erwin Data Intelligence

Resource Management Guide

Release v13.2

Legal Notices

Contact erwin

Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

Access the erwin support site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for erwin Data Intelligence (erwin DI), and includes the following:

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

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

Provide Feedback

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

News and Events

Visit News and Events to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

Contents

Managing Resources

This section walks you through managing resources in the Resource Manager.

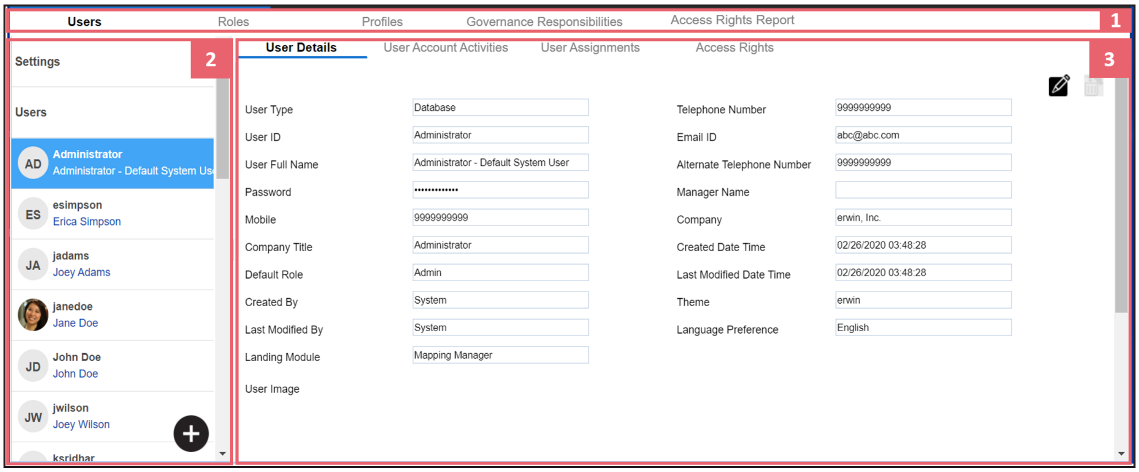
The Resource Manager is key to data governance where you do the following:

- Create roles and users
- Assign roles to users for the access level permissions
- Assign technical and business assets to users and roles in bulk
- View access rights
- Create roles group based on governance responsibilities
- View governance responsibilities report
- Create profiles to set up user-specific mapping grid views in the Mapping Manager and code value grid views in the Codeset Manager

The application has a default Administrator user, Administrator role, and a Default profile which you cannot edit or delete. For further information on accessing and using the Resource Manager, refer to the Using Resource Manager topic.

Using Resource Manager

To access the Resource Manager, go to **Application Menu** > **Data Catalog** > **Resource Manager**. The Resource Manager dashboard appears:



UI Section	Function
1-Utility Pane	Use this pane to navigate through Users, Roles, Profiles, Governance Responsibilities, and Access Rights Report.
2-Browser Pane	Based on your selection in the utility pane, use this pane to browse through users list, roles list, profiles, and roles group.
3-Right Pane	Use this pane to view or work on the data displayed based on your selection in the browser pane.

Managing resources involves the following:

- Creating and managing roles
- Creating and managing users
- Creating and managing profiles
- Viewing access rights report
- Configuring governance responsibilities

Creating Roles

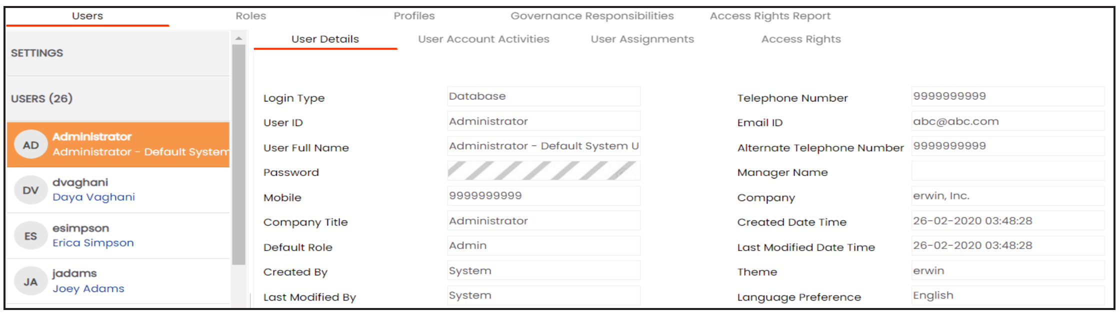
Use roles to assign access-level permissions to users. While few roles are available by default in erwin DI, you can create custom roles.

> The Administrator role is system-generated and you cannot edit or delete it.

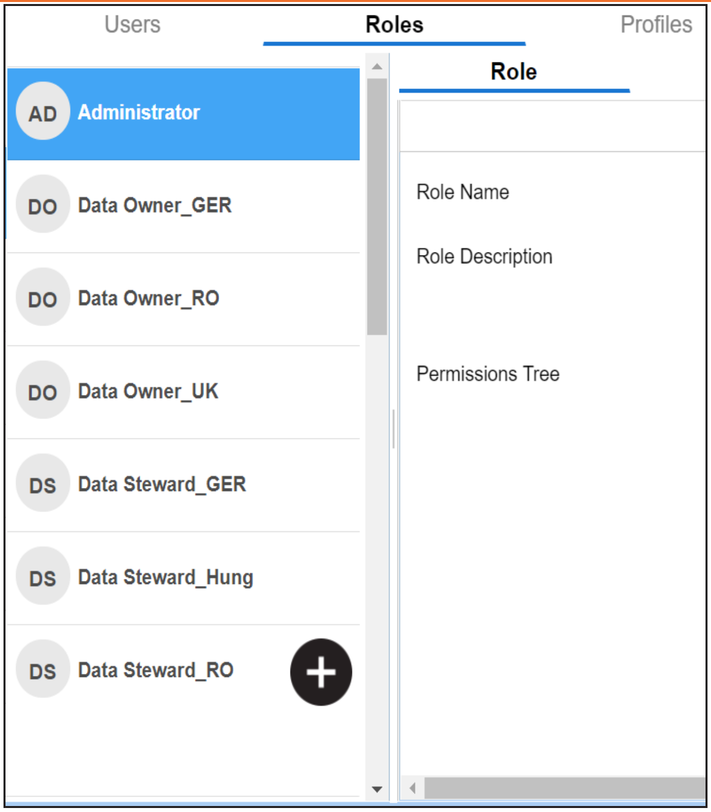
To create roles, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Resource Manager**.

   The Resource Manager page appears. By default the Users tab opens.

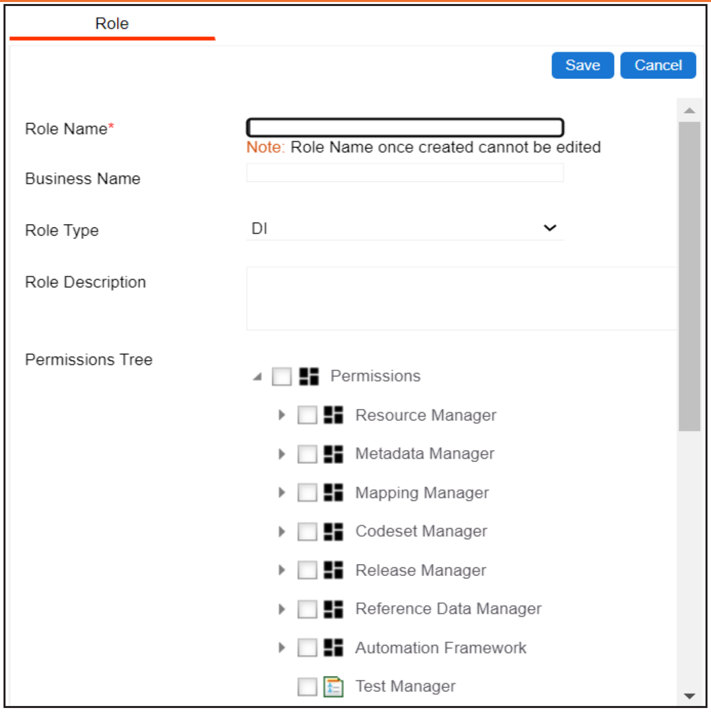
   

2. Click the **Roles** tab.



3. Click .

   The Role page appears.



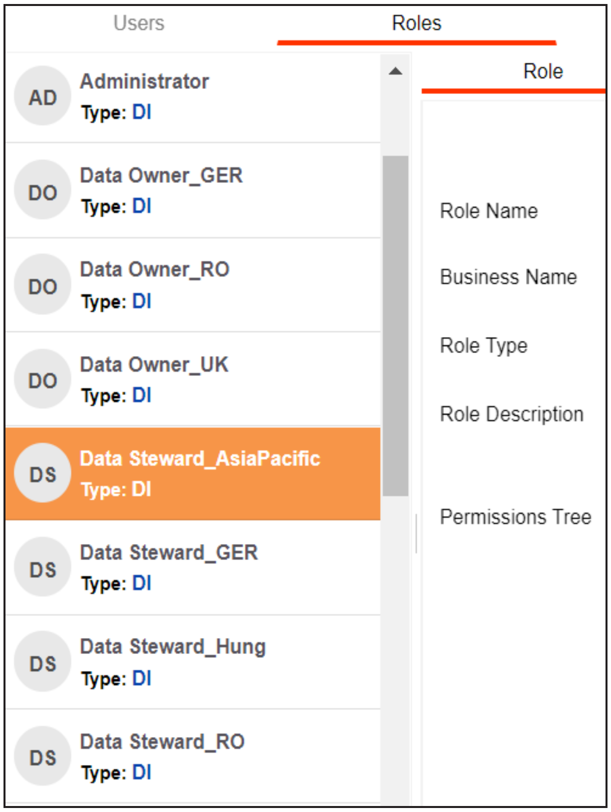
4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Tab	Description
Role Name	Specifies the user-defined role name. For example, Data Steward_AsiaPacific.
Business Name	Specifies the user-defined business name. For example, Data_Steward_Mapping.
Role Type	Specifies the role type ▪ **DI**: Indicates that the role is available only for a Data Intelligence (DI) user ▪ **BU**: Indicates that the role is available only for a Business User (BU)
Role Description	Specifies the role description. For example, This role has access to the Resource Manager and Mapping Manager.

5. Under the **Permissions Tree** section, select the check box for the modules or the permission object to which you want to grant access to the role.

6. Click **Save**.

   A role is created and added to the Roles list.



Once a role is created, you can:

- Assign it to users
- Configure access rights

You can also manage roles by using the options available on clicking the role. Managing roles involves:

- Editing roles
- Deleting roles
- Cloning roles

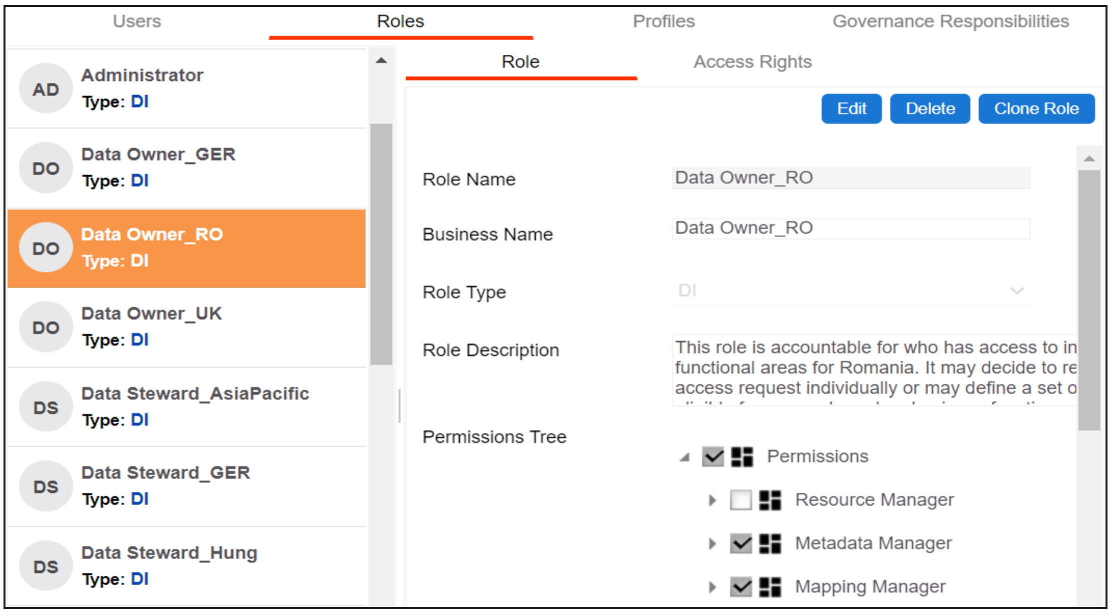
Configuring Access Rights

You can configure role access rights and assign assets to roles. Assets here refer to the environments in Metadata Manager, projects in Mapping Manager, and catalogs in Business Glossary Manager.

To configure access rights, follow these steps:

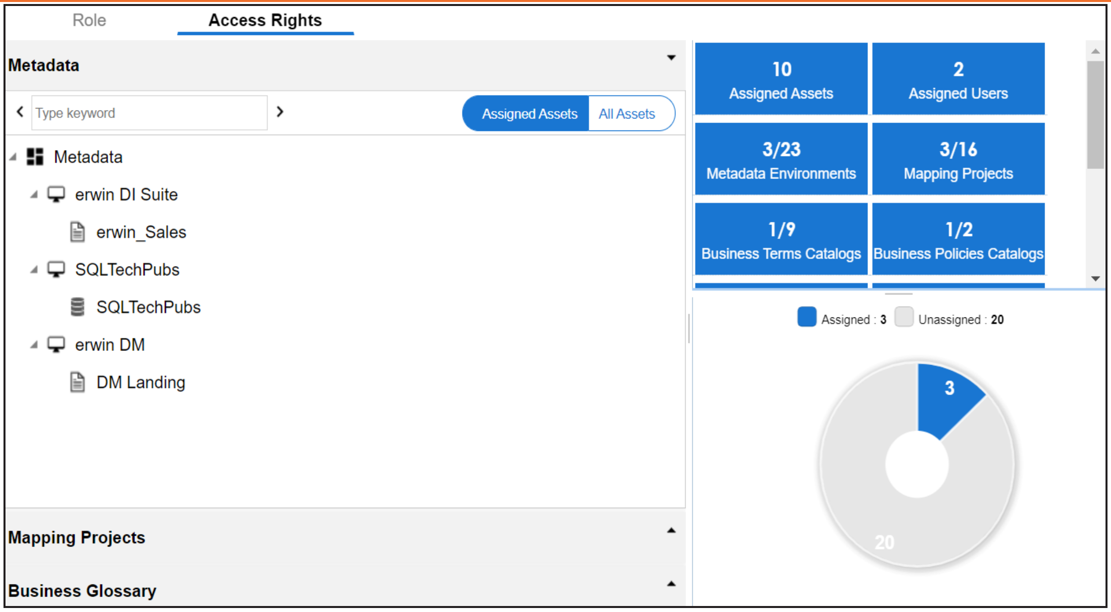
1. On the **Roles** tab, click a role.

