



erwin Data Intelligence

Discover Assets Guide

Release v12.0

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Discovering Assets

To use data efficiently, it is important to be able to discover, access, and analyze it. The Discover Assets module (formerly known as erwin Business User Portal) provides business users and data governance teams with an easy way to discover data and collaborate on data assets. With flexible search and filter mechanisms, mind maps, lineage, impact, and data ratings, you can analyze data assets, improve data accessibility, promote collaboration, and make data governance decisions.

This section walks you through the process of discovering and analyzing technical and business assets in your organization.

Using Discover Assets

To access the Discover Assets module, go to **Application Menu > Discover Assets**. The Discover Assets dashboard appears:

erwin Data Intelligence
Discover Assets

Hello Administrator - Default System User, How can we help you?

Search for an asset or browse the Asset repository to find what you are looking for

All

1

Browse by Asset Repository

Systems (21)

Environments (36)

Tables (1383)

Columns (16586)

Mappings (108)

Business Terms (10234)

Business Policies (9)

Business Rules (18)

DS Agreements (1)

Issues (3)

Tags (3)

Compliance Reports (21)

Reports (2)

Browse by Asset Ratings

4 to 5 Star0

3 to 5 Star0

2 to 5 Star0

1 to 5 Star0

Browse By Tags

None28422

Sales1

Browse My Favorite Assets

No Favorite Assets Available

3

4

5

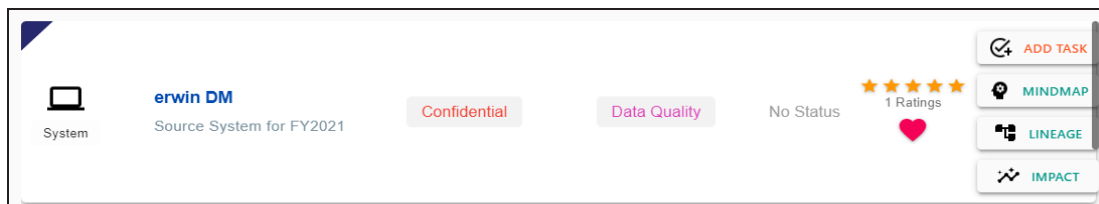
UI Section	Function
1-Search	Use this section to filter and search assets.
2-Browse by Asset	Use this section to browse by asset types. To browse by assets, click

Repository	the <Asset_Type> card.
3-Browse by Asset Ratings	Use this section to browse through assets based on asset ratings.
4-Browse by Tags	Use this section to browse through assets based on tags.
5-Browse My Favorite Assets	Use this section to browse through your favorite assets.

Discovering assets involves browsing and updating the following assets:

- [Systems](#)
- [Environments](#)
- [Tables](#)
- [Columns](#)
- [Mappings](#)
- [Business terms](#)
- [Business Policies](#)
- [Business Rules](#)

You can also enrich and analyze assets by:



- [Reviewing and rating assets](#)
- [Adding tasks](#)
- [Viewing mind maps](#)
- [Viewing lineage](#)
- [Viewing impact](#)
- [Viewing compliance reports](#)

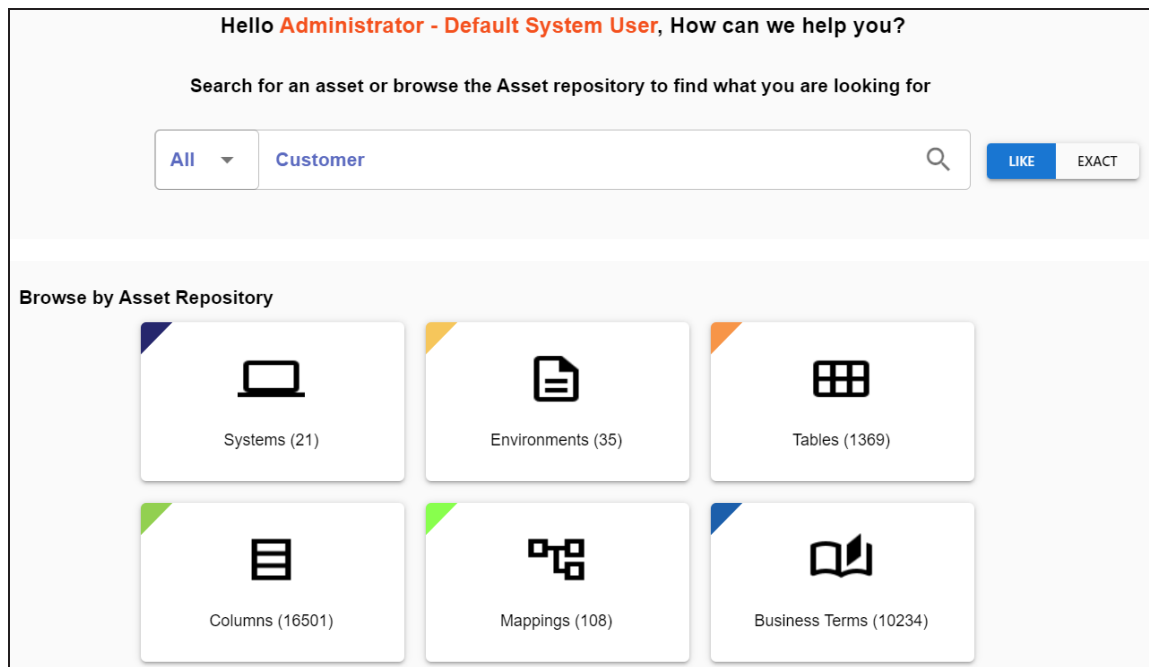
Searching and Filtering

For better and efficient asset discovery, the Discover Assets module provides extensive search and filter options.

To search and filter assets, follow these steps:

1. In the search box, type a keyword.

Two options, Like and Exact appear.




2. Use the Like or Exact option to narrow down the search result set.

Like

Use this option to get assets that match a portion of the search keyword.

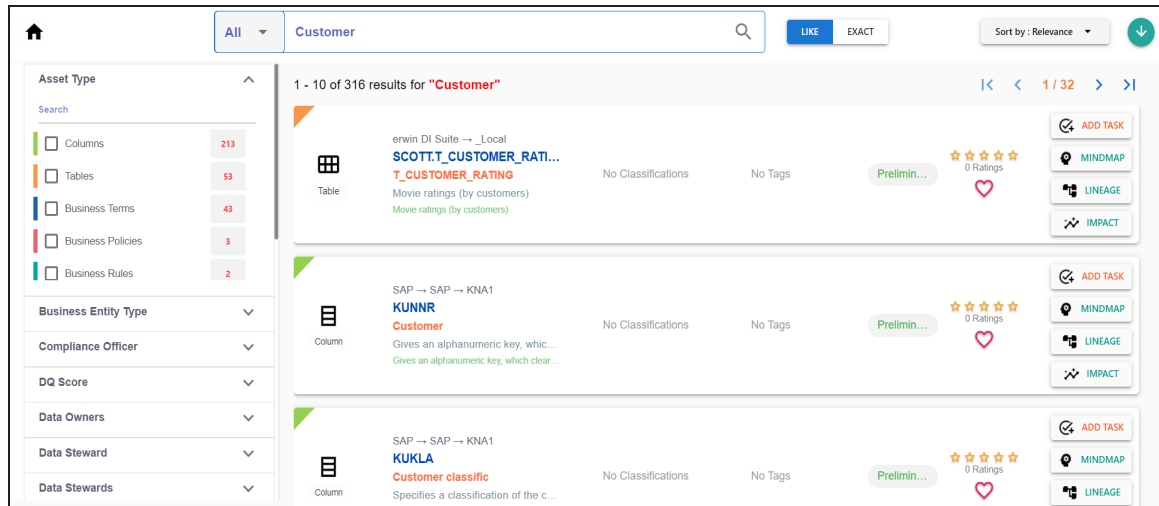
Exact

Use this option to get assets that exactly match the search keyword.

3. Click  or press Enter.

Based on your search criteria, search results appear.

For example, in the following image, 316 results are displayed for a Like search with a keyword, Customer.

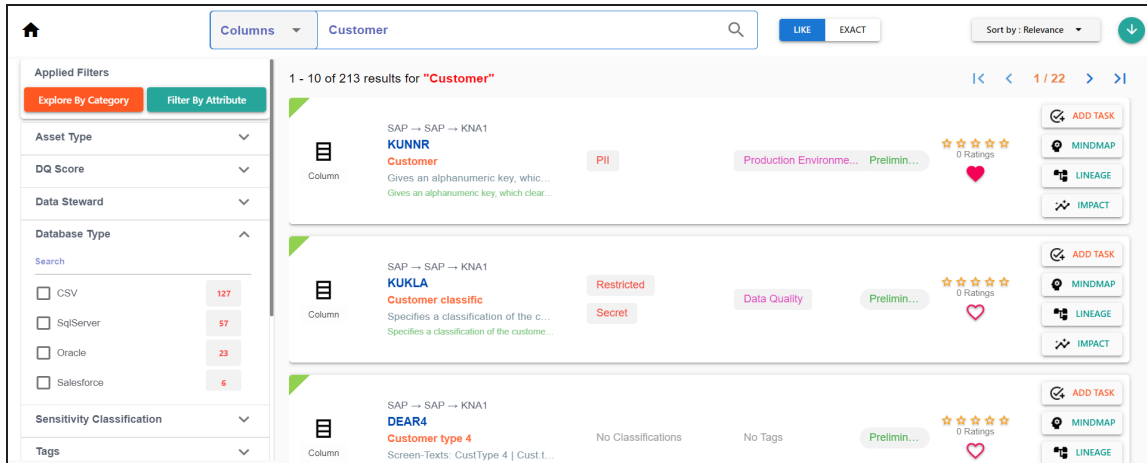


4. In the search box, click **All** to filter search results based on an asset types.

The list of available filters changes depending on asset type.

For example, for the keyword, Customer, and asset type, Column, the Like search displays 213 results. Apart from asset type, search results also display sensitivity classifications, tags, ratings, and workflow status.

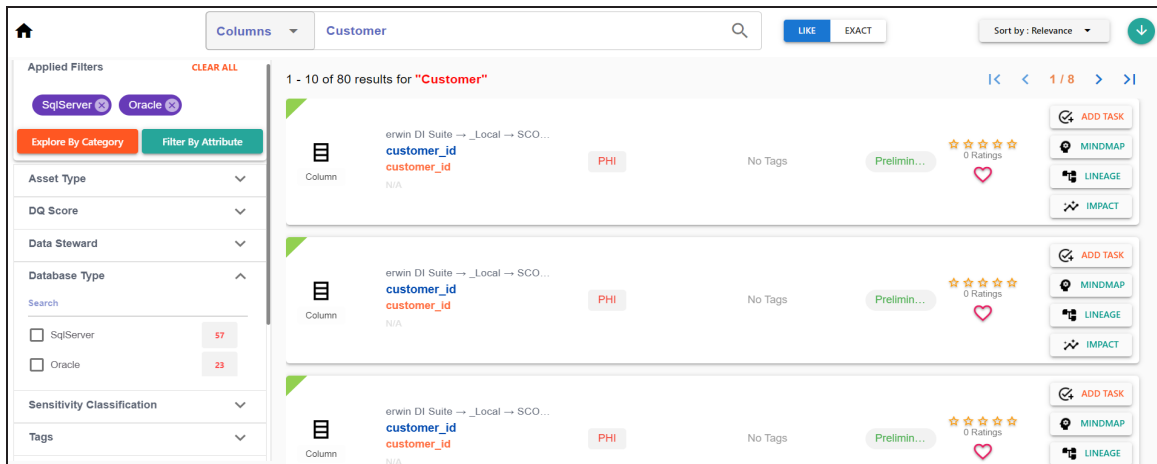
Executing a Like search for a column, produces results based on partial matches found in column name, logical column name, column definition, column comments, expanded logical name, and user-defined fields.



5. In the filters pane, under **Database Type**, select databases, and then click **Apply Filters**.

The selected databases are added in the Applied Filters list and matches based on these filters are displayed in the search results.

