



## **erwin Data Intelligence**

### **Discover Assets Guide**

**Release v12.1**

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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

### Using Discover Assets

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

The screenshot shows the Discover Assets dashboard for an Administrator. At the top, it says "Hello Administrator - Default System User, How can we help you?" and "Search for an asset or browse the Asset repository to find what you are looking for".

**1** highlights the search bar with a dropdown menu set to "All" and a search icon.

**2** highlights the "Browse by Asset Repository" section, which contains 13 asset categories:

- 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)

**3** highlights the "Browse by Asset Ratings" section:

Rating	Count
4 to 5 Star	0
3 to 5 Star	0
2 to 5 Star	0
1 to 5 Star	0

**4** highlights the "Browse By Tags" section:

Tag	Count
None	28422
Sales	1

**5** highlights the "Browse My Favorite Assets" section, which currently displays "No Favorite Assets Available".

UI Section	Function
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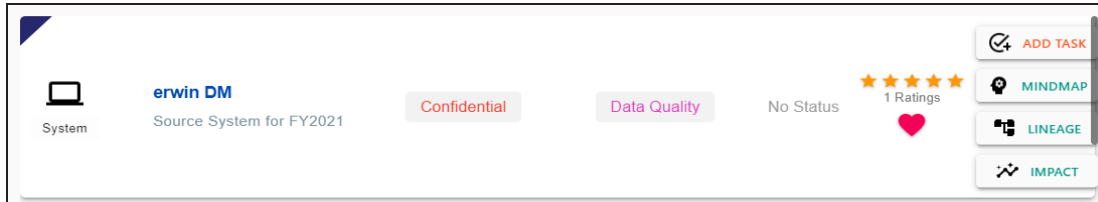
## Using Discover Assets

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](#)



## Using Discover Assets

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- [Viewing impact](#)
- [Viewing compliance reports](#)

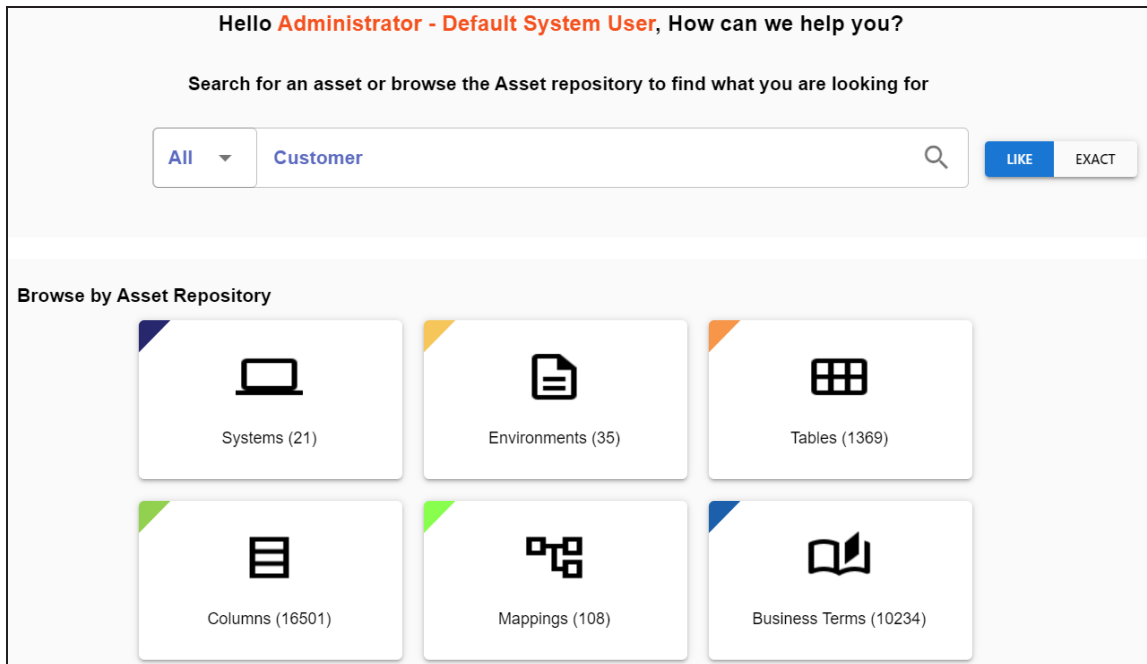
## Searching and Filtering

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

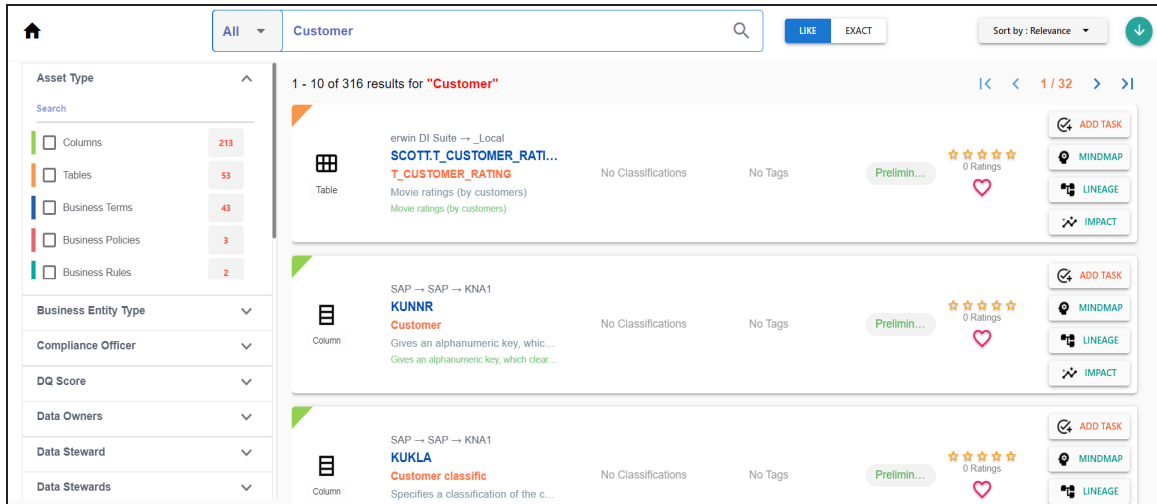
Use this option to get assets that exactly match the search keyword.

## Searching and Filtering

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.



The screenshot displays a search interface with a search bar containing the keyword "Customer". The search results are filtered by "All" asset types. The results list shows three items:

- Table:** erwin DI Suite → \_Local, SCOTT.T\_CUSTOMER\_RATI..., T\_CUSTOMER\_RATING. Description: Movie ratings (by customers). Status: Preliminary, 0 Ratings.
- Column:** SAP → SAP → KNA1, KUNNR, Customer. Description: Gives an alphanumeric key, which... Status: Preliminary, 0 Ratings.
- Column:** SAP → SAP → KNA1, KUKLA, Customer classific. Description: Specifies a classification of the c... Status: Preliminary, 0 Ratings.

Each result includes an "ADD TASK" button and a "LINEAGE" icon.

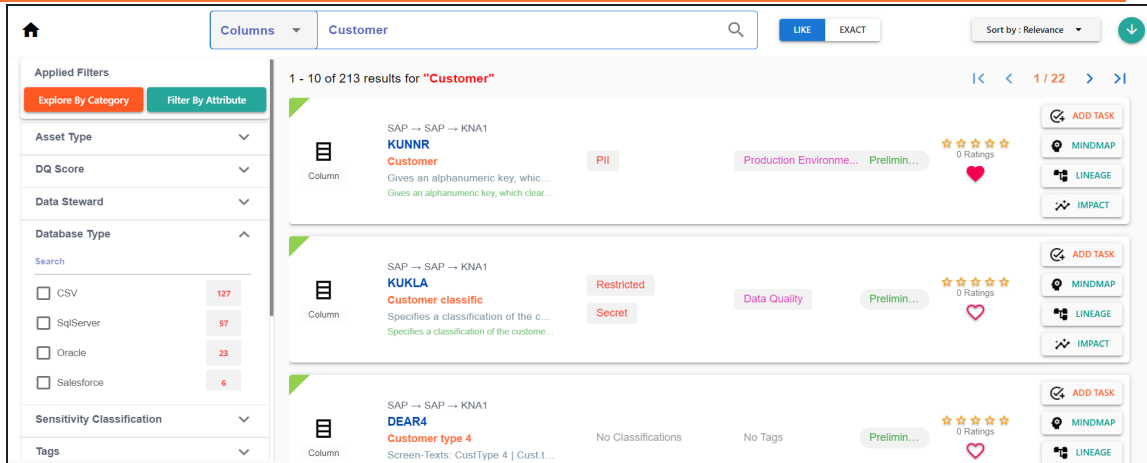
3. In the search box, click **All** to filter search results based on an asset types.

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.