   By default, the Role tab opens.

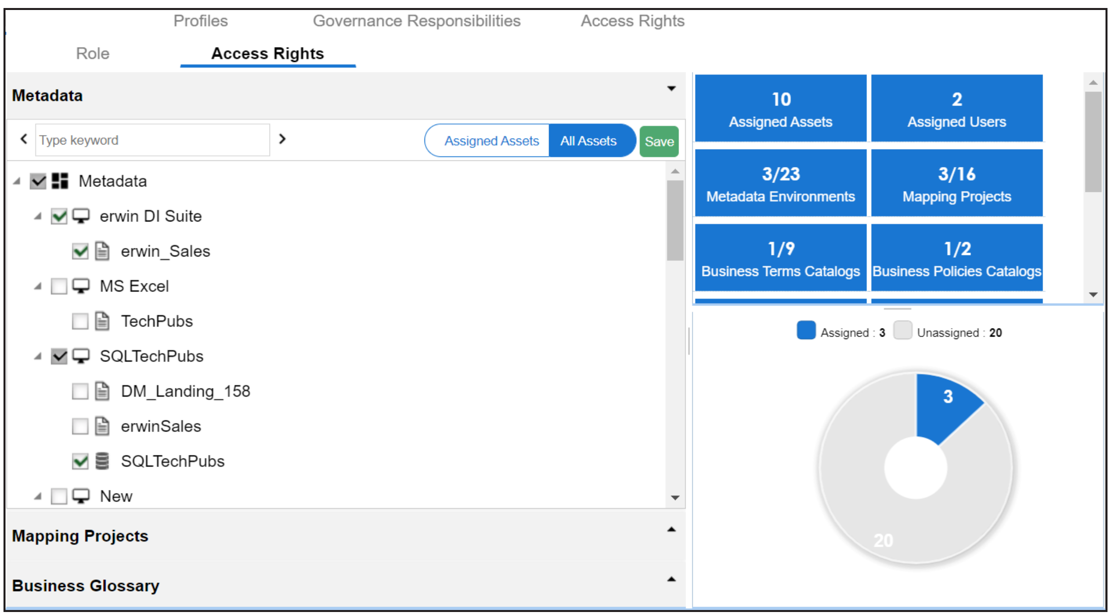
2. Click the **Access Rights** tab.

   By default, the Metadata pane appears. It displays the environments assigned to the role.



3. Click the required pane and switch  to **All Assets**.

For example, if you switch to All Assets in the Metadata pane, all the environments appear.



4. Select the required assets.

5. Click **Save**.

   The selected assets are assigned to the role.

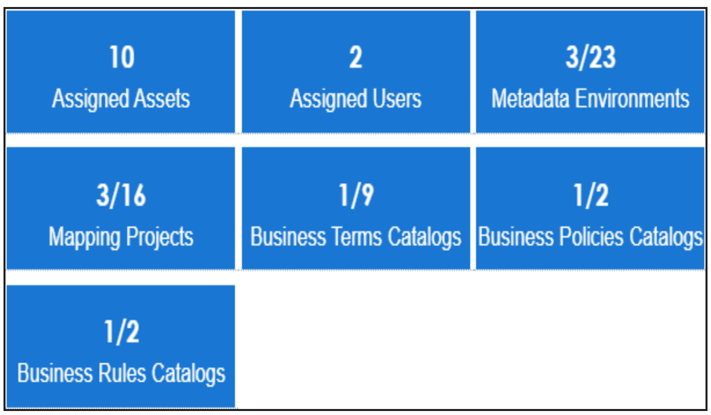
After, assigning assets to roles, you can view a summary of role assignments with the help of infographics.

Viewing Infographics

The Access Rights tab displays metrics that help you analyze and track role assignments. It presents this information using statistical boards, charts, or graphs.

Statistical Boards

The following statistical boards display metrics about role assignments:



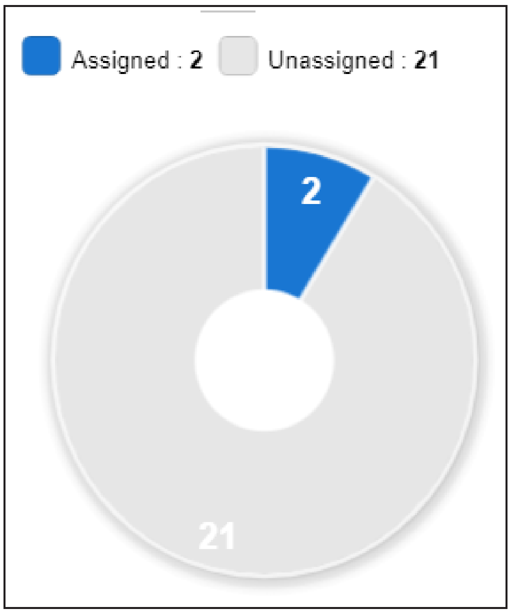
- **Assigned Assets**: It displays the total number of assigned assets to the role. This includes all the environments, projects, and catalogs assigned to the role.
- **Assigned Users**: It displays the number of user assigned to the role.
- **Metadata Environments**: It displays the number of environments in the Metadata Manager assigned to the role.
- **Mapping Projects**: It displays the number of projects in the Mapping Manager assigned to the role.
- **Business Terms Catalogs**: It displays the number of business terms catalogs in the Business Glossary Manager assigned to the role.

- **Business Policies Catalogs**: It displays the number of business policies catalogs in the Business Glossary Manager assigned to the role.
- **Business Rules Catalogs**: It displays the number of business rules catalogs in the Business Glossary Manager assigned to the role.

Metadata

In the Metadata pane, the pie-chart displays the number of assigned and unassigned environments to the role. The blue colored slice corresponds to the assigned environments.

For example, the following pie-chart displays two assigned environments and twenty-one unassigned environments.

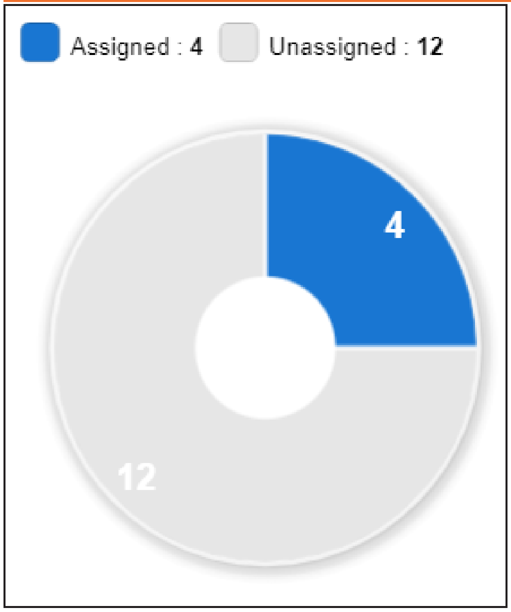


Mapping Projects

In the Mapping Projects pane, the pie-chart displays the number of assigned and unassigned projects to the role.

The blue colored slice corresponds to the assigned projects.

For example, the following chart displays four assigned projects and twelve unassigned projects.

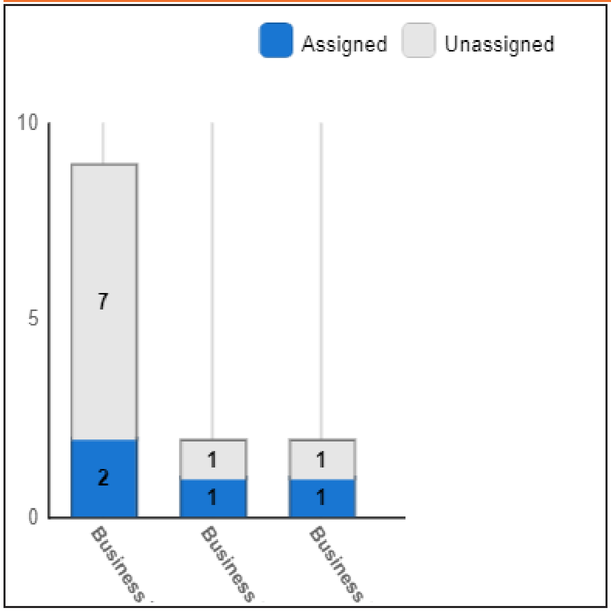


Business Glossary

In the Business Glossary pane, the bar graph displays the number of assigned and unassigned catalogs of each type.

The blue colored segment of the bar corresponds to assigned catalogs.

For example, the following bar graph displays two assigned business terms catalogs and seven unassigned business terms catalogs.


Assigned
Unassigned
10
5
0
7
2
1
1
1
1
Business .
Business
Business

Managing Roles

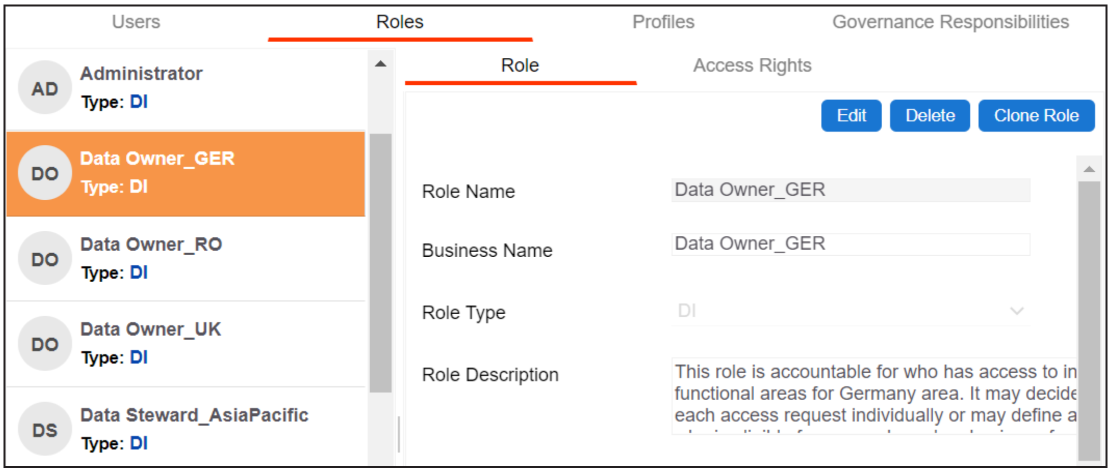
Managing Roles involves:

- Editing or deleting Roles
- Cloning Roles

To manage Roles, follow these steps:

1. On the **Roles** tab, click a role.

   By default, the Role tab opens.



2. Use the following options on the Role tab:

   Edit

   Use this option to update roles. You can update the Permission Tree and Role Description.

   You cannot edit the Role Name.

   Delete

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

   Clone Role

   Use this option to clone a role. The cloned role can have different role name and description.

Creating Users and Assigning Roles

Users are used to grant members of your team access to erwin DI and your projects. While a few users are available by default, you can create users for your organization using the Resource Manager. While you create users, you also assign them roles to define their access-level permissions.

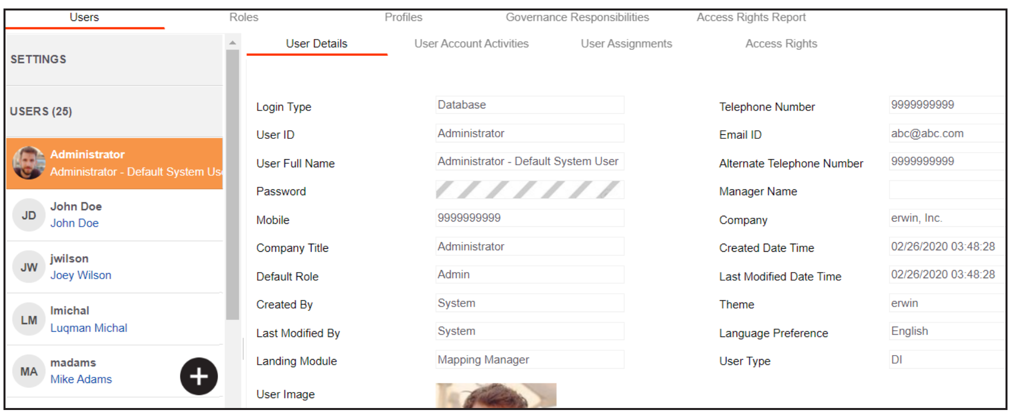
When you upgrade from 11.5 or lower app version, the Business User Portal (BUP) users migrate to the latest erwin DI version as BU user type.

> The Administrator user is available by default and you cannot edit or delete this user.

To create users, follow these steps:

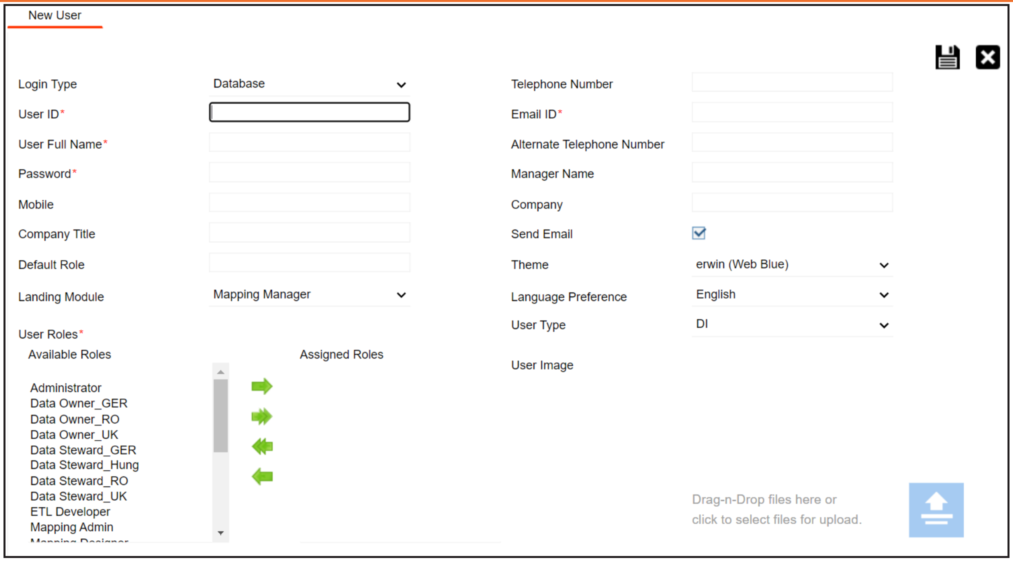
1. Go to **Application Menu** > **Data Catalog** > **Resource Manager**.

