erwin Data Intelligence

Business Glossary Management Guide

Release v13.0

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Contents

Managing Business Glossary

This section walks you through business glossary management.

Business Glossary is managed via Business Glossary Manager. It involves creating, managing, and collaborating on common business vocabulary across the organization. Business Glossary Manager supports regulatory compliance, data governance, and data stewardship. It facilitates lineage maps by showing how semantic definitions are related to physical data dictionaries, data mappings, and data lineages.

For further information on accessing and using the Business Glossary Manager, refer to the Using Business Glossary Manager topic.

Using Business Glossary Manager

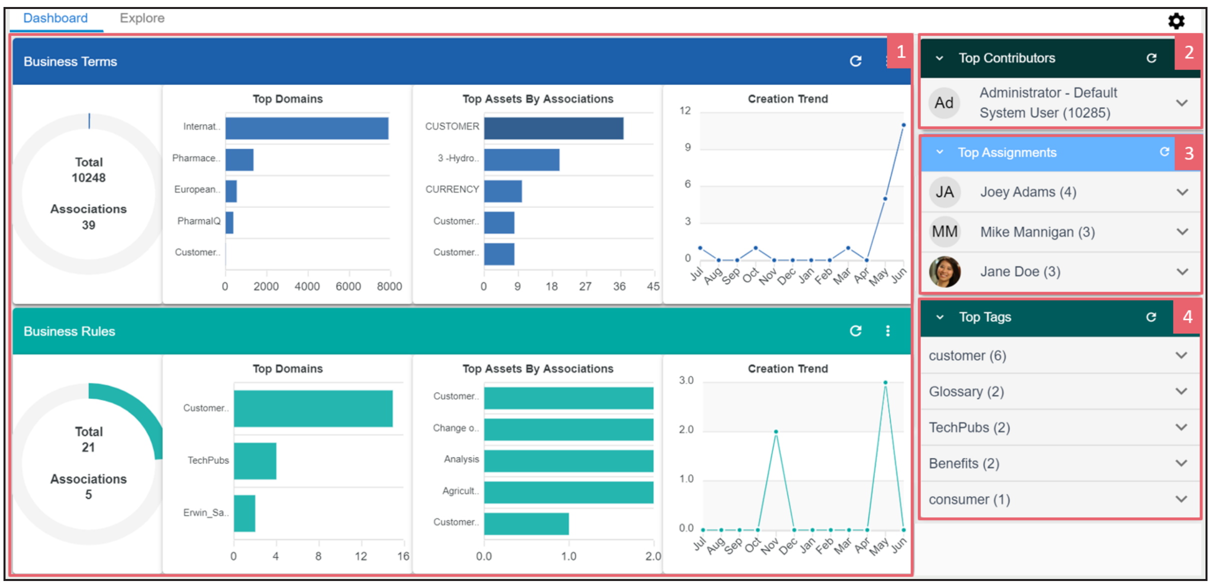
To access the Business Glossary Manager, go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.

Based on your configuration, either the Dashboard or the Explore tab opens. To configure the landing tab, click ⚙ on the top-right corner to set either of the following tabs as default:

- Dashboard
- Explore

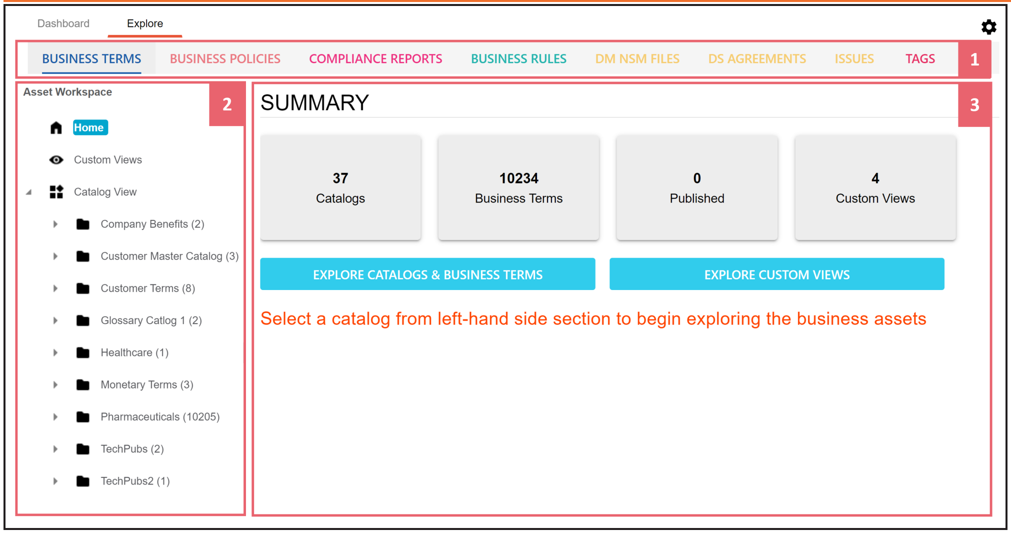
Dashboard

The Dashboard tab provides insights about business assets in your organization. For more information, refer to the Viewing Business Glossary Manager Dashboard topic.



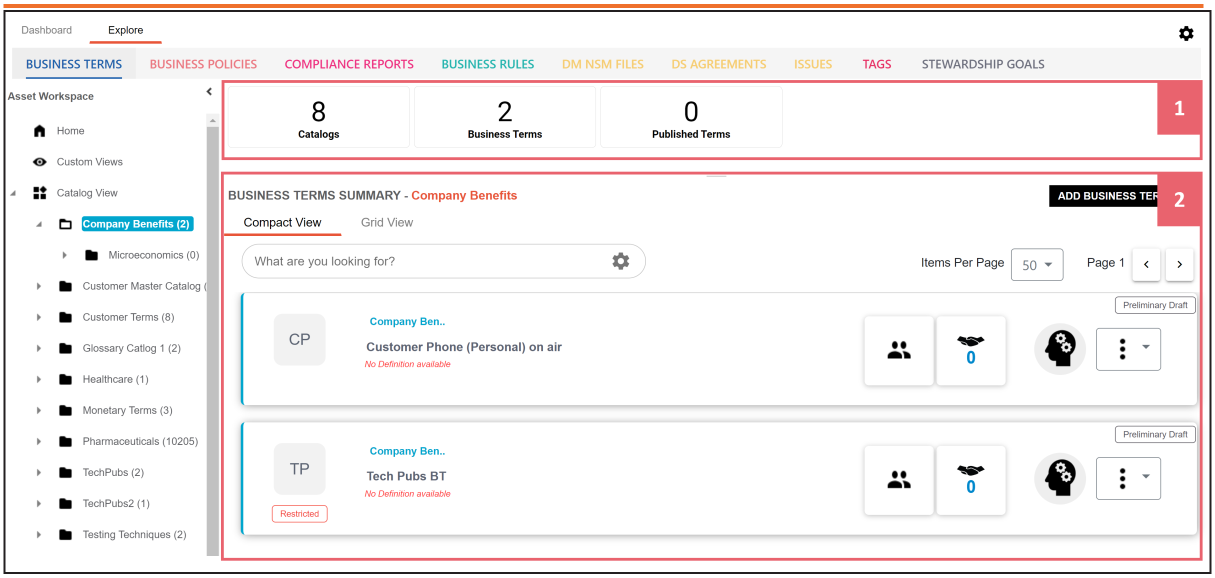
Explore

The Explore tab is the primary work area where you can create and manage business assets, and view their mind maps and associations.



UI Section	Function
1-Asset Browser	Use this pane to select a business asset type. The asset types available here depend on your Business Glossary Manager settings. You can also create custom asset types. For more information on creating asset types, refer to the Configuring Asset Types topic.
2-Asset Workspace	Use this pane to browse through your assets for the selected business asset type. It displays the available catalogs. In this pane you can view the following: ▪ **Home**: Displays a summary of objects under the selected business asset type. ▪ **Custom Views**: Displays the available custom views. For more information on custom views, refer to the Creating Views topic. ▪ **Catalog View**: Displays the available catalogs. Expand catalogs to view existing business assets.
3-Summary	Displays a summary of objects under the selected business asset type.

Selecting a catalog from the Asset Workspace opens a list of business assets under the selected business asset type in that catalog.

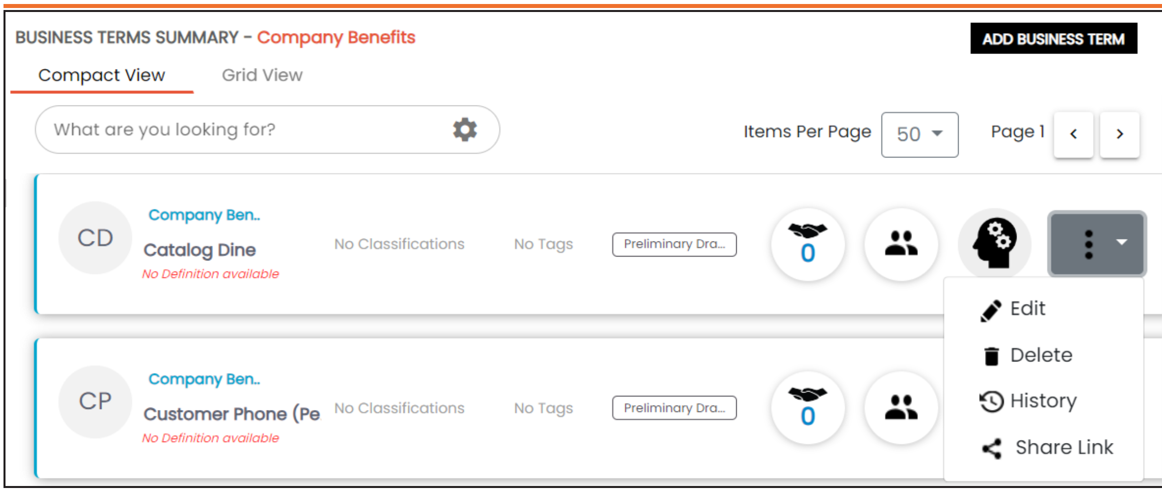


UI Section	Function
1-Asset Overview	Use this pane to view the summary of the objects under the selected business asset type. It displays the count of each component.
2-<Business Asset> Summary	Use this pane to view a list of business assets based on the selection in the Asset Workspace pane. You can open a business asset and work on it. You can use this pane in two views: ▪ Compact View: Displays a list of assets, their information, and available operations in a compact, card format. Alternatively, you can also use the Search box to search and filter business assets. ▪ Grid View: Displays a list of assets, their information, and available operations in a tabular format.

Compact View

The Compact View displays a list of business assets and their information, such as the asset name, description, status, tags, and sensitivity classification in a compact, card format. You can also search for an asset, view governance responsibilities, associations, and mind map of an asset using the card. Apart from this, each card also provides options to manage assets.

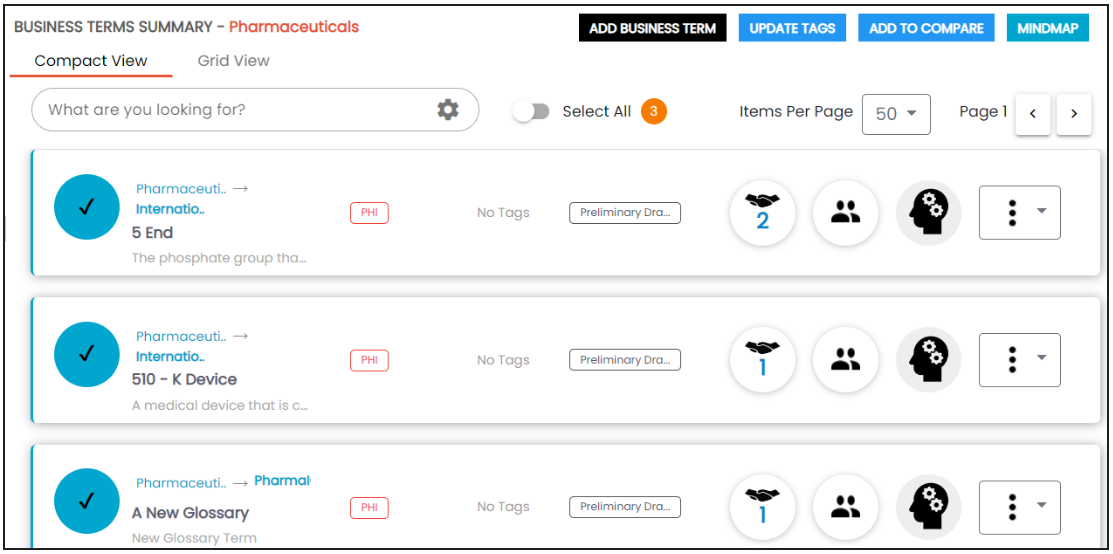
To narrow down the list of search for specific assets, use the Search box to search and filter.



The following table explains the options available for you to work on business assets:

Options	Description
	Use this option to configure search and filter options for the assets list. For more information about the search feature, refer to Search.
	Use this option to view a list of associations or set up new associations. Clicking this option opens the Associations tab.
	Use this option to view the data governance responsibilities assigned for an asset.
	Use this option to view the mind map for an asset. For more information about mind maps, refer to the Viewing Mind Maps topic.
	Use this option to manage the business asset: ▪ Use to edit a business asset and update term details, governance responsibilities, and so on. ▪ Use to delete a business asset that is no longer required. ▪ Use to view all the actions performed on a business term since it was created. ▪ Use to share a business asset using a shareable link.

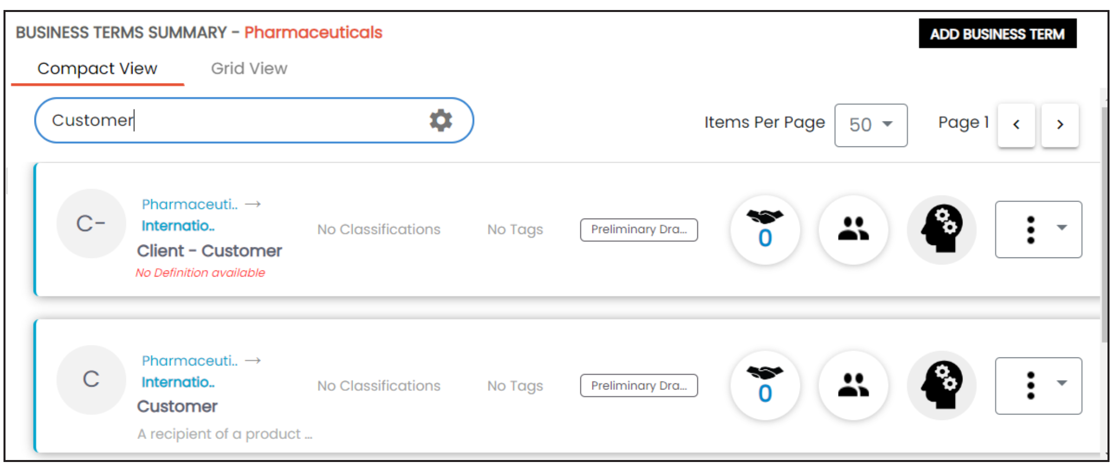
Apart from the options explained in the table above, you can also view mind maps, update tags, and compare business assets. To update multiple business assets, select the required assets, and click the relevant option. These option appears only when you select one or more assets.



Search

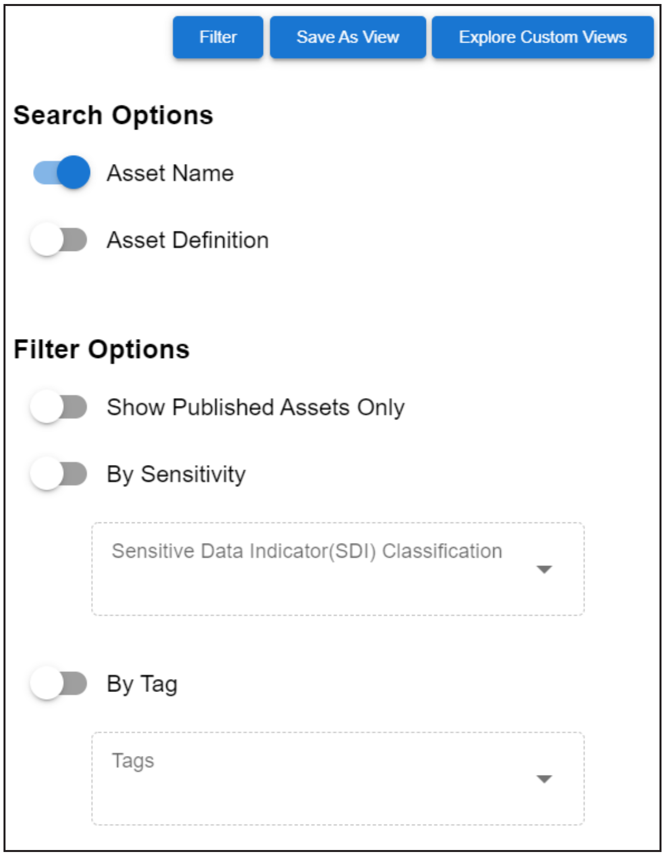
You can narrow down the list of business assets or search for a specific business asset using the search and filter options.

To search for business assets, enter a business asset name in the Search box. The <Business Asset> Summary pane displays assets based on your search term.



By default, the search uses a predefined configuration to filter and display search results. You can configure your own search settings using the search and filter options.

To configure the search and filter options, on the **Search** box, click ⚙. The search and filter options pane appears.



Refer to the following table for descriptions of Search and Filter Options.

Options	Description
Asset Name	Switch this option on to search business assets based on asset name. This option displays results when the search term matches a business asset name in your business glossary.
Asset Definition	Switch this option on to search business assets based on asset definition. This option displays results when the search term matches the content in the asset definition in your business glossary.
Show Published	Switch this option on to filter and display only published assets.

Assets Only	
By Sensitivity	Switch this option on to filter assets based on sensitivity. This enables the **Sensitive Data Indicator (SDI) Classification** list. Select a sensitivity classification based on which you want to filter results.
By Tag	Switch this option on to filter assets based on the enterprise tags applied to the business assets. This enables the **Tags** list. Select one or more tags based on which you want to filter results. You can create and assign new tags to business assets, For more information about creating tags, refer to the Creating Enterprise Tags topic.
By Governance Responsibilities	Switch this option on to filter assets based on governance responsibilities. This enables the available data governance roles lists. Select one or more relevant users in each list.

Once you have configured the search and filter options, you can use the following options:

Filter

Use this option to display search results based on your configuration.

Save As View

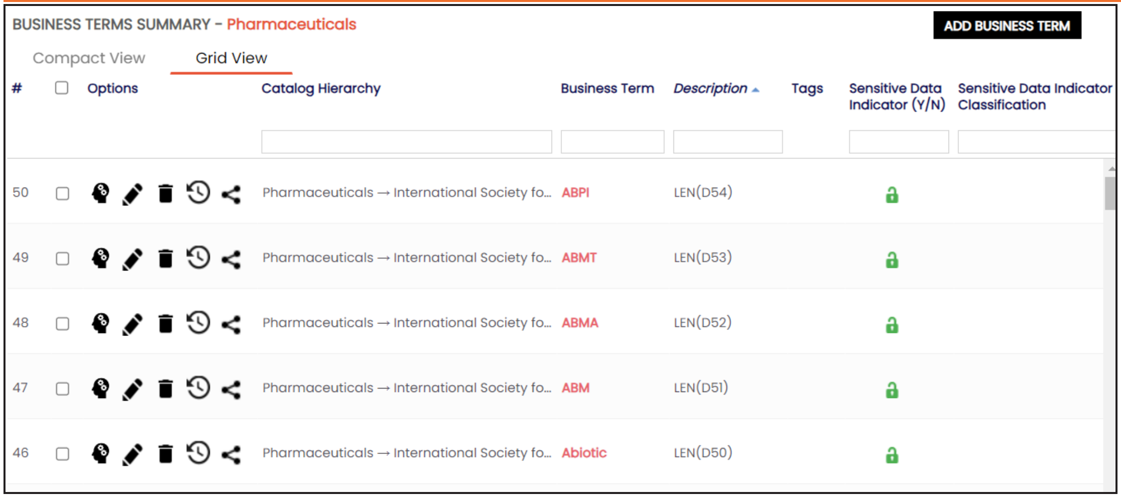
Use this option to save the search and filter configuration as a custom view.

Explore Custom Views

Use this option to view existing custom views.

Grid View

The grid view displays a list of assets and their information such as asset name, description, status, and sensitivity classification in a tabular format. You can also manage assets, generate mind maps, and share business assets on the Grid View.



In the Grid View, you can:

- View mind maps
- Edit or delete business assets
- View history
- Share links to business assets
- Move business assets
- Compare business assets

Managing a business glossary involves the following:

- Creating business terms
  - Managing business terms
- Creating business policies
  - Managing business policies
- Creating business rules
  - Managing business rules

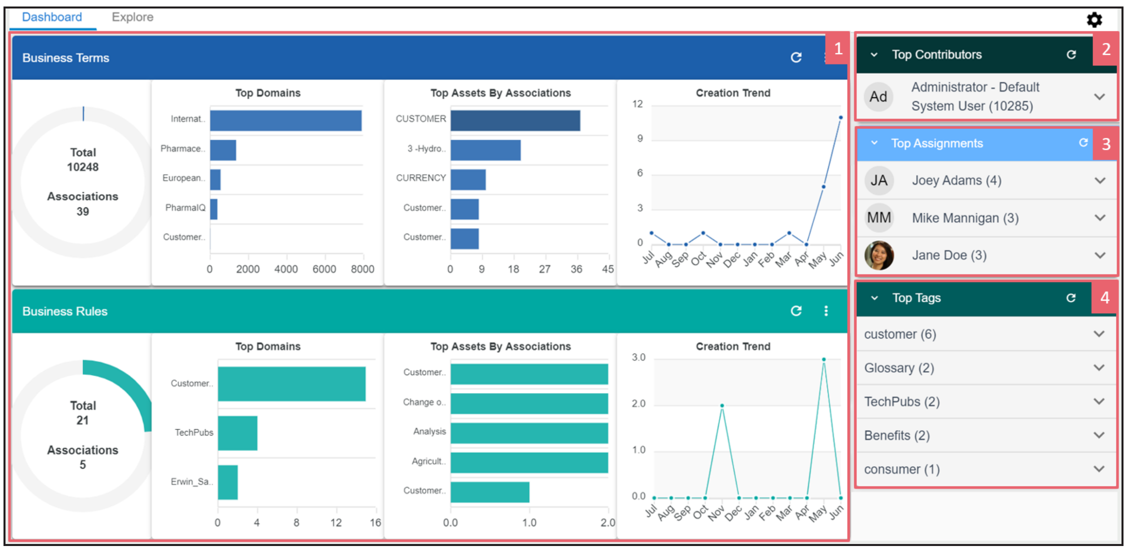
Once, you have created and set up these business glossary assets, you can assign data stewards and set up stewardship goals.

Viewing Business Glossary Manager Dashboard

The Business Glossary Manager Dashboard helps you to build insights about business vocabulary distribution across your organization. It helps you analyze the business assets based on creation trends, associations, and domains. You can also configure the dashboard to display insights of your favorite business asset.

To access the dashboard, go to **Application Menu** > **Data Catalog** > **Business Glossary Manager** > **Dashboard**.

The Business Glossary Manager Dashboard appears.

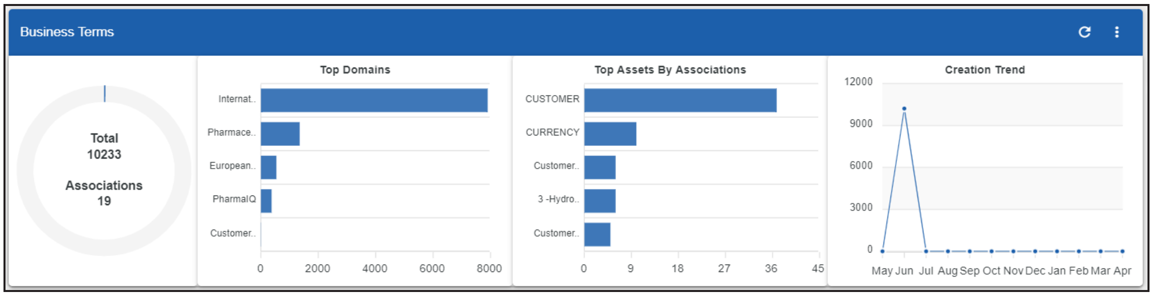


UI Section	Function
1-<Business Asset>	It displays insights about all business assets and their associations. You can also change the asset type on the cards.
2-Top Contributors	It displays top contributors in your organization based on business asset types.
3-Top Assignments	It displays a list of users with most responsibilities based on data governance responsibilities and business asset types.
4-Top Tags	It displays a list of most used tags.

<Business Asset>

Viewing Business Glossary Manager Dashboard

For each business asset type on your ecosystem, the <Business Asset> section displays the total number of assets and associations on asset type-specific cards.

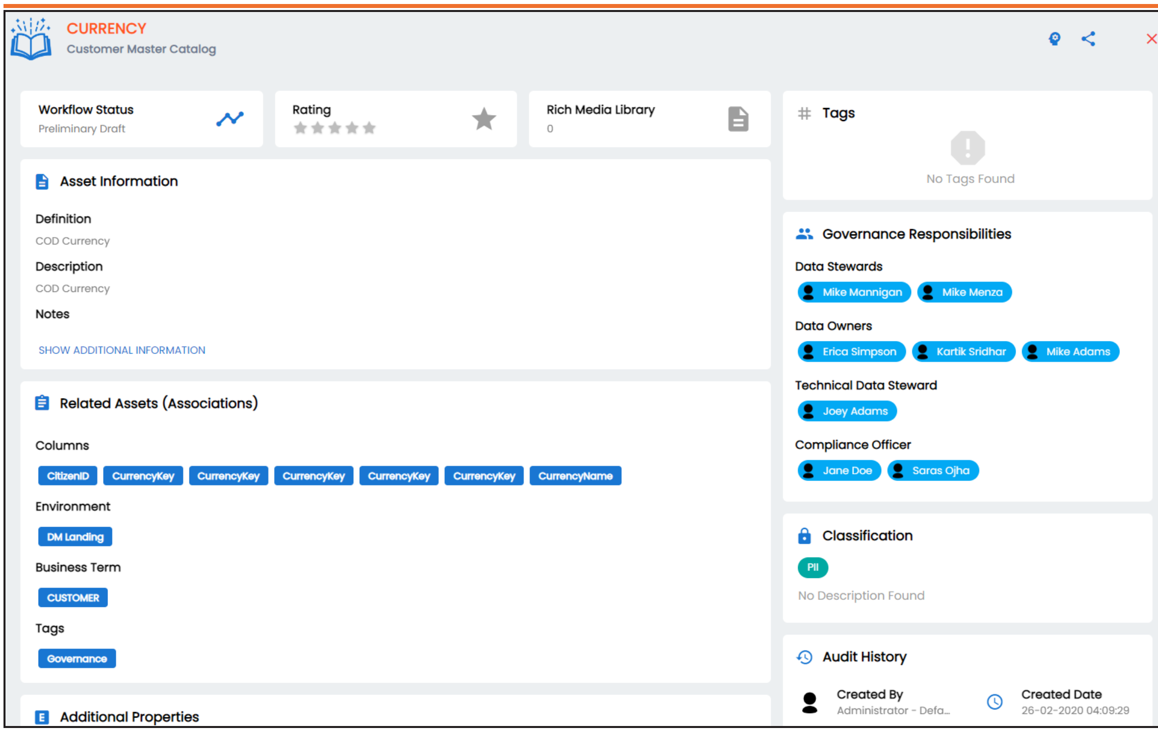


These cards also display the following information:

- **Top Domains**: By default, it displays the top five domains (catalogs) with most number of business assets.
- **Top Assets By Associations**: By default, it displays the top five assets with most number of associations.
- **Creation Trend**: It displays the month-wise trend of business asset creation.

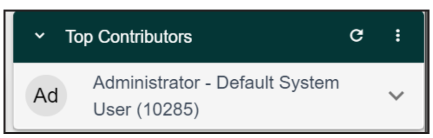
You can drill down to view detailed information of business assets.

To view detailed information of a business asset or its association, click the chart on the card.



Top Contributors

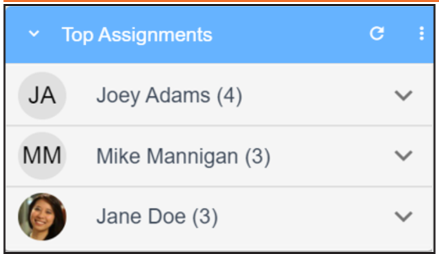
The Top Contributors card displays a list of top contributors in your organization based on the number of business assets assigned.



To view a contributor's list of assets based on the asset type, click ⌄.

Top Assignments

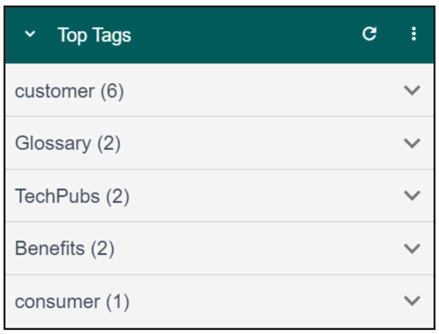
The Top Assignments card displays a list of users with the most assigned responsibilities based on data governance responsibilities for business asset type.



To view the top responsibilities list of assets based on the asset type, click .

Top Tags

The Top Tags card displays the most used tags based on business assets.



To view the list of top tags, click .

This displays the list of tags based on asset type.

You can also manage and customize the Business Glossary Manager Dashboard using the following options:

Refresh ()

Use this option to refresh the data on the cards.

More Options ()

Use this option to change the asset type and number of records displayed on the card. Click , and use the following options:

- **Change Asset**: Use this option to change the asset types on a card.
- **Records**: Use this option to set the number of records displayed on a card.

- **Background**: Use this option to change the card's background color. This option is not available for <Business Asset> cards.

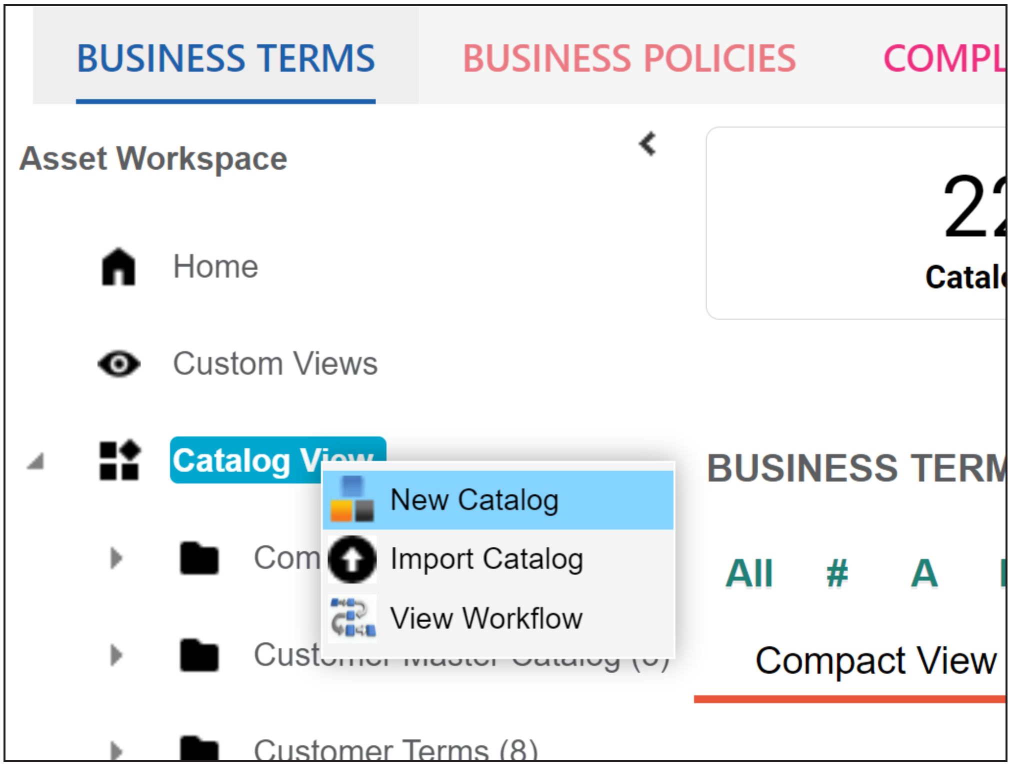
Creating Catalogs

Catalogs are the containers for all the asset types that are created in the Glossary Workspace. You can group business assets based on your organization's projects, departments, or functions. Therefore, before creating business assets, you need to create a catalog. You can also create sub-catalogs to group business assets further.

To create catalogs, follow these steps:

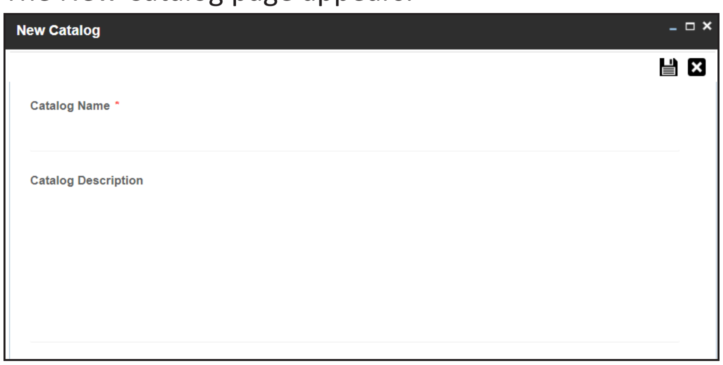
1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**.
2. On the Asset Browser, select a business asset.
   By default, Business Terms appear, and Asset Workspace pane displays catalogs.
   This example walks you through creating a catalog under Business Terms.

3. In the Asset Workspace pane, right-click the **Catalog View** node.



4. Click **New Catalog**.

   The New Catalog page appears.



5. Enter **Catalog Name** and **Catalog Description**.

   For example:

- **Catalog Name**: Business and Management
- **Catalog Description**: The catalog contains business terms of the organization.

6. Click .
   A catalog is created and added to the catalog tree.

Once a catalog is created, you can manage it using the options available on right-clicking the catalog. Managing catalogs involves:

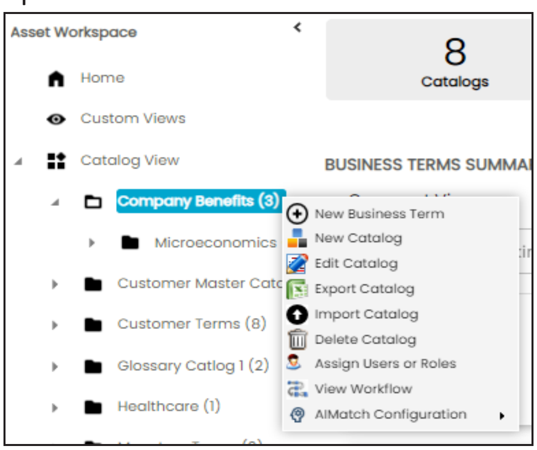
- Creating sub-catalogs
- Editing catalogs
- Importing or exporting catalogs
- Assigning users
- Viewing workflows

Managing Catalogs

Managing catalogs involves:

- Creating sub-catalogs
- Editing catalogs
- Importing or exporting catalogs
- Assigning users and roles
- Viewing workflows
- Configuring AIMatch

To manage catalogs, follow these steps:

1. Right-click a catalog.
   For example, right-clicking a business term catalog displays the corresponding options.
   

2. Use the following options:

   New Catalog

   Use this option to create sub-catalogs and group business assets further.

   Edit Catalog

   Use this option to update the catalog's name and description.

   Import Catalog

Use this option to import existing catalogs. On the Import Business Catalog page, select the catalog file and click .

Export Catalog

Use this option to export a catalog to an XLSX file. You can later import this file to your glossary workspace.

Delete Catalog

Use this option to delete a catalog that is no longer required. Deleting a catalog also deletes all business assets in the catalog.

Assign Users or Roles

Use this option to assign users and roles to the catalog based on your organization. For more information on assigning users and roles, refer to the Assigning Users and Roles topic.

View workflow

Use this option to view the workflow assigned to the catalog. The workflow displays all the stages, users, and roles involved. Also, it shows the flow of information and action across all the stages.

AIMatch Configuration

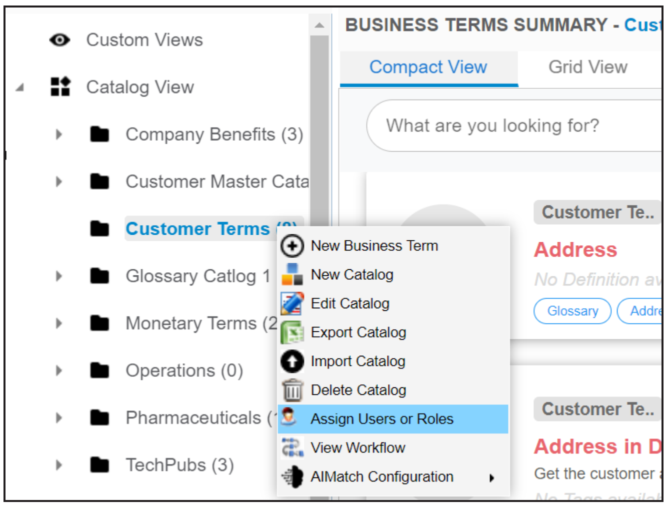
Use this option to schedule an AIMatch job to associate metadata to a business term and to detect sensitive data for associations. For more information, refer to the Associating Metadata for AI Matching topic.

