# erwin Data Intelligence

## Discover Assets Guide

### Release v12.1

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# Contents

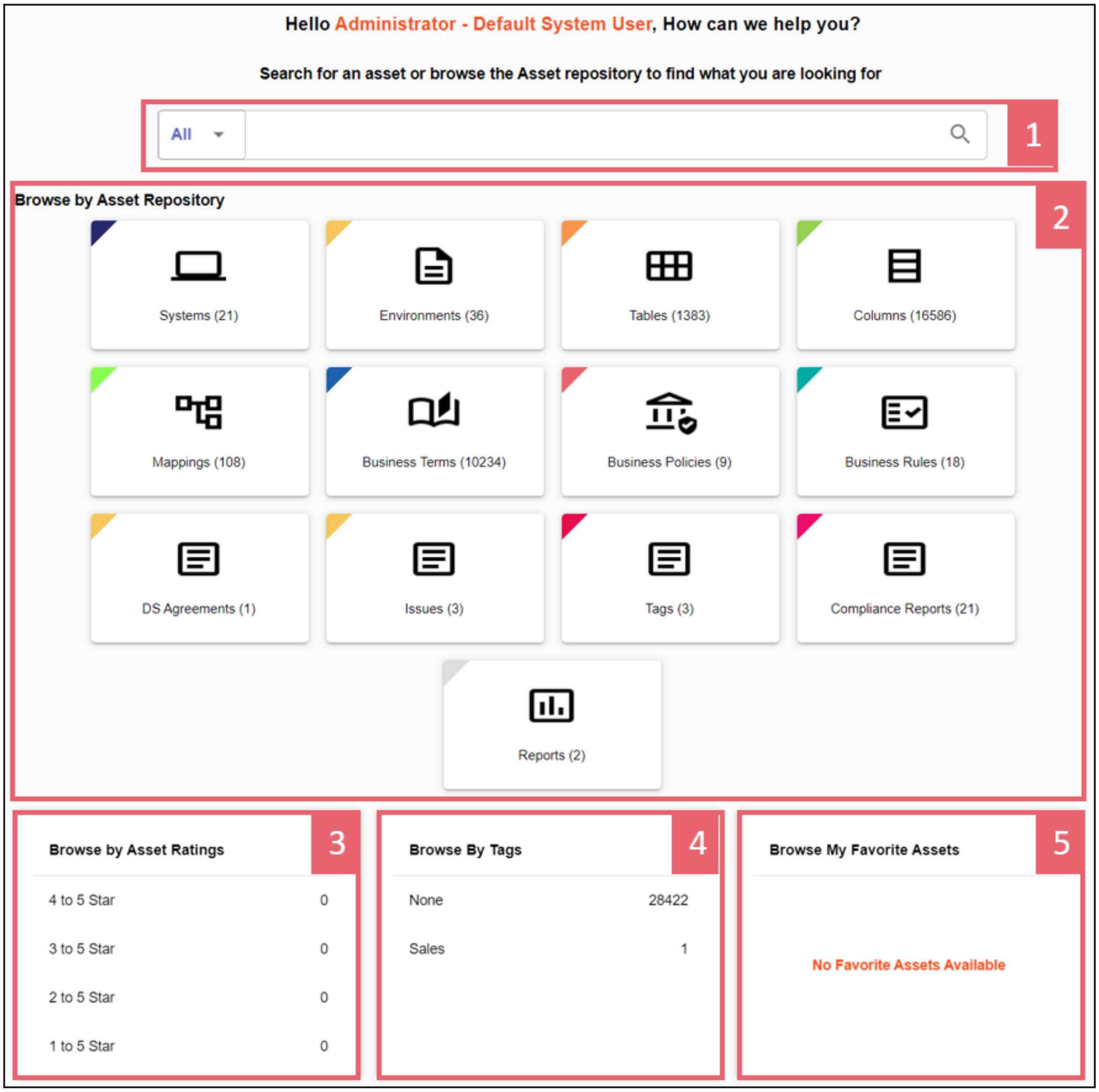
# Discovering Assets

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:




| UI Section | Function |
| --- | --- |

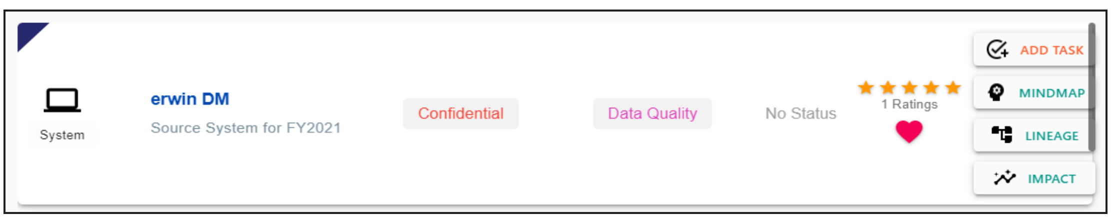
## Using Discover Assets

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

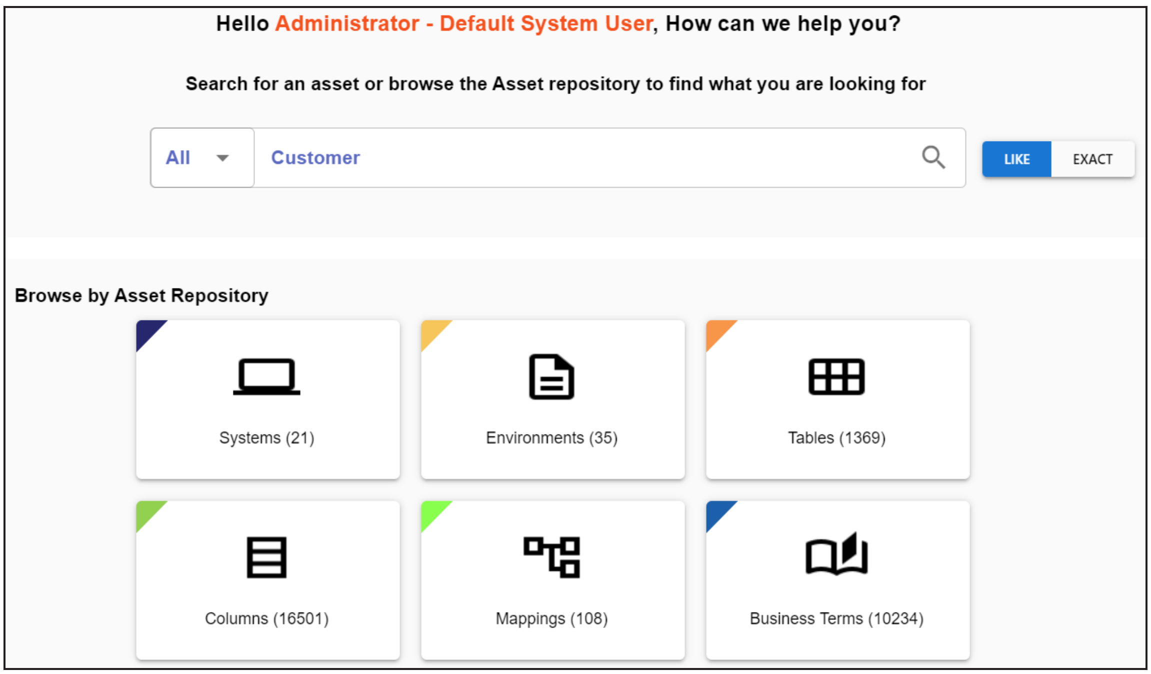
# Searching and Filtering

For efficient asset discovery, the Discover Assets module provides extensive search and filter options. Apart from the predefined filter set for asset discovery, you can also configure an extended properties of technical and business assets as a filter. The configured extended properties appear as a filter in the Discover Assets module and you can use them to search for assets based on custom fields.

To search and filter assets, follow these steps:

1. In the search box, type a keyword.

   Two options, Like and Exact, appear.




   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.

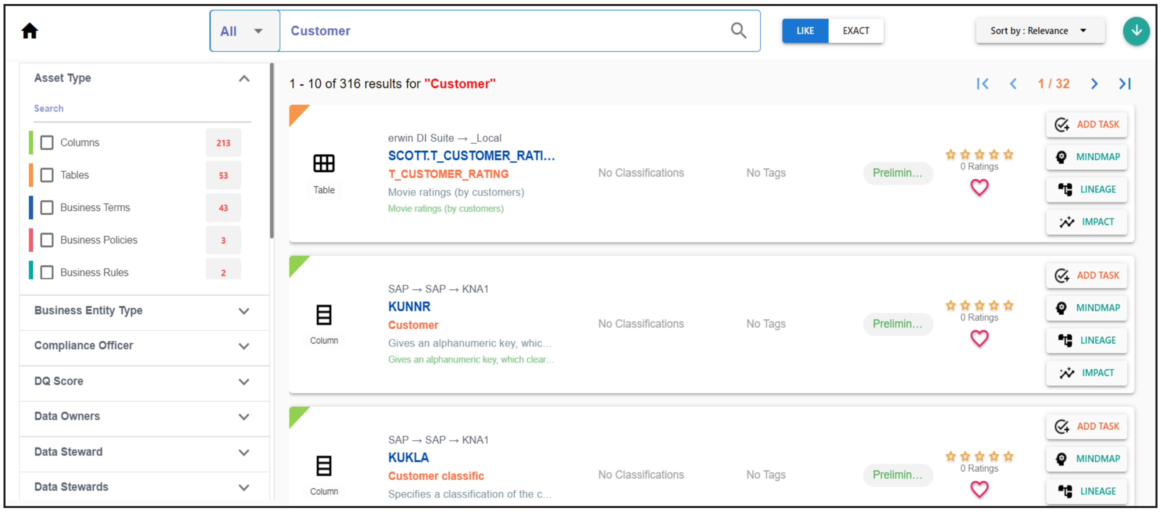
   **Exact**

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

2. 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.

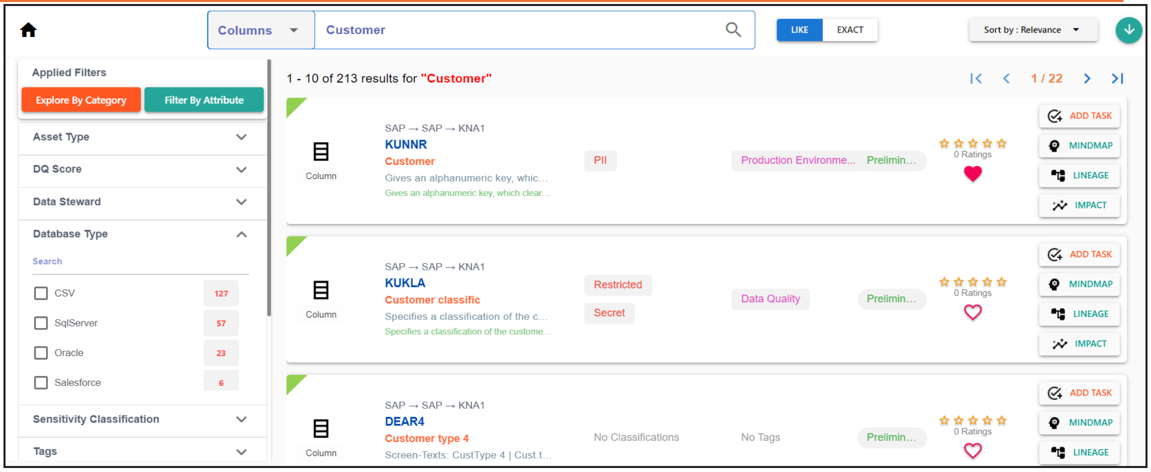



3. In the search box, click **All** to filter search results based on an asset types.

   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.

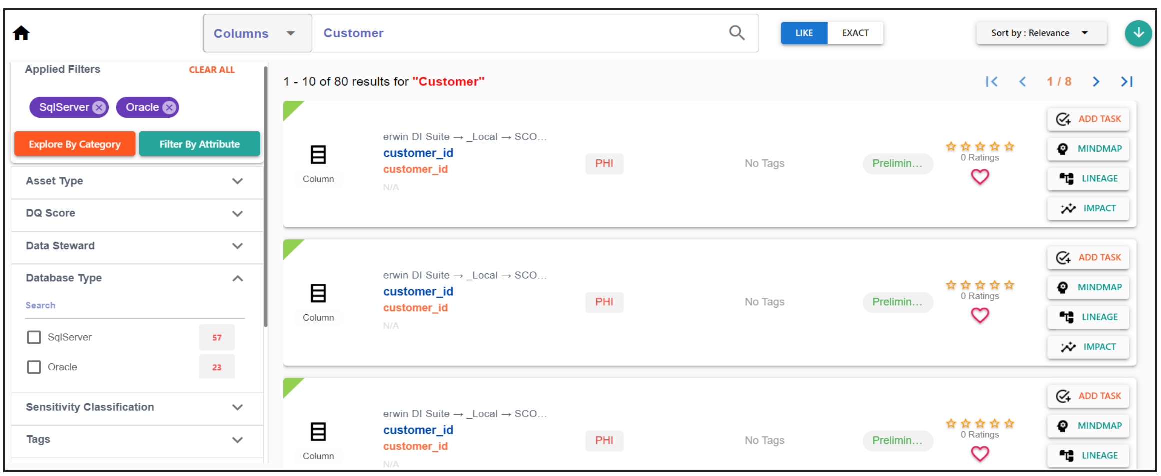
   Executing a Like search for a column, produces results based on partial matches found in column name, logical column name, column definition, column comments, expanded logical name, and user-defined fields.



4. 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.

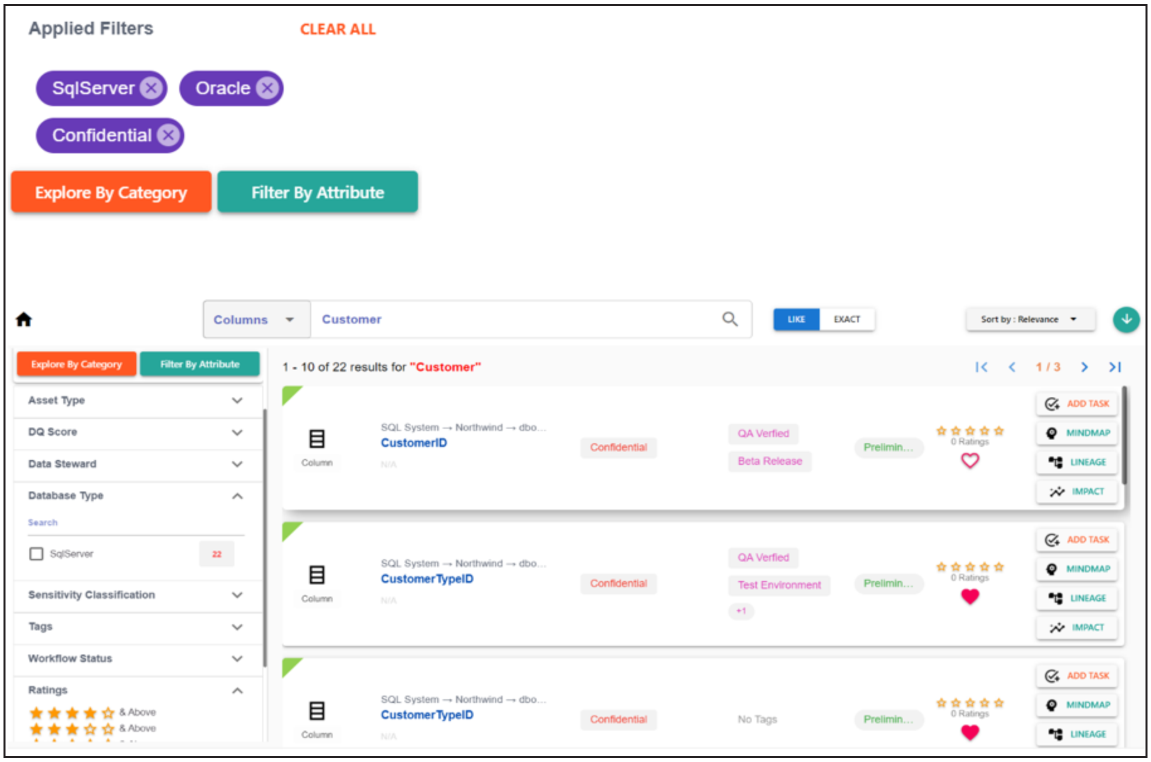
   For example, in the following image, SqlServer and Oracle are added to the Applied Filters list and the search result is narrowed down to 80 results.



