

erwin DI Business User Portal

Metadata Guide

Release v11.0

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Contact erwin

Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

Access the <u>erwin support</u> site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for <u>erwin DI Business User Portal (BUP)</u>, and includes the following:

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

For information about other erwin products, visit <u>http://erwin.com/</u>.

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If you have comments or questions, or feedback about erwin product documentation, you can send a message to <u>distechpubs@erwin.com</u>.

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Metadata

erwin Data Intelligence Suite (DI Suite) stores the scanned or imported metadata in a hierarchy, System > Environment > Table > Column. Thus, systems, environments, tables, and columns from your technical assets. You can view the metadata stored in erwin DI Suite in a similar hierarchy in erwin DI Business User Portal (BUP).

To access metadata, on the application menu, click **Metadata** > **<Technical_Asset>**. By default, the **<**Technical_Asset> card view appears.

Systems		
		2 Q = 🔿 =
3rd Party Flat Files 5★★★★★ (1 reviews)	Accounting System	Adventureworks :
♡₩₩₩₽₽₩		· ♡ ⊷ ,⊎ ⊜ ₽ ·
BIReports :	C Customer Order Entry	Customer S3
√ ياپ ⊷⊷ ♡		· ♡ ⊷ "

To access the <Technical_Asset> grid view, click

Syste	em	S														
										2	Q	6	ē		Ŧ	
Acti	ons							System	Rating				Busine	ss Purp	ose	•
C	2	••••	*	•))	Ø	• • •	1	3rd Party Flat Files	5 ★ ★ ★ ★ ★	(1 revi	iews)					ł
¢	2		₩	0))	Ø	• •		Accounting System	****	(no rev	iews)					
¢	2	•••	₩	•))	ø	• • •		Adventureworks	****	(no rev	iews)					
¢	2	•••	빴	0))	ø	• • •		BI Reports	****	(no rev	iews)					+

Options	Description
\heartsuit	Use this option to mark a technical asset favorite. This helps in searching an asset.
••••	Use this option to view lineage of technical assets.
4	Use this option to view impact analysis of technical assets.
())	Use this option to <u>view environments</u> under a systems. This option is available only for Systems.
*	Use this option to <u>view mind map</u> of assets.
•	Use this option to manage access to a technical asset or create tasks.
~	Use this option to display the number of other technical assets contained in tech- nical assets. This option is available only in the card view for Systems, Envir- onments, and Tables.
⊞	Use this option to <u>view tables</u> under environments. This option is available only for Environments.
£	Use this option to <u>view mappings</u> of technical assets. This option is available only for Columns and Tables.
B	Use this option to <u>view columns</u> under tables. This option is available only for Tables.
	Use this option to <u>view valid values</u> of columns. This option is available only for Columns.

Refer to the following table for descriptions of options under the **1**-Actions section.

Refer to the following table for descriptions of options under the **2**-Filter and Export section.

Options	Description
Q	Use this option to search required assets.
	Use this option to sort assets in alphabetical or reverse alphabetical order. This option is available only in the card view.
C	Use this option to download a list of assets in the XLSX format.
ŀ	Use this option to filter assets based on the available options.
ē	Use this option to print a list of assets.
	Use this option to select columns that you want to show in a grid. By default, all the columns are selected.

You can <u>rate and review an asset</u>, and also analyze metadata details by further drilling down the following technical assets:

- Systems
- Environments
- Tables
- Columns

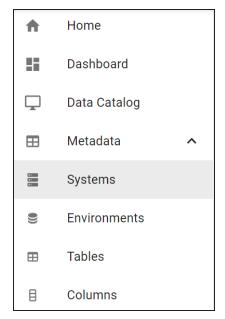
Systems

erwin DI Business User Portal (BUP) gives you access to view lineage, impact analysis, environments, mind map and associations of a system. You can view a list of all the systems and navigate through the list using advance filtering mechanisms to find the required system. You can also analyze technical details and extended properties of a system.

To view the Systems list in grid view, follow these steps:

1. On the application menu, click Metadata.

It expands to display Systems, Environments, Tables, and Columns.



2. Click Systems.

By default, the Systems card view appears.

Systems					
				Q =	ō =
3 3rd Party Flat Files ★★★★★ (no reviews)	:	A Accounting System	:	A Adventureworks	***
♡ ↓↓ ♥ ₽	~	ی سی سی میل	~	♡ ↓ .■ ₽	~

3. Click

The Systems page appears. It displays a list of systems.

Systems								
						९ 🙆 🖶	ш	Ŧ
Actions				System	Rating	Business Purpose Created	Ву	•
• •••	" €	Ø	0 0 0	Data Mart	5 \star \star \star \star \star (1 reviews)	This is a target system t Adminis	strator	
		Ø	0 0 0	Adventureworks	***** (no reviews)	The system acts as both Adminis	strator	

You can use the filter and export options to work on the Systems list. For more information on the filter and export options, refer to the <u>Metadata</u> topic.

You can drill down further and view a system's:

- Lineage
- Impact analysis
- Environments
- Mind maps

System Details

System details include data steward, business purpose, primary move type, server platform, server OS version of a system, and so on.

To view system details, in the **Systems** grid, click <System_Name>.

The <System_Name> page appears.

The Details tab displays the Technical Details, Data Governance, and Audit Details sections. You can scroll down the page to view the Extended Properties section.

C Data Mart 5★★★★★ (1 reviews) DETAILS ASSOCIATIONS		ي يلي 🤍 🗬 🕈				
Technical Details ^{System Name} Data Mart	Primary Move Type (Source/Target) Target	Classification Details				
Business Purpose This is a target system to store summal	Sensitive Data Classification PII					
Server Platform Windows	Server OS Version Windows Server 2012	_				
DBMS Platform	DBMS Version	Data Governance				
File Management Type MS Excel	File Location C:\Users\Talon Smith\erwin\Mike - Target System	Data Steward sbenedict				

Associations

A system may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of systems, on the <System_Name> page, click Associations.

The list of associated assets appears. You can click the <Asset_Name> appearing as hyperlink to view its details.

< Data M	lart			•••• <u>1</u> 1,
DETAILS	ASSOCIATI	ONS		
				२ 🖶 💷 👳
Actions	Name	Туре	Catalog Hierarchy	Relationship
₽	10 K and 10 Q	Business Term	Banking and Finance/Banking/American Banker/Legal/Governmental Laws and Regulations	is associated with
B	10-К	Business Term	Banking and Finance/Banking/Investopedia/Legal/Bonds and Agreements	is associated with
B	Holding	Table		is related with
			Rows per page: 10 👻	1-3 of 3 < >

You can use the filter and export options to work on the list. For more information on the filter and export options, refer to the Metadata topic.

To view association details, under the **Actions** column, click \mathbb{R} for the required asset.

The Association pane appears. It displays association details of the system with the asset.