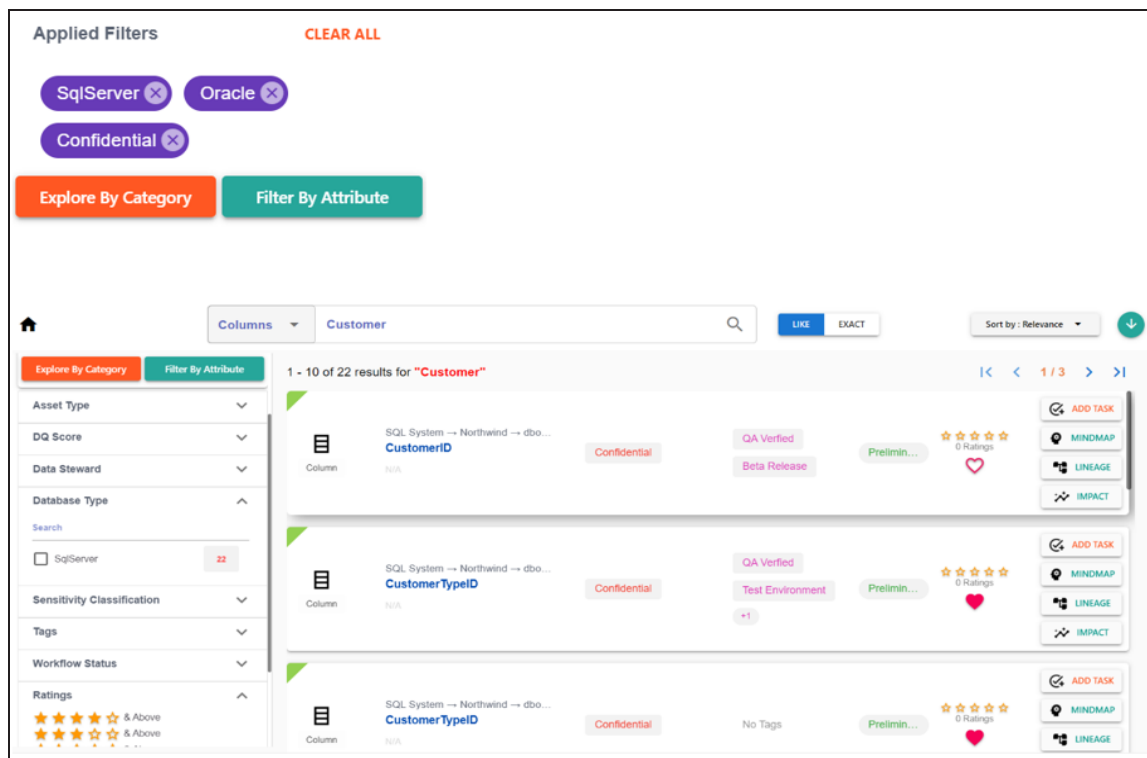
For example, in the following image, SqServer and Oracle are added to the Applied Filters list and the search result is narrowed down to 80 results.



6. Under **Sensitivity Classification**, select sensitivity tags, and then click **Apply Filters**.

The selected sensitivity tags are added to the Applied Filters list and matches based on these filters are displayed in the search results.

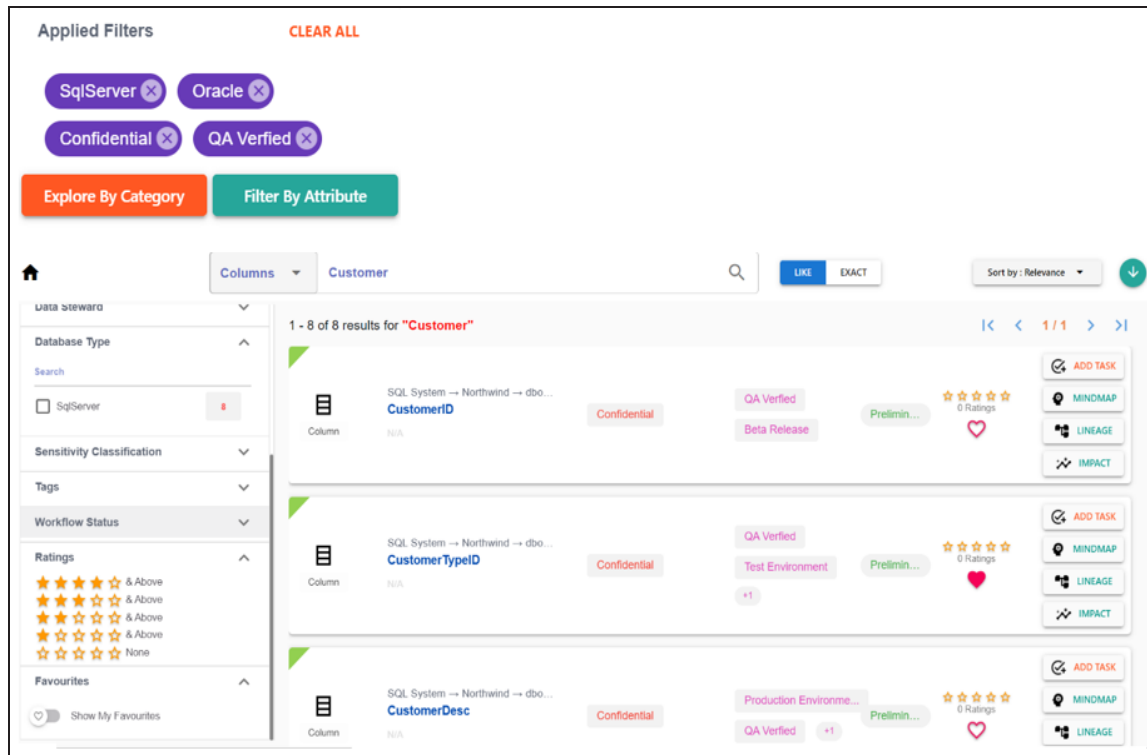
For example, in the following image, a sensitivity tag, Confidential, is added to the Applied Filters list and the search result is narrowed down to 22 records.



7. Under **Tags**, select user-defined tags, and then click **Apply Filters**.

The selected tags are added to the Applied Filters list and matches based on these filters are displayed in the search result.

For example, in the following image, a tag, QA Verified is added to the Applied Filters list and the search result is narrowed down to eight records.

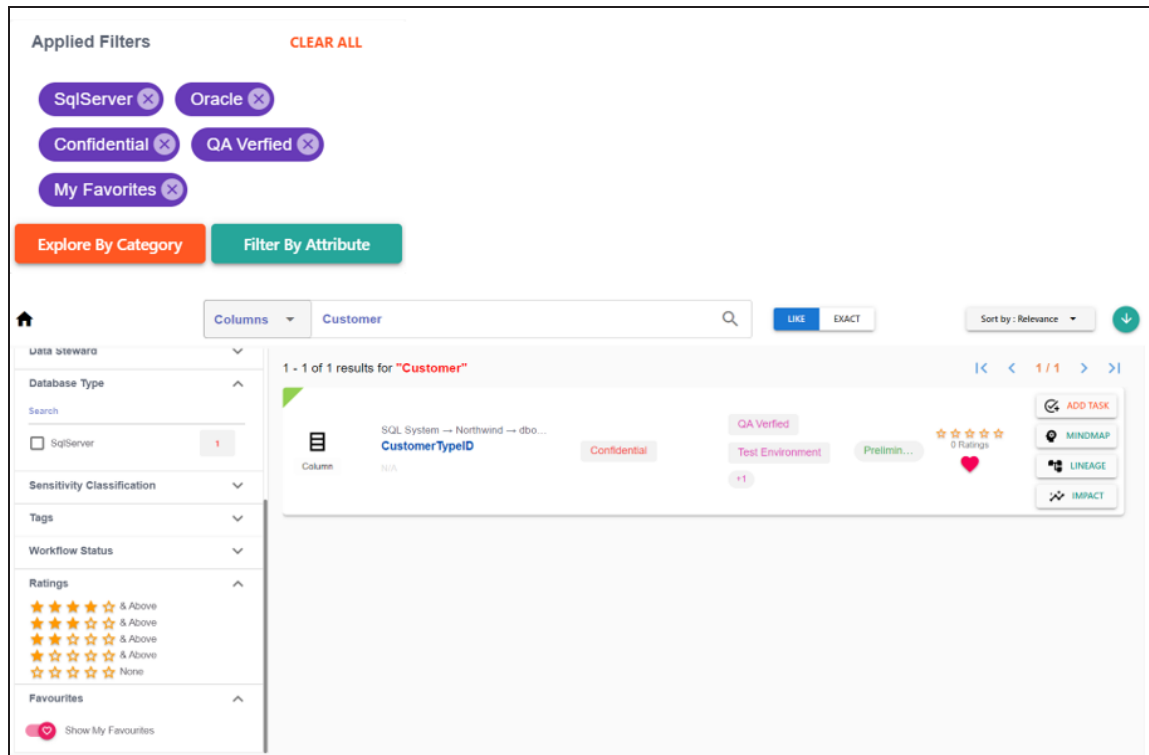


8. Switch **Show My Favorites** to on.

My Favorites is added to the Applied Filters list and matches based on these filters are displayed in the search result.

For example, in the following image, My Favorites is added to the Applied Filters list and the search result is narrowed down to one record.

Similarly, you can apply other filters available for an asset to narrow down search results.



9. Click <Asset_Name> to view asset properties.

For example, in the following image, column properties of a column, CustomerTypeID are displayed.

SQL System → Northwind → dbo.CustomerCustomerDemo

CustomerTypeID

Confidential

QA Verified

Test Environment

+1

10%

DQ Score

Mindmap

Lineage

Impact

Add Task

Update

Column

Column Properties

Related Assets

Additional Information

Rich Media Library

Business Information

Data Steward

Logical Name

CustomerClassificationNumber

Definition

This column identifies a customer by its classification.

Comments

It is undergoing QA process.

Created By

Administrator - Default System User on 02/26/2020 03:57:43

Last Modified By

Administrator - Default System User on 04/11/2022 07:34:31

Column Properties

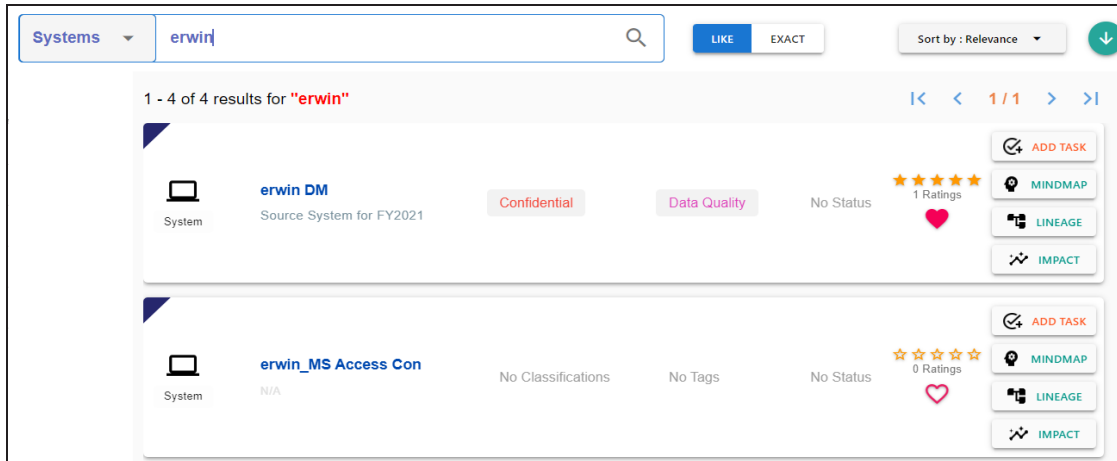
Data Type	nchar
Length	10
Precision	2
Scale	5
Nullable Flag	No
Primary Key Flag	Yes

Systems

You can browse through the systems available in your ecosystem using the Discover Assets module. The list of systems facilitates access to system lineage, impact, environments, mind map, and associations, all in one place.

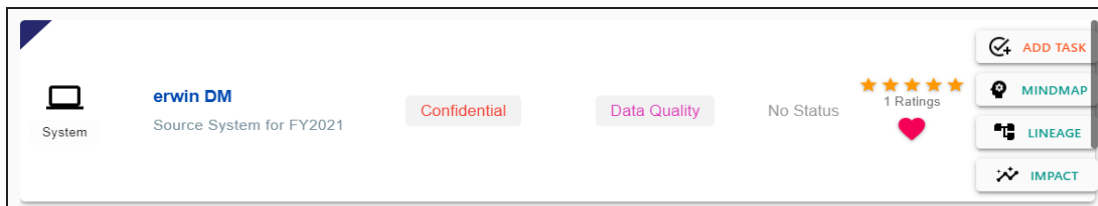
To view the systems list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Systems** card.

A list of systems appears. Use the search box to find the required system from the list.



Alternatively, on the search box, click **All**, and then click **Systems**.

On each system tile, you can view information, such as - business purpose, classification, tags, status, rating, and favorites. Apart from this, you can add corresponding tasks, and view mind maps, lineage, and impact.



System Details

System details include business purpose, list of environments, audit history, and so on.

To view system details, in the system list, click <System_Name>.

The System page appears. By default, the Details tab opens.

For example, the following image shows details of the erwin DM system. This system's sensitivity classification is Confidential, and it is tagged with Data Quality.

Details

Related Assets

Rich Media Library

Business Information

Business Purpose

Source System for FY2021

Other Information

Text Box

50

Text Box1

RESOURCEEMAIL_New

Related Assets

A system can be associated with other technical and business assets.

