



erwin Data Intelligence

Discover Assets Guide

Release v14.0



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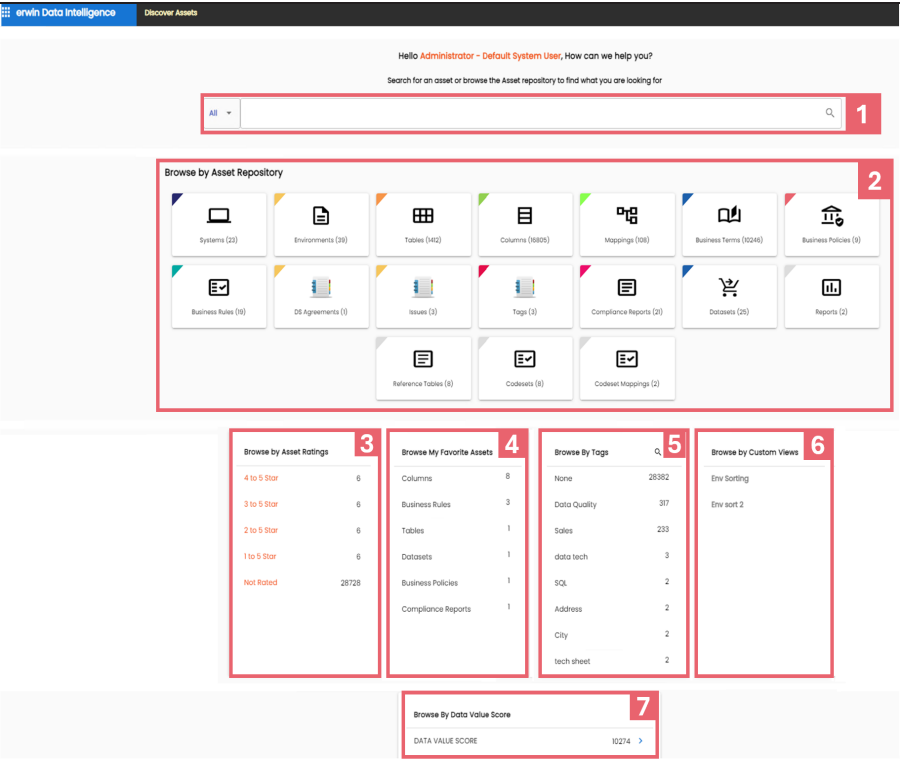
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Discover Assets

To use data efficiently, it is important to be able to discover, access, and analyze it. The Discover Assets module (formerly known as erwin Business User Portal) provides business users and data governance teams with an easy way to discover data and collaborate on data assets. With flexible search and filter mechanisms, mind maps, lineage, impact, and data ratings, you can analyze data assets, improve data accessibility, promote collaboration, and make data governance decisions.

This section walks you through the process of discovering and analyzing technical and business assets in your organization.

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



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

Discover Assets

1-Search	Use this section to filter and search assets.
2-Browse by Asset Repository	Use this section to browse assets by their types.
3-Browse by Asset Ratings	Use this section to browse through assets based on asset ratings.
4-Browse My Favorite Assets	Use this section to browse through your favorite assets.
5-Browse By Tags	Use this section to browse through assets based on tags.
6-Browse by Custom Views	Use this section to browse through saved views.
7-Browse By Data Value Score	Use this section to browse assets based on score classifications.

Discovering assets involves browsing and updating the following assets:

- [Systems](#)
- [Environments](#)
- [Tables](#)
- [Columns](#)
- [Mappings](#)
- [Business Terms](#)
- [Business Policies](#)
- [Business Rules](#)
- [Datasets](#)

You can also enrich and analyze assets by:

- [Reviewing and rating assets](#)
- [Adding tasks](#)
- [Viewing mind maps](#)
- [Viewing lineage](#)
- [Viewing impact](#)
- [Viewing compliance reports](#)

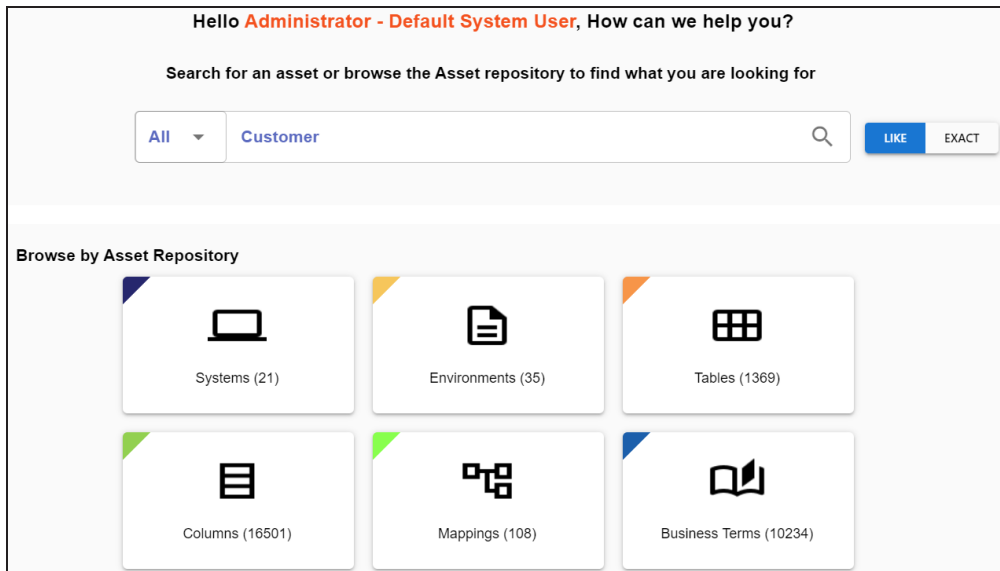
Searching and Filtering

For efficient asset discovery, the Discover Assets module provides extensive search and filter options. Apart from the predefined filter set, you can configure extended properties of technical and business assets as filters. You can use them to [search for assets based on custom fields](#). Additionally, you can also [save your searches as custom views](#) to access them quickly in the future.

To search and filter assets, follow these steps:

1. In the search box, type a keyword. A list of related search terms appears. Choose the required search term or enter a new one.

Two options, Like and Exact, appear. Use these options to narrow down the search result set.



Like

Use this option to get assets that match a part of the search keyword.

Exact

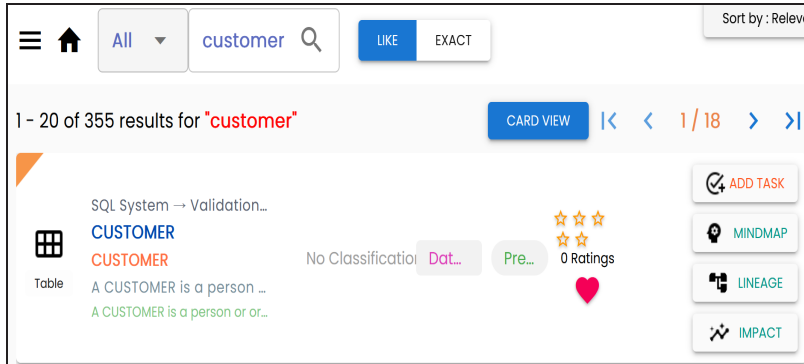
Use this option to get assets that exactly match the search keyword.

2. Click  or press **Enter**.

Searching and Filtering

Based on your search criteria, search results appear.

For example, in the following image, 355 results are displayed for a Like search with keyword, Customer.

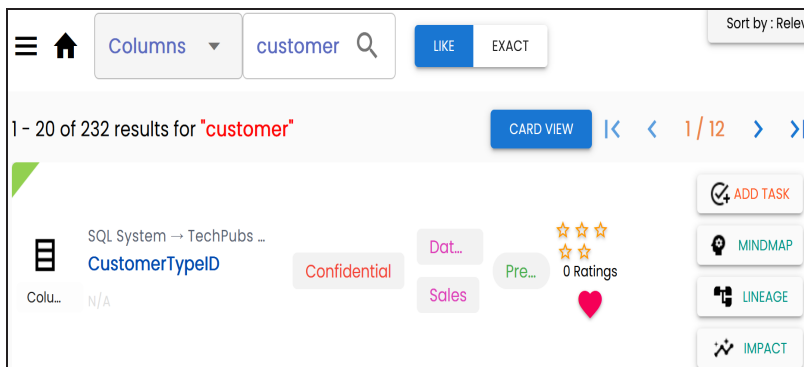


3. In the search box, click **All** to filter search results further based on asset types.

The list of available filters changes depending on asset type.

For example, for the keyword, Customer, and asset type, Column, the Like search displays 232 results. Apart from the asset type, search results also display data value scores, sensitivity classifications, tags, ratings, and workflow status.

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

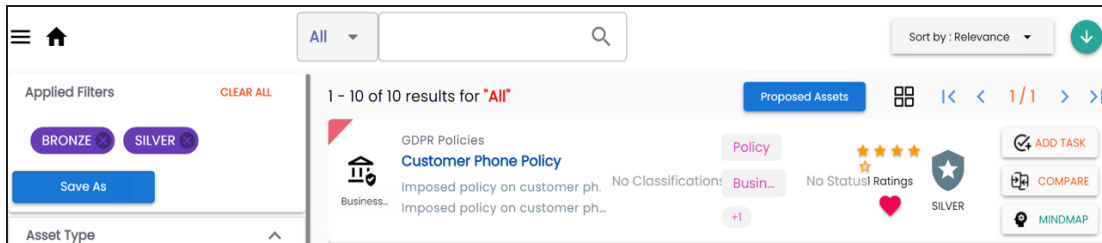


4. In the filters pane under **Data Value Score**, select score classifications, and then click **Apply Filters**.

Searching and Filtering

The selected classifications are added in the Applied Filters list and matches based on these filters are displayed in the search results. You can view data value scores for different assets here based on the classifications you selected in the Applied Filters list.

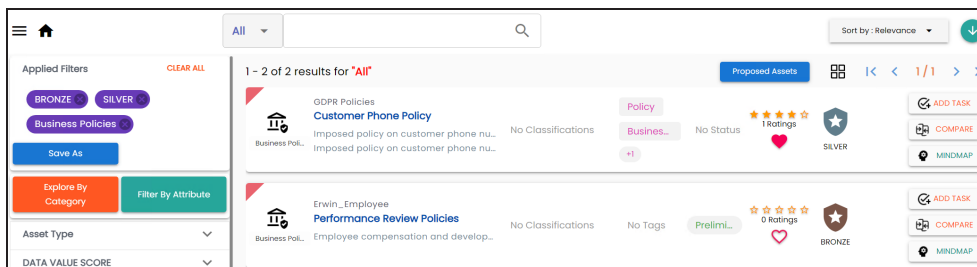
For example, in the following image, Bronze and Silver are added to the Applied Filters list and the search result is narrowed to 10 results.



Additionally, to view the data value score for a particular asset, under **Asset Type**, select the assets and then click **Apply Filters**.

The selected assets are added in the Applied Filters list and matched based on these filters are displayed in the search results. You can view data value score for a particular asset here based on the classification and asset type you selected in the Applied Filters list.

For example, in the following image, Business Policies is added to the Applied Filters list along with Bronze and Silver, and the search result is narrowed down to 2 results.

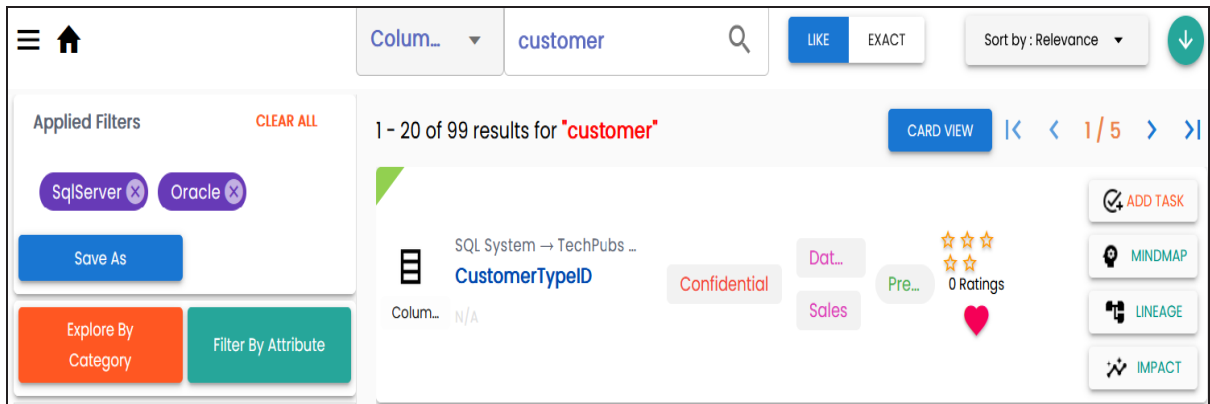


5. In the filters pane under **Database Type**, select databases, and then click **Apply Filters**.

The selected databases are added in the Applied Filters list and matches based on these filters are displayed in the search results.