   By default, the Users tab opens.

2. Click .

   The New User page appears.



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

> The fields marked with an asterisk (*) is mandatory.

Field Name	Description
Login Type	Specifies whether the user type is Database, LDAP (Lightweight Directory Access Protocol), SAML (Security Assertion Markup Language), or NON LOGIN. For example, Database. ▪ **Database**: Select this option if the user authentication is through the credentials created in the Resource Manager. ▪ **LDAP**: Select this option if the user authentication is through a directory server, such as MS Active Directory, OpenLDAP or OpenDJ. ▪ **SAML**: Select this option if the user authentication is through SAML attributes. For more details on configuring SSO, refer to the SSO Configuration Guide.

Field Name	Description
	▪ **NON LOGIN**: Select this option if the user is not required to log on to the application.
User ID*	Specifies the user name of the user to log on to erwin DI. For example, lmichal.
User Full Name*	Specifies the user's full name. For example, Luqman Michal.
Password*	Specifies the password to log on to erwin DI. For example, Luqman@1. The administrator provides a default password, which can be changed later. The administrator can also enforce a password policy. For more information on enforcing password policy, refer to the Configuring Settings topic.
Mobile	Specifies the user's valid mobile number. For example, +658374414288.
Company Title	Specifies the user's company title or designation. For example, Data Administrator.
Default Role	Specifies the default role of the user. For example, Data Steward_RO.
Landing Module	Specifies the landing module for the user. For example, Mapping Manager. The Landing Module is the first page displayed when a user logs in.
User Roles*	Select roles under Available Roles list-box and move them to Assigned Roles list-box using the arrows (or). Similarly, to change existing role assignment, select roles under Assigned Roles list-box and move them back to Available Roles list-box using the arrows (or). For adding a new role under the Available Roles list-box, refer to the Creating Roles topic. You can assign the Legacy Data Steward role to a user. This enables you

Field Name	Description
	to assign this user as a Data Steward in the Metadata Manager and Reference Data Manager.
Telephone Number	Specifies the valid telephone number of the user. For example, 1-800-783-7946.
Email ID*	Specifies the user's email address. For example, l.michal@mauris.edu
Alternate Telephone Number	Specifies the user's valid alternate telephone number. For example, 1-802-456-7946.
Manager Name	Specifies the name of the user's reporting manager. For example, John Doe.
Company	Specifies the name of the user's company. For example, ABC Consulting Services.
Send Email	Specifies whether to send email to the user's email ID. Select the Send Email check box to send an email notification to the user's email ID. For more information on configuring notifications, refer to the Configuring Notifications topic.
Theme	Specifies the theme for the user to set the appearance of erwin DI. By default, it is set to erwin (Web Blue).
Language Preference	Specifies the language preferred by the user. For example, English. For more information on language settings, refer to the Configuring Language Settings topic.
User Type	Specifies the user type. ▪ **DI**: Indicates the user type is Data Intelligence (DI), and the users have access to DI, and BU modules ▪ **BU**: Indicates that the user type is Business User (BU), and the users have access to BU module

Field Name	Description
User Image	Specifies the physical image file being attached to the user. Drag and drop a user's image file or click to select and upload the image file.

4. Click .

   A new user is created and added to the Users list.

Once a user is created, you can configure its access rights with respect to the assets in the Metadata Manager, Mapping Manager, and Business Glossary Manager. After assigning users to projects and mappings, you can view the user activity report and mapping assignments on the User Assignments tab.

You can also manage a user by using the options available on clicking the user. Managing users involves:

- Editing
- Deleting
- Viewing user account activities
- Viewing users activity history

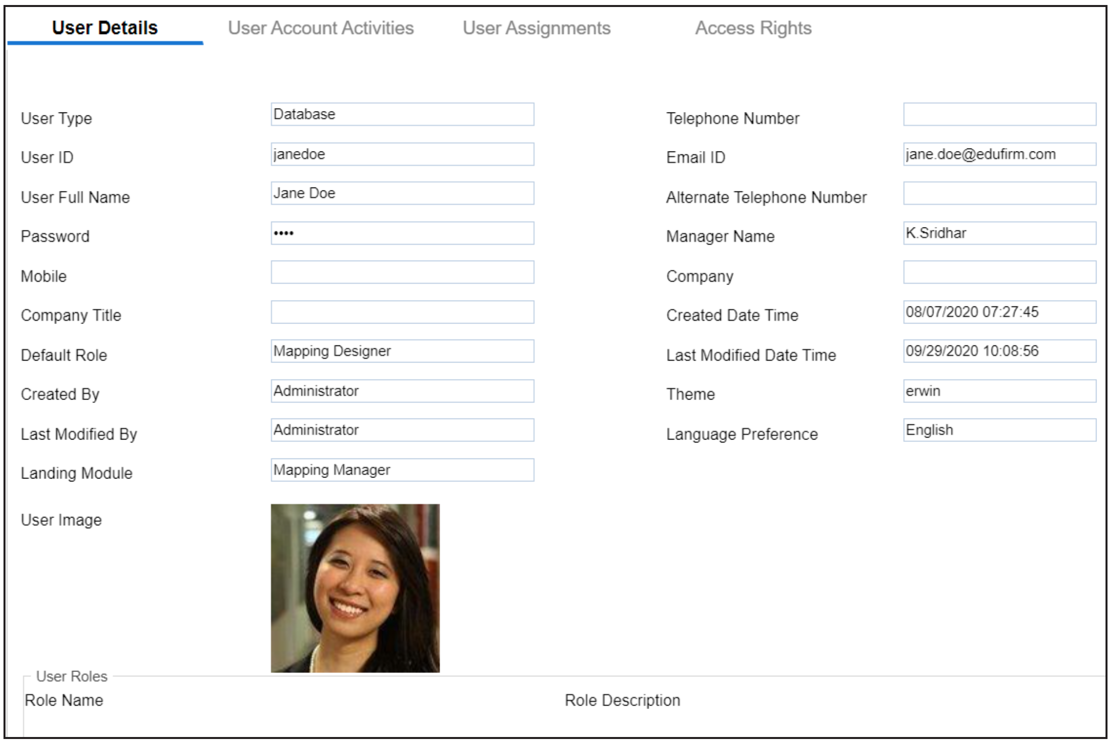
Configuring Access Rights

You can configure user access rights and assign assets to users. Assets here refer to the environments in Metadata Manager, projects in Mapping Manager, and catalogs in Business Glossary Manager.

To configure access rights, follow these steps:

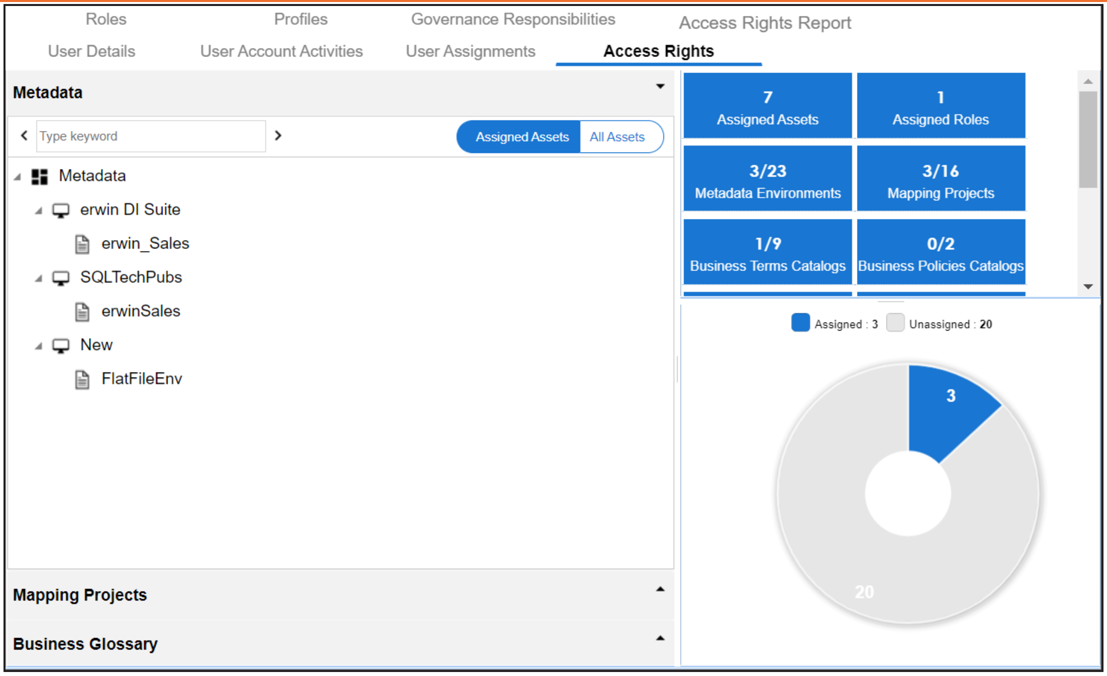
1. On the **Users** tab, click a user.

   By default, the User Details tab opens.

2. Click the **Access Rights** tab.

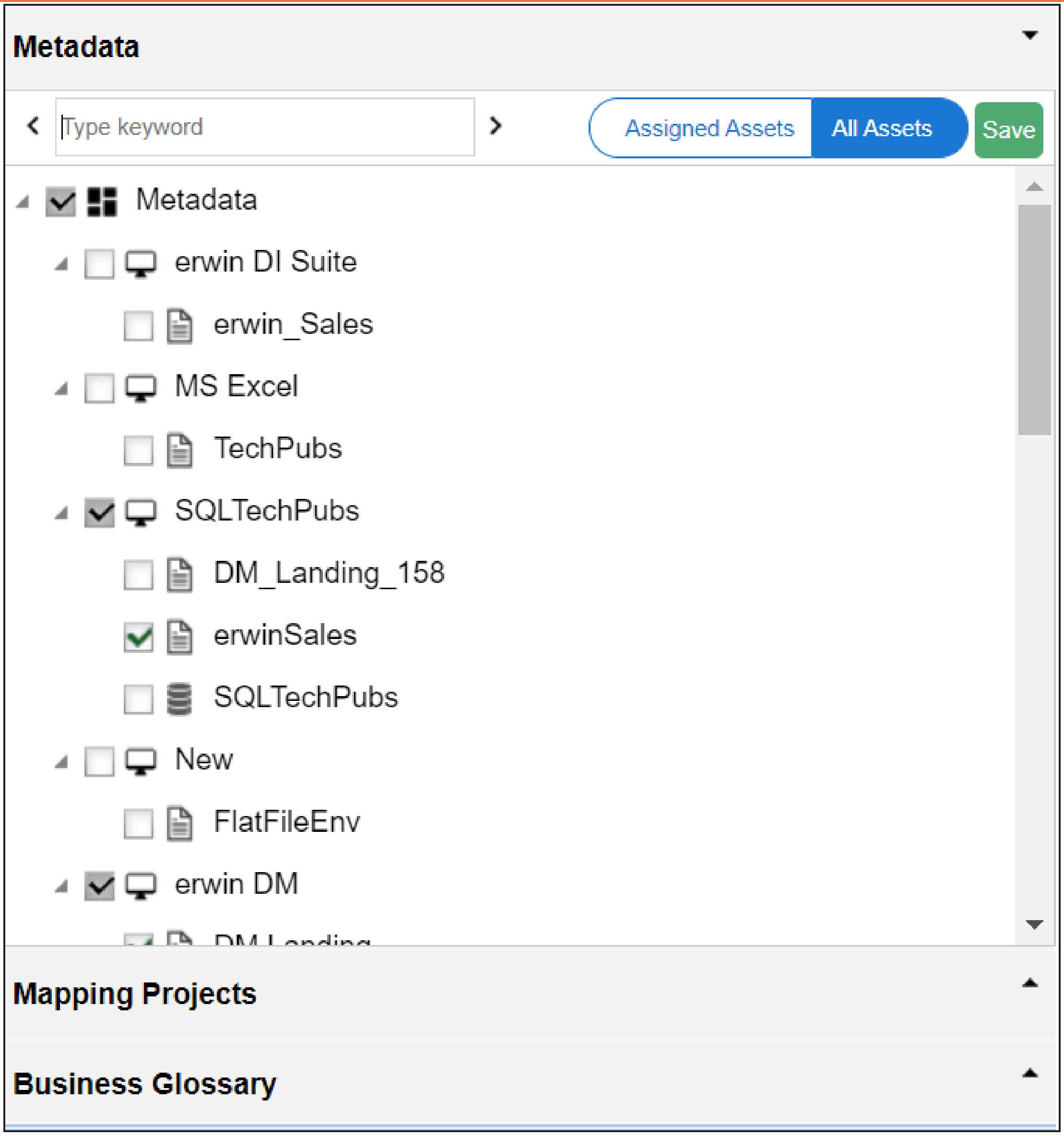
   By default, the Metadata pane appears. It displays the environment assigned to the role.



3. Click the required pane and switch 

to **All Assets**.

For example, if you switch to All Assets in the Metadata pane, all the environments appear.



4. Select the required assets.
5. Click **Save**.

   The selected assets are assigned to the user.

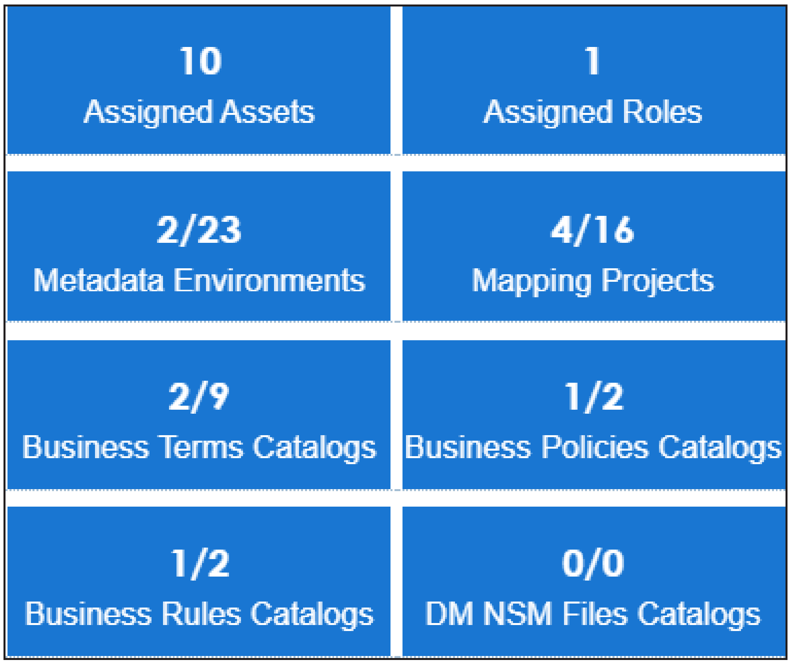
After, assigning assets to roles, you can view a summary of user assignments with the help of infographics.