Assigning Users and Roles

You can assign users and roles to a catalog. These assignments facilitates governance responsibilities assignment to the business assets in the catalog.

Assigning Roles

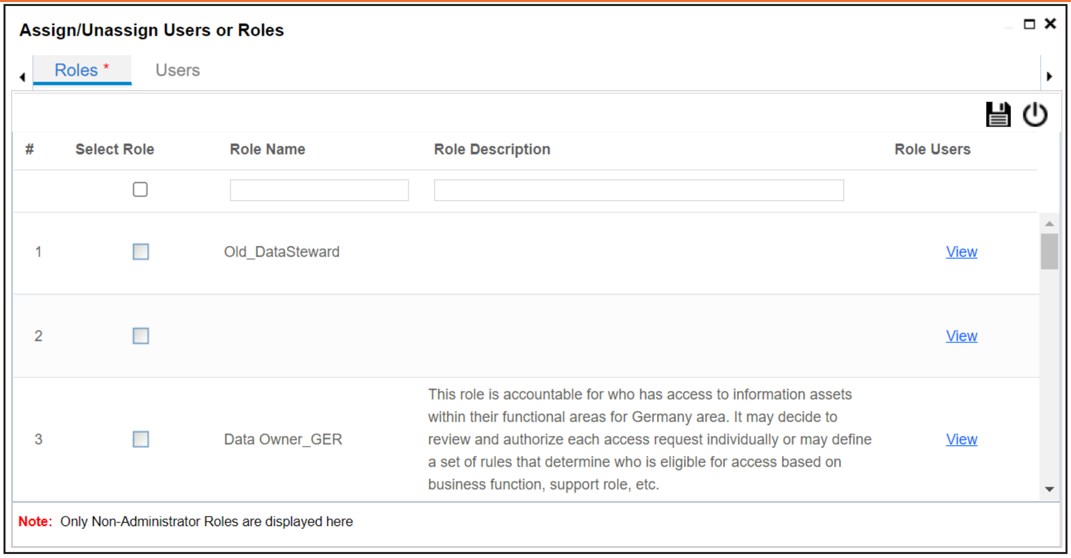
To assign roles, follow these steps:

1. Right-click a catalog.
   For example, right-clicking a business term catalog displays the corresponding options.
   

2. Click **Assign Users or Roles**.

   The **Assign/Unassign Users or Roles** page appears. By default, the Roles tab appears.

   You can click View to view the users assigned to a role.

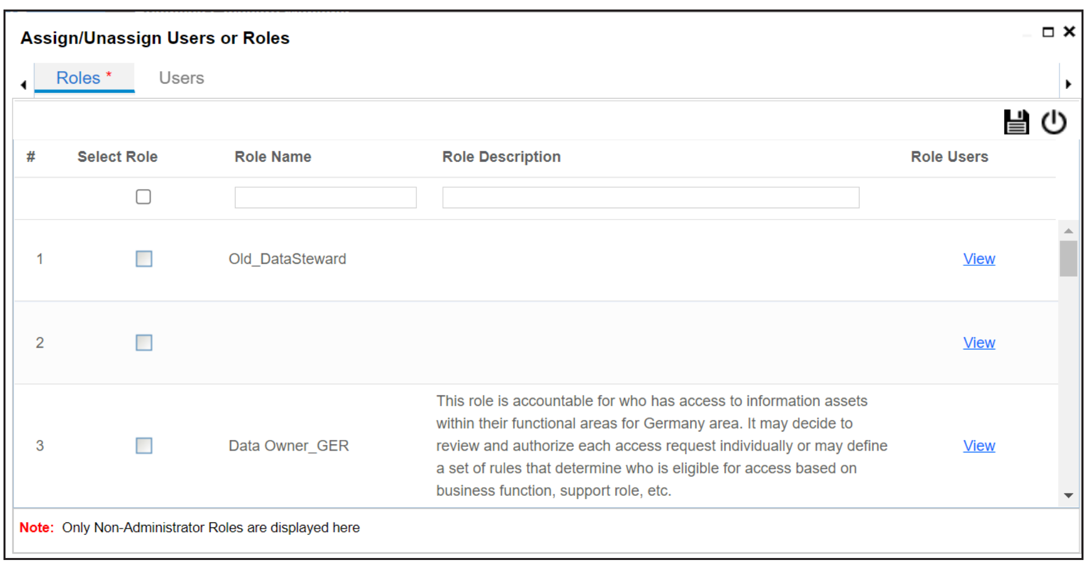


3. Select the required roles.
4. Click .

   The selected roles are assigned to the catalog.

Assigning Users

To assign users, on the **Assign/Unassign Users or Roles** page, click the **Users** tab.



Select the required users and click .

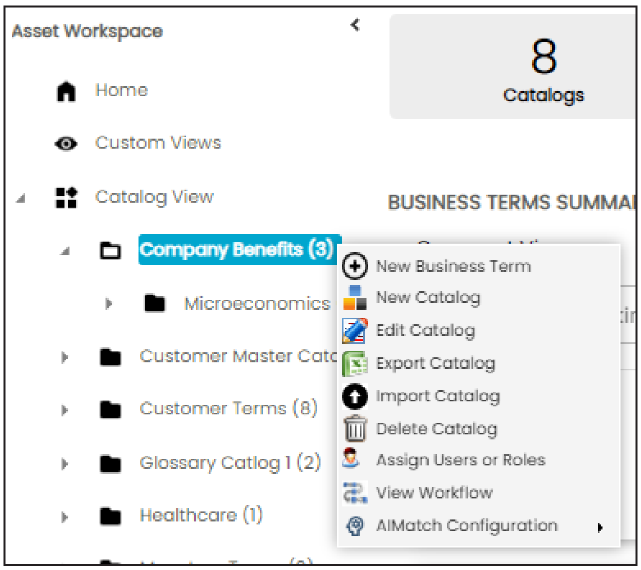
The users are assigned to the catalog.

Creating Business Terms

Business terms are globally defined terms that represent your business terminology usage. Using business terms, you can maintain a common business vocabulary across your organization. You can create business terms in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

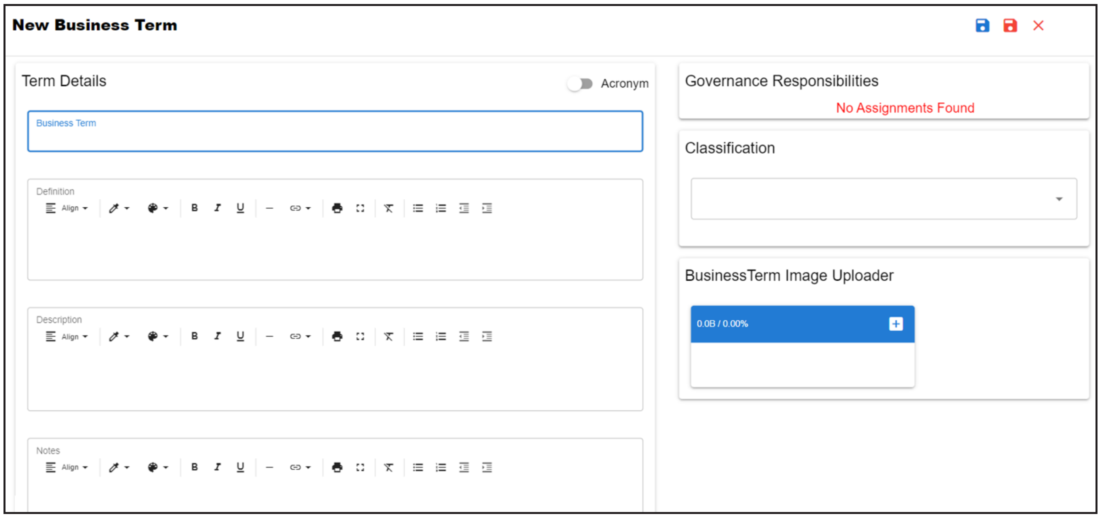
To create business terms, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**.
2. Go to the **Business Terms** tab.
   The Workspace switches to the business terms view.
3. In the **Asset Workspace** pane, right-click a catalog.



4. Click **New Business Term**.

   The New Business Term page appears.



5. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

   Refer to the following table for field descriptions.

Field Name	Description
Acronym	Specifies whether the business term is an acronym.
Business Term	Specifies the name of the business term. For example, Account.
Definition	Specifies the definition of the business term. For example: An Account contains data for a party.
Description	Specifies the description of the business term. For example: Account contains data for posting, payments, debt recovery, and taxes.
Notes	Specifies the reference notes, if any. For example: The data for posting, payments, debt recovery, and taxes was imported from the Account.xlsx file.
Governance	Specifies the users assigned with data governance responsibilities for

Field Name	Description
Responsibilities	the business assets. For more information, refer to Updating Data Governance.
Classification	Specifies the sensitive data indicator (SDI) classification of the business term. Also, you can add multiple SDI classifications to a business term. For example, PHI. For more information on configuring SDI classifications, refer to the Configuring Sensitive Data Indicator Classifications topic. By default, this field is enabled for business terms. For more information on enabling sensitivity fields, refer to the Configuring Asset Details topic.
Business Term Image Uploader	Drag and drop a picture of business term or click to browse and upload a picture.

6. Click .
   A business term is created and added to the catalog.
   Based on your workflow assignment settings, the business term may need further action for review or approval. For more information, refer to the Managing Business Glossary Workflows topic.

Once you create a business term, you can click a business term in the Business Term Summary pane to view it. You can enrich it further by:

- Setting up associations
- Setting up additional details
- Adding rich media
- Adding tasks
- Viewing workflow logs

- Assigning valid values
- Comparing business terms

You can manage a business term using the options available under the Options column on the Grid View tab. Managing business terms involves:

- Viewing mind maps
- Viewing history
- Editing or deleting business terms
- Sharing links of business terms

Managing Business Terms

Managing business terms involves:

- Viewing mind maps
- Editing or deleting business terms
- Viewing history
- Sharing links to business terms

To manage business terms, follow these steps:

1. On the **Compact View** tab, click ⋮.
   Alternatively, on the **Grid View** tab, use the **Options** column for a business term.
2. Use the following options to manage business terms:

   View Mind Map ( )

   Use this option to view a business term's mind map. A mind map displays the pictorial representation of the business term, its associations, relationships, sensitivity, and more in a logical and conceptual view.
   For more information on mind maps, refer to the Viewing Mind Maps topic.

   Edit Business Term ( )

   Use this option to edit a business term by updating term details, governance responsibilities, and so on.
   For more information on editing business terms, refer to the Viewing or Editing Business Terms topic.

   Delete Business Term ( )

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

   View History ( )

   Use this option to view all the actions performed on a business term since it was created. Alternatively, on the Edit Business Term page, click the **History** tab.

   Share Link( )

Use this option to share a link to a business term. The following options are available to share the link:

Copy Link: Use this option to copy the shortcut link to the business term. You can then share this link manually.

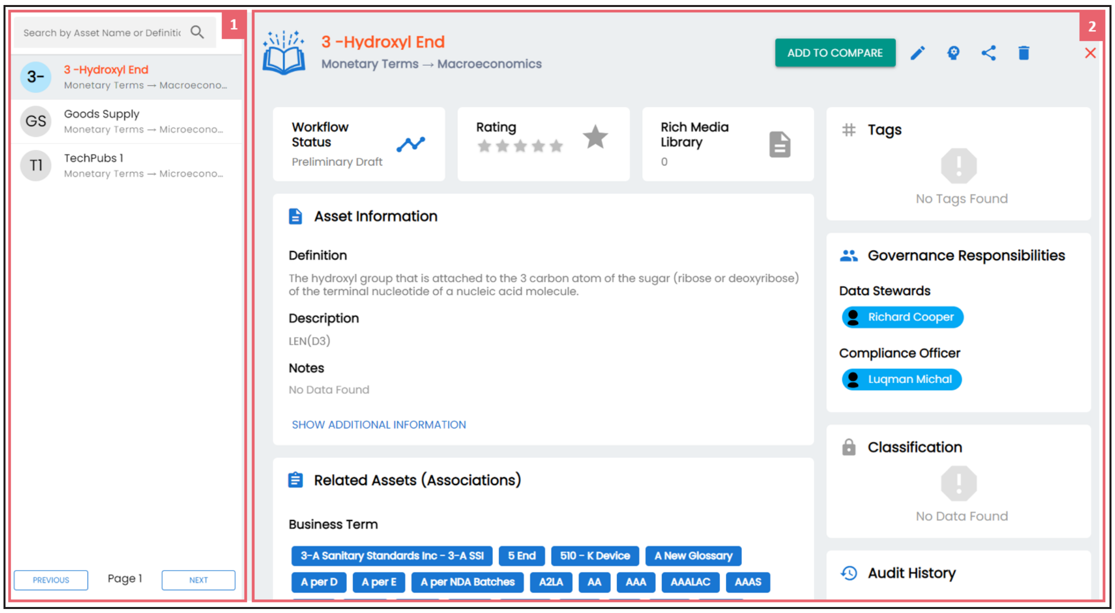
Email: Use this option to share the shortcut link to the business term via an email.

Viewing or Editing Business Terms

You can view business term details and its properties on the View Business Term tab. On the **Business Terms Summary** page, click a business term.

Apart from viewing and editing business terms, you can also compare them while viewing the asset.

The business term summary page appears.



UI Section	Function
1-Business Term List	Use this pane to browse through the list of business terms.
2-Term Details	Use this section to view business term details. Apart from viewing business term, you can view or edit the following business term properties: ▪ Asset Information ▪ Workflow Status ▪ Governance Responsibilities ▪ Classification ▪ Miscellaneous

	▪ Business Term Image

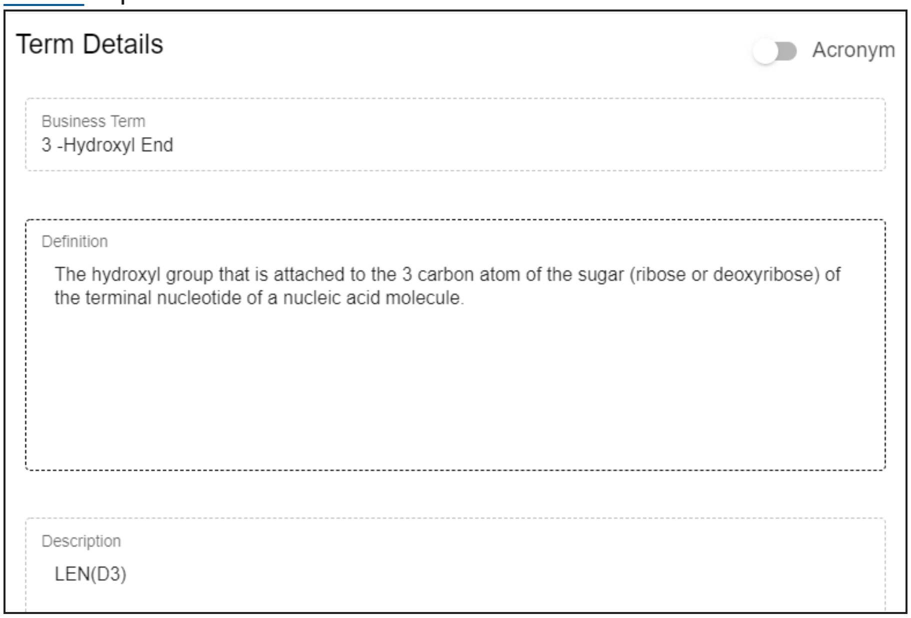
Editing Business Terms

To edit a business term, follow these steps:

1. On the business term summary page, click .
2. On the Edit Business Term tab, use the following options:

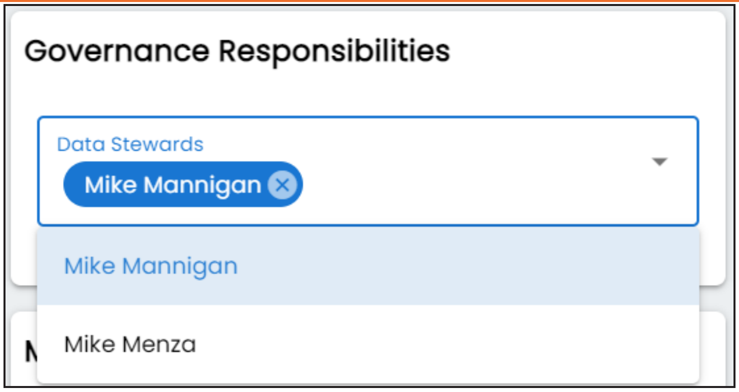
Term Details

Use this section to edit business term's details, such as its definition and description. For description of fields on this section, refer to the Creating Business Terms topic.



Governance Responsibilities

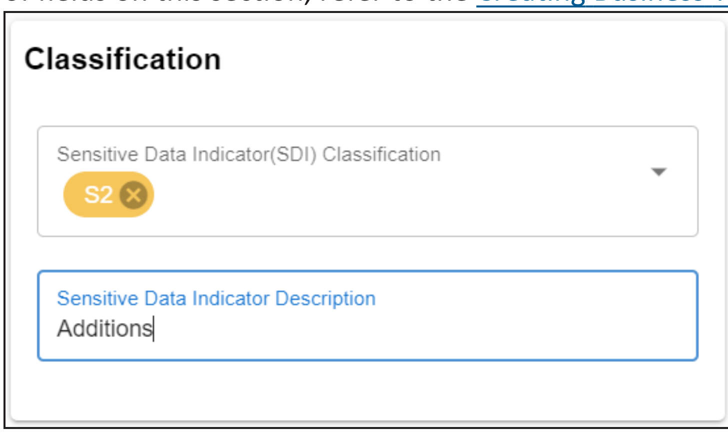
Use this section to edit governance responsibilities assignment. It displays roles groups based on the roles and users assigned to a business term catalog. To edit governance responsibilities, click a role group and add or remove users. For example, in the following image Mike Mannigan is added to the Data Stewards role group.



For more information on assigning roles and users to a catalog, refer to the Updating Data Governance Assignments topic.

Classification

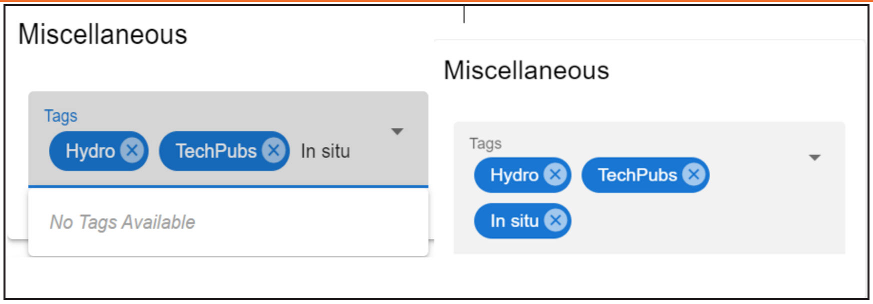
Use this section to edit the SDI classification of a business term. For description of fields on this section, refer to the Creating Business Terms topic.



Miscellaneous

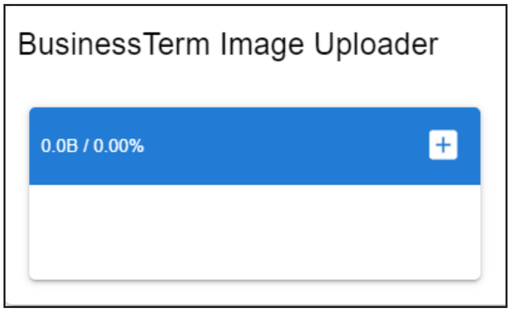
Use this section to associate enterprise tags with business terms. Click **Tags** and select an existing tag or enter a tag name to create one on the fly.

For example, in the following image, a tag, "In situ", is created and assigned to a business term.



Business Term Image Uploader

Use this option to upload an image corresponding to a business term.

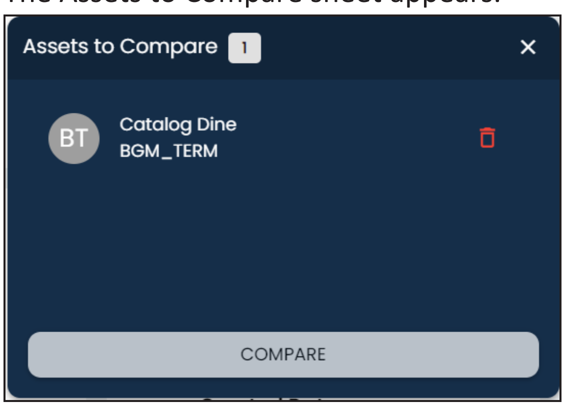


To upload an image, click + and, then browse and select the image.

Comparing Business Terms

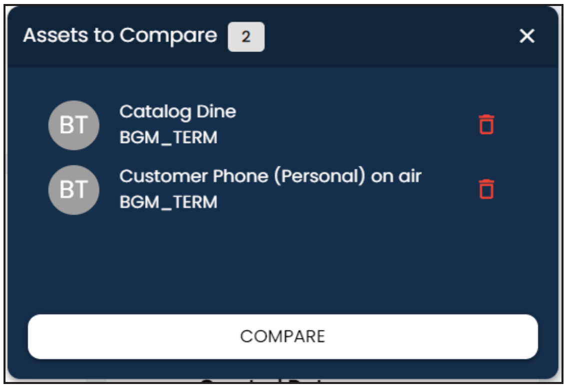
To compare business terms while viewing them, follow these steps:

1. On the Assets Details page, click **Add to Compare**.
   The Assets to Compare sheet appears.



2. On the Business Term List, select other assets that you want to compare, and click **Add to Compare**.

   The selected asset is added to the Assets to Compare sheet.



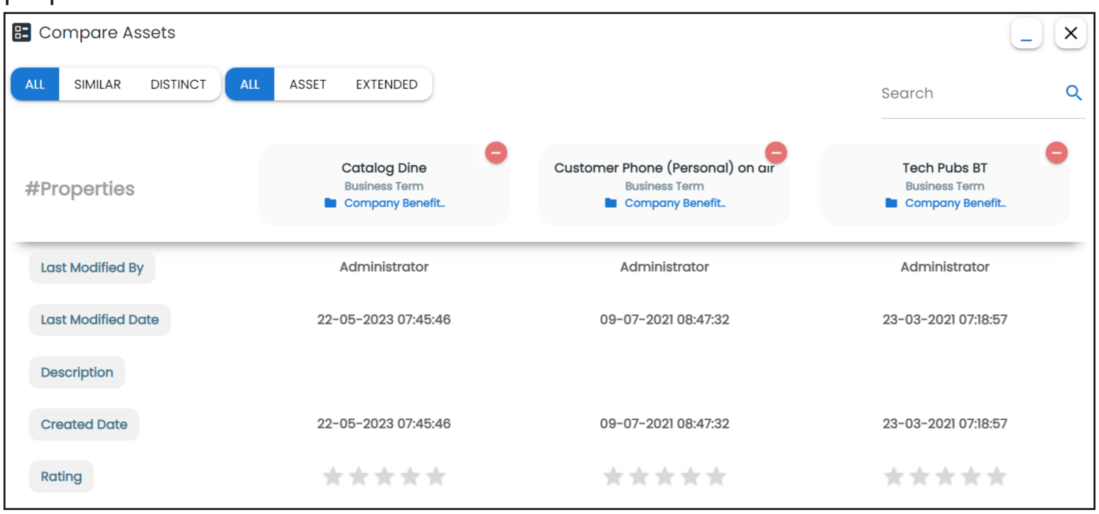
   You can click 🗑 to remove assets from the list.

   Repeat this step to add more assets for comparison.

> You can select up to five assets for comparison.

3. Click **Compare**.

   The Compare Assets page appears and displays the side by side comparison of asset properties for the selected assets.



For more information about comparing assets based on properties, refer to the Comparing Business Assets topic.

Setting Up Associations for Business Terms

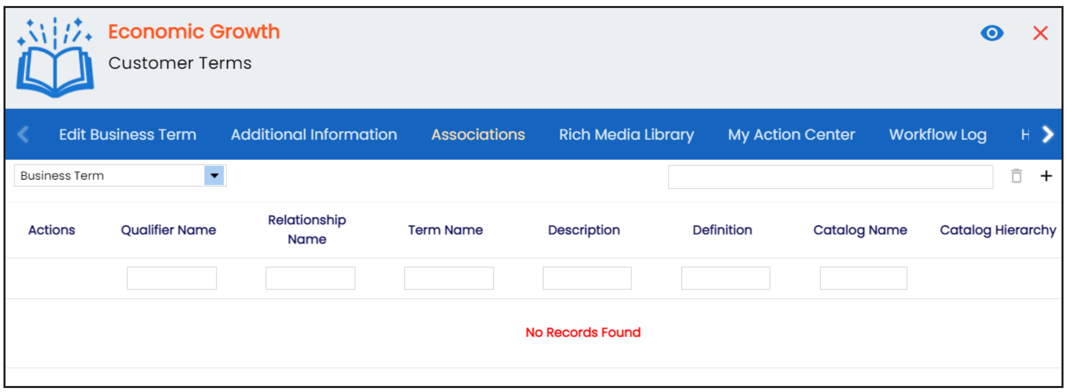
By default, you can associate business terms with business assets (business policies and other business terms) and technical assets (columns, environments, and tables). You can control the available asset types for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

To set up associations, follow these steps:

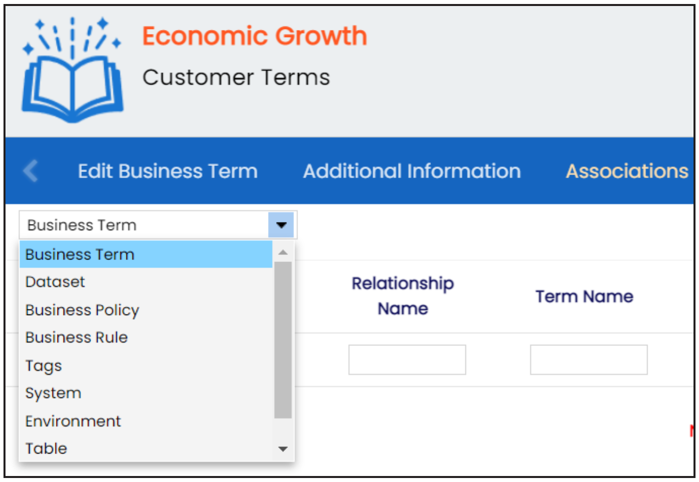
1. On the **Compact View** tab, click .

   Alternatively, on the **Grid View** tab, under the **Options** column, click . Then, click **Associations**.

   The Associations tab opens in edit mode.

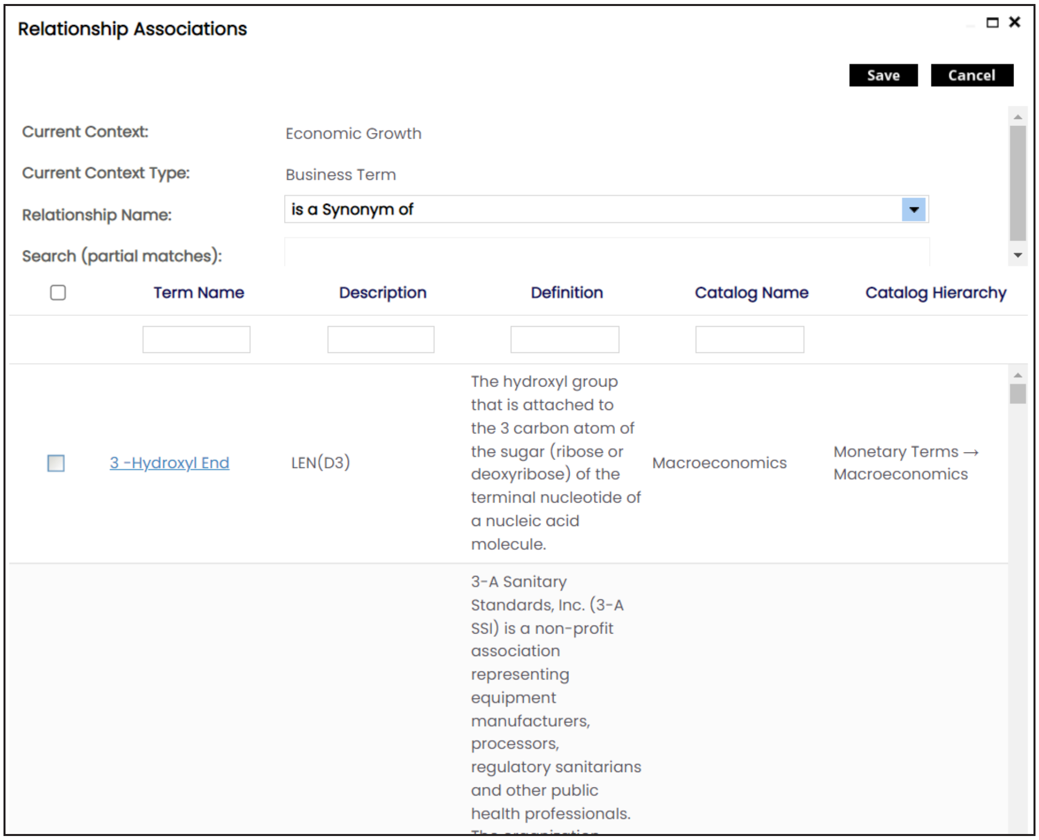
   

2. In the asset type (business policies, business terms, columns, environments, and tables) list, select an asset type to associate with the business term.



3. Click +.

   The Relationship Associations page appears. Based on the asset type that you select, it displays a list of available assets.



4. Select assets to associate with your business term.
   If you know the asset name, use the Search (partial matches) field to look up for it.
5. Click **Save**.
   The selected assets are associated with the business term and added to the list of associations.
   You can define as many associations as required.

You can associate multiple business assets with a business term and view the associations based on a qualifier view in the mind map. For more information, refer to the topic Setting Up Associations using Qualifiers topic.

Setting Up Additional Details

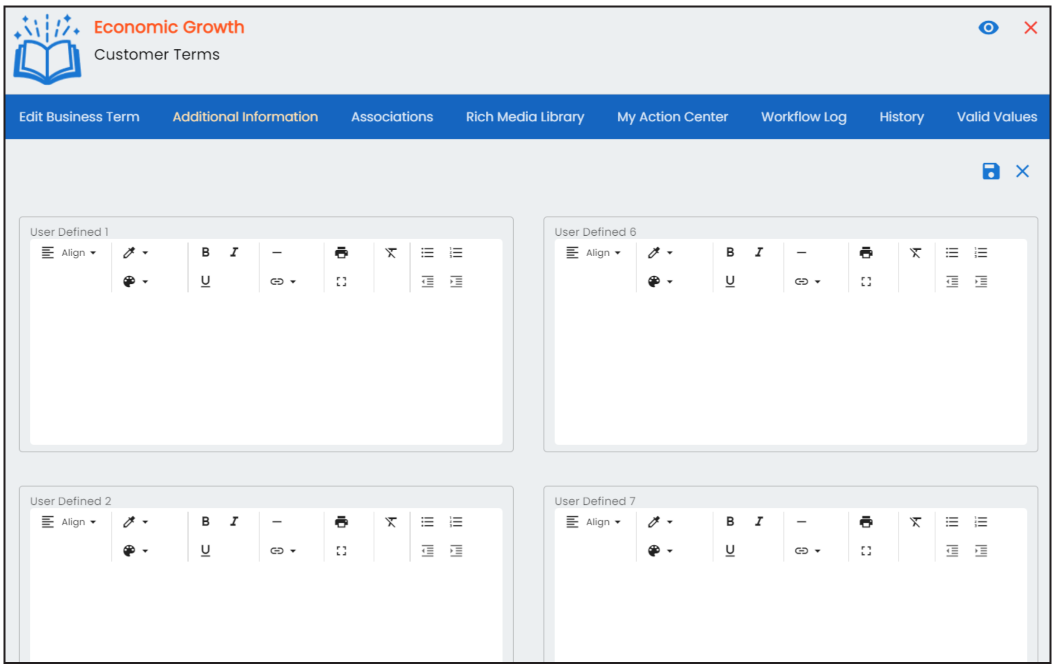
You can set up custom additional information about a business term to add more context.

To set up additional information, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.
   The business term opens in edit mode.

2. Click the **Additional Information** tab and click ✎ .



3. Add information to the available user-defined fields.
   By default, these fields have generic labels. For example, User Defined 1. For more information on configuring the UI labels of these fields, refer to the Configuring Language Settings topic.

4. Click 💾.
   The information you entered is added to the business term.

Adding Rich Media

You can add supporting artifacts, such as text files, audio files, video files, and so on to a business term.

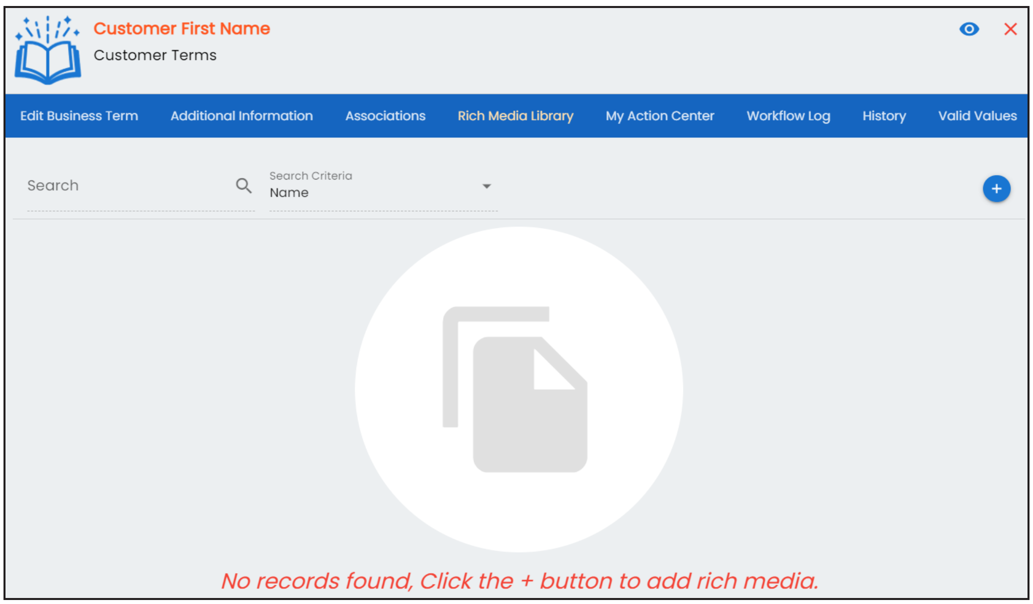
To add rich media to business terms, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.

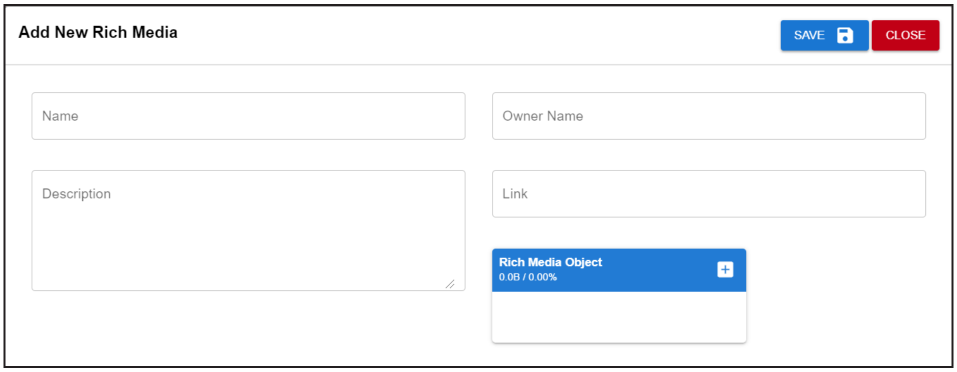
   The business term opens in edit mode.

2. Click the **Rich Media Library** tab.



3. Click .

   The Add New Rich Media page appears.



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

Field Name	Description
Name	Specifies the name of the rich media being attached to the business term. For example, Business Term Details.
Description	Specifies a description of the rich media that is being added.
Owner Name	Specifies the document owner's name. For example, John Doe
Link	Specifies the URL of the rich media. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Rich Media Object	Click the **Pick Files** button to choose and upload files from your computer.

5. Click **Save**.

   The selected rich media file and its description are added to the business term.

Adding Tasks

To collaborate on business assets you can create tasks depending on you requirement. By default, you can create to-do tasks, access requests, or issues. Apart from these task types, you can configure custom task types via Task Type Configuration.

To add tasks, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.
   The business term opens in edit mode.