To view associations of systems, click the **Related Assets** tab.

The list of associated assets appears.

For example, in the following image, erwin DM is associated with two business terms.

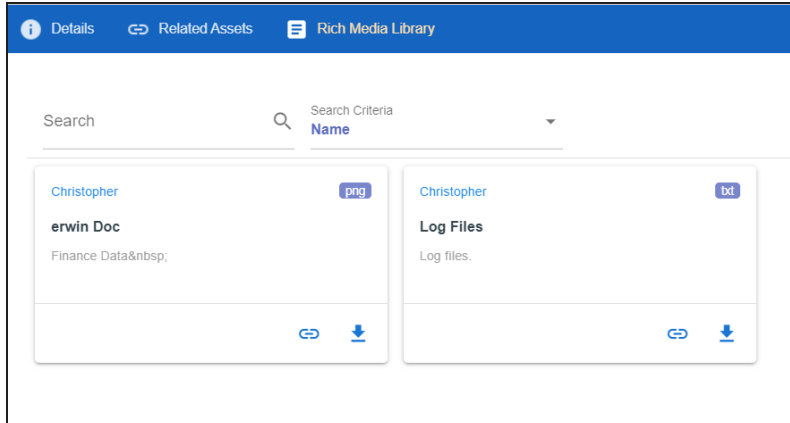
Details Related Assets Rich Media Library			
Business Term(2)			
#	Asset Name	Definition	Description
1	Agile Testing	software testing practice that follows the principles of agile software development is called Agile Testing. Agile is an iterative development methodology, where requirements evolve through collaboration between the customer and self-organizing teams and agile aligns development with customer needs.	Testing is NOT a Phase: Agile is the only way to ensure continuous p Testing Moves the project Forward considered as quality gate but at the product meets the business r
2	3 -Hydroxyl End	The hydroxyl group that is attached to the 3 carbon atom of the sugar (ribose or deoxyribose) of the terminal nucleotide of a nucleic acid molecule.	LEN(D3)

Rich Media Library

A system can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view or download these artifacts using the Rich Media Library tab.

To view or download the supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link ()

Use this option on a card to open the URL related with a media.

Preview ()

Use this option on a card to download the media file.

Apart from details, related assets, and media, you can view mind maps, lineage, and impact. You can also add tasks and update systems. Use the following options:

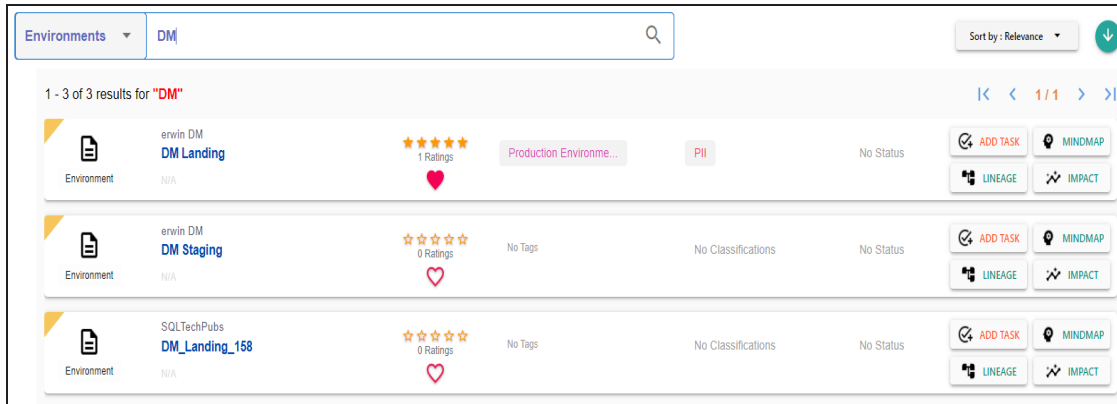
- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace system's origin and destination after source to target mappings. For more information on lineage, refer to the [Viewing Lineage](#) topic.
- **Impact:** Use this option to analyze the impact of a system as source and target. For more information on impact, refer to the [Viewing Impact](#) topic.
- **Add Task:** Use this option to add tasks related to a system. For more information on adding tasks, refer to the [Adding Tasks](#) topic.
- **Update:** Use this option to update system details. This opens the Metadata Manager. For field descriptions, refer to the [Creating Systems](#) topic.

Environments

You can browse through the environments available in your ecosystem using the Discover Assets module. The list of environments facilitates access to environments lineage, impact, tables, mind map, and associations, all in one place.

To view the environment list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Environments** card.

A list of environments appears. Use the search box to find the required environment from the list.



Alternately, on the search box, click **All**, and then click **Environments**.

On each environment tile, you can view information, such as - business purpose, classification, tags, status, rating, and favorites. Apart from this, you can add corresponding tasks, and view mind maps, lineage, and impact.

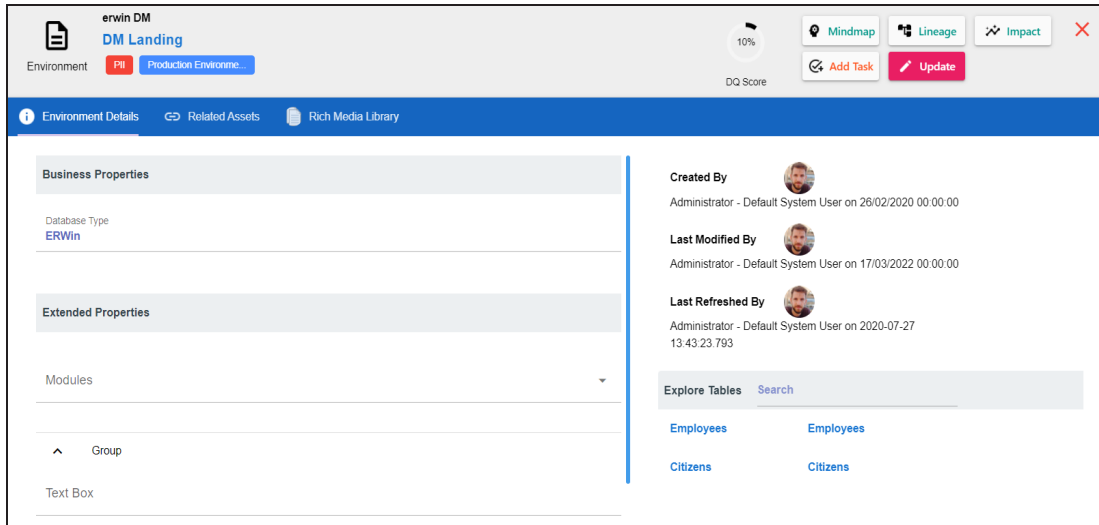
Environment Details

Environment details include database type, list of tables, audit history, and so on.

To view environment details, in the environment list, click <Environment_Name>.

The Environment page appears. By default, the Details tab opens.

For example, the following image shows details of the DM Landing environment. This environment's sensitivity classification is PII, DQ score is 10%, and it is tagged with Production Environment.



Related Assets

An environment can be associated with other technical and business assets.

To view associations of environments, click **Related Asset** tab.

The list of associated assets appears.

For example, in the following image, DM Landing is associated with two business terms.

The screenshot shows the 'erwin DM Landing' page with the 'Related Assets' tab selected. The table below lists the associated business terms.

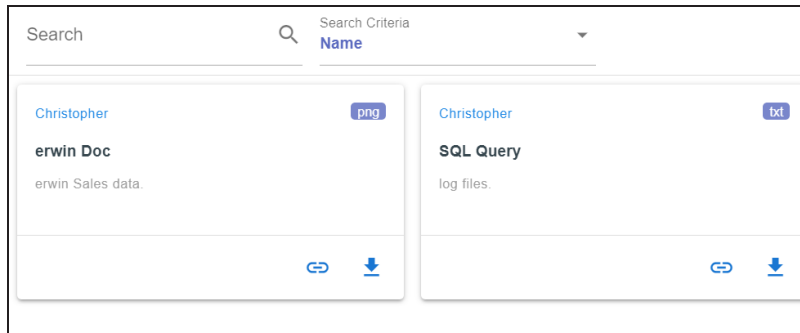
#	Asset Name	Definition	Description	Catalogname	Catalog Hierarchy	Relationship Name
1	CURRENCY	<div><div>COD Currency</div></div>	<div><div>COD Currency</div></div>		Customer Master Catalog	Golden Source for
2	CUSTOMER	<div><div>a person who buys your product</div></div>	<div><div>a person who buys your product</div></div>		Customer Master Catalog	Golden Source for

Rich Media Library

An environment can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view or download these artifacts using the Rich Media Library tab.

To view or download supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link (🔗)

Use this option on a card to open the URL related with a media.

Preview (📄)

Use this option on a card to download the media file.

Apart from details, related assets, and media, you can view mind maps, lineage, and impact. You can also add tasks and update systems. Use the following options:

- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace environment's origin and destination after source to target mappings. For more information on lineage, refer to the [Viewing Lineage](#) topic.

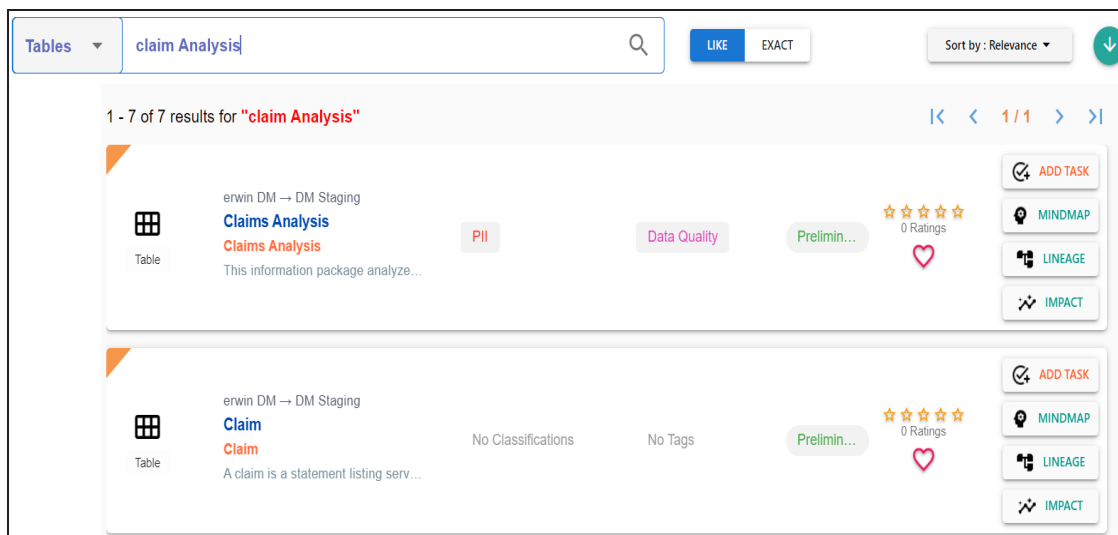
- **Impact:** Use this option to analyze the impact of an environment as source and target. For more information on impact, refer to the [Viewing Impact](#) topic.
- **Add Task:** Use this option to add tasks related to an environment. For more information on adding tasks, refer to the [Adding Tasks](#) topic.
- **Update:** Use this option to update environment details. This opens the Metadata Manager.

Tables

You can browse through the tables available in your and view a list of all the tables. It gives you access to view lineage, impact, columns, mind map, and properties of a table.

To view the tables list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Tables** card.

A list of tables appears. Use the search box to find the required table.



Alternately, on the search box, click **Tables**.

On each table tile, you can view information, such as business purpose, classification, tags, status, rating, and favorites. Apart from this, you can corresponding add tasks, and view mind maps, lineage, and impact.

Table Properties

Table properties include logical name, list of columns, audit history, and so on.

To view table properties, in the table list, click <Table_Name>.

The Table page appears. By default, the Properties tab opens.

For example, the following image shows properties of the Claims Analysis. This table's sensitivity classification is PII, DQ score is 10%, and it is tagged with Data Quality.

erwin DM - DM Staging
Claims Analysis
Table PII Data Quality

10%
DQ Score

Mindmap Lineage Impact
Add Task Update

Table Properties Related Assets Additional Information Rich Media Library

Business Properties

Logical Name
Claims Analysis

Definition
This information package analyzes claims by time, member, and claim.

Extended Properties

SQL Query
ALTER TABLE Claims Analysis ADD Email varchar(255);

Created By
Administrator - Default System User on 26/02/2020 00:00:00

Last Modified By
Administrator - Default System User on 22/03/2022 00:00:00

Explore Columns Search

Claim Surrogate...	Claim Surrogate...	()
Date Identifier	Date Identifier	()
Member Key	Member Key	()
Claim Count	Claim Count	()
Claim Amount US...	Claim Amount US...	()
Claim Surrogate...	Claim Surrogate...	()
Date Identifier	Date Identifier	()
Member Key	Member Key	()

Related Assets

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** page, click **Related Assets**.