5. 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.

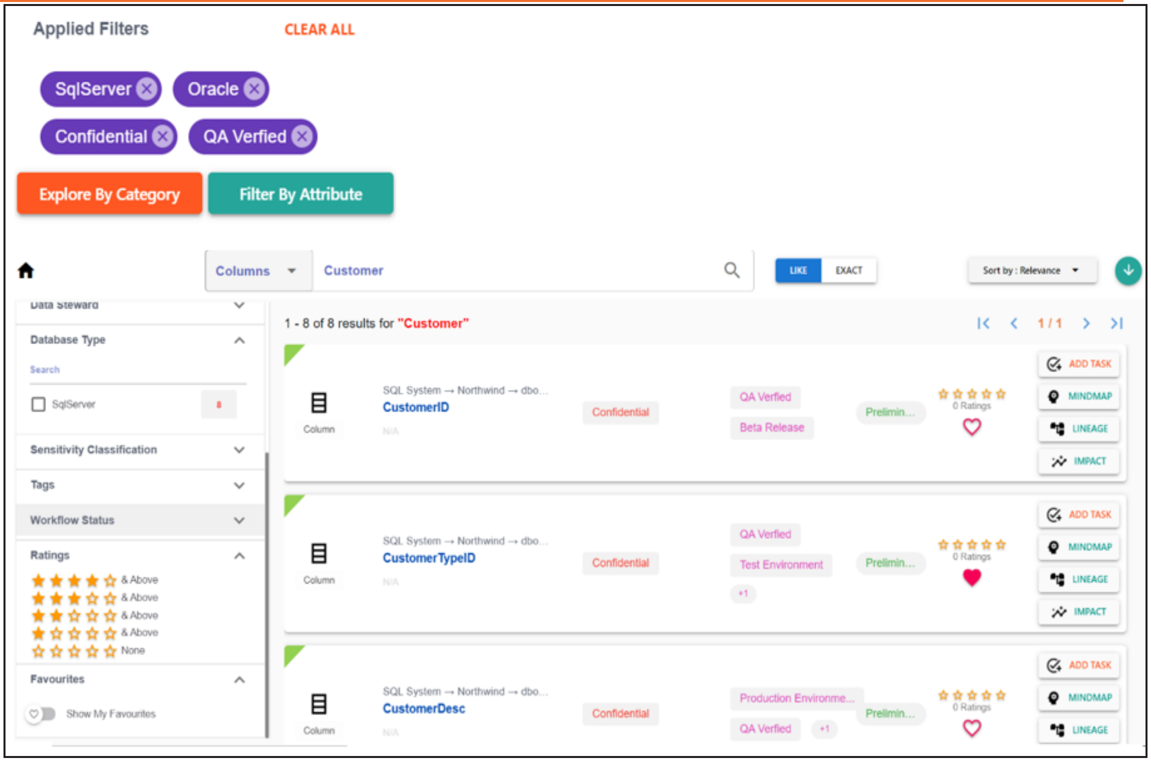
For example, in the following image, a sensitivity tag, Confidential, is added to the Applied Filters list and the search result is narrowed down to 22 records.




6. 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.

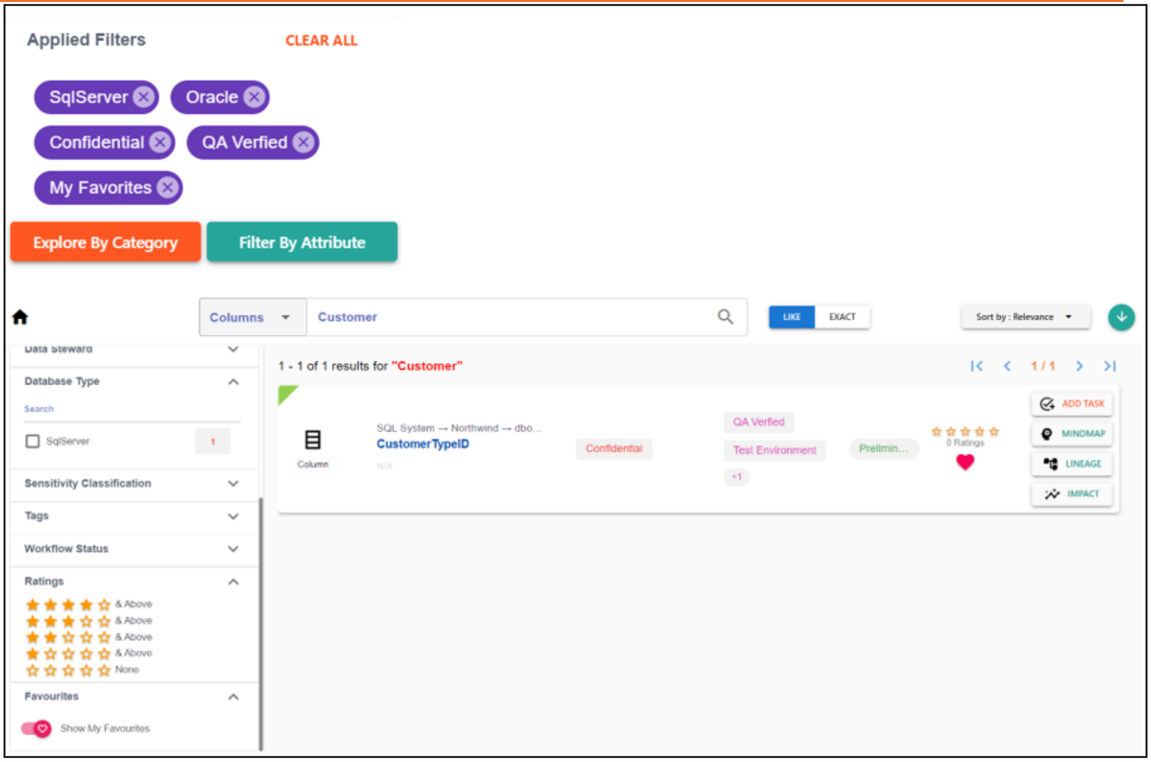



7. Switch **Show My Favorites** to on.

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

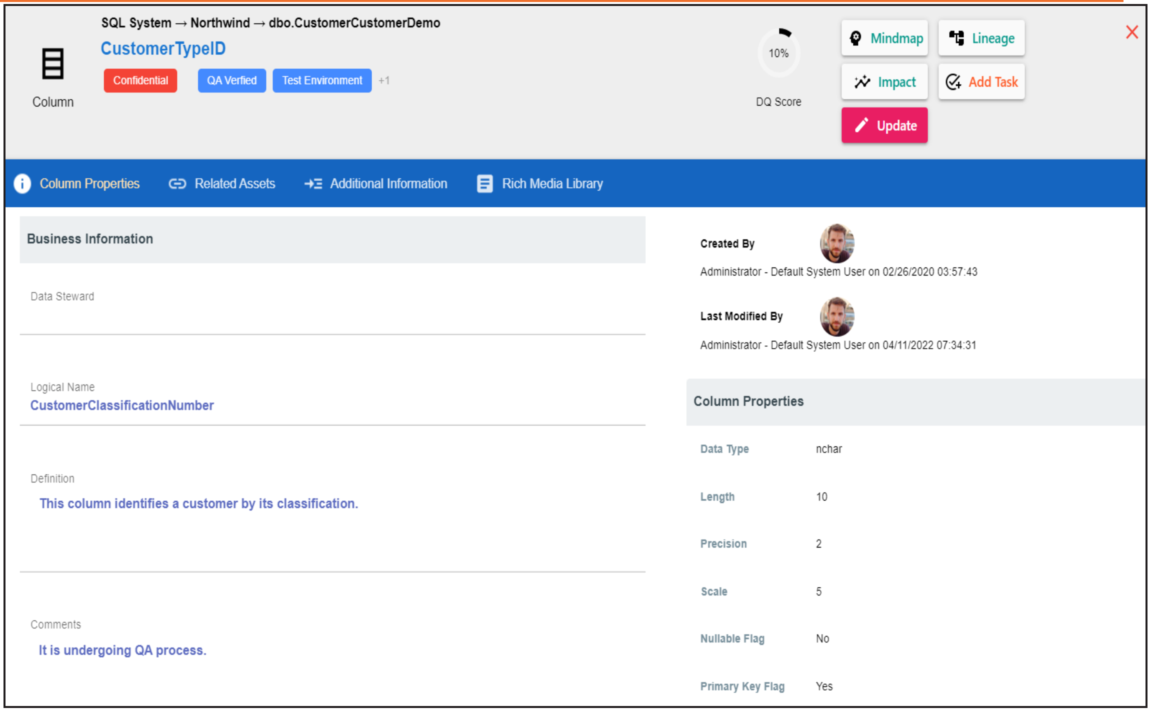
   For example, in the following image, My Favorites is added to the Applied Filters list and the search result is narrowed down to one record.

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




8. Click **<Asset_Name>** to view asset properties.

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




# Filter Assets using Extended Property

You can filter assets based on the configured extended property of technical and business assets. The configured extended properties appear as a filter in the Discover Assets module and you can use them to search for assets based on custom fields.

To configure an extended property as filter and use it the Discover Assets module, refer to the configuring extended properties for business and technical assets topics.

> To use an extended property as a filter, ensure the following:
>
> - Filter feature supports field types such drop-down, list, checkbox, radio, and boolean.
> - Switch the **Include Extended Properties** option **ON** in the discover asset settings page.
> - Schedule a sync job or manually sync the asset before you can filter assets on the Discover Assets module.

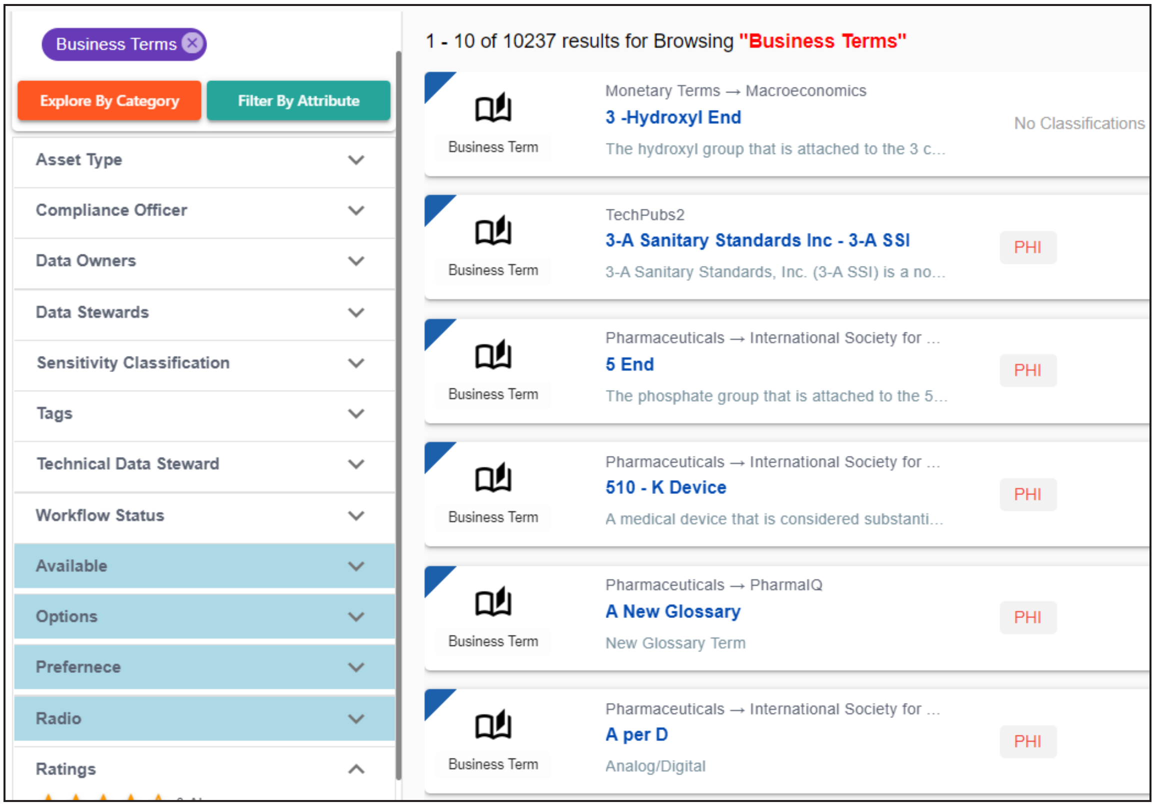
## Searching and Filtering

To filter assets based on the extended properties, follow these steps: The custom filters appear in the filter pane. follow these steps:

1. In the Discover Assets module, select an asset type.

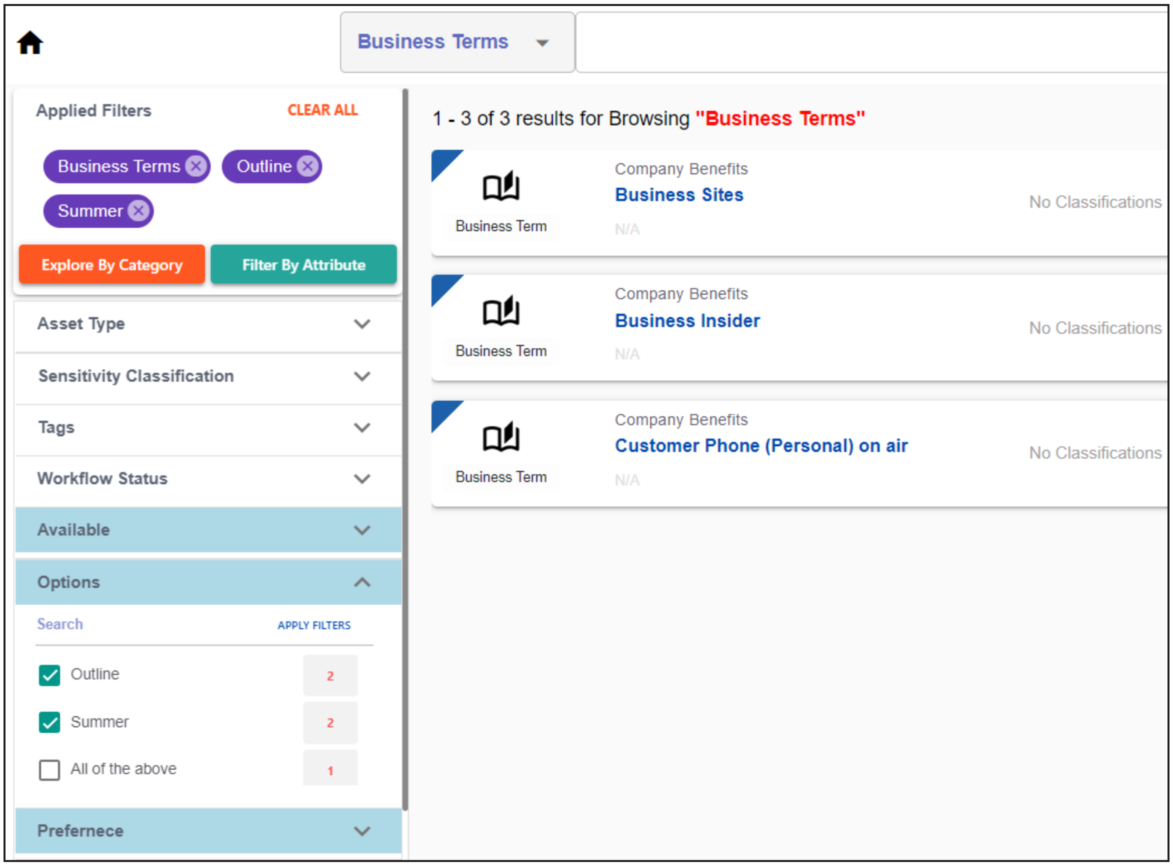
   Based on the selection, the results are displayed.