2. Click the **My Action Center** tab.

3. Click .
   A list of task types appears.

4. Click the required task type.
   The Create New Task page appears.

5. 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 created. This field autopopulates with the map name.
With Task Type as	Specifies the task type. For example, To do Task.
Name	Specifies the name of the task. By default, it autopopulates with a name in the following format: Mapping_<Map_Name>. You can edit it and rename the task. For example, Test Mappings.
Description	Specifies a description of a task. For example: Test all the mappings and record the effort required.

Field Name	Description
Important	Specifies whether the task is important
Due	Specifies the due date of the task. Use to set the due date.
Assign Users	Specifies the users assigned to the task. You can assign DI and BU users from the list. For example, Richard Cooper.
External user emails	Specifies the email ID of external users. For example, chris.harris@quest.com

6. Click .

   The task is created and saved. Use to edit the task details and attach relevant documents.

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:

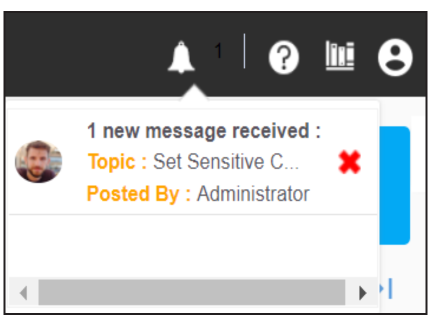
Assigned

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.



You can manage a task using the options available on the task list. Managing a task involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading Chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

With the My Action Center tab, you can filter and search tasks based on its status and assignments. For more information on search and filter mechanisms, refer to the Filter and Search topic.

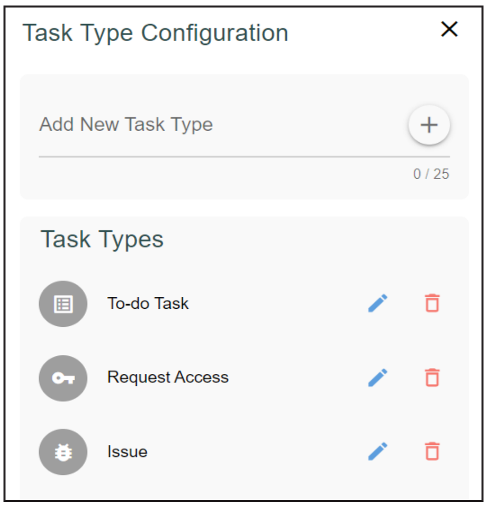
Configuring Task Types

You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue, are available. You cannot edit or delete these task types.

To configure task types, follow these steps:

1. In the utility section, click .

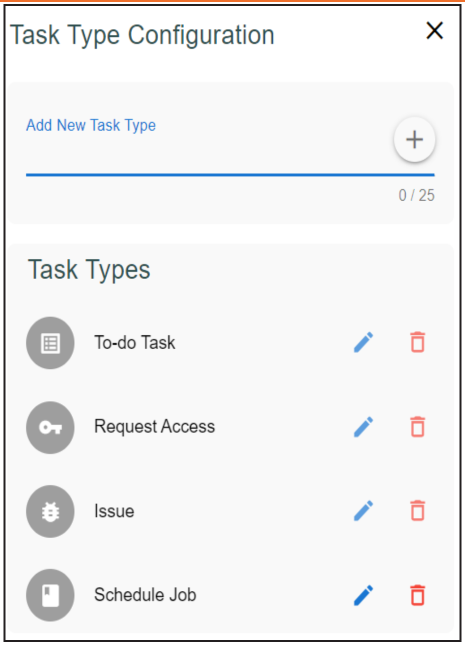
   The Task Type Configuration pane appears. It displays a list of available task types.

2. In the Add New Task Type box, enter a new task type and click .

   The task type is added tp the list of available tasks.

   For example, in the following image, a task type, Schedule Job is added.



Use the following options to manage task types:

Edit ( )

Use this option to edit task types.

Delete ( )

Use this option to delete task types.

Managing Tasks

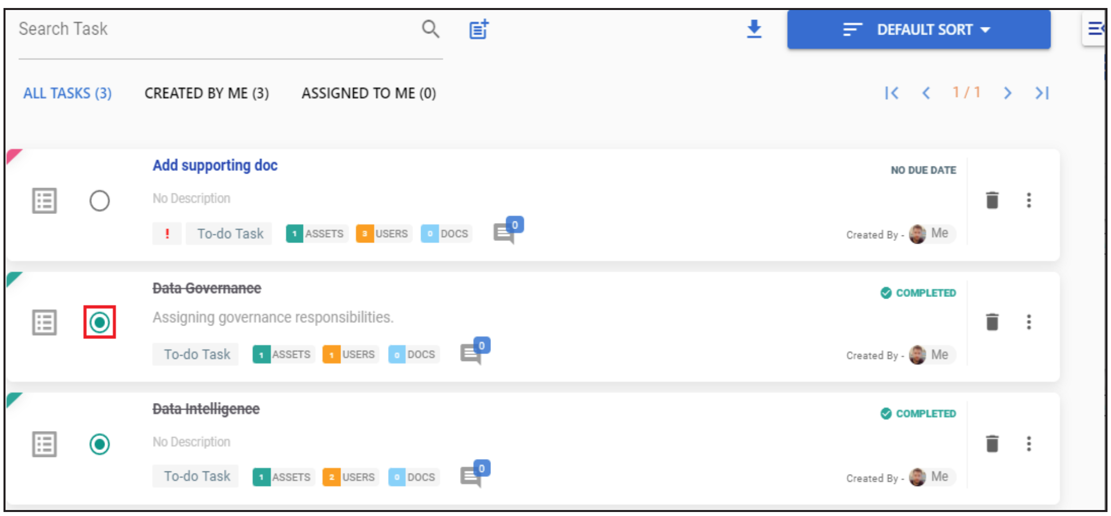
Managing tasks involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

To mark tasks complete, on a task tile, click the radio button.

The task is moved to the list of completed task.

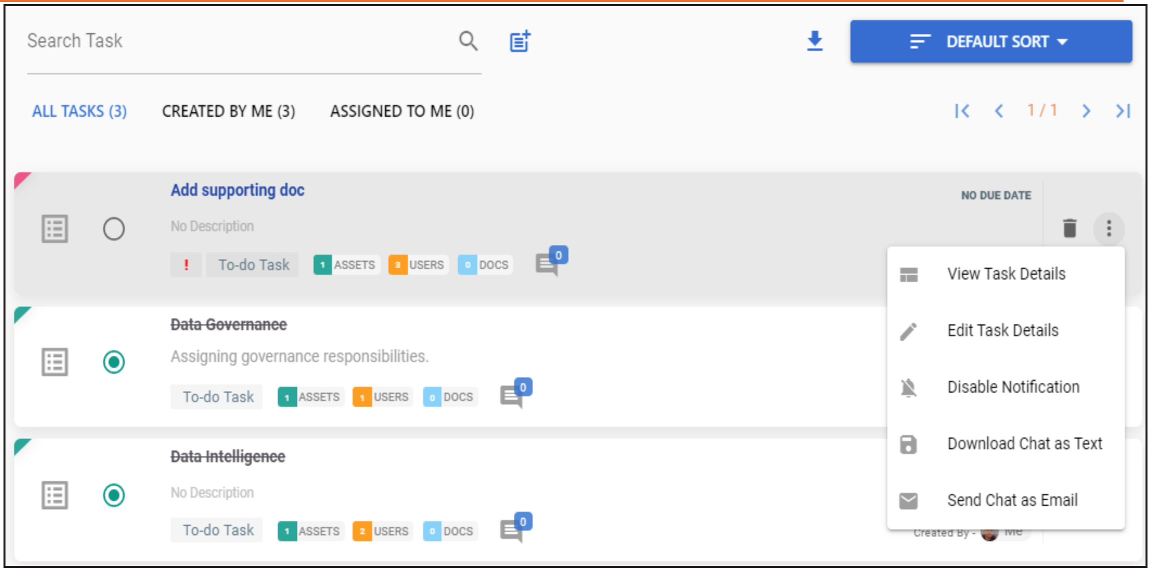
For example, in the following image, the tasks with strike-through are marked complete.



To further manage tasks, follow these steps:

1. On a task tile, click ⋮.

   The available options appear.



2. Use the following options to work on tasks:

View Task Details

Use this option to view task details. These details include task name, description, assigned assets, attached documents, and so on.

Alternatively, you can click a task tile to view its details.

Edit Task Details

Use this option to update task details.

Disable Notification

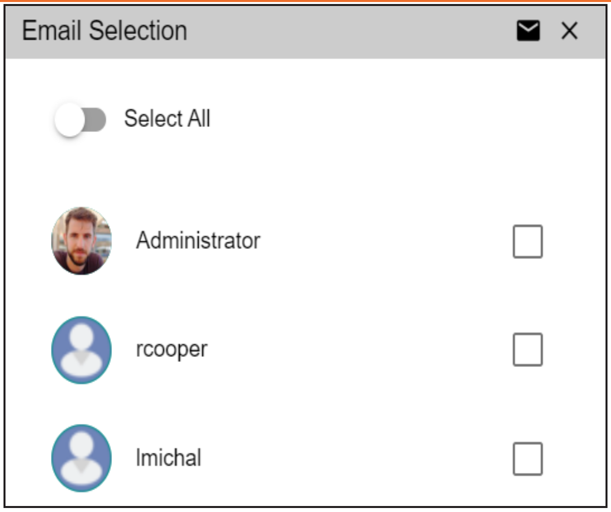
Use this option to stop receiving notifications related to a task. By default, notifications are enabled, and users assigned to a task receive them.

Download Chat as Text

Use this option to download chats related to a task in the TXT format.

Send Chat as Email

Use this option to share chats related to a task via email. To do this, click **Send Chat as Email**.
The Email Selection page appears. It displays a list of users assigned to the task.



Select the required users, and then click . An email is sent to the selected users.

Mark as Pending

Use this option to mark a task as pending. This option is available for completed tasks.

To delete a task, on a task tile, click .

You can only delete a tasks that you created.

Viewing Workflow Logs

You can view the flow of actions of the workflow assigned to a business term. Along with other information, the workflow log displays the current state of the business term in the workflow.

To view the workflow log, follow these steps:

1. On the **Compact View** tab, click . Then, click .
   Alternatively, on the **Grid View** tab, under the **Options** column, click .
   The business term opens in edit mode.
2. Click the **Workflow Log** tab.
   By default, it displays only the stages of the workflow and highlights the current stage. Use the following options to view more information:

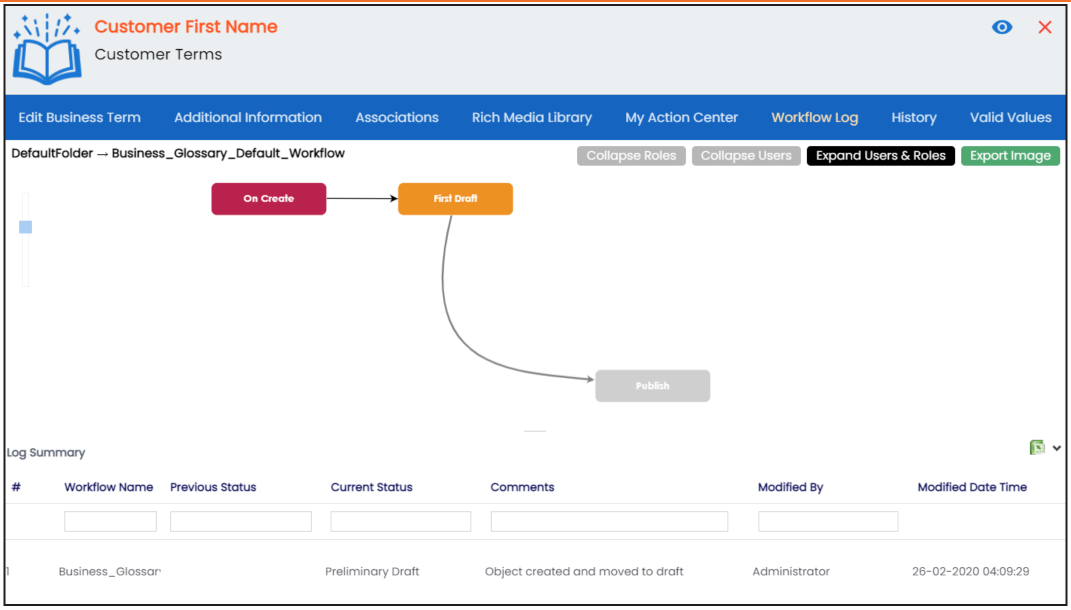
   Expand Users & Roles

   Use this option to display users and roles associated with each workflow stage. You can choose to hide users or roles using the Collapse Users and Collapse Roles options.

   Log Summary

   Use this pane to view the log of the actions performed.

Viewing Workflow Logs



You can export the workflow log summary in XLSX format. Click to export the summary.

Assigning Valid Values

You can associate valid values (published codesets) to a business term. This enables you to maintain standard codes for business terms across the organization.

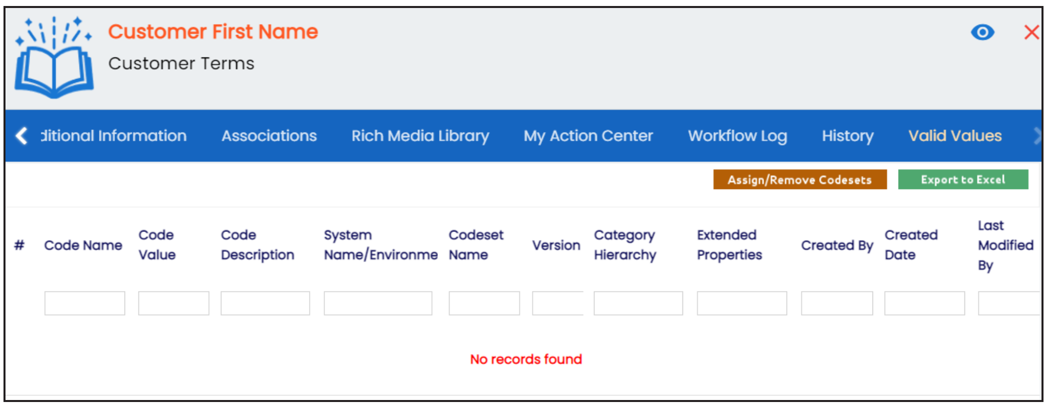
To assign valid values, follow these steps:

1. On the **Compact View** tab, click . Then, click .

   Alternatively, on the **Grid View** tab, under the **Options** column, click .

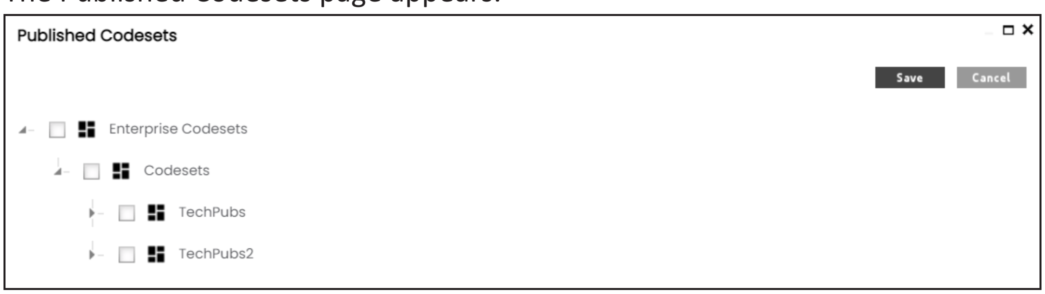
   The business term opens in edit mode.

2. Click the **Valid Values** tab.



3. Click **Assign/Remove Codesets**.

   The Published Codesets page appears.



4. Select codesets.

5. Click **Save**.

   The selected codesets are associated with the business term and are added to the Valid Values list.

To export the list of valid values, click **Export to Excel**.

Viewing History

You can view and track a list of changes made to a business term. The History tab displays change status, added records, and more.

To view the history of business terms, follow these steps:

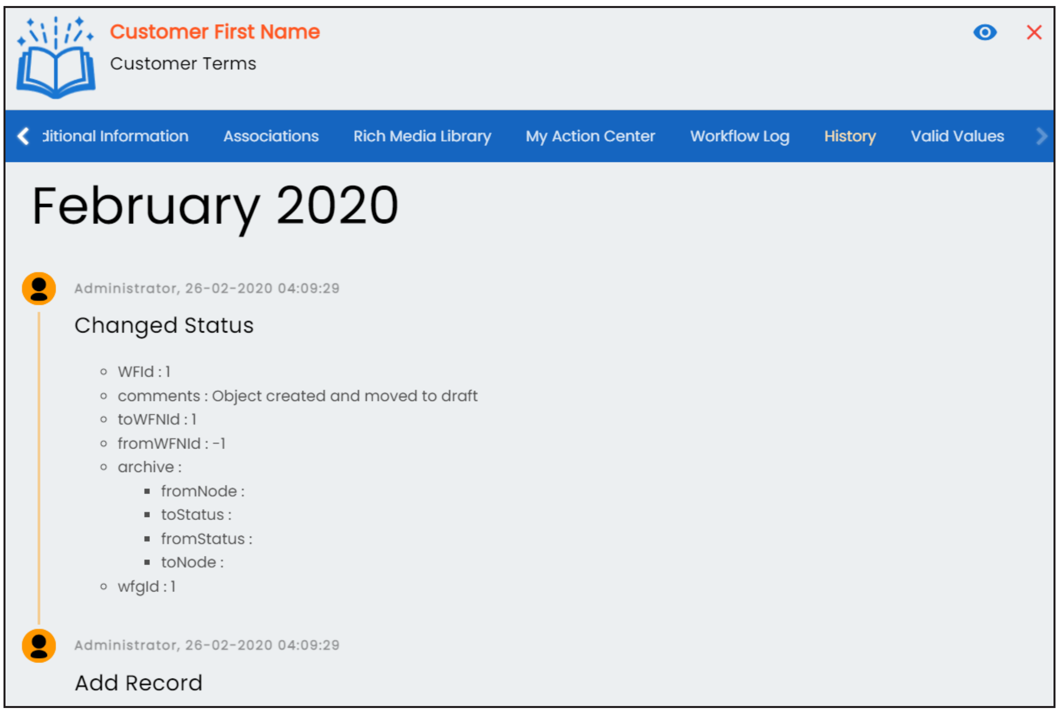
1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.

   The business term opens in edit mode.

2. Click the **History** tab.

   From the History tab, you can view the change history related to a business term.



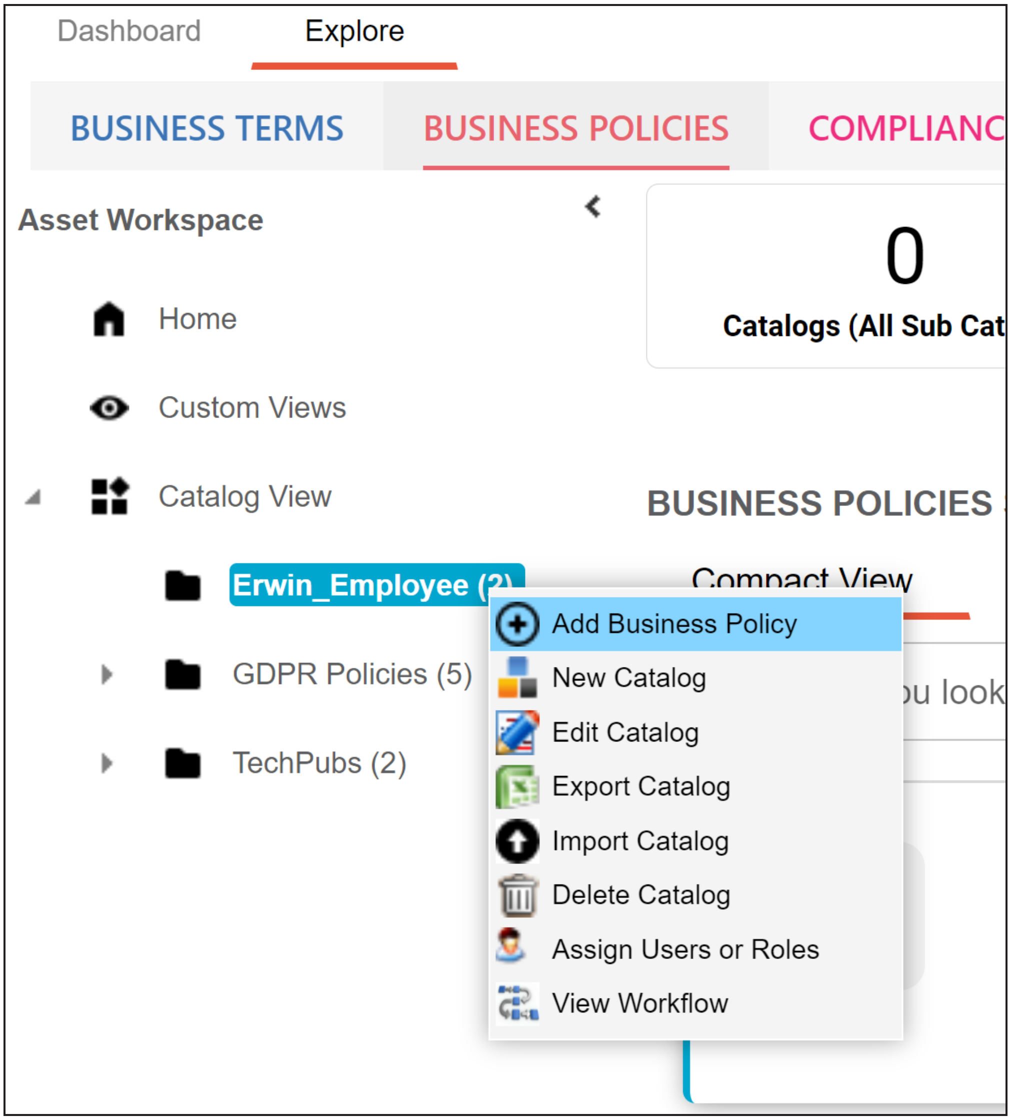
Creating Business Policies

Business policies are globally defined set of enterprise-level principles. Using business policies, you can maintain business standards across your organization. You can create business policies in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

To create business policies, follow these steps:

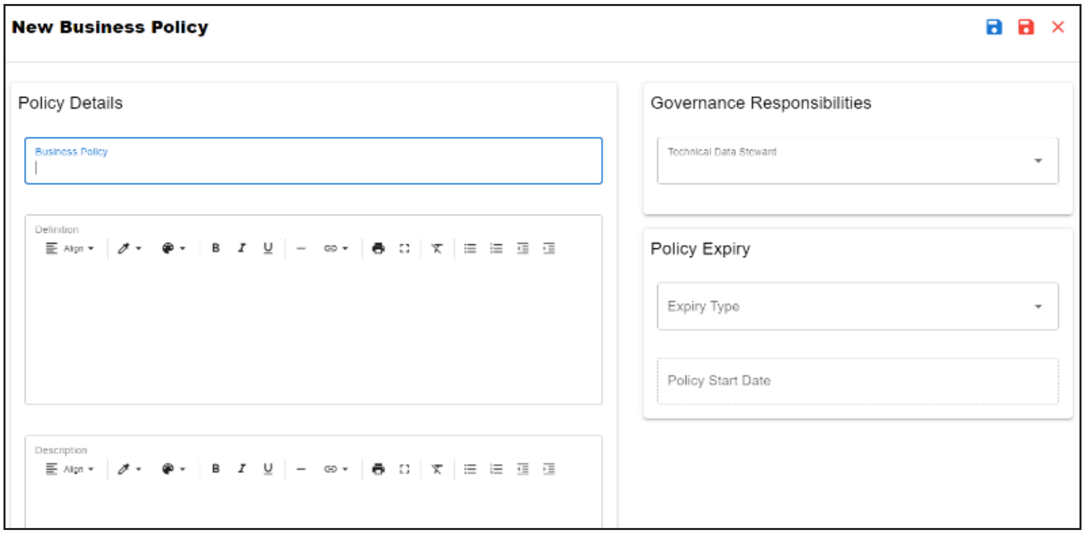
1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**.
2. Go to the **Business Policies** tab.

3. In the **Asset Workspace** pane, right-click a catalog.



4. Click **Add Business Policy**.

   The New Business Policy page appears.



5. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

   Refer to the following table for field descriptions.

Field Name	Description
Business Policy	Specifies the business policy of the organization. For example: Customer Phone Policy.
Definition	Specifies the definition of the business policy. For example: Customer phone policy cuts down on distraction and frustration at work by making it clear when it's ok and not ok to use a cell phone during work hours.
Description	Specifies the description of the business policy. For example: Cell phones should not be allowed to distract employees from business tasks and for surfing the internet or gaming during work hours.
Notes	Specifies the description of the business policy. For example: It includes privacy law 1966.
Governance	Specifies the users assigned with data governance responsibilities for

Field Name	Description
Responsibilities	the business assets. For more information, refer to Updating Data Governance.
Policy Expiry	**Expiry Type**: Specifies the expiry type of a business policy. Use the following available options: • **No Expiry**: Indicates that the policy never expires • **Limited Duration**: Indicates that the policy expires on its end date **Policy Start Date**: Specifies the start date of a policy **Policy End Date**: Specifies the end date of a policy. This option is available only when Expiry Type is set to Limited Duration.
Classification	Specifies the sensitive data indicator (SDI) classification of the business policy. Also, you can add multiple SDI classifications to a business policy. For example, PHI. For more information on configuring SDI classifications, refer to the Configuring Sensitive Data Indicator Classifications topic.

> By default, SDI field Classification is not enabled for business policies. You can enable them in the Business Glossary Manager Settings. For more information on enabling sensitivity fields, refer to the Configuring Asset Details topic.

6. Click .
   A business policy is created and added to the catalog.

Once you create a business policy, you can click a business policy in the Business Policy Summary pane to view it. You can enrich it further by:

- Setting up associations
- Setting up additional information
- Adding rich media
- Adding tasks

- Viewing workflow logs
- Comparing business policies

You can manage a business policy using the options available in the Options column in the business policy row. Managing business policy involves:

- Viewing mind maps
- Viewing history
- Editing or deleting business policies
- Sharing links of business policies

Managing Business Policies

Managing business policies involves:

- Viewing mind maps
- Editing or deleting business policies
- Viewing history
- Sharing links to business policies

To manage business policies, follow these steps:

1. On the **Compact View** tab, click ⋮.

   Alternatively, on the **Grid View** tab, use the **Options** column for a business policy.

2. Use the following options available under the Options column:

   View Mind Map ( )

   Use this option to view a business term's mind map. A mind map displays the pictorial representation of the business term, its associations, relationships, sensitivity, and more in a logical and conceptual view.
   For more information on mind maps, refer to the Viewing Mind Maps topic.

   Edit Business Policy ( )

   Use this option to edit a business policy by updating policy details, governance responsibilities, and so on. For more information on editing business policies, refer to the Viewing or Editing Business Policies.

   Delete Business Policy ( )

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

   View History ( )

   Use this option to view all the actions performed on a business policy since it was created. Alternatively, on the Edit Business Policy page, click the **History** tab.

   Share Link ( )

Use this option to share a link to a business policy. The following options are available to share the link:

Copy Link: Use this option to copy the shortcut link to the business policy. You can then share this link manually.

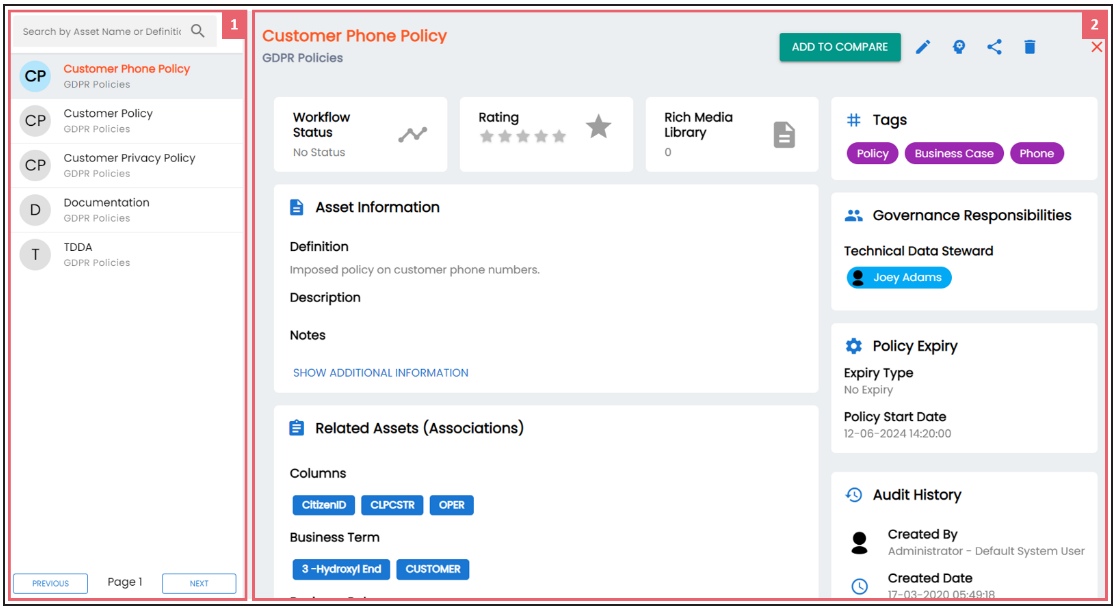
Email: Use this option to share the shortcut link to the business policy via an email.

Viewing or Editing Business Policies

You can view business policy details and their properties on the View Business Policy tab. On the **Business Policies Summary** page, click a business policy.

Apart from viewing and editing business policies, you can also compare them while viewing business policies.

The business policy summary page appears.



UI Section	Function
1-Business Policy List	Use this pane to browse through the list of business policies.
2-Policy Details	Use this section to view the business policy details. Apart from viewing business policy, you can view or edit the following business policy properties: ▪ Asset Information ▪ Workflow Status ▪ Governance Responsibilities ▪ Policy Expiry

	▪ Miscellaneous

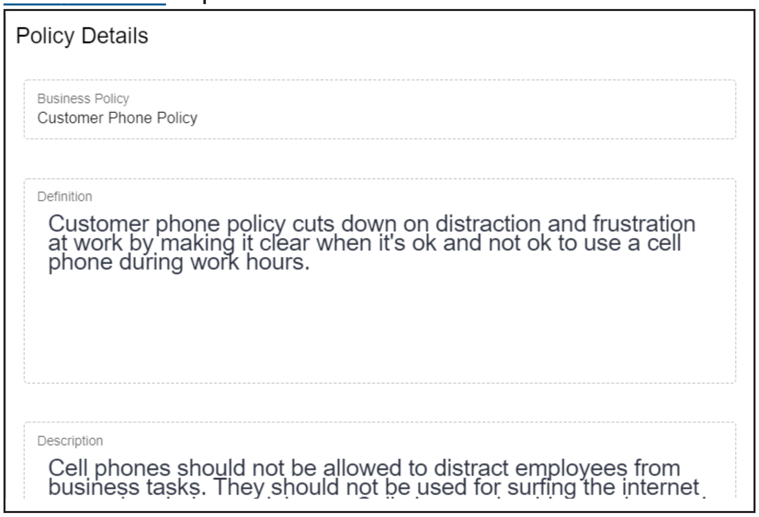
Editing Business Policies

To edit a business policy, follow these steps:

1. On the business policy summary page, click .
2. On the Edit Business Policy tab, use the following options:

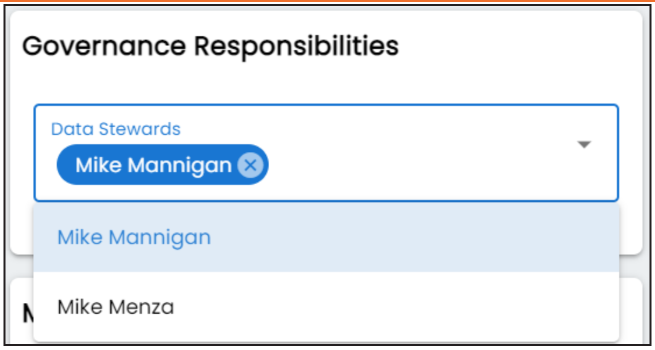
   Policy Details

   Use this section to edit business policy's details, such as its definition and description. For description of fields on this section, refer to the Creating Business Policies topic.

   Governance Responsibilities

   Use this section to edit governance responsibilities assignment. It displays roles groups based on the roles and users assigned to a business policy catalog. To edit governance responsibilities, click a role group and add or remove users. For example, in the following image, Mike Mannigan is added to the Data Stewards role group.



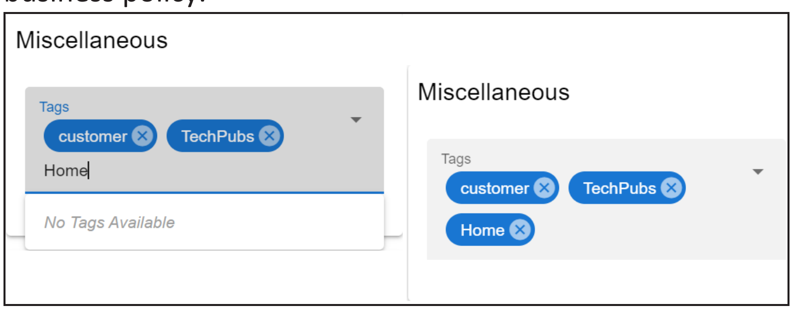
For more information on assigning roles and users to a catalog, refer to the Updating Data Governance Assignments topic.

Policy Expiry

Use this section to edit the life time of a business policy. For description of fields on this section, refer to the Creating Business Policies topic.

Miscellaneous

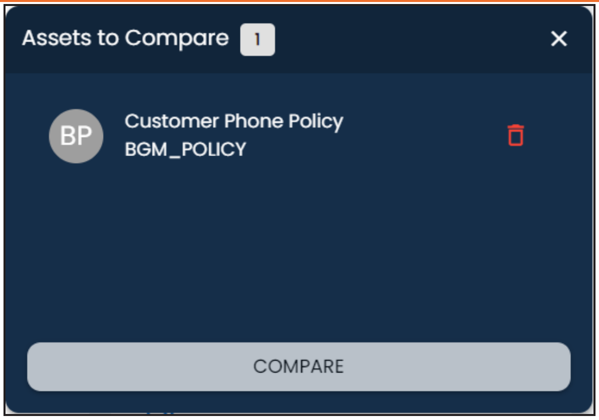
Use this section to associate enterprise tags with business policies. Click **Tags** and select an existing tag or enter a tag name to create one on the fly.
For example, in the following image, a tag, "Home", is created and assigned to a business policy.



Comparing Business Policies

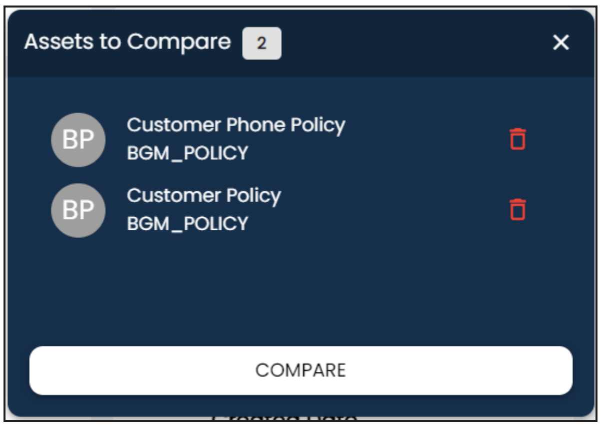
To compare business policies while viewing them, follow these steps:

1. On the Assets Details page, click **Add to Compare**.
   The Assets to Compare sheet appears.



2. On the Business Policy List, select other assets that you want to compare and click **Add to Compare**.

   The selected asset is added to the Assets to Compare sheet.



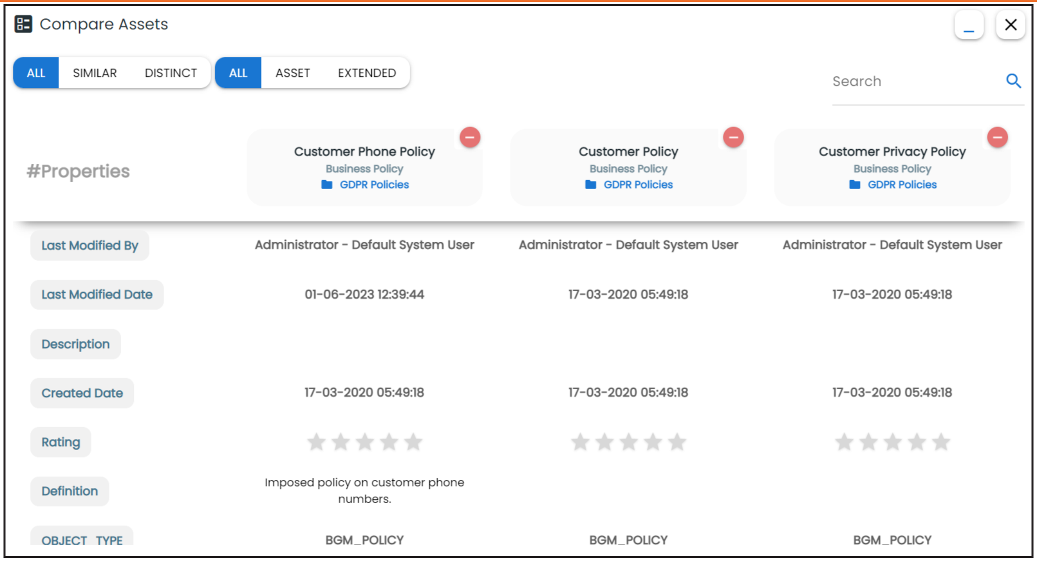
   You can click to remove assets from the list.

