terms Catalogs	Business Policies Catalogs
1/2	0/0
Business Rules Catalogs	DM NSM Files Catalogs

- Assigned Assets: It displays the total number of assigned assets. This includes all the environments, projects, and catalogs assigned to the user.
- Assigned Roles: It displays the number of roles assigned to the user.
- Metadata Environments: It displays the number of environments in the Metadata Manager assigned to the user.
- Mapping Projects: It displays the number of projects in the Mapping Manager assigned to the user.
- Business Terms Catalogs: It displays the number of business terms catalogs in the Business Glossary Manager assigned to the user.
- Business Policies Catalogs: It displays the number of business policies catalogs in the Business Glossary Manager assigned to the user.
- Business Rules Catalogs: It displays the number of business rules catalogs in the Business Glossary Manager assigned to the user.

Metadata

In the Metadata pane, the pie-chart displays the number of assigned and unassigned environments to the user. The blue colored slice corresponds to the assigned environments. For example, the following pie-chart displays two assigned environments and twenty-one unassigned environments.

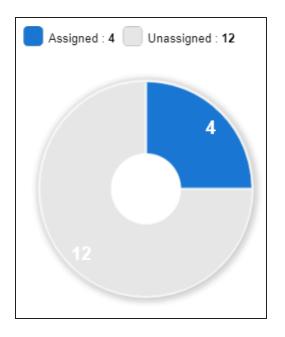


Mapping Projects

In the Mapping Projects pane, the pie-chart displays the number of assigned and unassigned projects to the user.

The blue colored slice corresponds to the assigned projects.

For example, the following chart displays four assigned projects and twelve unassigned projects.

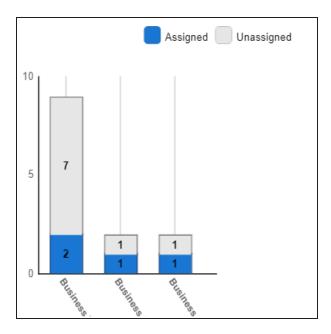


Business Glossary

In the Business Glossary pane, the bar graph displays the number of assigned and unassigned catalogs of each type.

The blue colored segment of the bar corresponds to assigned catalogs.

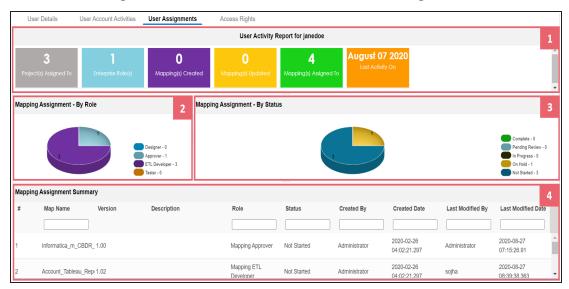
For example, the following bar graph displays two assigned business terms catalogs and seven unassigned business terms catalogs.



Viewing User Assignments

The User Assignments tab displays metrics that help you analyze and track user assignments with respect to the Mapping Manager. It presents this information using statistical boards, charts, and grid.

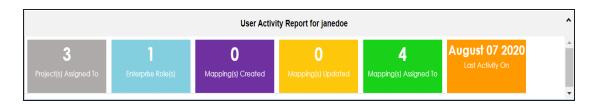
To view user assignments, on the Users tab, click the User Assignments tab.



UI Section	Function
1-User Activity Report	It displays a snapshot of statistics related to the user activities.
2-Mapping Assignment - By	It displays information about the mapping assignment based on
Role	roles.
3-Mapping Assignment - By	It displays information about the mapping assignment based on
<u>Status</u>	their statuses.
4- <u>Mapping Assignment</u> Summary	It displays a list of maps assigned to the user.

User Activity Report

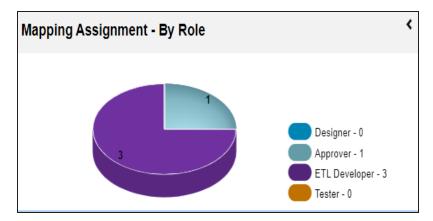
The User Activity Report pane displays the following statistical boards:



- Project(s) Assigned To: It displays the number of mapping projects assigned to the user.
- Enterprise Roles: It displays the number of roles assigned to the user.
- Mappings Created: It displays the number of maps created by the user.
- Mappings Updated: It displays the number of maps updated by the user.
- Mapping(s) Assigned To: It displays the number of mappings assigned to the user
- Last Activity On: It displays the date and time of last activity of the user.