Viewing Infographics

The Access Rights tab displays metrics that help you analyze and track user assignments. It presents this information using statistical boards, charts, or graphs.

Statistical Boards

The following statistical boards display metrics about user assignments:



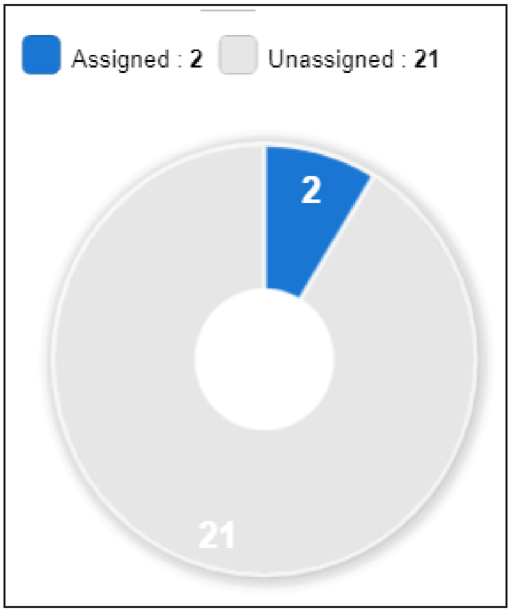
- **Assigned Assets**: It displays the total number of assigned assets. This includes all the environments, projects, and catalogs assigned to the user.
- **Assigned Roles**: It displays the number of roles assigned to the user.
- **Metadata Environments**: It displays the number of environments in the Metadata Manager assigned to the user.
- **Mapping Projects**: It displays the number of projects in the Mapping Manager assigned to the user.
- **Business Terms Catalogs**: It displays the number of business terms catalogs in the Business Glossary Manager assigned to the user.

- **Business Policies Catalogs**: It displays the number of business policies catalogs in the Business Glossary Manager assigned to the user.
- **Business Rules Catalogs**: It displays the number of business rules catalogs in the Business Glossary Manager assigned to the user.

Metadata

In the Metadata pane, the pie-chart displays the number of assigned and unassigned environments to the user. The blue colored slice corresponds to the assigned environments.

For example, the following pie-chart displays two assigned environments and twenty-one unassigned environments.

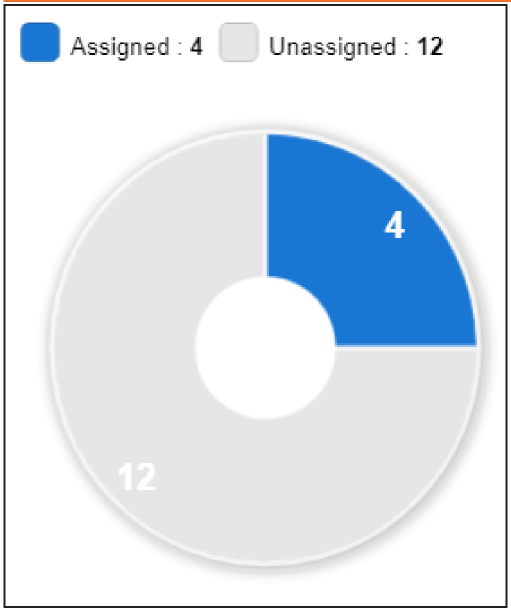


Mapping Projects

In the Mapping Projects pane, the pie-chart displays the number of assigned and unassigned projects to the user.

The blue colored slice corresponds to the assigned projects.

For example, the following chart displays four assigned projects and twelve unassigned projects.

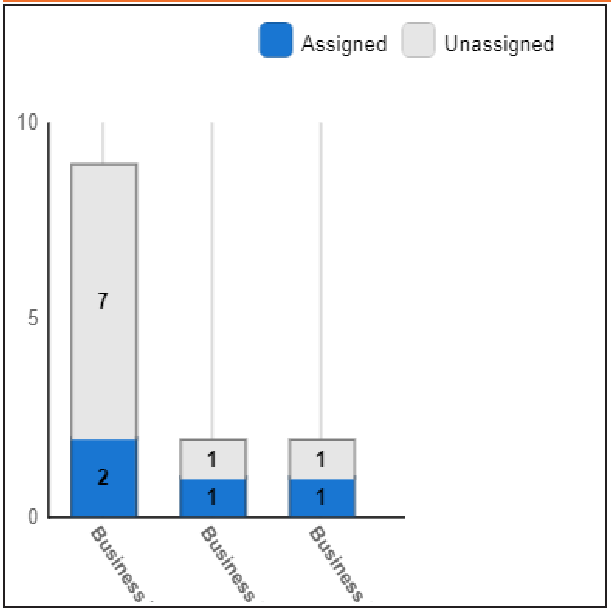


Business Glossary

In the Business Glossary pane, the bar graph displays the number of assigned and unassigned catalogs of each type.

The blue colored segment of the bar corresponds to assigned catalogs.

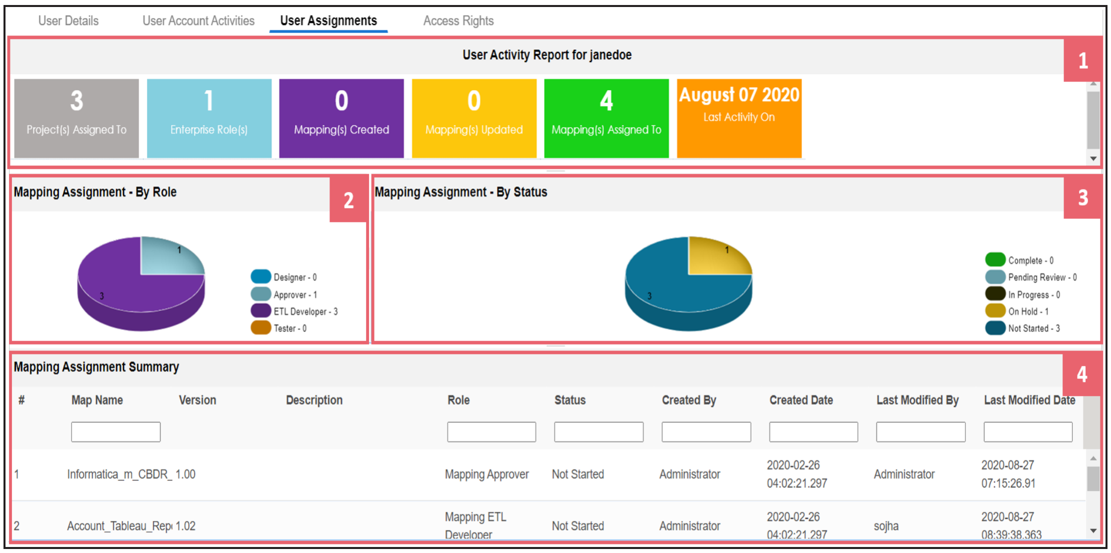
For example, the following bar graph displays two assigned business terms catalogs and seven unassigned business terms catalogs.


Assigned
Unassigned
10
5
0
7
2
1
1
1
1
Business
Business
Business

Viewing User Assignments

The User Assignments tab displays metrics that help you analyze and track user assignments with respect to the Mapping Manager. It presents this information using statistical boards, charts, and grid.

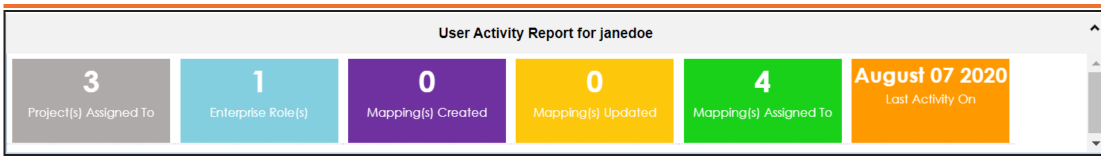
To view user assignments, on the **Users** tab, click the **User Assignments** tab.



UI Section	Function
1-User Activity Report	It displays a snapshot of statistics related to the user activities.
2-Mapping Assignment - By Role	It displays information about the mapping assignment based on roles.
3-Mapping Assignment - By Status	It displays information about the mapping assignment based on their statuses.
4-Mapping Assignment Summary	It displays a list of maps assigned to the user.

User Activity Report

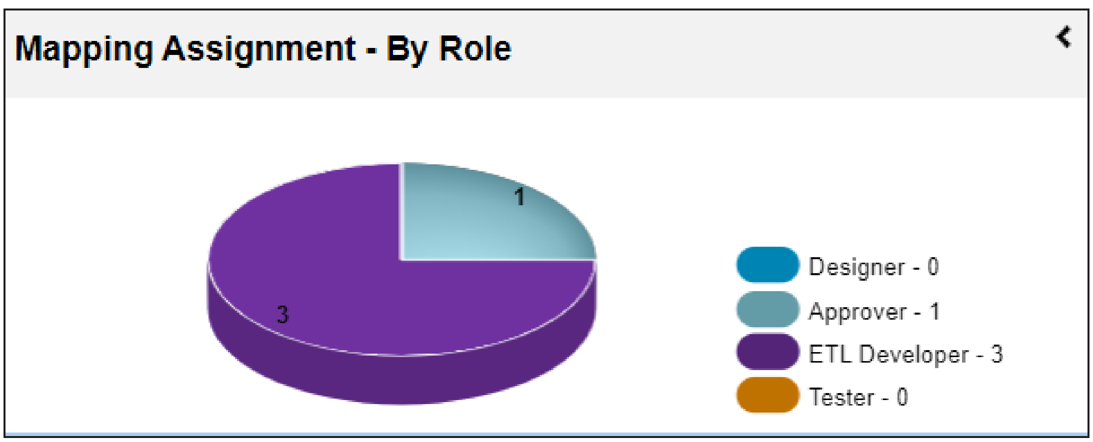
The User Activity Report pane displays the following statistical boards:



- **Project(s) Assigned To**: It displays the number of mapping projects assigned to the user.
- **Enterprise Roles**: It displays the number of roles assigned to the user.
- **Mappings Created**: It displays the number of maps created by the user.
- **Mappings Updated**: It displays the number of maps updated by the user.
- **Mapping(s) Assigned To**: It displays the number of mappings assigned to the user
- **Last Activity On**: It displays the date and time of last activity of the user.

Mapping Assignment - By Role

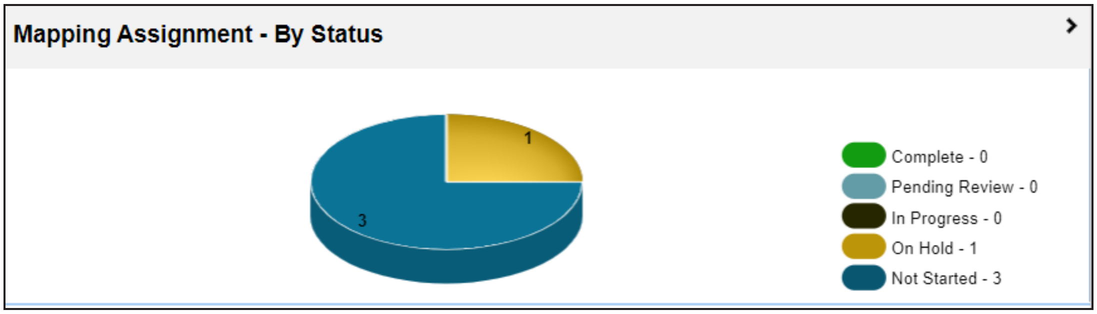
The Mapping Assignment - By Role pane displays the number of mappings based on the user's role in a pie-chart.



Each slice of the pie-chart corresponds to a role. To view detailed information about mapping assignment, click a slice. The Mapping Assignment Summary pane displays the map names based on the role.

Mapping Assignment - By Status

The Mapping Assignment - By Status pane displays number of mappings based on the status in a pie-chart.



Each slice corresponds to a status. To view detailed information about the mapping assignment, click a slice. The Mapping Assignment Summary pane displays the map names based on the status.

Mapping Assignment Summary

By default, the Mapping Assignment Summary pane displays all the maps assigned to the user in the grid format.

Mapping Assignment Summary

#	Map Name	Version	Description	Role	Status	Created By	Created Date	Last Modified By	Last Modified Date
1	Informatica_m_CBI	1.00		Mapping Approver	Not Started	Administrator	2020-02-26 04:02:21.297	Administrator	2020-08-27 07:15:26.91
2	Account_Tableau_I	1.02		Mapping ETL Developer	Not Started	Administrator	2020-02-26 04:02:21.297	sojha	2020-08-27 08:39:38.363
3	TechPubs	1.00		Mapping ETL Developer	On Hold	Administrator	2020-05-23 18:51:12.91	Administrator	2020-08-27 06:50:59.303

You can click a slice in the above pie-charts to view the mapping assignment in the grid. It includes map name, roles of the user, and status of the maps.

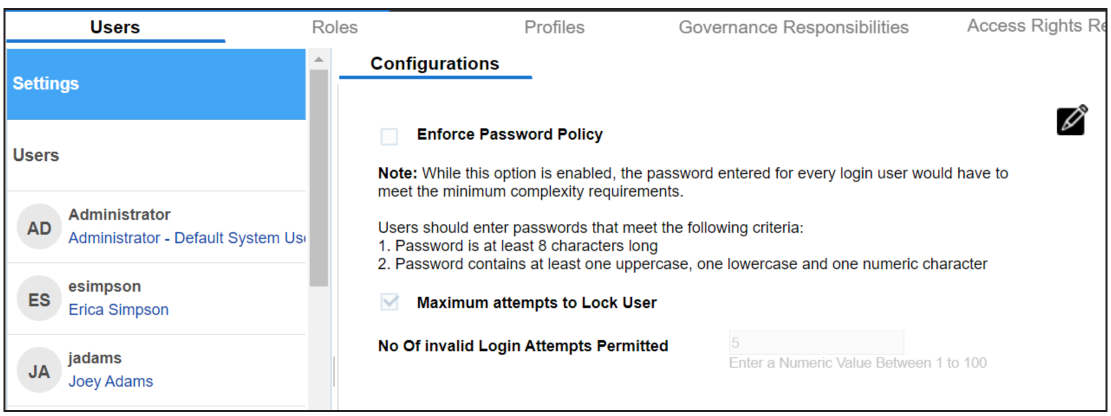
Configuring Password Settings

You can configure password settings to enforce a password policy that sets the minimum complexity requirements for user passwords. The set of rules in the password policy makes the passwords strong. You can also set maximum number of invalid logs in attempts to lock users.