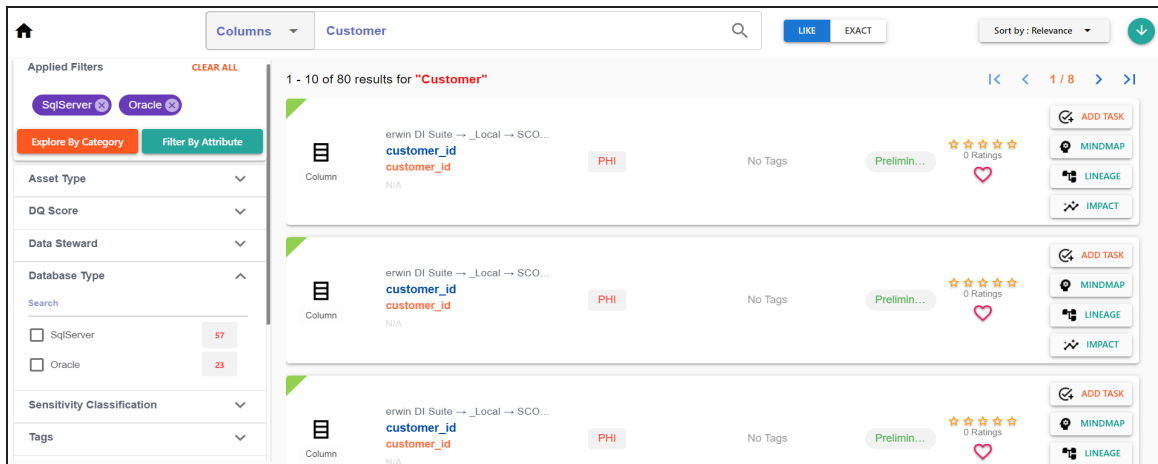
## Searching and Filtering



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.

## Searching and Filtering

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.

The screenshot displays a data management interface. At the top, the 'Applied Filters' section shows 'SqlServer', 'Oracle', and 'Confidential' tags, with a 'CLEAR ALL' button. Below this are 'Explore By Category' and 'Filter By Attribute' buttons. The main search area shows 'Columns' set to 'Customer' and a search bar containing 'Customer'. The results are sorted by 'Relevance' and show '1 - 10 of 22 results for "Customer"'. The results list includes columns like 'CustomerID' and 'CustomerTypeID' with various tags such as 'Confidential', 'QA Verified', 'Beta Release', 'Test Environment', and 'Prelimin...'. The interface also features a sidebar with filters for 'Asset Type', 'DQ Score', 'Data Steward', 'Database Type', 'Search', 'Sensitivity Classification', 'Tags', 'Workflow Status', and 'Ratings'.

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.

## Searching and Filtering

The screenshot displays a search interface with the following elements:

- Applied Filters:** A list of filters including 'SqlServer', 'Oracle', 'Confidential', and 'QA Verified'. A 'CLEAR ALL' button is present.
- Navigation:** Buttons for 'Explore By Category' and 'Filter By Attribute'.
- Search Bar:** Contains the search term 'Customer' and options for 'LIKE' and 'EXACT' search.
- Left Sidebar:** Includes sections for 'Database Type' (with a search for 'SqlServer'), 'Sensitivity Classification', 'Tags', 'Workflow Status', 'Ratings' (with star icons for '4 Above', '3 Above', '2 Above', '1 Above', and 'None'), and 'Favourites' (with a 'Show My Favourites' toggle).
- Search Results:** Shows '1 - 8 of 8 results for "Customer"'. Three results are visible, each for a 'CustomerID' column in a 'SQL System -> Northwind -> dbo...' database. Each result includes tags like 'Confidential', 'QA Verified', 'Beta Release', 'Test Environment', 'Production Environme...', 'Prelimin...', and '0 Ratings'. Action buttons for 'ADD TASK', 'MINDMAP', 'LINEAGE', and 'IMPACT' are available for each result.

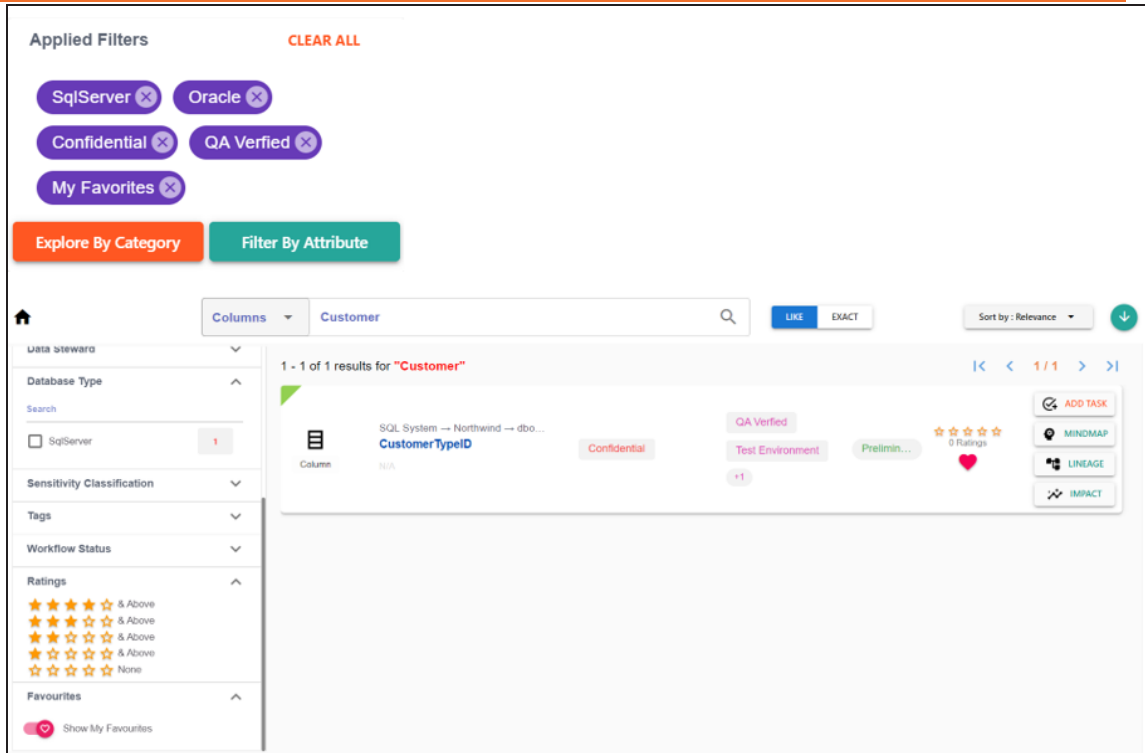
### 7. Switch **Show My Favorites** to on.

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.

## Searching and Filtering



8. Click **<Asset\_Name>** to view asset properties.

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

## Searching and Filtering

The screenshot displays a data catalog interface for a column named 'CustomerTypeID'. The breadcrumb path is 'SQL System → Northwind → dbo.CustomerCustomerDemo'. The column is categorized as 'Confidential', 'QA Verified', and 'Test Environment'. A 'DQ Score' of 10% is shown, along with buttons for 'Mindmap', 'Lineage', 'Impact', 'Add Task', and 'Update'. The interface includes a navigation bar with 'Column Properties', 'Related Assets', 'Additional Information', and 'Rich Media Library'. The main content area is divided into 'Business Information' and 'Column Properties'.

**Business Information**

Data Steward

Logical Name  
**CustomerClassificationNumber**

Definition  
This column identifies a customer by its classification.

Comments  
It is undergoing QA process.

**Column Properties**

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

**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

## 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.

The screenshot displays the Discover Assets interface. On the left is a filter pane with a search bar containing 'Business Terms'. Below the search bar are two buttons: 'Explore By Category' (orange) and 'Filter By Attribute' (green). The filter pane lists various attributes with dropdown menus: Asset Type, Compliance Officer, Data Owners, Data Stewards, Sensitivity Classification, Tags, Technical Data Steward, Workflow Status, Available, Options, Preference, Radio, and Ratings. The 'Available' filter is highlighted in blue. On the right, the search results are displayed under the heading '1 - 10 of 10237 results for Browsing "Business Terms"'. The results list includes:

- Monetary Terms → Macroeconomics  
**3 -Hydroxyl End**  
Business Term  
The hydroxyl group that is attached to the 3 c...  
No Classifications
- TechPubs2  
**3-A Sanitary Standards Inc - 3-A SSI**  
Business Term  
3-A Sanitary Standards, Inc. (3-A SSI) is a no...  
PHI
- Pharmaceuticals → International Society for ...  
**5 End**  
Business Term  
The phosphate group that is attached to the 5...  
PHI
- Pharmaceuticals → International Society for ...  
**510 - K Device**  
Business Term  
A medical device that is considered substanti...  
PHI
- Pharmaceuticals → PharmaIQ  
**A New Glossary**  
Business Term  
New Glossary Term  
PHI
- Pharmaceuticals → International Society for ...  
**A per D**  
Business Term  
Analog/Digital  
PHI

3. In the filter pane, expand the custom filter, select a 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.

## Searching and Filtering

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.

The screenshot displays a search interface with a sidebar on the left and a main results area on the right. The sidebar contains a search bar at the top with the text "Business Terms" and a dropdown arrow. Below the search bar is a section titled "Applied Filters" with a "CLEAR ALL" link. Three filters are applied: "Business Terms", "Outline", and "Summer". Below the filters are two buttons: "Explore By Category" and "Filter By Attribute". The sidebar also features several filter categories: "Asset Type", "Sensitivity Classification", "Tags", "Workflow Status", "Available", "Options", "Search", and "Preference". The "Search" section has a search input and an "APPLY FILTERS" button. Below the search input are three checkboxes: "Outline" (checked), "Summer" (checked), and "All of the above" (unchecked). The main results area shows "1 - 3 of 3 results for Browsing 'Business Terms'". There are three results listed, each with a book icon, a "Business Term" label, and a "No Classifications" status. The results are: "Company Benefits Business Sites", "Company Benefits Business Insider", and "Company Benefits Customer Phone (Personal) on air".

