

GUIDE

Quest Data Intelligence

Enterprise Tags Guide 16.0



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Enterprise Tag Groups

Enterprise Tag Groups introduces a structured approach to organizing and governing tags across the platform. It replaces the earlier flat tag model with a group-based tagging framework, enabling better consistency, control, and discoverability of metadata.



Note: The Enterprise Tags module has been renamed to Enterprise Tag Groups in Quest Data Intelligence 16.0, reflecting the enhanced governance and organizational capabilities of this feature.

Previously, all tags existed in an unstructured, flat format, which resulted in:

- Inconsistent tag naming and usage
- Difficulty managing large numbers of tags
- Uncontrolled tag creation by end users
- Limited visibility into tag associations

Tag Groups solve these challenges by organizing tags into logical categories while providing administrators control over tag creation, assignment, and usage across your organization.

Accessing Tag Groups

To access Enterprise Tag Groups, go to **Application Menu > Miscellaneous > Enterprise Tag Groups**.

Here's what the Enterprise Tag Groups page looks like:

Enterprise Tags

The screenshot displays the Enterprise Tags management interface. It is divided into three main sections:

- Section 1 (Tag Groups):** A sidebar on the left with a search bar and a list of tag groups. The 'Domains' group is selected.
- Section 2 (Tag Group Management):** A top panel for the 'Domains' group. It shows the group name, description, visibility (All), display order (1), and configuration options for Publish, Multi Select, and Master Enforced.
- Section 3 (Tags Management):** A table listing tags for the 'Domains' group. The table has columns for #, Name, Description, Associations, Publish, Scope, and Options. It shows four tags: Customer, Finance, Sales, and Marketing.

#	Name	Description	Associations	Publish	Scope	Options
1	Customer				All	
2	Finance				All	
3	Sales				All	
4	Marketing				All	

Tag Group Configuration

The Enterprise Tag Groups page displays all available tag groups and provides options to manage them. The following table describes each section available on the page:

UI Section	Function
1 - Tag Groups Listing and Creation	Use this section to view a list of all tag groups, search for tag groups, create new tag groups and configure their properties including name, multi-select settings, and visibility options.
2 - Tag Group Management	Use this section to manage the selected tag group. You can view tag group details, edit configurations, delete tag group, and view its history. This section also displays the publishing status and other metadata for each tag group.
3 - Tags Management Within Group	Use this section to add, edit, or remove individual tags within a selected tag group. You can also use the Mind map option to organize and view tag relationships.

Default Tag Groups

Quest Data Intelligence includes two default tag groups:

Enterprise Tags

- **Domain** - Contains tags that represent business domains such as Customer, Finance, Sales, and Marketing. You can add additional domain tags as needed.
- **Tags** - Contains all previously created tags. This group provides backward compatibility with existing tag implementations.

Key Capabilities

To manage tag groups effectively, you need to understand these key concepts:

Publishing

Publishing determines whether a tag group is visible and available to other users in your organization.

- **Published/Switched On:** All users with appropriate permissions can see and use the tag group for tagging assets across all relevant interfaces.
- **Draft/Switched Off:** The tag group exists but is hidden from other users. Only the creator can view and edit it. Use draft mode to create and test new tag groups before publishing them.

Multi-Select

Multi-Select controls whether users can assign multiple tags from the same tag group to a single asset.

- **Switched On:** Users can select and assign multiple tags from this group to the same asset.
- **Switched Off:** Users can select only one tag from this group per asset. Attempting to add a second tag will replace the first one.



Note: The multi-select setting applies to the entire tag group, not to individual tags. All tags within a group follow the same behavior.

Master Enforced

Master Enforced determines whether users can create new tags on-the-fly or must select only from predefined tags in the master tag list.

Master Enforced: OFF	Master Enforced: ON
Users can type any tag name directly into the tagging field	Users must select from predefined tags in the tag group
New tags are automatically created in the master and assigned to the asset	Users cannot create new tags
Dropdown list grows dynamically as users create new tags	Dropdown list remains static, containing only master-defined tags
Useful for flexible, organic tag organization	Ensures consistency and prevents tag sprawl

Visibility

Visibility settings control where a tag group appears in the system for tagging assets. You can select one or more visibility options, depending on where you want users to be able to apply tags.