Searching and Filtering

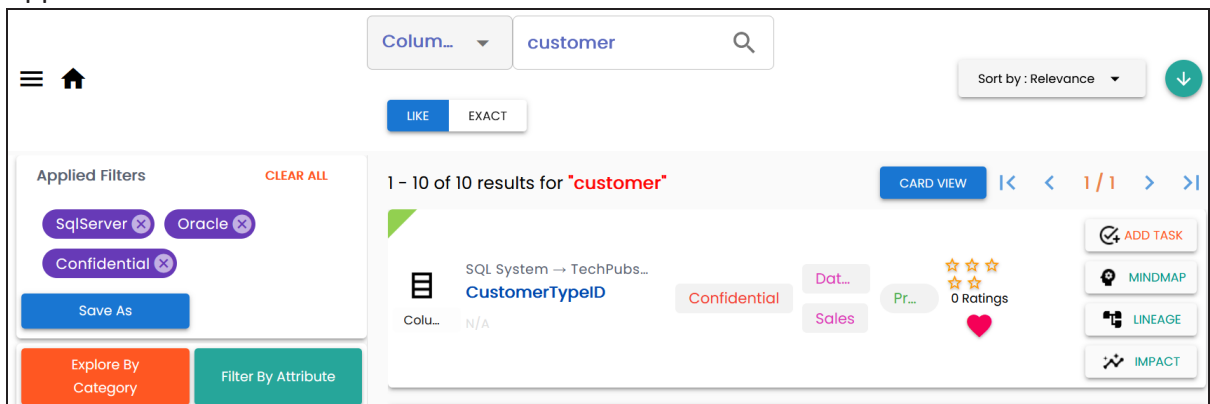
For example, in the following image, SqlServer and Oracle are added to the Applied Filters list and the search result is narrowed down to 99 results.



6. Under **Sensitivity Classification**, select sensitivity tags, and then click **Apply Filters**.

The selected sensitivity tags are added to the Applied Filters list and matches based on these filters are displayed in the search results.

For example, in the following image, a sensitivity tag, Confidential, is added to the Applied Filters list and the search result is narrowed down to 10 records.

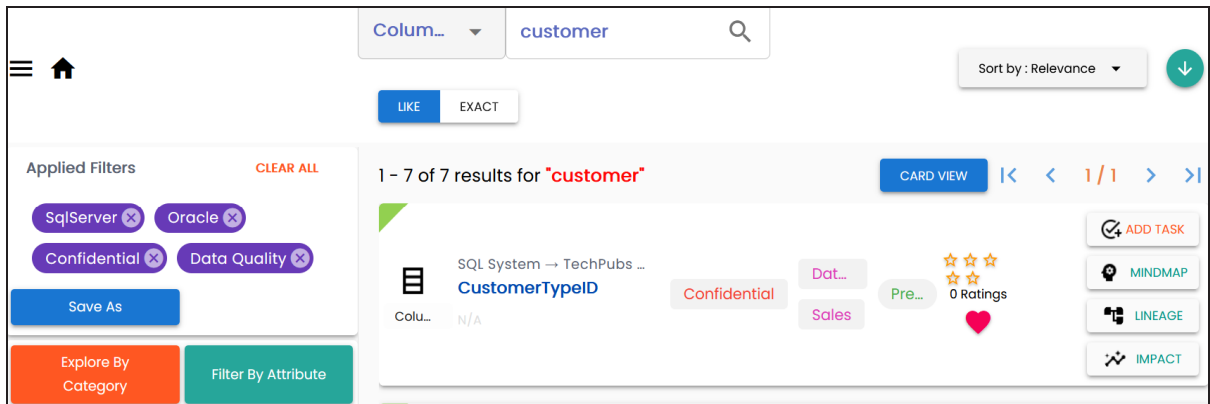


7. Under **Tags**, select user-defined tags, and then click **Apply Filters**.

The selected tags are added to the Applied Filters list and matches based on these filters are displayed in the search result.

Searching and Filtering

For example, in the following image, a tag, QA Verified, is added to the Applied Filters list and the search result is narrowed down to 7 results.

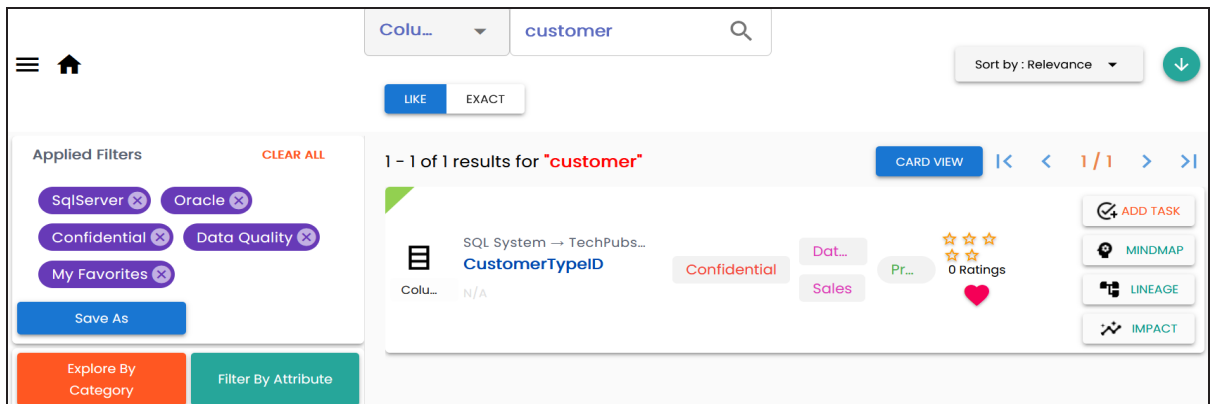


8. Switch **Show My Favourites** to on.

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

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

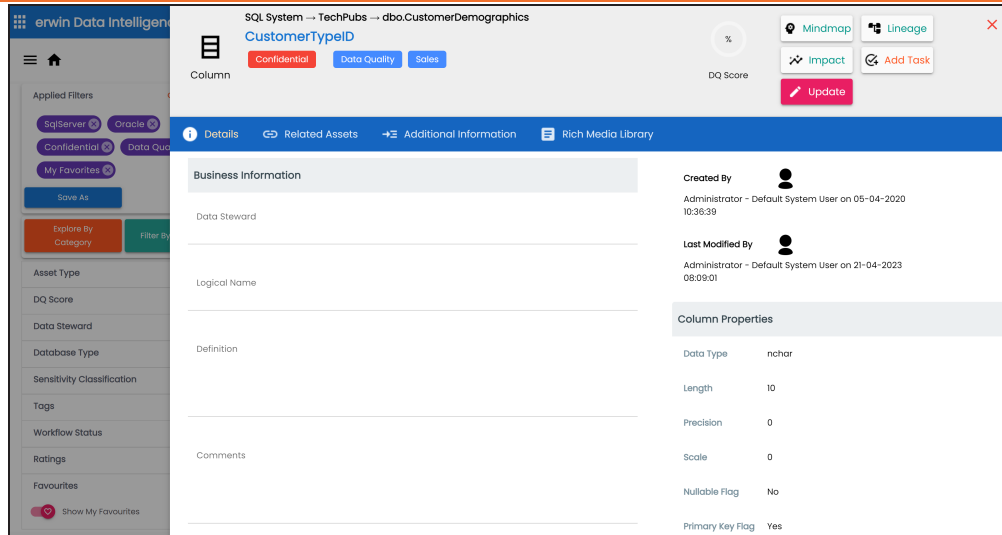
Similarly, you can apply other filters available for an asset to narrow down search results.



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

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

Searching and Filtering



Filter Assets using Extended Properties

You can configure extended properties of technical and business assets as filters and use them to filter assets.

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

Ensure the following:

- Filter feature supports field types such drop-down, list, checkbox, radio, and boolean.
- Switch the **Include Extended Properties** option **ON** on the [Discover Asset Settings](#) page.
- Schedule a [synchronization job or manually synchronize](#) the asset before you can filter assets on the Discover Assets module.

To filter assets based on the extended properties, follow these steps:

Searching and Filtering

1. In the Discover Assets module, click asset type card.

Based on the selection, results are displayed.

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

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

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

2. In the filter pane, expand custom filters, select a filter parameter, and then click **Apply Filters**.

The selected parameters are added in the Applied Filters list and matches based on these filters are displayed in the search results.

Searching and Filtering

For example, in the following image, Outline and Summer are added to the Applied Filters list and the search result is narrowed down to three results.

The screenshot displays the Discover Assets dashboard interface. At the top, there is a search bar with the text "Business Terms" and a dropdown arrow. Below the search bar, the "Applied Filters" section shows two active filters: "Business Terms" and "Outline", with a "CLEAR ALL" link. Below the filters, there are two buttons: "Explore By Category" and "Filter By Attribute". The main content area shows "1 - 3 of 3 results for Browsing 'Business Terms'". The results are listed as follows:

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

On the left side, there is a sidebar with various filter categories: Asset Type, Sensitivity Classification, Tags, Workflow Status, Available, Options, and Preference. The "Options" section is expanded, showing a search bar and a list of filters: "Outline" (checked, 2 results), "Summer" (checked, 2 results), and "All of the above" (unchecked, 1 result). There is also an "APPLY FILTERS" button.

Save Searches as Custom Views

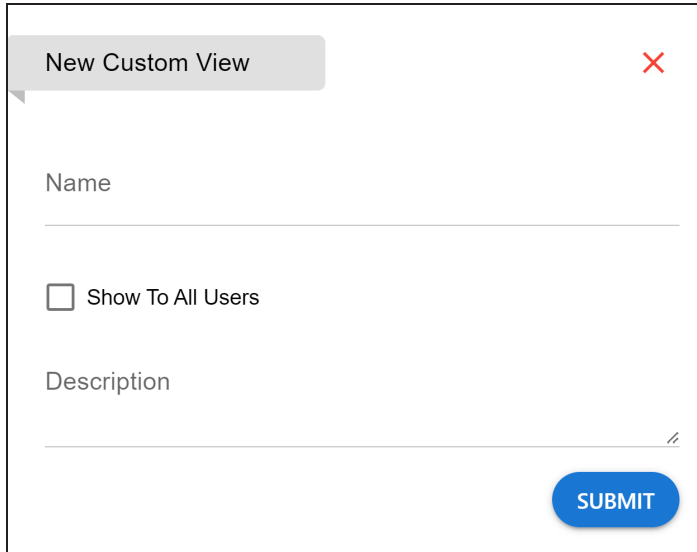
You can save your searches as custom views in Discover Assets dashboard and open these to access required results during subsequent visits. You can also choose if your custom view should be private or available to all users. Similarly, you can use views made by others if they have set the view to be available for all users. However, only the creator of the view can edit or delete it.

To save a search as a custom view, follow these steps:

1. Search with a keyword and apply appropriate search filters to get the required results.
2. Click **Save As**.

Searching and Filtering

The New Custom View screen appears.



New Custom View

Name

☐ Show To All Users

Description

SUBMIT

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

Field	Description
Name	Specifies the name of the custom view
Show To All Users	Specifies whether the view is available for all users
Description	Specifies the details of the custom view

4. Click **Submit**.

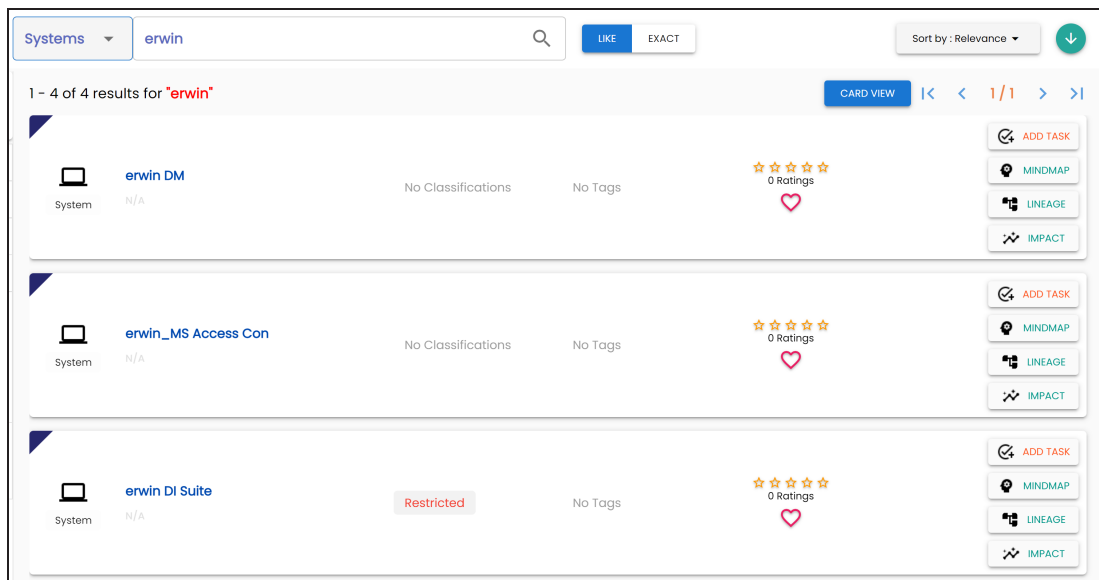
The custom view is created. You can open the custom view on the Browse by Custom View tile on Discover Assets dashboard.

Systems

You can browse through the systems available in your ecosystem using the Discover Assets module. The list of systems facilitates access to system lineage, impact, environments, mind map, and associations, all in one place.