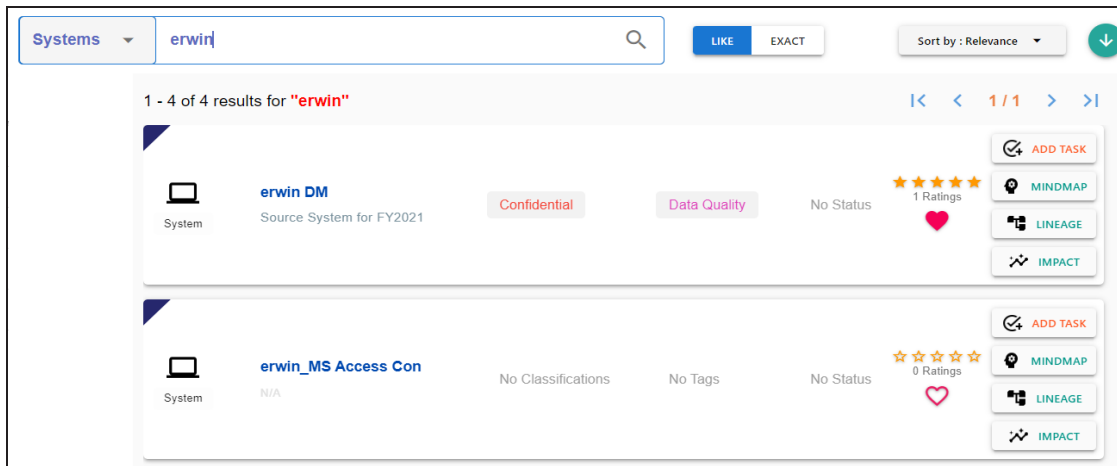
Business Term	Classifications
Company Benefits Business Sites	No Classifications
Company Benefits Business Insider	No Classifications
Company Benefits Customer Phone (Personal) on air	No Classifications

## 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.

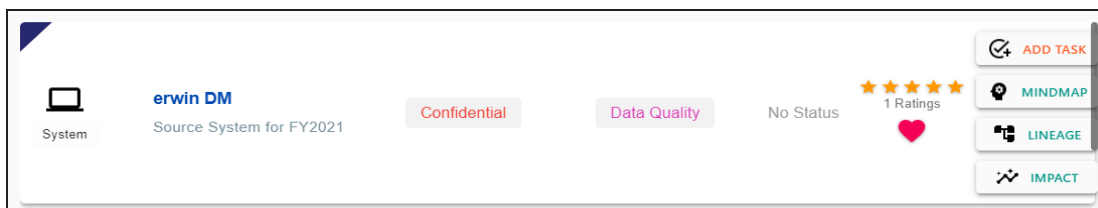
To view the systems list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Systems** card.

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.

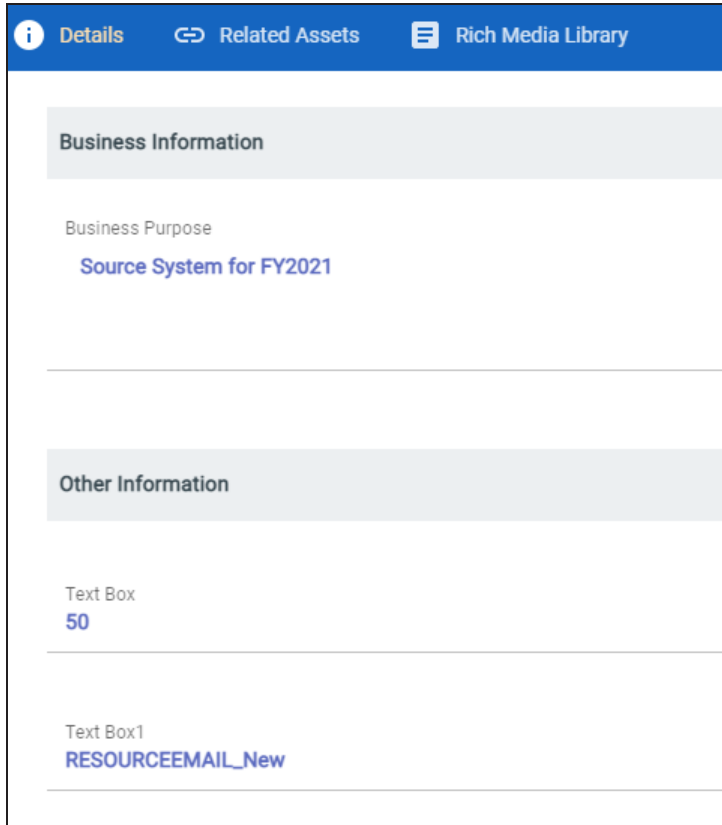
## Systems

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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.

## Systems

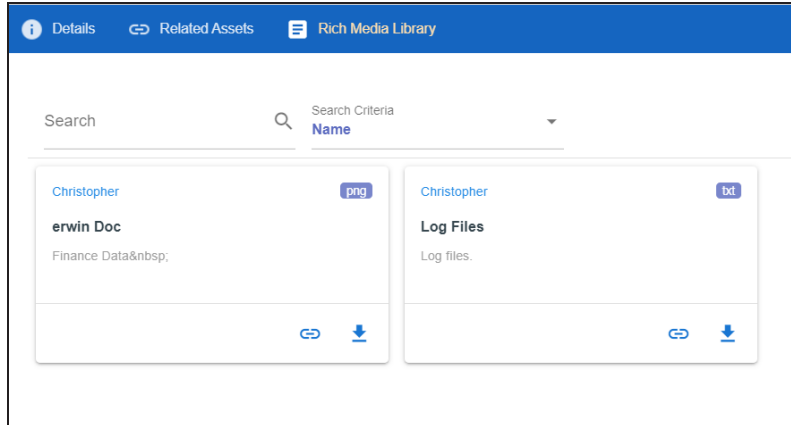
#	Asset Name	Definition	Description
1	Agile Testing	software testing practice that follows the principles of agile software development is called Agile Testing. Agile is an iterative development methodology, where requirements evolve through collaboration between the customer and self-organizing teams and agile aligns development with customer needs.	Testing is NOT a Phase: Agile testing is the only way to ensure continuous product quality. Testing Moves the project Forward considered as quality gate but at the end the product meets the business requirements.
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.

## Systems

---

### 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:

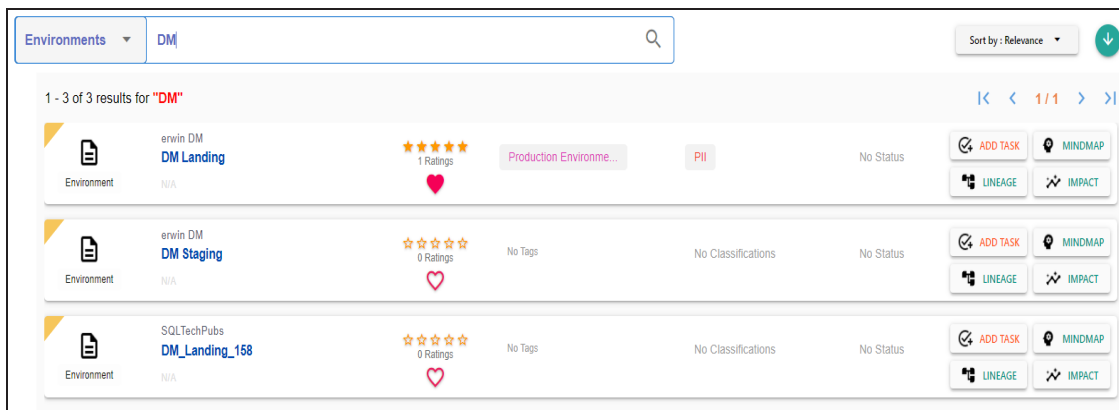
- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace system's origin and destination after source to target mappings. For more information on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

## Environments

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.

The screenshot shows the 'erwin DM' interface for the 'DM Landing' environment. The top navigation bar includes 'Environment Details', 'Related Assets', and 'Rich Media Library'. The 'Business Properties' section shows 'Database Type' as 'ERWin'. The 'Extended Properties' section shows 'Modules' as 'Group'. The metadata section includes 'Created By', 'Last Modified By', and 'Last Refreshed By' information, all attributed to 'Administrator - Default System User'. The 'Explore Tables' section shows a search bar and two table entries: 'Employees' and 'Citizens'.

## 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' interface for the 'DM Landing' environment, with the 'Related Assets' tab selected. The table below lists two 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

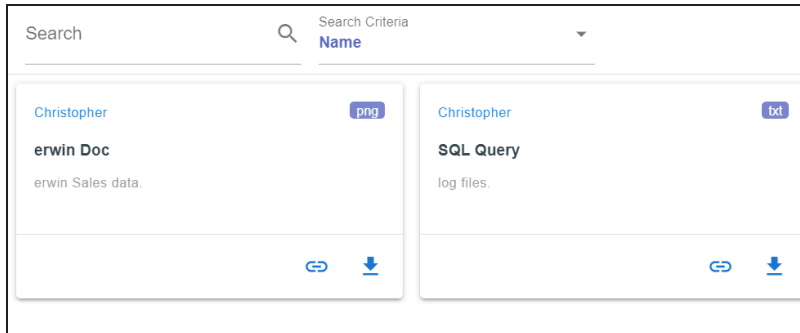


## Rich Media Library

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.