Mapping Assignment - By Role

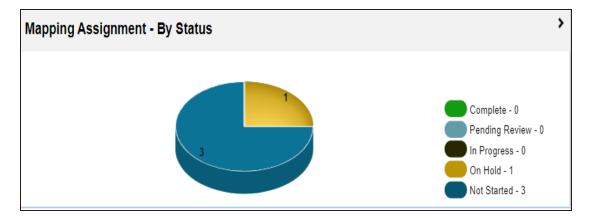
The Mapping Assignment - By Role pane displays the number of mappings based on the user's role in a pie-chart.



Each slice of the pie-chart corresponds to a role. To view detailed information about mapping assignment, click a slice. The Mapping Assignment Summary pane displays the map names based on the role.

Mapping Assignment - By Status

The Mapping Assignment - By Status pane displays number of mappings based on the status in a pie-chart.



Each slice corresponds to a status. To view detailed information about the mapping assignment, click a slice. The Mapping Assignment Summary pane displays the map names based on the status.

Mapping Assignment Summary

By default, the Mapping Assignment Summary pane displays all the maps assigned to the user in the grid format.

Mappi	Mapping Assignment Summary								
#	Map Name	Version	Description	Role	Status	Created By	Created Date	Last Modified By	Last Modified Date
1	Informatica_m_C	BI 1.00		Mapping Approve	r Not Started	Administrator	2020-02-26 04:02:21.297	Administrator	2020-08-27 07:15:26.91
2	Account_Tableau	_I 1.02		Mapping ETL Developer	Not Started	Administrator	2020-02-26 04:02:21.297	sojha	2020-08-27 08:39:38.363
3	TechPubs	1.00		Mapping ETL Developer	On Hold	Administrator	2020-05-23 18:51:12.91	Administrator	2020-08-27 06:50:59.303

You can click a slice in the above pie-charts to view the mapping assignment in the grid. It includes map name, roles of the user, and status of the maps.

Configuring Password Settings

You can configure password settings to enforce a password policy that sets the minimum complexity requirements for user passwords. The set of rules in the password policy makes the passwords strong. You can also set maximum number of invalid logs in attempts to lock users.

To configure password settings, follow these steps:

1. On the Users tab, click the Settings section.

By default, the Configurations tab opens.

Users	Roles		Profiles	Governance Responsibilities Access R	ights R
Settings	^	Configurations	-		
Users		Enforce Passv Note: While this option meet the minimum co	on is enabled, the p	password entered for every login user would have to	61
AD Administrator Administrator - Default System Us	51	Users should enter p 1. Password is at lea	asswords that meet ast 8 characters long	t the following criteria:	
ES esimpson Erica Simpson			mpts to Lock User		
JA jadams Joey Adams		No Of invalid Login	Attempts Permitte	5 Enter a Numeric Value Between 1 to 100	

- 2. Click 🖉.
- 3. Use the following options:

Enforce Password Policy

Use this option to enforce the password policy.

Maximum attempts to Lock User

Use this option to turn on the **No Of invalid Login Attempts Permitted** field. **No of invalid Login Attempts Permitted**: Use this option to set the maximum number of invalid logs in attempts. For example, if you set it to 5, the user gets locked after attempting 5 number of invalid logs in attempts. You can enable the locked user by using the options available under the Users section. For more information on enabling users, refer to the <u>Managing Users</u> topic.

Managing Users

Managing users involves:

- Editing or deleting users
- Monitoring user account activities
- Viewing users activity history

Editing or Deleting

To edit or delete users, follow these steps:

1. On the Users tab, click a user.

By default, the User Details tab opens.

Roles	Profiles	Governance R	Responsibilities	Access Rights		
User Details	User Account Activities	User Assignments	Access Rights			
					Ø 🗎	*
User Type	Database		Telephone Number			
User ID	esimpson		Email ID	e.simpson@xyz.com		
User Full Name	Erica Simpson		Alternate Telephone N	lumber		
Password			Manager Name			

2. Use the following options:

Edit User (🖉)

Use this option to update user details and assign new roles to the user.

You cannot edit the User Type, User ID and the Default Role.

Delete User (🛅)

Use this option to delete a user that is no longer required.

Monitoring User Account Activities

To monitor user account activities, follow these steps:

1. In the browser pane, click the **Users** section.

By default, the User Account Activities tab opens. It displays the account activities of all the users.