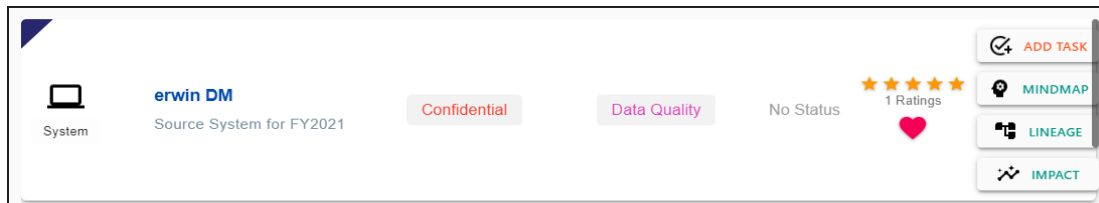
To view the systems list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Systems** card.

A list of systems appears. Use the search box to find the required system from the list.



Alternatively, on the search box, click **All**, and then click **Systems**.

On each system tile, you can view information, such as - business purpose, classification, tags, status, rating, and favorite. Apart from this, you can add corresponding tasks, and view mind maps, lineage, and impact.



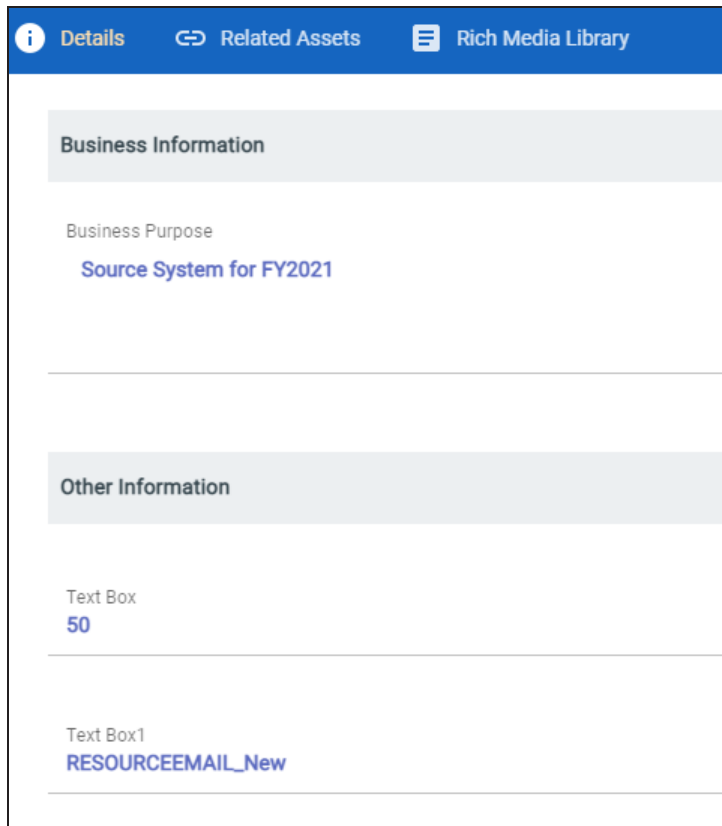
System Details

System details include business purpose, list of environments, audit history, and so on.

To view system details, in the system list, click <System_Name>.

The System page appears. By default, the Details tab opens.

For example, the following image shows details of the erwin DM system. This system's sensitivity classification is Confidential, and it is tagged with Data Quality.



Related Assets

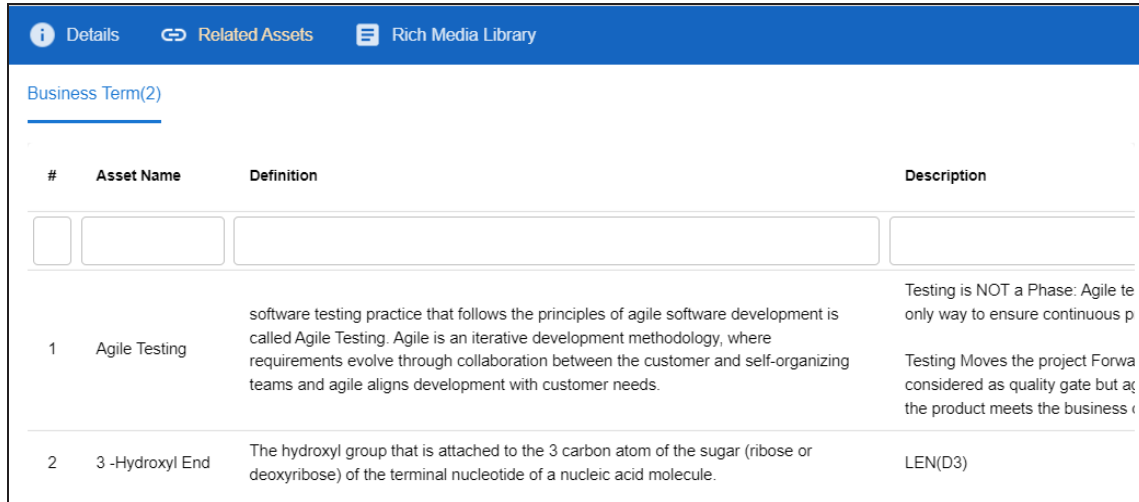
A system can be associated with other technical and business assets.

To view associations of systems, click the **Related Assets** tab.

The list of associated assets appears.

Systems

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



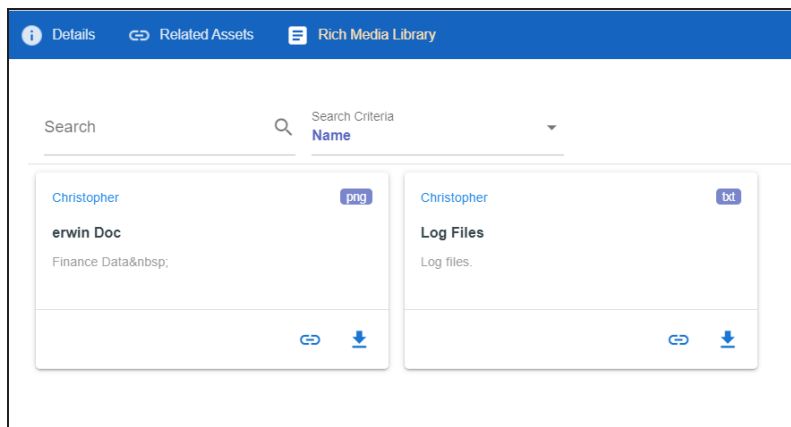
#	Asset Name	Definition	Description
1	Agile Testing	software testing practice that follows the principles of agile software development is called Agile Testing. Agile is an iterative development methodology, where requirements evolve through collaboration between the customer and self-organizing teams and agile aligns development with customer needs.	Testing is NOT a Phase: Agile is the only way to ensure continuous p Testing Moves the project Forward considered as quality gate but as the product meets the business c
2	3 -Hydroxyl End	The hydroxyl group that is attached to the 3 carbon atom of the sugar (ribose or deoxyribose) of the terminal nucleotide of a nucleic acid molecule.	LEN(D3)

Rich Media Library

A system can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view or download these artifacts using the Rich Media Library tab.

To view or download the supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Systems

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link ()

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

Preview ()

Use this option on a card to download the media file.

Apart from details, related assets, and media, you can view mind maps, lineage, and impact. You can also add tasks and update systems. Use the following options:

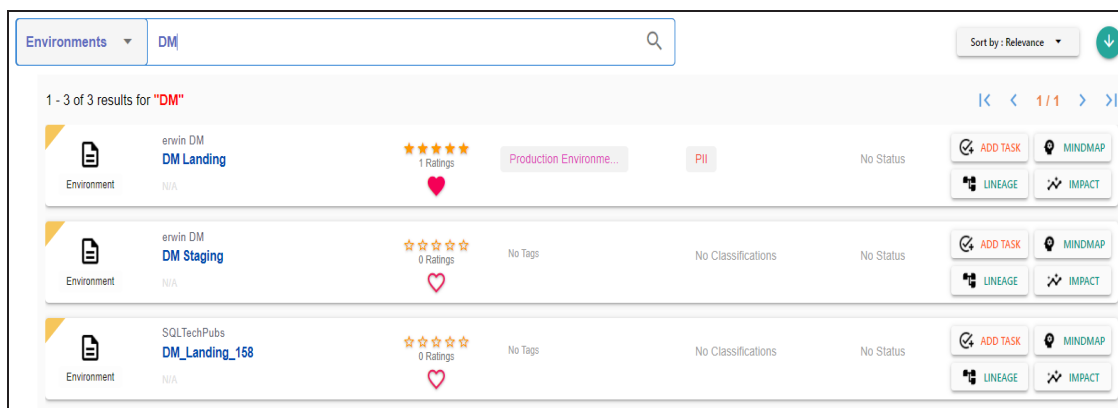
- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace system's origin and destination after source to target mappings. For more information on lineage, refer to the [Viewing Lineage](#) topic.
- **Impact:** Use this option to analyze the impact of a system as source and target. For more information on impact, refer to the [Viewing Impact](#) topic.
- **Add Task:** Use this option to add tasks related to a system. For more information on adding tasks, refer to the [Adding Tasks](#) topic.
- **Update:** Use this option to update system details. This opens the Metadata Manager. For field descriptions, refer to the [Creating Systems](#) topic.
- **Share Link:** Use this option to generate a shareable system link. You can either copy and share the link, or send it through an email.

Environments

You can browse through the environments available in your ecosystem using the Discover Assets module. The list of environments facilitates access to environments lineage, impact, tables, mind map, and associations, all in one place.

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

A list of environments appears. Use the search box to find the required environment from the list.



Alternately, on the search box, click **All**, and then click **Environments**.

On each environment tile, you can view information, such as - business purpose, classification, tags, status, rating, and favorites. Apart from this, you can add corresponding tasks, and view mind maps, lineage, and impact.

Environment Details

Environment details include database type, list of tables, audit history, and so on.

To view environment details, in the environment list, click <Environment_Name>.

The Environment page appears. By default, the Details tab opens.

Environments

For example, the following image shows details of the DM Landing environment. This environment's sensitivity classification is PII, DQ score is 10%, and it is tagged with Production Environment.

The screenshot shows the 'erwin DM' interface for the 'DM Landing' environment. The top navigation bar includes 'Environment', 'PII', and 'Production Environment'. The main content area is divided into two sections: 'Business Properties' and 'Extended Properties'. The 'Business Properties' section shows 'Database Type' as 'ERWin'. The 'Extended Properties' section shows 'Modules' as 'Group' and 'Text Box'. On the right side, there is a 'Created By' section with a user profile and the text 'Administrator - Default System User on 26/02/2020 00:00:00'. Below this is a 'Last Modified By' section with a user profile and the text 'Administrator - Default System User on 17/03/2022 00:00:00'. Further down is a 'Last Refreshed By' section with a user profile and the text 'Administrator - Default System User on 2020-07-27 13:43:23.793'. At the bottom right, there is an 'Explore Tables' section with a search bar and two results: 'Employees' and 'Citizens'.

Related Assets

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

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

The list of associated assets appears.

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

The screenshot shows the 'Related Assets' tab in the erwin DM interface. The tab is titled 'Business Term (2)'. Below the title is a table with the following columns: '#', 'Asset Name', 'Definition', 'Description', 'Catalogname', 'Catalog Hierarchy', and 'Relationship Name'. The table contains two rows of data:

#	Asset Name	Definition	Description	Catalogname	Catalog Hierarchy	Relationship Name
1	CURRENCY	COD Currency	COD Currency		Customer Master Catalog	Golden Source for
2	CUSTOMER	a person who buys your product	a person who buys your product		Customer Master Catalog	Golden Source for

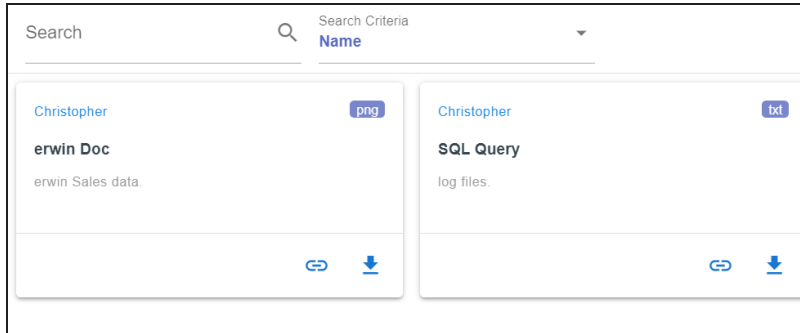
Rich Media Library

Environments

An environment can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view or download these artifacts using the Rich Media Library tab.

To view or download supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link (🔗)

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

Preview (📄)

Use this option on a card to download the media file.