The list of associated assets appears.

For example, in the following image, the Claims Analysis table is associated with two business terms.

The screenshot shows the 'erwin DM -- DM Staging' interface for the 'Claims Analysis' table. The top navigation bar includes 'Table', 'PII', and 'Data Quality' tabs. A 'DQ Score' of 10% is displayed. The main content area is titled 'Business Term (2)' and contains a table with two rows of business terms.

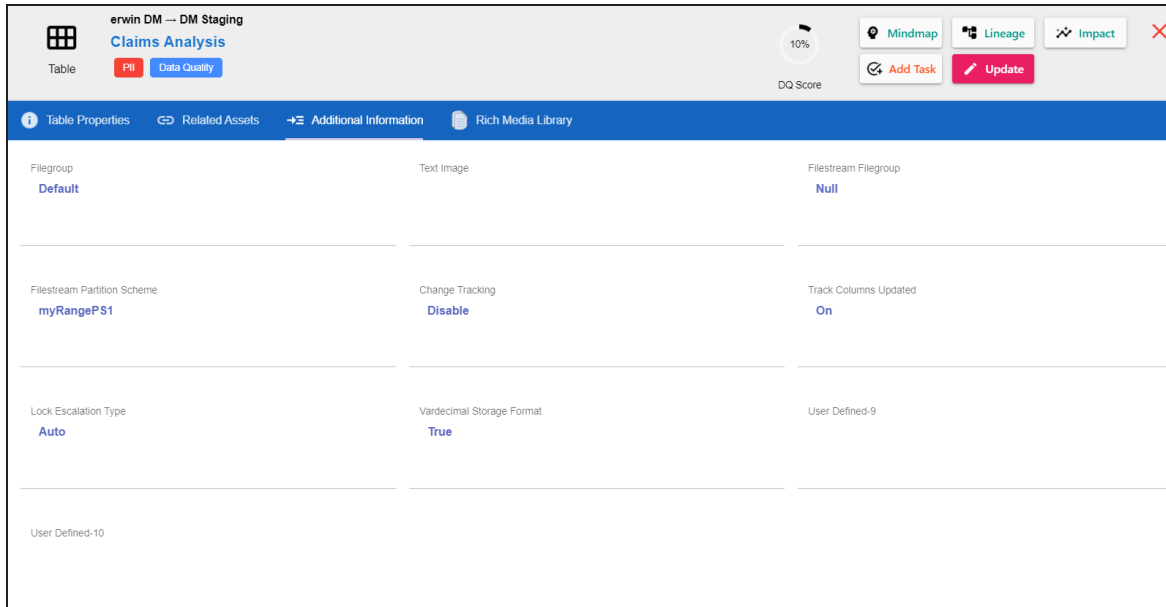
#	Asset Name	Definition
1	Acceptance Test	(IEEE) Testing conducted to determine whether or not a system satisfies its acceptance criteria and to enable the customer to determine whether or not to accept the system.
2	GDPR	EU General Data Protection Regulation (GDPR) replaces the Data Protection Directive 95/46/EC and was designed to harmonise data privacy laws across Europe, to protect and empower all EU citizens data privacy, and to restrict the movement of personal data to countries outside the EU.

Additional Information

Additional information includes user defined fields configured for a table. Ensure that these fields are displayed for tables under the Properties tab in Metadata Manager. For more information on displaying user defined fields, refer to the [Displaying User Defined Fields](#) topic.

With Language Settings, you can set UI labels of user defined fields. Use Table Metadata section under User Defined Flex Fields to configure these UI labels. For more information, refer to the [Configuring Language Settings](#) topic.

The following image, displays the user defined fields configured for a table.

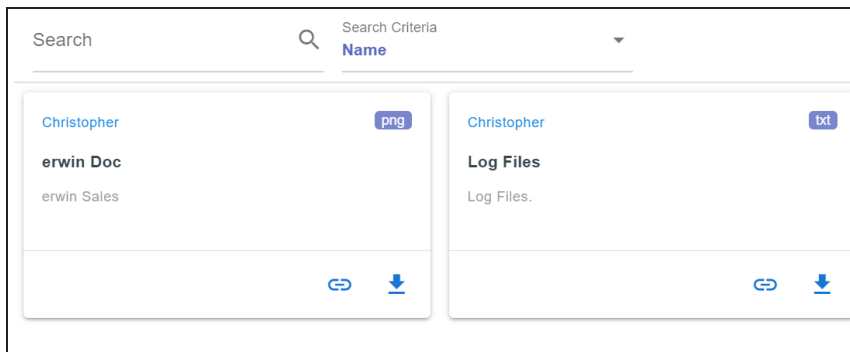


Rich Media Library

A table can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view and download these artifacts using **Rich Media Library** tab.

To view or download supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link ()

Use this option on a card to open the URL related with a media.

Preview ()

Use this option on a card to download the media file.

Apart from details, related assets, and media, you can view mind maps, lineage, and impact. You can also add tasks and update systems. Use the following options:

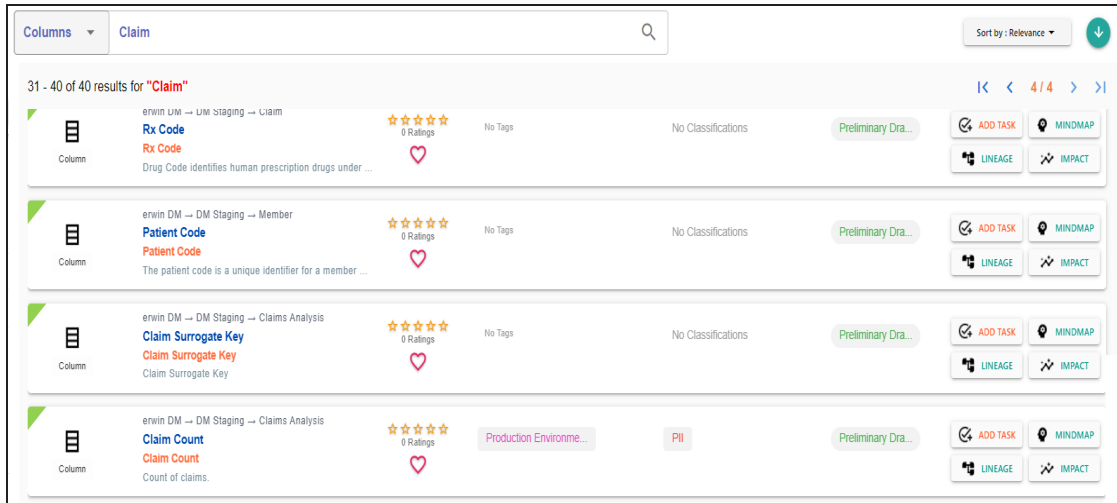
- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace table's origin and destination after source to target mappings. For more information on lineage, refer to the [Viewing Lineage](#) topic.
- **Impact:** Use this option to analyze the impact of a table as source and target. For more information on impact, refer to the [Viewing Impact](#) topic.
- **Add Task:** Use this option to add tasks related to a table. For more information on adding tasks, refer to the [Adding Tasks](#) topic.
- **Update:** Use this option to update table details. This opens the Metadata Manager.

Columns

You can browse through the columns available in your ecosystem using the Discover Assets module. The list of columns facilitates access to column lineage, impact, mind map, column properties, and associations, all in one place.

To view the columns list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Columns** card.

A list of columns appears. Use the search box to find the required column from the list.



Alternately, on the search box, click **All**, and then click **Columns**.

On each column tile, you can view information, such as business purpose, classification, tags, status, rating, and favorites. Apart from this, you can corresponding add tasks, and view mind maps, lineage, and impact.

Details

Details include logical name, list of technical properties, audit history, and so on.

To view details, on the column list, click <Column_Name>.

The Column page appears. By default, the details tab opens.

For example, the following image shows details of the Claim Count column. This column's sensitivity is PII, DQ score is 10%, and it is tagged with Production Environment.

Business Properties

Logical Name

Claim Count

Definition

Count of claims.

Extended Properties

SQL Query

ALTER TABLE Claims Analysis ADD Claim Count int;

Related Assets

A column can be associated with other technical and business assets.

To view associations of columns, click the **Related Assets** tab.

The list of associated assets appears.

For example, in the following image, the Claim Count column is associated with a business term and a business policy.

erwin DM -- DM Staging -- Claims Analysis

Claim Count

10%

Mindmap

Lineage

Impact

Column

PDI

Production Environment...

DQ Score

Add Task

Update

Column Properties

Related Assets

Additional Information

Rich Media Library

Business Term (1)

Business Policy (1)

#	Asset Name	Definition
1	GDPR	EU General Data Protection Regulation (GDPR) replaces the Data Protection Directive 95/46/EC and was designed to harmonise data privacy laws across Europe, to protect and empower all EU citizens data privacy, and to...

1-1 of 1 < >

Additional Information

Additional information includes user defined fields configured for a column. Ensure that these fields are displayed for columns under the Properties tab in Metadata Manager. For more information on displaying user defined fields, refer to the [Displaying User Defined Fields](#) topic.

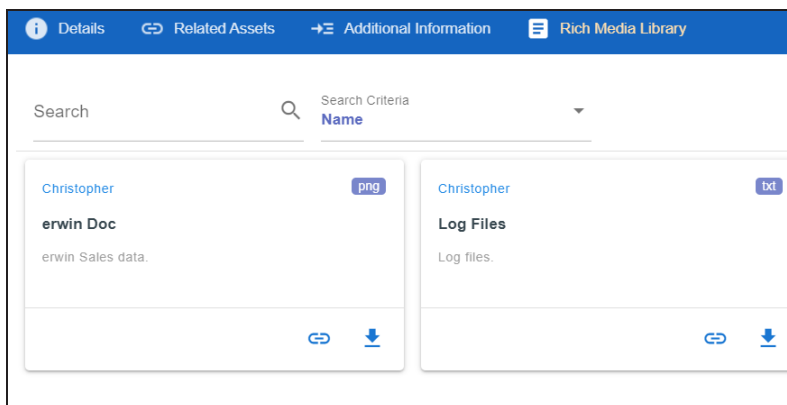
With Language Settings, you can set UI labels of user defined fields. Use Column Metadata section under User Defined Flex Fields to configure these UI labels. For more information, refer to the [Configuring Language Settings](#) topic.

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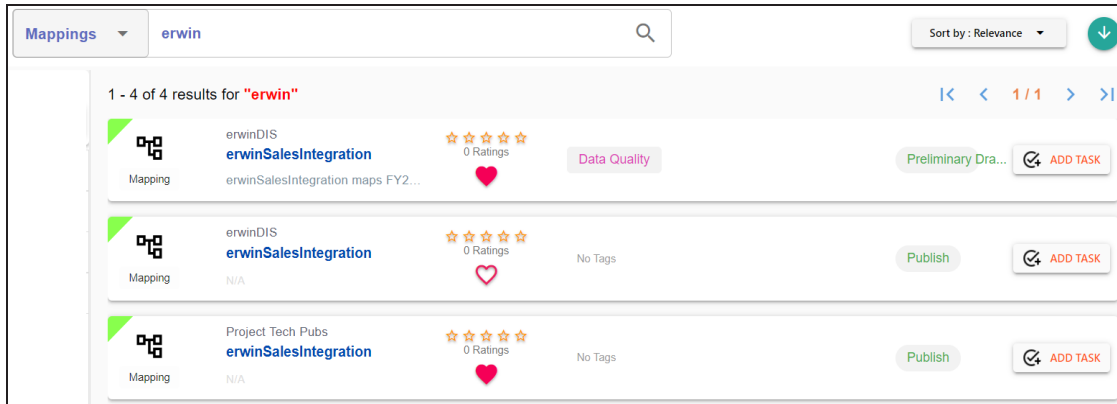
- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace column's origin and destination after source to target mappings. For more information on lineage, refer to the [Viewing Lineage](#) topic.
- **Impact:** Use this option to analyze the impact of a column as source and target. For more information on impact, refer to the [Viewing Impact](#) topic.
- **Add Task:** Use this option to add tasks related to a column. For more information on adding tasks, refer to the [Adding Tasks](#) topic.
- **Update:** Use this option to update column details. This opens the Metadata Manager.

Mappings

You can browse through the mappings available in your ecosystem using the Discover Assets module. The list of systems facilitates access to view and update details of a mapping, all in one place.

To view the mappings list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Mappings** card.

A list of mappings appears. Use the search box to find the required mapping from the list.



Alternately, on the search box, click **All**, and then click **Mappings**.