## Environments

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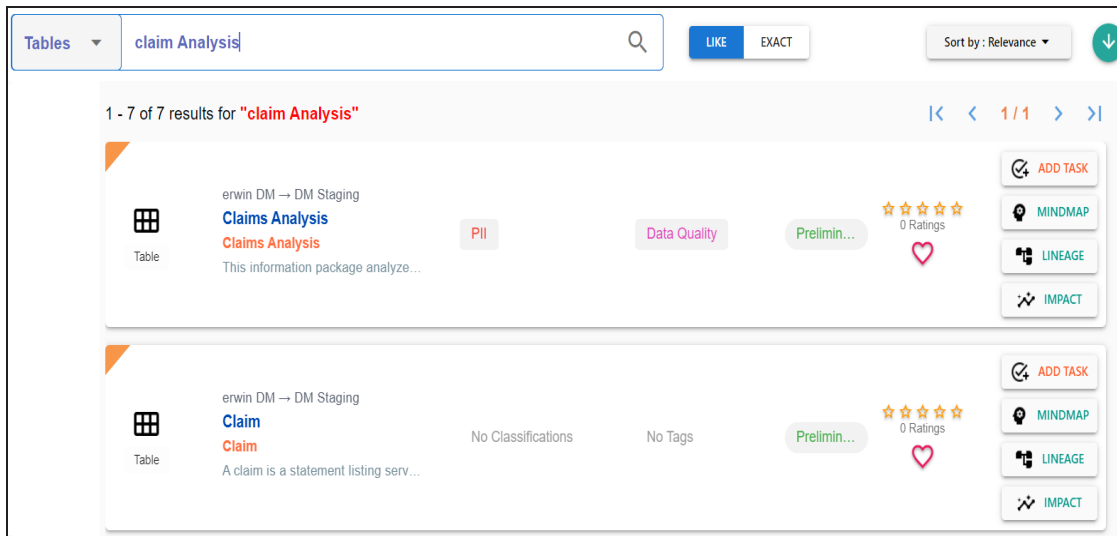
- **Lineage:** Use this option to trace environment's origin and destination after source to target mappings. For more information on lineage, refer to the [Viewing Lineage](#) topic.
- **Impact:** Use this option to analyze the impact of an environment as source and target. For more information on impact,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

## Tables

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.

The screenshot displays the 'Claims Analysis' table properties in the Erwin DM interface. The header shows the table name, a 10% DQ Score, and buttons for Mindmap, Lineage, Impact, Add Task, and Update. The main content area is divided into Business Properties and Extended Properties sections.

**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);

**Metadata**

- 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**

Column Name	Column Name	Count
Claim Surrogate...	Claim Surrogate...	0
Date Identifier	Date Identifier	0
Member Key	Member Key	0
Claim Count	Claim Count	0
Claim Amount US...	Claim Amount US...	0
Claim Surrogate...	Claim Surrogate...	0
Date Identifier	Date Identifier	0
Member Key	Member Key	0

## 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.

## Tables

#	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, a

## 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.

## Tables

The screenshot displays the 'erwin DM - DM Staging' interface for a table named 'Claims Analysis'. The top navigation bar includes 'Table Properties', 'Related Assets', 'Additional Information', and 'Rich Media Library'. The main content area shows a grid of table properties:

Filegroup Default	Text Image	Filestream Filegroup Null
Filestream Partition Scheme myRangePS1	Change Tracking Disable	Track Columns Updated On
Lock Escalation Type Auto	Vardecimal Storage Format True	User Defined-9
User Defined-10		

## 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.

The screenshot shows the 'Rich Media Library' interface with a search bar and a dropdown menu set to 'Name'. Two artifact cards are displayed:

- Christopher** (png): erwin Doc, erwin Sales. Includes share and download icons.
- Christopher** (txt): Log Files, Log Files. Includes share and download icons.

Use the following options to work on the artifacts:

## Tables

---

### 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:

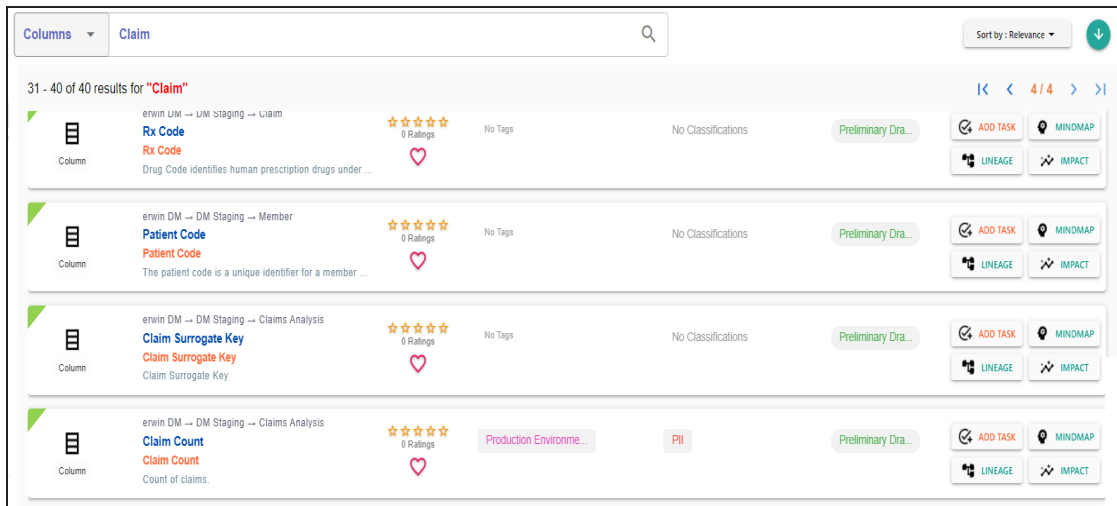
- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace table's origin and destination after source to target mappings. For more information on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



## Columns

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.

The screenshot shows the details for the 'Claim Count' column. It is divided into two main sections: 'Business Properties' and 'Extended Properties'.

- 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.

The screenshot shows the 'Claim Count' column details in erwin DM, with the 'Related Assets' tab selected. The interface includes a top navigation bar with 'erwin DM -- DM Staging -- Claims Analysis' and 'Claim Count'. Below the navigation bar, there are tabs for 'Column Properties', 'Related Assets', 'Additional Information', and 'Rich Media Library'. The 'Related Assets' tab is active, showing a list of associated assets.

#	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.

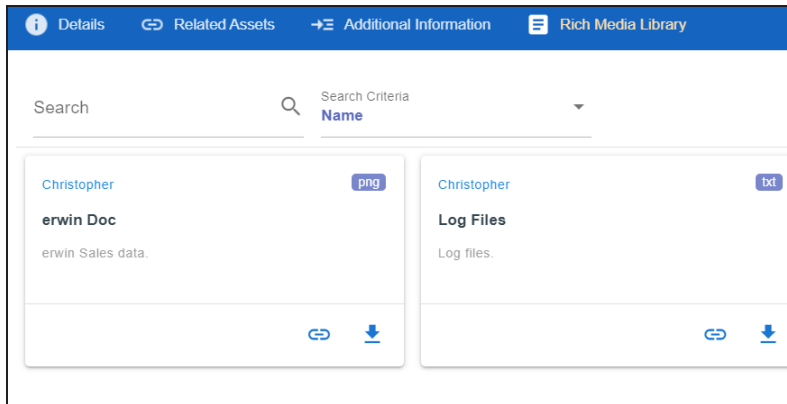
With Language Settings, you can set UI labels of user defined fields. Use Column Metadata section under User Defined Flex Fields to configure these UI labels. For more information, refer to the [Configuring Language Settings](#) topic.

## Rich Media Library

A column 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

## Columns

---

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 columns. Use the following options:

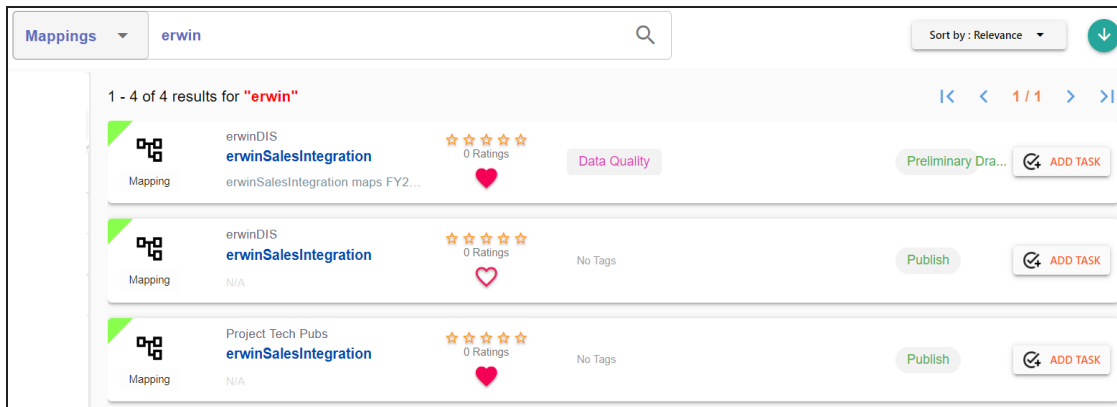
- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace column's origin and destination after source to target mappings. For more information on 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
<a href="#">Map Spec Overview</a>	Under this, you can view map details, workflow status, and audit history of a map.
<a href="#">Map Spec Grid</a>	Under this, you can analyze mapping specifications and view its source, target, and transformation details.
<a href="#">Graphical Designer</a>	Under this, you can view source to target mappings in a graphical view.
<a href="#">Source Extract SQL</a>	Under this, you can view: <ul style="list-style-type: none"> <li>SQL Query relevant to a mapping specification</li> <li>SQL Query Description</li> </ul>