To configure password settings, follow these steps:

1. On the **Users** tab, click the **Settings** section.

   By default, the Configurations tab opens.

2. Click .

3. Use the following options:

   Enforce Password Policy

   Use this option to enforce the password policy.

   Maximum attempts to Lock User

   Use this option to turn on the **No Of invalid Login Attempts Permitted** field.
   No of invalid Login Attempts Permitted: Use this option to set the maximum number of invalid logs in attempts. For example, if you set it to 5, the user gets locked after attempting 5 number of invalid logs in attempts. You can enable the locked user by using the options available under the Users section.
   For more information on enabling users, refer to the Managing Users topic.

Managing Users

Managing users involves:

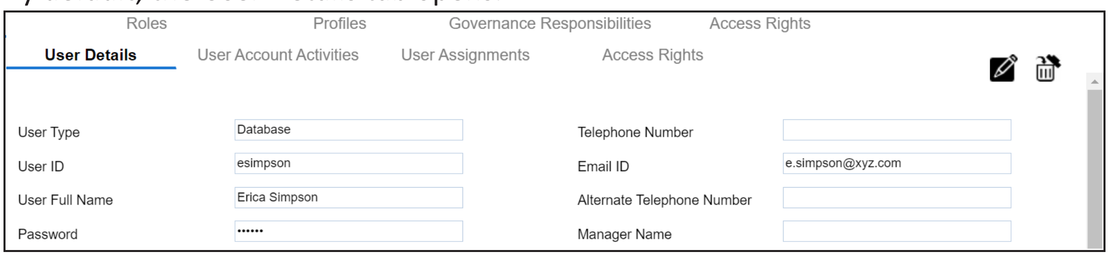
- Editing or deleting users
- Monitoring user account activities
- Viewing users activity history

Editing or Deleting

To edit or delete users, follow these steps:

1. On the **Users** tab, click a user.

   By default, the User Details tab opens.



2. Use the following options:

   Edit User ( )

   Use this option to update user details and assign new roles to the user.

   > You cannot edit the User Type, User ID and the Default Role.

   Delete User ( )

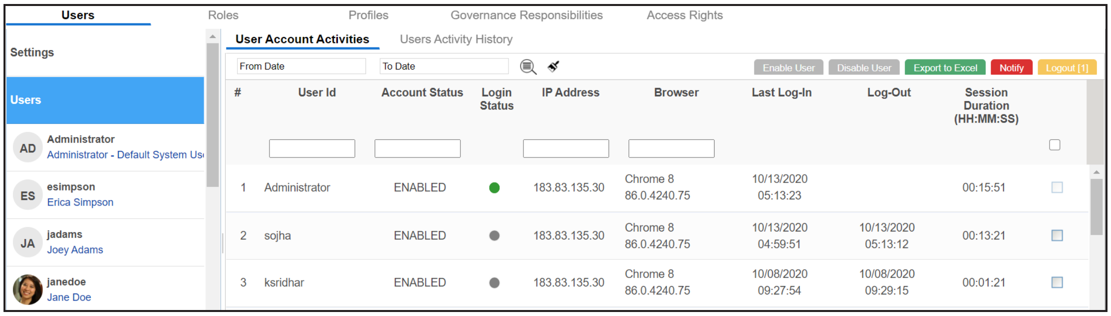
   Use this option to delete a user that is no longer required.

Monitoring User Account Activities

To monitor user account activities, follow these steps:

1. In the browser pane, click the **Users** section.

   By default, the User Account Activities tab opens. It displays the account activities of all the users.

2. Use the following options:

   Enable User

   Use this option to enable locked and disabled users. To enable users, select the required rows in the grid and click **Enable User**.

   Disable User

   Use this option to disable users. To disable users, select the required rows in the grid and click **Disable User**.

   Export to Excel

   Use this option to download the user's account activities in the XLS format.

   Notify

   Use this option to send email notifications to users.

   Logout

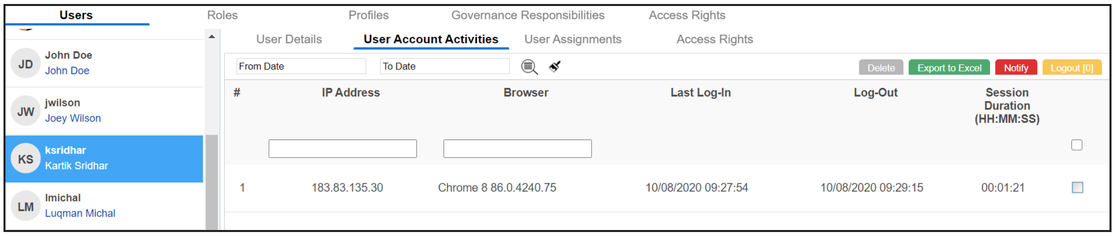
   Use this option to log out the user.

   > If the selected user is logged in then the Logout button appears like Logout[1].

You can filter the content in the grid based on the From Date and To Date. To filter the content, set dates in the **From Date** and **To Date** and then click .

To clear the search results, click .

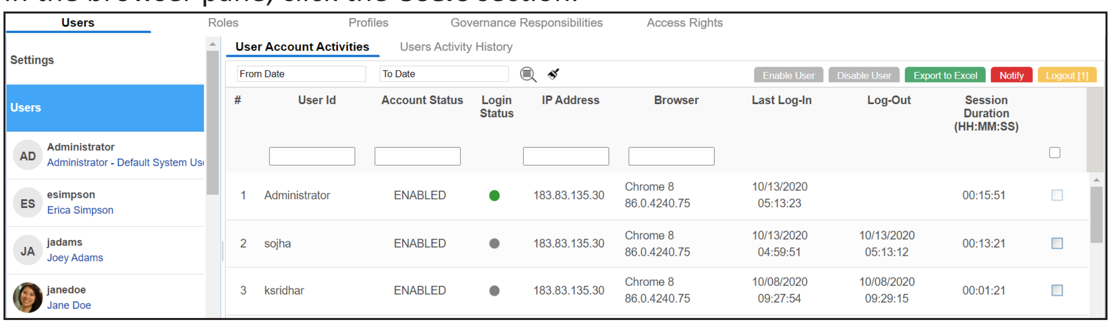
You can monitor account activities of an individual user. To monitor account activities of users individually, on the **Users** tab, click a user and then click the **User Account Activities** tab. Refer to the above descriptions for the available options on the User Account Activities tab.



Viewing Users Activity History

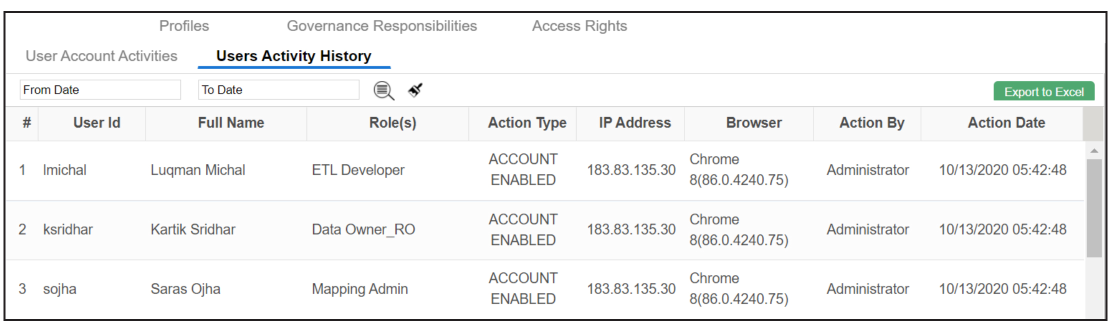
To view users activity history, follow these steps:

1. In the browser pane, click the **Users** section.



2. Click the **Users Activity History** tab.

   It displays the complete history of users activity.



You can filter the content in the grid based on the From Date and To Date. To filter the content, set dates in the **From Date** and **To Date** and then click .

To clear the search results, click .

Creating Profiles

Profiles help users to personalize:

- Mapping Specification grid in the Mapping Manager.
- Code Value Grid in the Codeset Manager.

You can create two types of profiles:

- **Site Profiles**: You can create a profile for other users by creating a site profile. Ensure that you specify the users who can access the site profile.

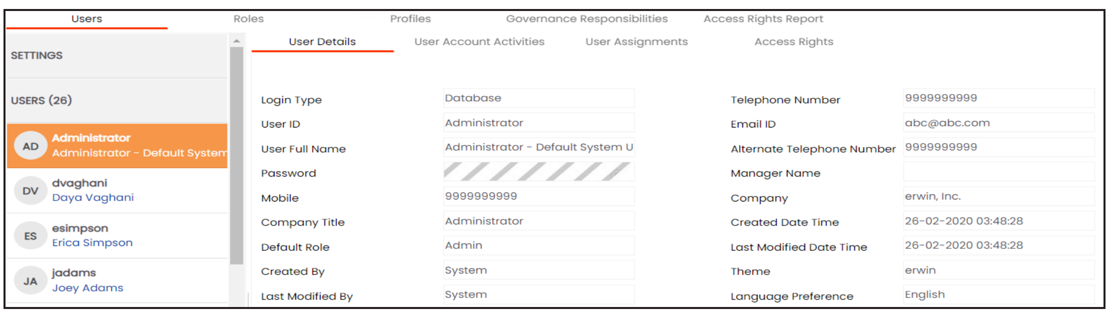
  > The Default profile is available by default as a site profile for all the users. You cannot edit or delete this profile.

- **User Profiles**: You can create a profile for yourself. A user profile created by you cannot be accessed by other users.

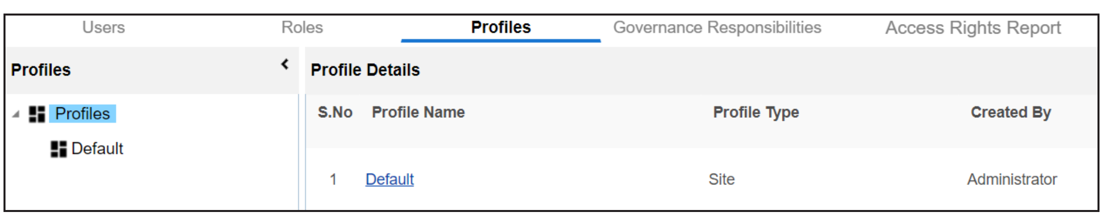
To create profiles, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Resource Manager**.

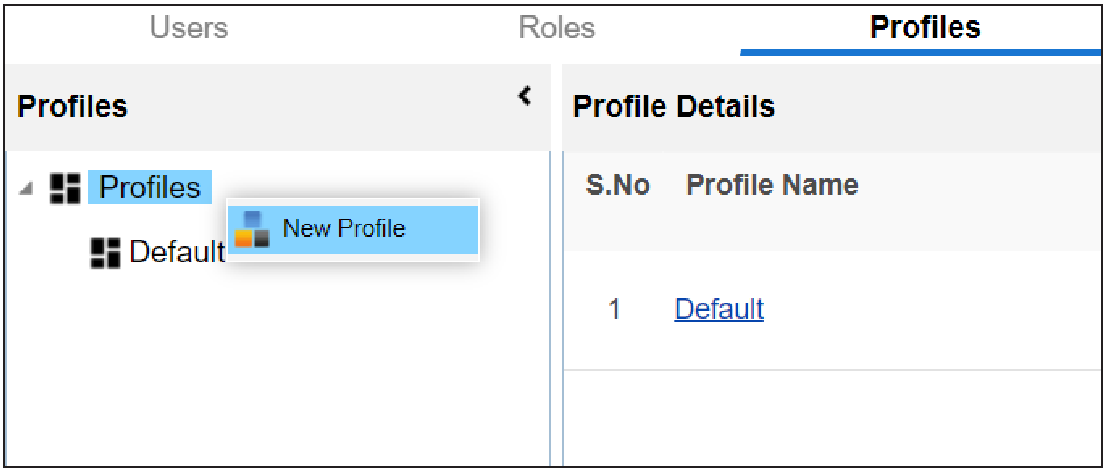
   By default, the Users tab opens.



2. Click the **Profiles** tab.

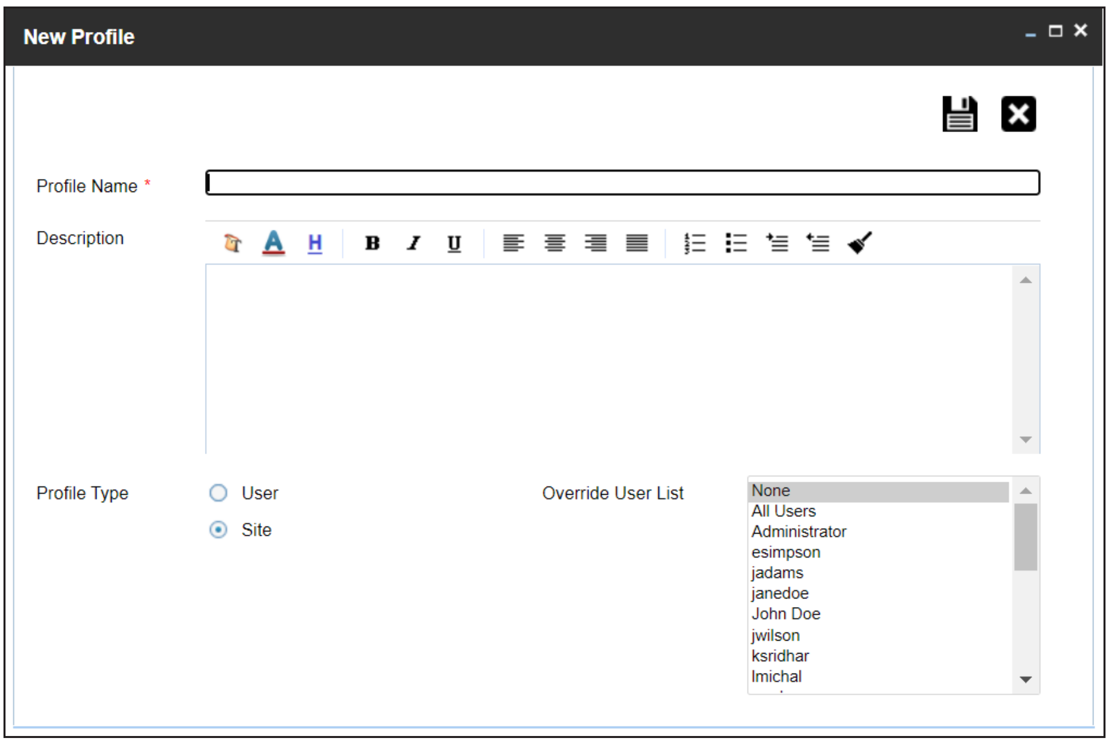


3. Right-click the **Profiles** node.



4. Click **New Profile**

   The New Profile page appears.