For more information on creating enterprise tags, refer to the [Creating Enterprise Tag Groups](#) topic.

Creating Enterprise Tag Groups and Tags

In Quest Data Intelligence 16.0, the tagging system now uses tag groups to organize tags into meaningful categories with governance controls. Unlike the earlier flat structure, Tag Groups let you organize tags by purpose and control how they're created and used across your organization.

Understanding Tag Groups and Tags Relationship

Before creating tags, understand the relationship between tag groups and tags:

Element	Purpose	Created By
Tag Group	Organizes related tags and defines governance policies including publishing status, multi-select capabilities, master enforcement, and visibility settings.	Administrators and Data Stewards
Tag	Individual tags assigned to assets within a specific tag group	Administrators, Data Stewards, or Business Users (depending on Master Enforced setting)

This topic covers two workflows: creating tag groups and adding tags to them.

Creating a Tag Group


Tag Groups are containers that organize related tags and define their behavior. You must create a tag group before adding individual tags to it.

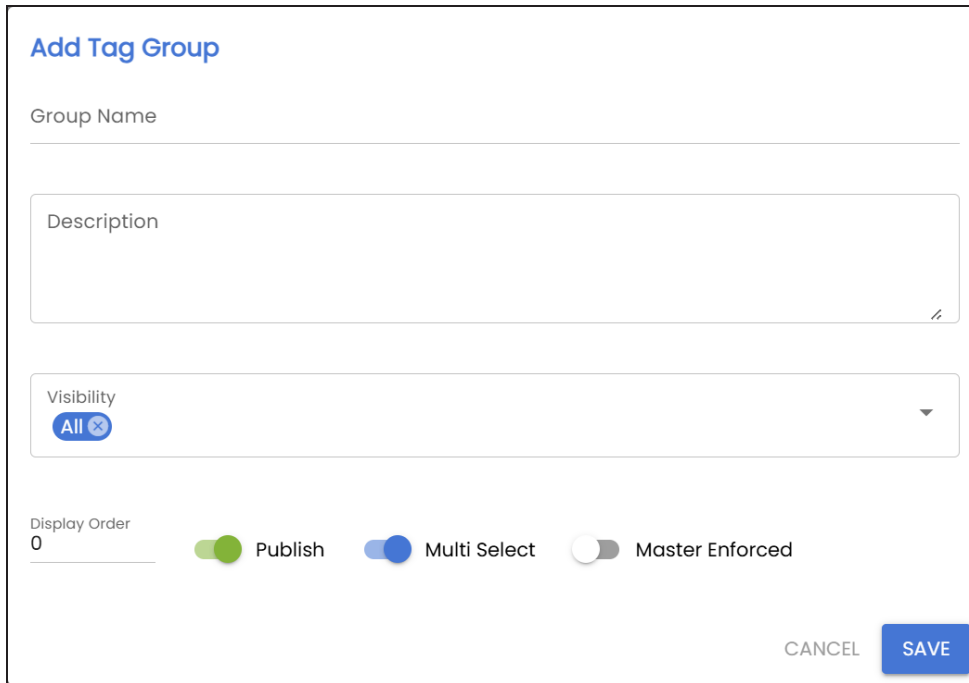
Prerequisites

- Ensure your user role is Administrator or Data Steward.
- Clear understanding of your tag group's purpose and visibility requirements.
- Define a naming convention for tags within the group.

To Create a Tag Group

1. Go to **Application Menu > Miscellaneous > Enterprise Tag Groups**.

2. Select  from the Tag Groups pane. The Add Tag Group screen opens.



3. In the Add Tag Group screen, enter a descriptive name for your tag group. For example, Data Quality Classification.
4. (Optional) Enter a description that explains the purpose of this tag group.
5. Configure the following settings:
 - **Publish:** Switch on the toggle to publish the tag group and make it available to users immediately, or switch off to keep it as a draft.
 - **Multi Select:** Switch on the toggle to allow users to assign multiple tags from this group to a single asset, or switch off to allow users to assign only one tag

Creating Enterprise Tag Groups and Tags

from this group per asset.