## Mappings

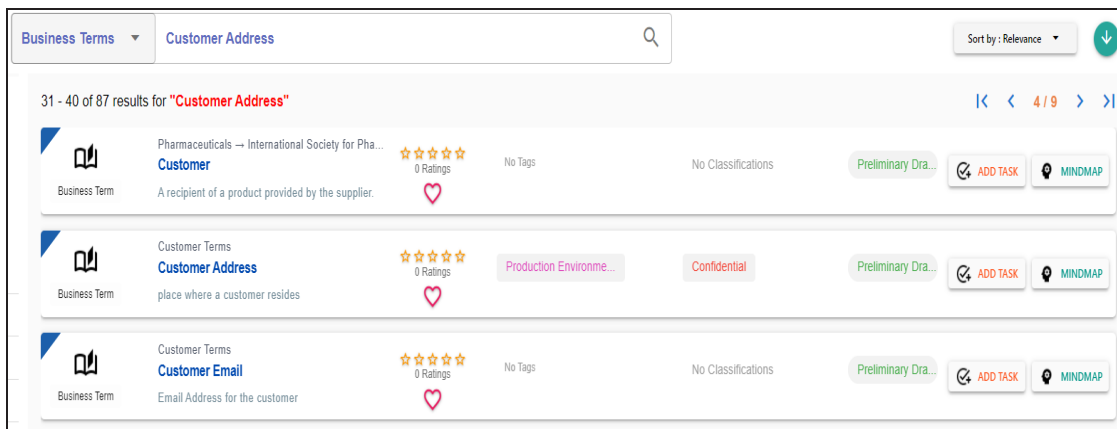
Tab	Description
<a href="#">Target Update Strategy</a>	Under this, you can view target update strategy of a map.
<a href="#">Testing Notes</a>	Under this, you can view relevant testing notes with respect to a mapping specification.
<a href="#">Map Specs Docs</a>	Under this, you can view the uploaded documents related to a mapping specification.
<a href="#">Assignment</a>	Under this, you can view users assigned to a mapping specification.
<a href="#">Release Information</a>	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 <a href="#">UI labels</a> .
<a href="#">Extended Properties</a>	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.

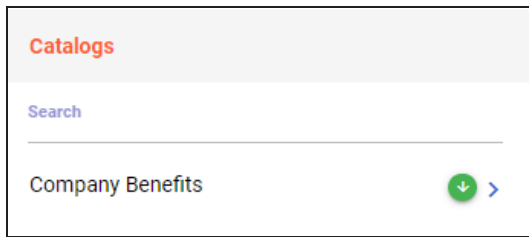
You can also download business assets in the XLSX format. To download business assets, follow these steps:

## Business Terms

---

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.

## Business Terms

The screenshot shows the 'Customer Terms' management interface for a specific term, 'Customer Address'. The interface is divided into several sections:

- Header:** 'Customer Terms' with a logo and 'Customer Address' in red. An 'Update' button is in the top right.
- Navigation:** 'View Business Term' (active), 'Additional Information', 'Associations', 'Rich Media Library', and 'Collaboration Center'.
- Term Details:** A large section on the left with a toggle for 'Acronym'. It contains fields for 'Business Term' (Customer Address), 'Definition' (place where a customer resides), 'Description' (place where a customer resides), and 'Notes'.
- Governance Responsibilities:** A section on the right with dropdown menus for 'Data Stewards' (Mike Mannigan, Mike Menza) and 'Compliance Officer' (Saras Ojha).
- Classification:** A section on the right with a dropdown menu set to 'Confidential'.
- Miscellaneous:** A section on the right with a 'Tags' dropdown menu set to '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.



## Business Terms

The screenshot displays the 'Customer Terms' interface for 'Customer Address'. At the top, there is a header with a book icon, the text 'Customer Terms', and 'Customer Address' in blue. A red 'Update' button with a close icon is in the top right. Below the header is a blue navigation bar with tabs: 'View Business Term', 'Additional Information', 'Associations', 'Rich Media Library', and 'My Action Center'. The main content area is divided into three rows, each with a metric on the left and a user-defined asset on the right:

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

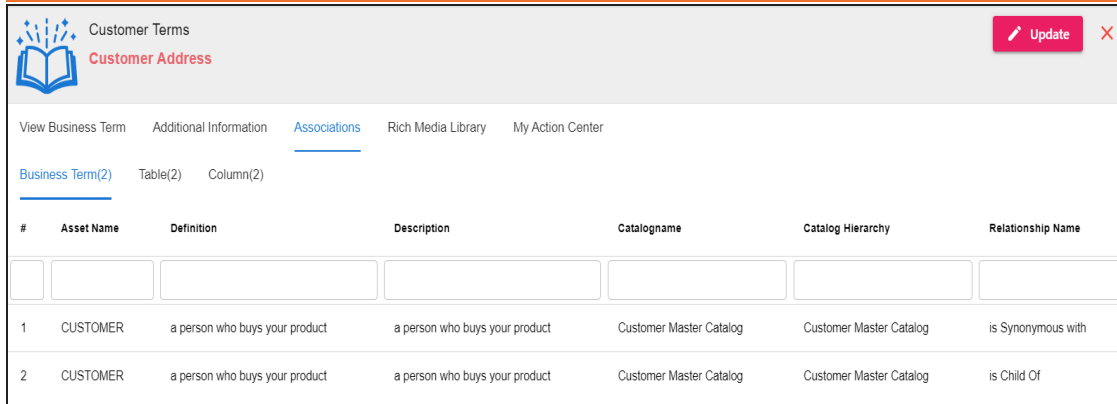
## Associations

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.

## Business Terms



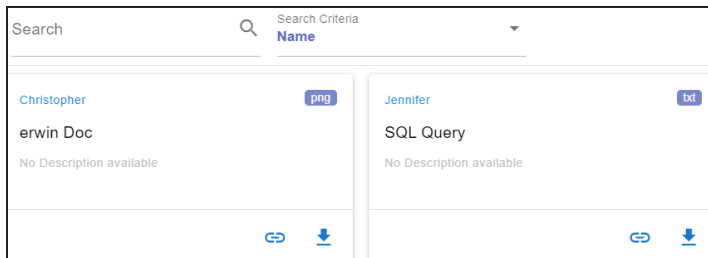
#	Asset Name	Definition	Description	Catalogname	Catalog Hierarchy	Relationship Name
1	CUSTOMER	a person who buys your product	a person who buys your product	Customer Master Catalog	Customer Master Catalog	is Synonymous with
2	CUSTOMER	a person who buys your product	a person who buys your product	Customer 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.

## Business Terms

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](#).

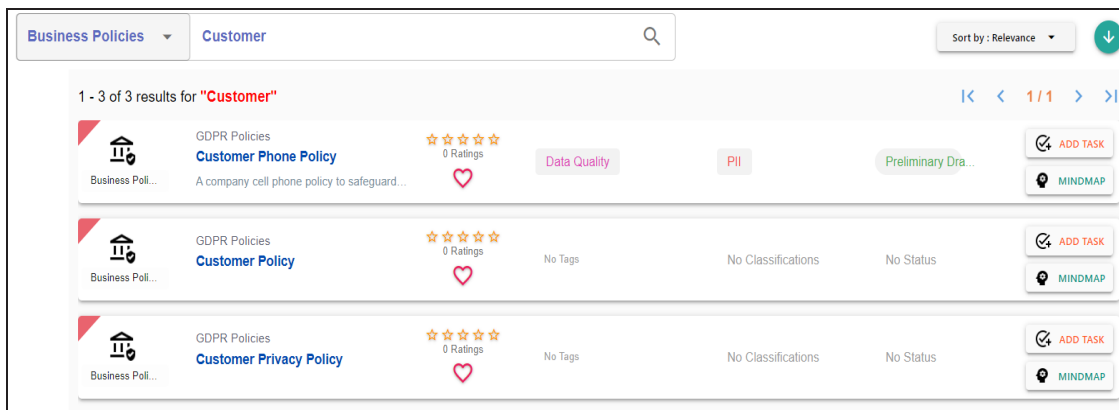
The screenshot displays the 'My Action Center' interface for a 'Customer Term' titled 'Customer Address'. The interface includes a top navigation bar with tabs for 'View Business Term', 'Additional Information', 'Associations', 'Rich Media Library', and 'My Action Center'. A search bar and a 'Search Task' input field are present. Below the search bar, there are filters for 'ALL TASKS (7)', 'CREATED BY ME (2)', and 'ASSIGNED TO ME (5)'. The main content area shows two task cards: 'Add Additional Information' and 'Associate with codesets'. Each card includes a title, a description, a 'NO DUE DATE' indicator, and a list of associated items (To-do Task, ASSETS, USERS, DOCS) with counts. The 'Add Additional Information' card shows 1 To-do Task, 1 ASSET, 5 USERS, and 0 DOCS. The 'Associate with codesets' card shows 1 To-do Task, 1 ASSET, 4 USERS, and 0 DOCS. A sidebar on the left provides filters by option (Important: 6, Pending: 6, Completed: 1) and by types (To-do Task: 6, Request Access: 1). A red 'Update' button is visible in the top right corner.

## 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.

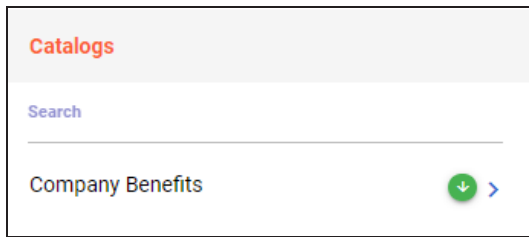
You can also download business assets in the XLSX format. To download business assets, follow these steps:

## Business Policies

---

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.