On each mappings tile, click <Mapping_Name>. The mapping page appears. You can view the mapping information with respect to the following tabs:

Tab	Description
Map Spec Overview	Under this, you can view map details, workflow status, and audit history of a map.
Map Spec Grid	Under this, you can analyze mapping specifications and view its source, target, and transformation details.
Graphical Designer	Under this, you can view source to target mappings in a graphical view.
Source Extract SQL	Under this, you can view: <ul style="list-style-type: none"> SQL Query relevant to a mapping specification SQL Query Description
Target Update Strategy	Under this, you can view target update strategy of a map.
Testing Notes	Under this, you can view relevant testing notes with respect to a mapping specification.
Map Specs Docs	Under this, you can view the uploaded documents related to a mapping specification.
Assignment	Under this, you can view users assigned to a mapping specification.
Release Information	Under this, you can view release information of a mapping.

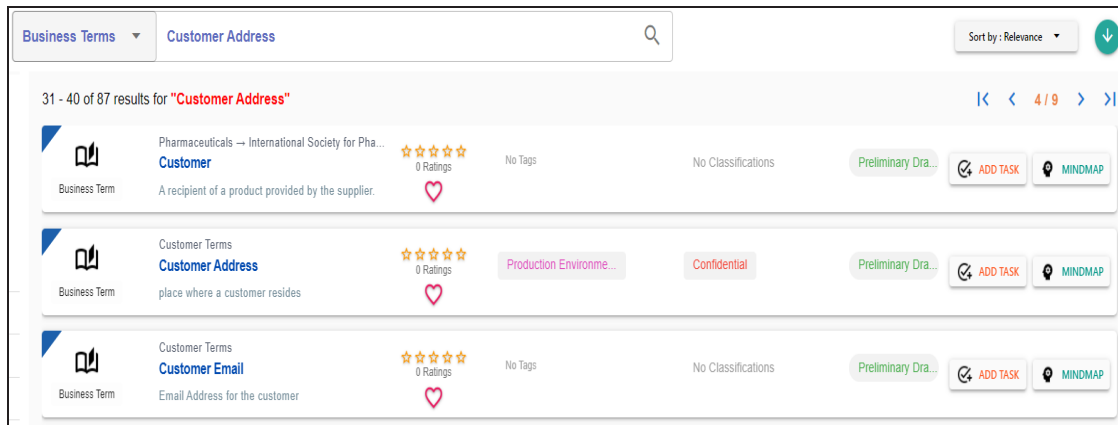
Tab	Description
User Defined Tabs (1-5)	Under this, you can view user defined fields configured for a map. These can be used by you with your own UI labels .
Extended Properties	Under this, you can view extended properties configured for a mapping specification.

Business Terms

You can browse through the business terms available in your ecosystem using the Discover Assets module. The list of business terms facilitates mind map, and associations of a business term, all in one place.

To view the business terms list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Business Terms** card.


A list of business terms appears. Use the search box to find the required business term from the list.



Alternately, on the search box, click **All**, and then click **Business Terms**.

On each business term tile, you can perform the following tasks with respect to a business term:

- [Add task](#)
- [View mind map](#)

In addition to the above tasks, on the business term list, you can click  for a business term to mark it as favorite.

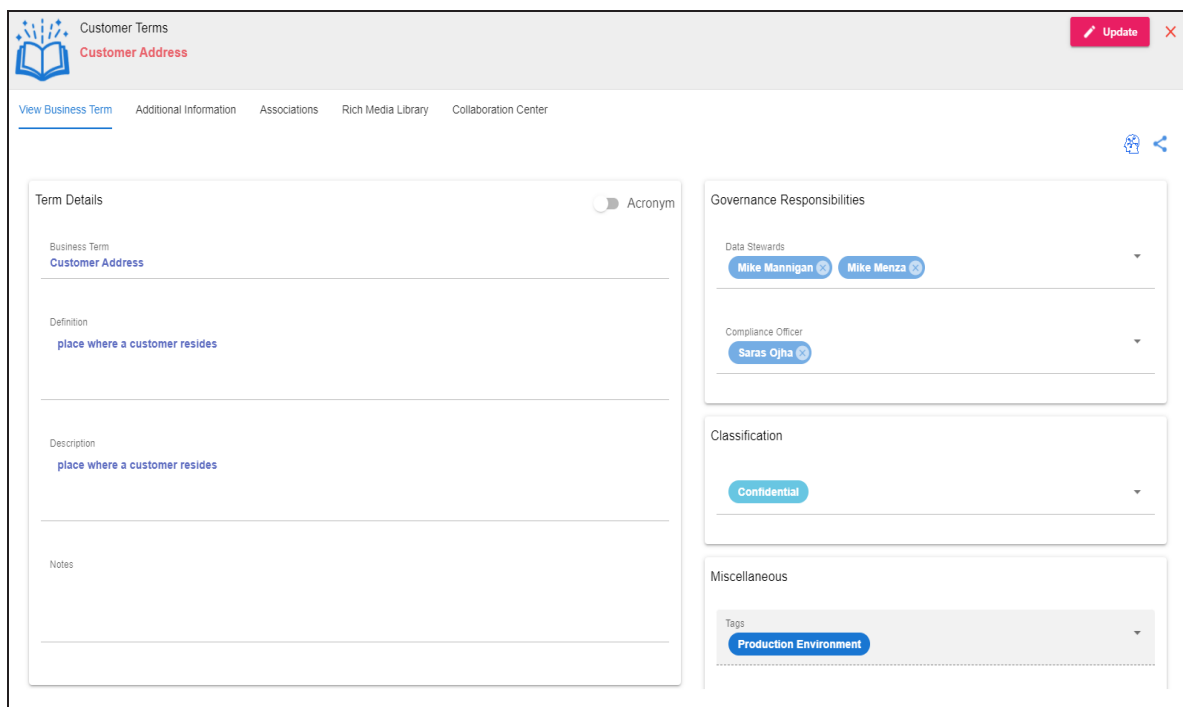
View Business Term

The View Business Term tab includes term details, governance responsibilities, audit history, and so on.

To access the View Business Term tab, on the business term list, click <Business_Term>.

The <Business_Term> page appears. By default, the View Business Term tab opens.

For example, in the following image, details of the Customer Address business term appears. This business term's sensitive classification is Confidential, and it is tagged with Production Environment. The Term Details section displays a business term's name, definition, and description. The Governance Responsibilities section displays the data governance assignments.



The screenshot shows the 'View Business Term' page for the 'Customer Address' business term. The page has a header with the 'Customer Terms' title and a red 'Update' button. Below the header is a navigation bar with tabs: 'View Business Term' (selected), 'Additional Information', 'Associations', 'Rich Media Library', and 'Collaboration Center'. The main content area is divided into two columns. The left column, titled 'Term Details', contains a toggle for 'Acronym' and sections for 'Business Term' (Customer Address), 'Definition' (place where a customer resides), 'Description' (place where a customer resides), and 'Notes'. The right column contains sections for 'Governance Responsibilities' (listing Data Stewards: Mike Mannigan and Mike Menza, and Compliance Officer: Saras Ojha), 'Classification' (Confidential), and 'Miscellaneous' (listing Tags: Production Environment).

Additional Information

With Language Settings, you can set UI labels of user defined fields for business terms. Use Business Terms User Defined Fields section under Business Glossary Manager to configure these UI labels. For more information, refer to the [Configuring Language Settings](#) topic.

To view additional information of business terms, on the **<Business_Term>** page, click the **Additional Information** tab

For example, the following image, displays the user defined fields, Articulation Score, KPI, and Attribute configured for a business term.

The screenshot shows a web interface for 'Customer Terms'. At the top, there's a header with a book icon, the text 'Customer Terms', and a sub-header 'Customer Address'. A red 'Update' button is in the top right. Below the header is a blue navigation bar with tabs: 'View Business Term', 'Additional Information' (selected), 'Associations', 'Rich Media Library', and 'My Action Center'. The main content area displays three user-defined fields in a two-column layout:


Field Name	User Defined Field
Articulation Score 80 %	User Defined 6
KPI Number of Calls per subscriber.	User Defined 7
Attribute Goods and Services	User Defined 8

Associations

A business term 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 business terms, on the **<Business_Term>** page, click the **Associations** tab.

The list of associated assets appears. For example, in the following image the business term Customer Address is associated with another business term, Customer, two tables, and two columns.

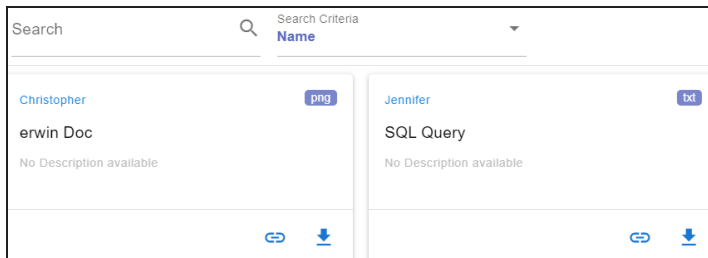
Customer Terms						
Customer Address						
<div>  </div>						
<div> View Business Term Additional Information Associations Rich Media Library My Action Center </div>						
<div> Business Term(2) Table(2) Column(2) </div>						
#	Asset Name	Definition	Description	Catalogname	Catalog Hierarchy	Relationship Name
1	CUSTOMER	a person who buys your product	a person who buys your product	Customer Master Catalog	Customer Master Catalog	is Synonymous with
2	CUSTOMER	a person who buys your product	a person who buys your product	Customer Master Catalog	Customer Master Catalog	is Child Of

Rich Media Library

A business term can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view or download these artifacts using the Rich Media Library tab.

To view or download supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link ()

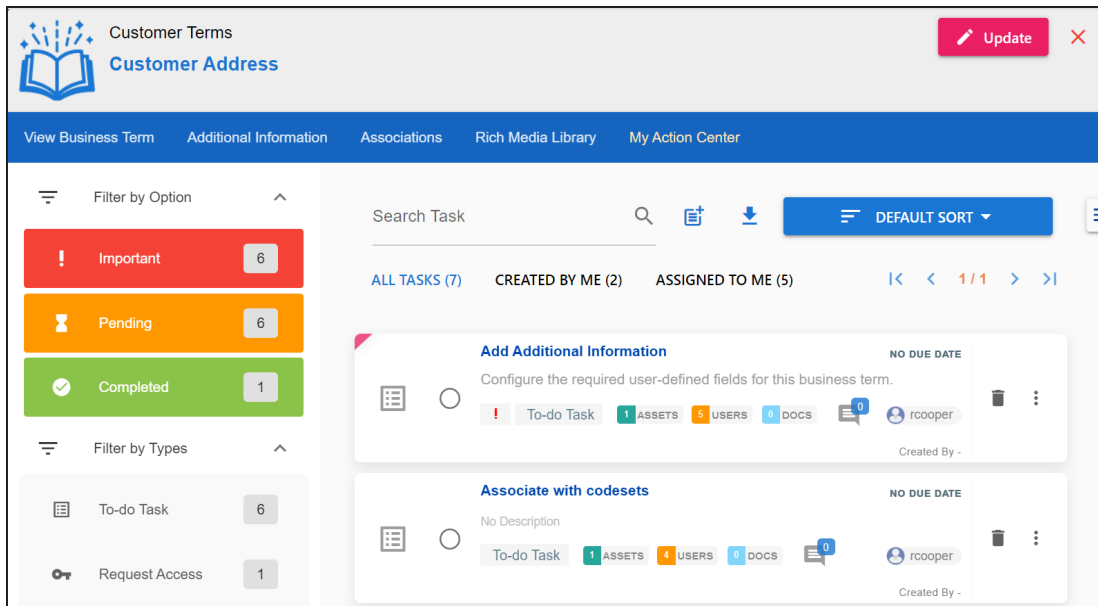
Use this option on a card to open the URL related with a media.

Preview ()

Use this option on a card to download the media file.

My Action Center

With My Action Center, you can view all the tasks related to a business term and manage tasks created or assigned to you. For more information on using My Action Center, refer to the [Using My Action Center](#).