- **Master Enforced:** Switch on the toggle to restrict users to select only pre-defined tags from the tag group list or switch off to enable users to type custom tag names directly into the field and create new tags on-the-fly.

You can also manage these settings later in the Enterprise Tag Groups page.

6. Under **Visibility**, select the options to specify where this tag group appears for tagging.

Tip: You can select one or more visibility options based on where you want users to apply tags from this group.


7. Select **Save** to create the tag group.

After creating the tag group, you can add individual tags to it.

Creating Tags Within a Tag Group

After creating a tag group, add individual tags that users can apply to assets. The process for creating tags is consistent across tag groups, but the available configuration options vary depending on the tag group's settings.

To Add a Tag to a Tag Group

1. Go to **Application Menu > Miscellaneous > Enterprise Tag Groups**.
2. From the Tag Groups pane, select the tag group to which you want to add tags.
3. Select  from the tag listings pane. The Add Tag screen opens.

Creating Enterprise Tag Groups and Tags

The screenshot shows a form titled "Add Tag" with the following fields and controls:

- Name:** A text input field with a blue underline.
- Description:** A larger text area with a small icon in the bottom right corner.
- Scope:** A dropdown menu currently showing "All" with a globe icon.
- Display Order:** A numeric input field with the value "0".
- Publish:** A toggle switch that is currently turned on (green).
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom right.

4. Enter the tag name in the provided field. For example, Quality Check and Data Completeness.
5. (Optional) Enter a description that explains the meaning, usage, and context of this tag.
6. Configure the following settings:
 - **Publish:** Switch on the toggle to immediately make the tag available for users to apply to assets or switch off to make it available only to the creator and keep it as a draft.
 - **Scope:** Select the assets to specify the scope of applying the tag.
7. Select **Save** to add the tag to the tags listing.

Your tag is ready. Users can now assign it to assets based on visibility settings. For more information on assigning tags to the assets, see [Tagging Business Assets](#).

You can manage an enterprise tag using the options available under the Options column. [Managing Enterprise Tags](#) lets you:

Creating Enterprise Tag Groups and Tags

- View mind maps
- Edit enterprise tags
- Delete enterprise tags
- View history

Best Practices for Tag Creation

- **Use Consistent Naming Conventions:** Apply a standard naming format across your tag group (for example, lowercase with underscores: pii_data, sensitive_content).
- **Keep Tag Count Manageable** — Limit the number of tags in each tag group for usability. Too many tags make selection difficult for users.
- **Provide Clear Descriptions** — Write descriptions that explain when and why to use each tag.
- **Start in Draft** — Create tags in draft status, validate their use, and then publish them.
- **Review Before Publishing** — Ensure tag group settings (Master Enforced, Multi-Select) align with your organizational governance requirements before publishing.

Managing Enterprise Tags

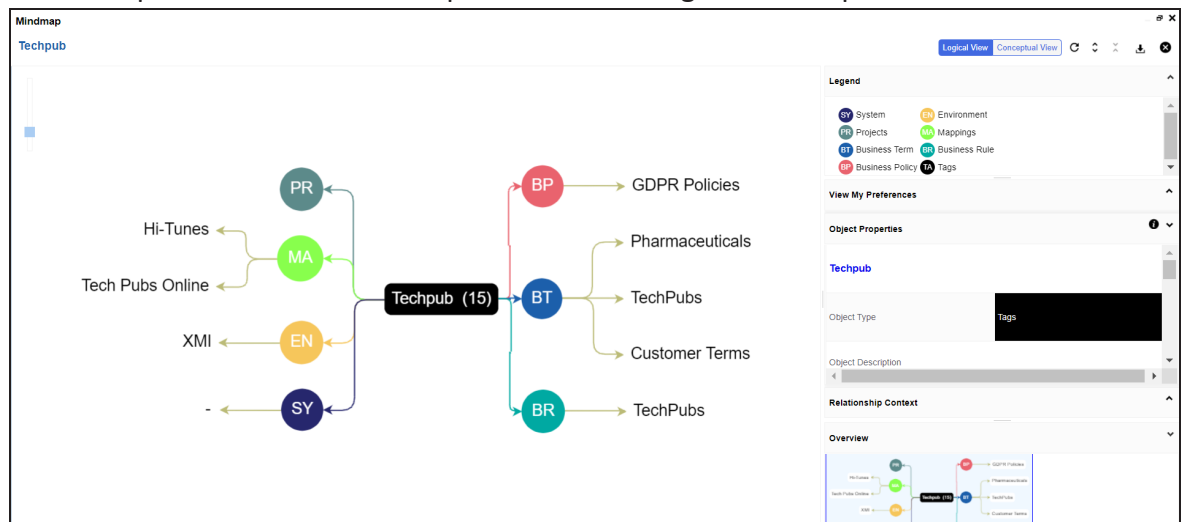
You can manage enterprise tags by using these options:

- View mind maps: Visualize tag relationships and associations
- Edit enterprise tags: Modify tag properties and settings
- Delete enterprise tags: Remove tags no longer needed
- View history: Track changes and audit history

From the tags listing section, use the following options in the Options column to manage tags:

View Mind Map





Use this option to view a visual representation of tag relationships and associations.



The mind map shows:

- Which assets are tagged with the selected tag
- Related tags in the same group
- Tag usage patterns across the system

You can use the following options to work on the mind map:

- **Reload Diagram** () : Reloads the mind map.
- **Expand Diagram** () : Expands the mind map to view the associated assets.
- **Reset Diagram to Original View** () : Collapses the expanded nodes and restores the mind map to its original form.
- **Export** () : Exports the mind map. Hover over **Export** and use the following options:
 - **Mind Map - Excel Report**: Downloads the mind map in the XLSX format. Ensure that you expand the mind map before downloading the report.
 - **Mind Map - Image**: Downloads the mind map as an image, in JPG format. Ensure that you expand the mind map before downloading the mind map image.
 - **Sensitivity Details - Excel Report**: Downloads 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.
For more information on mind maps, refer to the [Viewing Mind Maps](#) topic.

Edit ()

Use this option to enrich an existing enterprise tag by updating it through the Edit Tag screen.

Delete ()

Use this option to delete an enterprise tag that is no longer required.



View History ()


Use this option to view the action log and review all changes made to the tag since its creation.

Tagging Business Assets

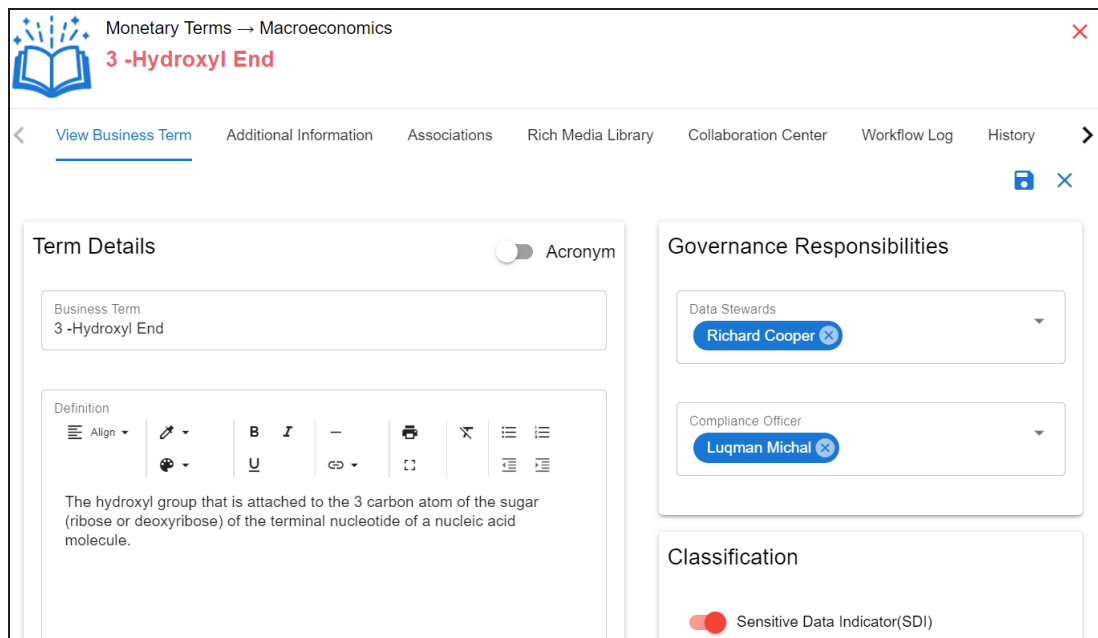
You can assign one or multiple enterprise tags to a business asset.