2. In the filter pane, the available custom filters appear below the default filter options. The custom filters are displayed in blue color.




3. In the filter pane, expand the custom filter, select an filter parameter, and then click **Apply Filters**.
   The selected parameters 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, Outline and Summer are added to the Applied Filters list and the search result is narrowed down to three results.

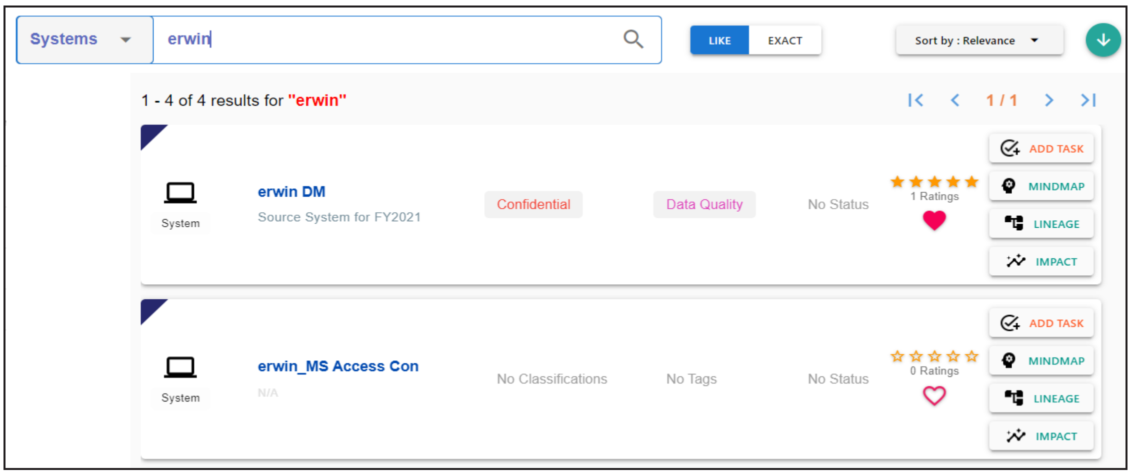


# Systems

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.

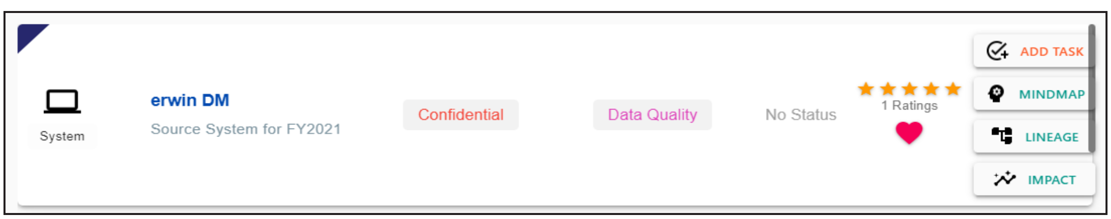
To view the systems list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Systems** card.

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.



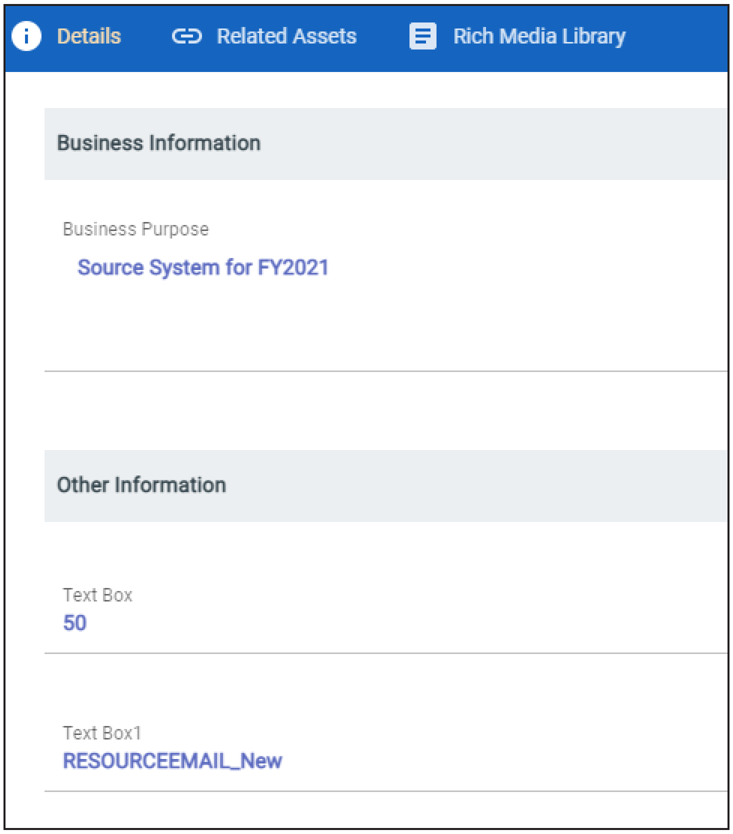

## System Details

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.



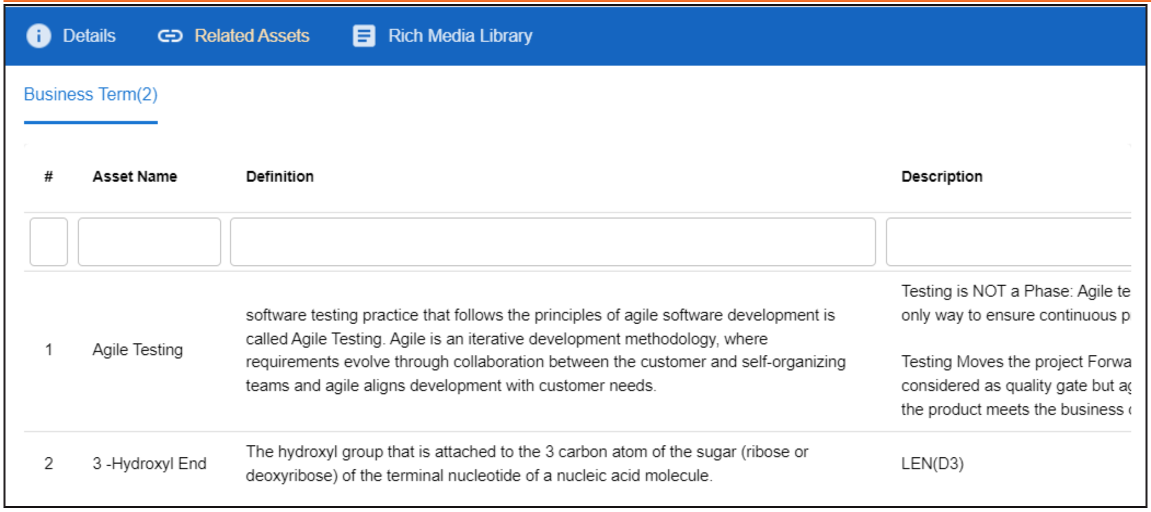

## Related Assets

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.

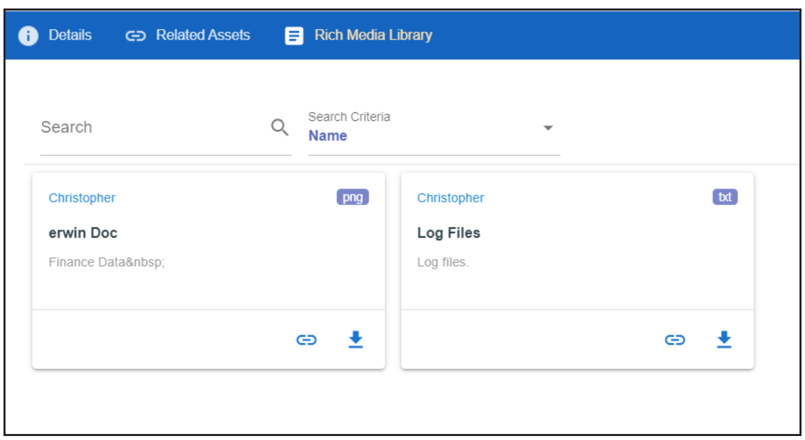



## Rich Media Library

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:

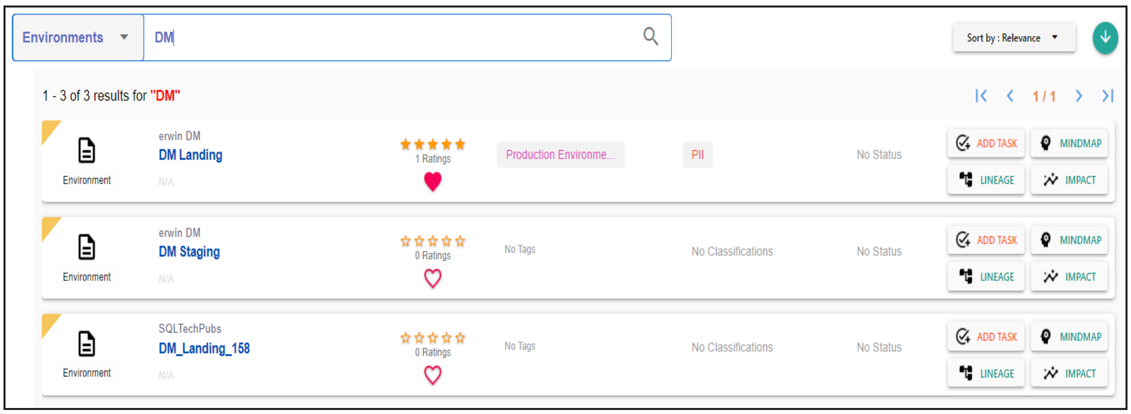
- **Mindmap**: Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the Viewing Mind Maps topic.
- **Lineage**: Use this option to trace system's origin and destination after source to target mappings. For more information on lineage,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

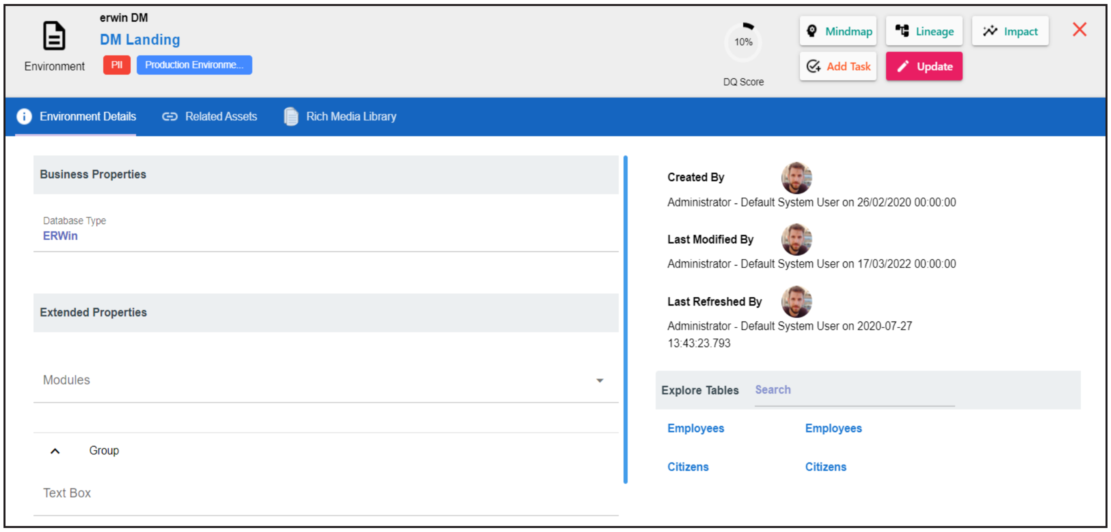
## Environment Details

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.



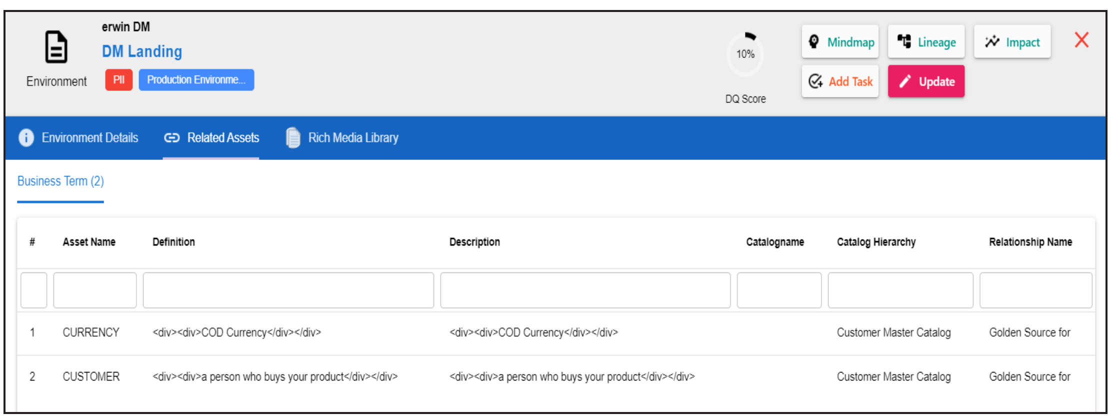

# Related Assets

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

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

The list of associated assets appears.

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

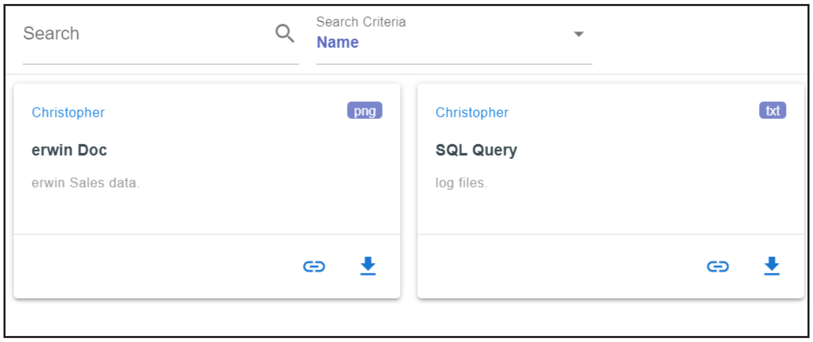


## Rich Media Library

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.

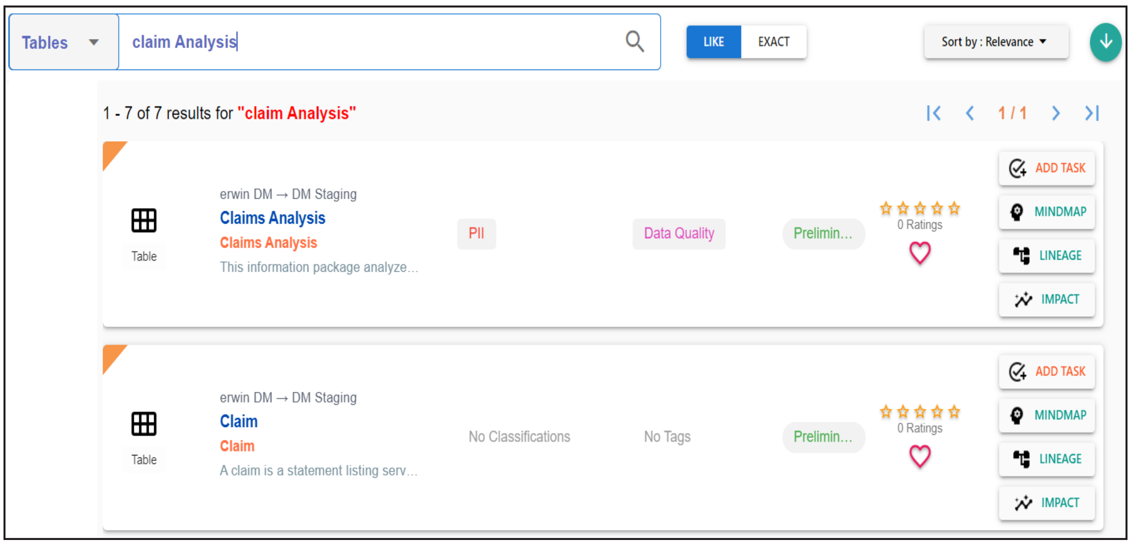
- **Lineage**: Use this option to trace environment's origin and destination after source to target mappings. For more information on lineage, refer to the Viewing Lineage topic.
- **Impact**: Use this option to analyze the impact of an environment as source and target. For more information on impact, 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.