	Users Ro		Profi	les Gov	/ernance	Responsibilities	Access Rights				
Settin	20	 User Account Activities 		Users Activity	Users Activity History						
Setting	octangs		From Date	To Date		€ *		Enable User	Disable User Exp	port to Excel Notify	Logout [1]
Users		#	User Id	Account Status	Login Status	IP Address	Browser	Last Log-In	Log-Out	Session Duration (HH:MM:SS)	
AD	Administrator Administrator - Default System Use										
ES	esimpson Erica Simpson		1 Administrator	ENABLED	•	183.83.135.30	Chrome 8 86.0.4240.75	10/13/2020 05:13:23		00:15:51	
JA	jadams Joey Adams	-	2 sojha	ENABLED	•	183.83.135.30	Chrome 8 86.0.4240.75	10/13/2020 04:59:51	10/13/2020 05:13:12	00:13:21	
6	janedoe Jane Doe	:	3 ksridhar	ENABLED	•	183.83.135.30	Chrome 8 86.0.4240.75	10/08/2020 09:27:54	10/08/2020 09:29:15	00:01:21	

2. Use the following options:

Enable User

Use this option to enable locked and disabled users. To enable users, select the required rows in the grid and click Enable User.

Disable User

Use this option to disable users. To disable users, select the required rows in the grid and click Disable User.

Export to Excel

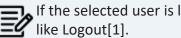
Use this option to download the user's account activities in the XLS format.

Notify

Use this option to send email notifications to users.

Logout

Use this option to log out the user.



If the selected user is logged in then the Logout button appears

You can filter the content in the grid based on the From Date and To Date. To filter the content, set dates in the From Date and To Date and then click $igodoldsymbol{\mathbb{R}}$.

To clear the search results, click 🚿.

You can monitor account activities of an individual user. To monitor account activities of users individually, on the **Users** tab, click a user and then click the **User Account Activities** tab. Refer to the above descriptions for the available options on the User Account Activities tab.

Users	Role	es	Profiles	Governance	e Responsibilities	Access Rights			
-		User Details	User Accou	nt Activities	User Assignments	Access Rights			
JD John Doe John Doe		From Date	To Date		€ *		Delete Export to	Excel Notify	Logout [0]
JW jwilson Joey Wilson		# IP /	Address	В	rowser	Last Log-In	Log-Out	Session Duration (HH:MM:SS)	
KS ksridhar Kartik Sridhar									
LM Imichal Luqman Michal		1 183.8	33.135.30	Chrome 8 86.0	.4240.75	10/08/2020 09:27:54	10/08/2020 09:29:15	00:01:21	

Viewing Users Activity History

To view users activity history, follow these steps:

1. In the browser pane, click the **Users** section.

	Users	Roles	Prof	iles Gov	ernance f	Responsibilities	Access Rights					
Setting		Us	er Account Activities	Users Activity	History							
Setting	ectingo		om Date	To Date	(€ &		Enable User	Disable User Expo	ort to Excel Notify	Logout [1]	
Users		#	User Id	Account Status	Login Status	IP Address	Browser	Last Log-In	Log-Out	Session Duration (HH:MM:SS)		
AD	Administrator Administrator - Default System Use											
ES	esimpson Erica Simpson	1	Administrator	ENABLED	•	183.83.135.30	Chrome 8 86.0.4240.75	10/13/2020 05:13:23		00:15:51		Î
JA	jadams Joey Adams	2	sojha	ENABLED	•	183.83.135.30	Chrome 8 86.0.4240.75	10/13/2020 04:59:51	10/13/2020 05:13:12	00:13:21		
6	janedoe Jane Doe	3	ksridhar	ENABLED	•	183.83.135.30	Chrome 8 86.0.4240.75	10/08/2020 09:27:54	10/08/2020 09:29:15	00:01:21		

2. Click the Users Activity History tab.

It displays the complete history of users activity.

	Profiles G		Governance Responsibilities	Access	s Rights				
U	ser Account Act	ivities Users Activ	vity History						
Fro	om Date	To Date	۵					Export to Exc	cel
#	User Id	Full Name	Role(s)	Action Type	IP Address	Browser	Action By	Action Date	
1	Imichal	Luqman Michal	ETL Developer	ACCOUNT ENABLED	183.83.135.30	Chrome 8(86.0.4240.75)	Administrator	10/13/2020 05:42:48	^
2	ksridhar	Kartik Sridhar	Data Owner_RO	ACCOUNT ENABLED	183.83.135.30	Chrome 8(86.0.4240.75)	Administrator	10/13/2020 05:42:48	
3	sojha	Saras Ojha	Mapping Admin	ACCOUNT ENABLED	183.83.135.30	Chrome 8(86.0.4240.75)	Administrator	10/13/2020 05:42:48	

You can filter the content in the grid based on the From Date and To Date. To filter the content, set dates in the **From Date** and **To Date** and then click $\textcircled{\blacksquare}$.