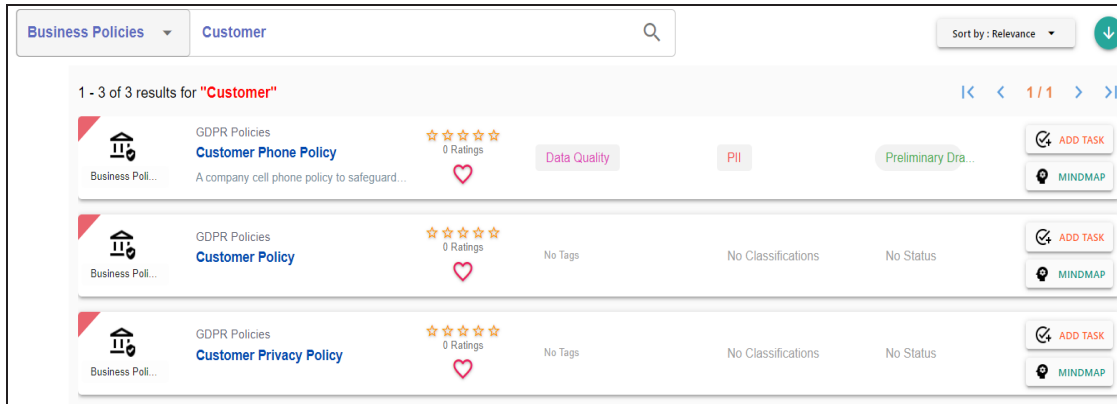


Business Policies

You can browse through the business policies available in your ecosystem using the Discover Assets module. The list of business policies facilitates access to view mind map, and associations of a business policy, all in one place.

To view the business policies list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Business Policies** card.


A list of business policies appears. Use the search box to find the required business policy from the list.



Alternately, on the search box, click **All**, and then click **Business Policies**.

On each business policy tile, you can perform the following tasks with respect to a business policy:

- [Add task](#)
- [View mind map](#)

In addition to the above tasks, on the business policy list, you can click  for a business policy to mark it as favorite.

View Business Policy

The View Business Policy tab includes policy details, governance responsibilities, audit history, and so on.

To access the View Business Policy tab, on the business policy list, click <Business_Policy>.

The <Business_Policy> page appears. By default, the View Business Policy tab opens.

For example, in the following image, details of the Customer Phone Policy appears. This business policy's sensitive classification is PII, and it is tagged with Data Quality. The Policy Details section displays a business policy's name, definition, and description. The Governance Responsibilities section displays the data governance assignments.

GDPR Policies

Customer Phone Policy

Update

View Business Policy

Additional Information

Associations

Rich Media Library

My Action Center

Policy Details

Business Policy

Customer Phone Policy

Definition

A company cell phone policy to safeguard personal data of a customer's phone.

Description

Customer's cell phone holds some of the most sensitive, personal information. Things like their passwords and account numbers, emails, text messages, photos, and videos. If customer's phone ends up in the wrong hands, someone could steal their identity, buy stuff with their money, or hack into their email or social media

Governance Responsibilities

Technical Data Steward

Joey Wilson

Policy Expiry

Expiry Type

Limited Duration

Policy Start Date

03-28-2022 23:56

Additional Information

With Language Settings, you can set UI labels of user defined fields for business policies. Use Business Policies User Defined Fields section under Business Glossary Manager to configure these UI labels. For more information, refer to the [Configuring Language Settings](#) topic.

To view additional information of business policies, on the **<Business_Policy>** page, click the **Additional Information** tab

For example, the following image, displays the user defined fields, Articulation Score, KPI, and Attribute configured for a business policy.

GDPR Policies

Customer Phone Policy

Update

View Business Policy

Additional Information

Associations

Rich Media Library

My Action Center

Articulation Score

75%

User Defined 6

KPI

No. of valid phone numbers.

User Defined 7

Attribute

Telecom

User Defined 8

Associations

A business policy 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 business policies, on the **<Business_Policy>** page, click the **Associations** tab.

The list of associated assets appears. For example, in the following image the business policy, Customer Phone Policy is associated with another business term, GDPR, two business rules, and one column.

GDPR Policies

Customer Phone Policy

Update

View Business Policy

Additional Information

Associations

Rich Media Library

My Action Center

Business Term(1)

Business Rule(2)

Column(1)

#

Asset Name

Definition

1

GDPR

EU General Data Protection Regulation (GDPR) replaces the Data Protection Directive 95/46/EC and was designed to harmonise data privacy laws across Europe, to protect and

Rich Media Library

A business policy can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view or download these artifacts using the Rich Media Library tab.

To view or download supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.

GDPR Policies

Customer Phone Policy

View Business Policy

Additional Information

Associations

Rich Media Library

My Action Center

Search

Search Criteria

Name

Christopher

erwin Doc

Complete snapshot of Customer Phone Policy.

🔗

⬇️

Christopher

SQL Query

Customer Phone Policy details.

🔗

⬇️

Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link ()

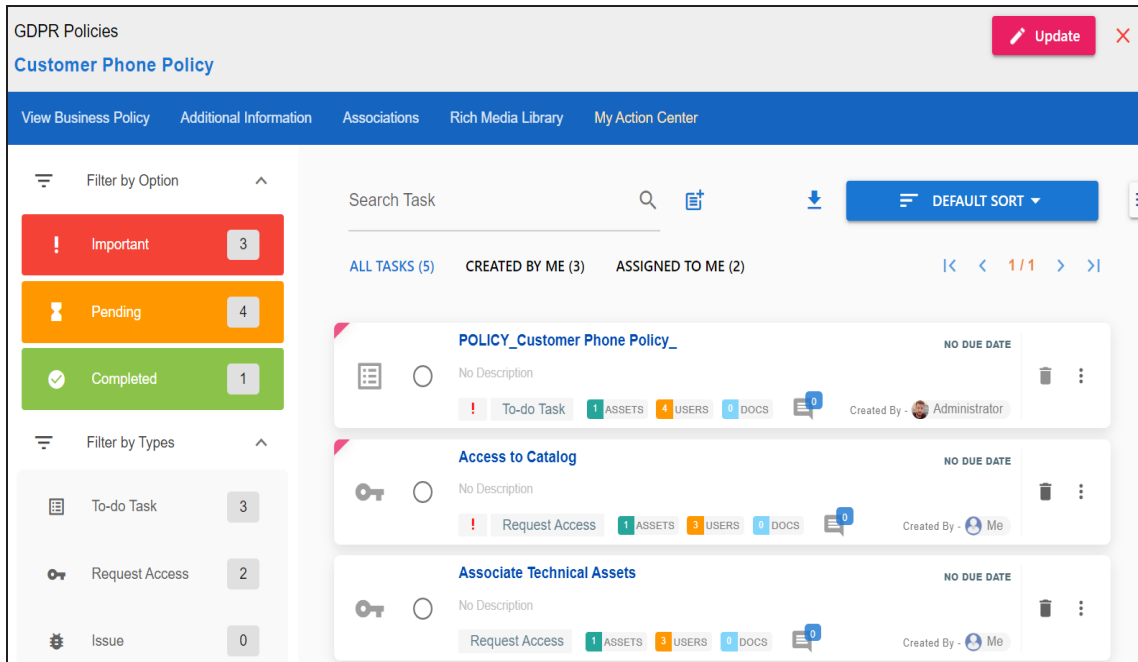
Use this option on a card to open the URL related with a media.

Preview ()

Use this option on a card to download the media file.

My Action Center

With My Action Center, you can view all the tasks related to a business policy and manage tasks created or assigned to you. For more information on using My Action Center, refer to the [Using My Action Center](#).



The screenshot displays the 'My Action Center' interface for 'GDPR Policies', specifically for the 'Customer Phone Policy'. The interface includes a top navigation bar with tabs: 'View Business Policy', 'Additional Information', 'Associations', 'Rich Media Library', and 'My Action Center'. A 'Filter by Option' sidebar on the left shows filters for 'Important' (3), 'Pending' (4), and 'Completed' (1). Below this, a 'Filter by Types' section lists 'To-do Task' (3), 'Request Access' (2), and 'Issue' (0). The main content area features a 'Search Task' bar and a 'DEFAULT SORT' dropdown. It displays a list of tasks with columns for 'ALL TASKS (5)', 'CREATED BY ME (3)', and 'ASSIGNED TO ME (2)'. The tasks listed are 'POLICY_Customer Phone Policy_', 'Access to Catalog', and 'Associate Technical Assets'. Each task card shows a status icon, a description, a 'Request Access' button, and counts for 'ASSETS', 'USERS', and 'DOCS'. The 'Created By' field for each task is also visible.

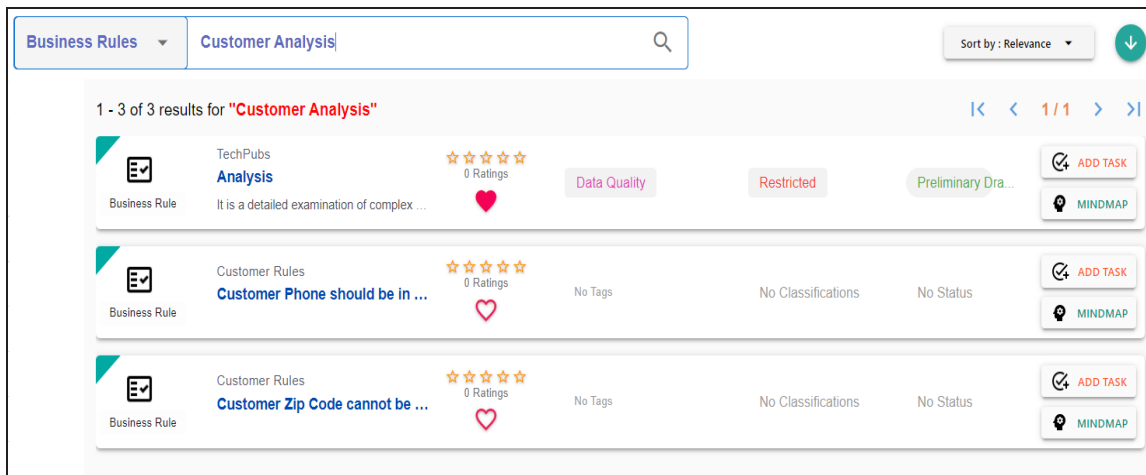
Business Rules

You can browse through the business rules in your ecosystem using the Discover Assets module. The list of business rules facilitates access to view system lineage, impact,

environments, mind map, and associations , all in one place.

To view the business rules list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Business Rules** card.


A list of business rules appears. Use the search box to find the required business rule from the list.



Alternately, on the search box, click **All**, and then click **Business Rules**.

On each business rule tile, you can perform the following tasks with respect to a business rule:

- [Add task](#)
- [View mind map](#)

In addition to the above tasks, on the business rule list, you can click  for a business rule to mark it as favorite.

View Business Rule

The View Business Rule tab includes rule details, governance responsibilities, audit history, and so on.

To access the View Business Rule tab, on the business policy list, click **<Business_Policy>**.

The **<Business_Policy>** page appears. By default, the View Business Policy tab opens.

For example, in the following image, details of the Analysis appears. This business rule's sensitive classification is Restricted, and it is tagged with Data Quality. The Rule Details section displays a business rule's name, definition, and description. The Governance Responsibilities section displays the data governance assignments.

The screenshot shows a web interface for a business rule named "Analysis". At the top, there's a header with "TechPubs" and "Analysis" in red. A navigation bar includes "View Business Rule" (active), "Associations", and "Rich Media Library". A red "Update" button with a close icon is in the top right. The main content is split into two columns. The left column, titled "Rule Details", contains three sections: "Business Rule" with the name "Analysis", "Definition" with the text "It is a detailed examination of complex churn rate in order to understand churn nature or to determine churn's essential features.", and "Description" with the text "The churn rate, also known as the rate of attrition or customer churn, is the rate at which customers stop doing business with an entity. It is most commonly expressed as the percentage of service subscribers who discontinue their subscriptions within a given time period." The right column, titled "Governance Responsibilities", contains two sections: "Data Stewards" with "Mike Mannigan" and "Technical Data Steward" with "Joey Adams", both in blue buttons with edit icons. Below these is a "Classification" section with an orange "Restricted" button. Share and help icons are in the top right of the main content area.

Associations

A business rule 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 business rules, on the **<Business_Rule>** page, click the **Associations** tab.

The list of associated assets appears. For example, in the following image the business rule, Analysis is associated with two business terms, Customer and Client - Customer, and two business policies.

TechPubs					
Analysis Update ×					
View Business Rule <u>Associations</u> Rich Media Library					
<u>Business Term(2)</u> Business Policy(2)					
#	Asset Name	Definition	Description	Catalogname	Catalog Hierarchy
1	CUSTOMER	a person who buys your product	a person who buys your product	Customer Master Catalog	Customer Master Catalog
2	Client - Customer		LEN(D1598)	International Society for Pharmaceutical Engineering - ISPE	Pharmaceuticals/International Society for Pharmaceutica

Rich Media Library

A business rule can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view or download these artifacts using the Rich Media Library tab.

To view or download supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.

TechPubs

Analysis Update ×

View Business Rule Associations Rich Media Library

Search

Search Criteria

Name

Christopher

erwin Doc

Documents related to Analysis.

🔗
⬇️

Christopher

SQL Query

SQL query related to Analysis.

🔗
⬇️

Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link ()

Use this option on a card to open the URL related with a media.

Preview ()

Use this option on a card to download the media file.