< Data Mart	(1 reviews)				♥ 帅 ⊜ ₽ :
DETAILS	ASSOCIATIONS	_			
					Q 👼 🖩 👳
Actions		Name	Туре	Catalog Hierarchy	Relationship
R		Customer Zip Code cannot be	Business Rule	Customer Rules	is related with
æ		Employee Appraisal Report	Environment		is Related with

Environments

You can view list of environments in a system and access environment details that includes environment type, DBMS name, IP Address, and port. You can drill down further to view lineage, impact analysis, tables, and mind map of an environment.

To view environments in systems, in the **Systems** grid, click $\stackrel{\bigcirc}{=}$ for the required system.

By default, the Environments card view appears. You can click to view the Environments in grid view.

Environments							
		Q =	6 ₹				
4 45678 € 4 ★ ★ ★ ★ (1 reviews)	D DM Landing	D DM Staging 4 ★ ★ ★ ★ ★ (1 reviews)	:				
MS Excel EDW - Enterprise Data Wharehouse	erwin 9 EDW - Enterprise Data Wharehouse	erwin 9 EDW - Enterprise Data Wharehouse					
♥ ⊷ 炒 ⊞ ♥ ~	√. ⊷ باب 🖶	♡ ↓ ⊞ ₽	~				

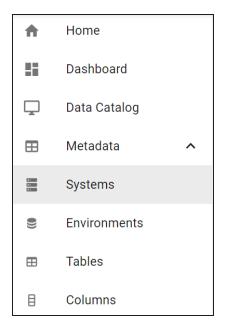
Environments

erwin DI Business User Portal (BUP) gives you access to view lineage, impact analysis, tables, mind map and associations of an environment. You can view a list of all the environments and navigate through the list using advance filtering mechanisms to find the required environment. You can also analyze technical details, miscellaneous details and extended properties of an environment.

To access Environments in grid view, follow these steps:

1. On the application menu, click **Metadata**.

It expands to display Systems, Environments, Tables, and Columns.



2. Click Environments.

By default, the Environments card view appears.

Environments		
		٩ = 🙆 =
Accounting Reports MS Excel BI Reports	Accounts Accounts Accounts (no reviews) Salesforce Salesforce	Accounts DW Accounts DW MS Excel Finance and Billing
♡ ↓ ⊞ ₽	· ♡ ··· ↓ ⊞ ₽	✓ ♥ ••• ↓ ■ ♥ ✓

3. Click

The Environments page appears. It displays a list of systems. You can click <Environment_Name> and <System_Name> to view their details.

Environ	iment	ts											
									C	6	ē	ш	Ŧ
Actions						Environment	Rating	System	Environment	уре	D	BMS Nam	ie
۲	***	唹	⊞	Ø	0 0 0	45678	4 \star \star \star \star \star (1 reviews)	EDW - Enterprise Dat					
۲	•••	唹	⊞	ø	* *	COE	4 ★ ★ ★ ★ ★ (1 reviews)	Customer Order Entry	test		Ν	/IS Excel	File
٠		<i>ф</i>	⊞	Ø	:	DM Landing	\star \star \star \star (no reviews)	EDW - Enterprise Dat	test		E	RWin XM	1L Fil€

You can use the filter and export options to work on the list. For more information on the filters and export options, refer to the <u>Metadata</u> topic.

You can further drill down to view an environment's:

- Lineage
- Impact Analysis
- Tables
- Mind map

Environment Details

The environment details include environment type, database type, server platform, server OS version, and so on.

To view environment details, in the **Environments** grid, click <Environment_Name>.

The <Environment_Name> page appears.

The Details tab displays the Technical Details, Data Governance, and Audit Details sections. You can scroll down the page to view Miscellaneous Details and Extended Properties sections.

< DM Staging 4★★★★★ (1 reviews) DETAILS ASSOCIATIONS		ل بين مي الله الله الله الله الله الله الله الل
Technical Details		Classification Details
Environment Name	Environment Type	Sensitive Data Indicator (SDI)
DM Staging	test	Sensitive Data Classification
		PII -
System Name	Database Type	· · · · · · · · · · · · · · · · · · ·
EDW - Enterprise Data Wharehouse	erwin 9	 Sensitive Data Description
		Personally Identifiable Information
Server Platform	Server OS Version	
Windows	Windows Server 2012	
File Management Type	File Location	
Production System Name	Production Environment Name	Data Governance
Customer Order Entry	SQLEnv	Data Steward
		sbenedict
Version	Version Label	

Associations

An environment may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of environments, on the <Environment_Name> page, click **Associations**.

The list of associated assets appears. You can click the <Asset_Name> appearing as hyperlink to view its details.

< DM Staging 4 * * * * * (1	1 reviews)			۲	***		⊞	٩	:
DETAILS	ASSOCIATIONS								
					Q		j• ∎		Ŧ
Actions	Name	Туре	Catalog Hierarchy		Relations	hip			
æ	email Validation	Environment			DQ Rule	to be i	mplem	nented	ł
E	10 per 10 Rule	Business Term	ce/International Risk Management Institute - IRMI		is associ	iated wi	th		

You can use the filter and export options to work on the grid. For more information on the filter and export options, refer to the Metadata topic.

To view association details, under the **Actions** column, click \mathbb{R} for the required asset.

The Association pane appears. It displays association details of the environment with the asset.

<	DM Staging 4 ★ ★ ★ ★ ★ (1 reviews)				٠	··· , 1/2 E	∃ @	
	DETAILS ASSOCIATION	IS						
						० 🖷	ш	Ŧ
1	Actions	Name	Туре	Catalog Hierarchy	Re	elationship		11
	R	email Validation	Environment		D	Q Rule to be imp	lemente	ed
	Ę	10 per 10 Rule	Business Term	ce/International Risk Management Institute - IRMI	is	associated with		

Tables

You can view list of tables in an environment. It displays information that includes logical name, expanded logical name, table type, and workflow status. You can drill down further to view mappings, lineage, impact analysis, columns, and mind map of a table.

To view tables in environments, in the **Environments** grid, click 🗄 for the required environment.

By default, the Tables card view appears. You can click III to view the Tables in grid view.



Tables

erwin DI Business User Portal (BUP) gives you access to view mappings, lineage, impact analysis, columns, mind map and associations of a table. You can view a list of all the tables and navigate through the list using advance filtering mechanisms to find the required table. You can also analyze technical, business and extended properties of a table.

To access the Tables list in grid view, follow these steps:

1. On the application menu, click **Metadata**.

It expands to display Systems, Environments, Tables, and Columns.

A	Home	
	Dashboard	
Ţ	Data Catalog	
⊞	Metadata	^
80 91 80	Systems	
0))	Environments	
⊞	Tables	
₿	Columns	

2. Click Tables.

By default, the Tables card view appears.



3. Click

The Tables page appears. It displays a list of tables. You can click <Table_Name>, <System_Name>, and <Environment_Name> to view their details.