To clear the search results, click 🚿.

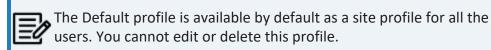
Creating Profiles

Profiles help users to personalize:

- Mapping Specification grid in the Mapping Manager.
- Code Value Grid in the Codeset Manager.

You can create two types of profiles:

Site Profiles: You can create a profile for other users by creating a site profile. Ensure
that you specify the users who can access the site profile.



 User Profiles: You can create a profile for yourself. A user profile created by you cannot be accessed by other users.

To create profiles, follow these steps:

1. Go to Application Menu > Data Catalog > Resource Manager.

By default, the Users tab opens.

DATA INTELLIGENCE SUITE	Resource Ma	nager				
Users	Roles	Profiles	Governanc	e Responsibilities	Access Rights Report	
Settings	User Details	User A	account Activities	User Assignments	Access Rights	
Users	User Type	C	Database		Telephone Number	
	User ID	А	Administrator		Email ID	
AD Administrator Administrator - Default System U	User Full Name	Α	Administrator - Default Sys	stem User	Alternate Telephone Number	
	Password	•			Manager Name	
ES esimpson Erica Simpson	Mobile	9	9999999999		Company	

2. Click the Profiles tab.

	TE	Resource Manager		
Users	Role	es Profiles	Governance Responsibilities	Access Rights Report
Profiles	<	Profile Details		
Profiles Default		S.No Profile Name	Profile Type	Created By
		1 <u>Default</u>	Site	Administrator

3. Right-click the **Profiles** node.

DATA INTELLIGENCE SUITE			Resou	irce Manager	
Users	Ro	les		Profiles	
Profiles	<	Profile	e Detai	ils	
Profiles Default New Profile		S.No	Profi	ile Name	
		1	<u>Defau</u>	<u>ilt</u>	

4. Click New Profile

The New Profile page appears.

lew Profile		_ 🗆 :
		Ľ ×
Profile Name *		
Description	🛯 🛕 🗄 🛛 B J 🖳 📰 🚍 🗮 🗐 🗄 🗄 🖆 🖌	
		•
D (1 T		
Profile Type	User Override User List None	*
Profile Type	 Override User List Override User List All Users Administrator esimpson jadams janedoe John Doe jwilson ksridhar Imichal 	*

5. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description					
Profile	Specifies the unique name of the profile.					
Name	For example, Mapping_Admin_Profile.					
Description	Specifies the description about the profile.					
Description	or example: This is a site profile for mapping administrators.					
	Specifies type of the profile.					
Profile	 To create the profile for yourself, select User. 					
Туре	 To create profile for other users, select Site and select appropriate users from the Override User List. 					

6. Click

A profile is created and added to the Profiles tree.

Users	Ro	les	Profiles
Profiles	<	Profile	Details
Profiles		S.No	Profile Name
Default			
Mapping_Admin_Profile		1	Default
Mapping_Designer_Profile		2	Mapping_Admin_Profile
		3	Mapping_Designer_Profile

Once the profile is created, you can set the following for the profile:

- Mapping Specification grid in the Mapping Manager
- Code Value Grid in the Codeset Manager

You can also manage profiles. It involves editing or deleting profiles. For more information on managing profiles, refer to the <u>Managing Profiles</u> topic.

Setting Mapping Specification Grids

You can set the Mapping Specification grid for a profile with respect to:

- Column order
- Column visibility
- Header Menu

You can also define the project scope of the profile.

To set Mapping Specification grids, follow these steps:

1. In the **Profiles** pane, click a profile.

By default, the Overview tab opens.

Users	Roles	Profiles	Governance Responsibilities	Access Rights Report	
Profiles	< Overview	Mapping Manager	Codeset Manager		
Profiles					61°
Default					_
Mapping_Admin_Profile	Profile Name *	Mapping_Admin_Profile			
Mapping_Designer_Profile	Description	This profile is for the A	dministrator.		