Viewing Compliance Reports

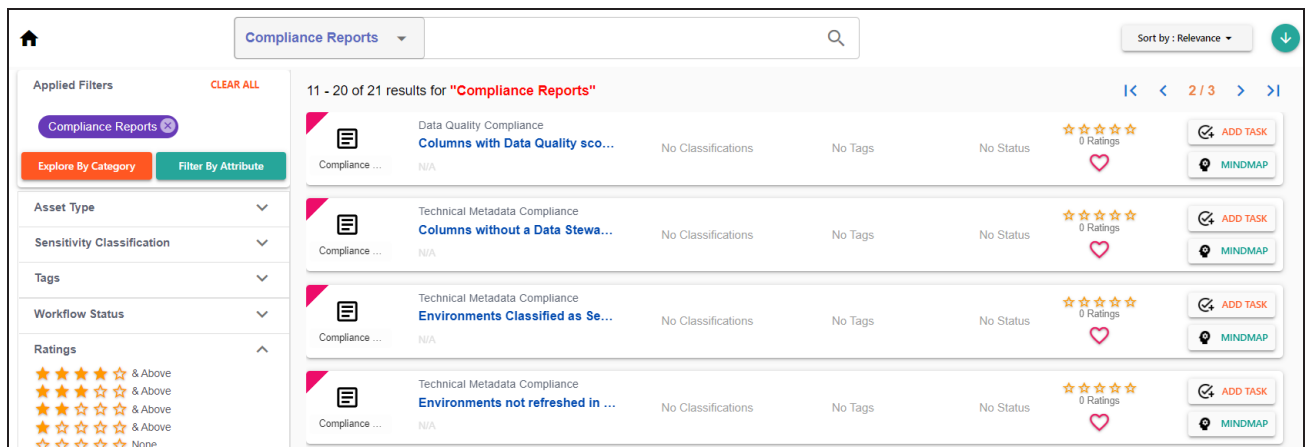
You can view and browse through the compliance reports available in your ecosystem using the Discover Assets module. Once the reports are generated, you can also download the compliance reports in .XLSX format.



To view compliance reports in this module, you must import the Compliance Reports Starter Kit into Business Glossary Manager. For more information on importing the Compliance Reports Starter Kit, refer to the [Importing Compliance Reports](#) topic.

To view the compliance reports list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Compliance Reports** card.

A list of compliance reports appears. Use the search box to find the required report from the list.




The screenshot displays the 'Compliance Reports' section of a software interface. At the top, there is a search bar and a 'Sort by: Relevance' dropdown. Below the search bar, a filter sidebar on the left lists 'Applied Filters' (CLEAR ALL), 'Compliance Reports' (selected), 'Explore By Category', and 'Filter By Attribute'. The main area shows '11 - 20 of 21 results for "Compliance Reports"'. It contains a list of four reports, each with a document icon, a title, a description, and a status. The reports are: 'Data Quality Compliance Columns with Data Quality sco...', 'Technical Metadata Compliance Columns without a Data Stewa...', 'Technical Metadata Compliance Environments Classified as Se...', and 'Technical Metadata Compliance Environments not refreshed in ...'. Each report has a 'No Classifications' and 'No Tags' status, a 'No Status' label, a star rating (0 Ratings), a heart icon, and 'ADD TASK' and 'MINDMAP' buttons.

Report Title	Classifications	Tags	Status	Ratings	Actions
Data Quality Compliance Columns with Data Quality sco...	No Classifications	No Tags	No Status	0 Ratings	ADD TASK, MINDMAP
Technical Metadata Compliance Columns without a Data Stewa...	No Classifications	No Tags	No Status	0 Ratings	ADD TASK, MINDMAP
Technical Metadata Compliance Environments Classified as Se...	No Classifications	No Tags	No Status	0 Ratings	ADD TASK, MINDMAP
Technical Metadata Compliance Environments not refreshed in ...	No Classifications	No Tags	No Status	0 Ratings	ADD TASK, MINDMAP

Alternatively, on the search box, click **All**, and then click **Compliance Reports**.

On each tile, you can perform the following tasks for a compliance report:

- [View report details](#)
- [Download report](#)
- [Add task](#)

In addition to the above tasks, on the compliance reports list, you can click  to mark a report favorite.

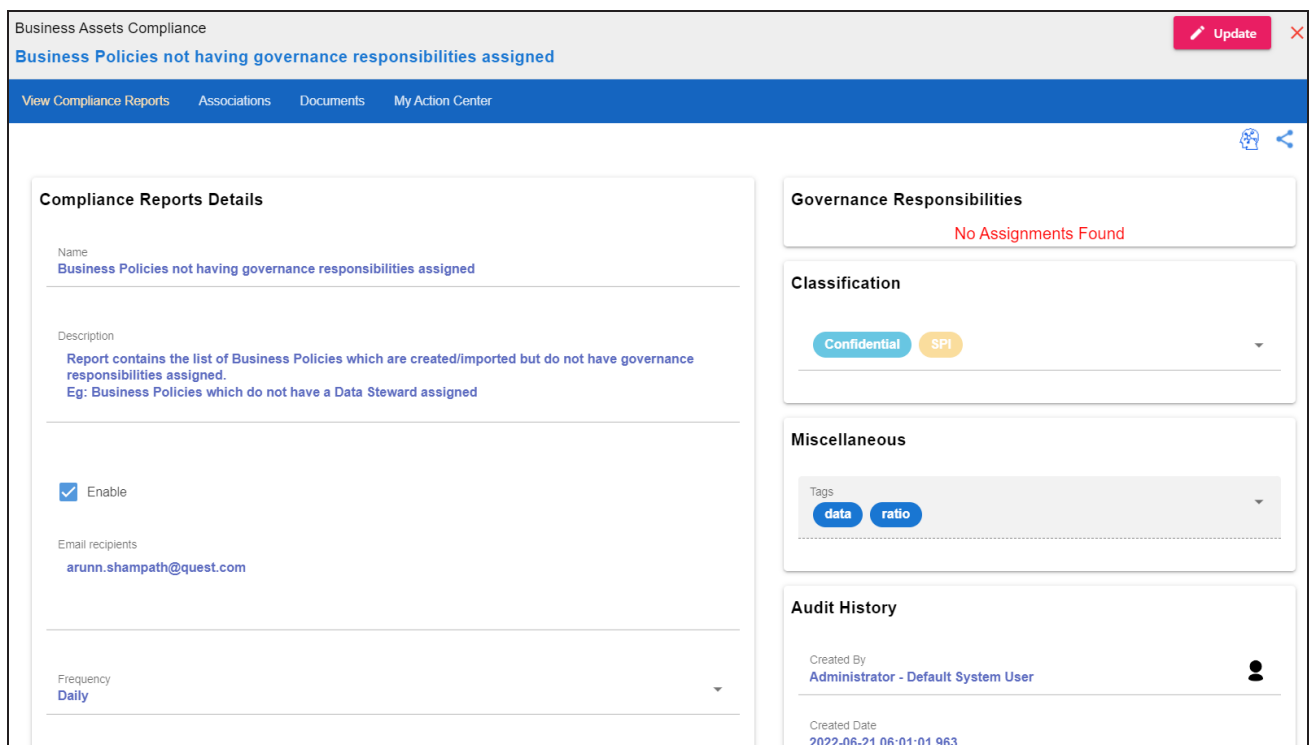
Viewing Report Details

The report details include report name, description, email recipients, report generation frequency, threshold, SDI classification, audit history, and so on.

To view report details, in the list, click a <Compliance_Report_Name>.

The <Compliance_Report> page appears. By default, the View Reports Details tab opens.

For example, the following image shows details of the Business Asset Compliance report.




The screenshot displays the 'Business Assets Compliance' report details page. The page has a header with the title 'Business Assets Compliance' and a subtitle 'Business Policies not having governance responsibilities assigned'. There is an 'Update' button in the top right corner. Below the header is a navigation bar with links: 'View Compliance Reports', 'Associations', 'Documents', and 'My Action Center'. The main content area is divided into two columns. The left column, titled 'Compliance Reports Details', contains fields for 'Name' (Business Policies not having governance responsibilities assigned), 'Description' (Report contains the list of Business Policies which are created/imported but do not have governance responsibilities assigned. Eg: Business Policies which do not have a Data Steward assigned), 'Enable' (checked), 'Email recipients' (arunn.shamopath@quest.com), and 'Frequency' (Daily). The right column contains four sections: 'Governance Responsibilities' (No Assignments Found), 'Classification' (Confidential, SPI), 'Miscellaneous' (Tags: data, ratio), and 'Audit History' (Created By: Administrator - Default System User, Created Date: 2022-06-21 06:01:01.963).

Business Assets Compliance	
Business Policies not having governance responsibilities assigned	
Update	
View Compliance Reports Associations Documents My Action Center	
<h3>Compliance Reports Details</h3> <p>Name Business Policies not having governance responsibilities assigned</p> <p>Description Report contains the list of Business Policies which are created/imported but do not have governance responsibilities assigned. Eg: Business Policies which do not have a Data Steward assigned</p> <p><input checked="" type="checkbox"/> Enable</p> <p>Email recipients arunn.shamopath@quest.com</p> <p>Frequency Daily</p>	<h3>Governance Responsibilities</h3> <p>No Assignments Found</p> <h3>Classification</h3> <p>Confidential SPI</p> <h3>Miscellaneous</h3> <p>Tags data ratio</p> <h3>Audit History</h3> <p>Created By Administrator - Default System User</p> <p>Created Date 2022-06-21 06:01:01.963</p>

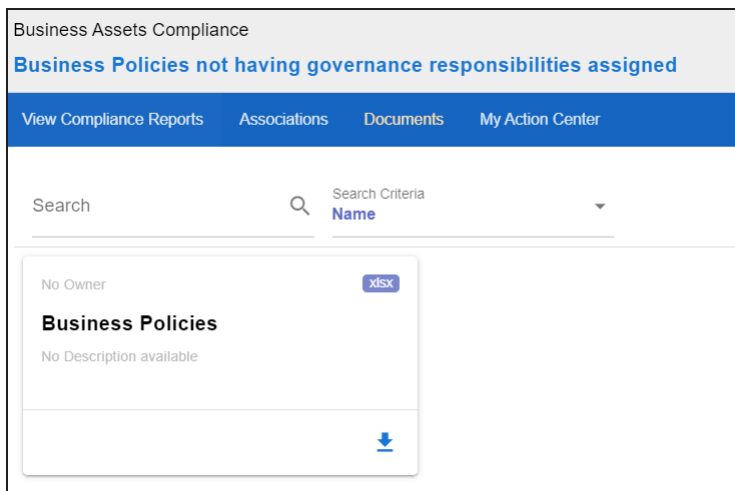
Downloading Reports

Once the report is generated, you can download the report in the .XLSX format.

To download the report, on the <Compliance_Report> page, go to the **Documents** tab.

Then, click .

For example, the following image shows downloadable report in the Documents tab of the Business Asset Compliance report.



Reviewing and Rating Assets

Using the Discover Assets module, you can rate and review data assets. Ratings enable you to maintain data asset quality of an asset and you can support ratings with descriptive reviews.

To review and rate assets, follow these steps:

1. On the **Discover Assets** dashboard, click the required <Asset_Type> card.

A list of assets appears. Use the search box to find the required asset from the list.

For example, in the following image, a columns list appears after entering Claim Count as the search string and selecting Columns as the asset type.

Columns Claim Count

Sort by : Relevance

1 - 10 of 503 results for "Claim Count"

erwin DM → DM Staging → Claims Anal...
Claim Count
 Claim Count
 Count of claims.

0 Ratings

No Tags

PII

Preliminary Dra...

ADD TASK

MINDMAP

LINEAGE

IMPACT

erwin DM → DM Staging → Claim
Claim Surrogate Key
 Claim Surrogate Key
 Claim Surrogate Key

0 Ratings

No Tags

No Classifications

Preliminary Dra...

ADD TASK

MINDMAP

LINEAGE

IMPACT

2. Click ratings for the required asset.

The Ratings and Reviews page appears.

Ratings and Reviews

Write a Review

erwin DM → DM Staging → Claims Analysis
Claim Count

0.0

based on 0 reviews

5 (0)

4 (0)

3 (0)

2 (0)

1 (0)

3. Click **Write a Review**.

The My Review page appears.