Tables	1															
										С	ξ	6	ē	ш	Ŧ	
Action	s						Table	Rating	Logical Table	Table	Expar	ided L	ogical	.	System	1
۲	÷		₩	₿	Ø	* * *	Claim	4 ★ ★ ★ ★ ★ (1 reviews)	Claim						EDW -	Ei
•	÷	***	₩	₿	Ø	* * *	Claims Analysis	4 \star \star \star \star \star (1 reviews)	Claims Analysis						EDW -	Er
\heartsuit	ł	***	₩	₿	ø	:	Date	\star \star \star \star \star (no reviews)	Date						EDW -	Ei

You can use the filter and export options to work on the list. For more information on the filters and export options, refer to the <u>Metadata</u> topic.

You can further drill down to view a table's:

- Mappings
- Lineage
- Impact Analysis

- Columns
- Mind map

Table Details

Table details include environment name, system name, table definition, logical table name, expanded logical name, and so on.

To view table details, in the **Tables** grid, click <Table_Name>.

The <Table_Name> page appears. The Details tab displays the Technical Details, Business Details, User Defined Properties, and Extended Properties sections.

Claim 4 ★ ★ ★ ★ (1 reviews) DETAILS ASSOCIATIONS		🎔 📲 🚥 沙 目 🖗 🗄
Technical Details Table Name Claim	File Type	Classification Details Type Table
Environment Name DM Staging Number of Rows	System Name EDW - Enterprise Data Wharehouse Synonym Reference	Sensitive Data Indicator (SDI) Sensitive Data Classification PII
		Sensitive Data Description Personally Identifiable Information
Business Details	Table Comments	
A claim is a statement listing services rendered, the dates of		Data Governance
Logical Table Name Claim	Table Expanded Logical Name	Data Steward sbenedict

Associations

A table may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of tables, on the <Table_Name> page, click the Associations tab.

The list of associated assets appears. You can click the <Asset_Name> appearing as hyperlink to view its details.

< Claim 4 * * * * (1 reviews)					۲	ł		唹	₿	Ŷ	:
DETAILS ASSOCI	IATIONS										
							C		þ II		Ŧ
Actions		Name	Туре	Catalog Hierarchy		Relatio	nship				
B		Employee Appraisal Report	Environment			is ass	ociated	l with			

You can use the filter and export options to work on the list. For more information on the filters and export options, refer to the Metadata topic.

To view association details, under the **Actions** column, click \mathbb{R} for the required asset.

The Association pane appears. It displays association details of the table with the asset.

< Claim 4 ★ ★ ★ ★ ★ (1 rev	iews)	♥ •€ ••• 炒目 @ :	> Association
DETAILS A	SSOCIATIONS		Association Details
		Q 👼 🖩 葉	Source Name Claim
Actions	Name Type	Catalog Hierarchy Relationship	Source Type Table
B	Employee Appraisal Rep Enviro	ment is associated with	Relationship Name is associated with
			Target Name Employee Appraisal Report Target Type Environment

Columns

You can view list of columns in a table. It displays information that includes logical names, expanded logical names, and data type of columns. You can drill down further to view mappings, lineage, impact analysis, valid values, and mind map of a column.

To view columns in tables, in the **Tables** grid, click for the required table.

By defualt, the Columns card view appears. You can click III to view the Columns in grid view.

		0, - 🙆 -
C Claim Count ★★★★★ (no reviews)	C Claim Surrogate Key ***** (no reviews)	Date Identifier :
EDW - Enterprise Data Wharehouse/DM S Count of	EDW - Enterprise Data Wharehouse/DM Claim Surr	EDW - Enterprise Data Wharehouse A unique identi
♡ -€	♡ =≣	♡ щ … ୬ ≡ ₽
	DW - Enterprise Data Wharehouse/DM S Count of	DW - Enterprise Data Wharehouse/DM S Count of EDW - Enterprise Data Wharehouse/DM Claim Surr

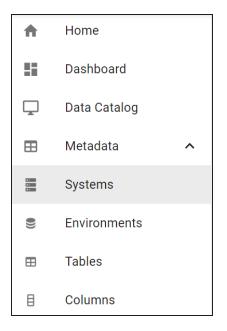
Columns

erwin DI Business User Portal (BUP) gives you access to view mappings, lineage, impact analysis, valid values, mind map, and associations of a column. The Columns grid displays all the columns and you can easily navigate through the grid using advance filtering mechanisms to find the required row. You can also analyze technical, business and extended properties of a column.

To access the Columns grid follow these steps:

1. On the application menu, click **Metadata**.

It expands to display Systems, Environments, Tables, and Columns.



2. Click Columns.

By default, the Column card view appears.

				Q	F (5 .
					eviews)	:
Count of EDW - En	terprise Data Wharehou	se/DM Claim Surr	EDW - Enterpris	e Data Whare	house A u	nique identi.
\heartsuit	€	≣ ₽	♡ -€	···· ,!!/	≡ 6	?
	• •	C 大大大大 (no revie Count of EDW - Enterprise Data Wharehou	Count of EDW - Enterprise Data Wharehouse/DMClaim Surr	Count of EDW - Enterprise Data Wharehouse/DM Claim Surr EDW - Enterprise	: C Claim Surrogate Key : D Date Identifier まままま(no reviews) EDW - Enterprise Data Wherehouse/DMClaim Surr EDW - Enterprise Data Wherehouse/DMClaim Surr	: C Claim Surrogate Key : D Date Identifier 素素素素(no reviews) Count of _ EDW - Enterprise Data Wharehouse/DM_ Claim Surr EDW - Enterprise Data Wharehouse. A u

3. Click

The Columns page appears. It displays a list of columns. You can click <System_ Name>, <Environment_Name>, <Table_Name>, and <Column_Name> to view their details.

Columi	ns													
									Q	0	e		Ŧ	
Actions	5						Column	Rating	Logical Column			Colum	ın Exp	and
\heartsuit	÷	•••	唹	≡	ø	:	Claim Amount US Dol	★★★★ (no reviews)	Claim Amoun	US Do	ol			
\heartsuit	-(₩	=	ø	* *	Claim Count	★★★★ (no reviews)	Claim Count					
\heartsuit	-(•••	唹	:=	Ø	:	Claim Surrogate Key	\star \star \star \star \star (no reviews)	Claim Surroga	ite Key				

You can use the filter and export options to work on the grid. For more information on the filters and export options, refer to the <u>Metadata</u> topic.

You can further drill down to view a column's:

- Mappings
- Lineage
- Impact Analysis
- Valid Values
- Mind map

Column Details

Column details include environment name, system name, column definition, logical column name, column expanded logical name, and so on.

To view column details, in the Columns grid, click <Column_Name>.

The <Column_Name> page appears. The Details tab displays the Technical Details, Business Details, User Defined Properties, and Extended Properties section.

< Claim Amount US Dollars ***** (no reviews)						
DETAILS ASSOCIATIONS VAI	ID VALUES					
Technical Details		Classification Details				
Column Name Claim Amount US Dollars	Table Name Claims Analysis	Sensitive Data Indicator (SDI)				
Environment Name	System Name	Sensitive Data Classification Confidential				
DM Staging	EDW - Enterprise Data Wharehouse	Sensitive Data Description				
File Starting Position	Data Domain	Confidential				
Data Type	Length					
Precision	Scale	Data Governance				
Primary Key	Forelan Key	Data Steward sbenedict				

Associations

A column may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of columns, on the <Column_Name> page, click the **Associations** tab.