   Repeat this step to add more assets for comparison.

> You can select up to five assets for comparison.

3. Click **Compare**.

   The Compare Assets page appears and displays the side by side comparison of asset properties for the selected assets.



For more information about comparing assets based on properties, refer to the Comparing Business Assets topic.

Setting Up Associations for Business Policies

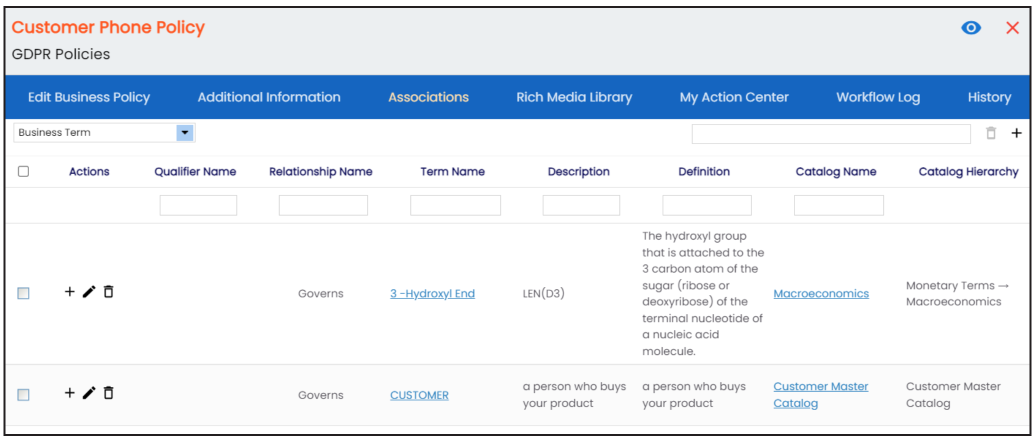
By default, you can associate business policies with business assets (business rules and business terms) and technical assets (columns). You can control the asset types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

To set up associations for business policies, follow these steps:

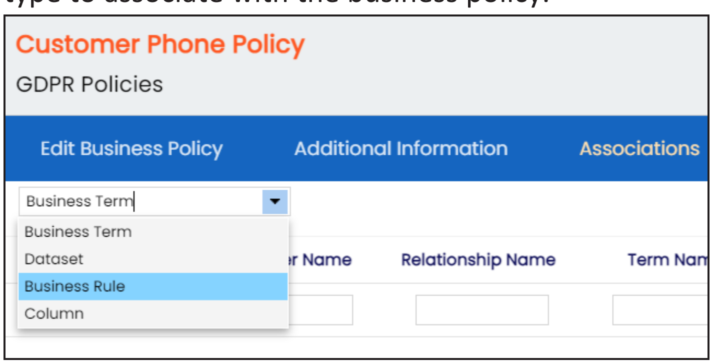
1. On the **Compact View** tab, click .

   Alternatively, on the **Grid View** tab, under the **Options** column, click . Then, click **Associations**.

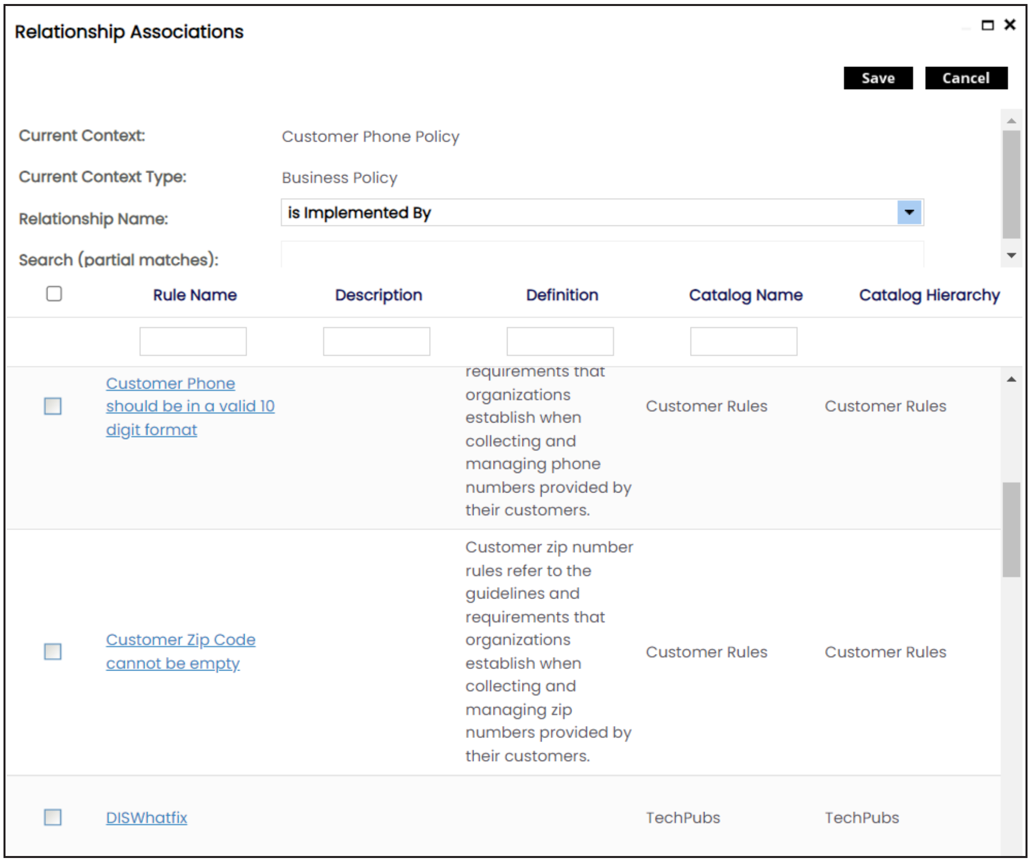
   The Associations tab opens in edit mode.

2. In the asset type (business rules, business terms, and columns) list, select the asset type to associate with the business policy.

3. Click +.
   The Relationship Associations page appears. Based on the asset type that you select, it displays a list of available business rules, business terms, or columns.



4. From the list, select assets to associate with your business policy.
   If you know the asset name, use the Search (partial matches) field to look up for it.
5. Click **Save**.
   The selected assets are associated with the business policy and added to the list of associations for an asset type.
   You can define as many associations as required.

You can associate multiple business assets with a business policy and view the associations based on a qualifier view in the mind map. For more information, refer to the topic Setting Up Associations using Qualifiers topic.

Setting Up Additional Details

You can set up custom additional information about a business policy to add more context.

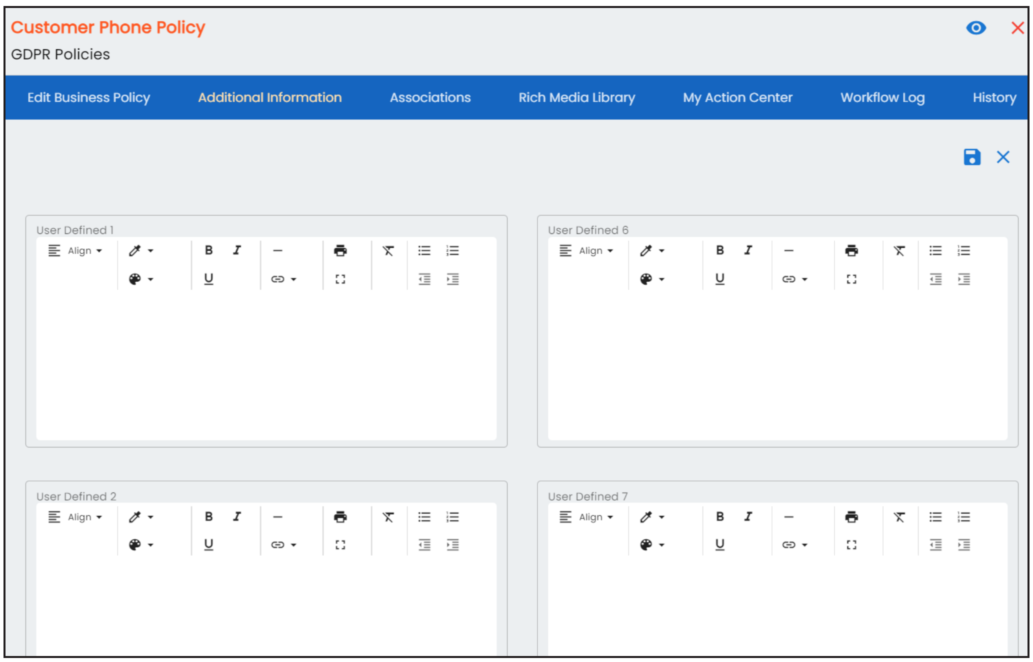
To set up additional information, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the Options column, click ✎.

   The business policy opens in edit mode.

2. Click the **Additional Information** tab and click ✎.



3. Add information to the available user-defined fields.
   By default, these fields have generic labels. For example, User Defined 1. For more information on configuring the UI labels of these fields, refer to the [Configuring Language Settings](#) topic.

4. Click the save icon.
   The information you entered is added to the business policy.

Adding Rich Media

You can add supporting artifacts, such as text files, audio files, video files, and so on to a business policy.

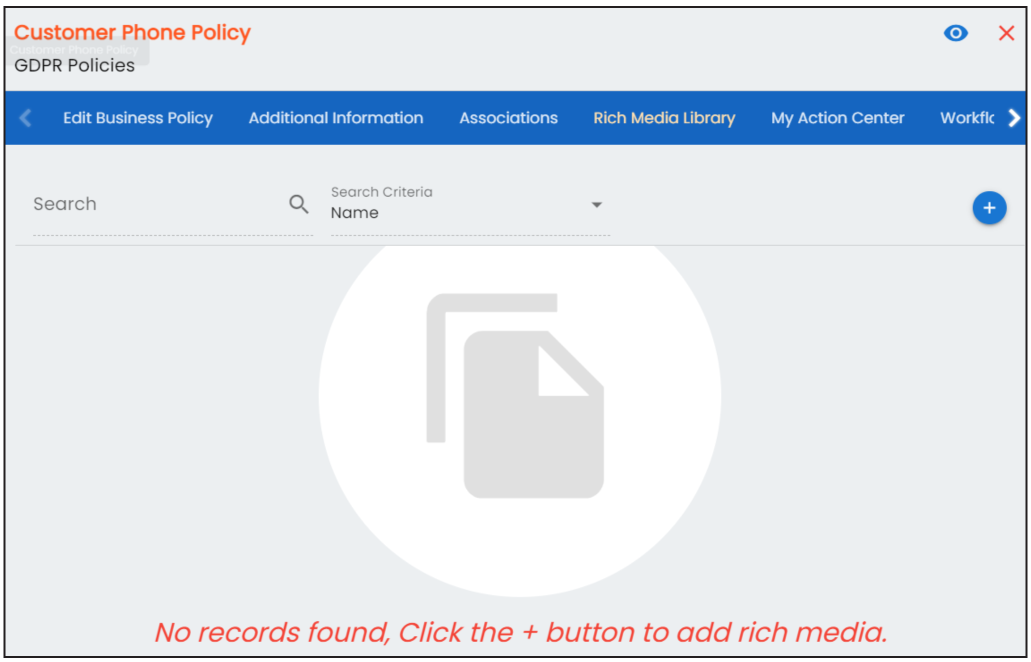
To add rich media to a business policy, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.

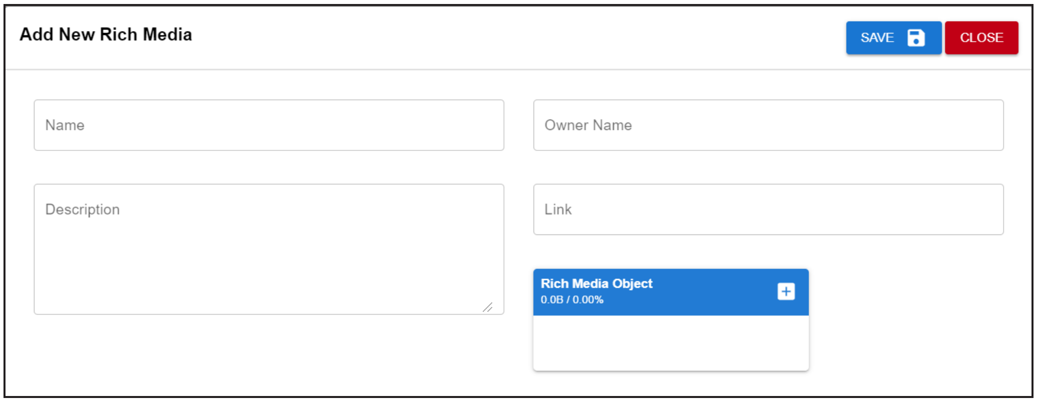
   The business policy opens in edit mode.

2. Click the **Rich Media Library** tab.



3. Click .

   The Add New Rich Media page appears.



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

Field Name	Description
Name	Specifies the name of the document being attached to the business policy. For example, Business Policy Details.
Description	Specifies a description of the rich media that is being added.
Owner Name	Specifies the document owner's name. For example, John Doe
Link	Specifies the URL of the rich media. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Rich Media Object	Click the **Pick Files** button to choose and upload files from your computer.

5. Click **Save**.

   The selected rich media file and its description are added to the business policy.

Adding Tasks

To collaborate on business assets you can create tasks depending on you requirement. By default, you can create to-do tasks, access requests, or issues. Apart from these task types, you can configure custom task types via Task Type Configuration.

To add tasks, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.
   The business policy opens in edit mode.

2. Click the **My Action Center** tab.

3. Click .
   A list of task types appears.

4. Click the required task type.
   The Create New Task page appears.

5. 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 created. This field autopopulates with the map name.
With Task Type as	Specifies the task type. For example, To do Task.
Name	Specifies the name of the task. By default, it autopopulates with a name in the following format: Mapping_<Map_Name>. You can edit it and rename the task. For example, Test Mappings.
Description	Specifies a description of a task. For example: Test all the mappings and record the effort required.

Field Name	Description
Important	Specifies whether the task is important
Due	Specifies the due date of the task. Use to set the due date.
Assign Users	Specifies the users assigned to the task. You can assign DI and BU users from the list. For example, Richard Cooper.
External user emails	Specifies the email ID of external users. For example, chris.harris@quest.com

6. Click .

   The task is created and saved. Use to edit the task details and attach relevant documents.

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:

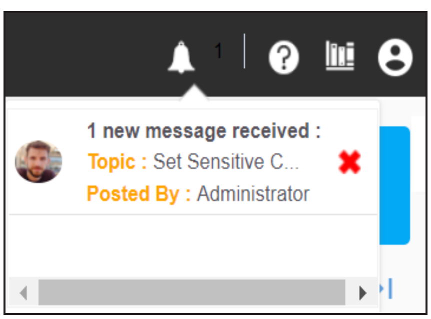
Assigned

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.



You can manage a task using the options available on the task list. Managing a task involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading Chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

With the My Action Center tab, you can filter and search tasks based on its status and assignments. For more information on search and filter mechanisms, refer to the Filter and Search topic.

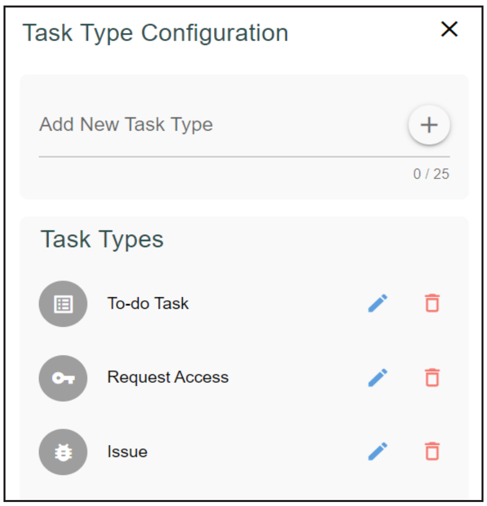
Configuring Task Types

You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue, are available. You cannot edit or delete these task types.

To configure task types, follow these steps:

1. In the utility section, click .

   The Task Type Configuration pane appears. It displays a list of available task types.

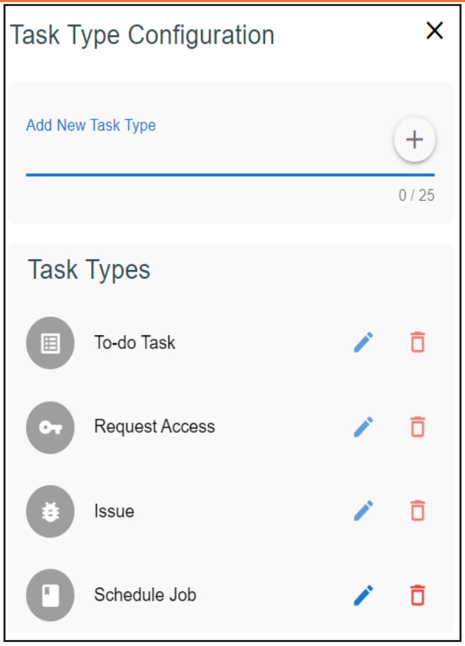
   

2. In the Add New Task Type box, enter a new task type and click .

   The task type is added tp the list of available tasks.

   For example, in the following image, a task type, Schedule Job is added.

Configuring Task Types



Use the following options to manage task types:

Edit ( )

Use this option to edit task types.

Delete ( )

Use this option to delete task types.

Managing Tasks

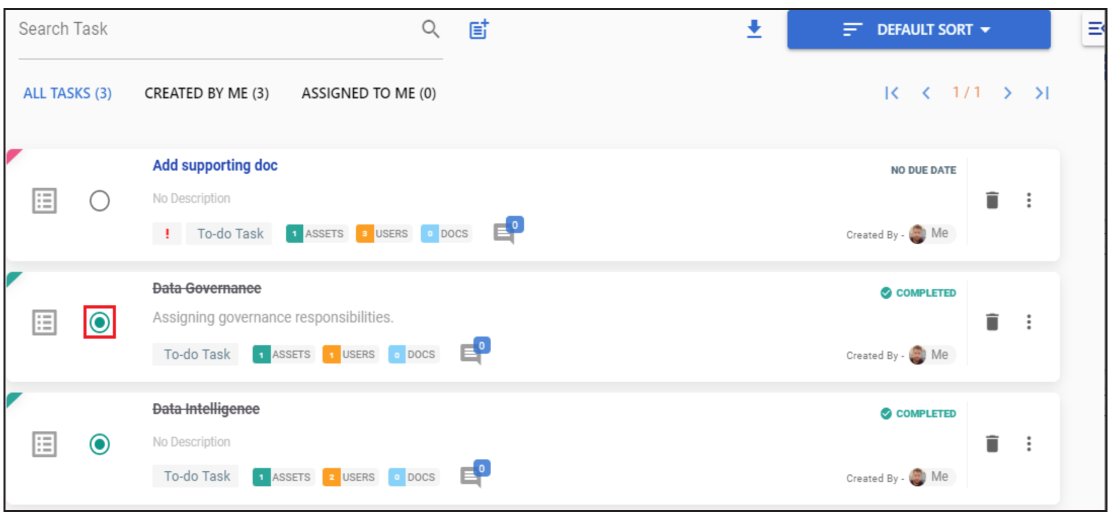
Managing tasks involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

To mark tasks complete, on a task tile, click the radio button.

The task is moved to the list of completed task.

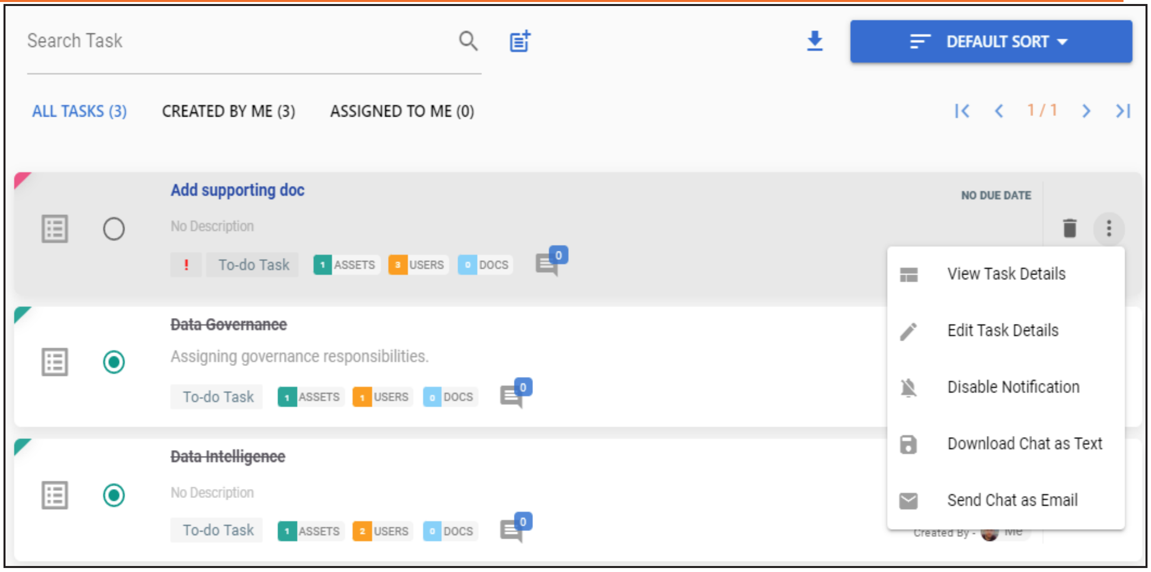
For example, in the following image, the tasks with strike-through are marked complete.



To further manage tasks, follow these steps:

1. On a task tile, click ⋮.

   The available options appear.



2. Use the following options to work on tasks:

View Task Details

Use this option to view task details. These details include task name, description, assigned assets, attached documents, and so on.

Alternatively, you can click a task tile to view its details.

Edit Task Details

Use this option to update task details.

Disable Notification

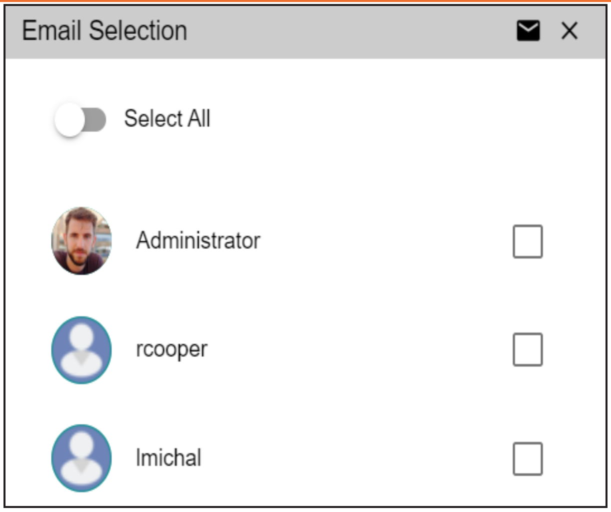
Use this option to stop receiving notifications related to a task. By default, notifications are enabled, and users assigned to a task receive them.

Download Chat as Text

Use this option to download chats related to a task in the TXT format.

Send Chat as Email

Use this option to share chats related to a task via email. To do this, click **Send Chat as Email**.
The Email Selection page appears. It displays a list of users assigned to the task.



Select the required users, and then click . An email is sent to the selected users.

Mark as Pending

Use this option to mark a task as pending. This option is available for completed tasks.

To delete a task, on a task tile, click .

You can only delete a tasks that you created.

Viewing Workflow Logs

You can view the flow of actions of the workflow assigned to a business policy. Along with other information, the workflow log displays the current state of the business policy in the workflow.

To view workflow log, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.

   The business policy opens in edit mode.

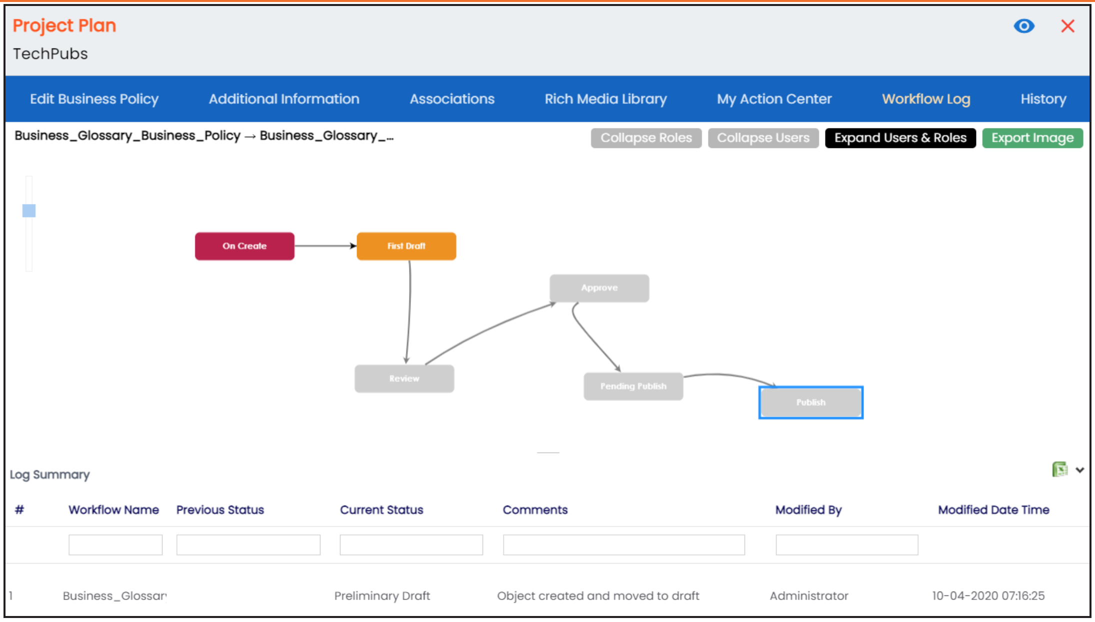
2. Click the **Workflow Log** tab.
   By default, it displays only the stages of the workflow and highlights the current stage. Use the following options to view more information:

   Expand Users & Roles

   Use this option to display users and roles associated with each workflow stage. You can choose to hide users or roles using the Collapse Users and Collapse Roles options.

   Log Summary

   Use this pane to view the log of the actions performed.



You can export the workflow log summary in XLSX format. Click  to export the summary.

Viewing History

You can view and track a list of changes for a business policy. The History tab displays change status, added records, and more.

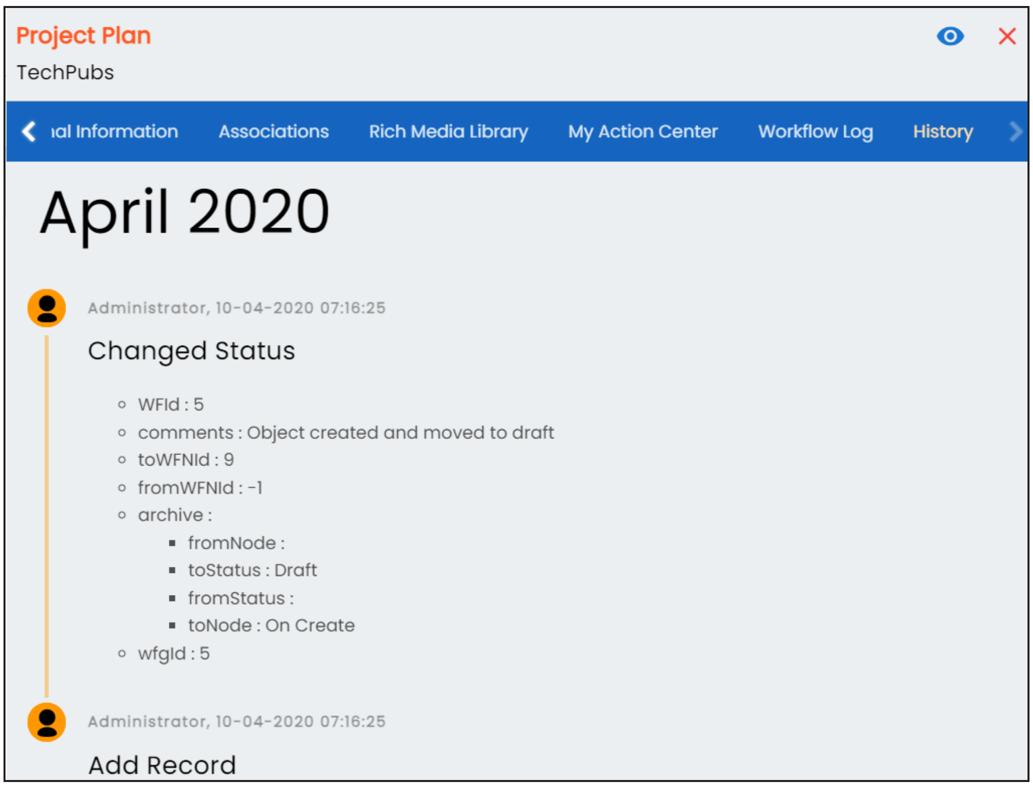
To view the history of a business policy, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.

   The business policy opens in edit mode.

2. Click the **History** tab.
   From the History tab, you can view the change history related to a business policy.

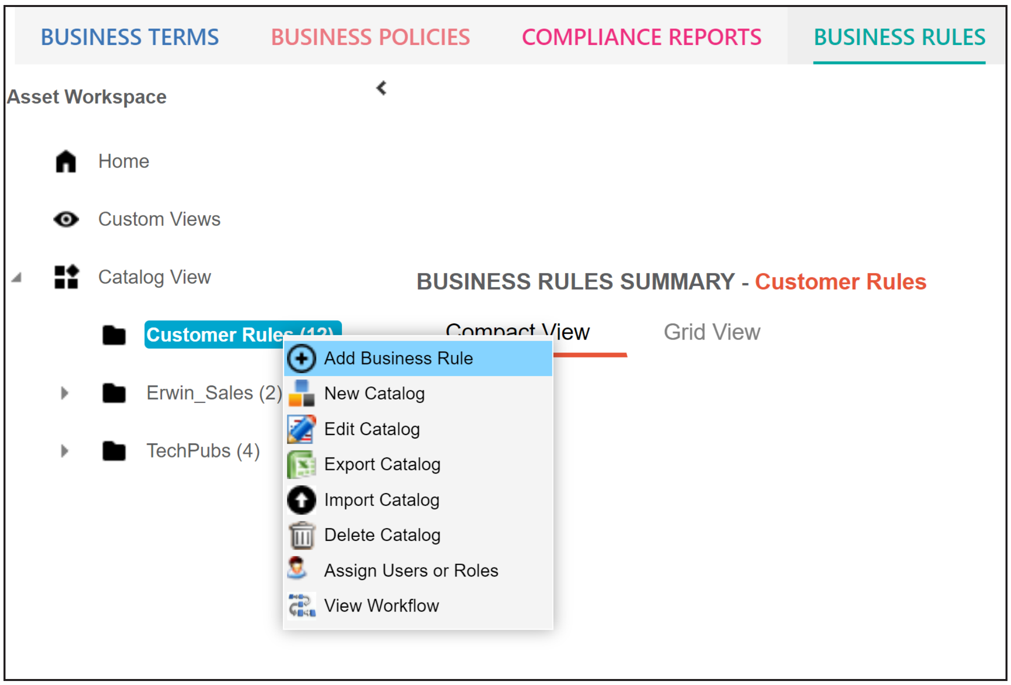


Creating Business Rules

Business rules define a set of protocols to be followed in an organization. You can create business rules in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

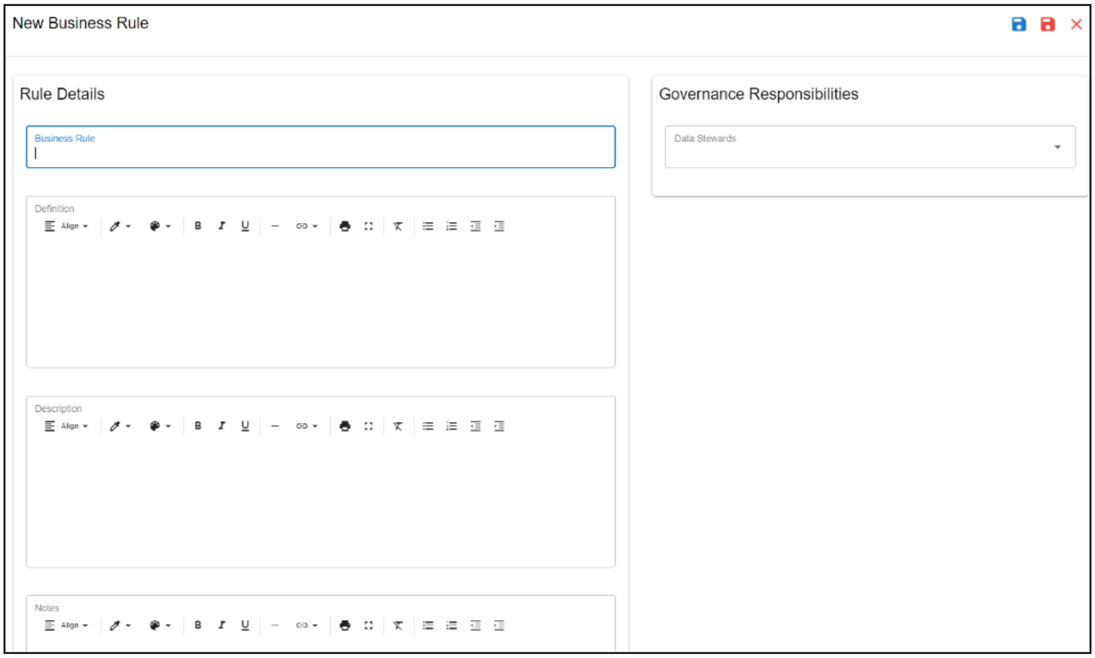
To create business rules, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**.
2. Go to the **Business Rules** tab.
   The Workspace switches to the business rules view.
3. In the **Asset Workspace** pane, right-click a catalog.



4. Click **Add Business Rule**.

   The New Business Rule page appears.



5. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

   Refer to the following table for field descriptions.

Field Name	Description
Business Rule	Specifies the business rule of the organization. For example: Agriculture rules.
Definition	Specifies the definition of a business rule. For example: Agricultural rules belong to the study of the special laws and regulations that apply to the production and sale of agricultural products.
Description	Specifies the description of a business rule. For example: It deals with such legal issues as agricultural infrastructure, seed, water, fertilizer, pesticide use, agricultural finance, agricultural labour, agricultural marketing, and agricultural insurance.

Field Name	Description
Notes	Specifies the notes of a business rule. For example: Rules cover farming laws of 1967.
Objective	Specifies the objective of a business rule. For example: Streamline agriculture practices.
Governance Respons-ibilities	Specifies the users assigned with data governance respons-ibilities for the business assets. For more information, refer to Updating Data Governance.
Classification	Specifies the sensitive data indicator (SDI) classification of the business rule. Also, you can add multiple SDI clas-sifications to a business rule. For example, PHI, Confidential. For more information on configuring SDI classifications, refer to the Configuring Sensitive Data Indicator Clas-sifications topic.

By default, SDI field Classification is not enabled for business rules. You can enable them in the Business Glossary Manager Settings. For more information on enabling sensitivity fields, refer to the Configuring Asset Details topic.

6. Click .

   A business rule is created and added to the catalog.

Once you create a business rule, you can click a business rule in the Business Rule Summary pane to view it. You can enrich it further by:

- Setting up associations
- Attaching rich media
- Viewing workflow logs
- Comparing business rules

You can manage a business rule using the options available under the Options column on the Grid View tab. Managing business rules involves:

- Viewing mind maps
- Viewing history
- Editing or deleting business rules
- Sharing links of business rules

Managing Business Rules

Managing business rules involves:

- Viewing mind maps
- Editing or deleting business rules
- Viewing history
- Sharing links to business policies

To manage business rules, follow these steps:

1. On the **Compact View** tab, click ⋮.
   Alternatively, on the **Grid View** tab, use the **Options** column for a business rule.

   You can also manage business rule in Compact View.
2. Use the following options available under the Options column:

   View Mind Map ( )

   Use this option to view a business rule's mind map. A mind map displays the pictorial representation of the business rule, its associations, relationships, sensitivity, and more in a logical and conceptual view.
   For more information on mind maps, refer to the Viewing Mind Maps topic.

   Edit Business Rule ( )

   Use this option to edit a business rule by updating rule details, governance responsibilities, and so on.
   For more information on editing a business rule, refer to the Viewing or Editing Business Rules topic.