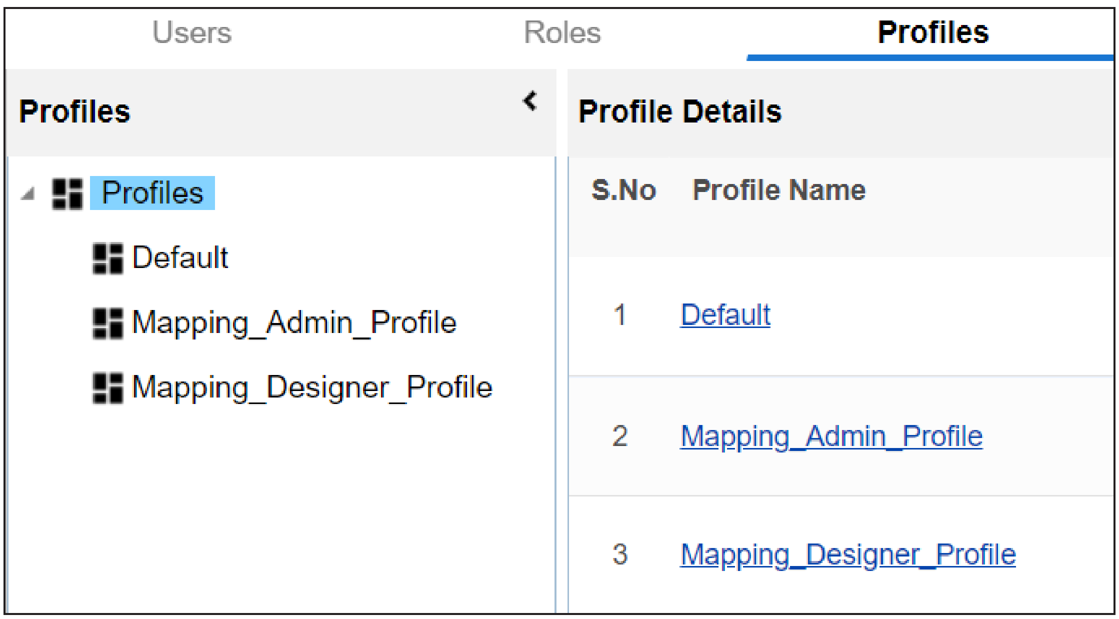


5. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Profile Name	Specifies the unique name of the profile. For example, Mapping_Admin_Profile.
Description	Specifies the description about the profile. For example: This is a site profile for mapping administrators.
Profile Type	Specifies type of the profile. ▪ To create the profile for yourself, select **User**. ▪ To create profile for other users, select **Site** and select appropriate users from the **Override User List**.

6. Click .

   A profile is created and added to the Profiles tree.



Once the profile is created, you can set the following for the profile:

- Mapping Specification grid in the Mapping Manager
- Code Value Grid in the Codeset Manager

Creating Profiles

You can also manage profiles. It involves editing or deleting profiles. For more information on managing profiles, refer to the Managing Profiles topic.

Setting Mapping Specification Grids

You can set the Mapping Specification grid for a profile with respect to:

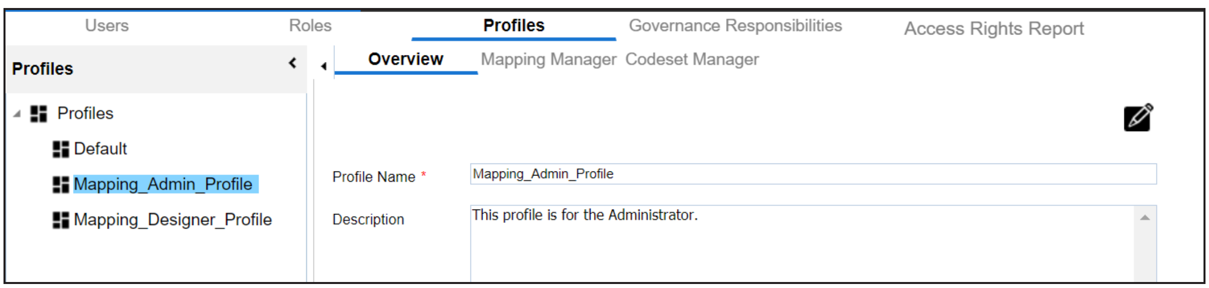
- Column order
- Column visibility
- Header Menu

You can also define the project scope of the profile.

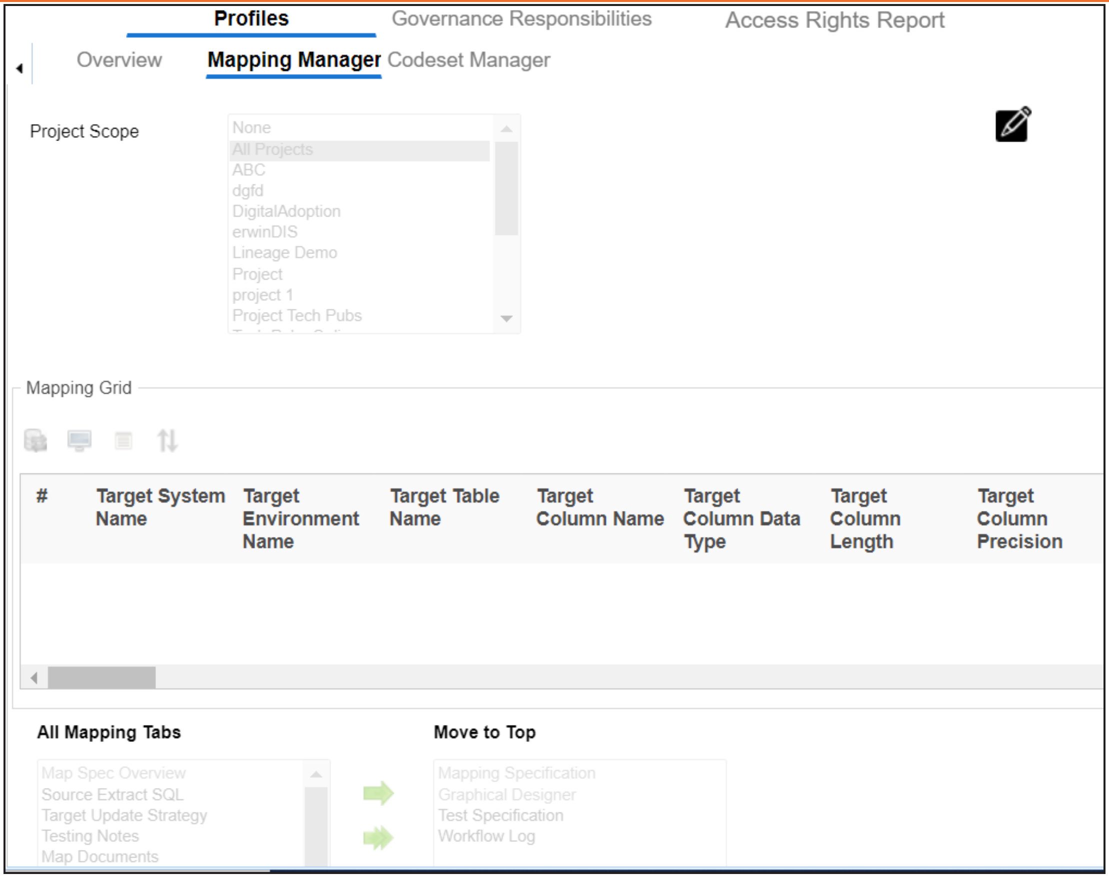
To set Mapping Specification grids, follow these steps:

1. In the **Profiles** pane, click a profile.

   By default, the Overview tab opens.



2. Click the **Mapping Manager** tab.



3. Click .
4. Use the following options:

Project Scope

Use this option to specify the projects to which the profile can be used. For example, if the project scope is **All Projects** then the profile can be used to view all the projects in the Mapping Manager. To select multiple projects, use the Ctrl key.

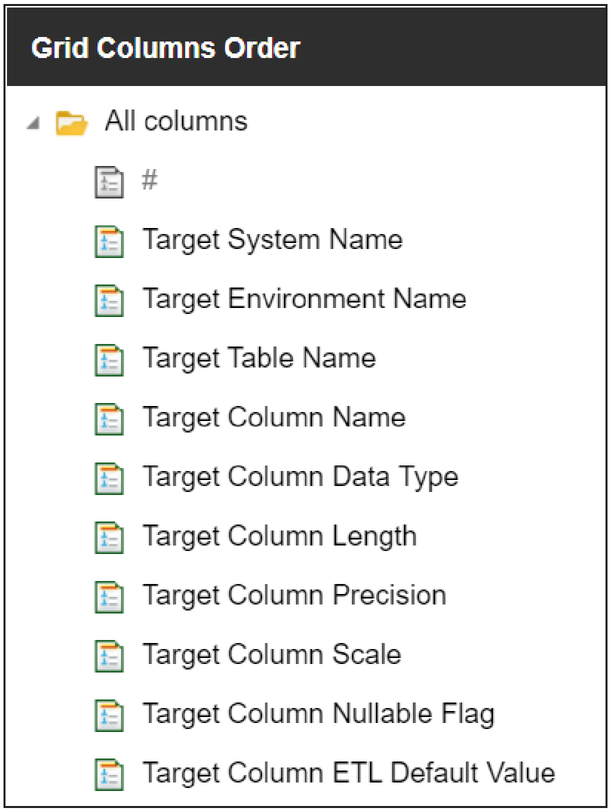
Mapping Grid

Use the following options under this section to set the columns and header menu:

Change Column Order ()

Use this option to set the columns order.

To change the column order, click . The Grid Columns Order page appears.

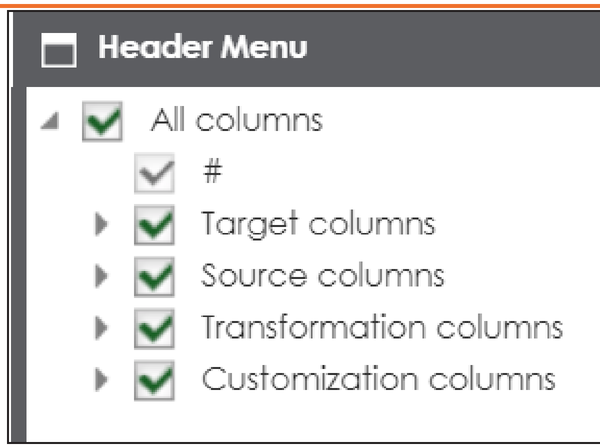


Drag and drop the columns in the required order.

Header Menu ()

Use this option to set the columns visible in the header menu.

To set the columns visible, click and select the required columns.



Reset Column Ordering ( )

Use this option to reset the column order.

Reset Column Visibility ( )

Use this option to reset the column visibility.

Move to Top

The mapping tabs present in **Move to Top** box appears on top of the mapping grid.

To move mapping tabs from **All Mapping Tabs** to **Move to Top** box, use (or).

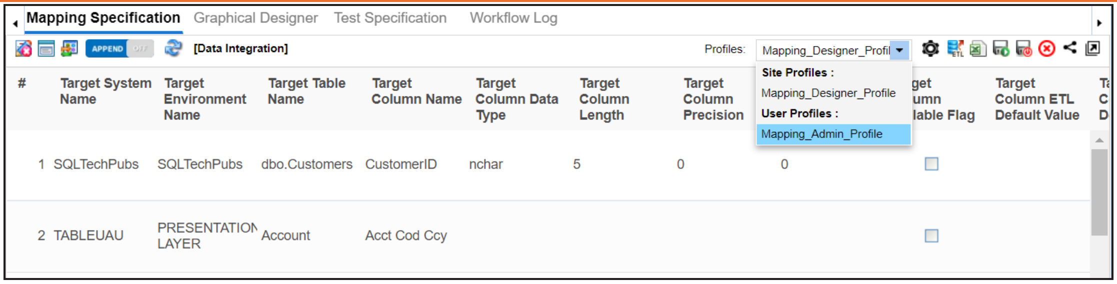
To move mapping tabs from **Move to Top** box to **All Mapping Tabs** box, use (or) .

5. Click .

The Mapping Specification grid is set for the profile.

The user can choose a profile in the Mapping Manager to view the Mapping Specification grid.

Setting Mapping Specification Grids



Setting Code Value Grids

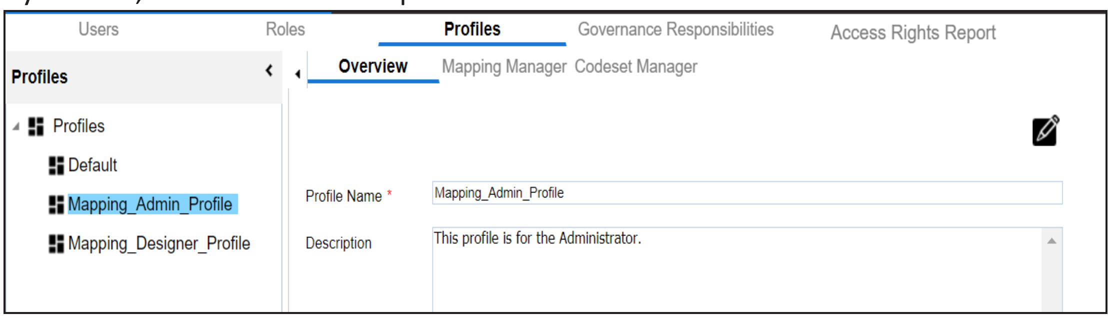
You can set Code Value Grid for a profile with respect to:

- Header menu
- Column order
- Column visibility

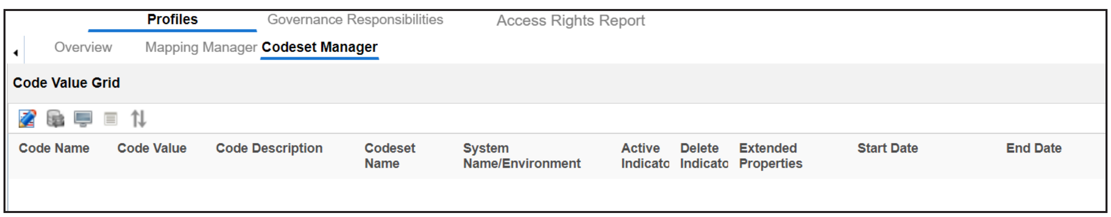
To set Code Value Grids, follow these steps:

1. In the **Profiles** pane, click a profile.

   By default, the Overview tab opens.