The list of associated assets appears. You can click the <Asset_Name> appearing as hyperlink to view its details.

Claim Amount US Dollar ★★★★ (no reviews)	'S			\heartsuit	-E		₩	≣	ø	:
DETAILS ASSOCIATION	NS VALID VALUES									
						Q	•	a III	1 3	Ŧ
Actions	Name	Туре	Catalog Hierarchy		R	elations	hip			
R	1 Divided 10 Net 30	Business Term	Getting Started Glossari	es/Ba	is	Repres	sented	Ву		
R	CLAIM_FOLDER	Table								

You can use the filter and export options to work on the grid. For more information on the filters and export options, refer to the <u>Metadata</u> topic.

To view association details, under the **Actions** column, click \mathbb{R} for the required asset.

The association details of the column with the asset appears.

< Claim Amou	Int US Dollars o reviews)	♡ -{ 炒 ≡ ₽ :	> Association
DETAILS	ASSOCIATIONS VALID VALUES		Association Details
		Q 🖨 III 👳	Source Name Claim Amount US Dollars
Actions	Name Type	Catalog Hierarchy Relationship	Source Type Column
E	1 Divided 10 Net 30 Business Term	Getting Started Gloss is Represented By	Relationship Name is Represented By
Æ	CLAIM_FOLDER Table		Target Name 1 Divided 10 Net 30
4		,	Target Type Business Term

Valid Values

You can view the assigned codesets to the column as valid values.

To view the valid values of columns, on the <Column_Name> page, click the **Valid Values** tab.

<			\heartsuit		> Association
DETAILS AS	SOCIATIONS VALID V	ALUES			Association Details
			Q	6 ē Ⅲ ₹	Source Name Claim Amount US Dollars
Category Hierarchy	Codeset	Codeset Version	Code Name	Code Value	Source Type Column
erwinDISAccounts	erwinProdAccounts	1.01	1005	210	Relationship Name
erwinDISAccounts	erwinProdAccounts	1.01	1016	211	is Represented By
erwinDISAccounts	erwinProdAccounts	1.01	1016	212	1 Divided 10 Net 30
erwinDISAccounts	erwinProdAccounts	1.01	1016	213	Target Type Business Term

You can also view valid values of a column in the Columns grid. For more information on viewing valid values in the Columns grid, refer to the <u>Valid Values</u> topic.

Valid Values

You can view the assigned codesets to the column as valid values.

To view the valid values of columns, in the **Columns** grid, click

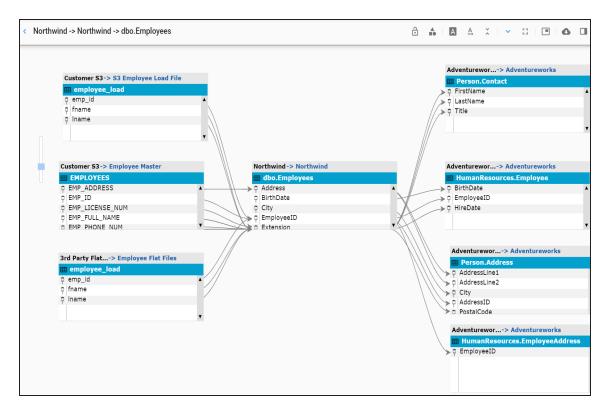
< Claim Amount US Dollars	\heartsuit	-€ ⇒ ≡ ₽ :	> Association
DETAILS ASSOCIATIONS VALID VALI	JES		Association Details
		ଦ୍ 🙆 👼 🖩 👳	Source Name Claim Amount US Dollars
Category Hierarchy Codeset	Codeset Version Code Nar	ne Code Value	Source Type Column
erwinDISAccounts erwinProdAccounts	1.01 1005	210	Relationship Name
erwinDISAccounts erwinProdAccounts	1.01 1016	211	is Represented By
erwinDISAccounts erwinProdAccounts	1.01 1016	212	1 Divided 10 Net 30
erwinDISAccounts erwinProdAccounts	1.01 1016	213	Target Type Business Term
		•	

Lineage

You can view lineage of a technical asset and trace data's origin, its transformations, and its destination after source to target mappings.

To view lineage, in the <Technical_Asset> grid, click ••• for the required technical asset.

The lineage of the technical asset appears.



Use the following options to work on the lineage:

View Sensitivity Data Indicator (🖻)

Use this option to view the sensitivity data indicator of assets.

View Sensitivity Data Classification (

Use this option to view sensitivity data classification of assets.

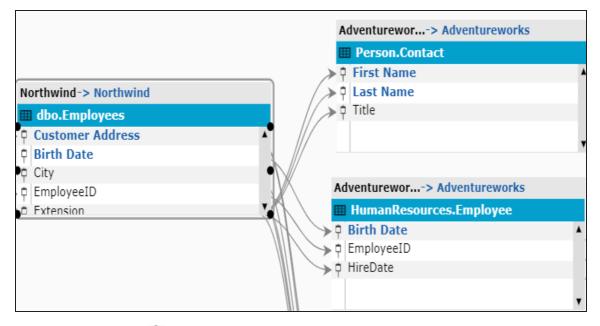
For example, the following lineage displays sensitive data classifications of assets as Restricted or PII.

			A	dventurewor> Adventure	works	
			8	Person.Contact		
			> 5	FirstName	Restricted	
Northwind-> Northwind			/>5	LastName	Restricted	
🗰 dbo.Employees			// > 5	Title	Restricted	
Address	Restricted	▲ /	//			
BirthDate	Restricted		/ _			1
¢ City						
EmployeeID			A	dventurewor> Adventure	works	
Extension		· A	\ 🔳	HumanResources.Employ	/ee	
		MY)	> 9	BirthDate	PII	
			$\rightarrow \uparrow$	EmployeeID	PII	
		11//	>7	HireDate	PII	
		///				
		0.0				¥.

Logical Names (A)

Use this option to view logical names of the assets.

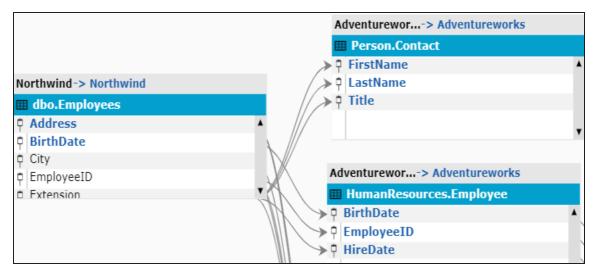
For example, the following lineage displays the logical names of columns in blue color.



Expanded Logical Names ($\stackrel{A}{\rightarrow}$)

Use this option to view the expanded logical names of assets.

For example, the following lineage displays the exapanded logical names of columns in blue color.