Apart from details, related assets, and media, you can view mind maps, lineage, and impact. You can also add tasks and update systems. Use the following options:

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

Environments

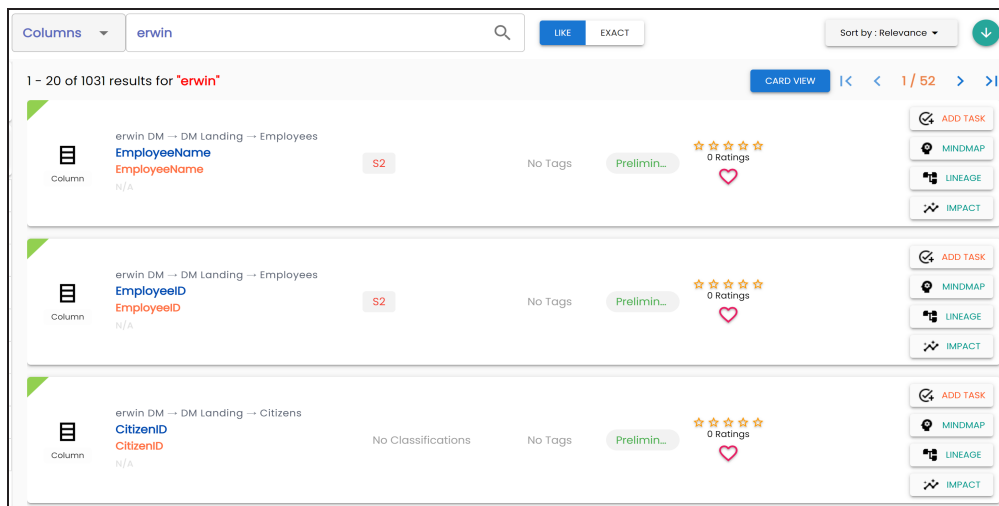
- **Impact:** Use this option to analyze the impact of an environment as source and target. For more information on impact, refer to the [Viewing Impact](#) topic.
- **Add Task:** Use this option to add tasks related to an environment. For more information on adding tasks, refer to the [Adding Tasks](#) topic.
- **Update:** Use this option to update environment details. This opens the Metadata Manager.
- **Share Link:** Use this option to generate a shareable environment link. You can either copy and share the link, or send it through an email.

Columns

You can browse through the columns available in your ecosystem using the Discover Assets module. The list of columns facilitates access to column lineage, impact, mind map, column properties, and associations, all in one place.

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

A list of columns appears. Use the search box to find the required column from the list.



Alternately, on the search box, click **All**, and then click **Columns**.

On each column tile, you can view information, such as business purpose, classification, tags, status, rating, and favorites. Apart from this, you can corresponding add tasks, and view mind maps, lineage, and impact.

Details

Details include logical name, list of technical properties, audit history, and so on.

To view details, on the column list, click <Column_Name>.

The Column page appears. By default, the details tab opens.

Columns

For example, the following image shows details of the Claim Count column. This column's sensitivity is PII, DQ score is 10%, and it is tagged with Production Environment.

Business Properties
Logical Name Claim Count
Definition Count of claims.
Extended Properties
SQL Query ALTER TABLE Claims Analysis ADD Claim Count int;

Related Assets

A column can be associated with other technical and business assets.

To view associations of columns, click the **Related Assets** tab.

The list of associated assets appears.

For example, in the following image, the Claim Count column is associated with a business term and a business policy.

erwin DM -- DM Staging -- Claims Analysis

Claim Count

Column

PII

Production Environment

10%

DQ Score

Mindmap

Lineage

Impact

Add Task

Update

ShareLink

Column Properties

Related Assets

Additional Information

Rich Media Library

Business Term (1)

Business Policy (1)

#	Asset Name	Definition
1	GDPR	EU General Data Protection Regulation (GDPR) replaces the Data Protection Directive 95/46/EC and was designed to harmonise data privacy laws across Europe, to protect and empower all EU citizens data privacy, and to

1-1 of 1 < >

Additional Information

Additional information includes user defined fields configured for a column. Ensure that these fields are displayed for columns under the Properties tab in Metadata Manager. For more information on displaying user defined fields, refer to the [Displaying User Defined Fields](#) topic.

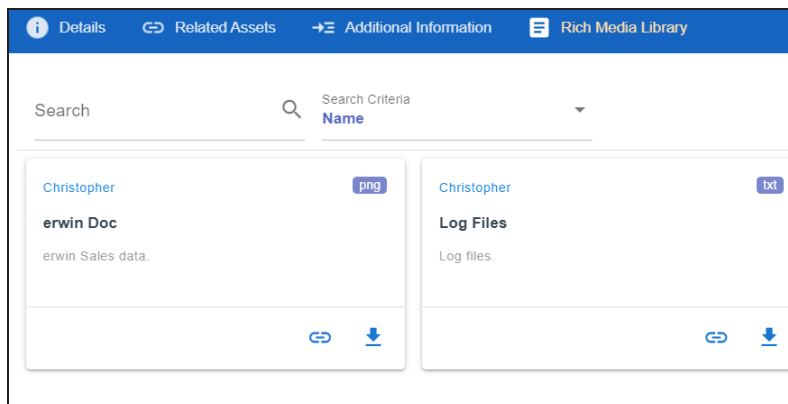
With Language Settings, you can set UI labels of user defined fields. Use Column Metadata section under User Defined Flex Fields to configure these UI labels. For more information, refer to the [Configuring Language Settings](#) topic.

Rich Media Library

A column can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view or download these artifacts using the Rich Media Library tab.

To view or download supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Columns

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link ()

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

Preview ()

Use this option on a card to download the media file.

Apart from details, related assets, and media, you can view mind maps, lineage, and impact. You can also add tasks and update columns. Use the following options:

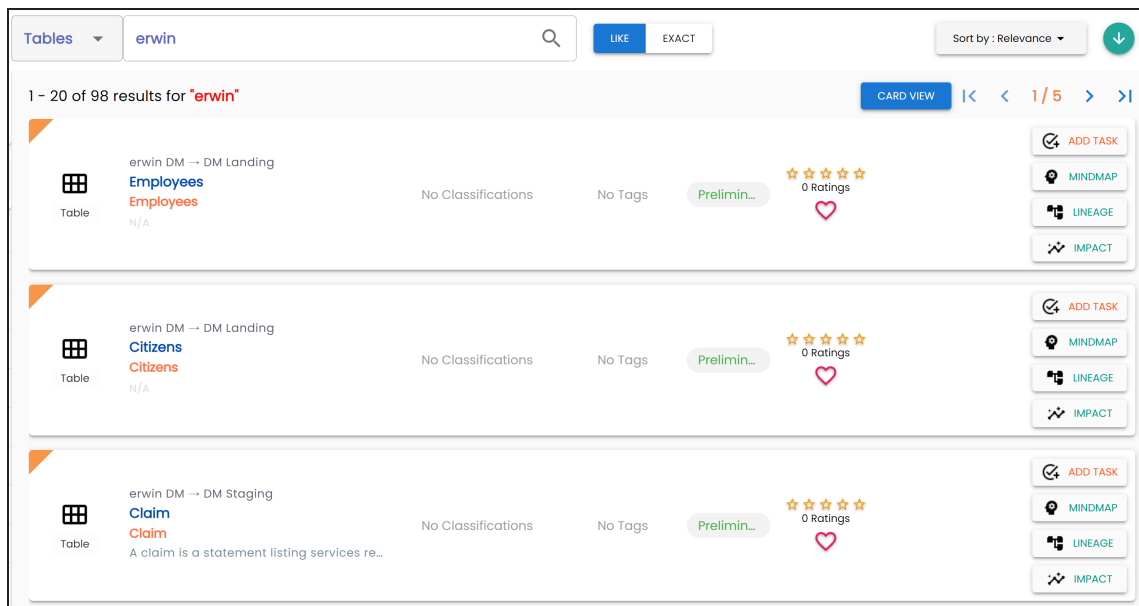
- **Mindmap:** Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the [Viewing Mind Maps](#) topic.
- **Lineage:** Use this option to trace column's origin and destination after source to target mappings. For more information on lineage, refer to the [Viewing Lineage](#) topic.
- **Impact:** Use this option to analyze the impact of a column as source and target. For more information on impact, refer to the [Viewing Impact](#) topic.
- **Add Task:** Use this option to add tasks related to a column. For more information on adding tasks, refer to the [Adding Tasks](#) topic.
- **Update:** Use this option to update column details. This opens the Metadata Manager.
- **Share Link:** Use this option to generate a shareable column link. You can either copy and share the link, or send it through an email.

Tables

You can browse through the tables available in your ecosystem and view a list of all the tables. It gives you access to view lineage, impact, columns, mind map, and properties of a table.

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

A list of tables appears. Use the search box to find the required table.



Alternately, on the search box, click **Tables**.

On each table tile, you can view information, such as business purpose, classification, tags, status, rating, and favorites. Apart from this, you can corresponding add tasks, and view mind maps, lineage, and impact.

Table Properties

Table properties include logical name, list of columns, audit history, and so on.

To view table properties, in the table list, click <Table_Name>.

Tables

The Table page appears. By default, the Properties tab opens.

For example, the following image shows properties of the Claims Analysis. This table's sensitivity classification is PII, DQ score is 10%, and it is tagged with Data Quality.

The screenshot shows the 'Claims Analysis' table properties page. The top navigation bar includes 'erwin DM - DM Staging', 'Claims Analysis', and a 'Table' tab. A 'Data Quality' badge is visible. The main content area is divided into 'Business Properties' and 'Extended Properties'. The 'Business Properties' section shows the 'Logical Name' as 'Claims Analysis' and the 'Definition' as 'This information package analyzes claims by time, member, and claim.' The 'Extended Properties' section shows the 'SQL Query' as 'ALTER TABLE Claims Analysis ADD Email varchar(255);'. On the right, the 'Created By' and 'Last Modified By' fields are both 'Administrator - Default System User'. Below these, the 'Explore Columns' section lists columns: 'Claim Surrogate...', 'Date Identifier', 'Member Key', 'Claim Count', 'Claim Amount US...', and 'Member Key', each with a search icon.

Related Assets

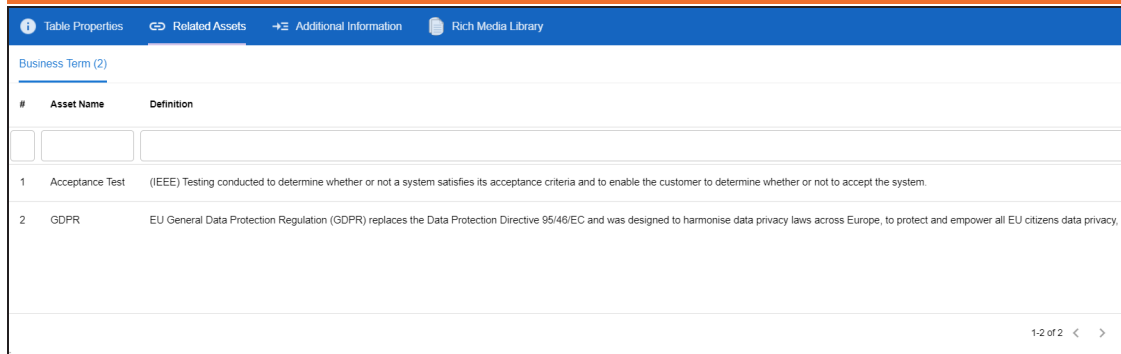
A table may be associated with the technical and business assets. The technical assets refer to systems, environments, tables, and columns. The business assets refer to business terms, business policies, business rules, and custom assets.

To view associations of tables, on the **Table** page, click **Related Assets**.

The list of associated assets appears.

For example, in the following image, the Claims Analysis table is associated with two business terms.

Tables



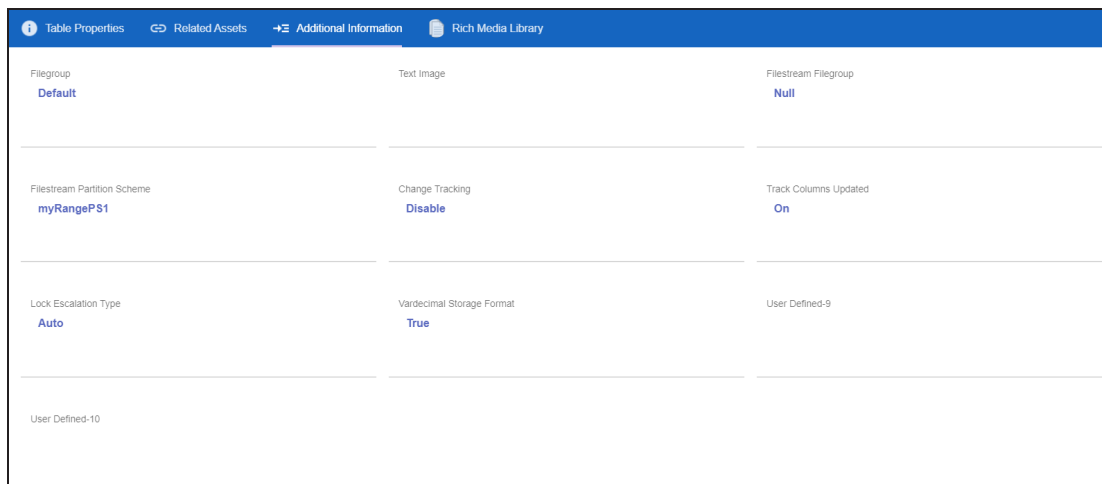
Business Term (2)		
#	Asset Name	Definition
1	Acceptance Test	(IEEE) Testing conducted to determine whether or not a system satisfies its acceptance criteria and to enable the customer to determine whether or not to accept the system.
2	GDPR	EU General Data Protection Regulation (GDPR) replaces the Data Protection Directive 95/46/EC and was designed to harmonise data privacy laws across Europe, to protect and empower all EU citizens data privacy, and to set a high standard of data protection.

Additional Information

Additional information includes user defined fields configured for a table. Ensure that these fields are displayed for tables under the Properties tab in Metadata Manager. For more information on displaying user defined fields, refer to the [Displaying User Defined Fields](#) topic.