2. Click the **Codeset Manager** tab.

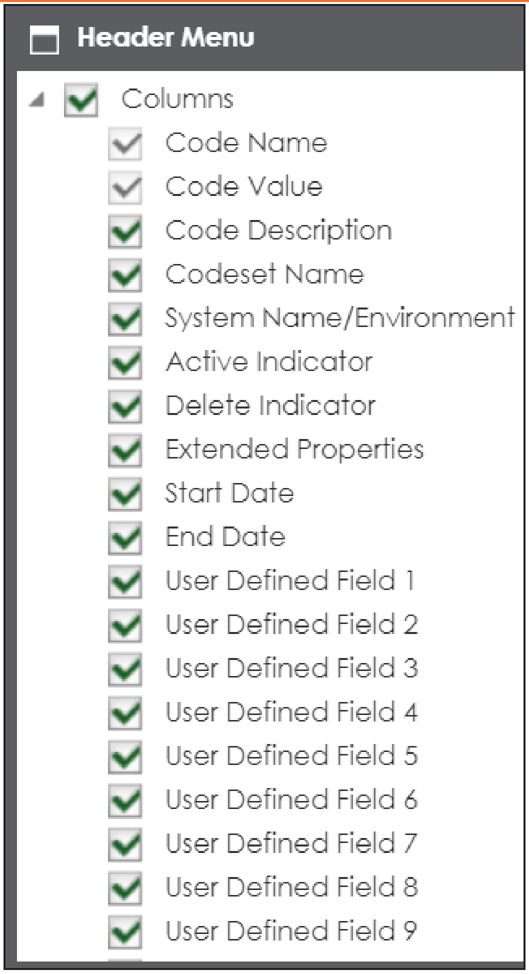


3. Click .
4. Use the following options:

   Header Menu ()

   Use this option to set the column visibility in the header menu.

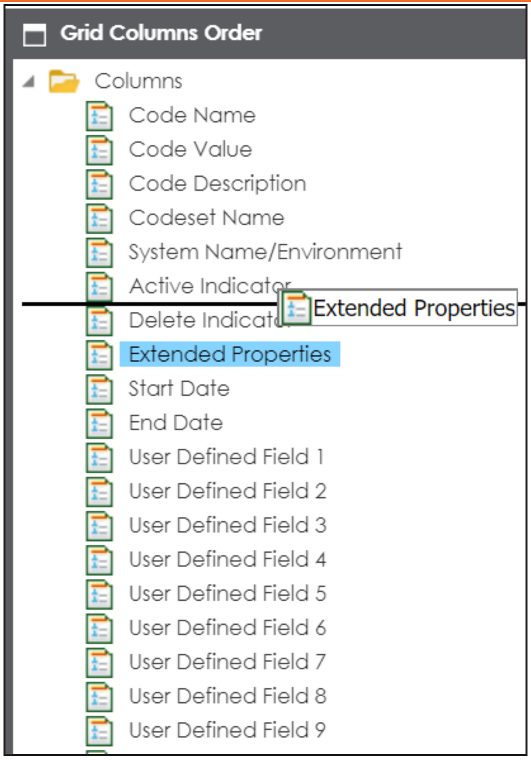
   To set the column visiblity, click and select the required columns.



Change Column Order ( )

Use this option to set the column order.

To set the column order, click and then drag and drop the columns in the required order.



Reset Column Ordering ( )

Use this option to reset the column order.

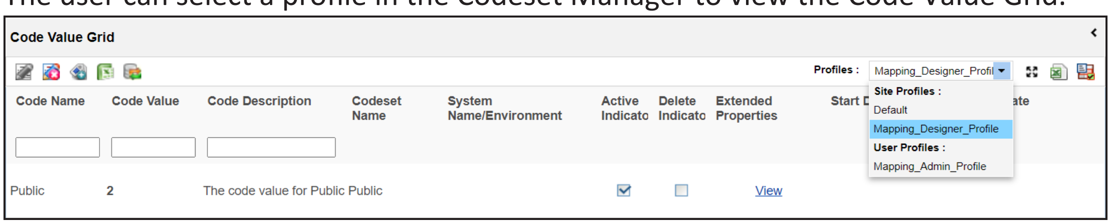
Reset Column Visibility ( )

Use this option to reset the column visibility.

5. Click .

The Code Value Grid is set for the profile.

The user can select a profile in the Codeset Manager to view the Code Value Grid.



Managing Profiles

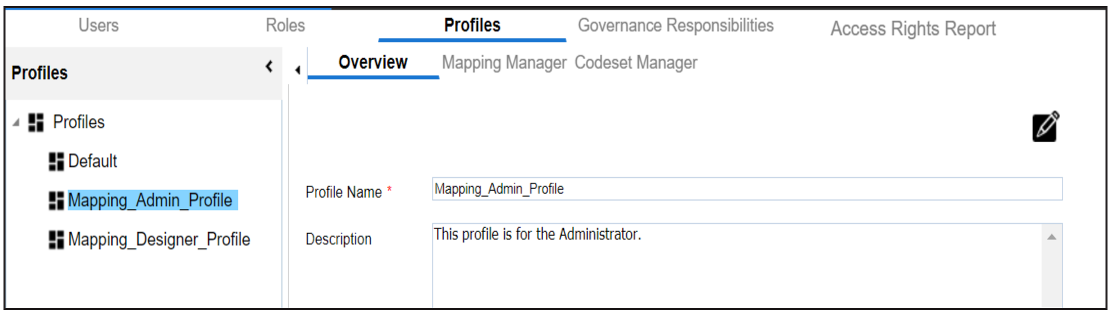
Managing Profiles involves:

- Editing
- Deleting

To edit a profile, follow these steps:

1. In the **Profiles** pane, click a profile.

   The Overview tab opens.

2. Click .

   You can update the profile.

3. Click .

   The profile is updated.

To delete profiles, in the **Profiles** pane, right-click a profile and click **Delete Profile(s)**.

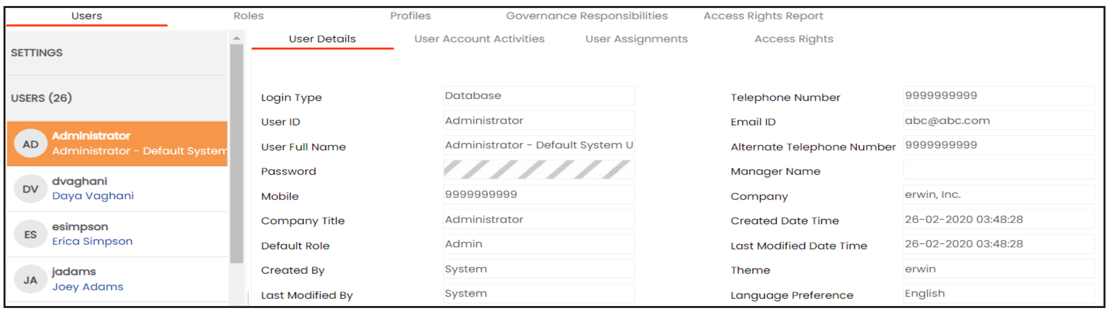
Viewing Access Rights Report

The Access Rights Report tab displays the roles and users 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.

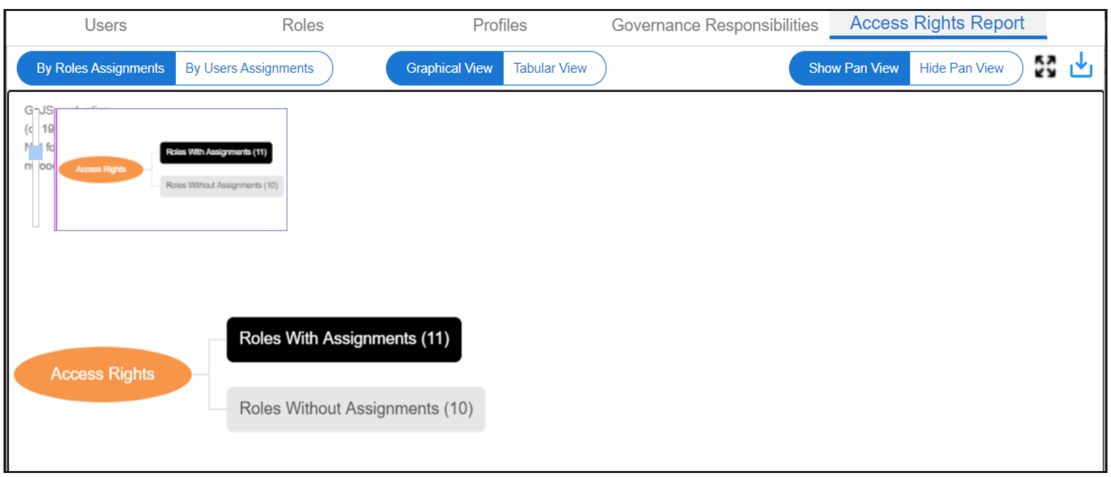
To view access rights, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Resource Manager**.

   By default, the Users tab opens.

2. Click the **Access Rights Report** tab.

3. Use the following options:

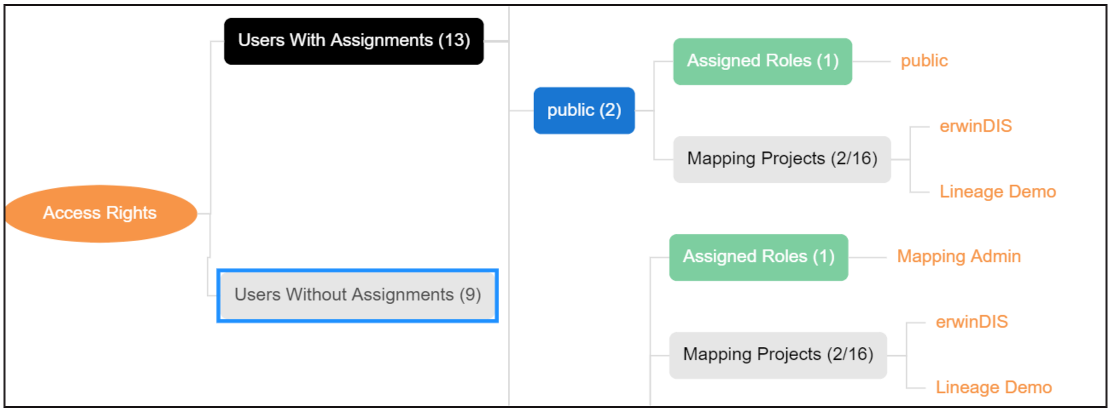
   By Roles Assignments/By Users Assignments

Use this option to switch between the roles and users 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:

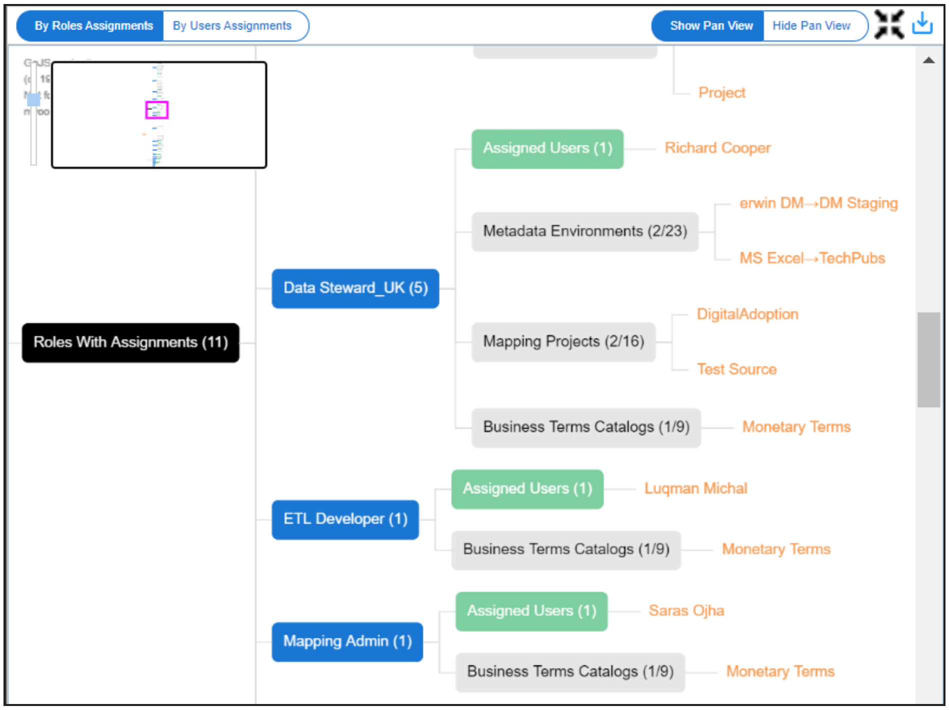
- **Show Pan View/Hide Pan View**

  Use this option to show or hide pan view. The pan view facilitates in navigating 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**

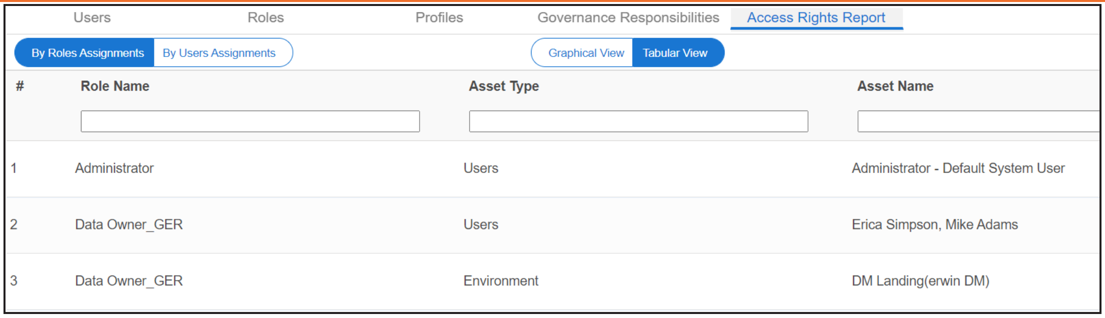
  Use this option to expand the assignment tree at node level. Hover over a node and click the plus (+) icon.

- **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.