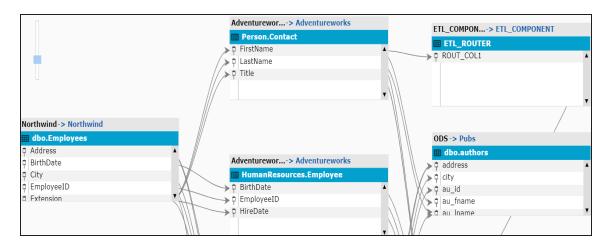


Overview Lineage (Å)

Use this to switch between detailed lineage view and overview lineage view. By default, detailed lineage view appears.

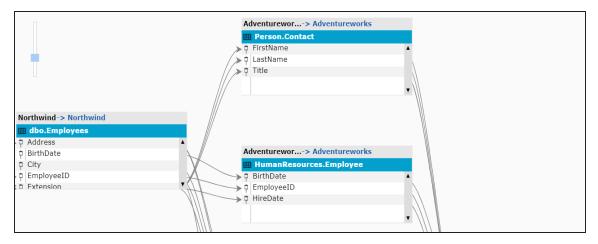
Detailed lineage view: This view is helpful to technical users like ETL developers. When you reverse engineer ETL jobs or SQL scripts, the lineage might contain temporary tables, ETL components (filters, joiners, routers etc.). This view includes technical assets that do not exist in the Metadata Manager.

For example, the following lineage displays the ETL_ROUTER and dbo.authors tables. These do not exist in the Metadata Manager.



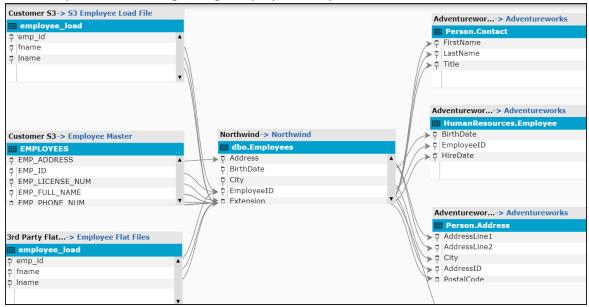
Overview lineage view: This view is helpful to business users. It excludes technical assets that do not exist in the Metadata Manager.

For example, the following lineage does not display the ETL_ROUTER and dbo.authors tables.



Expand (A)

By default, lineage appears in the expanded view. Use this option to switch between the collapsed and expanded view. The expanded view includes technical assets lower in hierarchy.

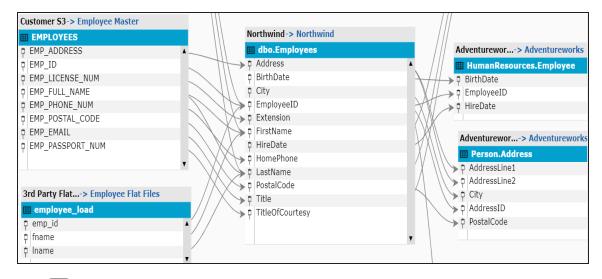


For example, the following lineage displays the expanded view that includes columns.

Autofit (

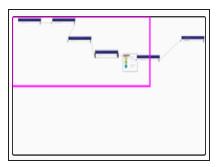
This switch is available when you are in the expanded view (\checkmark). Use it to switch between Auto Expand View and Autofit view. The Auto Expand view shrinks the space for the technical assets lower in hierarchy and the Autofit view expands the space to fit the list of technical assets lower in hierarchy.

For example, the following lineage appears in the Autofit view that expands the space for columns.



Overview (🔳)

By default, the overview does not appear. Use this switch to make the overview appear or disappear. You can move the purple box in the overview to navigate across the lineage.



Export (🕑)

Use this option to download the lineage in the PDF, XLSX, or, JPG format.

Properties (

Click a technical asset to view its properties under this pane. It has different sections for different lineage types.

System's Lineage:

- Summary: This section gives information about the number of environments acting as source, target, or both in the lineage.
- System Details: This section gives information about the selected system in the lineage.
- Environment Details: This section displays a list of environments under the selected system. The list does not include environments that are not part of lineage.
 You can click <Environment_Name> to view the environment's lineage.
- Extended Properties: This section displays the extended properties configured for the selected system.

Environment's Lineage

- Summary: This section gives information about the number of tables acting as source, target, or both in the lineage.
- Environment Details: This section gives information about the selected environment in the lineage.
- Table Details: This section displays a list of tables under the selected environment. The list does not include tables that are not part of lineage. You can click <Table_Name> to view the table's lineage.
- Extended Properties: This section displays the extended properties configured for the selected environment.

Table's Lineage

- Summary: This section gives information about the number of columns acting as source, target, or both in the lineage.
- Column Details: This section displays a list of columns under the selected table. The list does not include columns that are not part of lineage. You can click
 <Column_Name> to view the column's lineage.
- Technical: This section displays the technical properties of the selected table.
- Business: This section displays the business properties of the selected table.
- Extended Properties: This section displays the extended properties configured for the table.

Column's Lineage

- Summary: This section gives information about the number of columns acting as source, target, or both in the lineage.
- Technical: This section displays the technical properties of the selected column.
- Business: This section displays the business properties of the selected column.
- Transformation: This section displays the transformation details of the selected column.
- Valid Values: This section displays the codesets assigned to the selected column.
- Extended Properties: This section displays the extended properties configured for the selected column.

Highlighting lineage path

To highlight a lineage path with respect to a technical asset, click the technical asset in the lineage. The technical asset is highlighted in orange color, its forward lineage path appears in red, and its reverse lineage path appears in blue. The technical assets that are not part of the lineage path disappear.

For example, in the following lineage the forward lineage path of EmployeeID appears in red, and its reverse lineage path appears in blue.

Customer S3-> S3 Employee Load File			Adventurewor> Adventureworks	
🗰 employee_load				
¢ emp_id				
¢ fname	_ λ			
¢ Iname				
	•			
			Adventurewor> Adventureworks	
			HumanResources.Employee	
			DirthDate EmployeeID	^
Customer S3-> Employee Master	Northwind-> Northwind		HireDate	
EMPLOYEES	🗰 dbo.Employees			
P EMP_ADDRESS	▲	•		•
¢ EMP_ID	¢ BirthDate			
¢ EMP_LICENSE_NUM	¢ City			
¢ EMP_FULL_NAME	¢ EmployeeID		Adventurewor> Adventureworks	
D EMP PHONE NUM	Fxtension	•	Person.Address	
			🖞 AddressLine1	^
			¢ AddressLine2	
			• City	•
			AddressID	1
3rd Party Flat> Employee Flat Files			PostalCode	۲,
🗰 employee_load				
¢ emp_id				
¢ fname				
¢ Iname				

Impact Analysis

A technical asset may act as a source, target, or both in mapping projects. Impact analysis details of a technical asset displays the impact of the technical asset as source and target. In addition to this the impact analysis of tables and columns display:

- Indirect (upstream and downstream) impact
- Other impacts (business rules, source extract SQL, and lookups)

Systems

To view impact analysis details of systems, in the **Systems** grid, click ^{JU} for the required system.