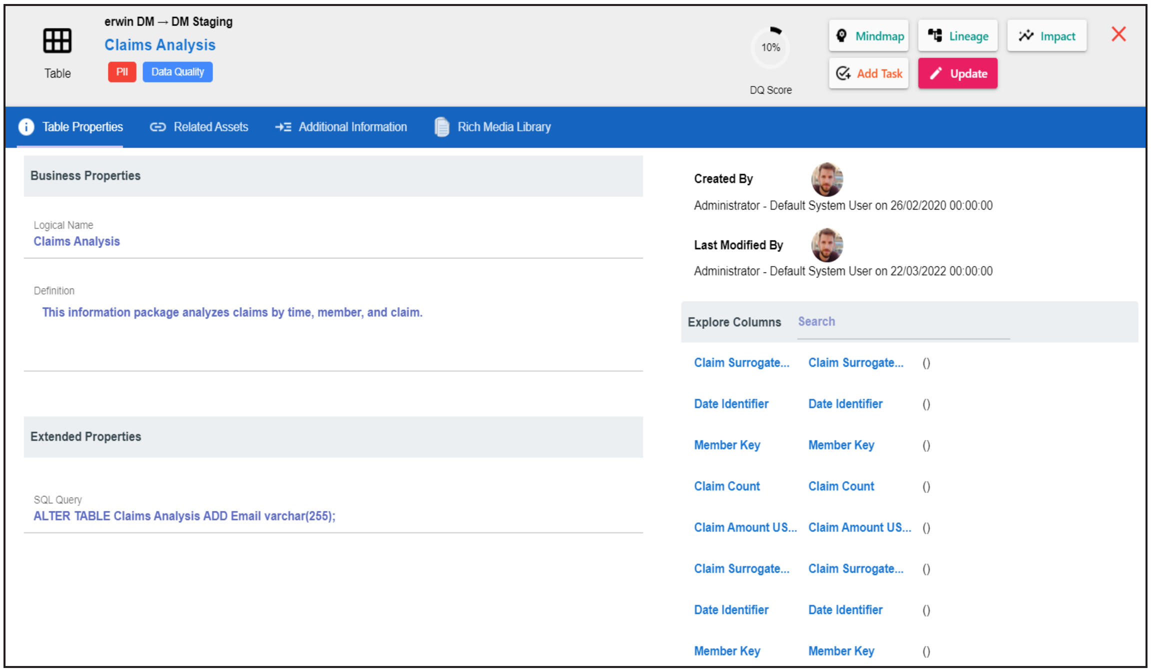
## Table Properties

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.



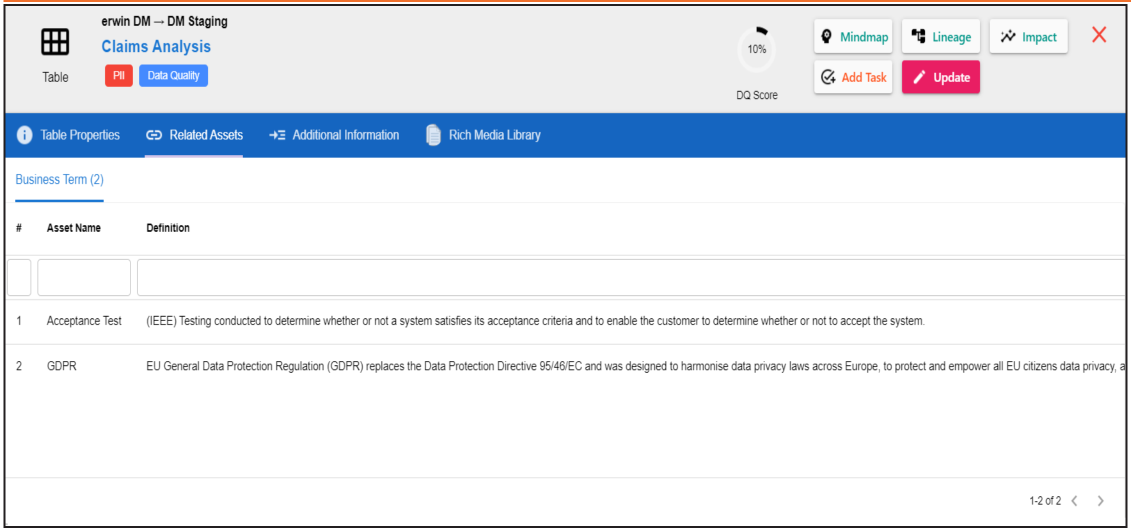

## Related Assets

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.

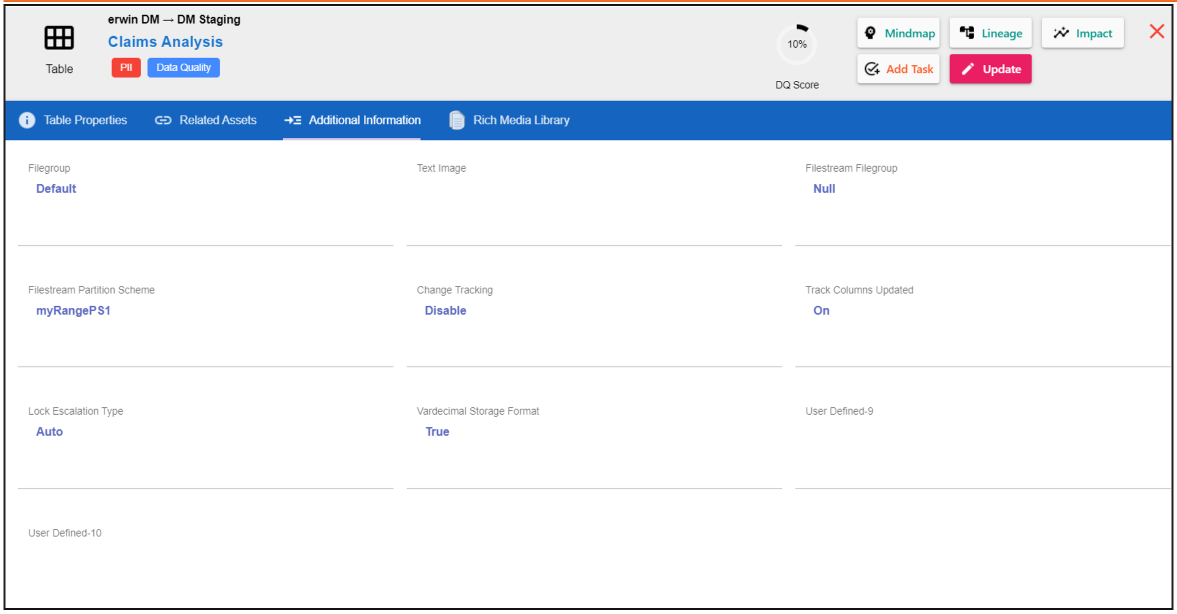



## Additional Information

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.

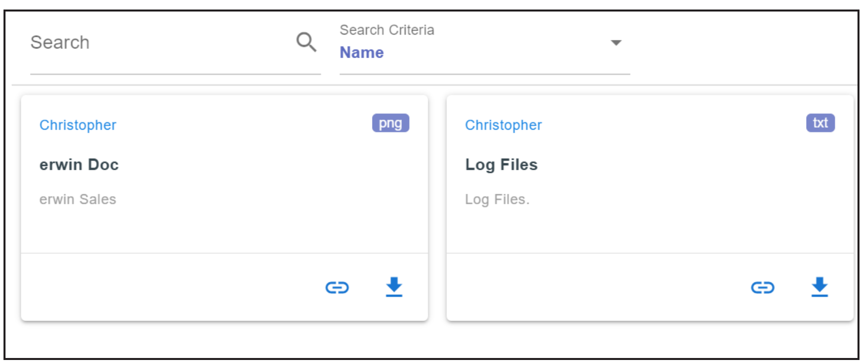



# Rich Media Library

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:

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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:

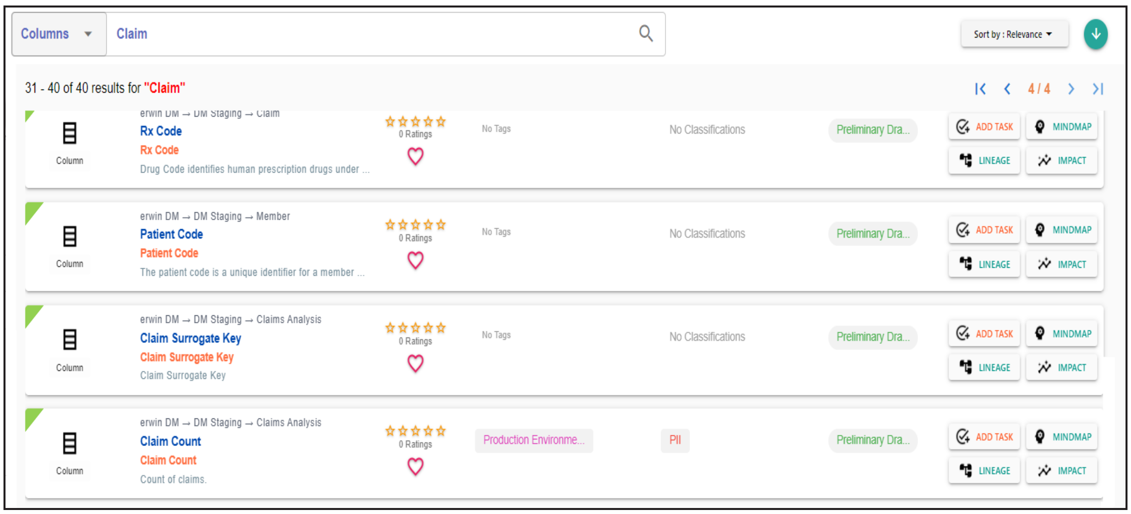
- **Mindmap**: Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the Viewing Mind Maps topic.
- **Lineage**: Use this option to trace table's origin and destination after source to target mappings. For more information on lineage,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

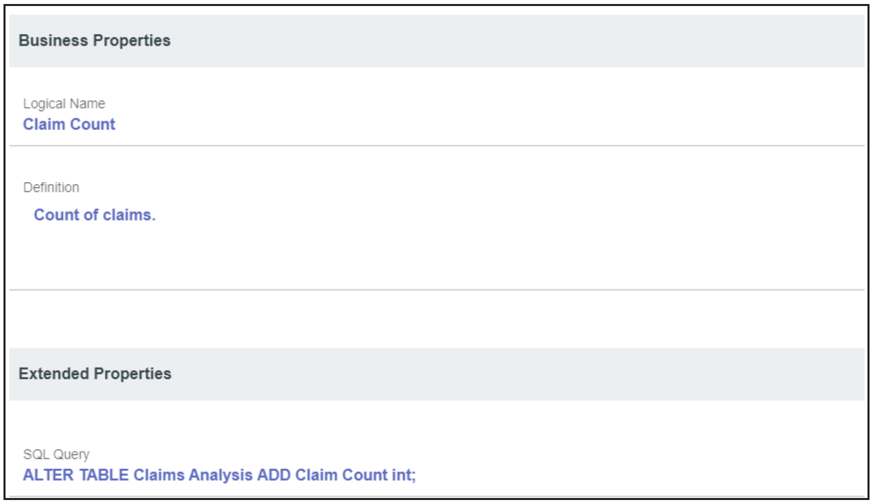
## Details

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.



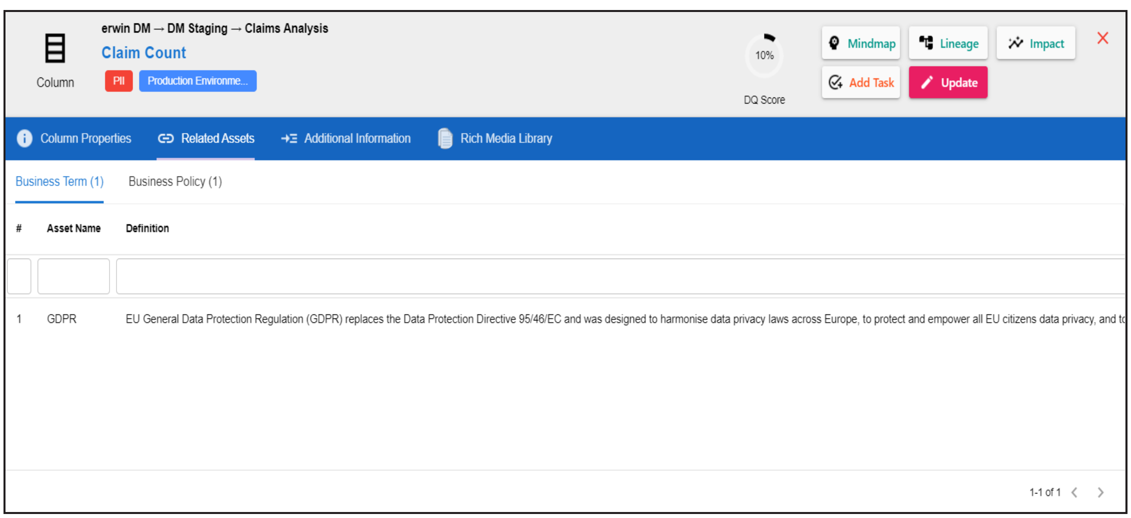

## Related Assets

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.



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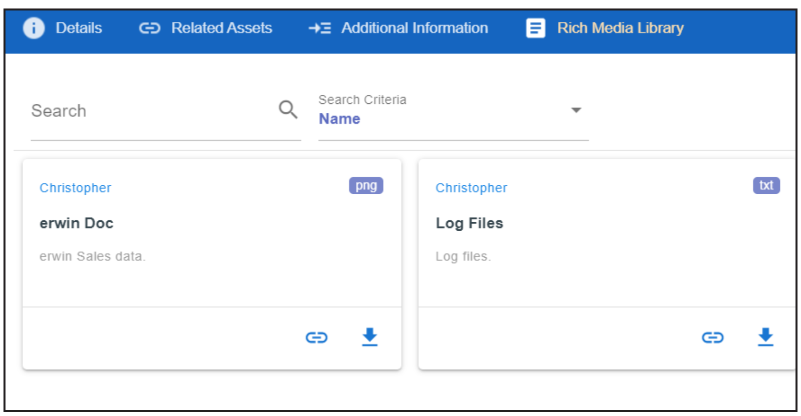


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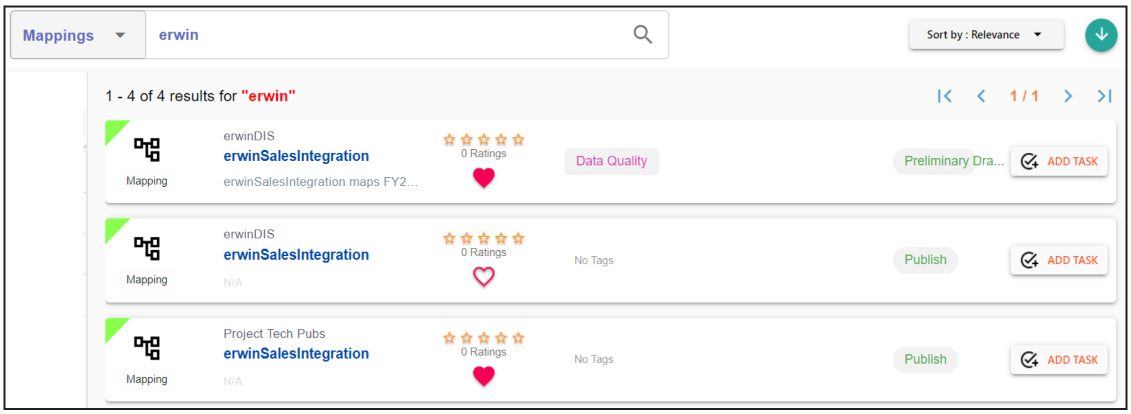
- **Add Task**: Use this option to add tasks related to a column. For more information on adding tasks, refer to the Adding Tasks topic.
- **Update**: Use this option to update column details. This opens the Metadata Manager.