Viewing Access Rights Report



#	Role Name	Asset Type	Asset Name
1	Administrator	Users	Administrator - Default System User
2	Data Owner_GER	Users	Erica Simpson, Mike Adams
3	Data Owner_GER	Environment	DM Landing(erwin DM)

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

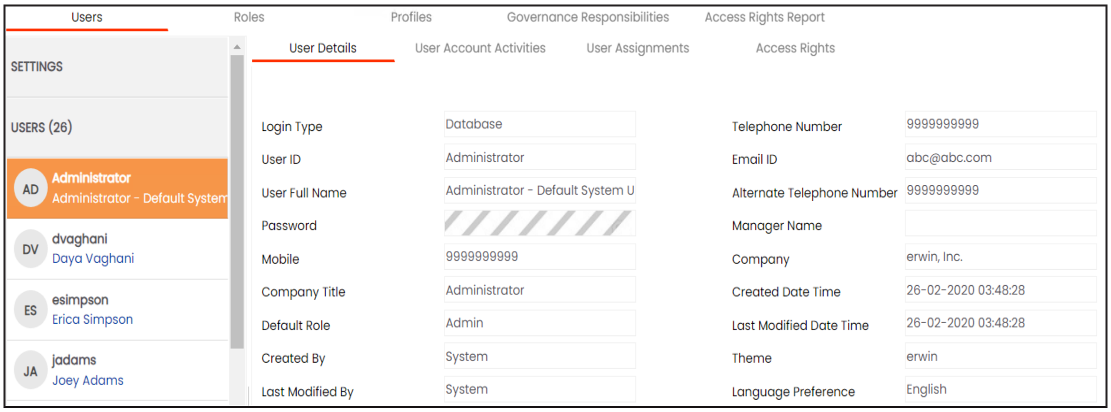
Creating Roles Group

Data governance plan in your organization may require new roles groups to accommodate governance responsibilities. You can create roles groups and group roles based on the governance responsibilities in your organization.

To create roles groups, follow these steps:

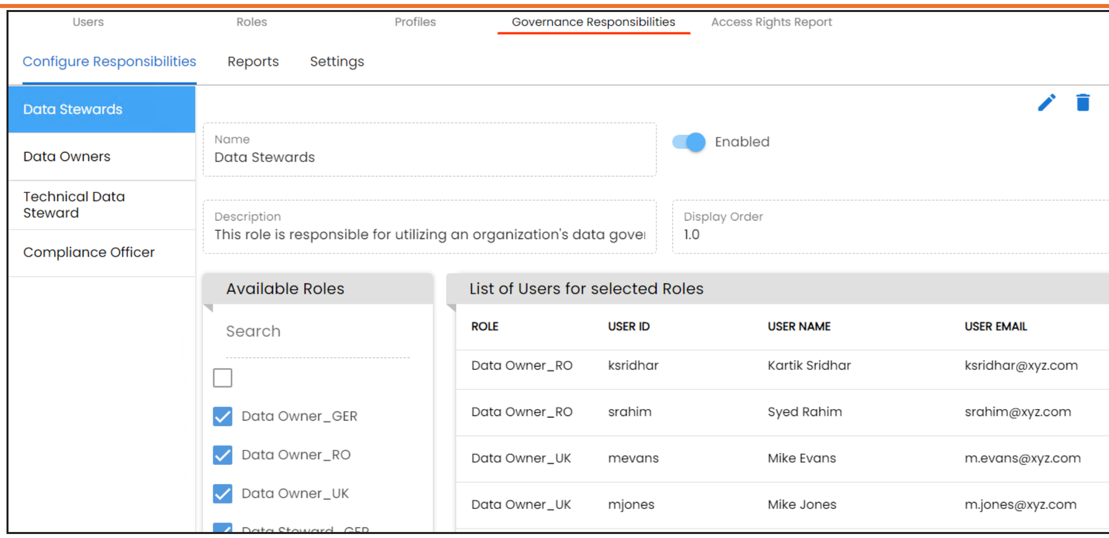
1. Go to **Application Menu** > **Data Catalog** > **Resource Manager**.

   By default, the Users tab opens.

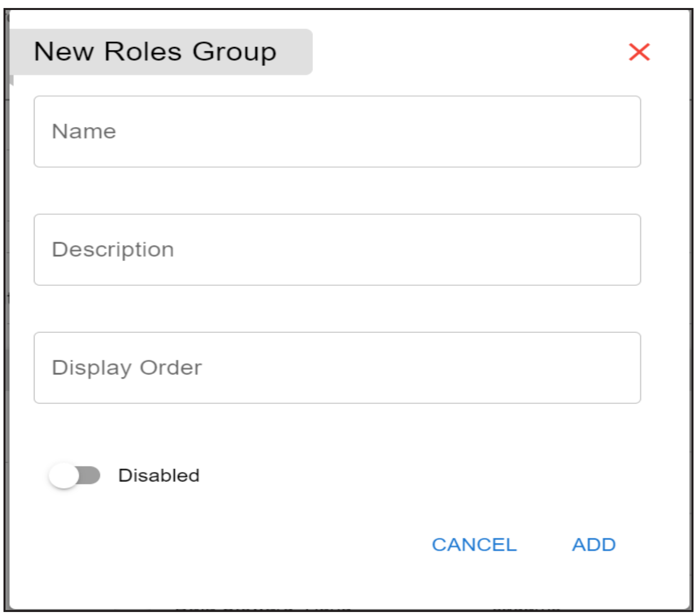
2. Click the **Governance Responsibilities** tab.

   By default, the Configure Responsibilities tab opens.



3. Click ⊕.

   The New Roles Group 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 roles group. For example, Data Owner.
Description	Specifies the description of the roles group. For example: Roles in this group are accountable for who has access to information to assets in their functional areas.
Display Order	Specifies the order of the roles group in the roles group list. For example, 2.0.
Disabled or Enabled	Specifies whether the roles group is enabled.

5. Click **Add**.

   The roles group is created and added to the roles group list.

Once a roles group is created, you can assign roles and users to catalogs in the Business Glossary Manager and assign governance responsibilities for the business assets.

You can also manage roles groups and view governance responsibilities reports.

Managing roles group involves:

- Editing roles group
- Deleting roles group

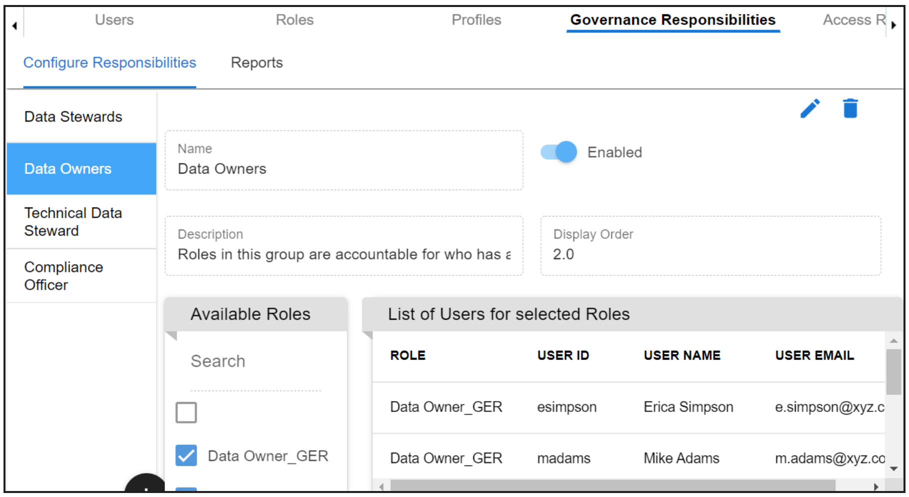
Managing Roles Group

Managing roles group involves:

- Editing roles group
- Deleting roles group

To manage roles group, follow these steps:

1. On the **Configure Responsibilities** tab, click a roles group.



2. Use the following options:

Edit ( )

Use this option to update a roles group. You can update name, description, list of selected roles, and enable or disable the roles group.

Delete ( )

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

Viewing Reports

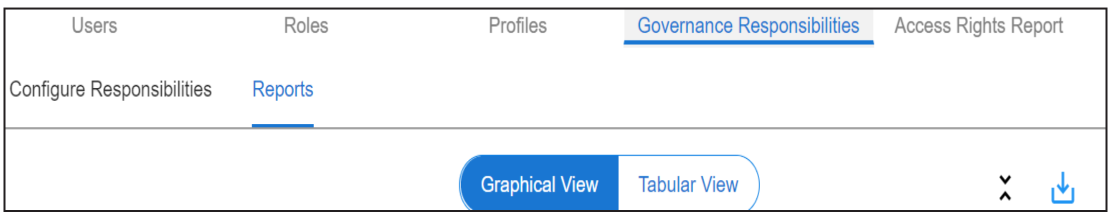
A successful data governance program demands an efficient grouping of roles based on the responsibilities. It is also important to assign appropriate users and roles to catalogs and then assign governance responsibilities to business assets. The governance responsibilities report helps you track assignment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

To view reports, on the **Governance Responsibilities** tab, click the **Reports** tab.

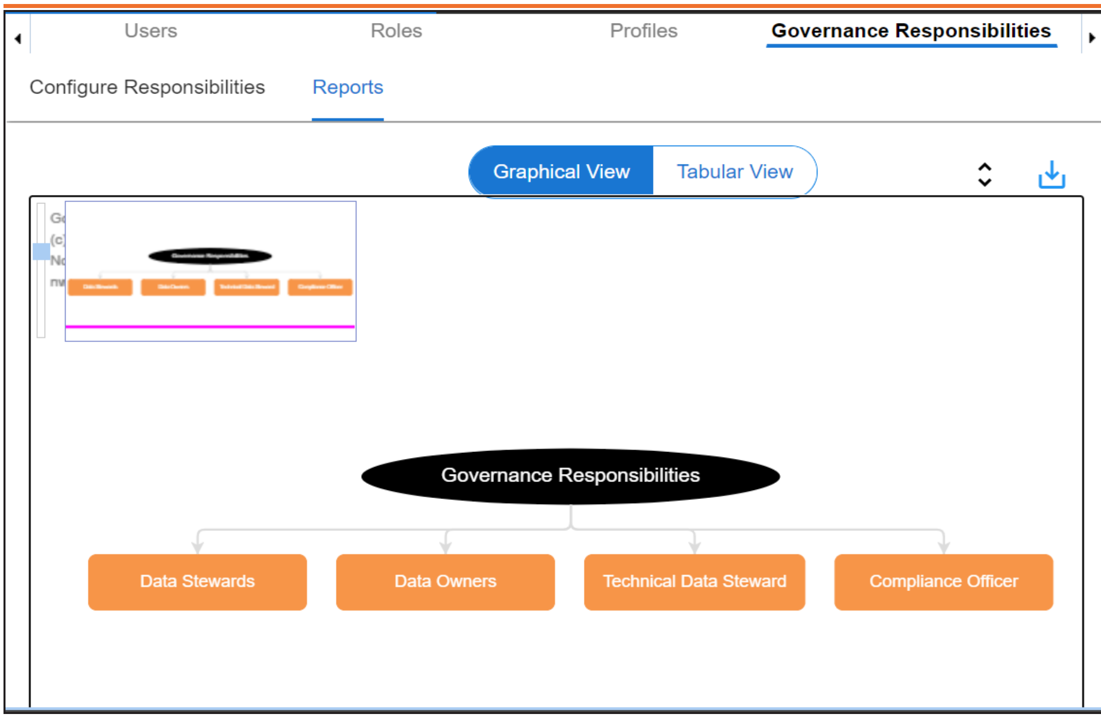
Use the following two views to view reports:

- **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.

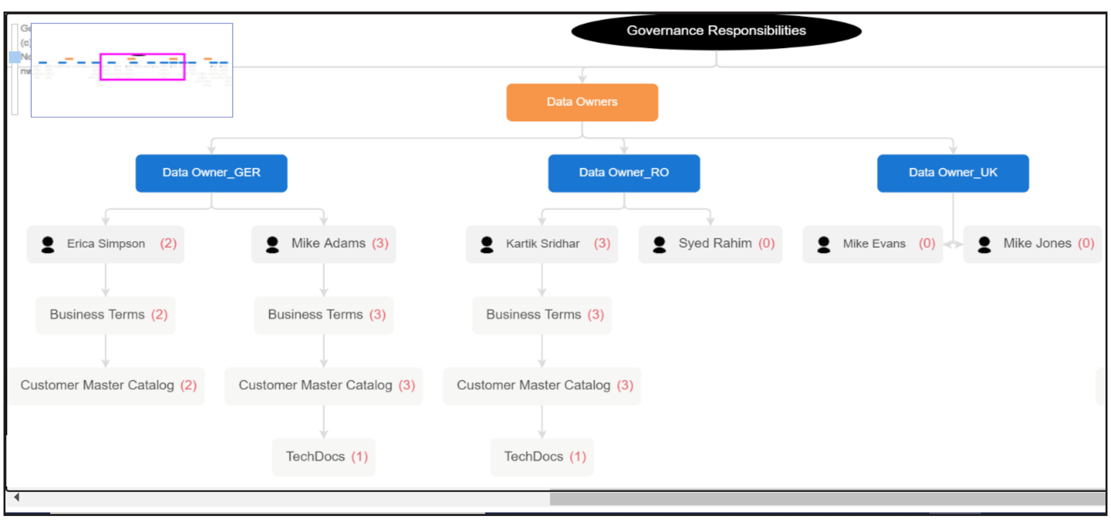


To view report details in the graphical view, use the following options:



- **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.



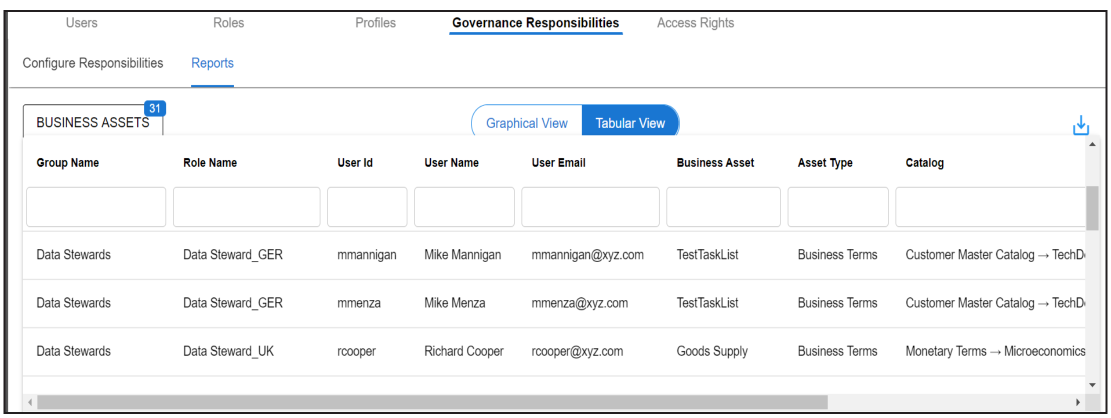
- **Pan View**

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.



Group Name	Role Name	User Id	User Name	User Email	Business Asset	Asset Type	Catalog
Data Stewards	Data Steward_GER	mmannigan	Mike Mannigan	mmannigan@xyz.com	TestTaskList	Business Terms	Customer Master Catalog → TechD
Data Stewards	Data Steward_GER	mmenza	Mike Menza	mmenza@xyz.com	TestTaskList	Business Terms	Customer Master Catalog → TechD
Data Stewards	Data Steward_UK	rcooper	Richard Cooper	rcooper@xyz.com	Goods Supply	Business Terms	Monetary Terms → Microeconomics

To download the report in the XLSX format, click .