< Impact Analysis Details for Data Wa	arehouse		6
As Source			ш
Project Name	Mapping Name	Target System	
CRD - Data Catalog	Data Warehouse To Data Mart	Data Mart	
		Rows per page: 10 ♥ 1-1 of 1 <	>
As Target			
Project Name	Mapping Name	Source System	
CRD - Data Catalog	Staging To Data Warehouse	Staging	
		Rows per page: 10 ▾ 1-1 of 1 <	>

Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the checkboxes for the columns that are not required in the grid.

You can click the required <Mapping_Name> to view the mapping details.

To download the impact analysis in the XLSX format, click .

Environments

To view impact analysis details of environments, in the **Environments** grid, click equired for the required environment.

< Impact Analysis Details for Custom SQL System	er Order Entry		4
As Source			
Project Name	Mapping Name	Target Environment	Target System
EDW	CUSTOMER_MAP	SAP	SAP
EDW	CUSTOMER_MAP	SOLEnv	<u>SOL System</u>
test_lineage	CUSTOMER_MAP	SAP	SAP
test_lineage	CUSTOMER_MAP	<u>SQLEnv</u>	<u>SOL System</u>
			Rows per page: 10 \checkmark 1-4 of 4 < >
As Target			ш
Project Name	Mapping Name	Source Environment	Source System
EDW	CUSTOMER_MAP	ETL	EIL
Lineage_Demo	test	SQLEnv	<u>SQL_System</u>
test_lineage	CUSTOMER_MAP	ETL	EIL

Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the checkboxes for the columns that are not required in the grid.

You can click the required <Mapping_Name>, <Environment_Name>, or <System_Name> to view its details.

To download the impact analysis in the XLSX format, click 🚯.

Tables

A table may act as a source, target, or both in mapping projects. It may also act as a business rule, source extract SQL, or lookup condition.

To view impact analysis details of tables, in the **Tables** grid, click equal back = 1
equal back back = 1
equal back = 1
equ

Impact Analysis Details for Account TABLEAU > PRESENTATION LAYER		Ô
Summary Indirect Impact	Summary Indirect Impact	Audit Details Created By Administrator Created At 10/24/2019 10:31 AM Updated By Administrator Updated At 06/01/2020 7:36 AM

You can view the summary of indirect impact of the table in pie chart and bar graph. Use to download the complete impact analysis in the XLSX format.

Direct Impact

You can scroll down the page to view direct impact of the table under the Direct Impact tab.

DIRECT IMPACT	INDIRECT IMPACT OTHER IMPACTS					
As Source						ш
Project Name	Mapping Name	Target Table	Target Environment	Target System	Business Rule	
Lineage_Demo	Account_Claims	Claim	DM Staging	erwin DM		
				Rows per page: 10	▼ 1-1 of 1 <	>
As Target						
Project Name	Mapping Name	Source Table	Source Environment	Source System	Business Rule	
Lineage_Demo	Account_Tableau_Report	dbo.BD_DM_ACCTMAST	EDW	INFORMATICA		
Lineage_Demo	Account_Tableau_Report	dbo.BD_DM_ACCTMAST	EDW	INEORMATICA	1	
Lineage_Demo	Account_Tableau_Report	dbo.BD_DM_ACCTMAST	EDW	INFORMATICA	UPPER	
				Rows per page: 10	➡ 1-3 of 3 <	>

On the Direct Impact tab, you can click <Mapping_Name>, <Table_Name>, <Environment_ Name>, and <System_Name> to view their details.

Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Indirect Impact

Indirect impact analysis displays upstream and downstream impact of tables.

To view indirect impact, click the **Indirect Impact** tab.

DIRECT IMPACT	INDIRECT IMPACT OTHER IMP	ACTS					
Upstream ar	nd Downstream Impact						ш
Project Name	Mapping Name	Source Table	Source Environment	Source System	Target Table	Target Environment	Target System
Lineage_Demo	Account_Claims	Account	PRESENTATION LAYER	TABLEAU	<u>Claim</u>	DM Staging	erwin DM
Lineage_Demo	Informatica_m_CBDR_BDM_CASA	BD_BA_CUST_ACCT_AO_LOB_XREF	Source Definition	Informatica	<u>SQ_BD_MIS_CH_ACCT_MAST</u>	Source Qualifier	Informatica
test_lineage	Informatica_m_CBDR_BDM_CASA	BD_BA_CUST_ACCT_AO_LOB_XREF	Source Definition	Informatica	<u>SQ_BD_MIS_CH_ACCT_MAST</u>	Source Qualifier	Informatica
Lineage_Demo	Account_Tableau_Report	dbo.BD_DM_ACCTMAST	EDW	INFORMATICA	Account	Presentation Layer	TABLEAU
Lineage_Demo	Informatica_m_CBDR_BDM_CASA	dbo.BD_MIS_CH_ACCT_MAST	STAGING	TALEND	<u>SQ_BD_MIS_CH_ACCT_MAST</u>	Source Qualifier	Informatica
test_lineage	Informatica_m_CBDR_BDM_CASA	dbo.BD_MIS_CH_ACCT_MAST	STAGING	TALEND	<u>SQ_BD_MIS_CH_ACCT_MAST</u>	Source Qualifier	Informatica

On the Indirect tab, click <Mapping_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

Use **IIII** to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Other Impacts

Other impacts refer to impact of a table in:

- Business rules
- Source extract SQL
- Lookups

To view other impacts, click the **Other Impact** tab.

IRECT IMPACT	INDIRECT IMPACT OTHER I	MPACTS												
In Business I	Rules													ш
Project Name	Mapping Name	Sou	rce Table	Source En	vironment	Source System	Targe	et Table Ta	arget Environment	Target System	Business Rule	Extended Bu	siness	Rule
Lineage_Demo	Informatica_m_CBDR_BDM_CASA	LKP	ACCT_CARD_REL	Lookup Pr	ocedure	Informatica	EXP	CASA E	xpression	<u>Informatica</u>	Account			
											Rows per page: 10 👻	1-1 of 1	<	>
In Source Ext	tract SQL													ш
Project Name		Mappin	ng Name						Sour	ce Extract SQL				
Lineage_Demo		Informa	atica_m_CBDR_BDM_C	CASA					Sele	ct * from Account				
											Rows per page: 10 💌	1-1 of 1	<	>
In Lookups														ш
Project Name	Mapping Name	Source Table	Source Environment	Source System	Target Table		arget nvironment	Target System	n Lookup Conditio	n		Lookup On		Lookup Referenc
ineage_Demo	Account_Claims	Account	PRESENTATION LAYER	<u>TABLEAU</u>	<u>Claim</u>	D	<u>M Staging</u>	erwin DM	SELECT Cod Acc Account.Acct At		t WHERE Cod Acct No =	Cod Acct No)	

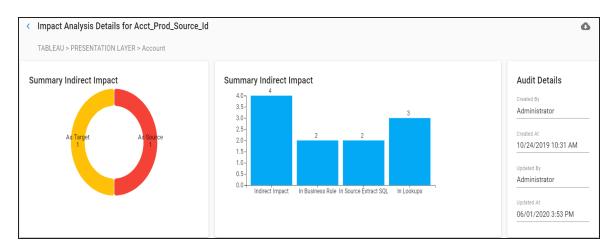
On the Other Impact tab, click <Mapping_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

Use **IIII** to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Columns

A column may act as a source, target, or both in mapping projects. It may also act as a business rule, source extract SQL, or lookup condition.