2. Click the Mapping Manager tab.

	Profiles	Governance Responsibilities	s Access F	Rights Report					
• Overvie	w Mapping Manage	Codeset Manager							
Project Scope	None All Projects ABC Digital/Adoption ervinDIS Lineage Demo Project project Tech Pubs	Ĵ			Ď				
- Mapping Grid -	14								
# Targe Name	t System Target Environment Name	Target Table Target Name Column Nan	Target ne Column Data Type		Target Column Precision	Target Column Scale	Target Column Nullable Flag	Target Column ETL Default Value	T C E
4									Þ
All Mapping	ābs	Move to Top							
Map Spec Ove Source Extract Target Update Testing Notes Map Document	SQL Strategy	Mapping Specification Graphical Designer Test Specification Workflow Log							

3. Click 🖉.

4. Use the following options:

Project Scope

Use this option to specify the projects to which the profile can be used. For example, if the project scope is **All Projects** then the profile can be used to view all the projects in the Mapping Manager. To select multiple projects, use the Ctrl key.

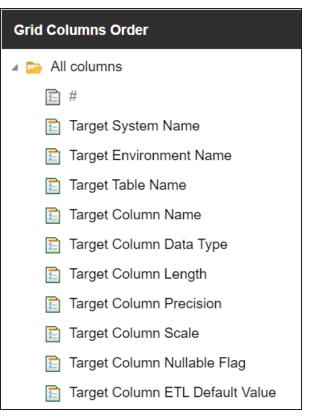
Mapping Grid

Use the following options under this section to set the columns and header menu:

Change Column Order (11)

Use this option to set the columns order.

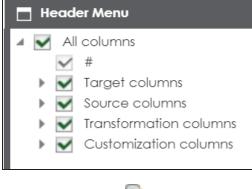
To change the column order, click **1**. The Grid Columns Order page appears.



Drag and drop the columns in the required order.

Header Menu (I)

Use this option to set the columns visible in the header menu. To set the columns visible, click \blacksquare and select the required columns.



Reset C	olumn	Ordering	(💷)
---------	-------	----------	-----

Use this option to reset the column order.

Reset Column Visibility (루)

Use this option to reset the column visibility.

Move to Top

The mapping tabs present in **Move to Top** box appears on top of the mapping grid.

To move mapping tabs from **All Mapping Tabs** to **Move to Top** box, use ($\stackrel{>}{\Rightarrow}$ or $\stackrel{\Rightarrow}{\Rightarrow}$).

To move mapping tabs from **Move to Top** box to **All Mapping Tabs** box, use (\leftarrow or \leftarrow).

5. Click 💾.

The Mapping Specification grid is set for the profile.

The user can choose a profile in the Mapping Manager to view the Mapping Specification grid.

₁ Ma	pping Specifica	tion Graphical	Designer Test	Specification	Workflow Log						•
<u>i</u>	APPEND 077	🎅 [Data Integra	ation]				Profiles:	Mapping_Designer_Profil -	🌣 👯 🛛) 🖬 🐻 😣 <	
#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Target Column Data Type	Target Column Length	Target Column Precision	Site Profiles : Mapping_Designer_Profile User Profiles :	get umn lable Flag	Target Column ETL Default Value	Ti C D
1	SQLTechPubs	SQLTechPubs	dbo.Customers	CustomerID	nchar	5	0	Mapping_Admin_Profile			•
2	TABLEUAU	PRESENTATION LAYER	Account	Acct Cod Ccy							

Setting Code Value Grids

You can set Code Value Grid for a profile with respect to:

- Header menu
- Column order
- Column visibility

To set Code Value Grids, follow these steps:

1. In the **Profiles** pane, click a profile.

By default, the Overview tab opens.

	Users	Roles	Profiles	Governance Responsibilities	Access Rights Report		
Profile	s	< Overview	Mapping Manager	Codeset Manager			
4 1	Profiles					L)	
	Default					_	
	Mapping_Admin_Profile	Profile Name *	Mapping_Admin_Profile				
	Mapping_Designer_Profile	Description	This profile is for the A	dministrator.			

2. Click the Codeset Manager tab.

		Profiles	Governance R	esponsibilities	Access Rights Re	eport			
 Ove 	rview	Mapping Manager	Codeset Mana	ger					
Code Valu	e Grid								
2 🗟 🛛	e 1	1							
Code Nam	ne Co	de Value Code I	Description	Codeset Name	System Name/Environment		Extended Properties	Start Date	End Date

- 3. Click 🜌.
- 4. Use the following options:

Header Menu (**E**)

Use this option to set the column visibility in the header menu.