   Delete Business Rule ( )

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

   View History ( )

   Use this option to view all the actions performed on a business rule since it was created. Alternatively, on the Edit Business Rule page, click the **History** tab.

Share Link( )

Use this option to share a link to a business rule. The following options are available to share the link:

Copy Link: Use this option to copy the shortcut link to the business rule. You can then share this link manually.

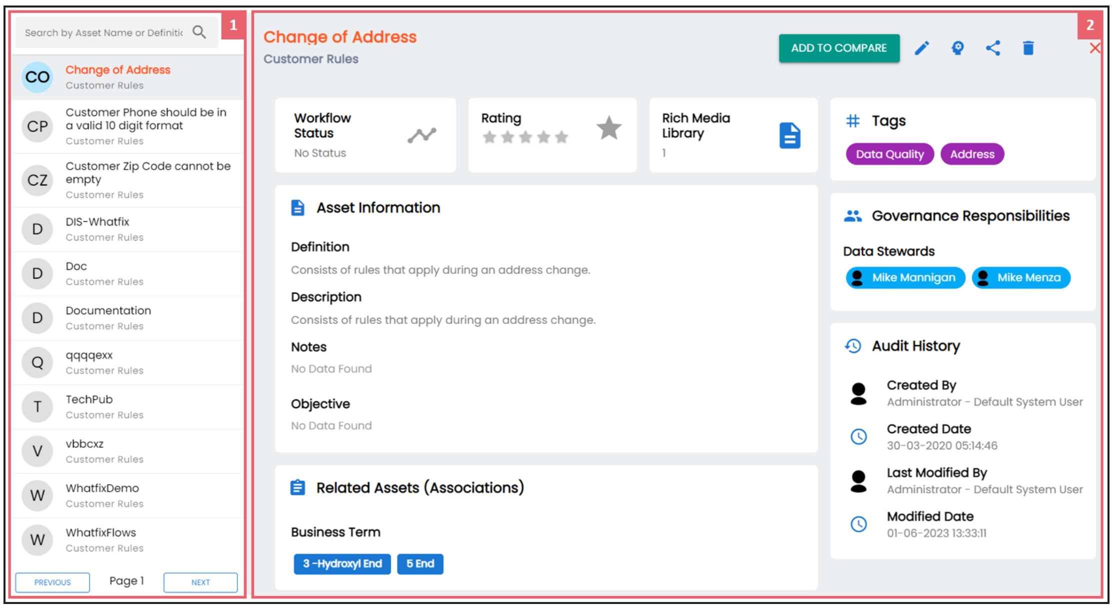
Email: Use this option to share the shortcut link to the business rule via an email.

Viewing or Editing Business Rules

You can view business rule details and their properties on the View Business Rule tab. On the **Business Rules Summary** page, click a business rule.

Apart from viewing and editing business rules, you can also compare them while viewing business rules.

The business rule summary page appears.



UI Section	Function
1-Business Rule List	Use this pane to browse through the list of business rules.
2-Asset Details	Use this section to view business rule details. Apart from viewing business rule, you can view or edit the following business rule properties: ▪ Asset Information ▪ Workflow Status ▪ Governance Responsibilities ▪ Miscellaneous

Editing Business Rules

To edit a business rule, follow these steps:

1. On the business rule summary page, click .
2. On the Edit Business Rule tab, use the following options:

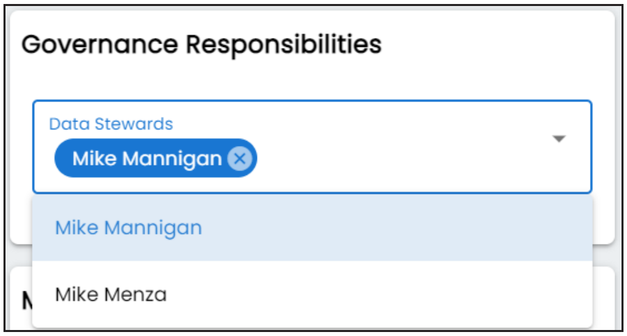
   Rule Details

   Use this section to edit business rule's details, such as its definition and description. For description of fields on this section, refer to the [Creating Business Rules](#) topic.

   Governance Responsibilities

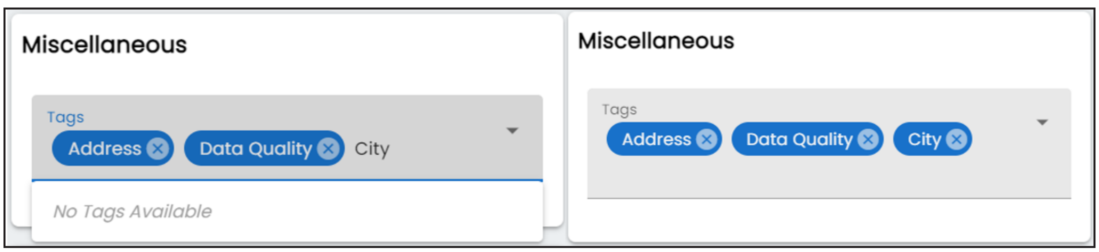
   Use this section to edit governance responsibilities assignment. It displays roles groups based on the roles and users assigned to a business rule catalog. To edit governance responsibilities, click a role group and add or remove users. For example, in the following image Mike Mannigan is added to the Data Stewards role group.



For more information on assigning roles and users to a catalog refer to the Updating Data Governance Assignments topic.

Miscellaneous

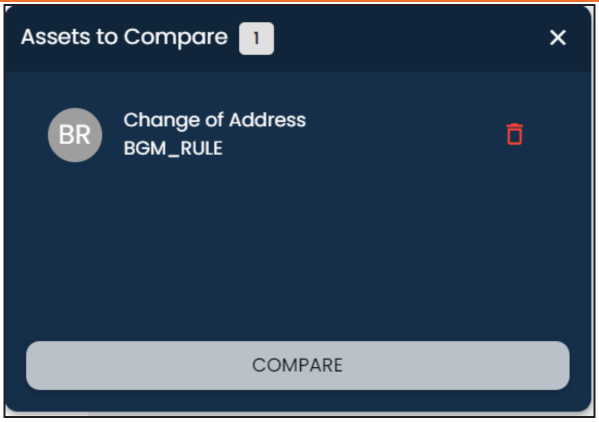
Use this section to associate enterprise tags with business rules. Click **Tags** and select an existing tag or enter a tag name to create one on the fly.
For example, in the following image, a tag, "City", is created and assigned to a business rule.



Comparing Business Rules

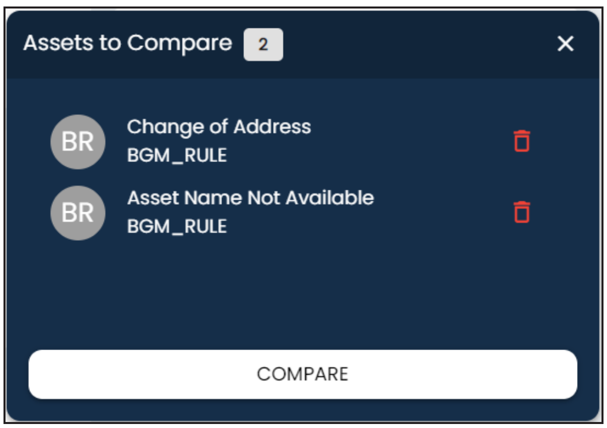
To compare business rules while viewing them, follow these steps:

1. On the Assets Details page, click **Add to Compare**.
   The Assets to Compare sheet appears.



2. On the Business Rule List, select other assets that you want to compare and click **Add to Compare**.

   The selected asset is added to the Assets to Compare sheet.



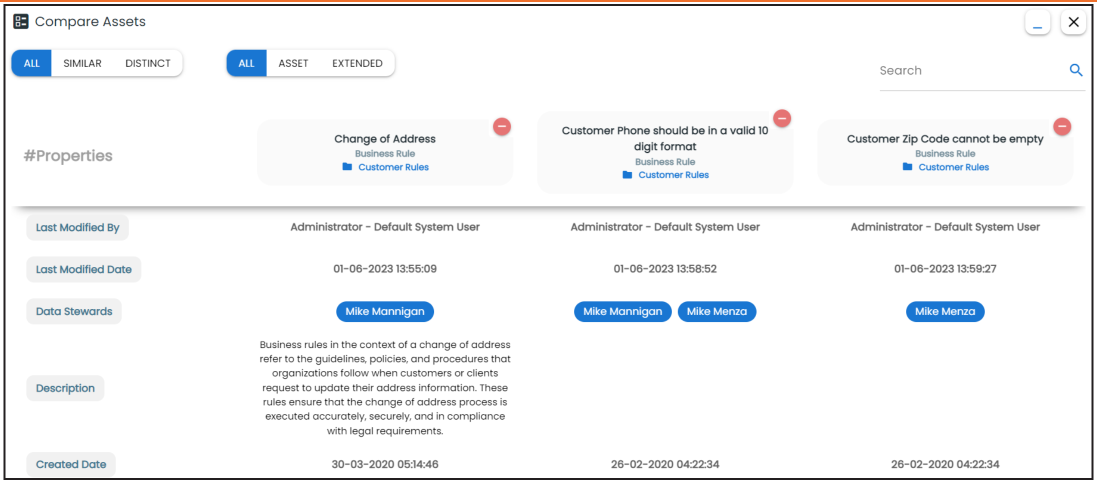
   You can click to remove assets from the list.

   Repeat this step to add more assets for comparison.

> You can select up to five assets for comparison.

3. Click **Compare**.

   The Compare Assets page appears and displays the side by side comparison of asset properties for the selected assets.



For more information about comparing assets based on properties, refer to the Comparing Business Assets topic.

Setting Up Associations for Business Rules

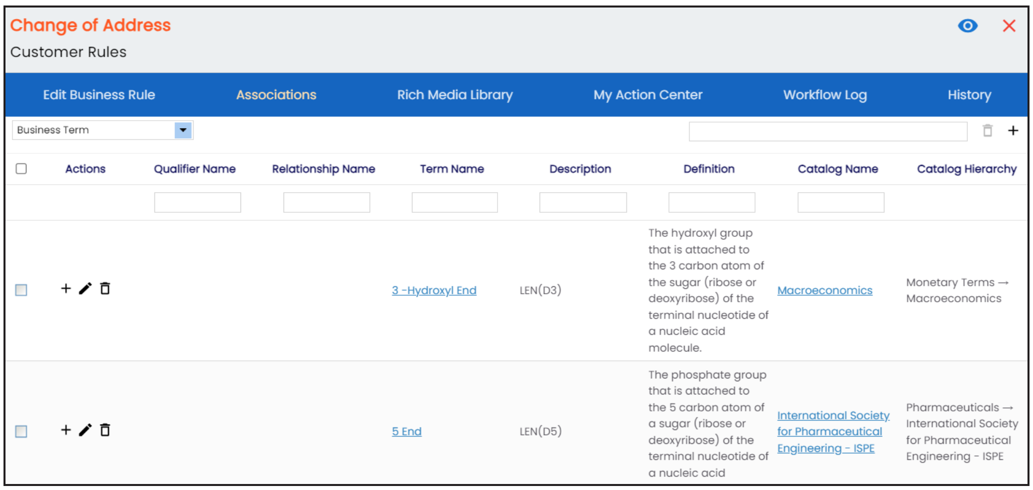
By default, you can associate business rules with business assets (business policies). You can control the asset types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

To set up associations for business rules, follow these steps:

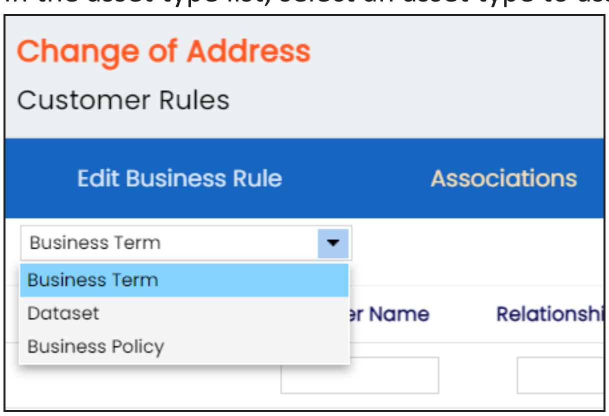
1. On the **Compact View** tab, click .

   Alternatively, on the **Grid View** tab, under the **Options** column, click . Then, click **Associations**.

   The Associations tab opens in edit mode.

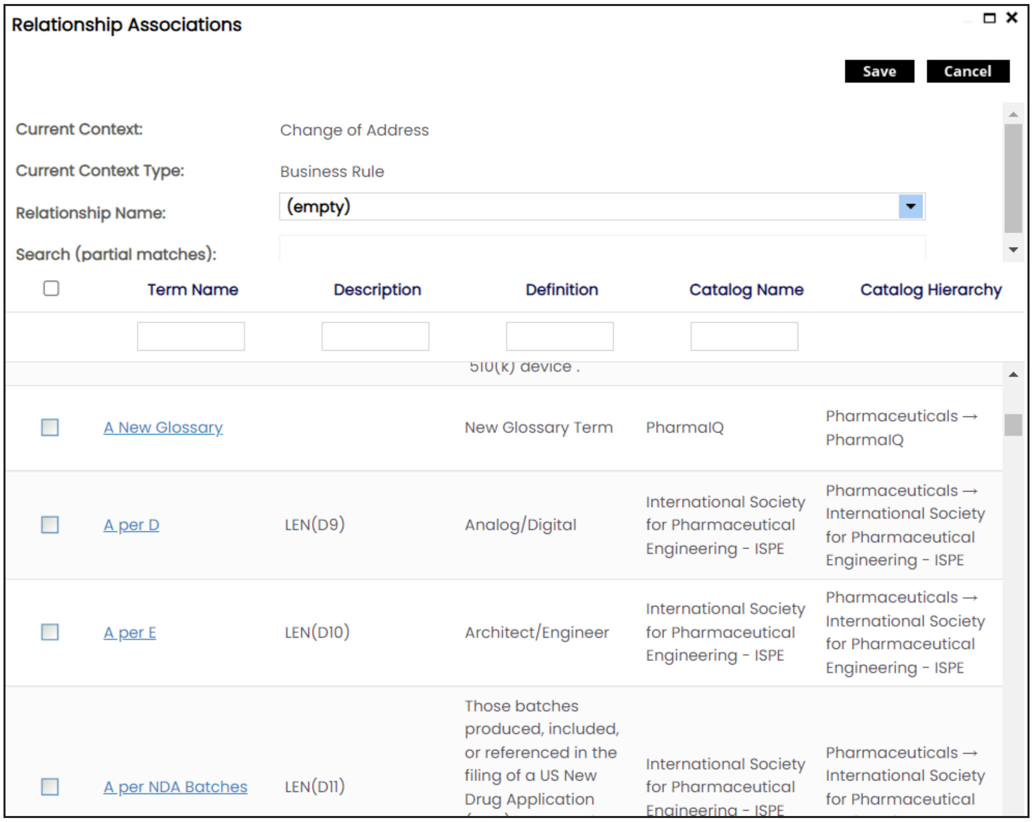


2. In the asset type list, select an asset type to associate with the business rule.



3. Click **+**.

   The Relationship Associations page appears. Based on the asset type that you select, it displays a list of available assets.



4. Select assets to associate with your business rule.

   If you know the asset name, use the Search (partial matches) field to look up for it.

5. Click **Save**.

   The selected objects are associated with the business rule and added to the list of associations.

   You can define as many associations as required.

You can associate multiple business assets with a business rule and view the associations based on a qualifier view in the mind map. For more information, refer to the topic Setting Up Associations using Qualifiers topic.

Adding Rich Media

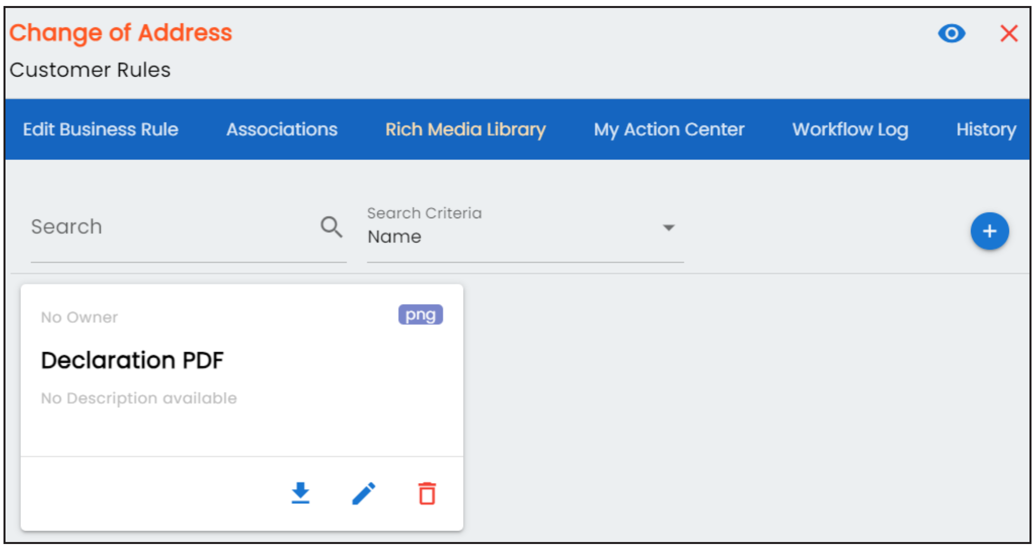
You can add supporting documents in the Word, Text, or PDF formats to a business rule.

To add documents to a business rule, follow these steps:

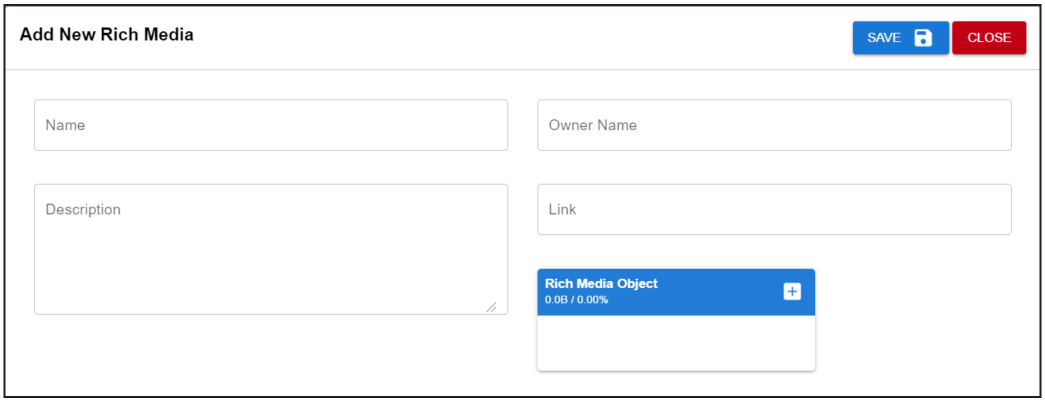
1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.
   The business rule opens in edit mode.

2. Click the **Rich Media Library** tab.



3. Click .
   The Add New Rich Media page appears.



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

Field Name	Description
Name	Specifies the name of the document being attached to the business rule. For example, Business Rule Details.
Description	Specifies a description of the rich media that is being added.
Owner Name	Specifies the document owner's name. For example, John Doe
Link	Specifies the URL of the rich media. For example, https://drive.google.com/file/l/2sC2_SZlyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Rich Media Object	Click the **Pick Files** button to choose and upload files from your computer.

5. Click **Save**.
   The selected document and its description are added to the business rule.

Viewing Workflow Logs

You can view the flow of actions of the workflow assigned to a business rule. Along with other information, the workflow log displays the current state of the business rule in the workflow.

To view the workflow log, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.
   The business rule opens in edit mode.

2. Click the **Workflow Log** tab.
   By default, it displays only the stages of the workflow and highlights the current stage. Use the following options to view more information:

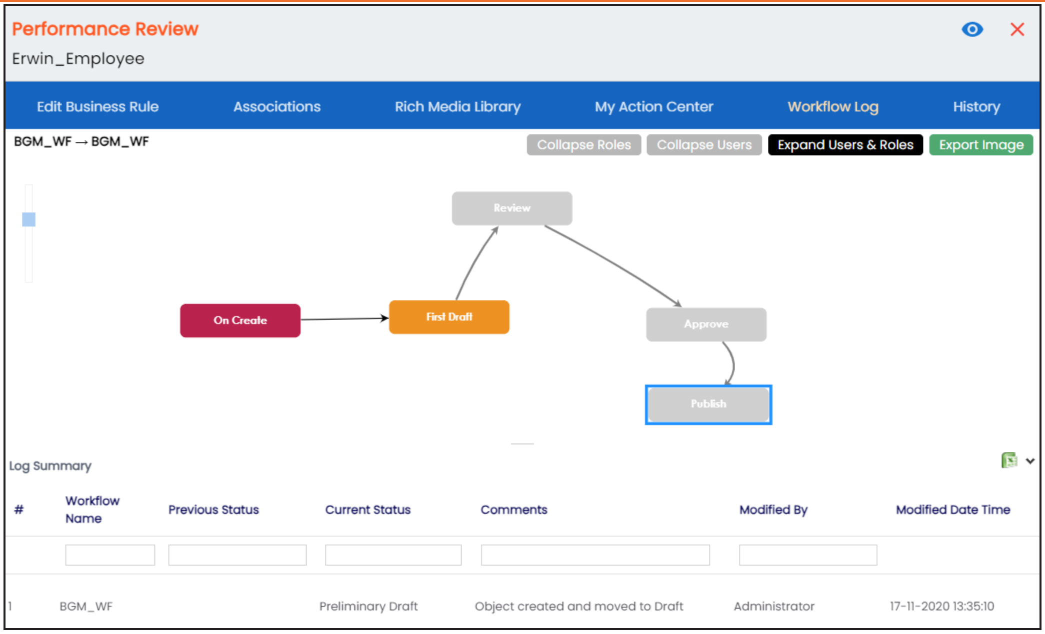
   Expand Users & Roles

   Use this option to display users and roles associated with each workflow stage. You can choose to hide users or roles using the Collapse Users and Collapse Roles options.

   Log Summary

   Use this pane to view the log of the actions performed.

Viewing Workflow Logs



You can export the workflow log summary in XLSX format. Click  to export the summary.

Viewing History

You can view and track a list of changes made to a business rule. The History tab displays change status, added records, and more.

To view the history of business rules, follow these steps:

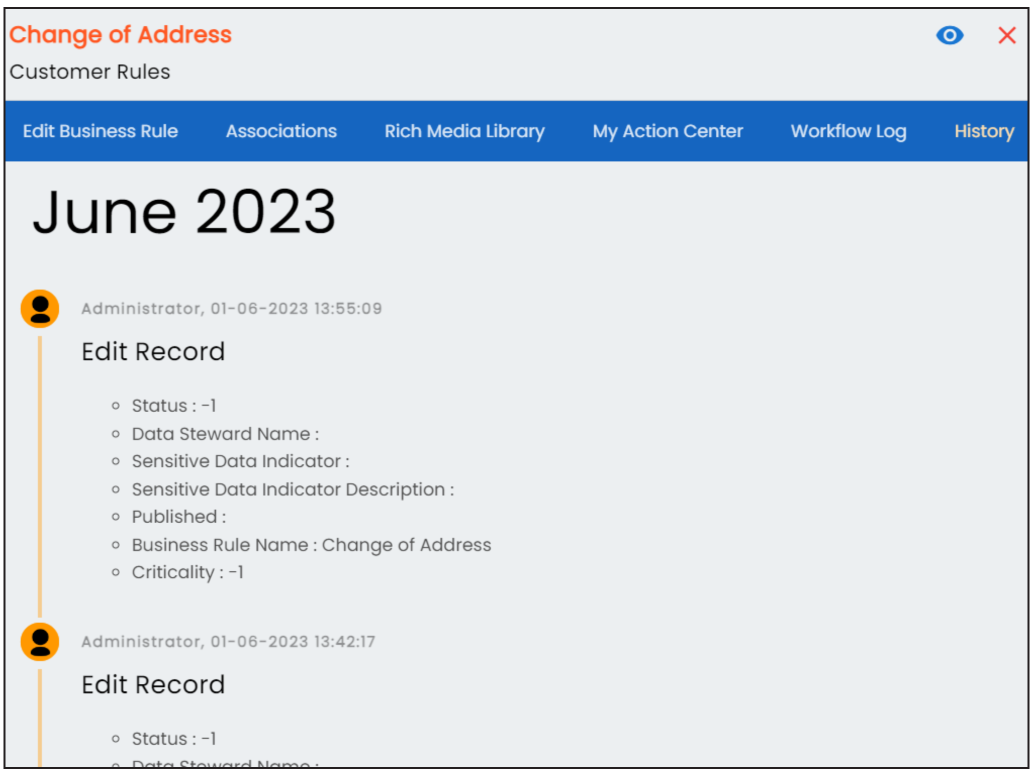
1. On the **Compact View** tab, click ⋮. Then, click ✎.

   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.

   The business rule opens in edit mode.

2. Click the **History** tab.

   From the History tab, you can view the change history related to a business rule.



Viewing Mind Maps

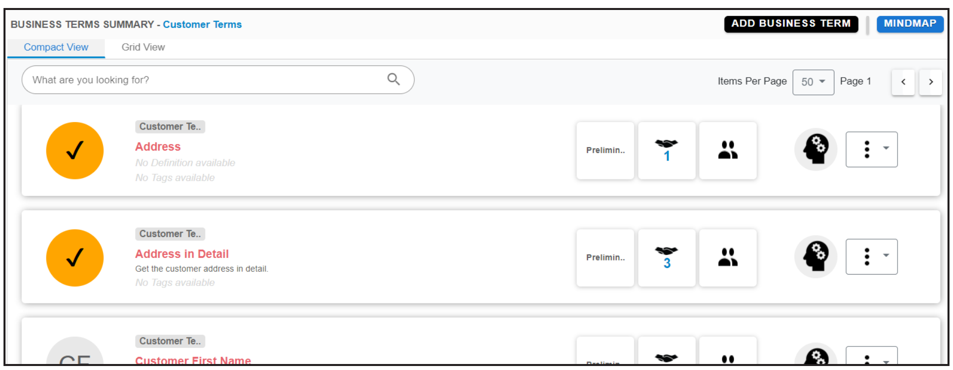
A mind map displays the pictorial representation of a business asset and its association with other business and technical assets. Technical assets refer to systems, environments, tables, and columns. Business assets refer to business terms, business policies, business rules, and other business assets as defined in the Business Glossary Manager Settings. You can also generate mind map for multiple business assets at the catalog level.

You can view and analyze Mind Maps in following views:

- Logical View
- Conceptual View

To view mind maps, follow these steps:

1. In the <Business_Asset> Summary section, do one of the following:
   - Select multiple business assets and click MINDMAP to view a mind map for the selected assets.

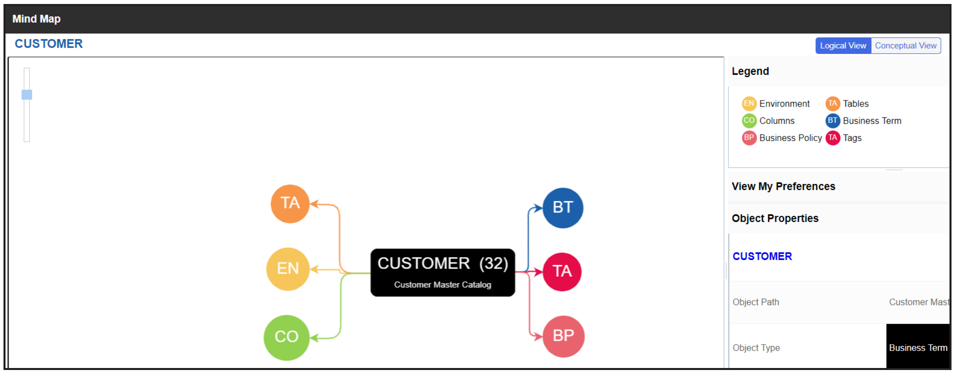


   - Click for an asset to view mind map for that asset alone.

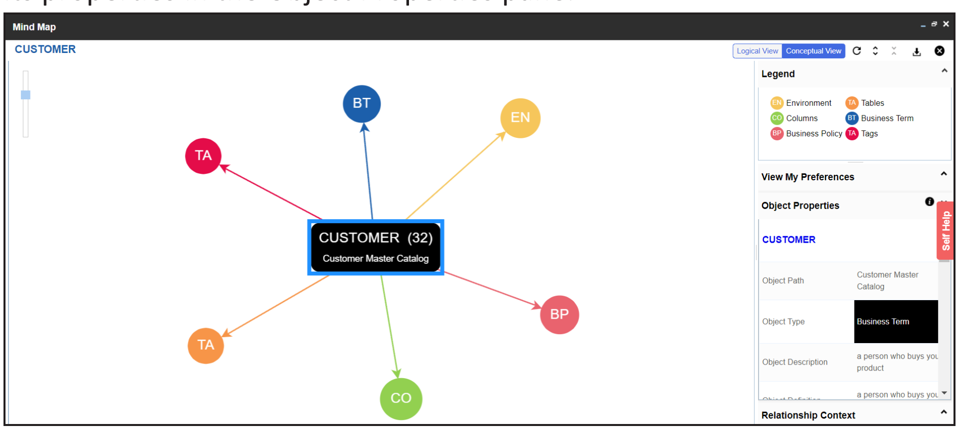
   The Mind Map page appears and the Logical View opens by default.

2. On the Mind Map page, you can click **Logical View** or **Conceptual View** to switch between them:

- **Logical View**: The logical view displays the associated technical assets on the left side and associated business assets on the right of the business asset. Selecting an asset on the mind map displays its properties in the Object Properties pane.



- **Conceptual View**: The conceptual view displays the associated technical assets in non-hierarchical representation. Selecting an asset on the mind map displays its properties in the Object Properties pane.



3. Use the following options to work on the mind map:

Reload Diagram ()

Use this option to reload the mind map to its default appearance.

Expand Diagram ( )

Use this option to expand the mind map to view the associated technical and business assets.

Reset Diagram to Original View ( )

Use this option to collapse the expanded nodes and restore the mind map to its original form.

Export ( )

Use this option to export the mind map. Hover over **Export** and use the following options:

Mind Map - Excel Report: Use this option to download the mind map in the .xlsx format. Ensure that you expand the mind map before downloading the report.

Mind Map - Image: Use this option to download the mind map as an image, in the .jpg format. Ensure that you expand the mind map before downloading the mind map image.

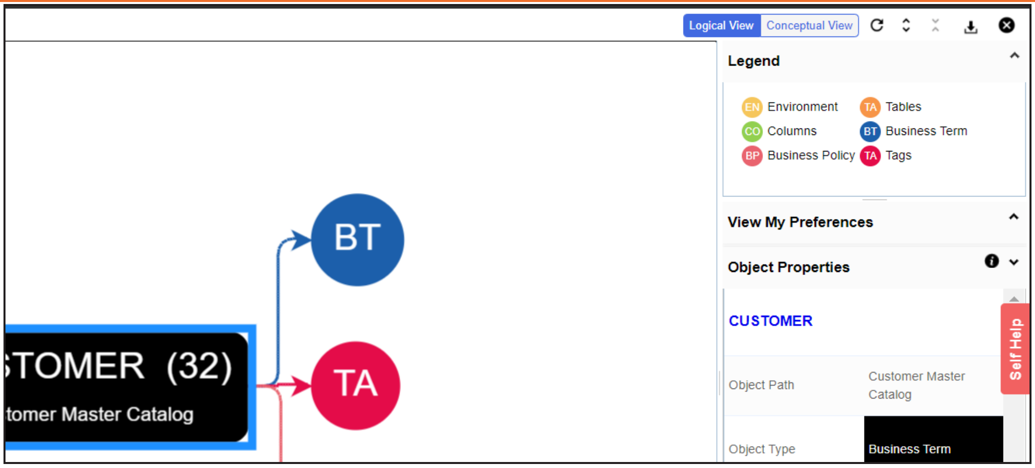
Sensitivity Details - Excel Report: Use this option to download the sensitivity report of all associated assets in the .xlsx format. This report includes sensitive data indicator (SDI), SDI classification, and SDI description of the associated assets.

You can use the following panes to view properties and configure preferences for the mind map:

- Legend
- View My Preferences
- Object Properties
- Overview

Legend

Use legends to identify objects on the mind map.



View My Preferences

You can set your preferences to view the mind map according to your requirements. The available settings differ based on the logical and conceptual view. Expand the **View My Preferences** pane and use the following options:

Assets

Use the **Include Assets without Associations** to display business assets with no associations.

> This option is only available when you generate mind maps for multiple assets at the same time.

Qualifier

Use the **Show Qualified View** to display business asset and its association with other business and technical assets that are created using a unique qualifier (business asset). For more information about creating associations using a qualifier, refer to the Setting Up Associations Using Qualifiers topic.

Asset Hierarchy

Use the following options to view asset hierarchy:

- **Gray Background**: Use this option to display gray colored background for the asset hierarchy nodes. For example, the following mind map displays nodes in the hierarchy with a gray-colored background.

> This option is only available for Logical View.

- **Show Asset Hierarchy/Show Hierarchy**: Use this option to view hierarchy of all the assets in a mind map.

Association Statistics

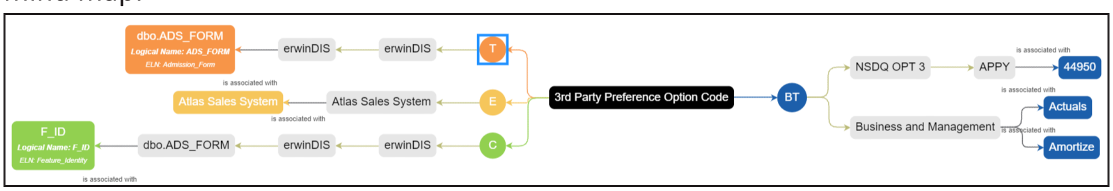
Use the **Show Counts** option to view the number of associations for a business asset.

Relationship Options

Use the following options to configure relationship options:

- **Include Relationships**: Use this option to display relationships between the assets on the mind map.
- **Switch to Enterprise Relationship configuration**: Use this option to apply the selected line color and type configured in the [Business Glossary Manager Settings](#).

  For example, in the following mind map, the relationship (is associated with) and the line color as set in Business Glossary Manager Settings appear on the mind map.



View Logical Names

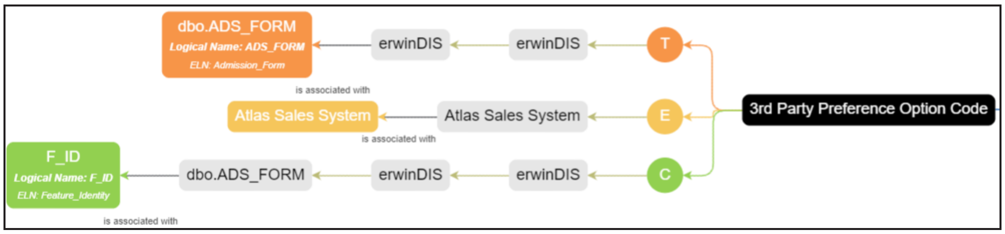
Use the following options to view logical and expanded logical names of tables and columns on the mind map:

- **Logical Names**: Use this option to view the logical names of tables and columns on the mind map.

- **Expanded Logical Names**: Use this option to view the expanded logical names of tables and columns on the mind map.

  You can configure logical names and expanded logical names of tables and columns in the Metadata Manager.

  For example, the following mind map displays logical names and expanded logical names.



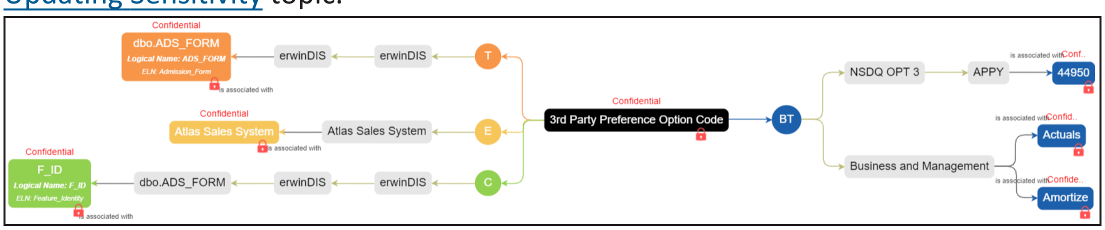
View Sensitivity

Use the following options to view sensitivity information of the assets on the mind map:

- **Sensitivity Data Indicator(Y/N)**: Use this option to indicate whether an asset is classified as sensitive.
- **Sensitive Data Classification**: Use this option to view the sensitivity classification of assets.

  For example, the following mind map displays the sensitive data indicator () for assets that are classified sensitive.

  For more information on updating asset sensitivity in mind maps, refer to the Updating Sensitivity topic.



Filters

Use the following filter options to select information availability on mind maps:

- **By Asset Type**: Use this option to filter and display required asset types on the mind map.
- **By Relationship**: Use this option to filter and display required assets on the mind map based on relationships.

  For example, in the By Asset Type list, select Column and in the By Relationship list select is associated with. Doing this displays only those columns that have the is associated type of relationship with the asset.