# 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:<br>▪ SQL Query relevant to a mapping specification<br>▪ SQL Query Description |

**Mappings**

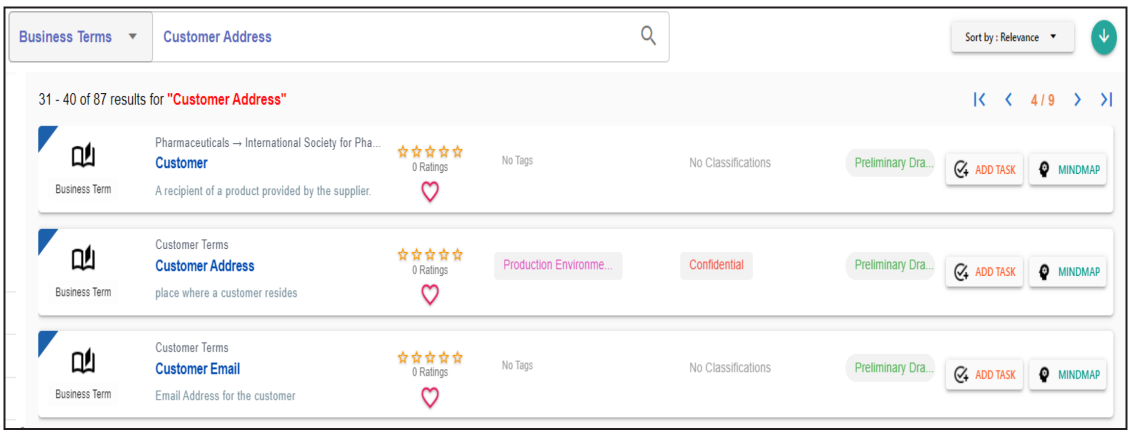
| Tab | Description |
|---|---|
| Target Update Strategy | Under this, you can view target update strategy of a map. |
| Testing Notes | Under this, you can view relevant testing notes with respect to a mapping specification. |
| Map Specs Docs | Under this, you can view the uploaded documents related 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. |
| 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.




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

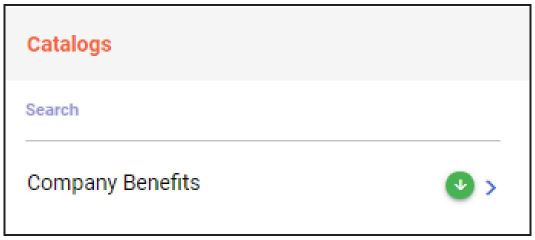
- Add task
- View mind map

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

You can also download business assets in the XLSX format. To download business assets, follow these steps:

1. In the filters pane, click **Explore By Category** and hover over a business asset.

   The download button appears.

2. Click .

   The selected business asset is downloaded in the XLSX format.

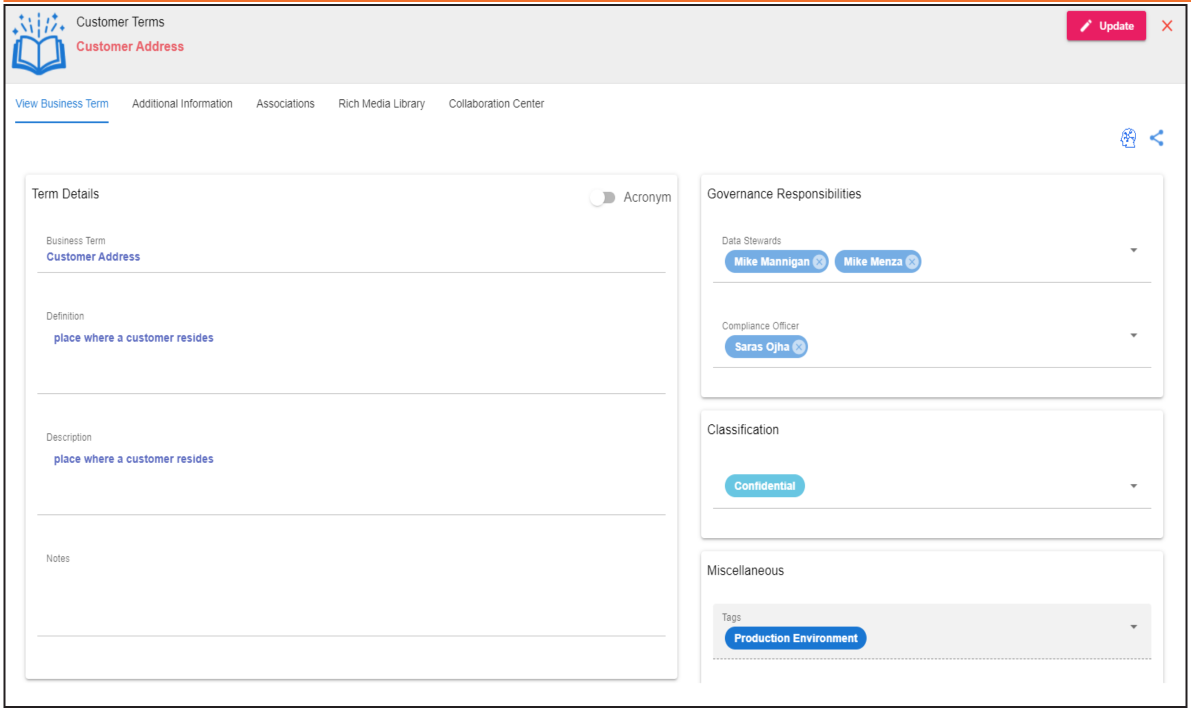
## Viewing Business Term

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.

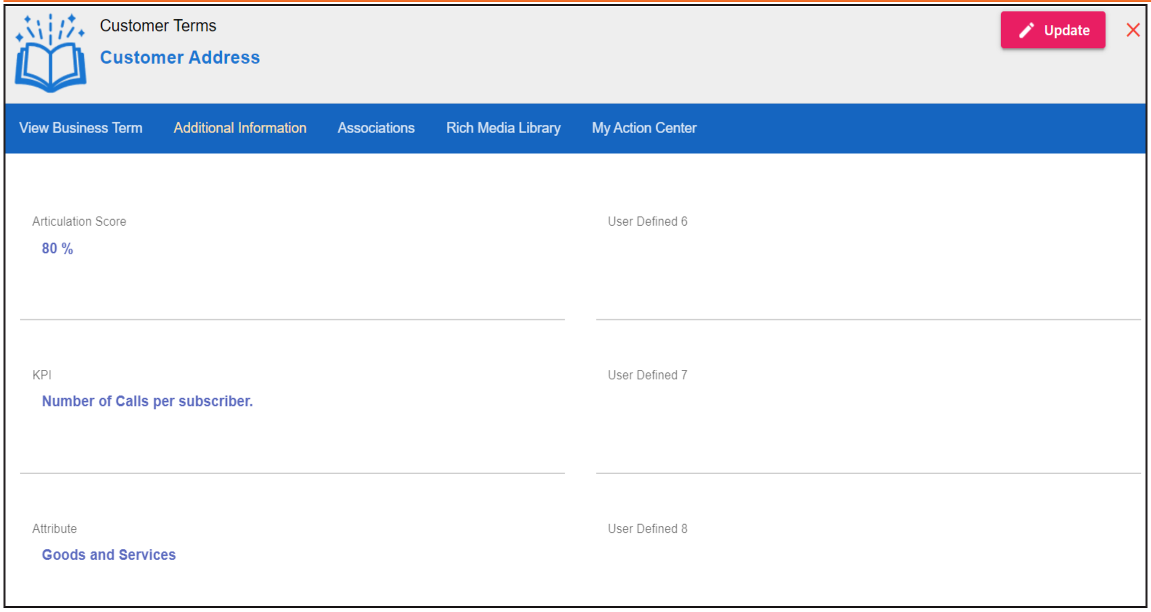



## Additional Information

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.

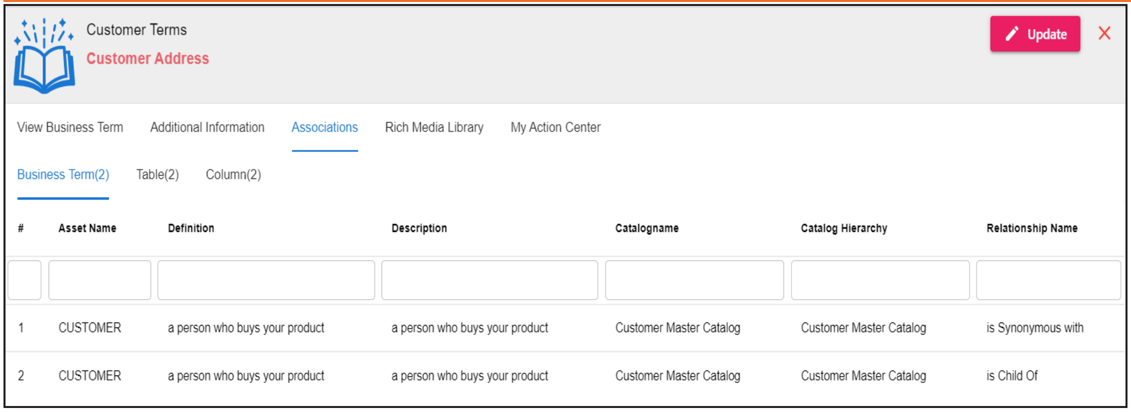



# Associations

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.

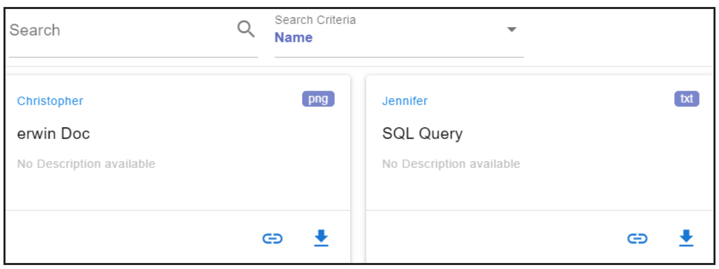



## Rich Media Library

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 ( )**

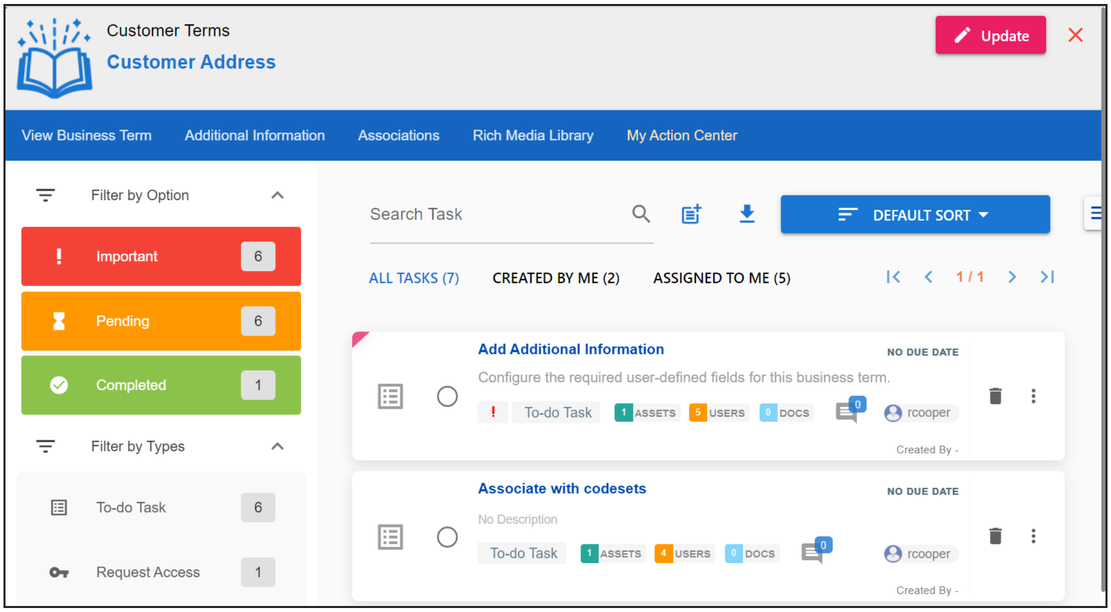
Use this option on a card to open the URL related with a media.

**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.

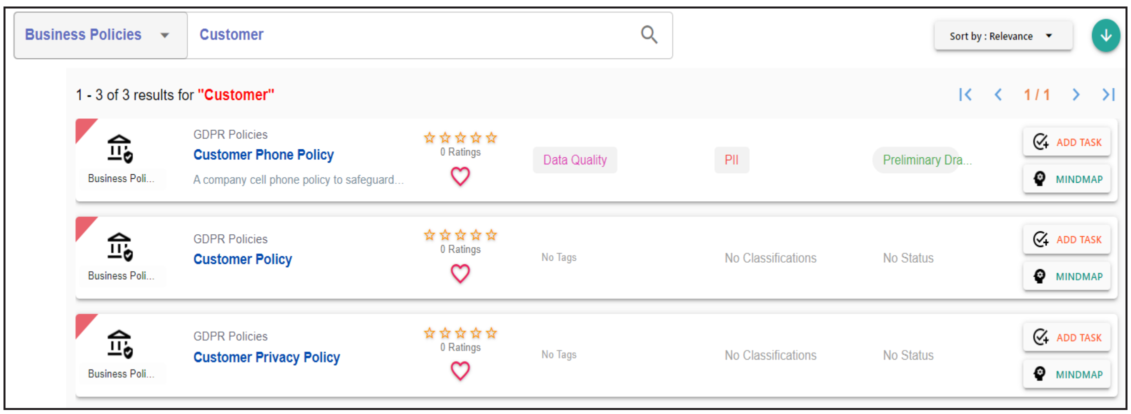


# Business Policies

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.




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

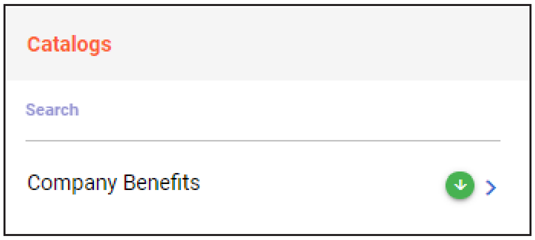
- Add task
- View mind map

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

You can also download business assets in the XLSX format. To download business assets, follow these steps:

1. In the filters pane, click **Explore By Category** and hover over a business asset.

   The download button appears.

2. Click .

   The selected business asset is downloaded in the XLSX format.