My Review

Rating

☆

☆

☆

☆

☆

Title

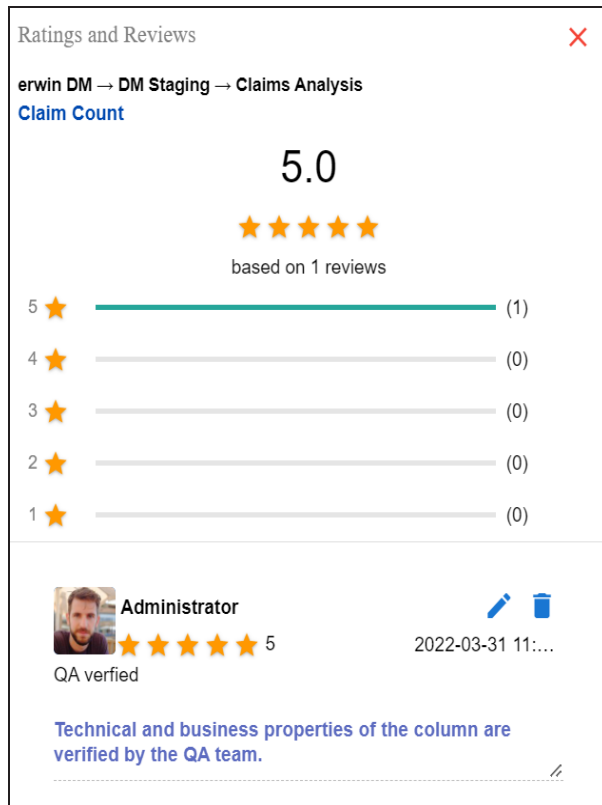
Review

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

Field Name	Description
Rating	Specifies the rating of the asset on a scale of one to five stars
Title	Specifies the title of the review
Review	Specifies the review content

5. Click .

The asset is rated and reviewed. The rating and review appear on the Ratings and Reviews page.



Use the following options to manage ratings and reviews:

Edit ()

Use this option to update your rating and review.

Delete ()

Use this option to delete a rating and review.

Adding Tasks

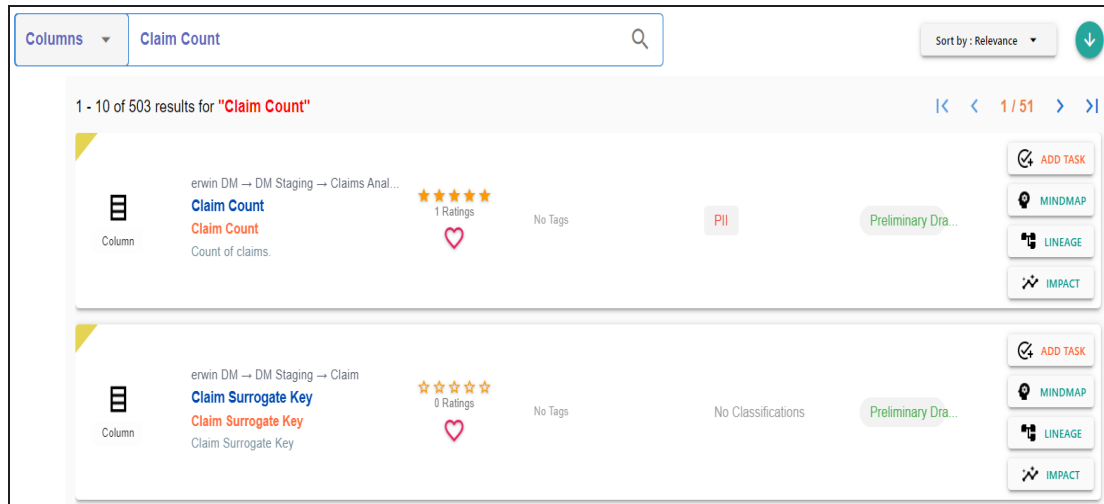
To improve productivity and collaboration, you can create tasks related to technical and business assets. These tasks may be to-do tasks, access requests, or issues. You can manage the task types via Action Center Settings.

To add tasks, follow these steps:

1. On the **Discover Assets** dashboard, click the required **<Asset_Type>** card.

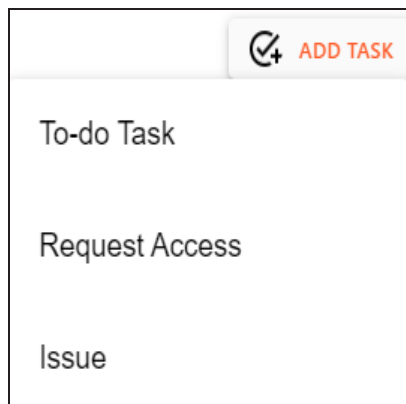
A list of assets appears. Use the search box to find the required asset.

For example, in the following image, a columns list appears after entering Claim Count as the search string and selecting Columns as the asset type.



2. Click **Add Task**.

A list of task types appears.



3. Click the required task type.

The Create New Task page appears.

Create New Task

TASK DETAILS

Task is being created on Asset

Claim Count

COLUMN

With Task Type as

To-do Task

Name


COLUMN_Claim Count_

19 / 200


Description

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

Field Name	Description
Task is being created on Asset	Specifies the asset for which the task is being created. For example, Column.
With Task Type as	Specifies the task type. For example, To-do Task.
Name	Specifies the name of the task. By default, it auto-populates with a name in the following format: <Asset_Type>_<Asset_Name>. You can edit it and rename the task. For example, Set Sensitive Classification.
Description	Specifies a description of a task. For example: Mark this asset as sensitive and clas-

Field Name	Description
	sify as PII.
Important	Specifies whether the task is important
Due	Specifies the due date of the task. To set the due date, click  .
Assign Users	Specifies the users assigned to the task. You can assign DI and BU users from the list. For a business asset, users with Data Governance (DG) assignment and the one who creates the task are assigned to the task by default.
External user emails	Specifies the email ID of external users. For example, chris.harris@quest.com

5. Click .

The task is created and saved. To edit the task details and attach relevant documents, click . You can manage tasks via My Action Center.

Set Sensitive Clas... Created by **Me**
To-do Task Apr-05-2022 06:11:58

TASK DETAILS CHAT

Name
Set Sensitive Classification
 28 / 200

Description
 Mark this asset as sensitive and classify as PII.
 49 / 500

Attachments & URLs
 DOCUMENTS 0

Assigned Assets
Claim Count
 COLUMN

Type
 To-do Task

Chat

Use the Chat tab to send messages to the assigned and external users of a task.

On the **Chat** tab, enter your message in the text box and use the following options:

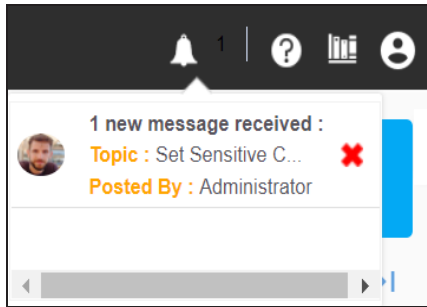
Assigned

Use this option to send messages to the assigned users.

External Users

Use this option to send messages to external users.

Users are notified via Messaging Center.



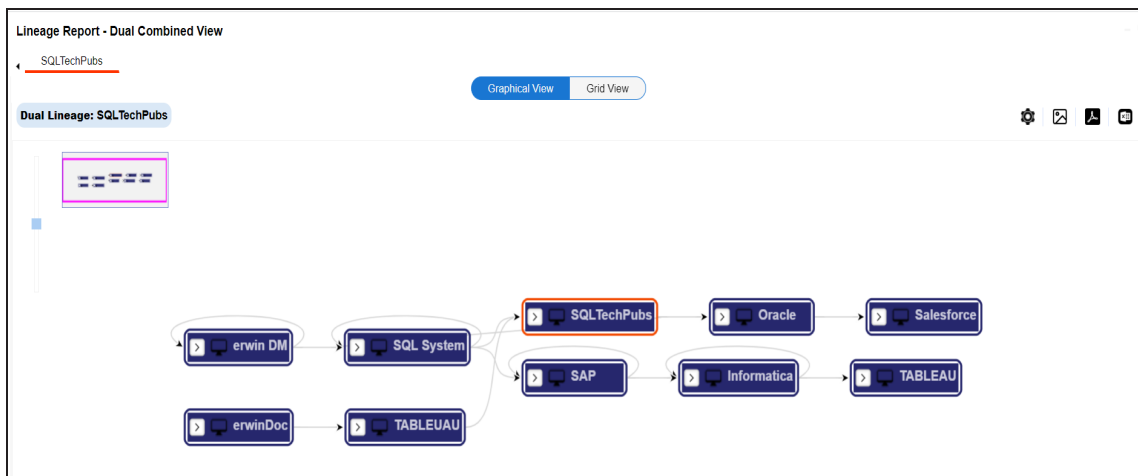
Viewing Lineage

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

To view lineage, on the <Technical_Asset> tile or page, click **Lineage**.

The Lineage Report - Dual Combined View page appears. By default, the lineage appears in graphical view.

For example, the following image displays dual lineage of a system, SQLTechPubs.



You can view lineage at system, environment, table, and column levels. For more information, on analyzing lineage at different levels, refer to the following:

- [System](#)
- [Environment](#)

- [Table](#)
- [Column](#)

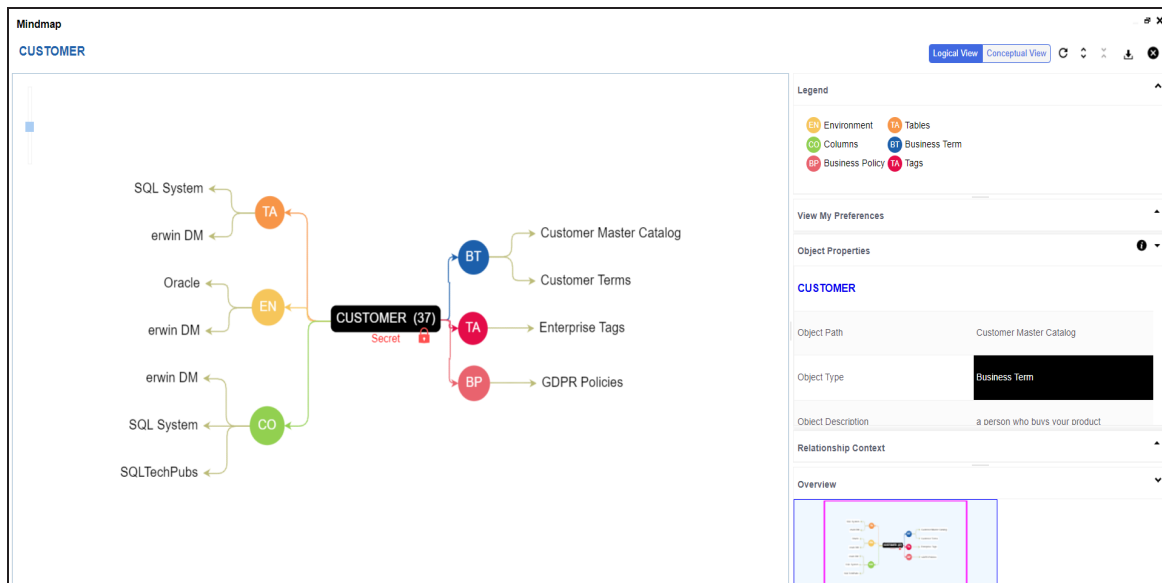
Viewing Mind Maps

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 assets. You can also filter the mind map contents based on asset types and relationships to view a focused mind map.

To view mind map, on the asset tile or page, click **Mind Map**.

The mind map of the asset appears.

For example, in the following image displays mind map of a business term, Customer.



With Discover Assets, you can view and analyze mind maps of both [technical](#) and [business](#) assets.

Viewing Impact

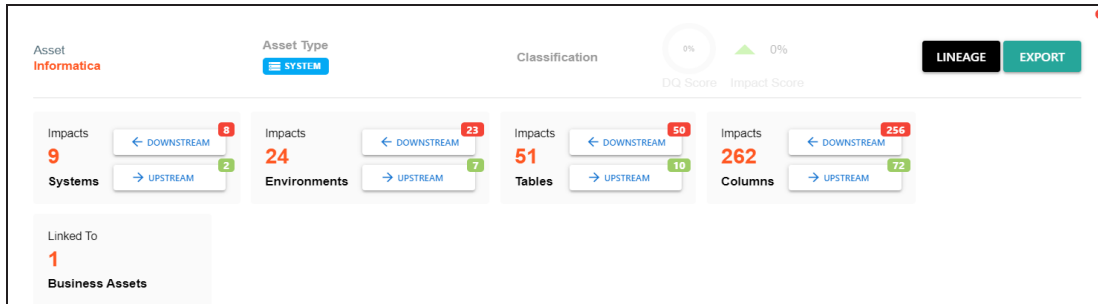
A technical asset may act as a source, target, or both in mapping projects. Impact analysis of a technical asset displays the impact of the technical asset as source and target.

Additionally, impact analysis of tables and columns display:

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

To view impact of an asset, on the <Technical_Asset> tile or page, click **Impact**.

The asset impact page appears. For example, the following image displays impact of an environment, Informatica.



For more information on working on impact of technical assets, refer to the [Running Impact Analysis](#) topic.