Object Properties

Expand the Object Properties pane to view the selected asset's information, such as its path, type, association statistics, data governance responsibilities, and sensitivity classification of an asset.

Overview

Expand this pane to open a panned view of the mind map. You can drag the purple box to move across the mind map and focus on specific areas.

Comparing Business Assets

You can compare business assets (business terms, business policies, and more) side by side to gain more insight and see asset property differences. You can also compare them based on similarity or distinct properties and more.

For example, the following steps walk you through comparing business terms. Similarly, you can compare other business assets in Business Glossary Manager.

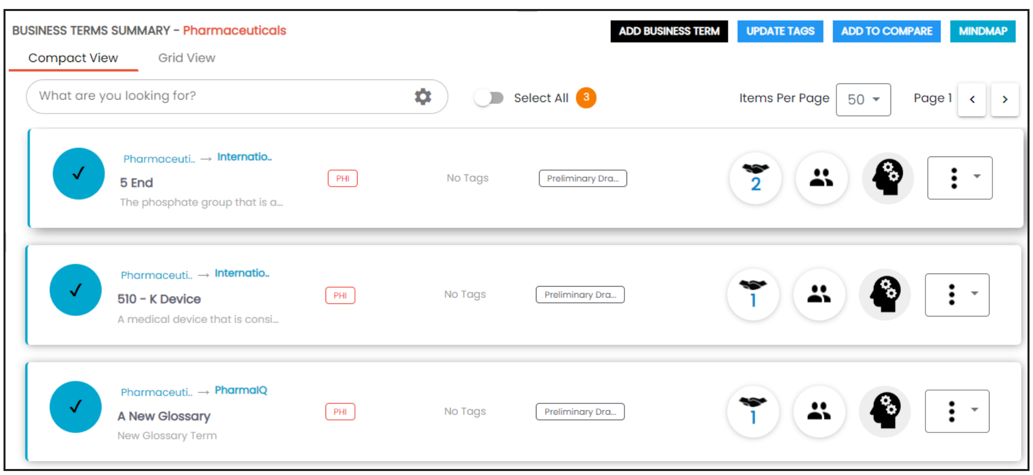
To compare business assets, follow these steps:

1. In the **Asset Workspace** pane, under the **Business Terms** node, click the required catalog.

   The business terms list appears in the Compact View tab.

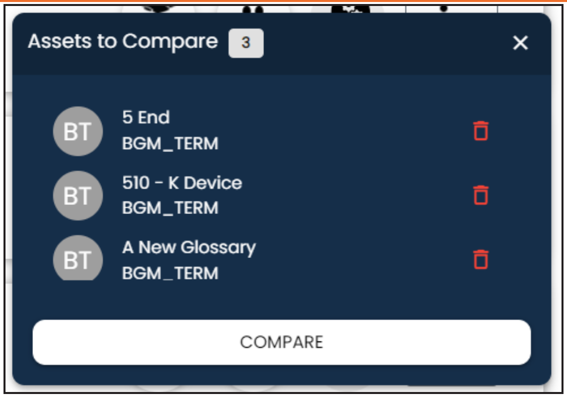
2. Select the required assets from the list.

   You can select up to five assets for comparison.

   Alternatively, you can also compare assets in the Grid View tab.

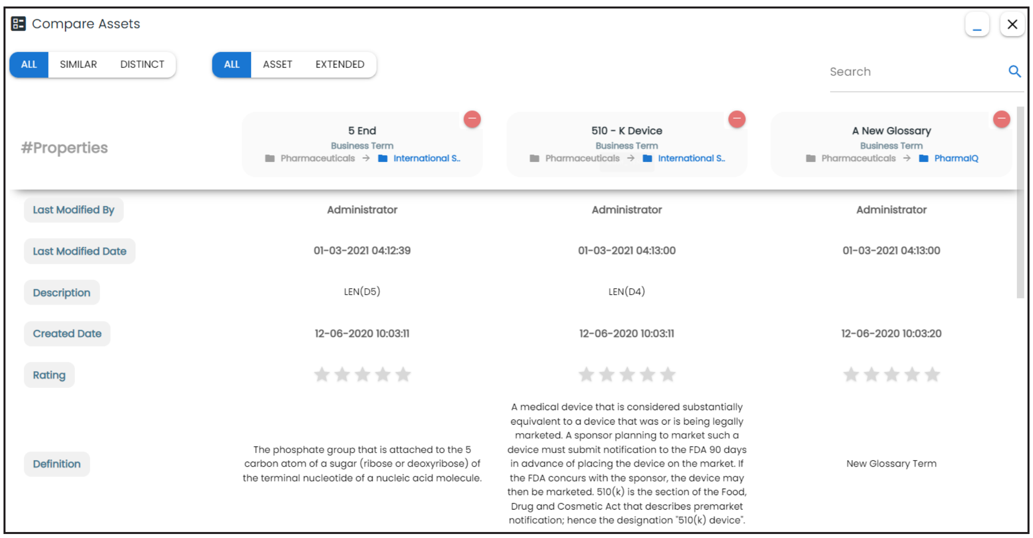
3. Click **Add to Compare**.
   The Asset to Compare sheet appears.



You can click to remove assets from the compare list.

4. Click **Compare**.

   The Compare Assets page appears and displays side by side comparison of asset properties for the selected assets.



   Also, use the Search box to search and compare specific properties of the assets in comparison.

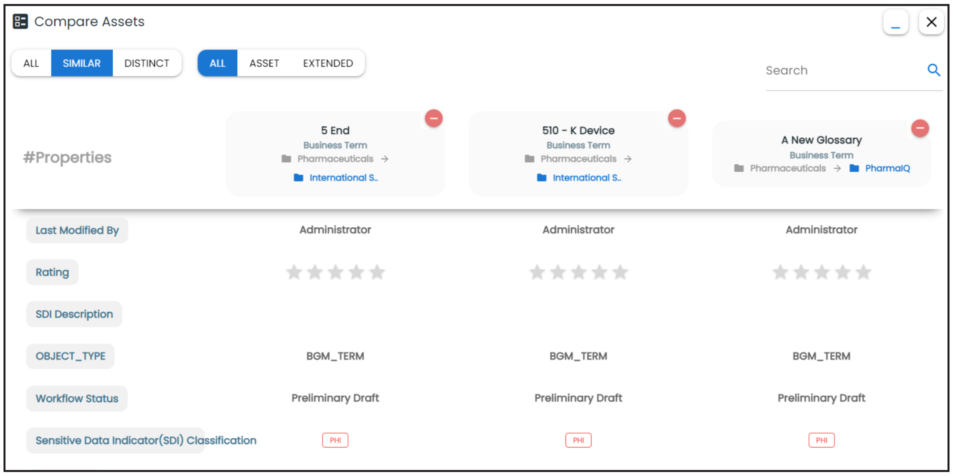
Use the following options to compare assets based on similar or distinct properties:

All

Use this option to view all asset properties for comparison.

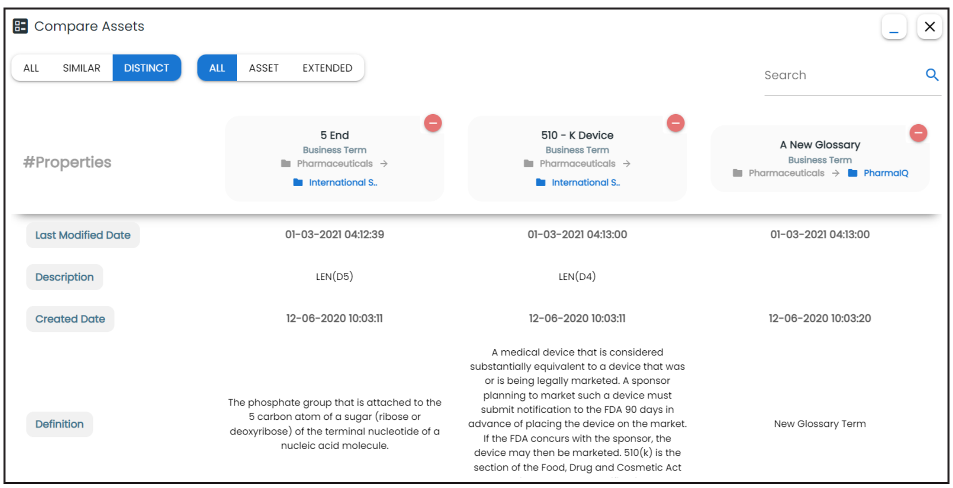
Similar

Use this option to view only the asset properties that are similar to the assets in comparison. For example, the following image displays properties that are similar to the assets.



Distinct

Use this option to view only the asset properties that are different from the assets in comparison. For example, the following image displays the properties that are different between the assets.



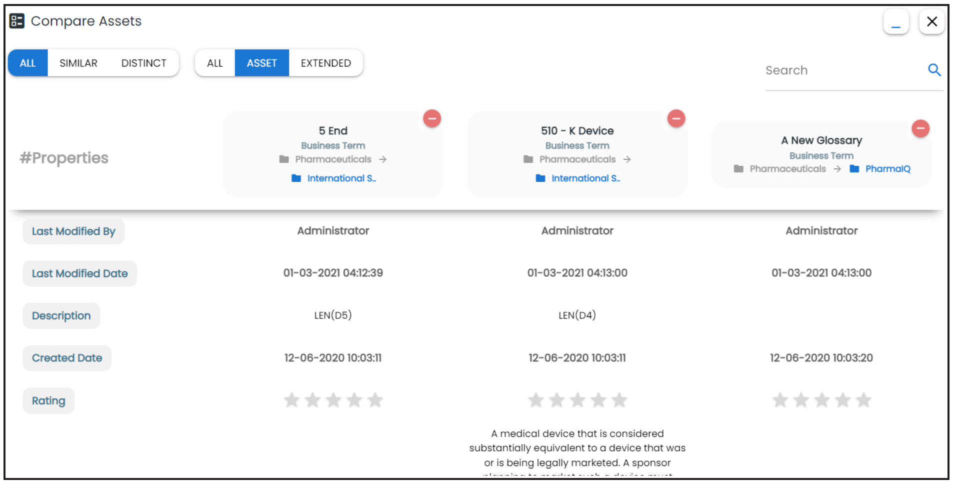
Use the following options to compare assets based on extended properties and asset details:

All

Use this option to view all asset properties for comparison.

Asset

Use this option to view only the asset properties of the assets in comparison. For example, the following image displays all the asset properties.



Extended

Use this option to view only the extended properties of the assets in comparison. For example, the following image displays the extended properties.

Moving Business Assets

You can move business assets from one catalog to another and preserve catalog hierarchy while moving them.

For example, to move business terms, follow these steps:

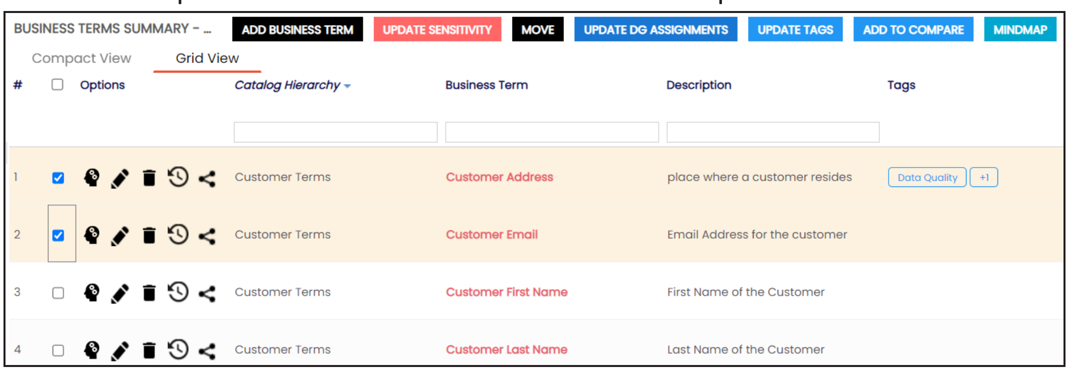
1. In the **Asset Workspace** pane, under the **Business Terms** node, click the required catalog.

   By default, assets appear in the Compact View.

2. Click the **Grid View** tab.

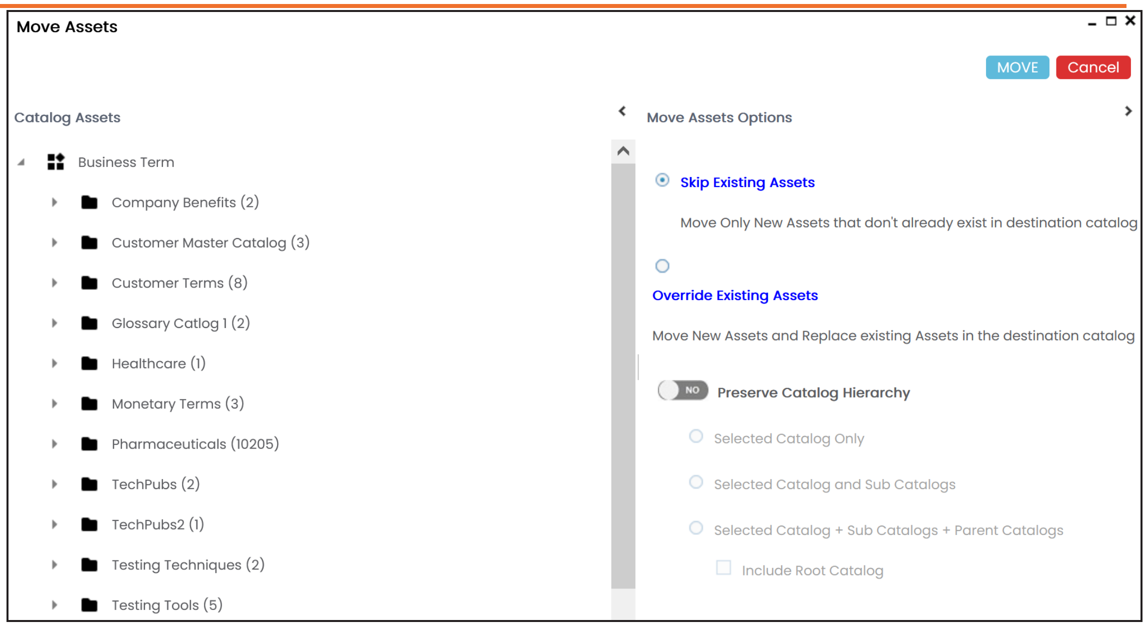
   The list of business terms in the catalog appears.

3. Select the required rows or use the check box at the top to select all rows.



4. Click **Move**.

   The Move Assets page appears.



5. In the **Catalog Assets** pane, select a destination catalog.
6. In the **Move Assets Options** pane, use the following options:

Field	Function
Skip Existing Assets	Use this option to move only those business terms that do not exist in the destination catalog.
Override Existing Assets	Use this option to move new business terms and replace any existing ones in the destination catalog.
Preserve Catalog Hierarchy	Switch **Preserve Catalog Hierarchy** to **Yes** to enable options for preserving catalog hierarchy. ▪ **Selected Catalog Only**: Use this option to move only the selected source catalog under the destination catalog. ▪ **Selected Catalog and Sub Catalogs**: Use this option to move the source catalog and its sub-catalogs under the destination catalog. ▪ **Selected Catalog + Sub Catalogs + Parent Catalogs**: Use this option to move the source catalog, its sub-catalogs, and parent catalogs under the destination catalog.

	▪ **Include Root Catalog**: This option is enabled only when you select the **Selected Catalog + Sub Catalogs + Parent Catalogs** option. Use this option to move the root catalog of the source catalog under the destination catalog.

7. Click **Move**.
   The business term is moved to the selected catalog.

Similarly, you can move other default and user-defined business assets from one catalog to another.

Setting Up Associations using Qualifiers

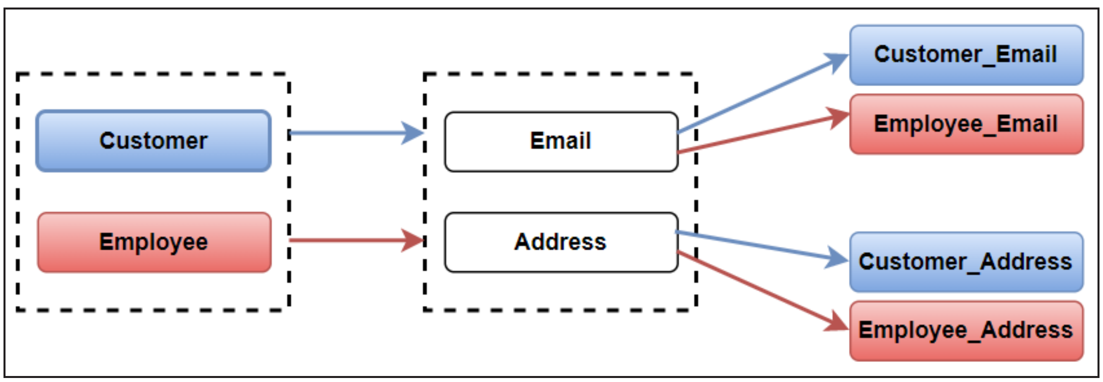
You can associate business assets based on a unique qualifier. A qualifier displays associations that are uniquely identified by a business asset in a mind map. You can also create multiple levels of associations that are unique for a business asset.

This topic walks you through the steps to create associations based on a unique qualifier for a Business Term using an example.

This example creates associations between business terms in two parts:

- Business terms, Customer and Employee are associated with respective assets, such as Email and Address.
- Business terms, Email, and Address are associated with relevant assets using Customer and Employee as qualifiers.

The following diagram shows how assets are associated.



In this diagram:

1. Customer information (customer's email and address) is associated with business term, Customer, using it as a qualifier.
2. Employee information (employee’s email and address) is associated with the business term, Employee, using it as a qualifier.

As a result, when you view mind map of either of the business terms (Customer or Employee) with the qualifier option enabled, only the associations related to Customer or

Employee are displayed. For more information on mind map, refer to the Viewing Mind Maps topic.

Similarly, you can set up associations for all the business and technical assets.

> For the qualifier option to function as intended, we recommend that you follow the example in this topic to set up associations.

To set up associations for business terms (Customer and Employee) using a qualifier, go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**. Then, set up associations as follows:

- Associating Customer as a Unique Qualifier
- Associating Employee as a Unique Qualifier

Associating Customer as a Unique Qualifier

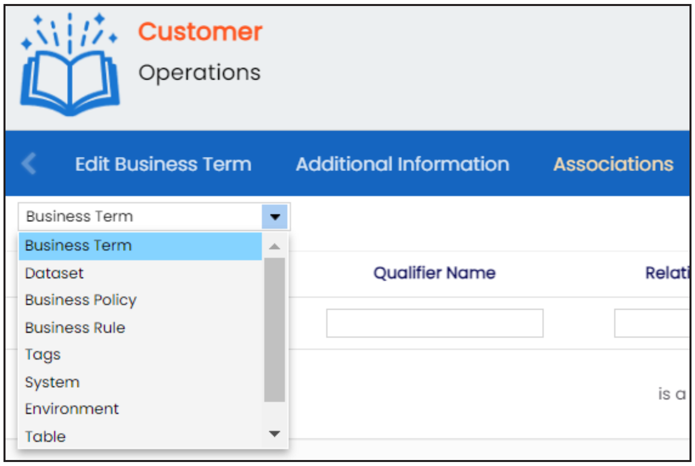
To define associations for Customer based on the diagram explained above, and use it as a unique qualifier for its associations, follow these steps:

1. On the **Compact View** tab, on customer card, click .

   Alternatively, on the **Grid View** tab, under the **Options** column, click . Then, click **Associations**.

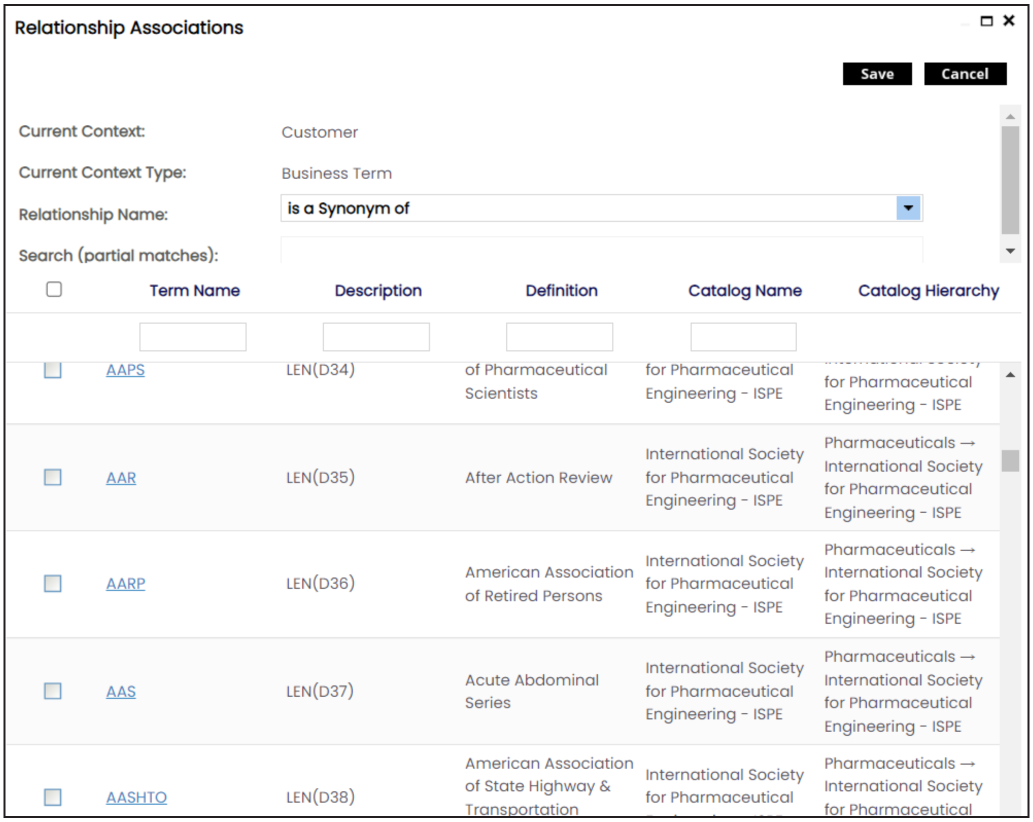
   The Associations tab opens in edit mode.

2. In the asset type (business policies, business terms, columns, environments, and tables) list, select Business Term to associate with the business term, Customer.



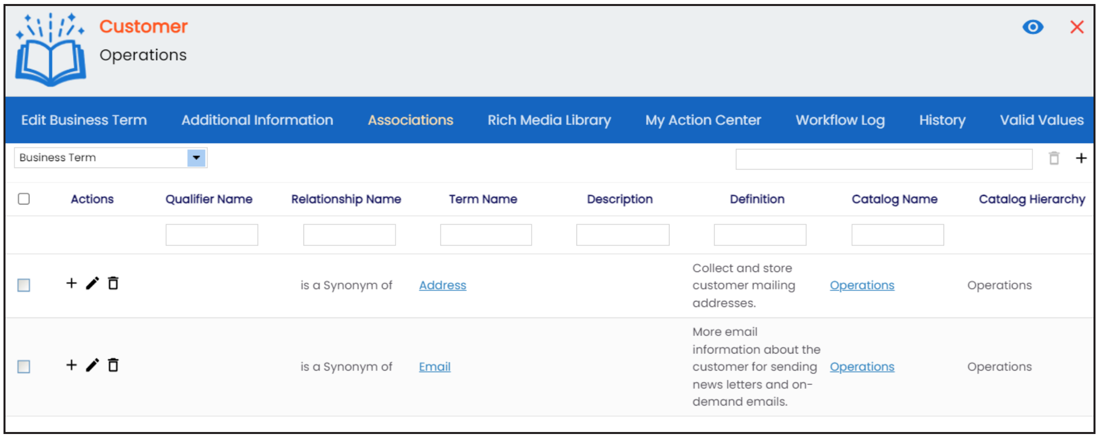
3. Click +.

The Relationship Associations page appears. Based on the asset type that you select, it displays a list of available assets.

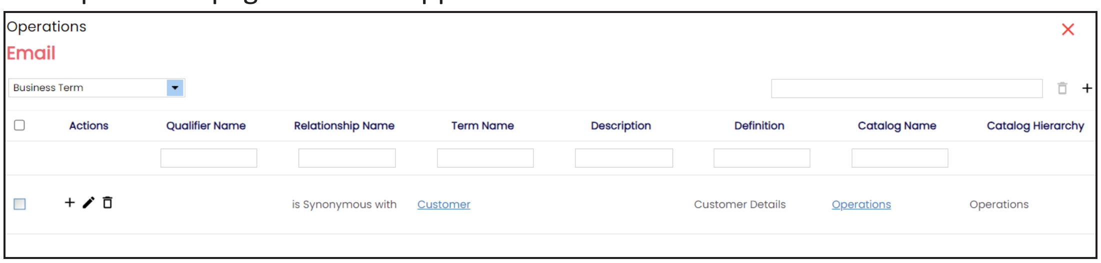


4. Select the assets, Email and Address, to associate with Customer.
   If you know the asset name, use the Search (partial matches) field to look up for it.
5. Click **Save**.
   Email and Address are associated with the Customer and added to its list of asso-

ciations.



6. For Email, under the **Actions** column, click + to associate it with other assets using Customer as a qualifier.
   The Operations page for Email appears.

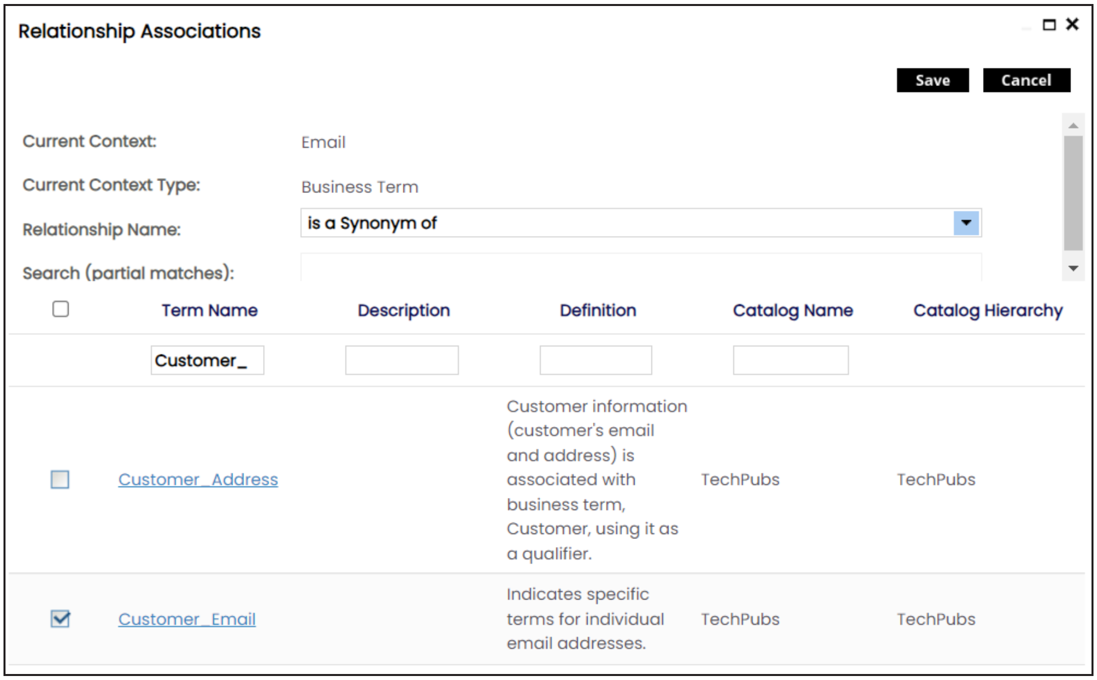


   On the relationship association page, select Business Term from the asset type list to associate with the business term Email using Customer as a qualifier.

7. In the asset type (business policies, business terms, columns, environments, and tables) list, select Business Term to associate with the business term Email using Customer as a qualifier.

8. Click + on the top-right corner.
   The Relationship Associations page appears.

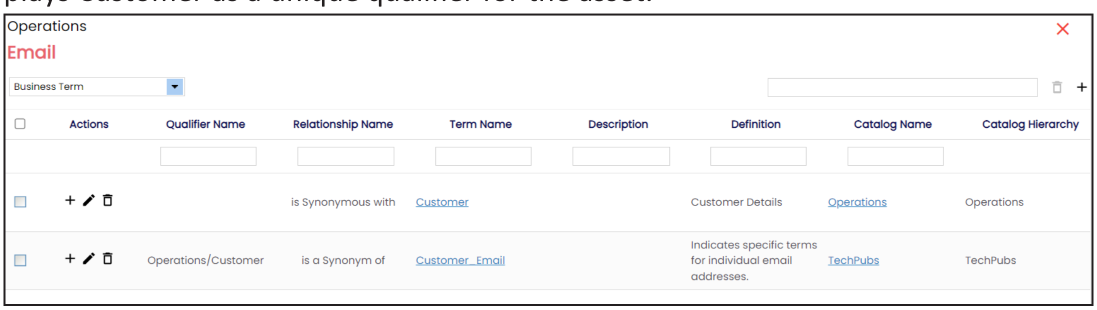
9. Select Customer_Email to associate with Email, using Customer as a qualifier.



10. Click **Save**.

    Customer_Email is associated with Email using Customer as a qualifier.

    Once the Customer_Email is associated with Email, the **Qualifier Name** column displays Customer as a unique qualifier for the asset.



11. Repeat steps 6 to 10 to associate Customer_Address with Address using Customer as a qualifier.

    Once the Customer_Address is associated with Address, the **Qualifier Name** column displays Customer as a unique qualifier for the asset.

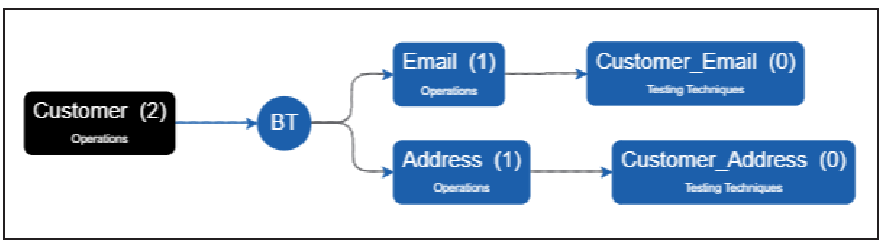
Associating Employee as a Unique Qualifier

Similarly, you can define associations for Employee based on the diagram explained above and use it as a unique qualifier for its associations. To create association based on the diagram, follow the steps in Association Customer Using a Qualifier section.

Once you have created associations, you can view them in mind map. Use the **Show Qualified View** option in the mind map to view the associations only based on a qualifier. In this case, Customer.

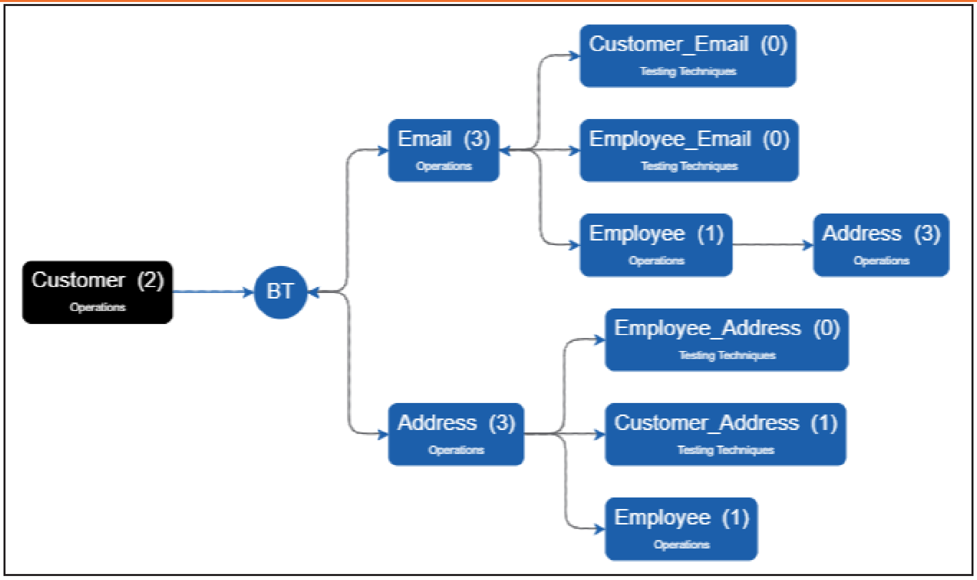
To view mind map, in Compact View, on the Customer card, click . Then, select the **Show Qualified View** option. Selecting this option displays only those associations that are based on the unique qualifier, Customer.

- **With Show Qualified View option**: View associations based on Customer as a qualifier.

  Similarly, you can view associations in a mind map using Employee as a qualifier.

- **Without Show Qualified View option**: View all associations.



Similarly, you can view associations in a mind map for the business term Employee.

Tagging Business Assets

You can tag business assets in bulk via:

- Compact View:
  Use this option when you want to tag business assets and their associated assets.
- Grid view:
  Use this option when you want to tag assets of an asset type.

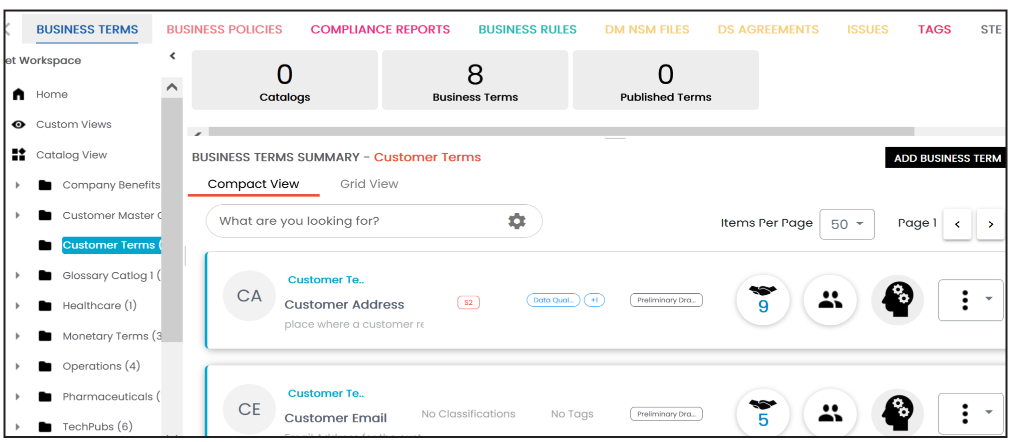
Tagging Business Assets-Compact View

On the Compact View tab, you can tag an asset and its associated assets in bulk. Associated assets are of two types, technical and business assets. Technical assets refer to columns, tables, environments, and systems. Business assets refer to business terms, business policies, business rules, and other business assets defined in the Business Glossary Manager Settings.

To tag business assets, follow these steps:

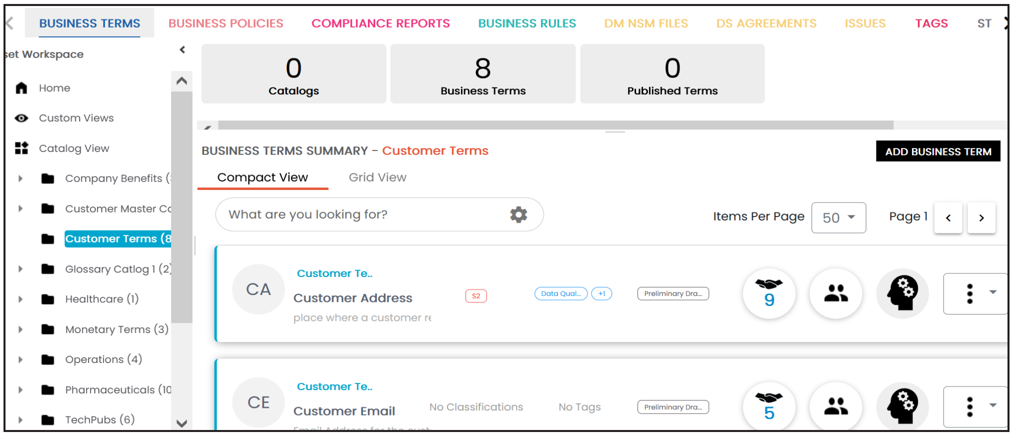
1. On the asset browser, click a <Business_Asset_Type>.

   The Asset Workspace switches to the business asset view. For example, if you click Business Terms on the asset browser, the Asset Workspace switches to the business terms view.

2. In the Asset Workspace, select the required catalog. For example, select Customer Terms.

   The Compact View tab displays business terms in the Customer Terms catalog.