To set the column visiblity, click 🔳 and select the required columns.

🗖 Heade	er Menu
🔺 🗹 Co	olumns
\checkmark	Code Name
\checkmark	Code Value
~	Code Description
~	Codeset Name
~	System Name/Environment
\sim	Active Indicator
~	Delete Indicator
~	Extended Properties
\checkmark	Start Date
~	End Date
\checkmark	User Defined Field 1
~	User Defined Field 2
\sim	User Defined Field 3
\checkmark	User Defined Field 4
\sim	User Defined Field 5
\checkmark	User Defined Field 6
\sim	User Defined Field 7
\sim	User Defined Field 8
~	User Defined Field 9

Change Column Order (1)

Use this option to set the column order.

To set the column order, click **1** and then drag and drop the columns in the required order.

🗖 Grid C	Columns Order
🔺 🚞 Co	blumns
<u>=</u>	Code Name
<u>*</u> =	Code Value
<u>*</u> =	Code Description
1	Codeset Name
<u>*</u> =	System Name/Environment
* =	Active Indicator
1	Delete Indicat
1	Extended Properties
1	Start Date
1	End Date
1	User Defined Field 1
=	User Defined Field 2
1	User Defined Field 3
1	User Defined Field 4
1	User Defined Field 5
1	User Defined Field 6
<u>=</u>	User Defined Field 7
±=1	User Defined Field 8
<u>±</u>	User Defined Field 9

Reset Column Ordering (📭)

Use this option to reset the column order.

Reset Column Visibility (ᆕ)

Use this option to reset the column visibility.

5. Click 💾.

The Code Value Grid is set for the profile.

The user can select a profile in the Codeset Manager to view the Code Value Grid.

Code Value G	rid										
Code Name	Code Value	Code Description	Codeset	System	Active	Delete	Extended	Profiles : Start	Mapping_Designer_Profil Site Profiles :	SS (a) 🖳
			Name	Name/Environment		Indicato	Properties		Default Mapping_Designer_Profile User Profiles :		
Public	2	The code value for Public	Public				View		Mapping_Admin_Profile		

Managing Profiles

Managing Profiles involves:

- Editing
- Deleting

To edit a profile, follow these steps:

1. In the **Profiles** pane, click a profile.

The Overview tab opens.

Users	Roles	Profiles	Governance Responsibilities	Access Rights Report	
Profiles	< Overview	Mapping Manager	⁻ Codeset Manager		
Profiles					L)
Default					_
Mapping_Admin_Profile	Profile Name *	Mapping_Admin_Profile			
Mapping_Designer_Profile	Description	This profile is for the A	dministrator.		

2. Click 🖉.

You can update the profile.

3. Click 💾.

The profile is updated.

To delete profiles, in the **Profiles** pane, right-click a profile and click **Delete Profile(s)**.

Viewing Access Rights Report

The Access Rights Report tab displays the roles and users assignments. You can view these assignments in the graphical and tabular views. The graphical view displays the assigned asset types and names in a tree structure that can be expanded. Whereas the tabular view displays the assigned asset types and names in a grid format.

To view access rights, follow these steps:

1. Go to Application Menu > Data Catalog > Resource Manager.

DATA INTELLIGENCE SUITE Resource Manager Users Roles Profiles Governance Responsibilities Access Rights Report **User Details** User Account Activities User Assignments Access Rights Settings Database User Type Telephone Number Users Administrator User ID Email ID Administrator - Default System User AD User Full Name Alternate Telephone Number Password Manager Name esimpson ES 99999999999 Mobile Company Erica Simpson

By default, the Users tab opens.

2. Click the Access Rights Report tab.

Users	Roles	Profiles	Governance Responsibilities	Access Rights Report
By Roles Assignments	By Users Assignments	Graphical View Tabular View	Sh	ow Pan View Hide Pan View
ni oo Access Rights	Ales With AlesSymmetris (11)			
Access Rights	Roles With Assignm Roles Without Assig			

3. Use the following options:

By Roles Assignments/By Users Assignments

Use this option to switch between the roles and users assignments.

Graphical View/Tabular View

Use this option to switch between the graphical and tabular views.

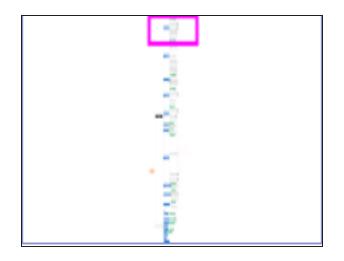
The graphical view displays the assignments in a tree structure. You can expand the tree to view the asset types and names. For example, the following graphical view displays the users assignment.