To view impact analysis details of columns, in the **Columns** grid, click ^{JU} for the required column.



You can view the summary of indirect impact of the column in pie chart and bar graph. Use to download the complete impact analysis in the XLSX format.

Direct Impact

You can scroll down the page to view direct impact of the column under the Direct Impact tab.

DIRECT IMPACT	INDIRECT IMPACT OTHER IMPAC	TS							
As Source									ш
Project Name	Mapping Name	-	Target Column	Target Table	Target Environment	Target System		Business Rule	
Lineage_Demo	Account_Claims	9	Claim Status Description	<u>Claim</u>	DM Staging	erwin DM			
						Rows per page:	10 🕶	1-1 of 1 <	>
As Target									
Project Name	Mapping Name	:	Source Column	Source Table	Source Environment	Source System		Business Rule	-
Lineage_Demo	Account_Tableau_Report	l	ACCT_PROD_SOURCE_ID	dbo.BD_DM_ACCTMAST	EDW	INFORMATICA			

On the Direct Impact tab, you can click <Mapping_Name>, <Column_Name>, <Table_ Name>, <Environment_Name>, and <System_Name> to view their details. Use to select columns that you want to show in the Direct Impact grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Indirect Impact

Indirect impact analysis displays upstream and downstream impact of columns.

To view indirect impact, click the **Indirect Impact** tab.

Upstream a	nd Downstream Impact							
Project Name	Mapping Name	Source Column	Source Table	Source Environment	Source System	Target Column	Target Table	Target Environment
Lineage_Demo	Account_Tableau_Report	ACCT_PROD_SOURCE_ID	dbo.BD_DM_ACCTMAST	<u>EDW</u>	INFORMATICA	Acct_Prod_Source_Id	Account	<u>Presentation</u> Layer
Lineage_Demo	Account_Claims	Acct_Prod_Source_Id	Account	PRESENTATION LAYER	<u>TABLEAU</u>	Claim Status Description	<u>Claim</u>	<u>DM Staging</u>
Lineage_Demo	Informatica_m_CBDR_BDM_CASA	SOURCE_ID	EXP_CASA	Expression	<u>Informatica</u>	ACCT_PROD_SOURCE_ID	dbo.BD_DM_ACCTMAST	<u>EDW</u>
test_lineage	Informatica_m_CBDR_BDM_CASA	SOURCE_ID	EXP_CASA	Expression	<u>Informatica</u>	ACCT_PROD_SOURCE_ID	dbo.BD_DM_ACCTMAST	<u>EDW</u>

On the Indirect tab, you can click <Mapping_Name>, <Column_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Other Impacts

Other impacts refer to impact of a column in:

- Business rules
- Source extract SQL
- Lookups

To view other impacts, click the **Other Impact** tab.

RECT IMPACT	INDIRE	CT IMPACT OTHER IN	IPACTS											
In Business F	Rules													
Project Name		Mapping Name	Source Column	Source Table	Source Environment	Source System	Target Colum	n Tai	irget Table	Target Environment	Target System	Business Rule	Extended Business	s Ru
Lineage_Demo		Informatica_m_CBDR_BD M_CASA	COD_ACCT_NO	LKP_ACCT_CARD_REL	Lookup Procedure	Informatica	COD_ACCT_N	01 EX	(P_CASA	Expression	Informatica	Acct Prod Source Id		
Lineage_Demo		Talend_staging	ACCT_PROD_SOURCE_ID	<u>1Mao_1</u>	tMep_1	TALEND	ACCT_PROD_S	SOURCE_ID 1Fi	ilterRow_1	tFilterRow_1	TALEND	row2.ACCT_PROD_SOURC E_ID		
												Rows per page: 10 👻	1-2 of 2 <	>
In Source Ext	tract S(QL												
Project Name					Mapping Name					Source Extract SQL				
EDW					CUSTOMER_MAP					Select Acct_Prod_Sou	rce_Id from Account			
Lineage_Demo					Account_Tableau_Report					select Acct_Prod_Sou	rce_Id from Account			
												Rows per page: 10 👻	1-2 of 2 <	>
In Lookups														
Project Name		Mapping Name	Source Column	Source Table	Source Environment	Source System	Target Column	Targe	et Table	Target Environment	Target System	Lookup Condition	Lookup On	
Lineage_Demo		Informatice_m_CBDR_BD M_CASA	ACCT_OFCR_BUS	<u>EXP.CASA</u>	Expression	Informatica	ACCT_OFCR_BU	<u>S dbo.E</u>	<u>BD_DM_ACCTMAST</u>	EDW	INFORMATICA	SELECT Acct Atm Status, Acct Cod Coy, Acct Prod Source Id, Cod Acct No, Number of Records FROM Account WHERE Acct Atm Status = EVP_CASA.ACCT_OFCR_B US	Acct Atm Status	

On the Other Impact tab, click <Mapping_Name>, <Table_Name>, <Environment_Name>, and <System_Name> to view their details.

Use to select columns that you want to show in the grid. By default, all the columns appear as selected. You can clear the check boxes for the columns that are not required in the grid.

Mappings

You can view mappings of technical assets (tables and columns) where they act as source or target.

To view mappings, in the <Technical_Asset> grid, click •••.

The Mappings page appears. By default, the Source tab opens.

For example, the following image displays mappings of the Account table where it acts as source.

< Account					
SOURCE	TARGET				
Mappings					
Project	Subject	Mapping	Target System Name	Target System Environm	Target Table Name
Lineage_Demo		Account_Claims	erwin DM	DM Staging	Claim

To view a list of mappings where the technical asset (table or column) is a target, click the **Target** tab.

< Account					
SOURCE	TARGET				
Mappings					
Project	Subject	Mapping	Source System Name	Source System Environ	Source Table Name
Lineage_Demo		Account_Tableau_Re	INFORMATICA	EDW	dbo.BD_DM_ACCTM
Lineage_Demo		Account_Tableau_Re	INFORMATICA	EDW	dbo.BD_DM_ACCTM
Lineage_Demo		Account_Tableau_Re	INFORMATICA	EDW	dbo.BD_DM_ACCTM

You can click <Mapping_Name>, <Source_System_Name>, <Source_System_Environment>, or <Source_Table_Name> to view their details.

Mind Maps

A mind map is a pictorial representation of associated assets. You can view sensitivity of assets, logical and expanded logical name of tables and columns, and relationships between the assets. It is also possible to use filter to view more focused mind map based on asset types and relationships.

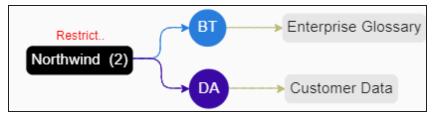
To view mind map of technical assets, in the <Technical_Asset> grid, click P.