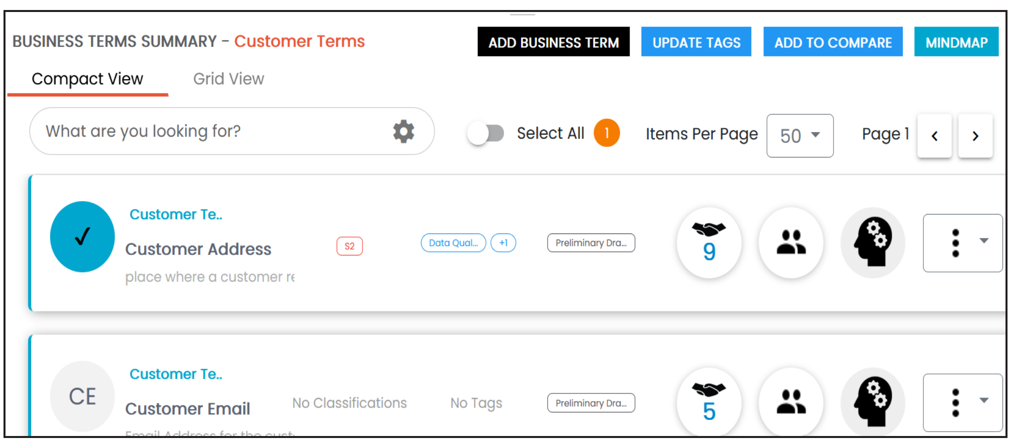


3. Select the required business asset.

   The Update Tags button is enabled.

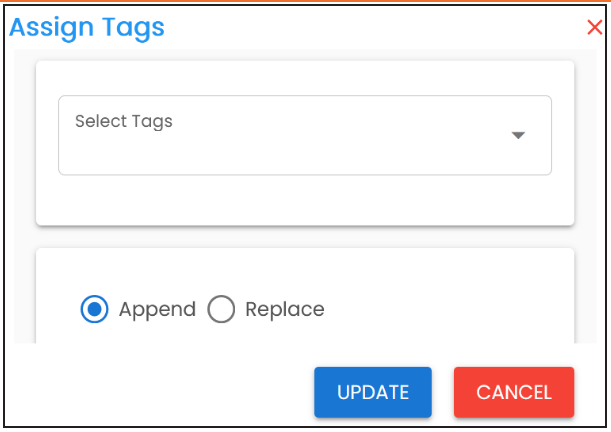
   For example, select Customer Address.

   To select all business terms, you can switch the **Select All** option to Yes.



4. Click **Update Tags**.

   The Assign Tags page appears.



5. Click **Select Tags** and select tags from the suggestions that appear.
   The list contains tags created in the Enterprise Tags module; based on the configured scope.

   > You can also create a tag by typing a tag name in the Select Tags box and then pressing Enter.

6. Use the following options:

   Append

   Use this option to add new tags to the existing list of tags.

   Replace

   Use this option to replace existing tags.

7. Click **Update**.

   The selected business assets and their associated assets are tagged.

Tagging Business Assets-Grid View

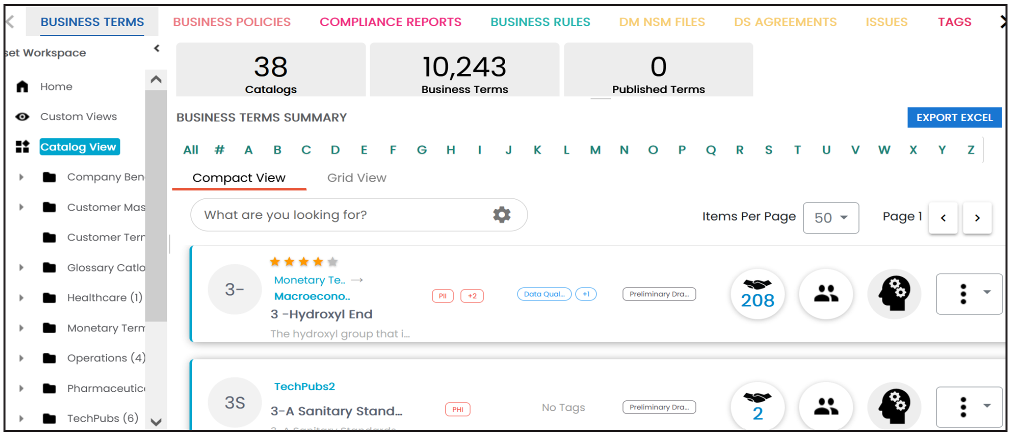
On the Grid View tab, You can tag business assets in bulk.

To tag business assets, follow these steps:

Tagging Business Assets

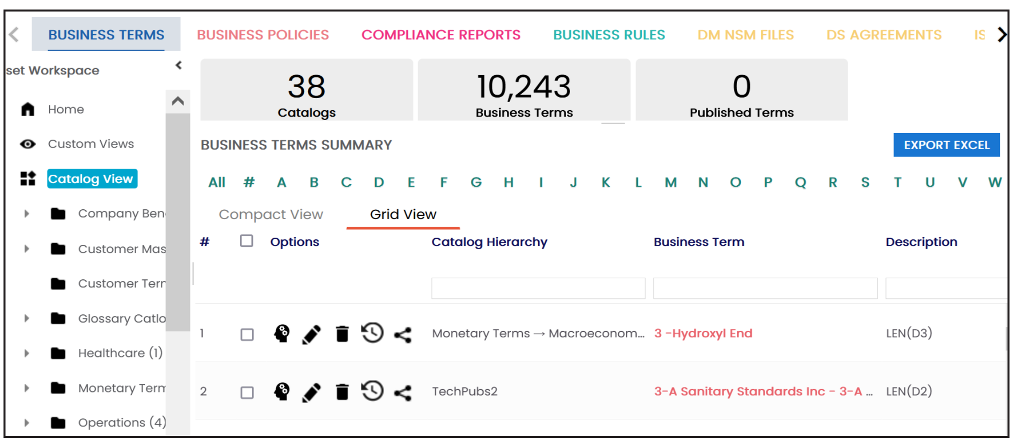
1. On the asset browser, click a <Business_Asset_Type>.

   The Asset Workspace switches to the business asset view. For example, if you click Business Terms on the asset browser, the Asset Workspace switches to the business terms view.

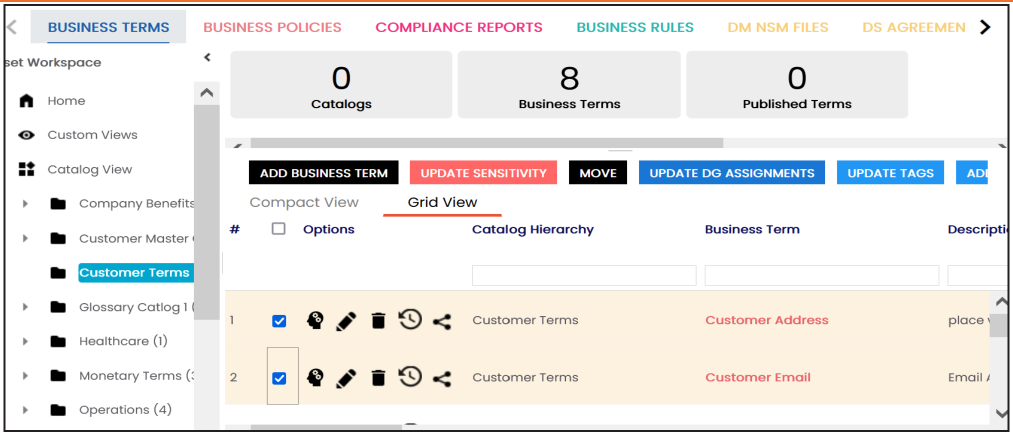
2. Under **<Business_Asset> Summary**, click the **Grid View** tab.

   The grid view for the business asset appears. For example, the following image shows the grid view for Business Terms.

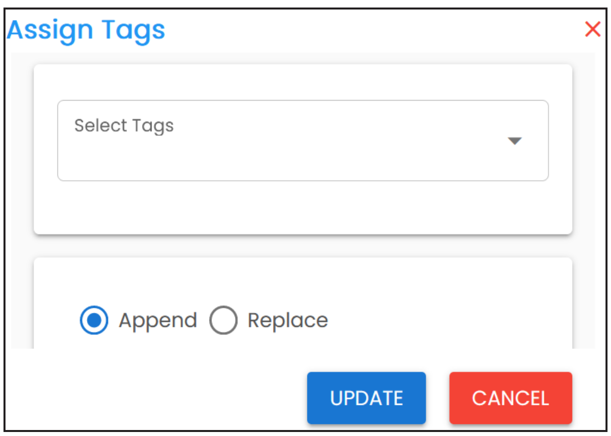
3. Select the required business asset.
   The Update Tags button is enabled.
   For example, select Customer Address.

   To select all the listed business asset, use the check box at the top of the grid.



4. Click **Update Tags**.

   The Assign Tags page appears.



5. Click **Select Tags** and select tags from the suggestions that appear.
   The list contains tags created in the Enterprise Tags module; based on the configured scope.

> You can also create a tag by typing a tag name in the Select Tags box and then pressing Enter.

6. Use the following options:

   Append

   Use this option to add tags to the existing list of tags.

Replace

Use this option to replace existing tags.

7. Click **Update**.

   The selected business assets and their associated assets are tagged.

Updating Sensitivity in Bulk

Updating sensitivity involves marking business assets sensitive with an appropriate sensitive data indicator classification. Although you can set up sensitivity of a business asset while creating it, you can also update sensitivity of assets in bulk using:

- Mind map:
  Use this option when you want to update sensitivity of associated business and technical assets.
- Grid view:
  Use this option when you want to update sensitivity of an asset type.

Before updating sensitivity of business assets, ensure that you enable sensitivity for the asset type. For more information on enabling sensitivity for an asset type, refer to the Configuring Asset Details topic.

You can configure the email notifications to be sent whenever sensitivity is updated in bulk. For more information on configuring the notification, refer to the Configuring Sensitivity Update Notifications topic.

Updating Sensitivity-Mind Map

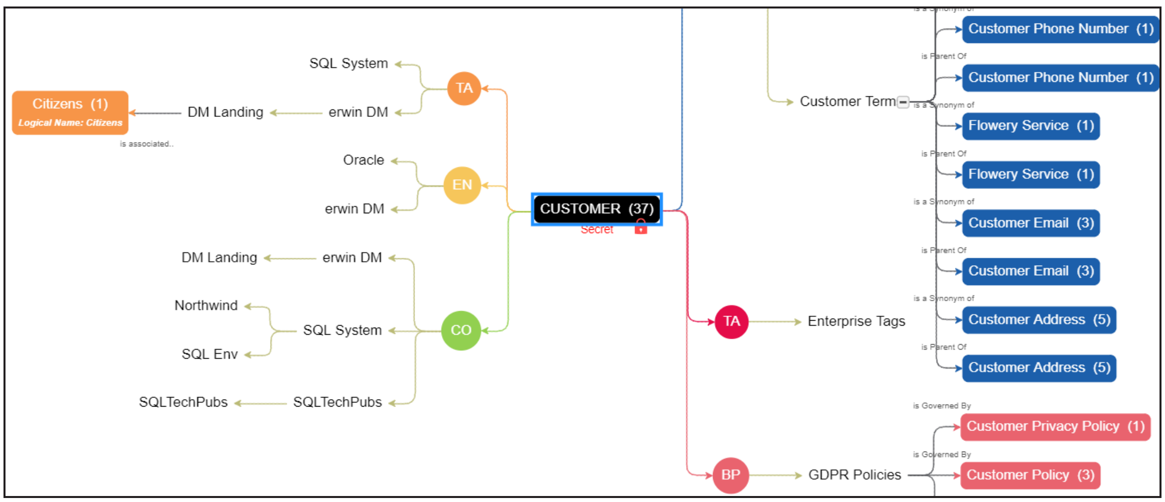
You can update sensitivity of an asset and its associated assets in bulk through a mind map. Associated assets are of two types, technical and business assets. Technical assets refer to columns, tables, environments, and systems. Business assets refer to business terms, business policies, business rules, and other business assets defined in the Business Glossary Manager Settings.

Selected Assets

To update sensitivity of an asset, follow these steps:

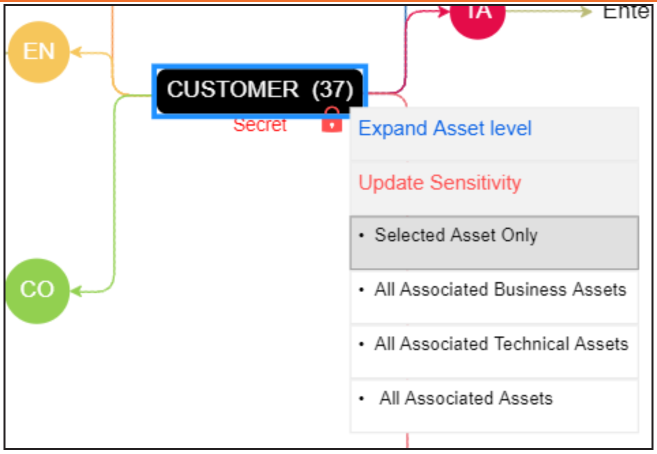
1. On the mind map, click to expand diagram.

   The mind map appears in its expanded form.



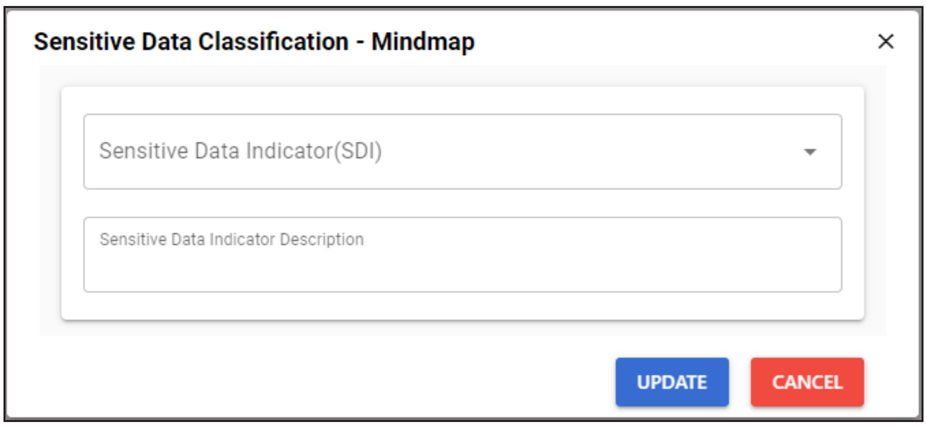
2. Right-click the required asset.

   The options available for the asset appear.



3. Click **Selected Asset Only**.

   The Sensitive Data Classification - Mindmap page appears.



4. In the drop-down list, select sensitivity data indicator (SDI) classification. You can add multiple classifications to the asset type.
5. In the **Sensitive Data Indicator Description** field, enter comments or description of the sensitivity indicator.
6. Click **Update**.

   The sensitivity of the assets is updated based on the options you selected.

Associated Assets

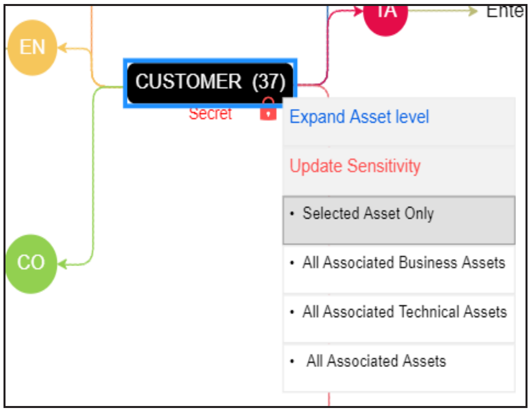
You can update sensitivity of associated assets in bulk through a mind map.

Updating Sensitivity-Mind Map

To update sensitivity of associated assets through mind maps, follow these steps:

1. On the mind map, right-click the required asset.

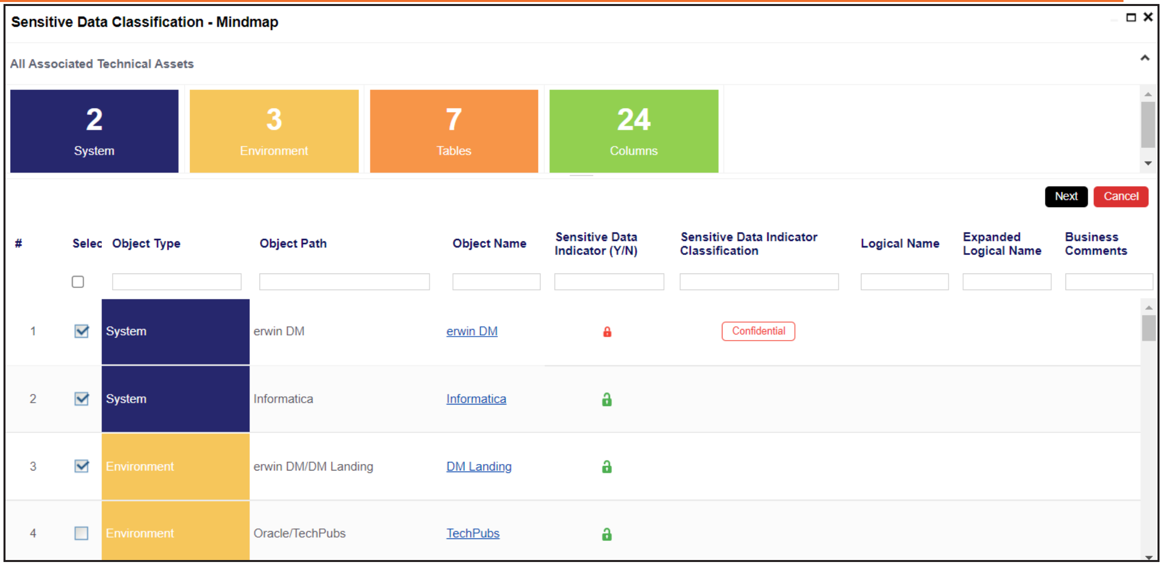
   The options available for the asset appear.

2. Click any one of the following:

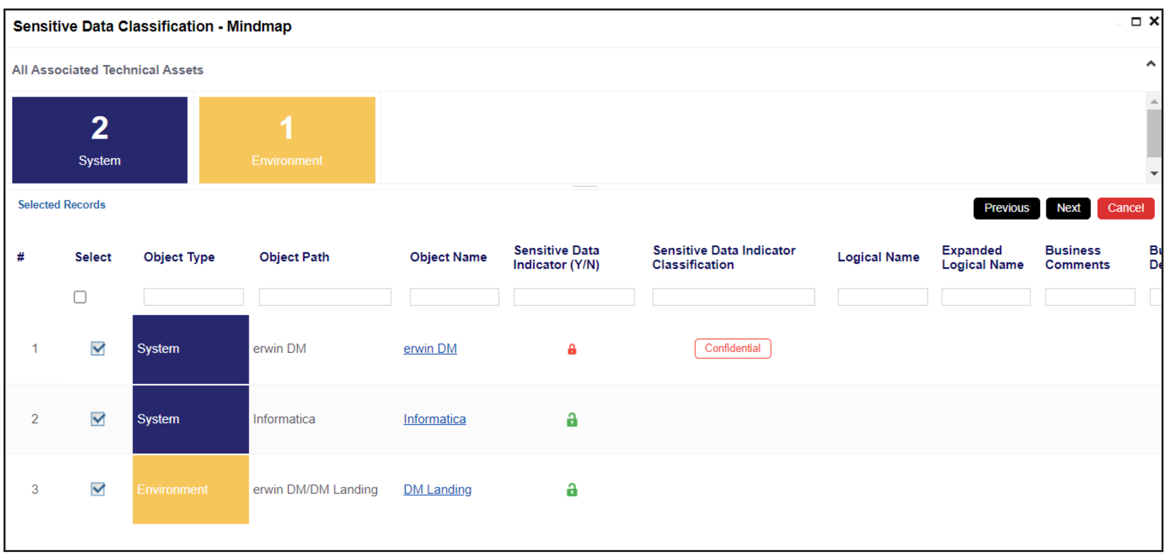
   - **All Associated Business Assets**: Use this option to update sensitivity of associated business assets.
   - **All Associated Technical Assets**: Use this option to update sensitivity of associated technical assets.
   - **All Associated Assets**: Use this option to update sensitivity of associated business and technical assets.

   For example, if you click All Associated Technical Assets, a list of all associated technical assets appear.



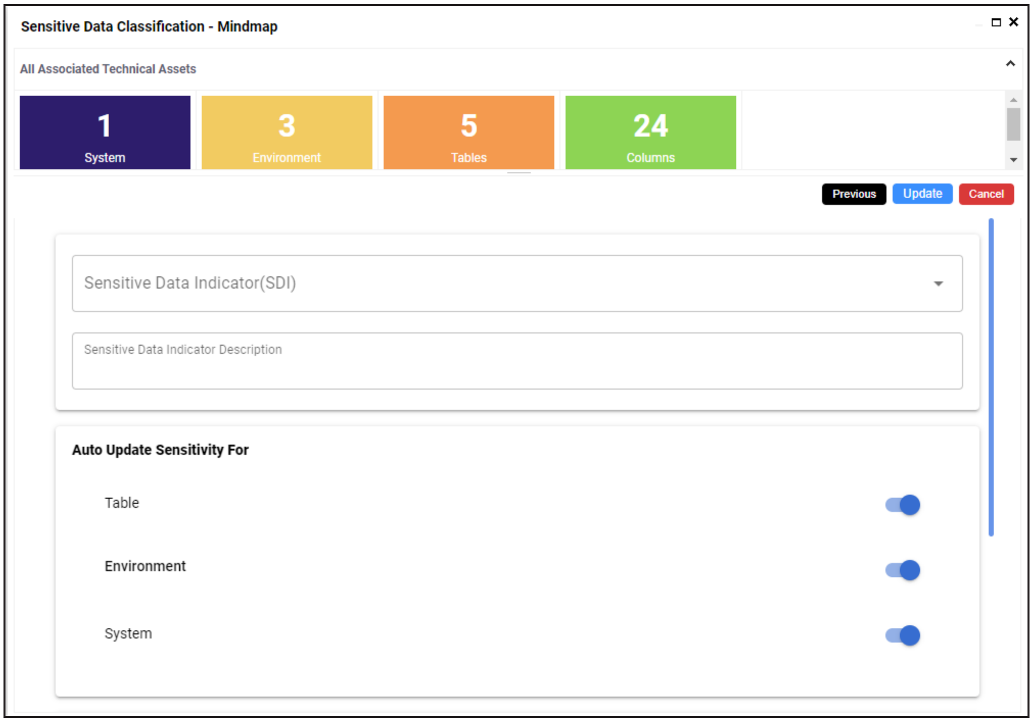
3. Select the required assets and click **Next**.

   The Selected Records page appears. You can verify the selected assets and clear the check box if required.



4. Click **Next**.

The Auto Update Sensitivity For section does not appear for business assets.



5. Enter or select appropriate values in the fields. Refer to the table below for field descriptions.

Field Name	Description
Sensitive Data Indicator (SDI)	Specifies the SDI classification of the selected asset. Also, you can add multiple classifications to the selected columns. For example, PII. For more information on configuring SDI classifications, refer to the Configuring Sensitivity Classifications topic.
Sensitive Data Indicator Description	Specifies the description of the SDI classification. For example, This classification indicates that the data contains personal identifiable information. Use this for data such as, address or social security number.

Field Name	Description
Auto Update Sensitivity For	Specifies whether sensitivity is applicable to: ▪ System: Switch the **System** option on to apply sensitivity to all the systems containing the assets. ▪ Environment: Switch the **Environment** option on to apply sensitivity to all the environments containing the assets. ▪ Table: Switch the **Table** option on to apply sensitivity to the tables containing the assets.
Asset Update Options	Specifies whether sensitivity is applicable to: ▪ **Unclassified Only**: Click Unclassified Only to apply sensitivity to assets that are not marked sensitive. ▪ **All Classified Only**: Click All Classified Only to apply sensitivity to assets that are marked sensitive. ▪ **All Classified And Unclassified**: Click All Classified And Unclassified to apply sensitivity to both the types of assets, sensitive or not sensitive.

6. Click **Update**.

   The sensitivity of the assets is updated based on the options you selected.

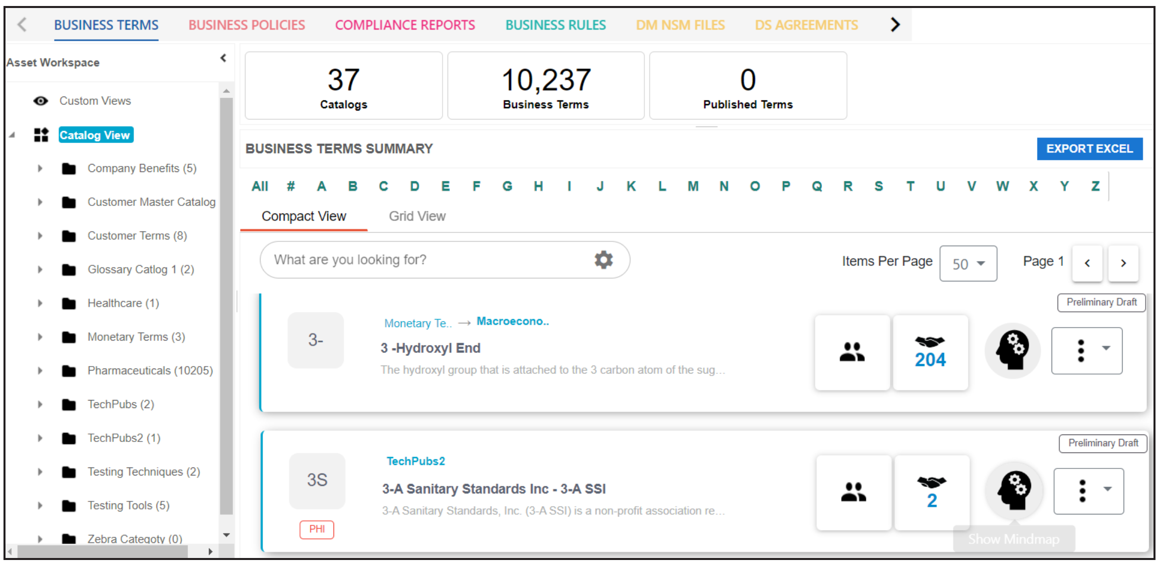
Updating Sensitivity-Grid View

You can view a list of business assets under the Compact View and Grid View tab. On the Grid View tab, you can update sensitivity of business assets in bulk.

To update sensitivity of business assets, follow these steps:

1. In the Business Asset List, click a <Business_Asset_Name>.

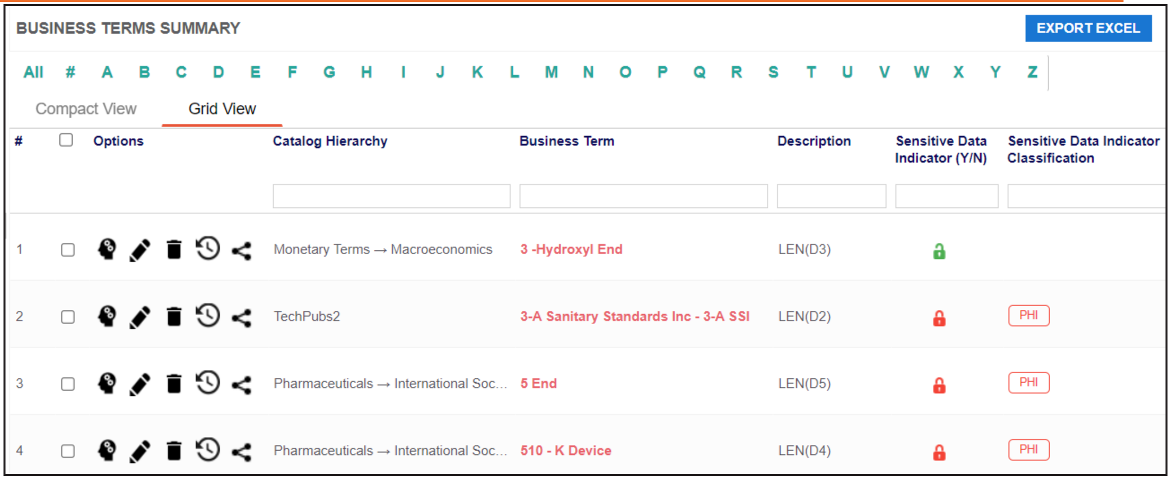
   The Asset Workspace switches to the business assets view. For example, if you click Business Terms in the business asset list, the Asset Workspace switches to the business terms view.



2. Under **<Business_Asset> Summary**, click the **Grid View** tab.

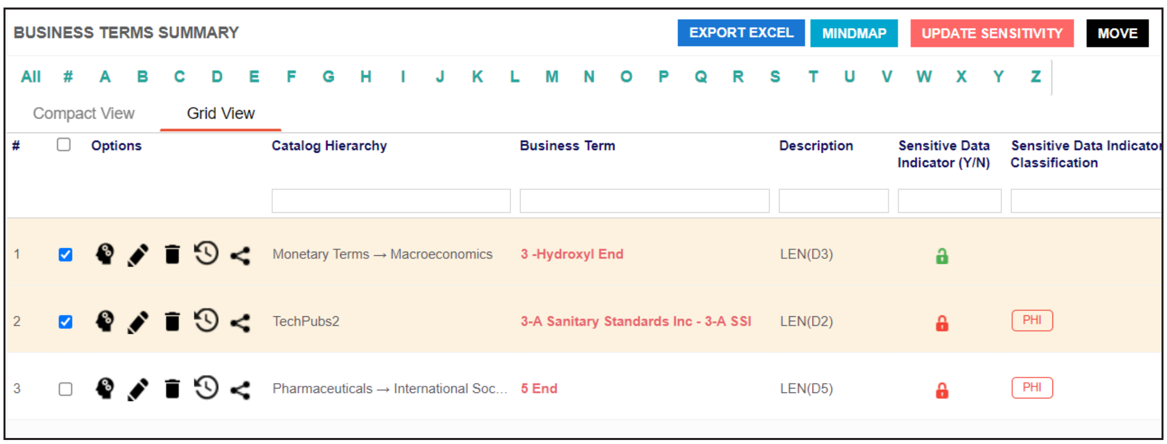
   The grid view for the business asset appears. For example, the image given below shows the grid view for Business Terms.

Updating Sensitivity-Grid View



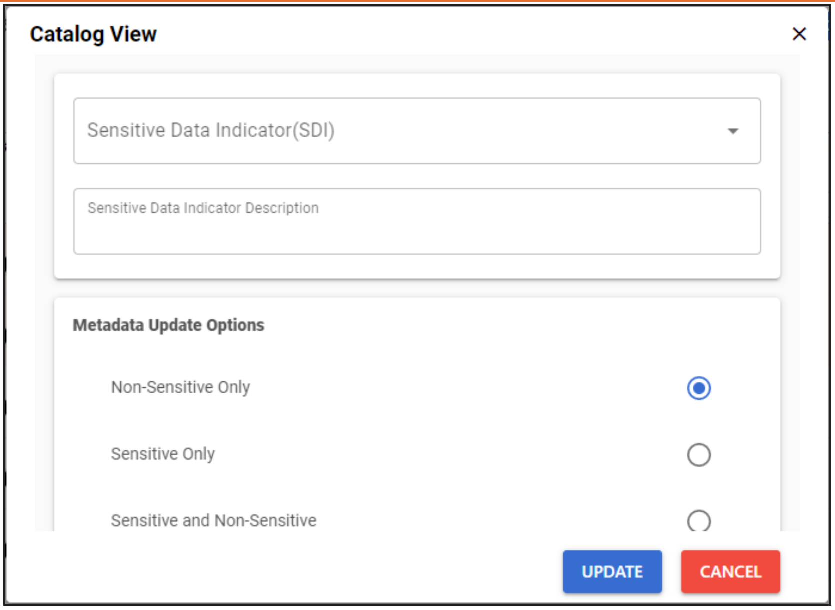
3. Select the required business assets.

   You can use the check box at the top to select all the business assets.



4. Click **Update Sensitivity**.

   The <Business Term> update page appears.



5. Enter or select appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Sensitivity Data Indicator (SDI)	Specifies the sensitivity data indicator (SDI) classification of the selected assets. Also, you can add multiple classifications to the selected columns. For example, PHI. For more information on configuring SDI classifications, refer to the Configuring Sensitivity Classifications topic.
Sensitivity Data Indicator Description	Specifies the description of the SDI classification. For example, This classification indicates that the data contains personal identifiable information. Use this for data such as, address or social security number.
Metadata Update Options	Specifies whether sensitivity applies to: ▪ **Unclassified Only**: Use this option to apply sensitivity to assets that are not marked sensitive. ▪ **All Classified Only**: Use this option to apply sensitivity to assets

Field Name	Description
	that are marked sensitive. ▪ **All Classified And Unclassified**: Use this option to apply sensitivity to both the types of assets, sensitive or not sensitive.

6. Click **Update**.

   Sensitivity of the selected business assets is updated.

Importing Compliance Reports

erwin Data Intelligence's Compliance Report Starter Kit comes with predefined report sets, which generate compliance reports periodically and send out email notifications to the recipients once reports are generated.

You can view your imported compliance reports in the Discover Assets module. To view compliance reports, go to **Application Menu** > **Discover Assets** > **Compliance Report**. For more information on compliance reports, refer to the Viewing Compliance Reports topic.

This topic walks you through importing the compliance report starter kit into the Business Glossary Manager. Importing compliance reports involves the following:

- Configuring Compliance Report Starter Kit
- Importing Compliance Reports

Configuring Compliance Reports Starter Kit

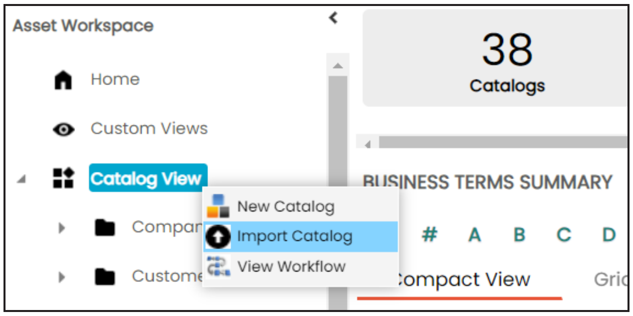
To configure the compliance reports starter kit, follow these steps:

1. Download the Compliance Reports Starter Kit here.
2. Open the starter kit.
   You can find the .XLSX starter kit file with the following file name format: Compliance_Reports_Starter_Kit_<version number>.xlsx.
   For example, Compliance_Reports_Starter_Kit_V2.1.xlsx.
3. Press Ctrl+H.
   The Find and Replace dialog box appears.
4. Find and replace all the instances of *https://ServerName:PortNumber/erwinDISuite* with the erwin DI URL of your organization.
   For example, if your server is Quest, you can replace *https://ServerName:PortNumber/erwinDISuite* with *https://quest01:8080/erwinDISuite*.
5. Save the file.

Importing Compliance Reports

To import the compliance reports, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**.
2. Go to the **Compliance Reports** tab.
   The workspace switches to the Compliance Reports Summary view.
3. In the **Asset Workspace** pane, right-click **Catalog View**.



4. Click **Import Catalog**.
   The Import Business Catalog page appears.

5. Click **Choose File**. Then, browse and select the Compliance_Reports_Starter_Kit.xlsx file that you configured in the Configuring Compliance Report Starter Kit step.
6. Click .
   Compliance reports are imported into your business glossary.

Once compliance reports are imported, you can view and manage them on the Compliance Report Summary page in Business Glossary Manager. Managing compliance reports involves:

- Enabling reports
- Adding email recipients
- Setting report generation interval
- Setting threshold value

Managing Compliance Reports

Managing compliance reports involves:

- Enabling a report
- Adding email recipients
- Setting report generation interval
- Setting a threshold value

To manage compliance reports, follow these steps:

1. On the **Compact View** tab, open a report, and click .
   Alternatively, on the **Grid View** tab, click under the **Options** column for a report.
2. Use the following options to manage the reports:

   Enable

   Use this option to mark the report active. Once the report is enabled, email notifications are sent periodically to the recipients.

   Email Recipients

   Use this option to add email recipients to the report. Email notifications are sent to the recipients once the report is generated. You can add multiple email recipients, each separated by a semicolon (;).

   Frequency

   Use this option to specify a time interval for report generation. Based on the configured frequency, reports are generated, and email notifications are sent to the recipients.

   Threshold

   Use this option to specify a threshold for report generation.

   > This option is not configurable for some reports, indicated by the value NA.