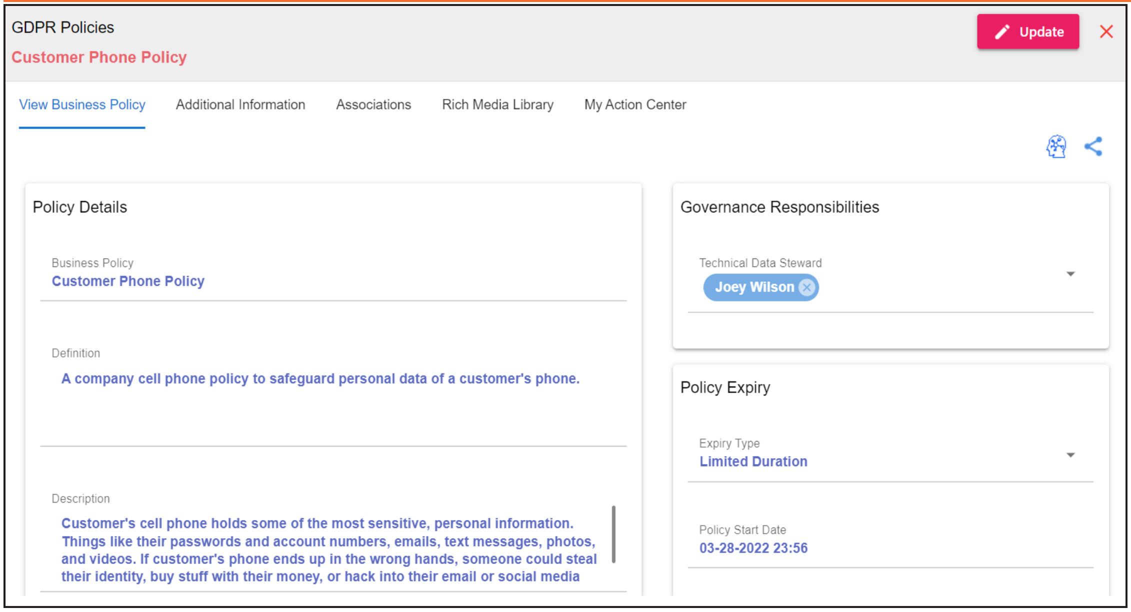
## Viewing Business Policy

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.

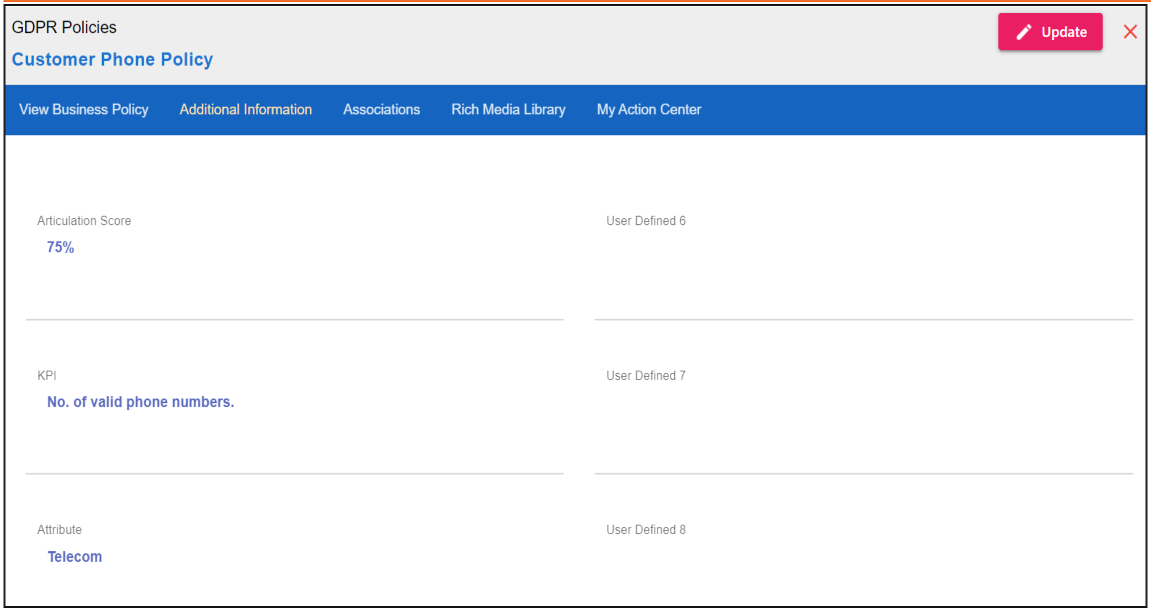



# Additional Information

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.

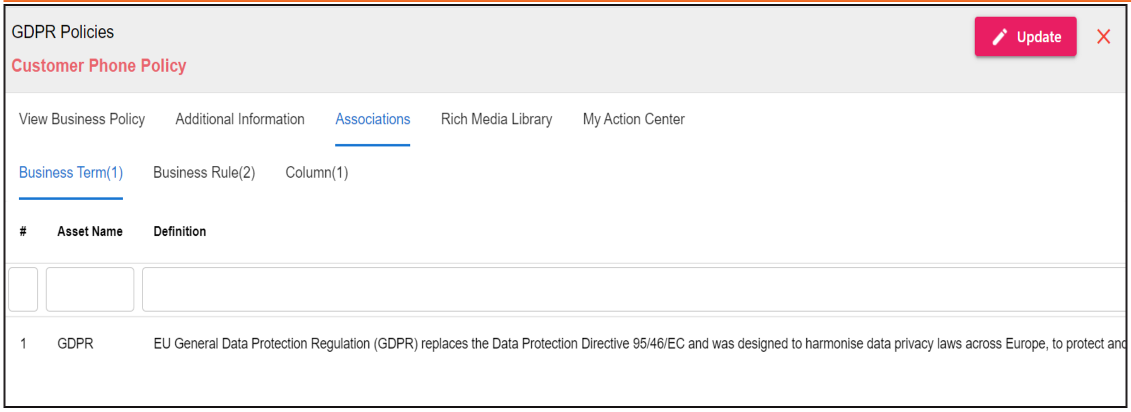



## Associations

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.

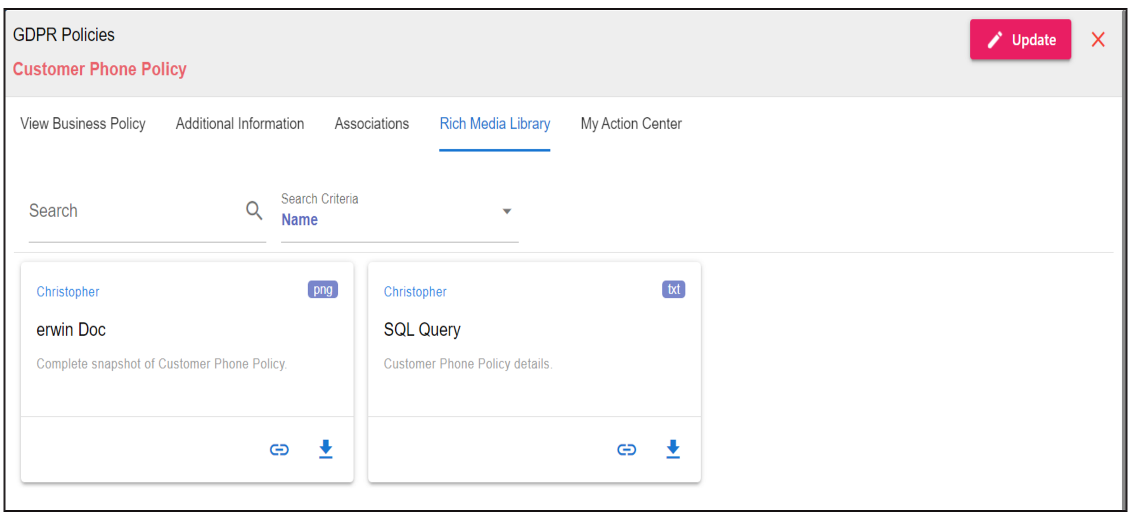



## Rich Media Library

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.




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 ( )**

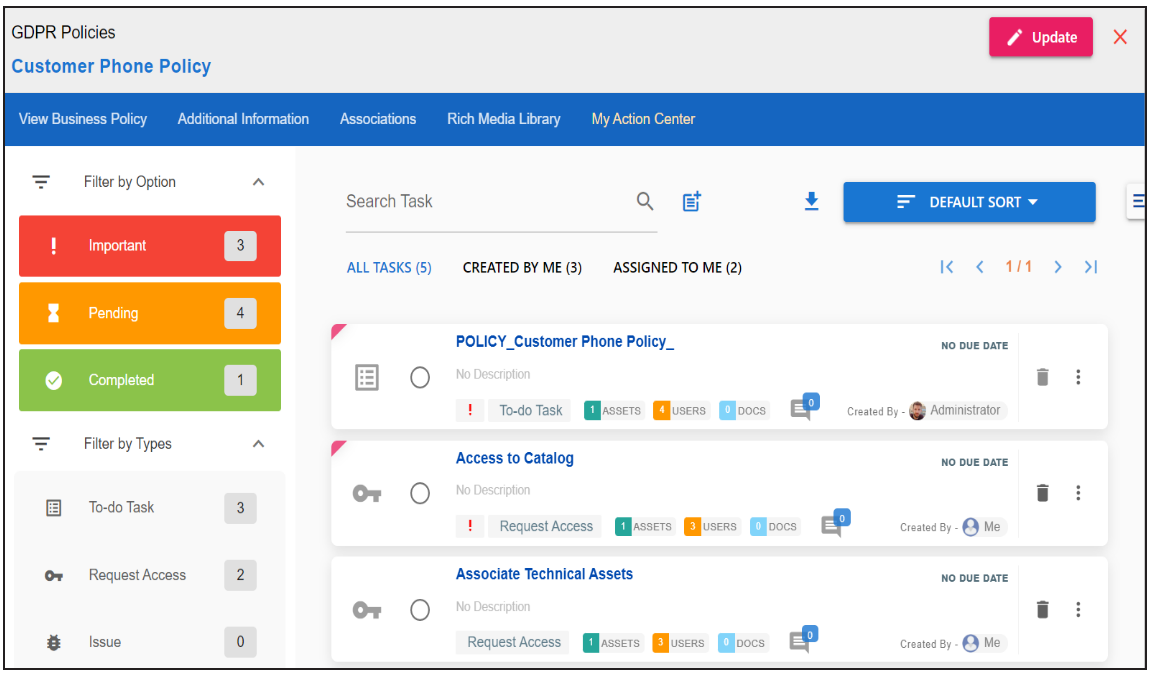
Use this option on a card to open the URL related with a media.

**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.

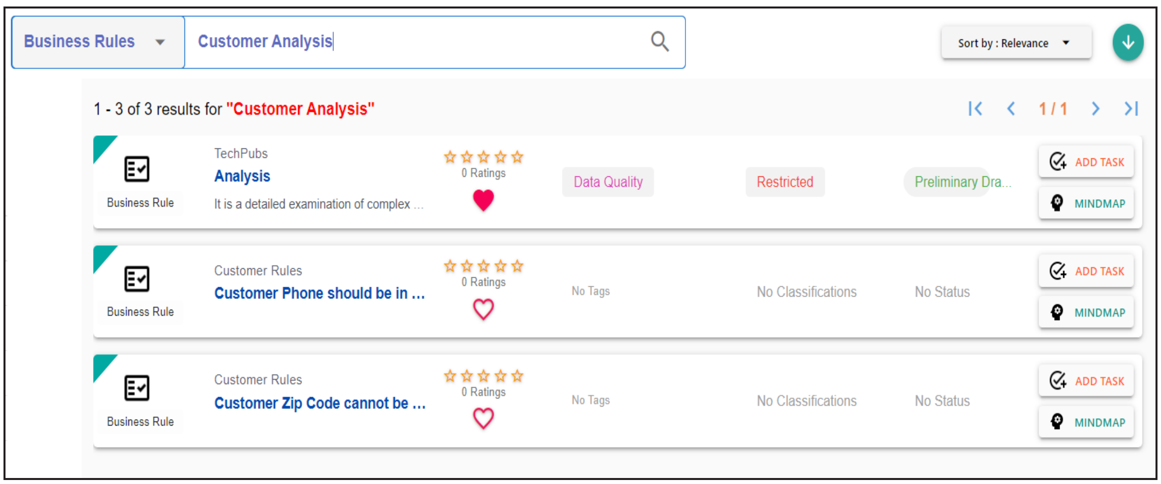


# Business Rules

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.




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

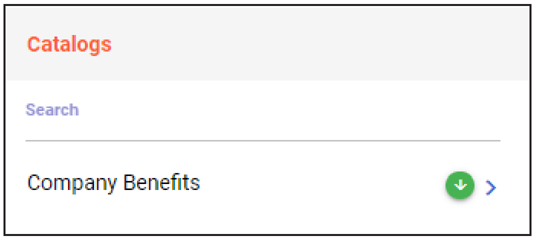
- Add task
- View mind map

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

You can also download business assets in the XLSX format. To download business assets, follow these steps:

1. In the filters pane, click **Explore By Category** and hover over a business asset.

   The download button appears.

2. Click .

   The selected business asset is downloaded in the XLSX format.

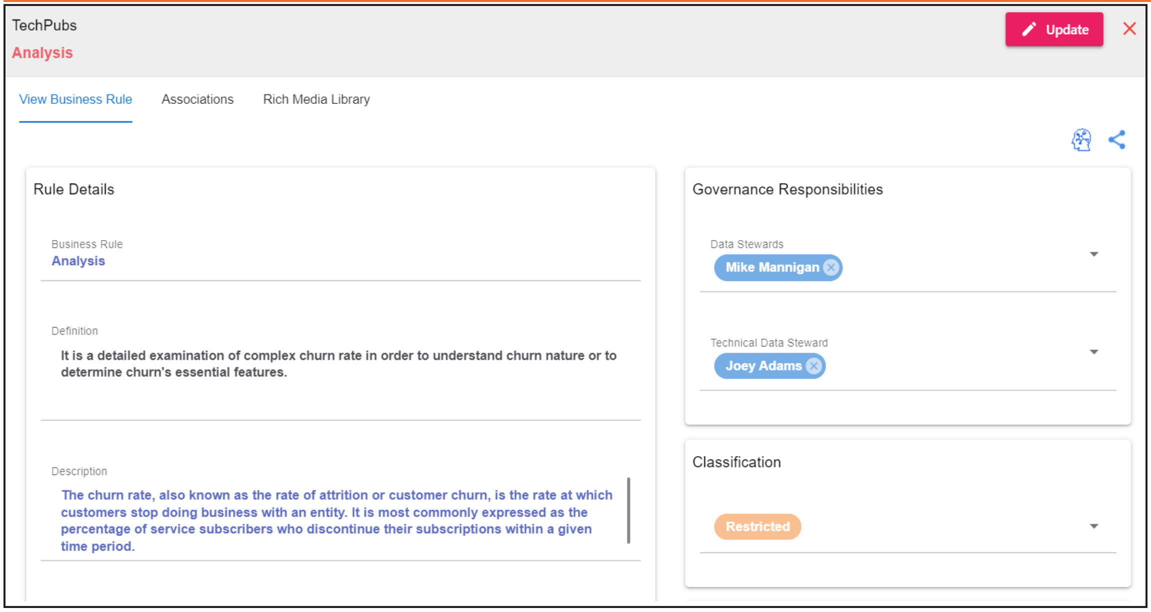
## Viewing Business Rule

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.



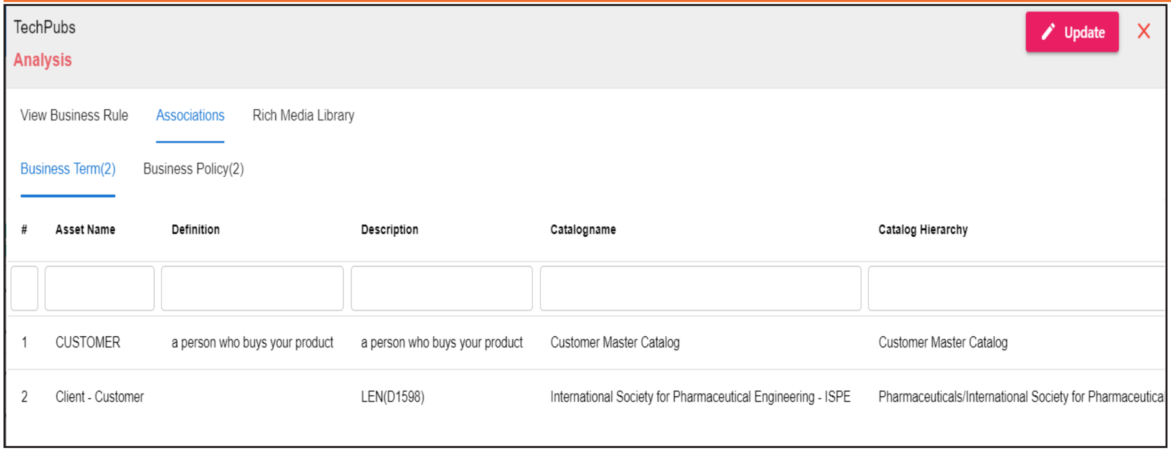

# Associations

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.