## Business Policies

GDPR Policies Update X

**Customer Phone Policy**

[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.

## Business Policies

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

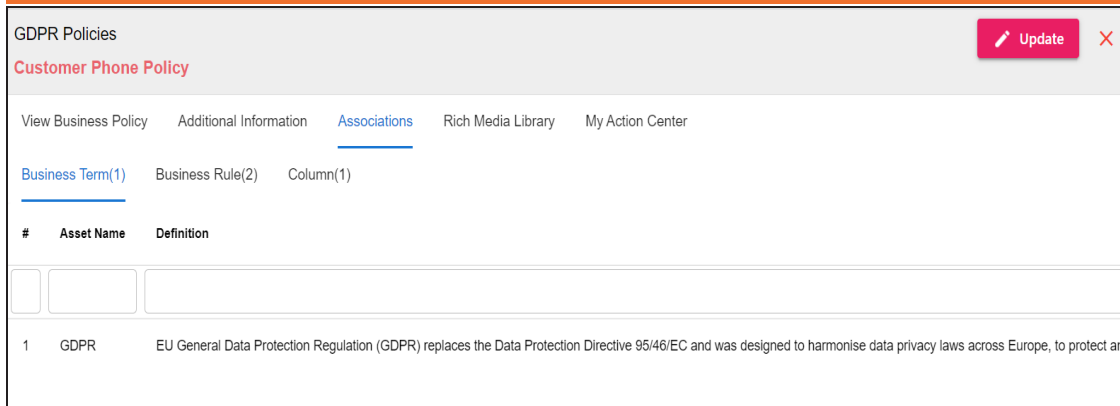
## Associations

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.

## Business Policies

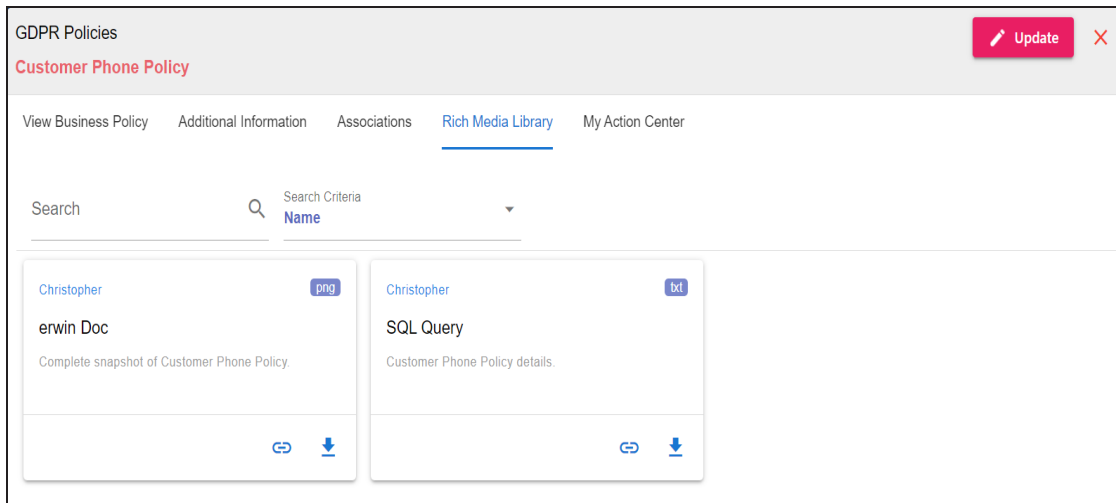


## Rich Media Library

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



## Business Policies

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](#).

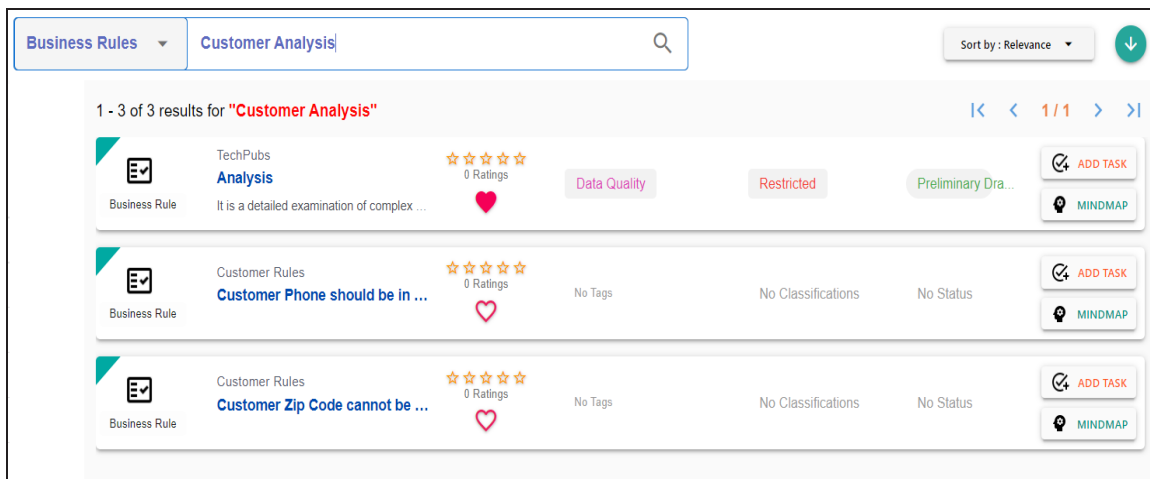
The screenshot displays the 'My Action Center' for a 'Customer Phone Policy' under 'GDPR Policies'. The interface includes a top navigation bar with 'View Business Policy', 'Additional Information', 'Associations', 'Rich Media Library', and 'My Action Center'. A search bar labeled 'Search Task' is present, along with a 'DEFAULT SORT' dropdown and a 'Download' icon. Below the search bar, there are filters for 'ALL TASKS (5)', 'CREATED BY ME (3)', and 'ASSIGNED TO ME (2)'. The main area shows three task cards: 'POLICY\_Customer Phone Policy\_', 'Access to Catalog', and 'Associate Technical Assets'. Each card includes a status indicator (e.g., 'To-do Task', 'Request Access'), counts for 'ASSETS', 'USERS', and 'DOCS', and a 'Created By' field. A left sidebar provides filters by 'Option' (Important: 3, Pending: 4, Completed: 1) and 'Types' (To-do Task: 3, Request Access: 2, Issue: 0). An 'Update' button is located in the top right corner.

## 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.

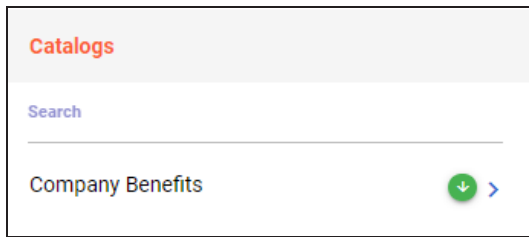
You can also download business assets in the XLSX format. To download business assets, follow these steps:

## Business Rules

---

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.

## Business Rules

The screenshot displays the 'TechPubs' interface for a business rule named 'Analysis'. The page has a top navigation bar with 'TechPubs' on the left and an 'Update' button on the right. Below the navigation bar, there are three tabs: 'View Business Rule' (selected), 'Associations', and 'Rich Media Library'. The main content area is divided into three sections:

- Rule Details:** Contains the business rule name 'Analysis', a definition stating 'It is a detailed examination of complex churn rate in order to understand churn nature or to determine churn's essential features.', and a description stating '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.'
- Governance Responsibilities:** Lists 'Data Stewards' as 'Mike Mannigan' and 'Technical Data Steward' as 'Joey Adams', each with a dropdown arrow.
- Classification:** Shows the rule is classified as 'Restricted' with a dropdown arrow.

## 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

#	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.

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

## Business Rules

---

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

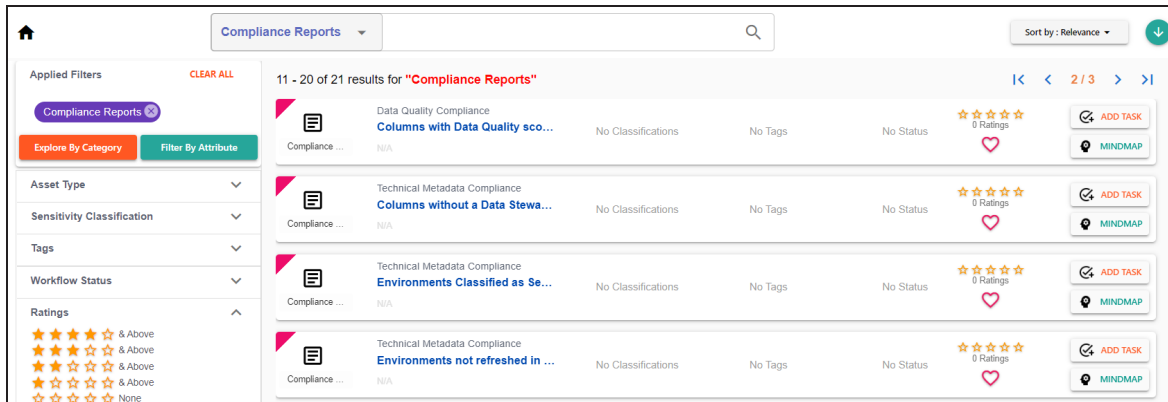
You can view and browse through the compliance reports available in your ecosystem using the Discover Assets module. Once the reports are generated, you can also download the compliance reports in .XLSX format.