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

The following image, displays the user defined fields configured for a table.



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

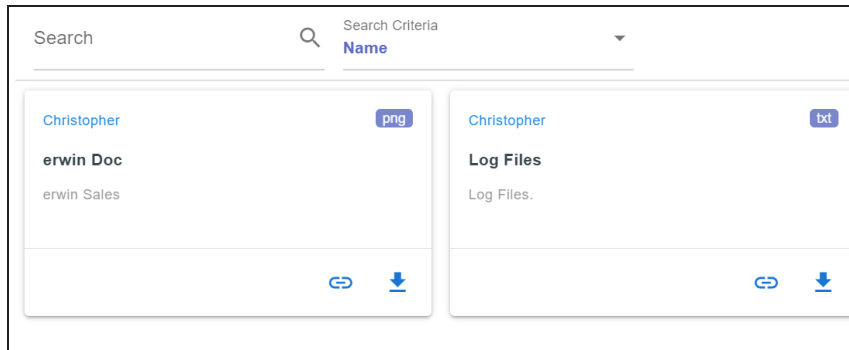
Rich Media Library

Tables

A table can contain supporting artifacts, such as text files, audio files, video files, and so on. You can view and download these artifacts using **Rich Media Library** tab.

To view or download supporting artifacts, click the **Rich Media Library** tab.

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

Use this option to filter your search based on Owner Name, Description, Created By, and Type of the media.

Link (🔗)

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

Preview (📄)

Use this option on a card to download the media file.

Apart from details, related assets, and media, you can view mind maps, lineage, and impact. You can also add tasks and update systems. Use the following options:

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

Tables

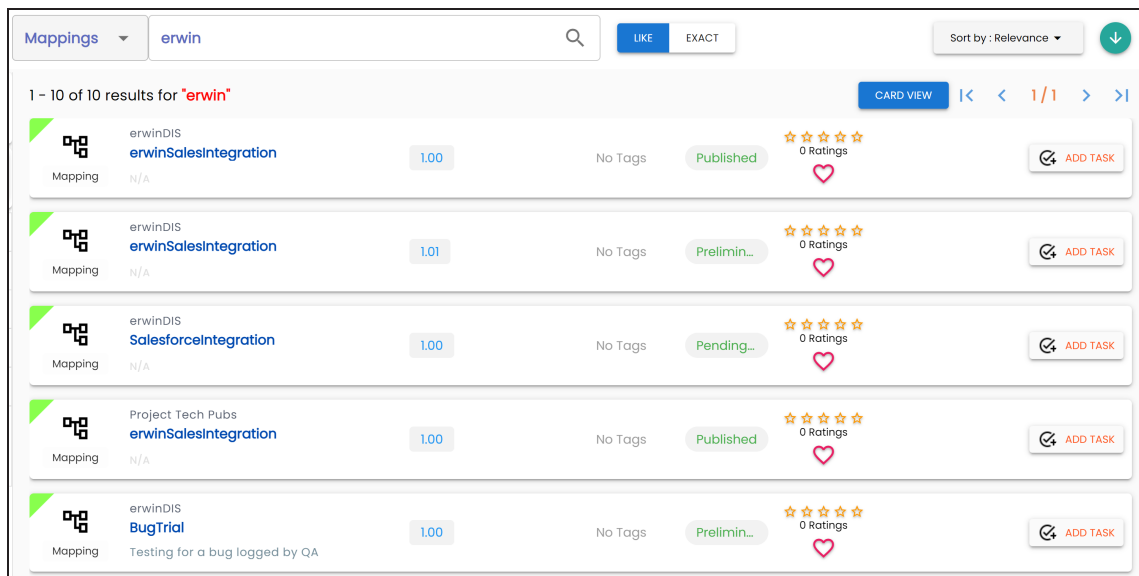
- **Impact:** Use this option to analyze the impact of a table as source and target. For more information on impact, refer to the [Viewing Impact](#) topic.
- **Add Task:** Use this option to add tasks related to a table. For more information on adding tasks, refer to the [Adding Tasks](#) topic.
- **Update:** Use this option to update table details. This opens the Metadata Manager.
- **Share Link:** Use this option to generate a shareable table link. You can either copy and share the link, or send it through an email.

Mappings

You can browse through the mappings available in your ecosystem using the Discover Assets module. The list of systems facilitates access to view, share, and update details of a mapping, all in one place.

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

A list of mappings appears. Use the search box to find the required mapping from the list.



Alternately, on the search box, click **All**, and then click **Mappings**.

On each mappings tile, click <Mapping_Name>. The mapping page appears. You can view the mapping information with respect to the following tabs:

Tab	Description
Map Spec Overview	Under this, you can view map details, workflow status, and audit history of a map.
Map Spec Grid	Under this, you can analyze mapping specifications and view its source, target, and transformation details.
Graphical Designer	Under this, you can view source to target mappings in a graphical view.

Mappings

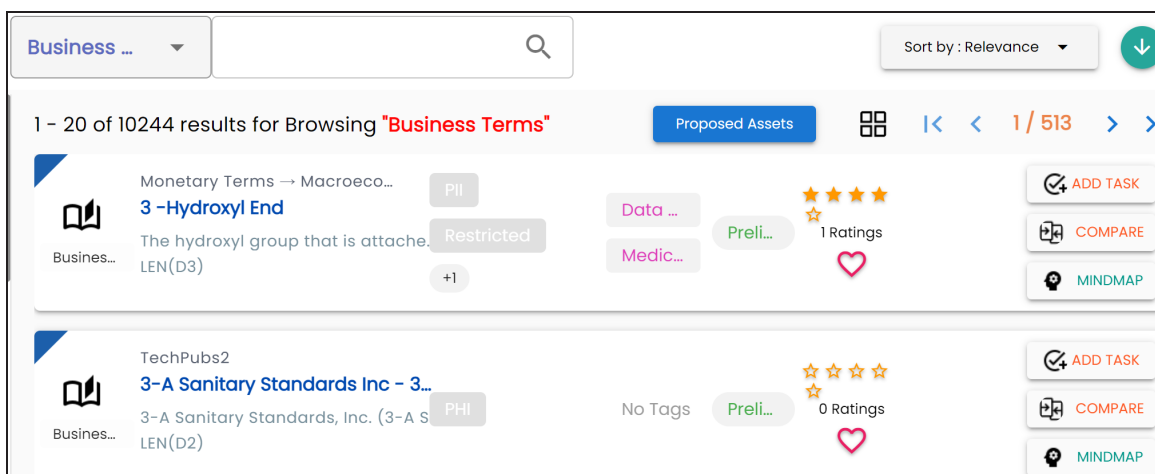
Tab	Description
Source Extract SQL	Under this, you can view: - SQL Query relevant to a mapping specification - SQL Query Description
Target Update Strategy	Under this, you can view target update strategy of a map.
Testing Notes	Under this, you can view relevant testing notes with respect to a mapping specification.
Map Specs Docs	Under this, you can view the uploaded documents related to a mapping specification.
Assignment	Under this, you can view users assigned to a mapping specification.
Release Information	Under this, you can view release information of a mapping.
User Defined Tabs (1-5)	Under this, you can view user defined fields configured for a map. These can be used by you with your own UI labels .
Extended Properties	Under this, you can view extended properties configured for a mapping specification.

Business Terms

You can browse through the business terms available in your ecosystem using the Discover Assets module. The list of business terms facilitates mind map, and associations of a business term, all in one place.

To view the business terms list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Business Terms** card.

A list of business terms appears. Use the search box to find the required business term from the list. Additionally, you can use **Propose Assets** option to propose new business terms. For more information, refer to the [Proposing Assets](#) topic.



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

- [Add task](#)
- [View mind map](#)
- [Compare assets](#)

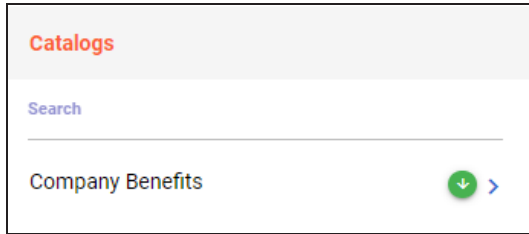
In addition to the above tasks, on the business term list, you can click  to mark business terms as favorite.

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

Business Terms

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

The download button  appears.



2. Click .

The selected business asset is downloaded in the XLSX format.

Viewing Business Term

The View Business Term tab includes term details, governance responsibilities, audit history, and so on.

To access the View Business Term tab, on the business term list, click <Business_Term>.

The <Business_Term> page appears and displays asset details.

For example, the following image displays, details of the 3 - Hydroxyl End business term. This displays the asset's details, rating, sensitive classification, tags, associations, additional properties, governance responsibilities, audit history and more. Now, each associated asset is clickable. Clicking on any of these assets takes you to the specific asset's page.

Business Terms

The screenshot shows the '3-Hydroxyl End' business term details page. The header includes the term name and a breadcrumb trail: 'Monetary Terms-->Macroeconomics'. The page is divided into several sections:

- Workflow Status:** Preliminary Draft, with a line graph icon.
- Rating:** Four stars, with a star icon.
- Rich Media Library:** 1 item, with a document icon.
- Tags:** Data Quality, Medical.
- Asset Information:**
 - Definition:** The hydroxyl group that is attached to the 3 carbon atom of the sugar (ribose or deoxyribose) of the terminal nucleotide of a nucleic acid molecule.
 - Description:** LEN(D3)
 - Notes:** No Data Found
 - [SHOW ADDITIONAL INFORMATION](#)
- Related Assets (Associations):** A grid of business terms including: 3-A Sanitary Standards Inc - 3-A SSI, 5 End, 510 - K Device, A New Glossary, A per D, A per E, A per NDA Batches, A2LA, AA, AAA, AAALAC, AAAS, AAB, AABC, AACR, AADA, AAFCO, AAFP, AAI, AALA, AAMA, AAMC, AAMI, AANN, AANS, AAP, AAPCC, AAPHP, AAPM, AAPS, AAR, AARP, AAS, AASHTO, AATB, AAV, AB, AB - CDRH, ABA, ABC, ABE, ABG, ABI, Abilama, Abiogenesis, Abiotic, ABM, ABMA, ABMT, ABPI, ABRA, ABRF, ABS.
- Governance Responsibilities:**
 - Data Stewards:** Richard Cooper
 - Compliance Officer:** Luqman Michal
- Classification:** PI, Restricted, S2. No Description Found.
- Audit History:**
 - Created By:** Administrator - Default System User
 - Created Date:** 12-06-2020 10:03:11

Apart from viewing the business term details, click  to edit them in a new tab. Additionally, click  to generate a shareable link to share business terms.

For more information on editing business terms, refer to the [Managing Business Terms](#) topic.

Editing business terms also include the following:

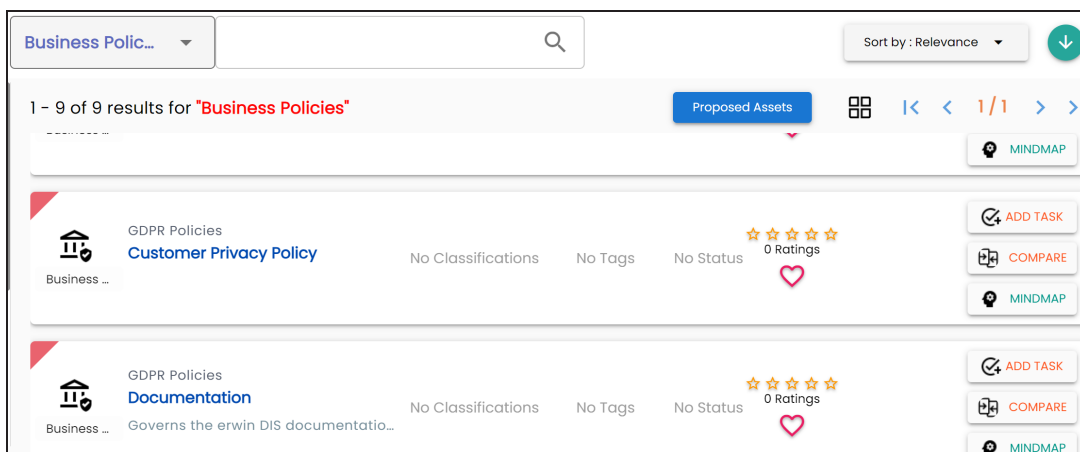
- [Setting up associations](#)
- [Adding rich media](#)
- [Viewing workflow logs](#)

Business Policies

You can browse through the business policies available in your ecosystem using the Discover Assets module. The list of business policies facilitates access to view mind map, and associations of a business policy, all in one place.

To view the business policies list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Business Policies** card.

A list of business policies appears. Use the search box to find the required business policy from the list.



You can also [propose new business policies](#) using the Proposed Assets option.

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

- [Add task](#)
- [View mind map](#)
- [Compare assets](#)

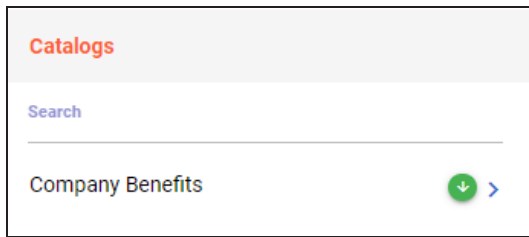
In addition to the above tasks, on the business policy list, you can click  to mark business policies as favorite.