## Business Rules

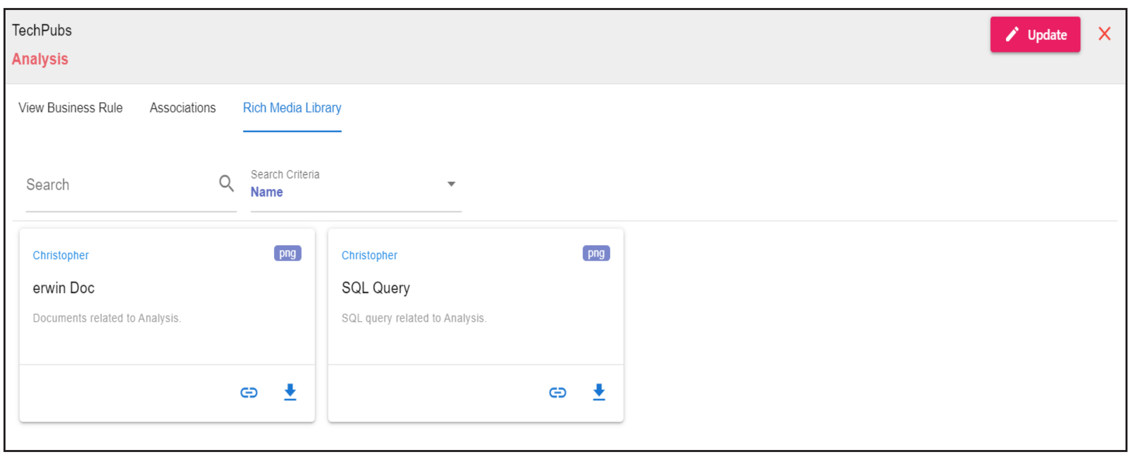



# Rich Media Library

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.




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.

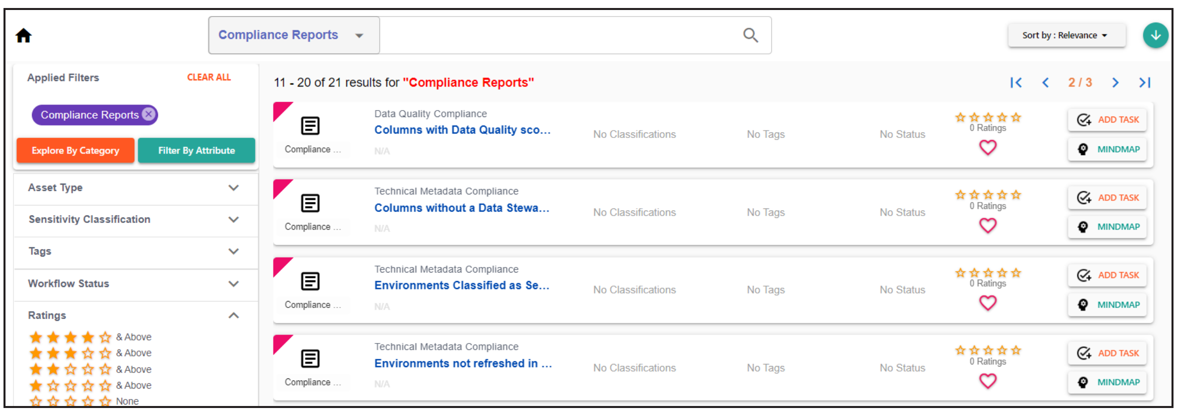
# Compliance Reports

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.




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

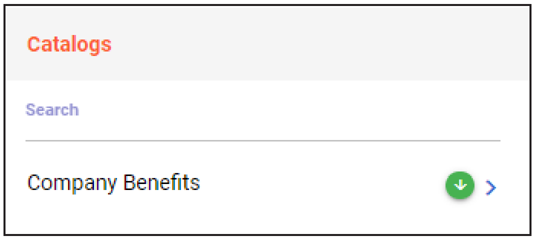
- View report details
- Download reports
- Add tasks

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

You can also download business assets in the XLSX format. To download business assets, follow these steps:

1. In the filters pane, click **Explore By Category** and hover over a business asset.

   The download button appears.




2. Click .

   The selected business asset is downloaded in the XLSX format.

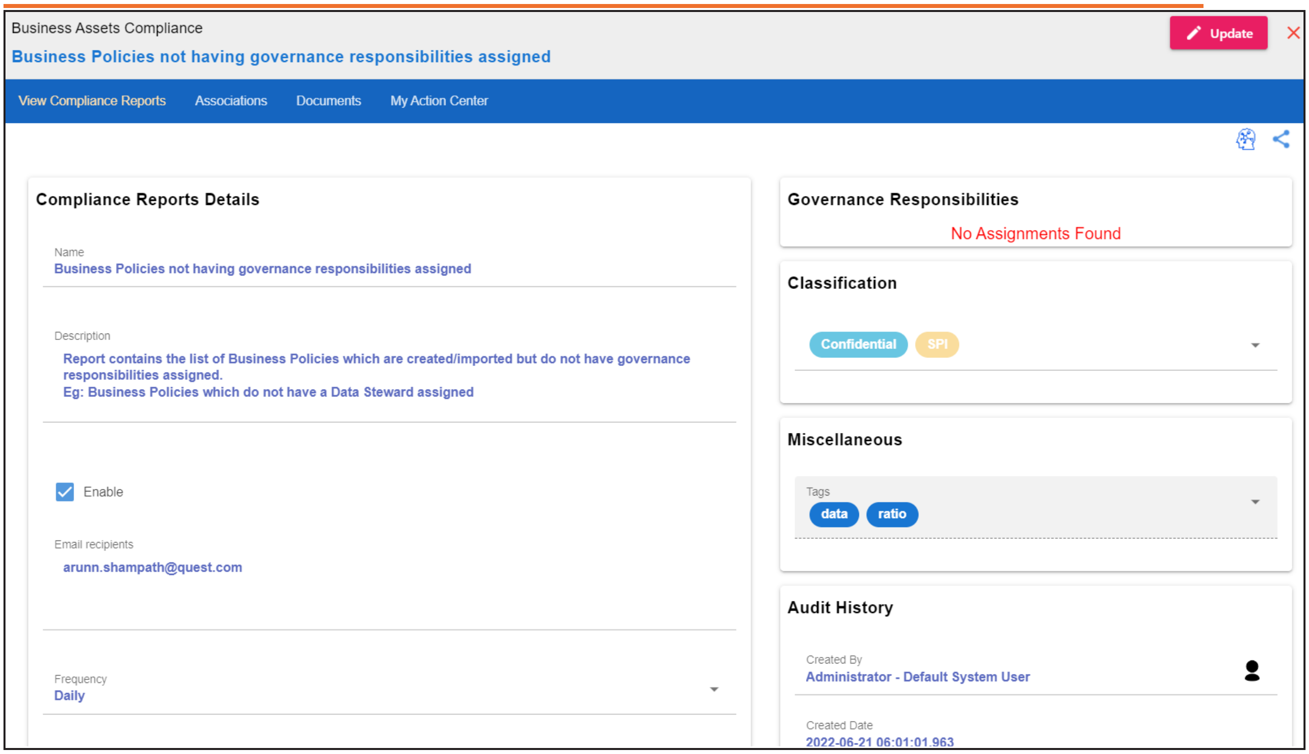
## Viewing Report Details

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

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.



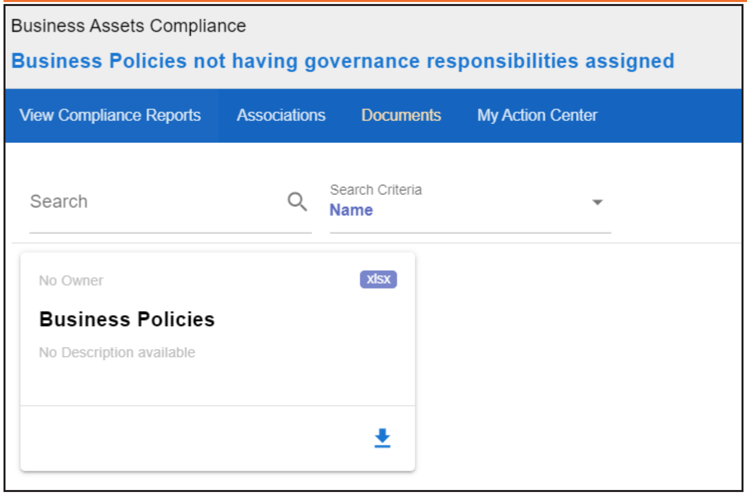

## Downloading Reports

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

To download the report, in 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.

## Compliance Reports



# Reviewing and Rating Assets

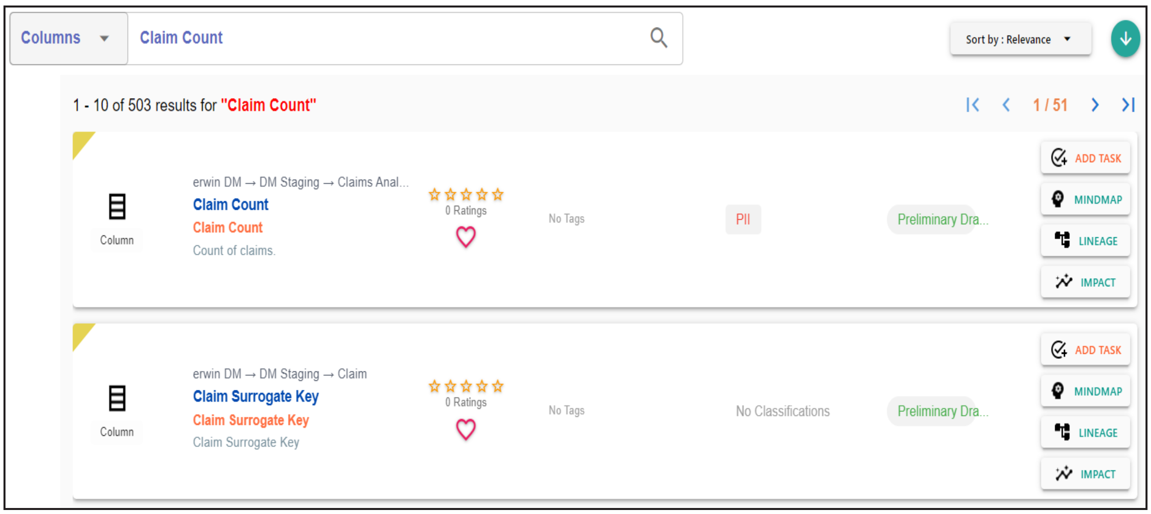
Using the Discover Assets module, you can rate and review data assets. Ratings enable you to maintain data asset quality of an asset and you can support ratings with descriptive reviews.

To review and rate assets, follow these steps:

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

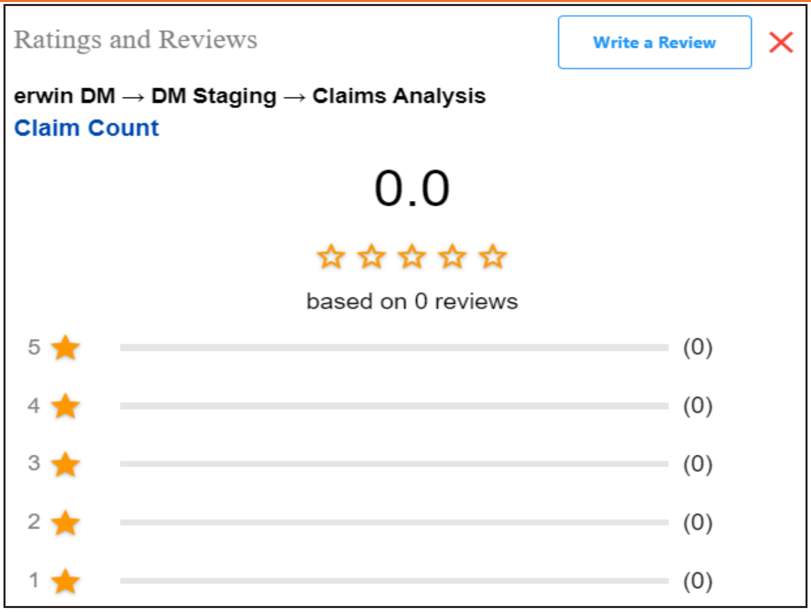
   A list of assets appears. Use the search box to find the required asset from the list.

   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.

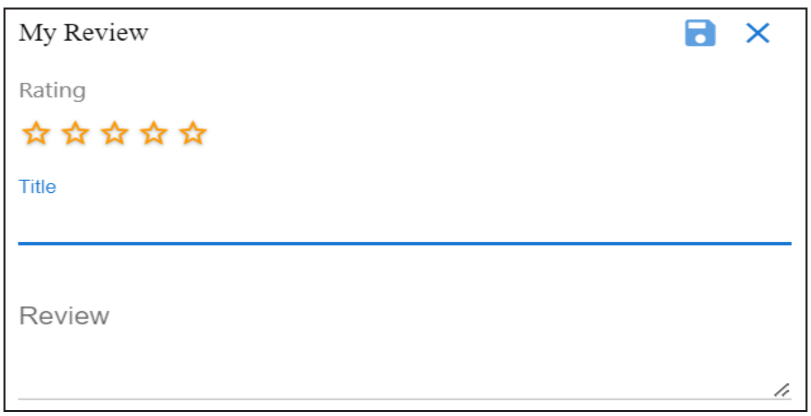
2. Click ratings for the required asset.

   The Ratings and Reviews page appears.




3. Click **Write a Review**.

   The My Review page appears.



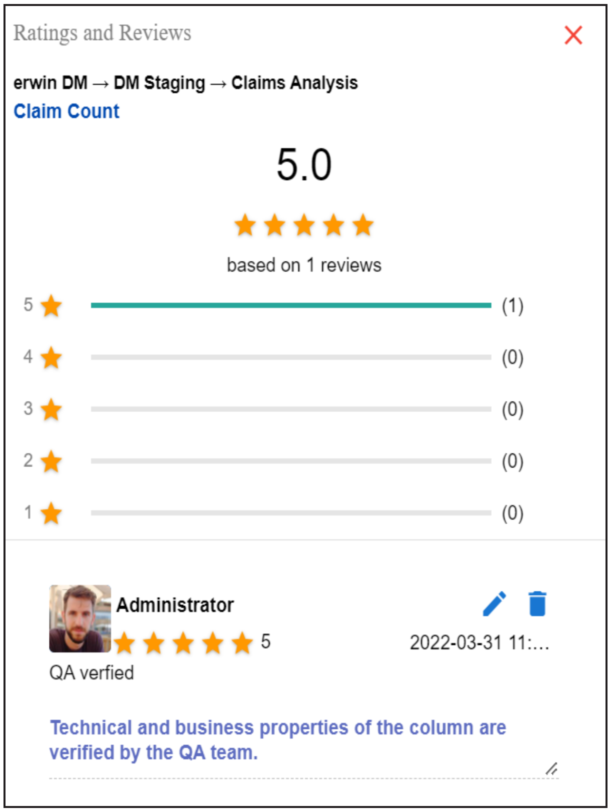

4. Enter appropriate values in the fields. Refer to the following table for field descriptions.

| Field Name | Description |
|---|---|
| Rating | Specifies the rating of the asset on a scale of one to five stars |

| Field Name | Description |
|---|---|
| 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

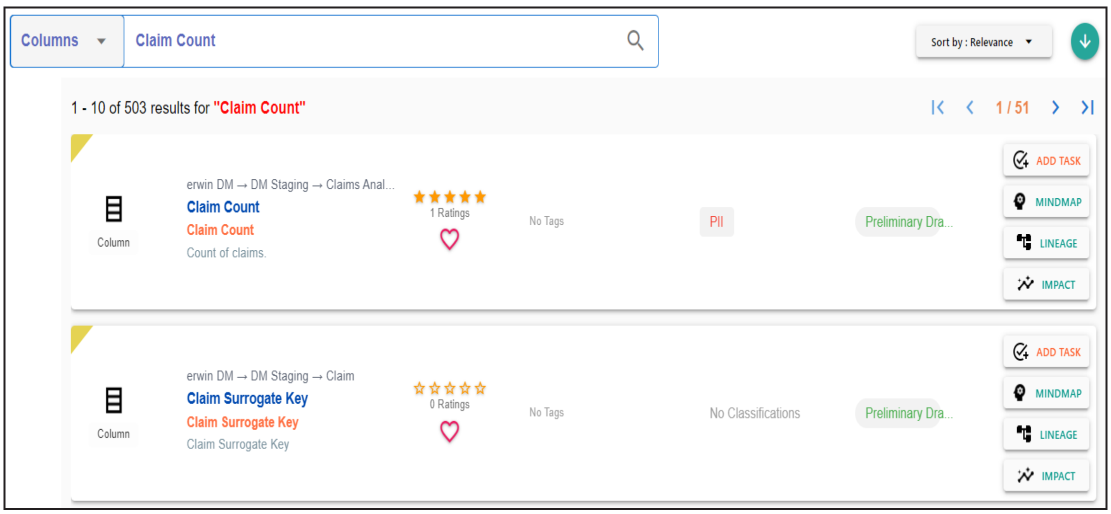
To improve productivity and collaboration, you can create tasks related to technical and business assets. These tasks may be to-do tasks, access requests, or issues. You can manage the task types via Action Center Settings.