3. Click .
   Once reports are generated, you can view them in the Discover Assets module.

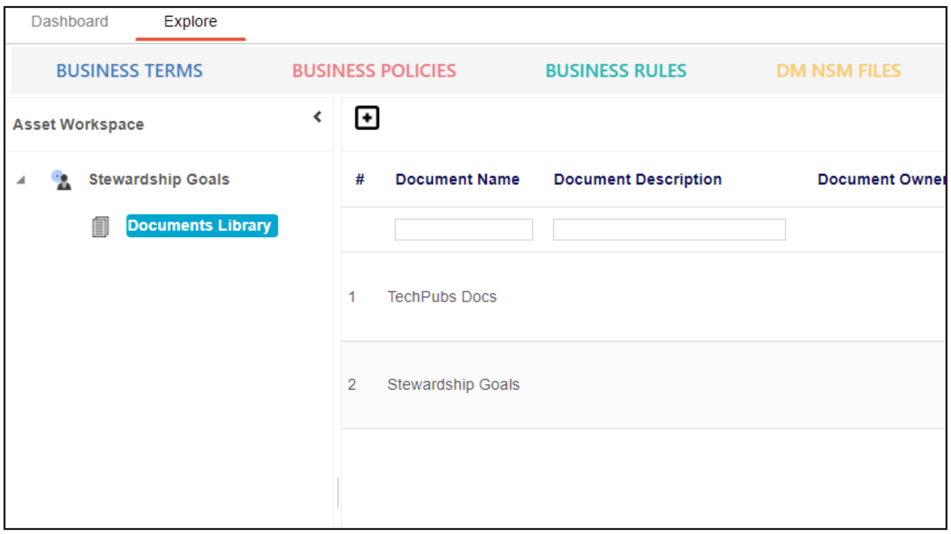
To view compliance reports, go to **Application Menu** > **Discover Assets** > **Compliance Reports**. For more information on compliance reports, refer to the Viewing Compliance Reports topic.

Setting Up Stewardship Goals

Data stewards initiate and facilitate collaboration to use organization's data to its capability. They protect data from misuse and are also responsible for ethical data management. Stewardship goals help data stewards to collaborate and protect data better.

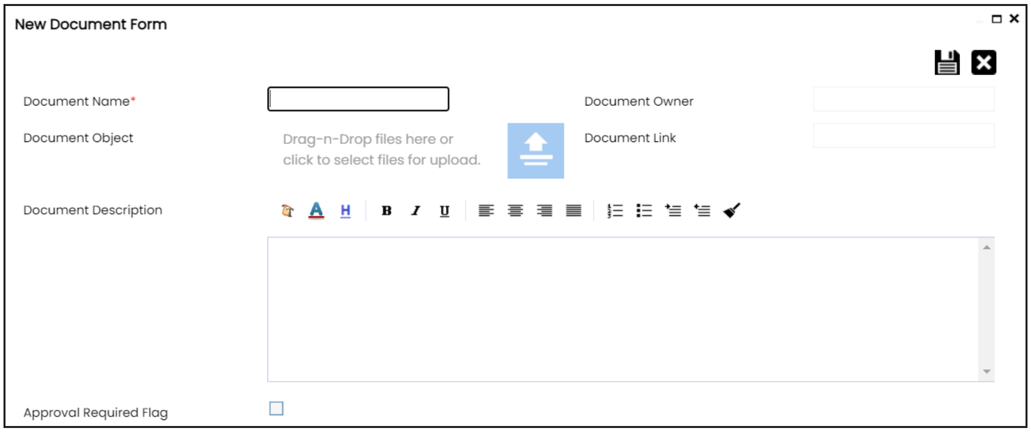
To set up stewardship goals, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**.
2. Go to the **Stewardship Goals** tab.
   The Asset Workspace switches to the stewardship goals view.
3. In the **Asset Workspace** pane, click **Stewardship Goals** > **Documents Library**.



4. Click .

   The New Document Form page appears.



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

Field Name	Description
Document Name	Specifies the name of the stewardship goals document. For example, ABCL Goal Details.
Document Object	Drag and drop document files or use to select and upload document files.
Document Owner	Specifies the document owner's name. For example, John Doe.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Document Description	Specifies the intended use of the document. For example: The document is to keep a record of system description and its data dictionary.
Approval Required Flag	Specifies whether the document requires approval. Select the **Approval Required Flag** check box to select the document status.
Document	Specifies the status of the document.

Field Name	Description
Status	For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

6. Click .

   The selected stewardship goals document and its description are added to the stewardship goals set.

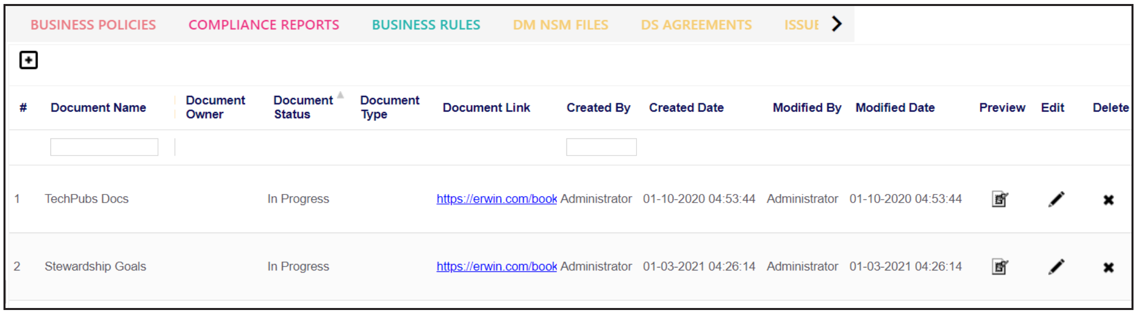
Once a stewardship goals document is set up, you can manage it using the options available for each goal document. Managing stewardship goals document involves viewing, editing, and deleting it.

Managing Stewardship Goals

Managing stewardship goals document involves viewing, editing, and deleting it.

To manage stewardship goals document, follow these steps:

1. Go to the list of documents in your Documents Library.



2. Scroll to the right of the list to access and use the following options:

Preview

Use this option to view the stewardship goals document within the Business Glossary Manager in the preview mode.

Edit

Use this option to update document properties, such as owner, link, description, approval requirement, and status.

Delete

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

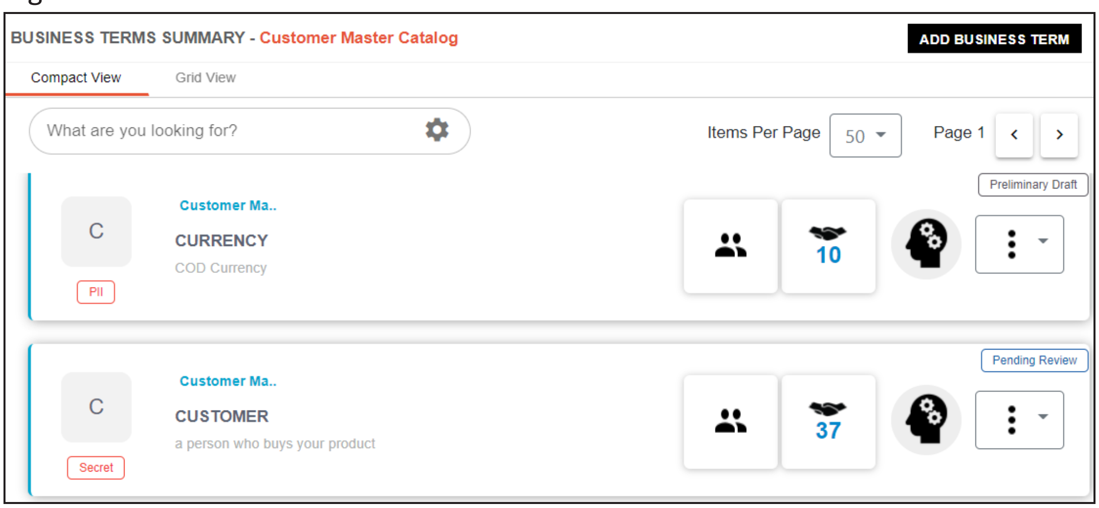
Updating Data Governance Assignments

You can update data governance and assign governance responsibilities for business assets to users. The user-list appears as pick list values based on the roles group. Ensure that you assign appropriate roles and users to the catalog containing the business assets.

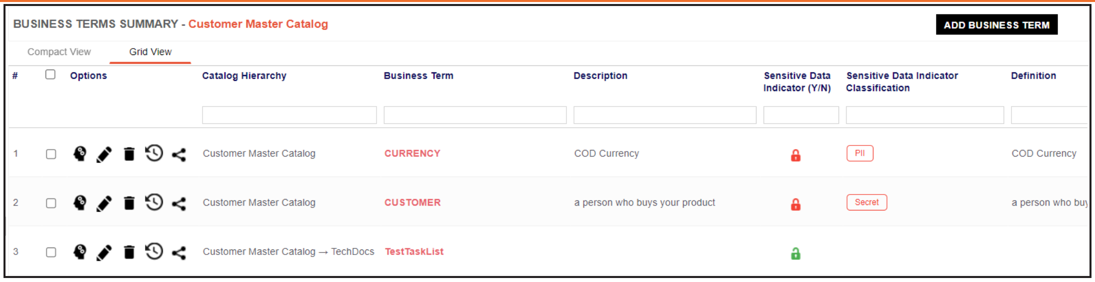
To update data governance assignments, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore**.
2. Go to the business asset tab. By default, the **Business Terms** is selected.
   The Asset Workspace displays a list of catalogs corresponding to the asset. For example, if you go to Business Rules tab, the Asset Workspace switches to the Business Rules Summary.
3. In the **Asset Workspace** pane, click a catalog.

   By default, the Compact View tab appears. It displays the business assets in the catalog.

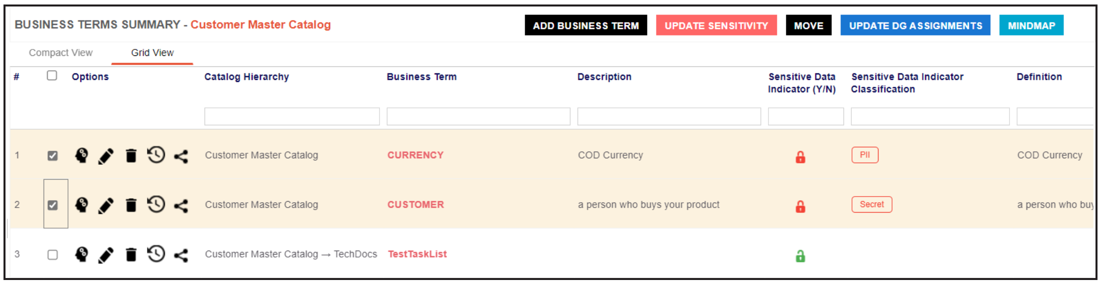
   

4. Click the **Grid View** tab.



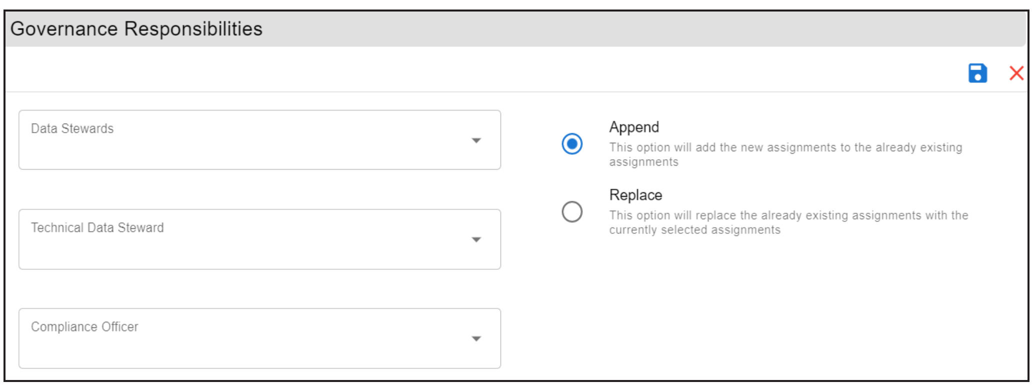
5. Select the required business assets.

   You can use the check box at the top to select all the business assets.



6. Click **Update DG Assignments**.

   The Governance Responsibilities page appears. It displays roles groups based on the roles and users assigned to the Catalog.



7. Select the required users for each roles group.
8. Use the following options:

   Append

Use this option to add new assignments to the existing assignments.

Replace

Use this option to replace existing assignments.

9. Click .

   The data governance assignment is updated.

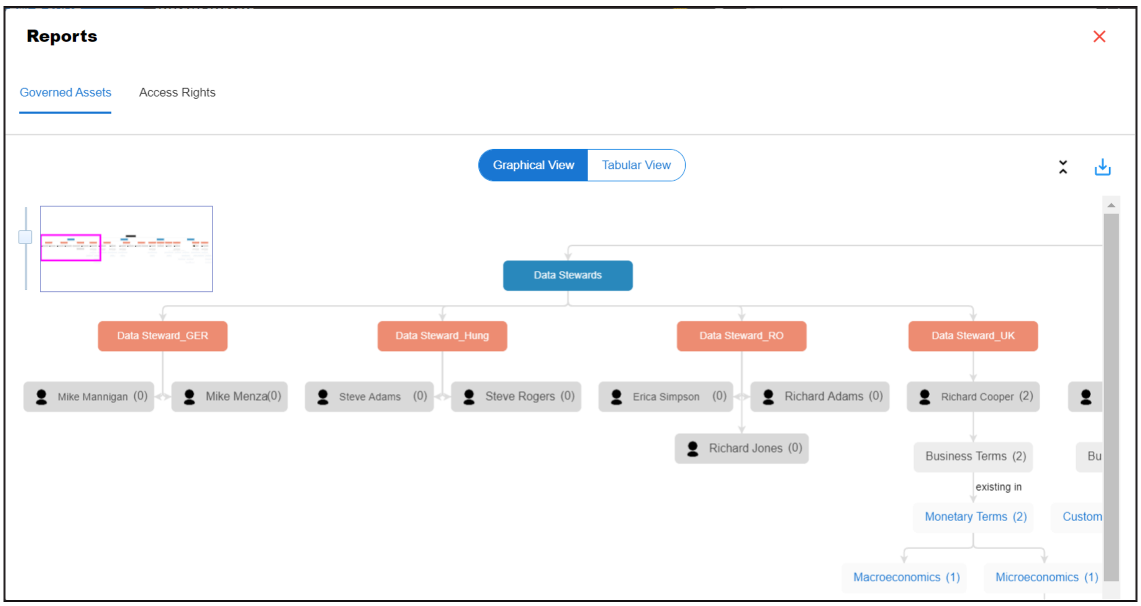
Viewing Access Rights and Data Governance Reports

From the Access to Enterprise Access Rights and Data Governance Documentation Reports page, you can view:

- Access rights
- Data governance reports

To view access rights and data governance reports, click from the top navigation pane.

Reports page appears. From the Reports page, you can view governed assets and access rights. For more information on viewing access rights and data governance reports, follow the below topics.

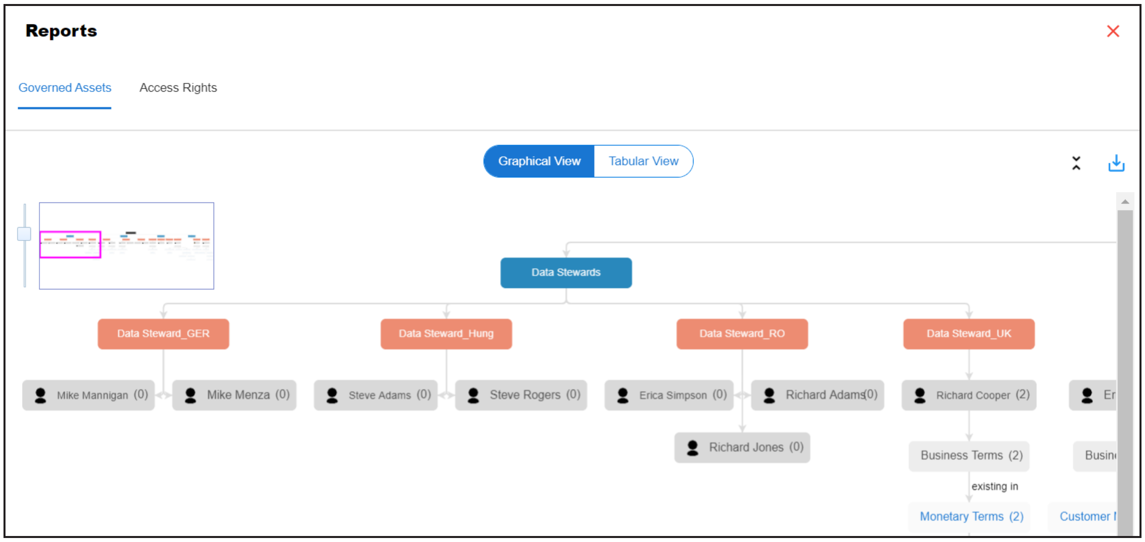


Data Governance Report

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

Viewing Access Rights and Data Governance Reports

To view reports, click the **Governed Assets** tab.



Use the following two views to view reports:

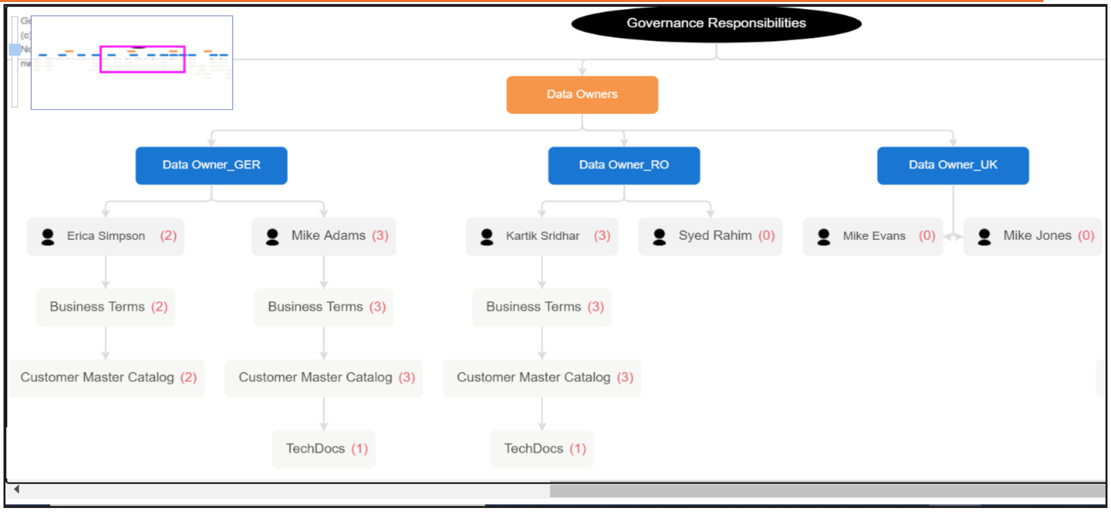
- **Graphical View**:
  The graphical view displays the governance responsibilities in a tree structure.
- **Tabular View**:
  The tabular view displays the governance responsibilities in a grid format.

By default, the graphical view opens.

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

- **Expand/Collapse** ( )

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



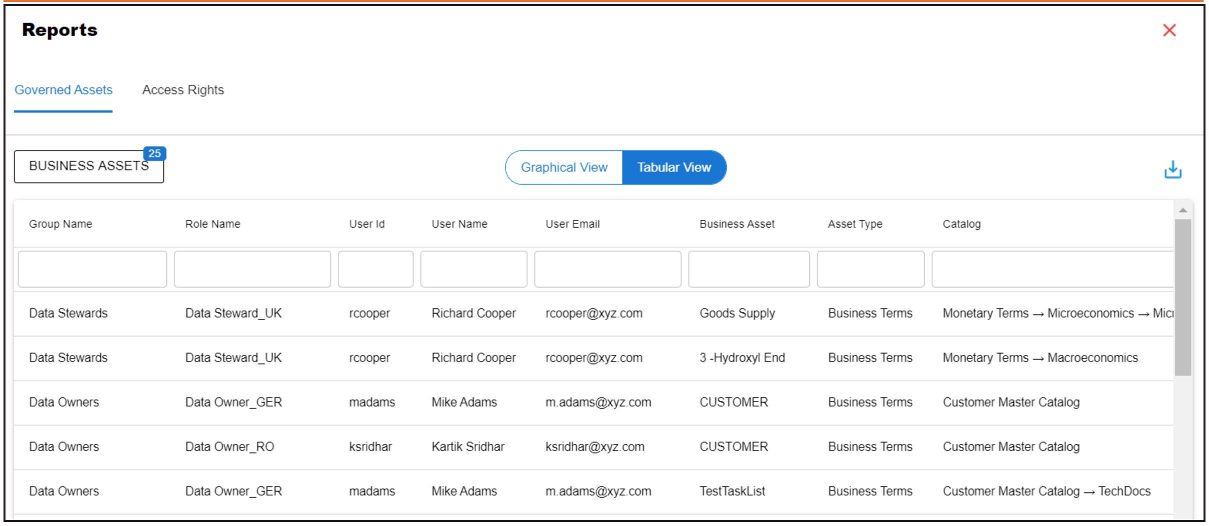
- **Pan View**

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

- **Export** ()

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

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



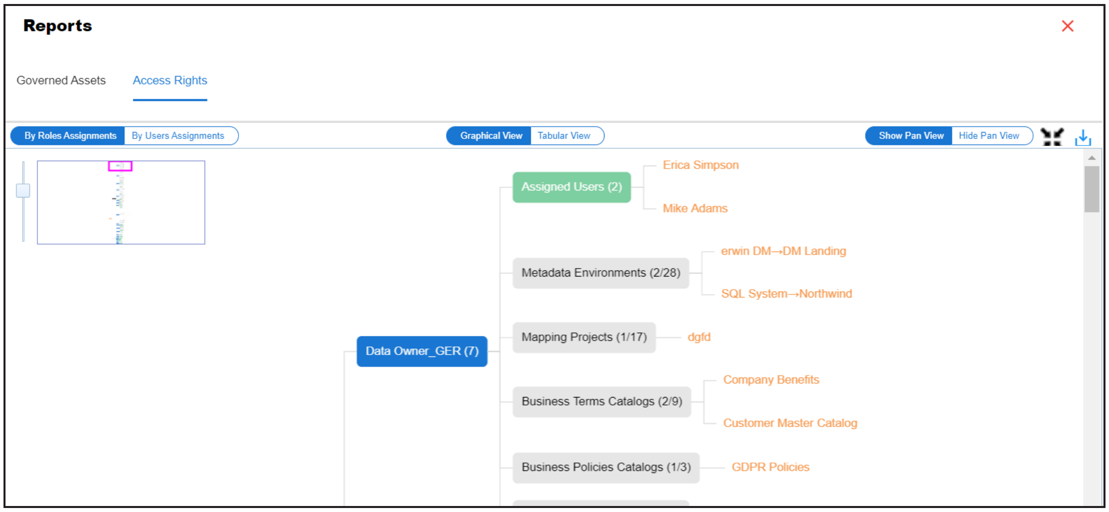
To download the report in the XLSX format, click .

Access Rights

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

To view access rights, follow these steps:

1. From the **Reports** page, click the **Access Rights** tab.



2. Use the following options:

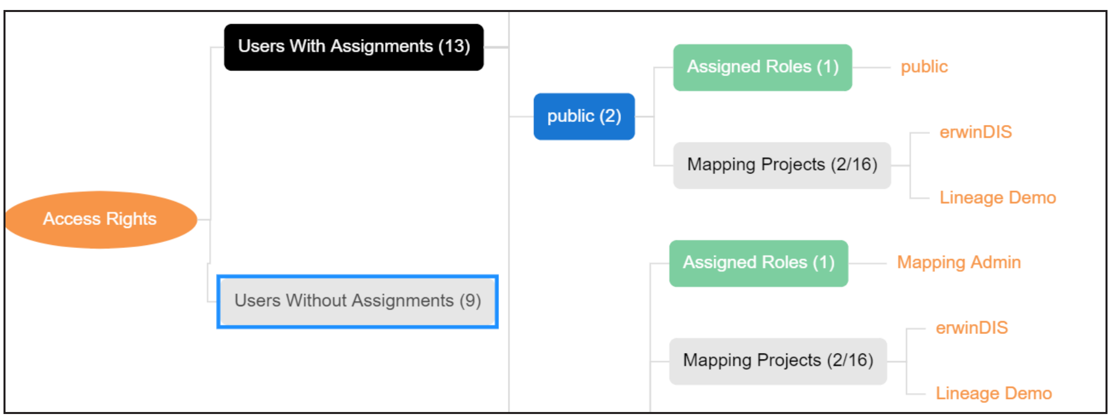
By Roles Assignments/By Users Assignments

Use this option to switch between the roles and user's assignments.

Graphical View/Tabular View

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

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



Use the following options on the Graphical View:

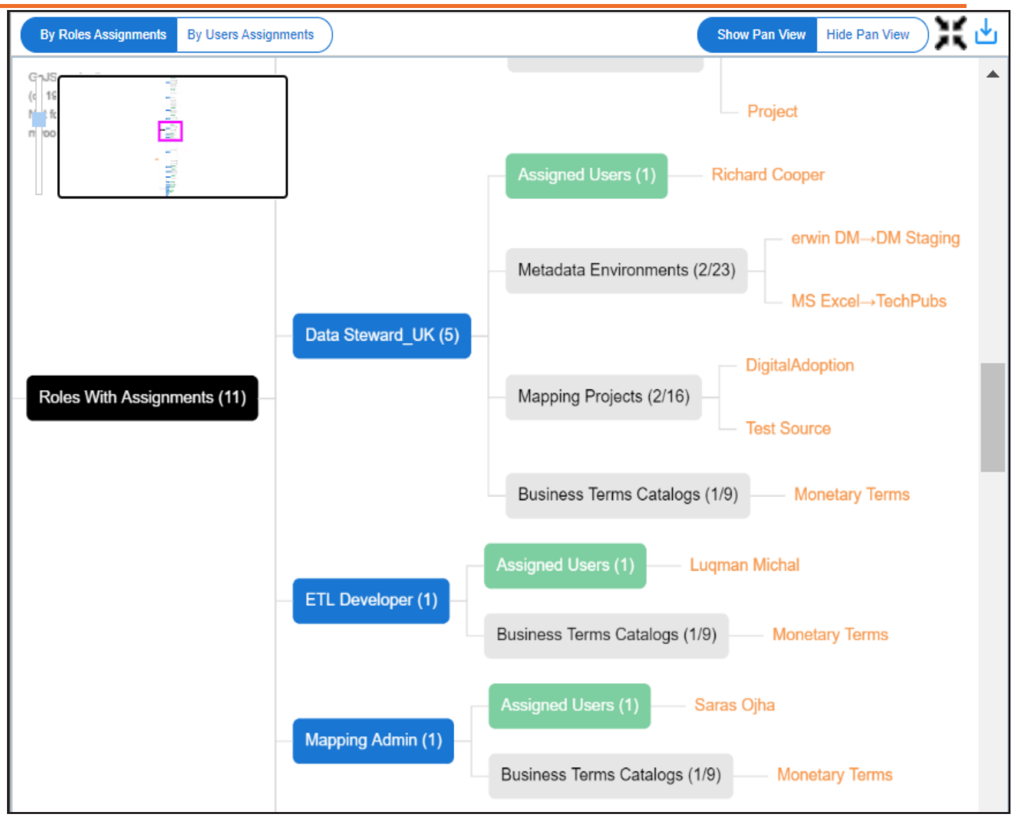
- **Show Pan View/Hide Pan View**

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

- **Expand/Collapse** ()

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



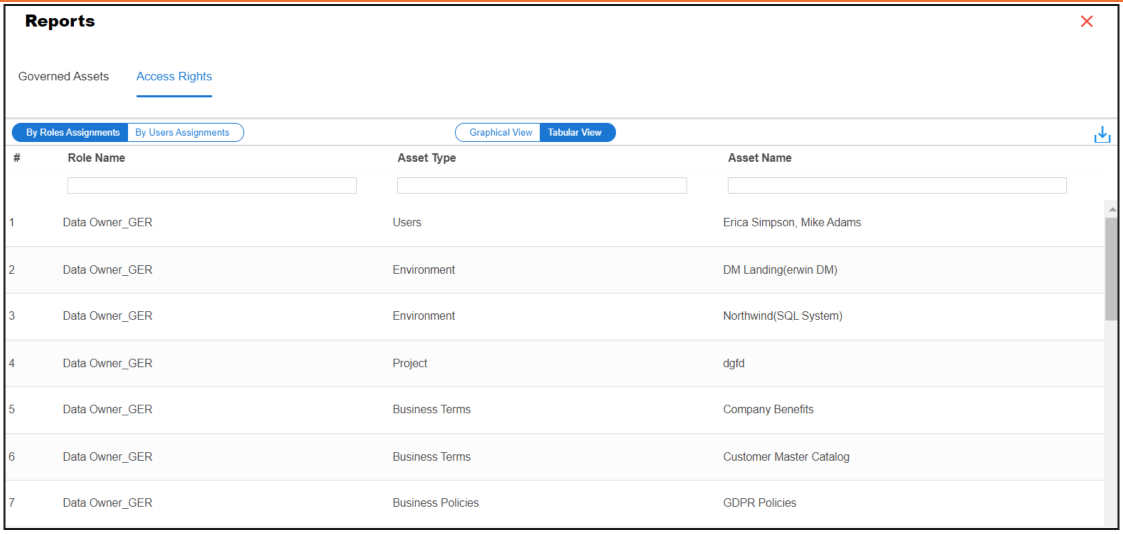
- **Expand Node Level**

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

- **Export Image** ( )

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

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

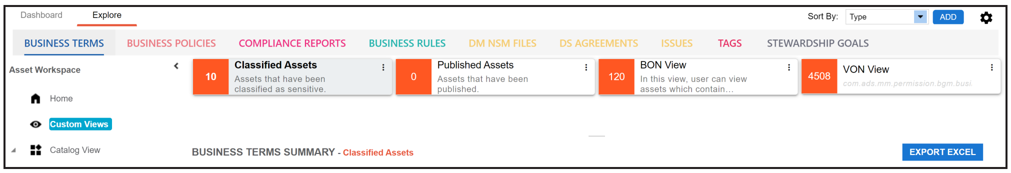


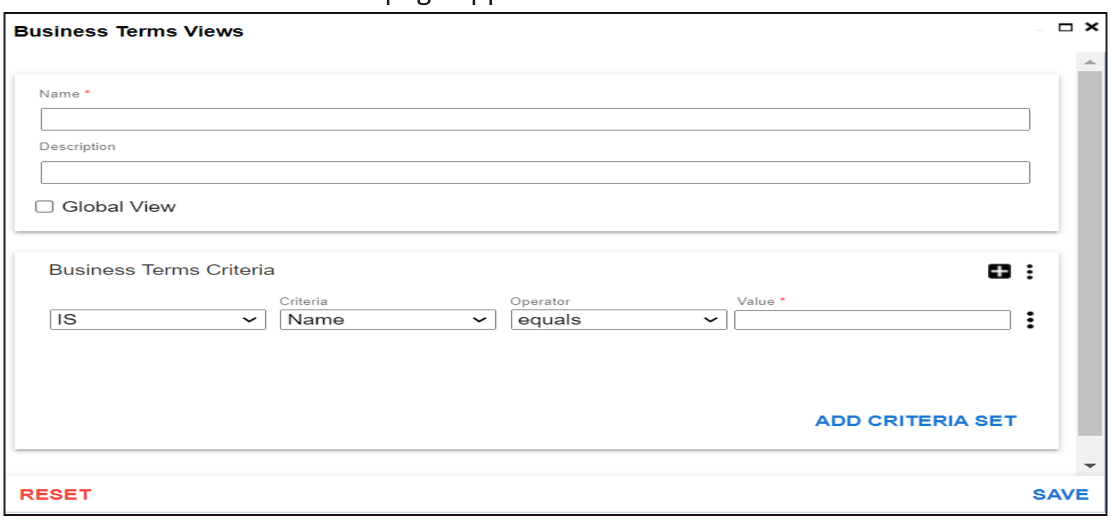
You can download the assignment details in the XLSX format. To download the assignments, on the **Tabular View**, click .

Creating Custom Views

Custom Views provide quick access to the business asset data that you access frequently or data that you want to be readily available. You can create custom views for all business asset types using criteria sets based on your requirements.

To create custom views, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager** > **Explore.**
2. In the business asset list, select a business asset.
3. In the **Asset Workspace** pane, click **Custom Views**.
   The Custom Views pane appears. It displays a list of available views, if any.


4. Click **ADD**.
   The <Business Assets> Views page appears.


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

Field Name	Description
Name	Specifies the name of the custom view. For example, BON View.
Description	Specifies the description of the custom view. For example, Displays BON custom view.
Global View	Specifies whether the custom view is accessible for everyone using the application.
<Business Asset> Criteria	Specifies the criteria based on which data is displayed in the custom view. For example, to display all business terms with a catalog name that contains TechPubs, set the criteria as follows: ▪ IS ▪ Criteria: Catalog Name ▪ Operator: contains ▪ Value: TechPubs

You can also add multiple conditions to a criteria set. In the **<Business_Assets> Criteria** section, click . Alternatively, you can also add multiple criteria sets. To add criteria sets, click **Add Criteria Set**.

6. Click **Save**.
   A custom view is added to the Custom Views list.

Once you create custom views, you can manage them. Managing Custom Views involves:

- Modifying views
- Deleting views

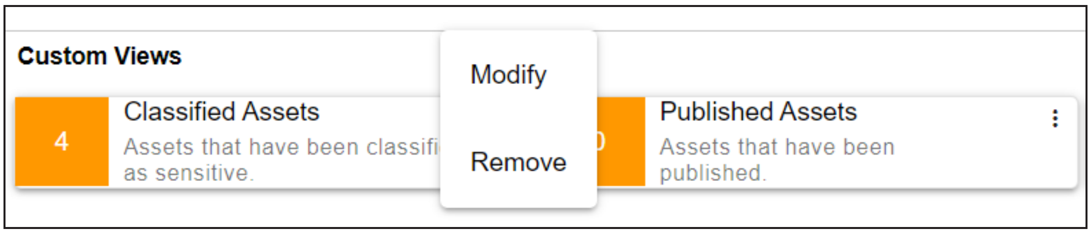
Managing Custom Views

Managing custom views involves:

- Modifying views
- Deleting views

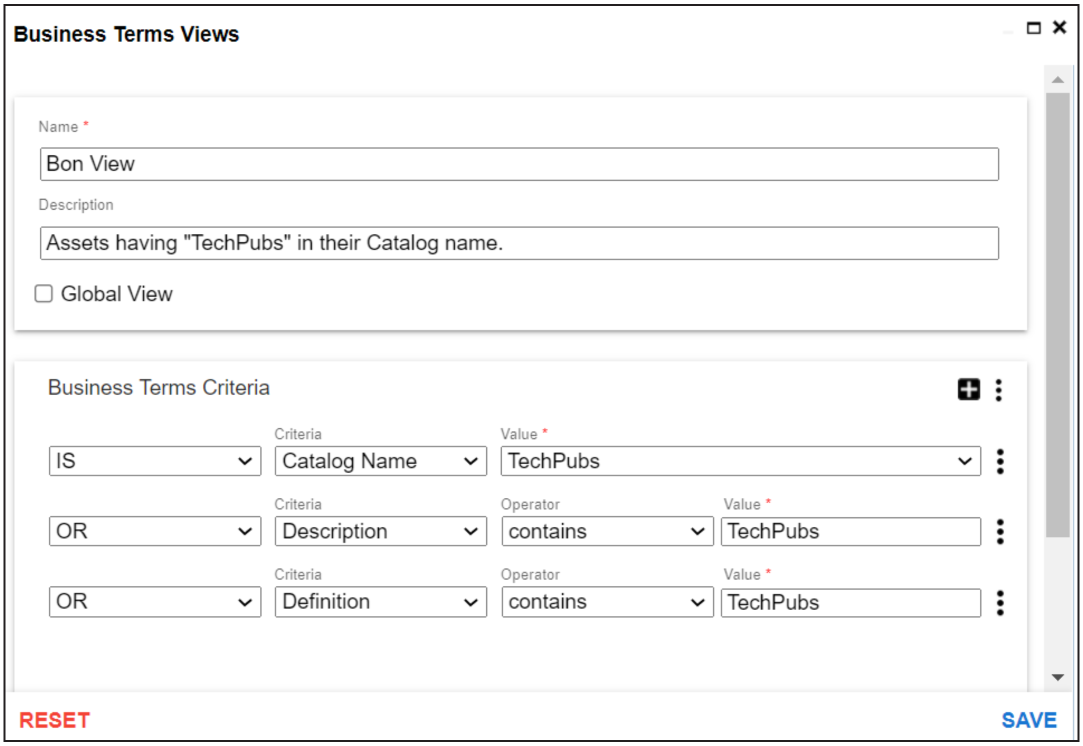
To modify custom views, follow these steps:

1. On the view card, click ⋮ .
   The options to manage the view appear.



2. Click **Modify**.

   The <Business Assets> Views page appears.



3. Modify the required properties (name, description, and global view) of the view. Also, modify the **<Asset_Name> Criteria** as required.

   You can also modify the order of the conditions configured in a criteria set. Click ⋮ for a criteria and use the following options:

   Move up

   Use this option to move criteria up within the business asset set.

   Move down

   Use this option to move criteria down within the business asset set.

   Remove

   Use this option to remove criteria from the business asset set that is no more required.

Apart from modifying the existing criteria set, you can add multiple criteria sets. To add criteria set, click **Add Criteria Set**.

4. Click **Save**.

The changes made to custom view are saved and the results based on the updated configuration are available on the **Custom Views** page.