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

Business Policies

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

The download button  appears.



2. Click .

The selected business asset is downloaded in the XLSX format.

Viewing Business Policy

The View Business Policy tab includes policy details, governance responsibilities, audit history, and so on.

To access the View Business Policy tab, on the business policy list, click <Business_Policy>.

The <Business_Policy> page appears.

For example, the following image displays, details of the Customer Phone Policy appear. This displays the asset's details, rating, sensitive classification, tags, associations, additional properties, governance responsibilities, audit history and more. Now, each associated asset is clickable. Clicking on any of these assets takes you to the specific asset's page.

Business Policies

The screenshot displays the 'Customer Phone Policy' page under the 'GDPR Policies' category. The page features a top navigation bar with icons for edit, help, share, and close. Below the header, there are four main sections: 'Workflow Status' (No Status), 'Rating' (4 stars), 'Rich Media Library' (1 item), and 'Tags' (Policy, Business Case, Phone). The 'Asset Information' section includes 'Definition' (Imposed policy on customer phone numbers), 'Description' (Imposed policy on customer phone numbers), and 'Notes' (Imposed policy on customer phone numbers). The 'Related Assets (Associations)' section shows columns for 'CitizenID', 'CLPCSTR', and 'OPER', and a 'Business Term' section with '3 -Hydroyl End' and 'CUSTOMER'. The 'Business Rule' section shows 'Analysis'. The 'Governance Responsibilities' section lists 'Technical Data Steward' as 'Joey Adams'. The 'Policy Expiry' section shows 'Expiry Type' as 'No Expiry' and 'Policy Start Date' as '12-06-2024 14:20:00'. The 'Audit History' section lists 'Created By' (Administrator - Default System User), 'Created Date' (17-03-2020 05:49:18), 'Last Modified By' (Administrator - Default System User), and 'Modified Date'.

Apart from viewing the business policy details, click  to edit them in a new tab. Additionally, click  to generate a shareable link to share business policies.

For more information on editing business policies, refer to the [Managing Business Policies](#) topic.

Editing business terms also include the following:

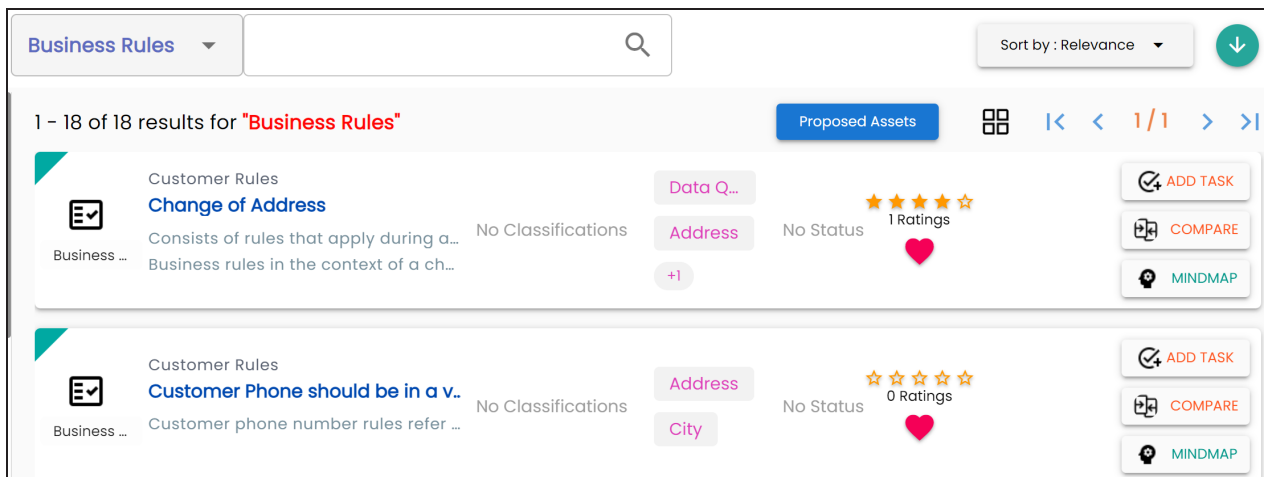
- [Setting up associations](#)
- [Adding rich media](#)
- [Viewing workflow logs](#)

Business Rules

You can browse through the business rules in your ecosystem using the Discover Assets module. The list of business rules facilitates access to view system lineage, impact, environments, mind map, and associations, all in one place.

To view the business rules list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Business Rules** card.

A list of business rules appears. Use the search box to find the required business rule from the list.



You can also [propose new business rules](#) using the Proposed Assets option.

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

- [Add task](#)
- [View mind map](#)
- [Compare assets](#)

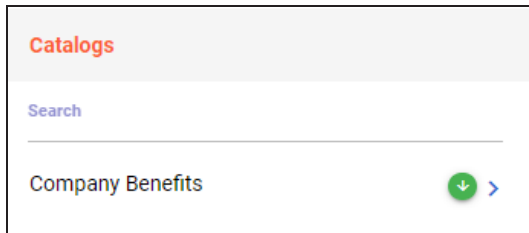
In addition to the above tasks, on the business rule list, you can click  to mark business rules as favorite.

Business Rules

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

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

The download button  appears.



2. Click .

The selected business asset is downloaded in the XLSX format.

Viewing Business Rule

The View Business Rule tab includes rule details, governance responsibilities, audit history, and so on.

To access the View Business Rule tab, on the business policy list, click **<Business_Rule>**.

The **<Business_Rule>** page appears.

For example, the following image displays, details of the Change of Address business rule. This displays the asset's details, rating, sensitive classification, tags, associations, additional properties, governance responsibilities, audit history and more. Now, each associated asset is clickable. Clicking on any of these assets takes you to the specific asset's page.

Business Rules

The screenshot shows a web application interface for managing business rules. The main title is 'Change of Address' with a subtitle 'Customer Rules'. The interface is divided into several sections:

- Workflow Status:** Shows 'No Status' with a line graph icon.
- Rating:** Displays five stars, with the first four filled and the fifth empty, and a blue star icon.
- Rich Media Library:** Shows a count of '1' with a document icon.
- Tags:** A list of tags including 'Data Quality', 'Address', and 'City'.
- Governance Responsibilities:** A section for 'Data Stewards' listing 'Mike Mannigan'.
- Audit History:** A table showing the rule's history:

Created By	Created Date	Last Modified By	Modified Date
Administrator - Default System User	30-03-2020 05:14:46	Administrator - Default System User	01-06-2023 13:55:09

The main content area is titled 'Asset Information' and includes:

- Definition:** 'Consists of rules that apply during an address change.'
- Description:** 'Business rules in the context of a change of address refer to the guidelines, policies, and procedures that organizations follow when customers or clients request to update their address information. These rules ensure that the change of address process is executed accurately, securely, and in compliance with legal requirements.'
- Notes:** 'By adhering to these business rules, organizations can effectively manage the change of address process, maintain accurate customer records, and provide a smooth experience for their customers during a transition to a new address.'
- Objective:** 'No Data Found'

Below this is the 'Related Assets (Associations)' section, which lists 'Business Term' with three associated items: '3-Hydroxyl End', '5 End', and 'A New Glossary'.

At the bottom, there is an 'Additional Properties' section.

Apart from viewing the business rule details, click  to edit them in a new tab. Additionally, click  to generate a shareable link to share business policies.

For more information on editing business rules, refer to the [Managing Business Rules](#) topic.

Editing business rules also include the following:

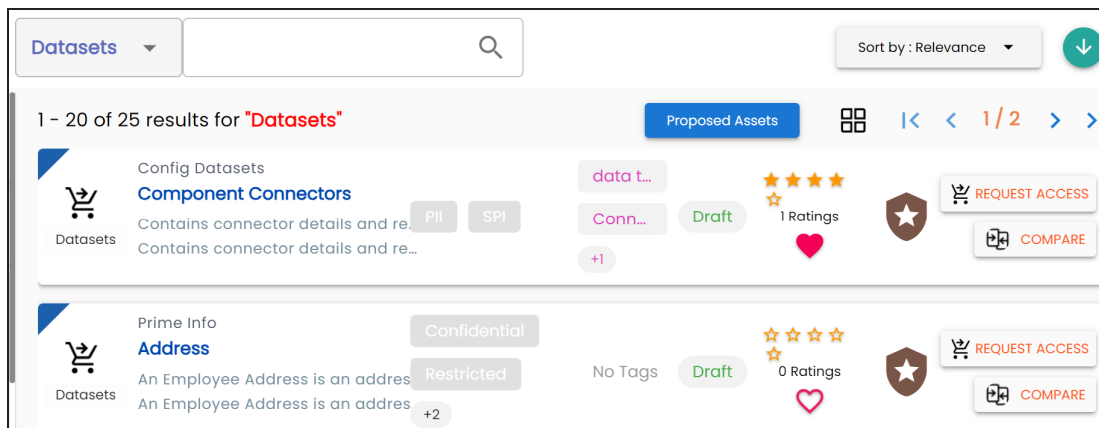
- [Setting up associations](#)
- [Adding rich media](#)
- [Viewing workflow logs](#)

Datasets

You can browse through the datasets available in your ecosystem using the Discover Assets module. The list of datasets helps you to view mind maps and create associations of a dataset, all in one place.

To view the datasets, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Datasets** card.

A list of datasets appears. Use the search box to find the required dataset from the list.



You can also [propose new datasets](#) using the Proposed Assets option.

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

- [Add task](#)
- [View mind map](#)
- [Compare datasets](#)

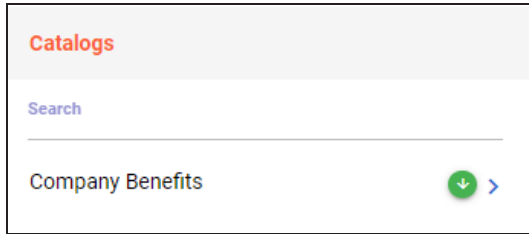
In addition to the above tasks, on the datasets list, you can click  to mark datasets as favorite.

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

Datasets

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

The download button  appears.



2. Click .

The selected asset is downloaded in the XLSX format.

Viewing Datasets

The dataset details include asset details, governance responsibilities, audit history, tags, and so on.

To view a dataset, on the datasets list, click <Dataset>.

The <Dataset> page appears and displays asset details.

For example, the following image displays, details of the Component Connector dataset.

This displays the asset's data value score, sensitive classification, tags, associations, additional properties, governance responsibilities, audit history and more. Now, each associated asset is clickable. Clicking on any of these assets takes you to the specific asset's page.

Datasets

The screenshot displays the 'Component Connectors' interface with the following components:

- Top Bar:** 'Component Connectors' title, 'Config Datasets' subtitle, and icons for edit, help, share, and close.
- Metrics Row:**
 - Data Value Score:** 98% (GOLD)
 - Workflow Status:** Draft
 - Rating:** 3 stars (blue star icon)
 - Rich Media Library:** 0 items
 - Tags:** data tech, Connectors, tech sheet
- Asset Information:**
 - Definition:** Contains connector details and references.
 - Description:** Contains connector details and references.
- Related Assets (Associations):**
 - Environment:** _Local, CSV_erwin, DM Landing, DM Staging, DM_Landing_158, D-Test
- Additional Properties:**
 - Business Initiative:** No Data Found
- Governance Responsibilities:** No Assignments Found
- Classification:** S2, Secret; No Description Found
- Audit History:**
 - Created By:** Administrator - Default System User
 - Created Date:** 10-05-2023 13:19:25
 - Last Modified By:**

Apart from viewing the dataset details, click  to edit them in a new tab. Additionally, click  to generate a shareable link to share datasets.

For more information on editing datasets, refer to the [Managing Datasets](#) topic.

Editing datasets also include the following:

- [Setting up associations](#)
- [Adding rich media](#)
- [Viewing workflow logs](#)

Compliance Reports

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



To view compliance reports in this module, you must import the Compliance Reports Starter Kit into Business Glossary Manager. For more information on importing the Compliance Reports Starter Kit, refer to the [Importing Compliance Reports](#) topic.

To view the compliance reports list, on the **Discover Assets** dashboard, under **Browse by Asset Repository**, click the **Compliance Reports** card.

A list of compliance reports appears. Use the search box to find the required report from the list.

The screenshot shows the 'Compliance Reports' interface. At the top, there is a search bar with a magnifying glass icon and a dropdown menu labeled 'Compliance...'. To the right of the search bar is a 'Sort by : Relevance' dropdown and a green circular button with a downward arrow. Below the search bar, it says '1 - 20 of 21 results for "Compliance Reports"'. There is a blue button labeled 'Proposed Assets' and a grid icon. Navigation arrows and a page indicator '1 / 2' are also visible. The main area displays two report tiles. Each tile has a document icon, a title, a description, and various metadata. The first tile is titled 'Business Assets Compliance' and 'Business Policies not having go...'. It has a 'Confidential' tag, a 'Data ...' tag, 'No Status', and '1 Ratings' (indicated by four stars). It also has an 'ADD TASK' button and a 'COMPARE' button. The second tile is titled 'Business Assets Compliance' and 'Business Policies without any A...'. It has 'No Classifications', 'No Tags', 'No Status', and '0 Ratings' (indicated by four stars). It also has an 'ADD TASK' button and a 'COMPARE' button. Both tiles have a red heart icon at the bottom right.