To add tasks, follow these steps:

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

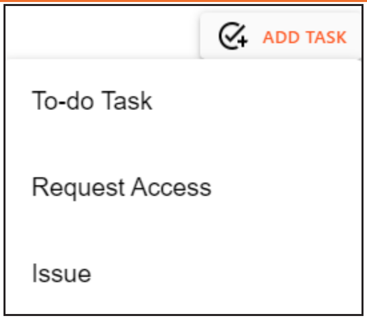
   A list of assets appears. Use the search box to find the required asset.

   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.

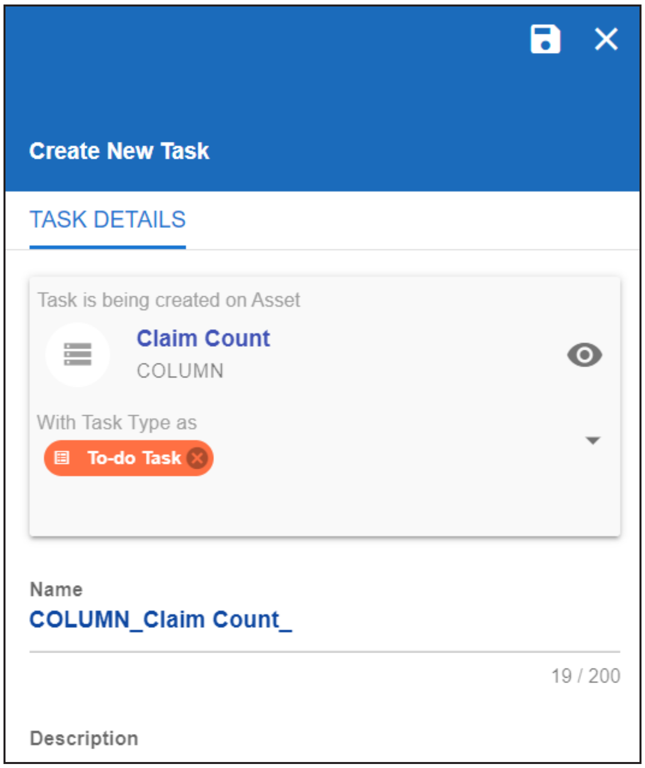

2. Click **Add Task**.

   A list of task types appears.




3. Click the required task type.

   The Create New Task page appears.



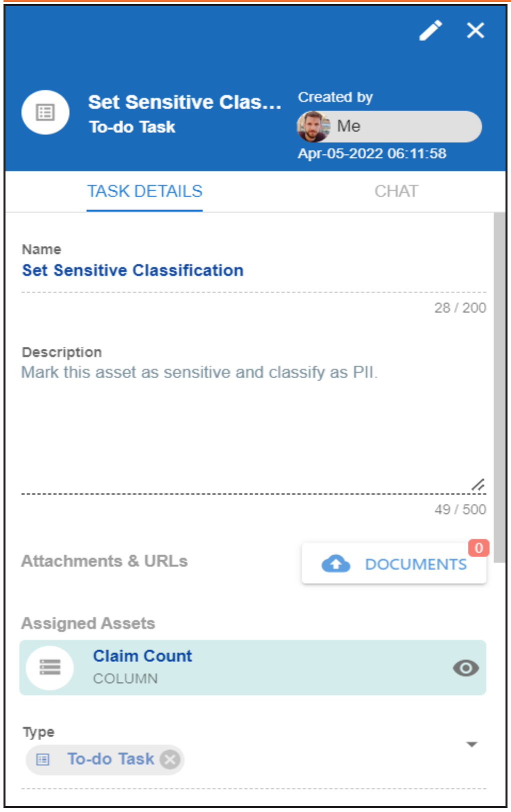

4. Enter appropriate values in the fields. Refer to the following table for field descriptions.

| Field Name | Description |
|---|---|
| Task is being created on Asset | Specifies the asset for which the task is being created. |

| Field Name | Description |
|---|---|
| | For example, Column. |
| With Task Type as | Specifies the task type.<br>For example, To-do Task. |
| Name | Specifies the name of the task.<br>By default, it auto-populates with a name in the following format: <Asset_Type>_<Asset_Name>. You can edit it and rename the task.<br>For example, Set Sensitive Classification. |
| Description | Specifies a description of a task.<br>For example: Mark this asset as sensitive and classify as PII. |
| Important | Specifies whether the task is important |
| Due | Specifies the due date of the task.<br>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.<br>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.<br>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.




## 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:

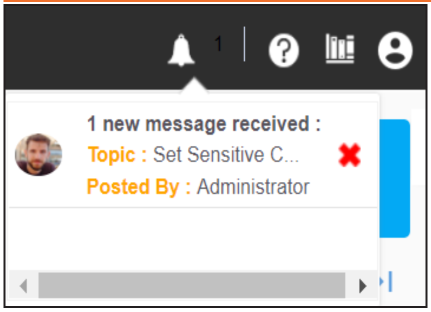
**Assigned**

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.


1
1 new message received :
Topic : Set Sensitive C...
Posted By : Administrator

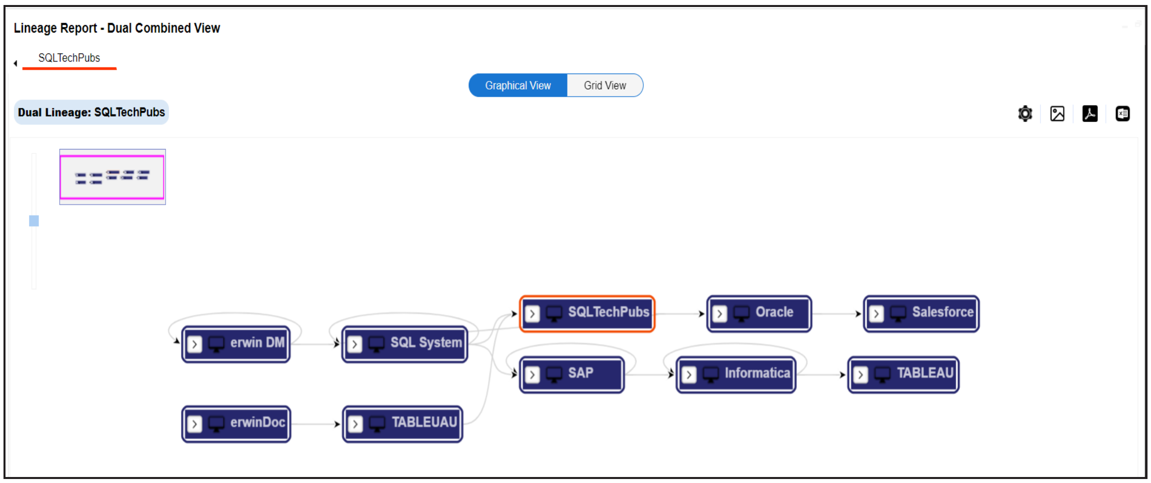
# Viewing Lineage

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

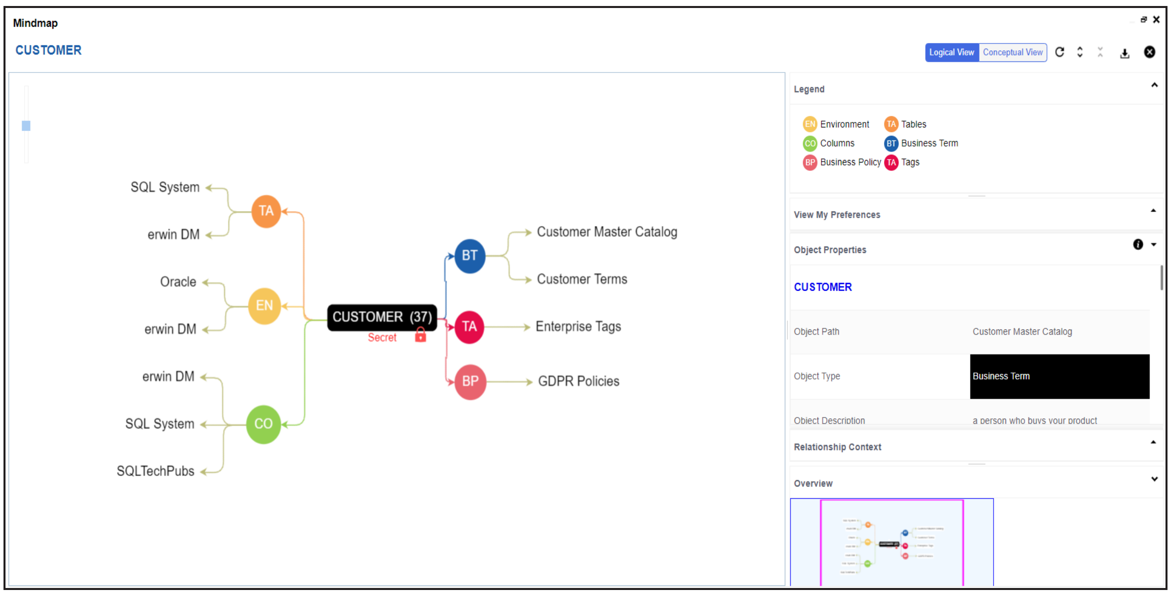
# Viewing Mind Maps

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.

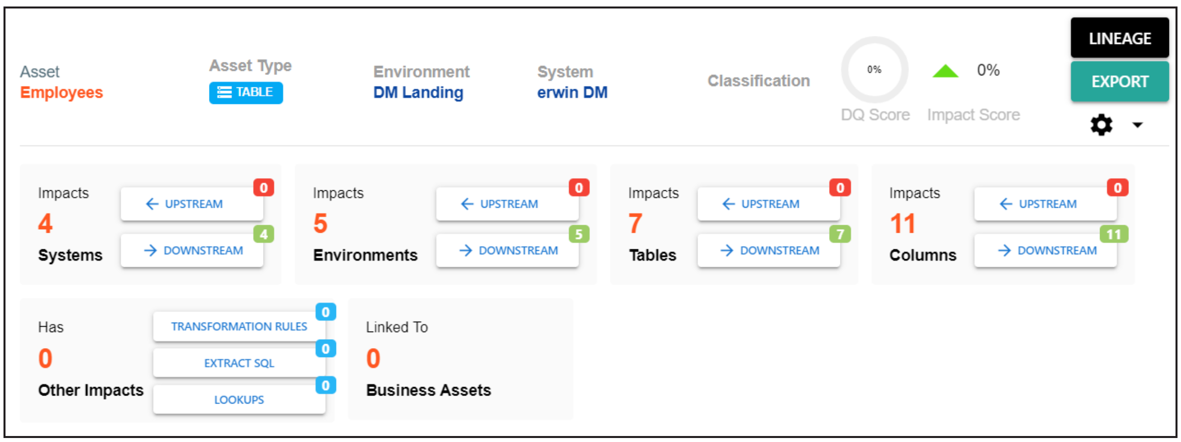
# Viewing Impact

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, and also display links to he source to target mappings. Additionally, impact analysis of tables and columns display:

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

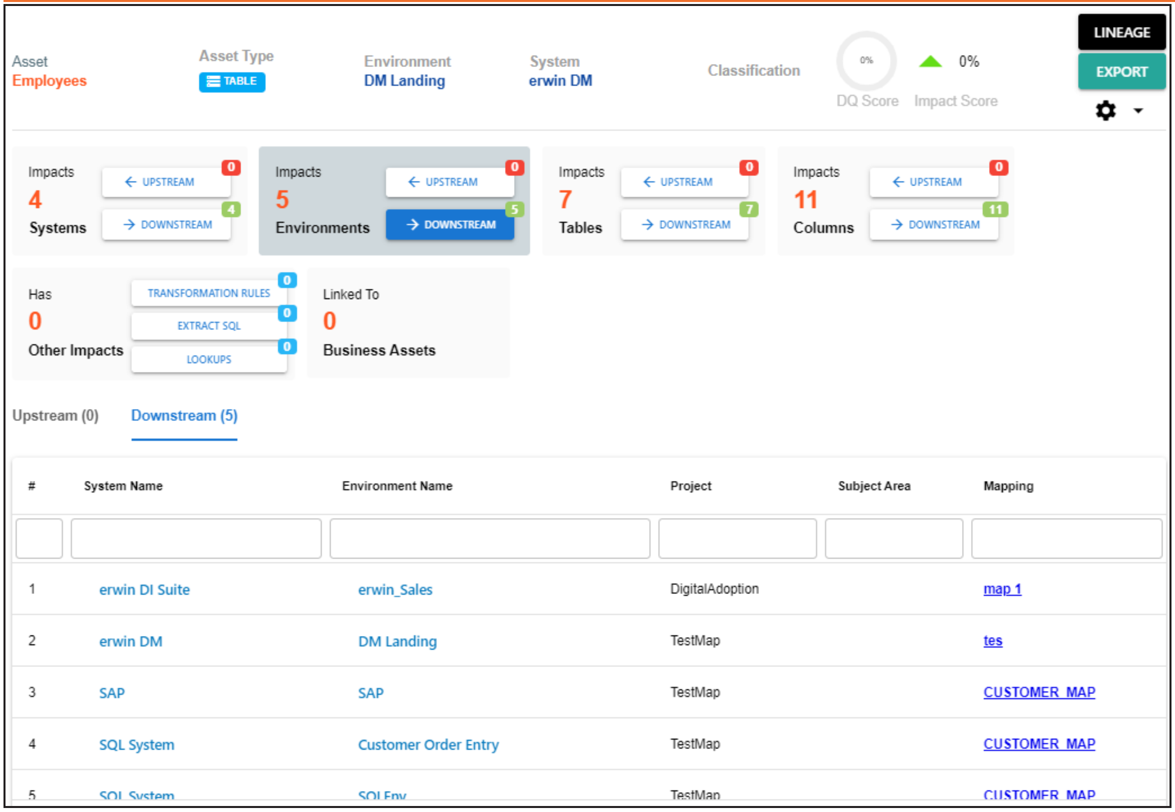
To view impact of an asset, on the <Technical_Asset> tile or page, click **Impact**.

The asset impact page appears.




You can select a card to view upstream or downstream dependencies of the selected asset. Also, the dependent assets are linked to the source to target mapping. You can click the link under the Mapping column to view and update the mappings.

## Viewing Impact




For more information on working on impact of technical assets, refer to the Running Impact Analysis topic.