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.

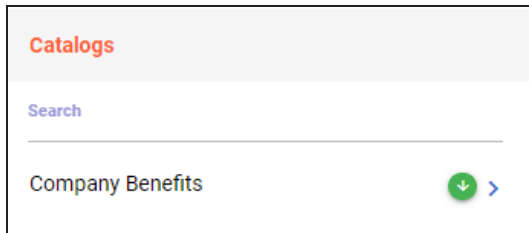
## Compliance Reports

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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.




## Compliance Reports

The screenshot displays the 'Business Assets Compliance' interface. At the top, there is a header with the title 'Business Assets Compliance' and a sub-header 'Business Policies not having governance responsibilities assigned'. A red 'Update' button is visible in the top right corner. Below the header, there is a navigation bar with tabs for '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.shampath@quest.com), and 'Frequency' (Daily). The right column contains several 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).

## 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

Business Assets Compliance

**Business Policies not having governance responsibilities assigned**

[View Compliance Reports](#) [Associations](#) [Documents](#) [My Action Center](#)

Search  Search Criteria **Name** ▼

No Owner xlsx

**Business Policies**

No Description available

[Download](#)

# Reviewing and Rating Assets

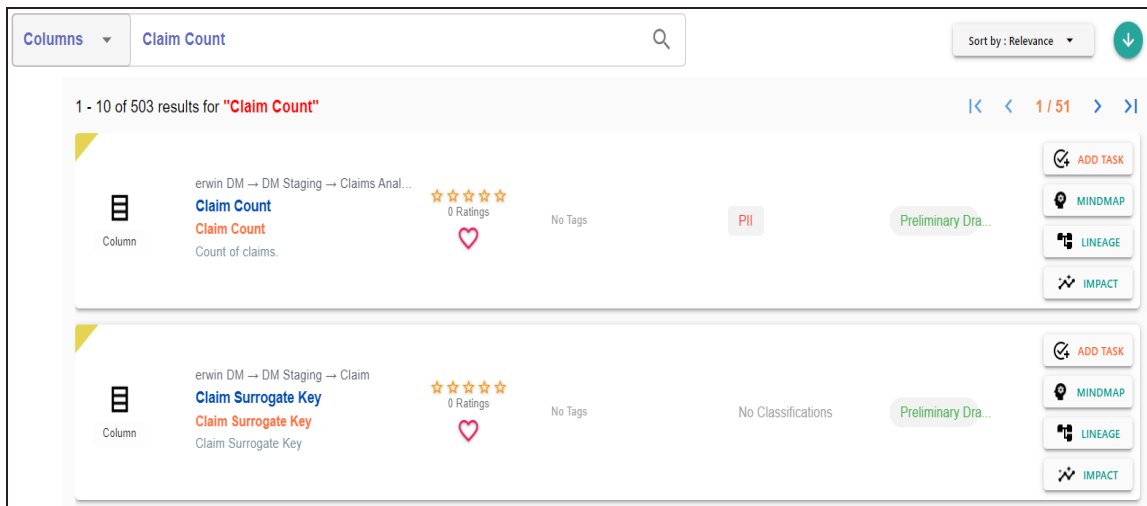
Using the Discover Assets module, you can rate and review data assets. Ratings enable you to maintain data asset quality of an asset and you can support ratings with descriptive reviews.

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.

## Reviewing and Rating Assets

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.

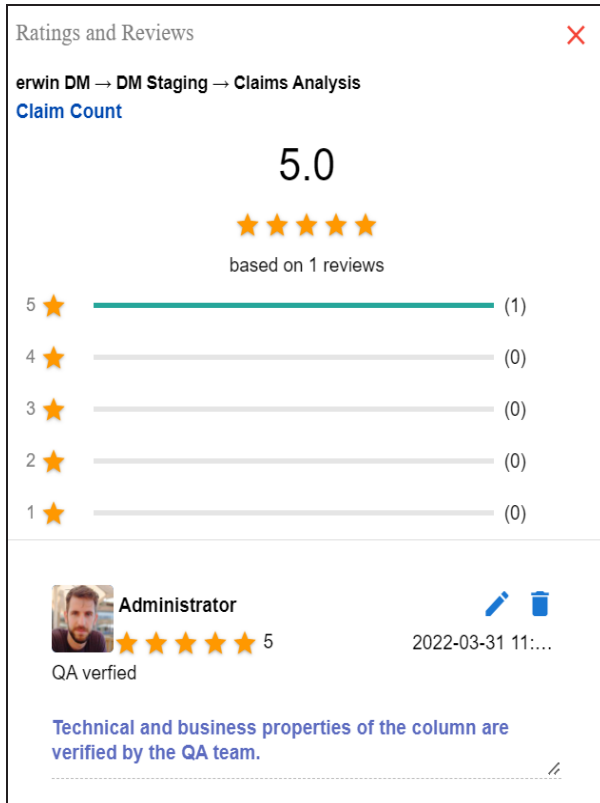
Field Name	Description
Rating	Specifies the rating of the asset on a scale of one to five stars

## Reviewing and Rating Assets

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.



The screenshot shows a 'Ratings and Reviews' window for an asset named 'erwin DM → DM Staging → Claims Analysis'. The overall rating is 5.0, based on 1 review, represented by five yellow stars. Below this, a horizontal bar chart shows the distribution of ratings: 5 stars (1 review), 4 stars (0 reviews), 3 stars (0 reviews), 2 stars (0 reviews), and 1 star (0 reviews). A review by 'Administrator' is shown with a 5-star rating, dated '2022-03-31 11:...', and marked as 'QA verified'. The review text states: 'Technical and business properties of the column are verified by the QA team.' There are edit and delete icons next to the review.

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

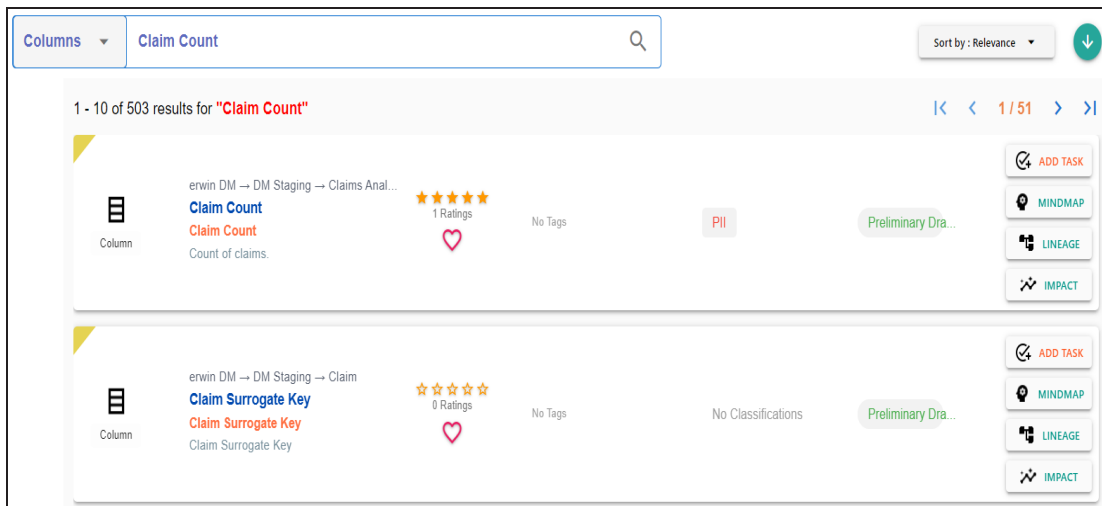
To improve productivity and collaboration, you can create tasks related to technical and business assets. These tasks may be to-do tasks, access requests, or issues. You can manage the task types via Action Center Settings.

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.

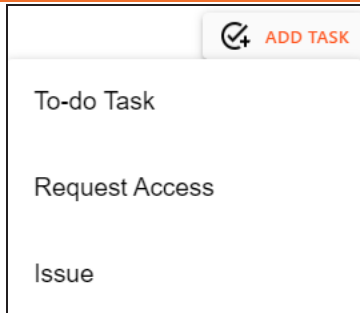


2. Click **Add Task**.

A list of task types appears.

## Adding Tasks

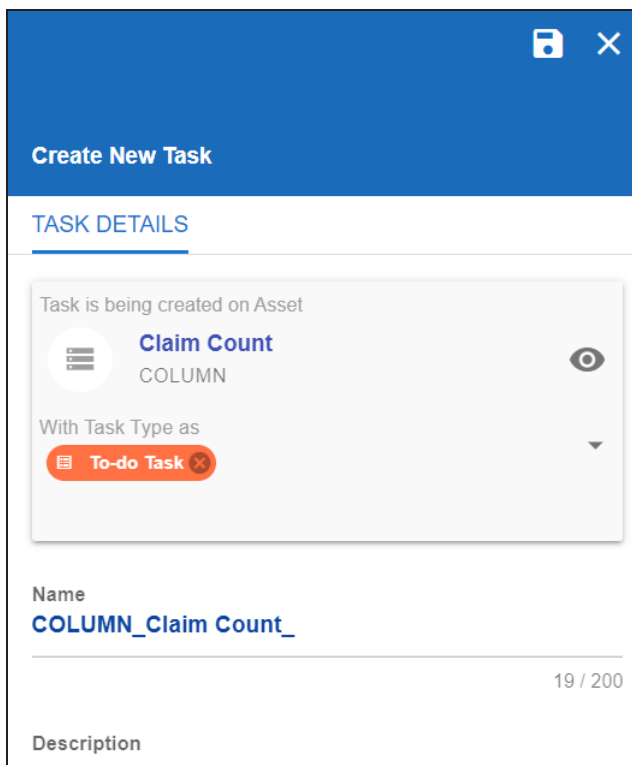
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A dropdown menu titled "ADD TASK" with a checkmark icon. The menu contains three options: "To-do Task", "Request Access", and "Issue".