You can also [propose new compliance reports](#) using the Proposed Assets option.

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

- [View report details](#)
- [Download reports](#)
- [Add tasks](#)

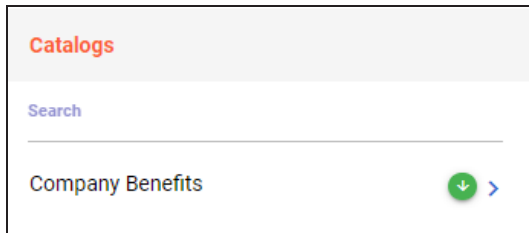
Compliance Reports

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

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

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

The download button  appears.



2. Click .

The selected business asset is downloaded in the XLSX format.

Viewing Report Details

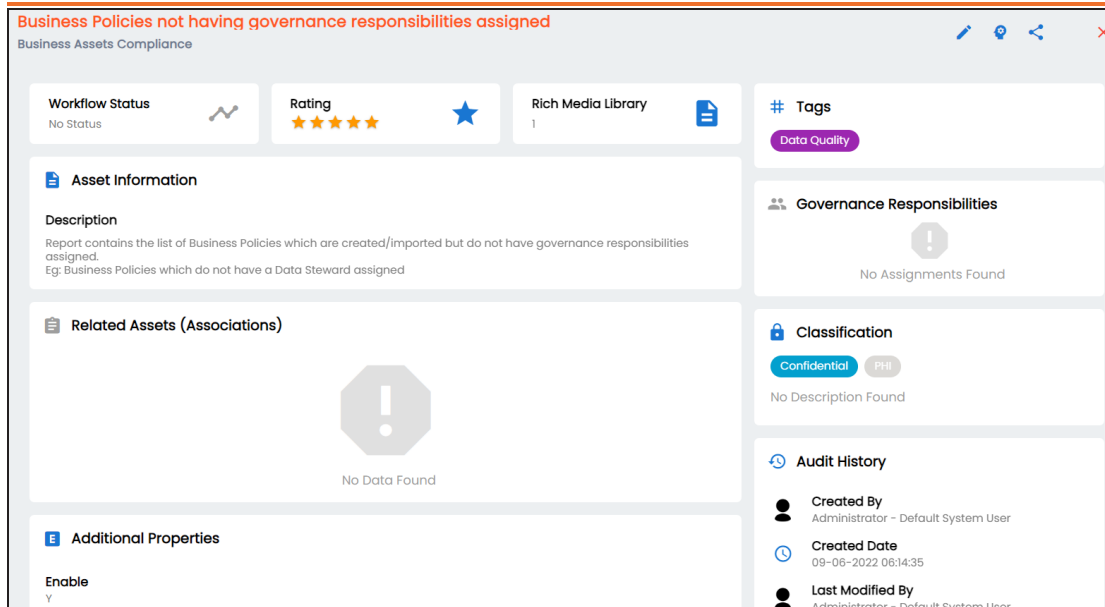
The report details include report name, description, email recipients, report generation frequency, threshold, SDI classification, audit history, and other details.

To view report details, in the list, click a <Compliance_Report_Name>.

The <Compliance_Report> page appears.

For example, the following image shows details of the Business Asset Compliance report. This displays the report details, rating, sensitive classification, tags, associations, additional properties, governance responsibilities, audit history and more. Now, each associated asset is clickable. Clicking on any of these assets takes you to the specific asset's page.

Compliance Reports



Apart from viewing the compliance report details, click  to edit them in a new tab. Additionally, click  to generate a shareable link to share compliance reports.

For more information on editing compliance reports, refer to the [Managing Compliance Reports](#) topic.

Downloading Reports

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

To download the report, in the <Compliance_Report> page, go to the **Documents** tab. Then, click .

For example, the following image shows downloadable report in the Documents tab of the Business Asset Compliance report.

Business Assets Compliance

Business Policies not having governance responsibilities assigned

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

Search

Search Criteria

Name

No Owner

Business Policies

No Description available

Download

Download

Reviewing and Rating Assets

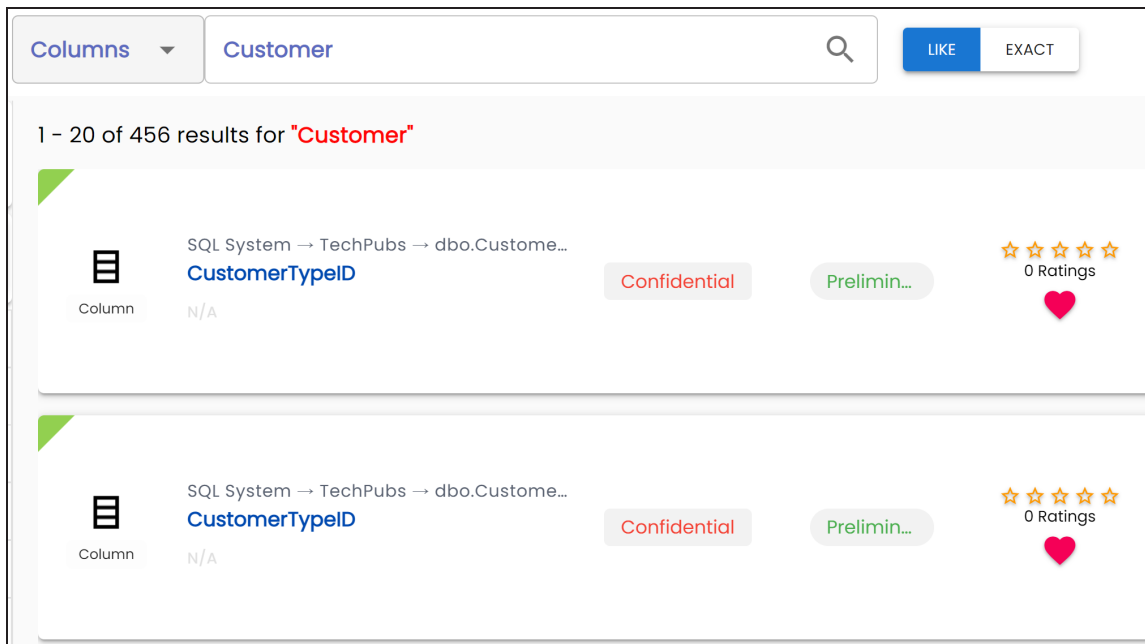
Using the Discover Assets module, you can rate and review data assets. Ratings enable you to maintain data asset quality of an asset and you can support ratings with descriptive reviews.

To review and rate assets, follow these steps:

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

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

For example, in the following image, a columns list appears after entering Claim Count as the search string and selecting Columns as the asset type.



2. Click ratings for the required asset.

The Ratings and Reviews page appears.

Reviewing and Rating Assets

Ratings and Reviews

Write a Review

erwin DM → DM Staging → Claims Analysis

Claim Count

0.0

☆ ☆ ☆ ☆ ☆

based on 0 reviews

5 ☆

(0)

4 ☆

(0)

3 ☆

(0)

2 ☆

(0)

1 ☆

(0)

3. Click **Write a Review**.

The My Review page appears.

My Review

Rating

☆ ☆ ☆ ☆ ☆

Title

Review

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

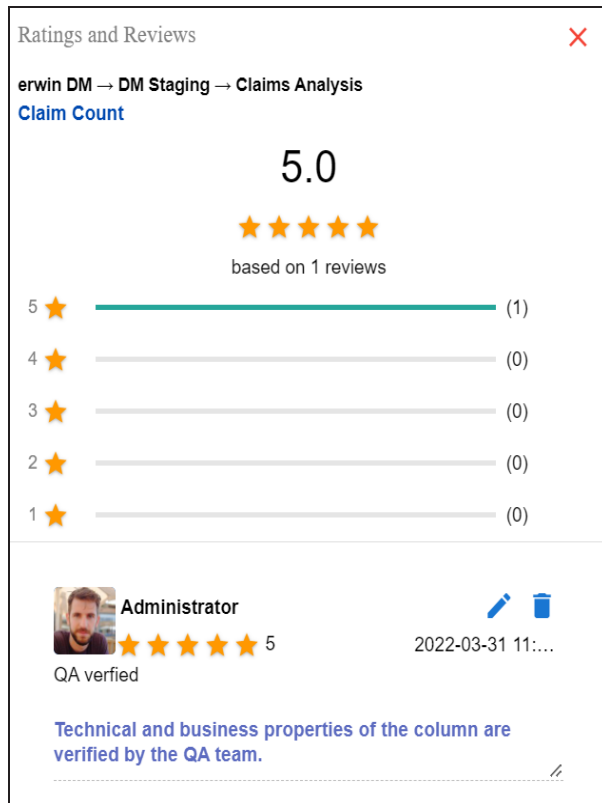
Field Name	Description
Rating	Specifies the rating of the asset on a scale of one to five stars

Reviewing and Rating Assets

Field Name	Description
Title	Specifies the title of the review
Review	Specifies the review content

5. Click .

The asset is rated and reviewed. The rating and review appear on the Ratings and Reviews page.



Use the following options to manage ratings and reviews:

Edit ()

Use this option to update your rating and review.

Delete ()

Use this option to delete a rating and review.

Adding Tasks

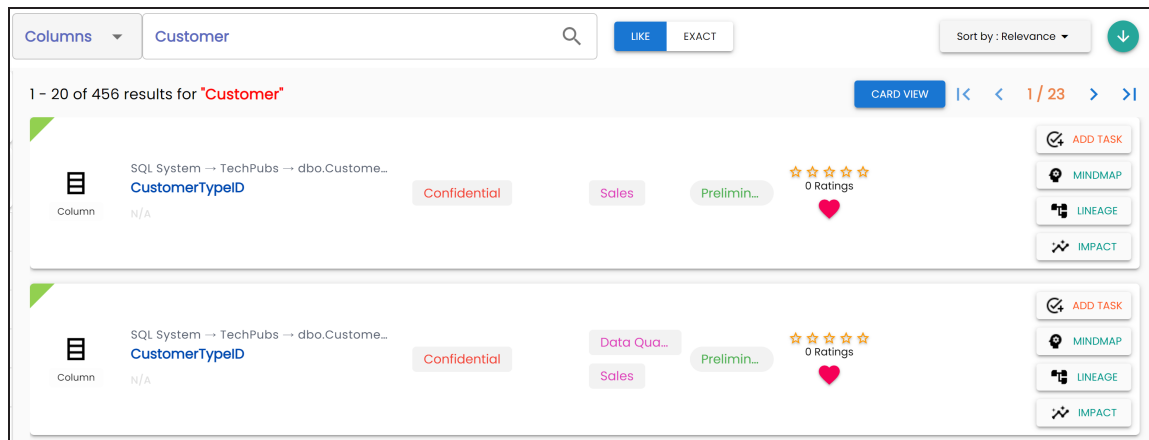
To improve productivity and collaboration, you can create tasks related to technical, business, and marketplace assets. These tasks may be to-do tasks, access requests, or issues. You can manage the task types via Action Center Settings.

To add tasks, follow these steps:

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

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

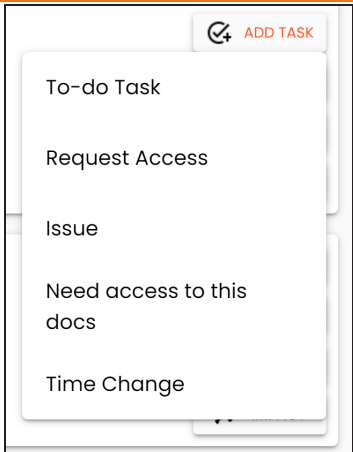
For example, in the following image, a columns list appears after entering Claim Count as the search string and selecting Columns as the asset type.



2. Click **Add Task**.

A list of task types appears.

Adding Tasks



3. Click the required task type.

The Create New Task page appears.

A screenshot of the 'Create New Task' page. The page has a blue header with a save icon and a close icon. Below the header, the title 'Create New Task' is displayed. The main section is titled 'TASK DETAILS' and contains a form. The form shows 'Task is being created on Asset' with a 'Claim Count' column icon and a 'COLUMN' label. Below this, it says 'With Task Type as' followed by a dropdown menu showing 'To-do Task' with a red 'X' icon. The 'Name' field is labeled 'COLUMN_Claim Count_' and has a character count of '19 / 200'. The 'Description' field is empty.

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

Adding Tasks

Field Name	Description
Task is being created on Asset	Specifies the asset for which the task is being created. For example, Column.
With Task Type as	Specifies the task type. For example, To-do Task.
Name	Specifies the name of the task. By default, it auto-populates with a name in the following format: <Asset_Type>_<Asset_Name>. You can edit it and rename the task. For example, Set Sensitive Classification.
Description	Specifies a description of a task. For example: Mark this asset as sensitive and classify as PII.
Important	Specifies whether the task is important
Due	Specifies the due date of the task. To set the due date, click  .
Assign Users	Specifies the users assigned to the task. You can assign DI and BU users from the list. For a business asset, users with Data Governance (DG) assignment and the one who creates the task are assigned to the task by default.
External user emails	Specifies the email ID of external users. For example, chris.harris@quest.com

5. Click .

The task is created and saved. To edit the task details and attach relevant documents, click . You can manage tasks via My Action Center.