	Users With Assignments (13)	Assigned Roles (1) public	
Access Rights		public (2) Mapping Projects (2/16) Lineage Demo	
	Users Without Assignments (9)	Assigned Roles (1) Mapping Admin	
		Mapping Projects (2/16) Lineage Demo	

Use the following options on the Graphical View:

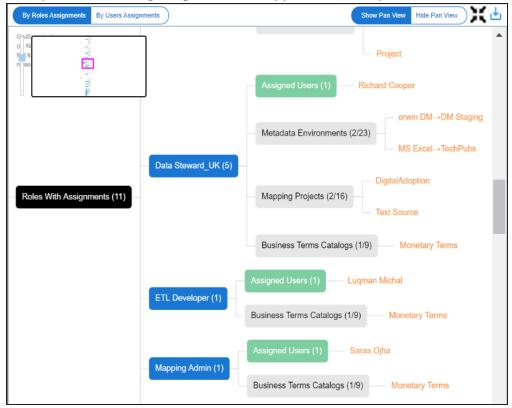
Show Pan View/Hide Pan View

Use this option to show or hide pan view. The pan view facilitates in navigating across the expanded assignment tree. To navigate across the expanded, on the **Pan View**, move the purple box.



Expand/Collapse (23)

Use this option to switch between the expanded or collapsed view. For example, the following assignment tree appears in the expanded view.



Expand Node Level

Use this option to expand the assignment tree at node level. Hover over a node and click the plus (+) icon.

Export Image (¹)

Use this option to download the assignment tree in the JPG format.

The Tabular View displays the assignment details in a grid format. For example, the following roles assignments are displayed in the grid format.

	Users	Roles	Profiles	Governance Responsibilities	Access Rights F	Report
By Ro	oles Assignments By User	s Assignments		Graphical View Tabular View		
#	Role Name		As	sset Type		Asset Name
1	Administrator		Use	ers		Administrator - Default System User
2	Data Owner_GER		Use	ers		Erica Simpson, Mike Adams
3	Data Owner_GER		Env	vironment		DM Landing(erwin DM)

You can download the assignments details in the XLSX format. To download the assignments, on the **Tabular View**, click \checkmark .

Creating Roles Group

Data governance plan in your organization may require new roles groups to accommodate governance responsibilities. You can create roles groups and group roles based on the governance responsibilities in your organization.

To create roles groups, follow these steps:

1. Go to Application Menu > Data Catalog > Resource Manager.

By default, the Users tab opens.

DATA INTELLIGENCE SUITE	Reso	urce Manager			
Users	Roles	Profiles	Governance	Responsibilities	Access Rights Report
Settings	User D	etails User Acc	count Activities	User Assignments	Access Rights
Users	User Type User ID		abase		Telephone Number Email ID
AD Administrator Administrator - Default System Us	User Full Nar		ninistrator - Default Syste	em User	Alternate Telephone Number
ES esimpson Erica Simpson	Password Mobile		9999999		Manager Name Company

2. Click the Governance Responsibilities tab.

DATA INTELLIGENCE SUITE Resource N		Resource Manager	Manager				
Users	Roles	Profiles	overnance Responsibilities	Access Rights Report			
Configure Responsibilities	Reports						
Data Stewards				·······	/ 1		
Data Owners	Name Data Stew	ards		Enabled			
Technical Data Steward	Description			Display Order			
Compliance Officer	This role is	responsible for utilizing an organiza	tion's data governance proce	1.0			

By default, the Configure Responsibilities tab opens.

3. Click **•**.

The New Roles Group page appears.

New Roles Group		×
Name		
Description		
Display Order		
Disabled		
	CANCEL	ADD

4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
	Specifies the name of the roles group.
Name	For example, Data Owner.
	Specifies the description of the roles group.
Description	For example: Roles in this group are accountable for who has access to
	information to assets in their functional areas.
Display	Specifies the order of the roles group in the roles group list.
Order	For example, 2.0.
Disabled or	Specifies whether the roles group is enabled.
Enabled	

5. Click Add.

The roles group is created and added to the roles group list.

Once a roles group is created, you can assign roles and users to catalogs in the Business Glossary Manager and <u>assign governance responsibilities</u> for the business assets.

You can also manage roles groups and view governance responsibilities reports.