To tag a business asset (for example, a business term), follow these steps:

1. Go to **Application Menu > Data Governance > Business Glossary Manager > Explore**.
2. Select **Business Terms** tab, then select the Business Terms card from the workspace. The view changes to the business terms summary.
3. On the **Compact View** tab, select  >  next to the business term to make changes.

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

The **View Business Term** screen opens in edit mode.



Monetary Terms → Macroeconomics


























3 -Hydroxyl End

[View Business Term](#) Additional Information Associations Rich Media Library Collaboration Center Workflow Log History

Term Details ☐ Acronym

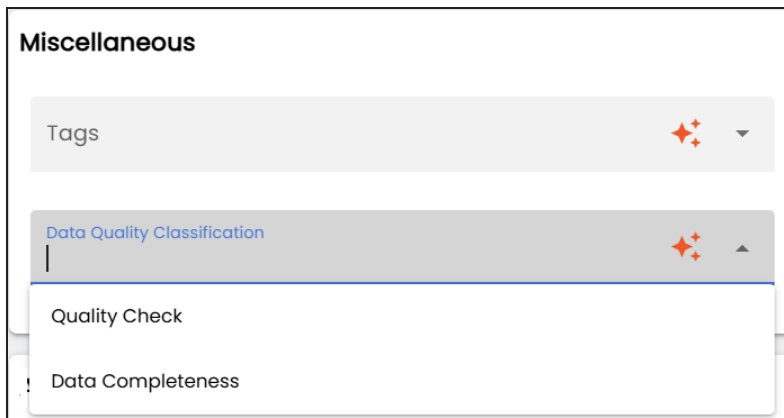
Business Term
3 -Hydroxyl End

Definition

Tagging Business Assets

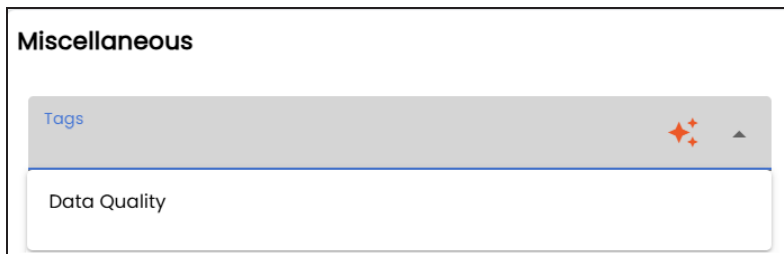
You can also select multiple tags from the dropdown only if the Multi Select is enabled for the respective tag group.



The screenshot shows a user interface for tagging business assets. Under the 'Miscellaneous' section, there is a 'Tags' dropdown menu. The dropdown is open, showing a list of suggestions: 'Data Quality Classification', 'Quality Check', and 'Data Completeness'. The 'Tags' label is on the left, and there are three orange star icons on the right. The dropdown menu is white with a blue border.

5. (Optional) Under the **Miscellaneous** section, select a tag from the Tags dropdown suggestions. For example, Data Quality.

You can also select multiple tags from the dropdown only if the Multi Select is enabled for the respective tag group.



The screenshot shows the same 'Miscellaneous' section, but now the 'Tags' dropdown menu is closed, and the suggestion 'Data Quality' is visible in the dropdown area. The 'Tags' label is on the left, and there are three orange star icons on the right.

You can create an enterprise tag by typing it in the available tag drop-downs and pressing Enter. However, this depends on the Master Enforced Option set for the corresponding tag group.



- If Master Enforced is disabled or switched off: You can type a custom tag name directly into the field and press Enter to create and assign a new tag. This new tag gets automatically added to the group's master list.

Tagging Business Assets



- If Master Enforced is enabled or switched on: You can only select from the predefined list; typing custom values will not create new tags.

6. Select .

The tags are now assigned to the business asset.

You can use the same process to tag business policies, business rules, and other business assets.