< N	Vorthwind	+1			A ~	 A 	A, ∣ ≔	2	K N N	<u>ЧК</u>	6	Ŧ	
		No	Rest orthw	trict ind (2)	BT	> Enterprise	e Glossary <	Restric → Customer (3	1)				
					DA	> Custome	r Data		Lege	end			
									EN		nments	;	•
									СО	Colum	ins		
	•								BT	Busine	ess Tern	n	
									BP	Busine	ess Poli	су	
									ТА	Tags			-

Use the following options to work on the mind map:

View Counts (⁺¹)

Switch **View Counts** to ⁺¹ to view number of associations. For example, the following mind map displays the number of associations of the Northwind environment as two.



View Sensitive Data Indicator (ᅌ)

Use this switch to view sensitive data indicator of assets on the mind map.

View Sensitivity Data Classification (

Switch **View Sensitivity Data Classification** to **1** to view sensitive data classification of assets on the mind map.

For example, the following mind map displays sensitive data classifications of assets as Restri (restricted) and Confiden (Confidential).

Restri Holding	Data Warehouse->Valuation <	
Restri Account	TABLEAU->PRESENTATION LAYER	Confiden Data Mart

Switch to Enterprise Relationship Configuration (\mathcal{N})

Switch **Switch to Enterprise Relationship Configuration** to \mathcal{N} to view enterprise relationship configuration. The enterprise relationship configuration refers to the line color and type as configured in the Business Glossary Manager.

For example, the following mind map displays the relationship between business term and system in blue color and ZigZag type display.

TA		
Confiden	∫ BT	Banking and Financial Services>American Banker>Legal>Governmental Laws and Regulations www.www.www.www.www.www.www.www.www.ww
Data Mart	BR	Customer Rules Customer Zip Code cannot be empty

Include Relationships (V)

Switch Include Relationships to \checkmark to view relationships between assets on the mind map.

For example, the following mind map displays the relationships between assets.



Logical Names (A)

Switch **Logical Names** to \triangle to view logical names of associated tables and columns on the mind map.

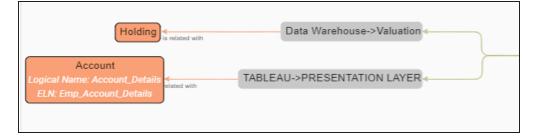
For example, the following mind map displays a logical name of a table.

Account Logical Name: Account_Details elated with	5

Expanded Object Logical Names (

Switch **Expanded Object Logical Names** to \triangle to view expanded logical names of associated tables and columns on the mind map.

For example, the following mind map displays expanded logical name of a table.



Legend (🔲)

Switch **Legend** to **E** to view legend of the mind map.

Overview (💻)

Switch **Overview** to **I** to view the overview of the mind map. You can slide the purple box to navigate across the mind map.



Expand All (

Use this switch to expand the nodes of the assets on the mind map.

Collapse All (붉片)

Use this switch to collapse the nodes of the assets on the mind map.

Export (💁)

Use this option to download the mind map in the XLSX or JPG format.

Filter (-)

Use this option to filter the mind map based on:

- Asset Type: You can exclude or include asset types from the mind map.
- Relationships: You can exclude or include assets based on relationships from the mind map.

Properties

Click an asset on the mind map to view its properties with association statistics under this pane. The properties of a technical asset differs from that of a business asset.

Reviewing and Rating Assets

You can review and rate technical assets under the Metadata module. Rating and reviewing an asset enables you to add 5-star rating and provide feedback for an asset. Also, the ratings are displayed for the asset in card view and grid view. To review and rate assets, follow these steps:

 In the <Technical_Asset> grid, click an asset. The <Technical_Asset_Name> page appears.

DETAILS ASSOCIATIONS	
Technical Details	
System Name	Primary Move Type (Source/Target)
Adventureworks	Both

2. Click $\star \star \star \star \star$.

The Reviews page appears. It displays reviews and ratings for an asset from all the users.

	dventureworks ★ ★ ★ ★ ★ (1 reviews)			WRITE A REVIEW
Revie	ews			
	Q	Sort by Most recent •	Ratings All ratings	v
AD	Rose Gold 11/29/2020 5:57 PM Administrator - Default System User			**** :
	Review Its perfect			

3. Click the Write A Review option.

The ratings page appears.

4. Enter appropriate values in the fields. Refer to the following table for field descriptions.

Filed Name	Description
	Specifies the rating of the asset.
Rating	To rate an asset, select an appro-
	priate star.
	Specifies the title of your review com-
	ments.
Title	For example: Well Documented Asset!
	Specifies the review comments.
Review	For example: The asset's technical and business properties are well doc- umented.

5. Click Save.

The ratings are displayed on the Reviews page.

Once the review is added, you can click to use the following options:

• Edit Review:

Use this option to update reviews and ratings for the asset.

Delete Review:

Use this option to delete the review.

You can also filter the reviews based on ratings and sort category.

•	lventureworks ★★★★ (1 reviews)			WRITE A REVIEW
Revie	ws			
	۵	Sort by Most recent	■ Ratings ■ All ratings	·
AD	Rose Gold			**** :
	11/29/2020 5:57 PM Administrator - Default System User			🎤 Edit review
	Its perfect			Delete review

Managing Access

You can manage access to technical assets in the following ways:

- Assigning roles
- Assigning users

Assigning Roles

To manage access via roles, follow these steps:

1. In the <Technical_Asset> page, click .

The available options appears.

System	IS					
Actions					System	Rating
•	•••	唹	Add to Todo Manage Access	1	3rd Party Flat Files	4 \star \star \star \star \star (1 reviews)
•	•••	办	€ ₽ :		Adventureworks	5 \star \star \star \star \star (1 reviews)

2. Click Manage Access.

The Manage Access pane appears. By default, it is set to Roles (🚈 🚢).

> Manage Access Banking and Finance	•••) .
Who would like to have access?		-
Roles	Ŧ	
No roles present		

3. Click 🐺.

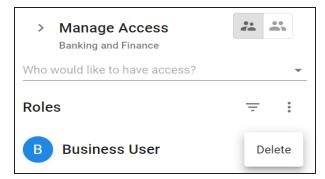
The available roles appears.

> Manage Access Banking and Finance	
Who would like to have access?	
Administrator	
Business User	
Power User	
public	

4. Select a role.

The selected role is assigned to the asset. All users assigned to this role get access to the asset.

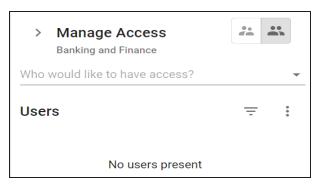
To revoke access of a role or delete it from the assigned roles list, click. Then, click **Delete**.



Assigning Users

To manage access via users, follow these steps:

1. In the Manage Access pane, switch to Users (👘 🖏).



2. Click 🔻.

The available users appear.

> Manage Access Banking and Finance	
Who would like to have access?	^
Administrator - Default System User	^
Pat	
public - Default User	
Sam	
Carao Oiba	-

3. Select a user.

The selected user is assigned to the asset.

To revoke access of a user or delete it from the assigned users list, list, click . Then, click **Delete**.