Managing roles group involves:

- Editing roles group
- Deleting roles group

Managing Roles Group

Managing roles group involves:

- Editing roles group
- Deleting roles group

To manage roles group, follow these steps:

1. On the **Configure Responsibilities** tab, click a roles group.

•	Users	Roles	Profiles	Profiles Governance		Access R
Сс	onfigure Responsib	vilities Reports				
Da	ata Stewards	(1
Da	ata Owners	Name Data Owners		Enabled		
	Technical Data Steward Description Compliance Officer		Display Order 2.0		г	
		Available Roles	List of Users for s	elected Roles		
	Search		ROLE	USER ID	USER NAME	USER EMAIL
			Data Owner_GER	esimpson	Erica Simpson	e.simpson@xyz.c
		✓ Data Owner_GER	Data Owner_GER	madams	Mike Adams	m.adams@xyz.co

2. Use the following options:

Edit (🖍)

Use this option to update a roles group. You can update name, description, list of selected roles, and enable or disable the roles group.

Delete (

Use this option to delete a roles group that is no longer required.

Viewing Reports

A successful data governance program demands an efficient grouping of roles based on the responsibilities. It is also important to assign appropriate users and roles to catalogs and then assign governance responsibilities to business assets. The governance responsibilities report helps you track assignment of these governance responsibilities to the business assets in the Business Glossary Manager.

To view reports, on the Governance Responsibilities tab, click the Reports tab.

Use the following two views to view reports:

- Graphical View: The graphical view displays the governance responsibilities in a tree structure.
- Tabular View: The tabular view displays the governance responsibilities in a grid format.

By default, the graphical view opens.

Users	Roles	Profiles	Governance Responsibilities	Access Rights Report
Configure Responsibilities	Reports			
		Graphical View	Tabular View	× 🕁

To view report details in the graphical view, use the following options:

4	Users	Roles	Prof	iles	Governance	e Responsibiliti	es ,
	Configure Responsibilities	Reports					
		(Graphical View	Tabular	View	\$	⊎
		Ana Chu					
		Gov	vernance Responsi	bilities			
	Data Stewards	Data Own	ers Techr	hical Data Stev	ward C	ompliance Officer	

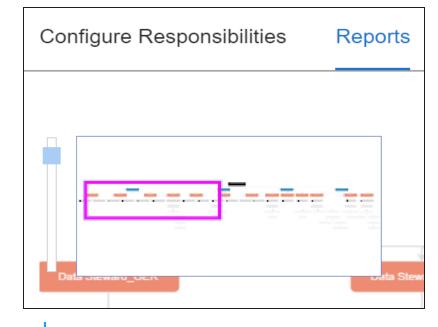
Expand/Collapse (\$\$\scrime\$)

Use this option to switch between the expanded or collapsed view. For example, the report displays the governance responsibilities in the expanded view.

Gi (C		Governance Responsibilities				
		l				
		Data Owners				
Data Owne	r_GER	Data Owner_RO	Data Owner_UK			
Erica Simpson (2)	Mike Adams (3)	Kartik Sridhar (3) Syed Rahim (0)	Mike Evans (0) 🐟 🙎 Mike Jones (0)			
Business Terms (2)	Business Terms (3)	Business Terms (3)				
Customer Master Catalog (2)	Customer Master Catalog (3)	Customer Master Catalog (3)				
	TechDocs (1)	TechDocs (1)				
4						

Pan View

Use this option to focus on a part of the governance responsibilities tree.



Export (

Use this option to download the report in the JPG format.

The Tabular View displays the governance responsibilities in a grid that includes, roles group, role, user details, asset name, asset type, and catalogs.

Users	Roles	Profiles	Governanc	e Responsibilities	Access Rights		
onfigure Responsibiliti	es Reports						
BUSINESS ASSETS	31)		Grapi	hical View Tabular Vie	w		
Group Name	Role Name	User Id	User Name	User Email	Business Asset	Asset Type	Catalog
Data Stewards	Data Steward_GER	mmannigan	Mike Mannigan	mmannigan@xyz.com	TestTaskList	Business Terms	Customer Master Catalog \rightarrow Tech
Data Stewards	Data Steward_GER	mmenza	Mike Menza	mmenza@xyz.com	TestTaskList	Business Terms	Customer Master Catalog \rightarrow Tecl
Data Stewards	Data Steward_UK	rcooper	Richard Cooper	rcooper@xyz.com	Goods Supply	Business Terms	Monetary Terms \rightarrow Microeconom

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