3. Click the required task type.

The Create New Task page appears.




The "Create New Task" page features a blue header with a save icon and a close button. Below the header, the "TASK DETAILS" section shows a preview of the task being created on an asset. The asset is named "Claim Count" and is of type "COLUMN". The task type is set to "To-do Task". Below the preview, there is a "Name" field containing "COLUMN\_Claim Count\_" with a character count of "19 / 200". A "Description" field is also visible at the bottom.


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.

## Adding Tasks

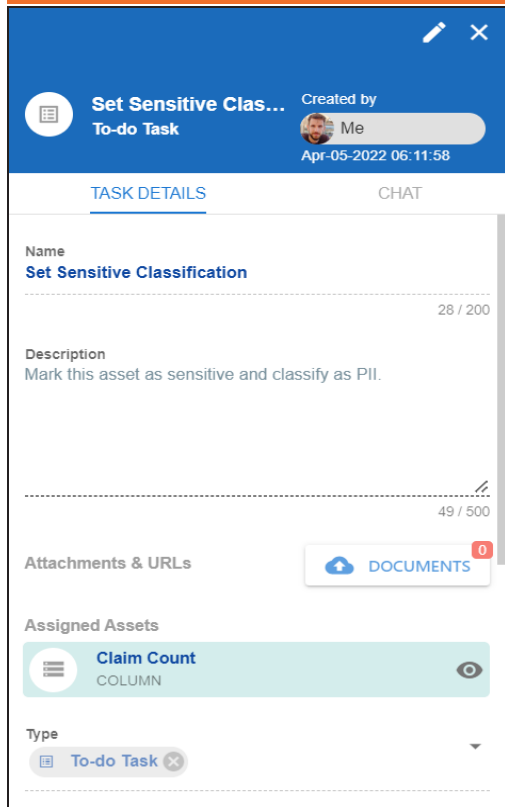
Field Name	Description
	For example, Column.
With Task Type as	Specifies the task type. For example, To-do Task.
Name	Specifies the name of the task. By default, it auto-populates with a name in the following format: <Asset_Type>_<Asset_Name>. You can edit it and rename the task. For example, Set Sensitive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



## Adding Tasks



## 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.

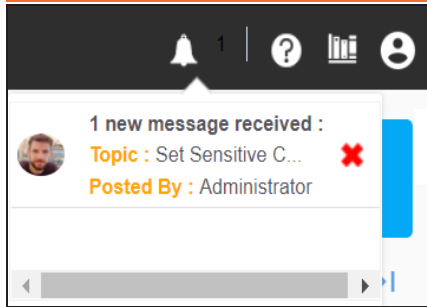
### External Users

Use this option to send messages to external users.

Users are notified via Messaging Center.

## Adding Tasks

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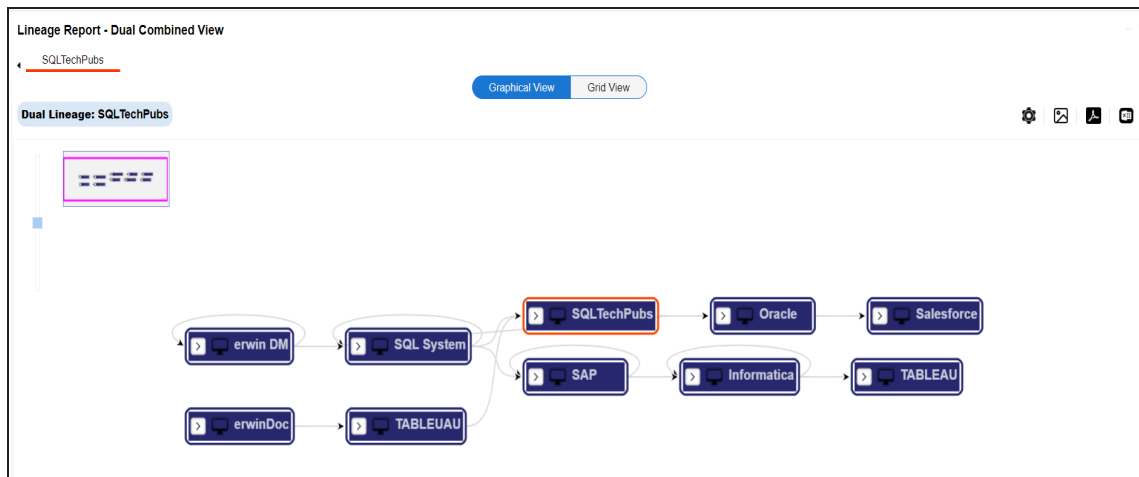
# Viewing Lineage

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](#)

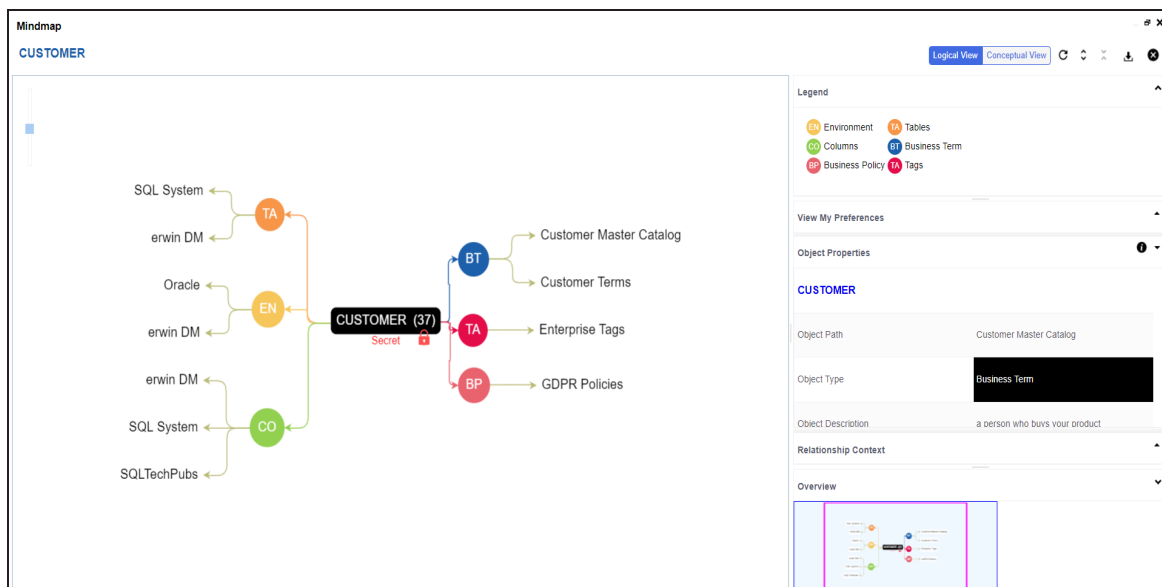
# Viewing Mind Maps

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 the 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.

The screenshot shows the 'Asset Impact' page for the asset 'Employees'. The page header includes filters for Asset Type (TABLE), Environment (DM Landing), and System (erwin DM). It also displays Classification (0%), DQ Score (0%), and Impact Score (0%). The main content area is divided into several sections:

- Impacts:** Four cards showing upstream and downstream dependencies for Systems (4), Environments (5), Tables (7), and Columns (11).
- Has:** A section showing 0 other impacts from Transformation Rules, Extract SQL, and Lookups.
- Linked To:** A section showing 0 Business Assets.

Buttons for 'UPSTREAM' and 'DOWNSTREAM' are provided for each category to view detailed dependencies. A 'LINEAGE' and 'EXPORT' button are also visible in the top right corner.

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

Asset  
**Employees**

Asset Type  
**TABLE**

Environment  
**DM Landing**

System  
**erwin DM**

Classification

0%

▲ 0%

DQ Score    Impact Score

**LINEAGE**

**EXPORT**

⚙️

Impacts  
**4**

Systems

← UPSTREAM 0

→ DOWNSTREAM 4

Impacts  
**5**

Environments

← UPSTREAM 0

→ DOWNSTREAM 5

Impacts  
**7**

Tables

← UPSTREAM 0

→ DOWNSTREAM 7

Impacts  
**11**

Columns

← UPSTREAM 0

→ DOWNSTREAM 11

Has **0**

Other Impacts

TRANSFORMATION RULES 0

EXTRACT SQL 0

LOOKUPS 0

Linked To **0**

Business Assets

Upstream (0)    Downstream (5)

#	System Name	Environment Name	Project	Subject Area	Mapping
1	erwin DI Suite	erwin_Sales	DigitalAdoption		<a href="#">map_1</a>
2	erwin DM	DM Landing	TestMap		<a href="#">tes</a>
3	SAP	SAP	TestMap		<a href="#">CUSTOMER_MAP</a>
4	SQL System	Customer Order Entry	TestMap		<a href="#">CUSTOMER_MAP</a>
5	SQL System	SQL Env	TestMap		<a href="#">CUSTOMER_MAP</a>

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

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