Adding Tasks

The screenshot shows a task details window with a blue header. The header contains a task icon, the title 'Set Sensitive Clas...', a 'Created by' dropdown showing 'Me', and a timestamp 'Apr-05-2022 06:11:58'. Below the header are two tabs: 'TASK DETAILS' (active) and 'CHAT'. The 'TASK DETAILS' tab contains the following sections:

- Name:** 'Set Sensitive Classification' with a character count of '28 / 200'.
- Description:** 'Mark this asset as sensitive and classify as PII.' with a character count of '49 / 500'.
- Attachments & URLs:** A button labeled 'DOCUMENTS' with a red notification badge showing '0'.
- Assigned Assets:** A list item 'Claim Count' with the subtext 'COLUMN' and an eye icon.
- Type:** A dropdown menu currently showing 'To-do Task'.

Chat

Use the Chat tab to send messages to the assigned and external users of a task.

On the **Chat** tab, enter your message in the text box and use the following options:

Assigned

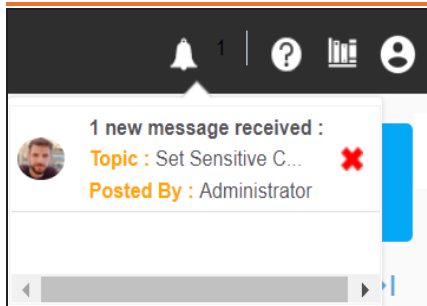
Use this option to send messages to the assigned users.

External Users

Use this option to send messages to external users.

Users are notified via Messaging Center.

Adding Tasks



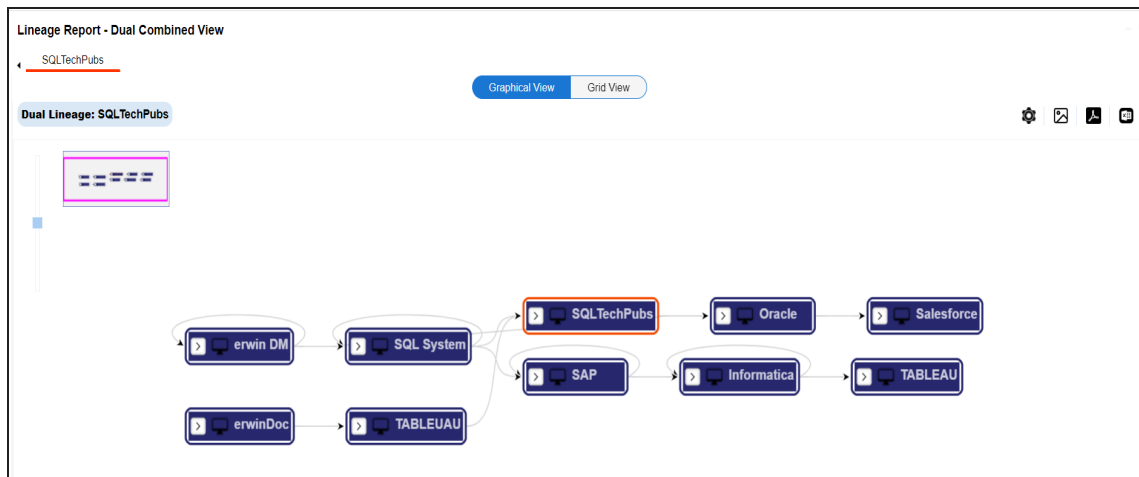
Viewing Lineage

You can view the lineage of a technical asset and trace its origin, transformations, and destination after source to target mappings.

To view lineage, on the <Technical_Asset> tile or page, click **Lineage**.

The Lineage Report - Dual Combined View page appears. By default, the lineage appears in graphical view.

For example, the following image displays dual lineage of a system, SQLTechPubs.



You can view lineage at system, environment, table, and column levels. For more information, on analyzing lineage at different levels, refer to the following:

- [System](#)
- [Environment](#)
- [Table](#)
- [Column](#)

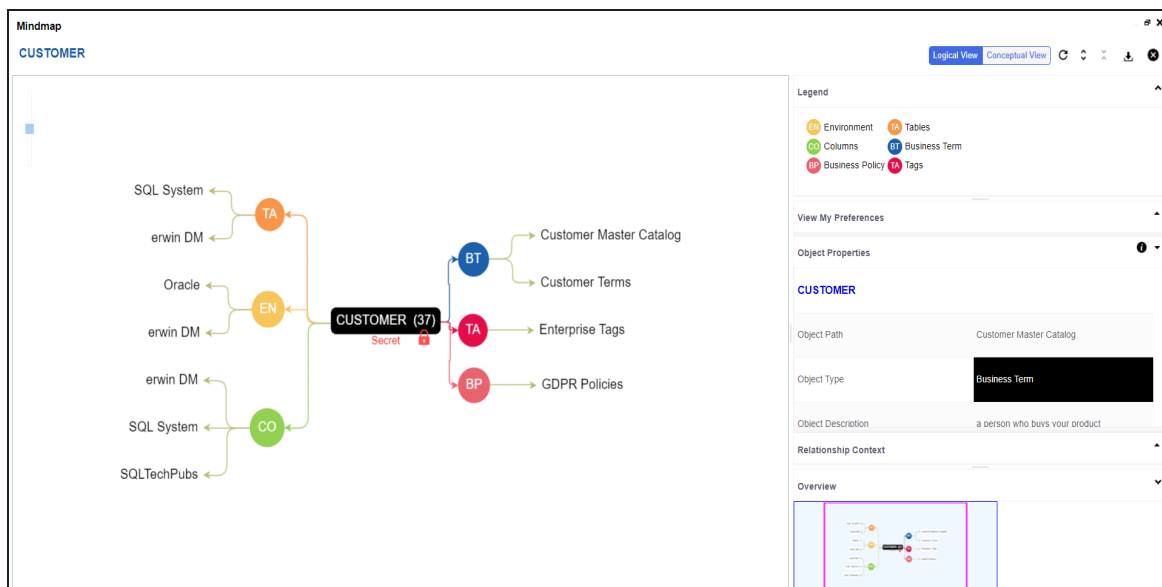
Viewing Mind Maps

A mind map is a pictorial representation of associated assets. You can view sensitivity of assets, logical and expanded logical name of tables and columns, and relationships between assets. You can also filter the mind map contents based on asset types and relationships to view a focused mind map.

To view mind map, on the asset tile or page, click **Mind Map**.

The mind map of the asset appears.

For example, in the following image displays mind map of a business term, Customer.



With Discover Assets, you can view and analyze mind maps of both [technical](#), [business](#), and marketplace assets.

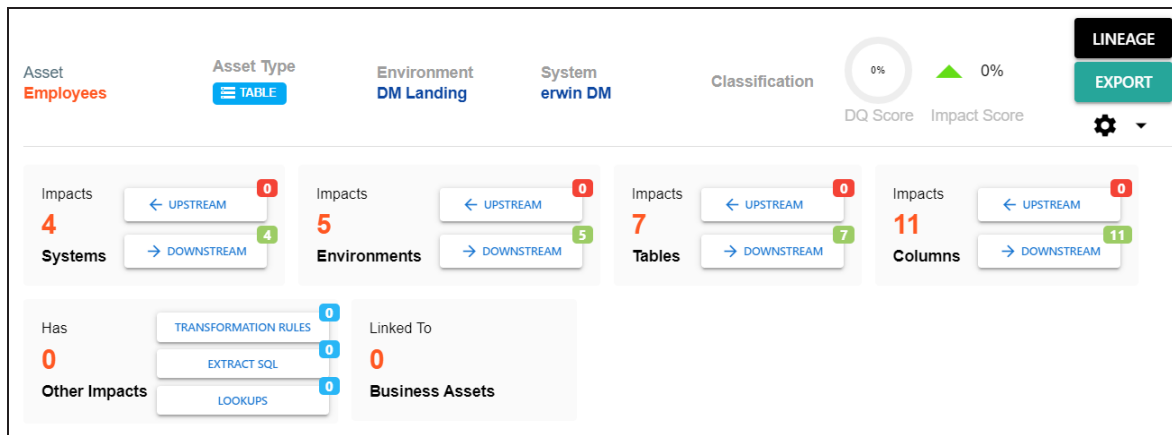
Viewing Impact

A technical asset may act as a source, target, or both in mapping projects. Impact analysis of a technical asset displays the impact of the technical asset as source and target, and also display links to the source to target mappings. Additionally, impact analysis of tables and columns displays:

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

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

The asset impact page appears.



Dependent assets are linked to source and target mapping. Click a card to view upstream or downstream dependencies of the selected asset.

Viewing Impact

Asset
Employees

Asset Type
TABLE

Environment
DM Landing

System
erwin DM

Classification
0%
DQ Score Impact Score

LINEAGE
EXPORT

Impacts
4
Systems

Impacts
5
Environments

Impacts
7
Tables

Impacts
11
Columns

Has
0
Other Impacts

Linked To
0
Business Assets

Upstream (0) Downstream (5)

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

You can click the link under the Mapping column to view and update mappings.

Mapping

Map Spec Overview

Map Spec Grid

Graphical Designer

Source Extract SQL

Target Update Strategy

Testing Notes

Map Spec Docs

Assignment

Release Information

User Defined1

User Defined2

User Defined3

User Defined4

User Defined5

Extended Properties

Map Details

Workflow Status

Audit History

Viewing Impact

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

Comparing Assets

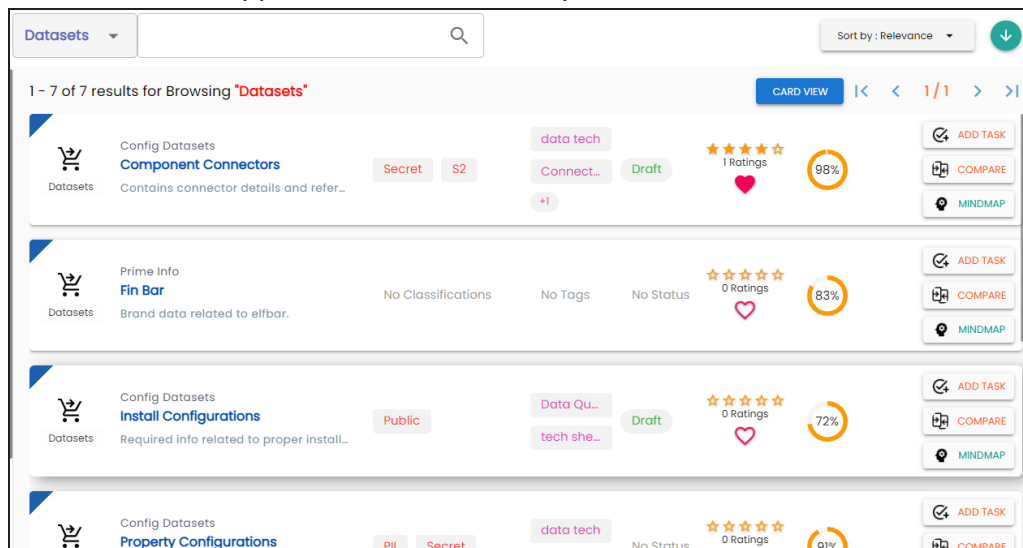
You can compare business and marketplace assets side by side to gain more insight and see asset property differences using Discover Assets. You can compare them based on similarity or distinct properties and more.

This topic walks you through comparing datasets (marketplace asset). Similarly, you can compare business assets using the Discover Assets module.

To compare datasets, follow these steps:

1. From the Discover Assets module, click Datasets.

The datasets list appears in the List View by default.



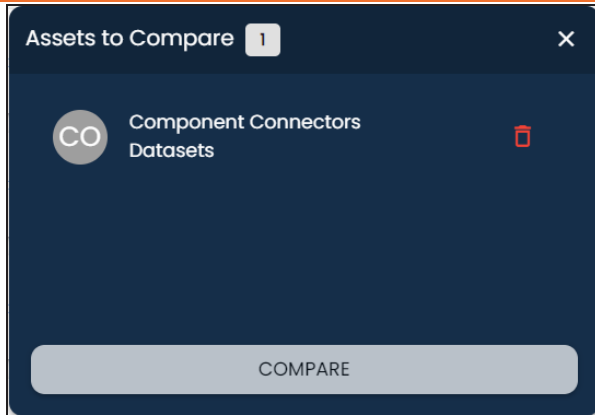
2. Select a dataset that you want to compare and then, click .

The Asset to Compare pane appears.



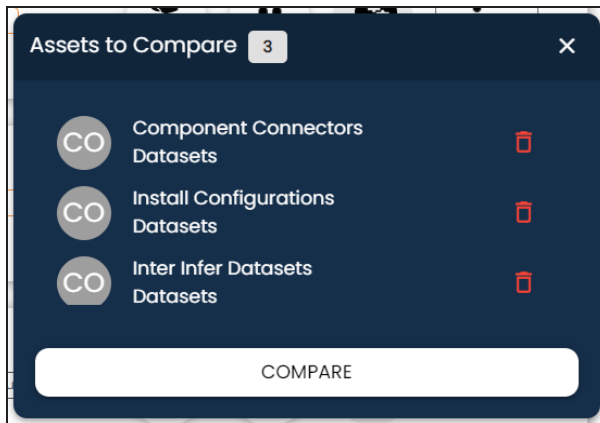
You can select up to five assets for comparison.

Comparing Assets



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

3. Choose other required assets that you wish to compare and then click  **COMPARE**.
Selected assets are added to the Asset to Compare sheet.

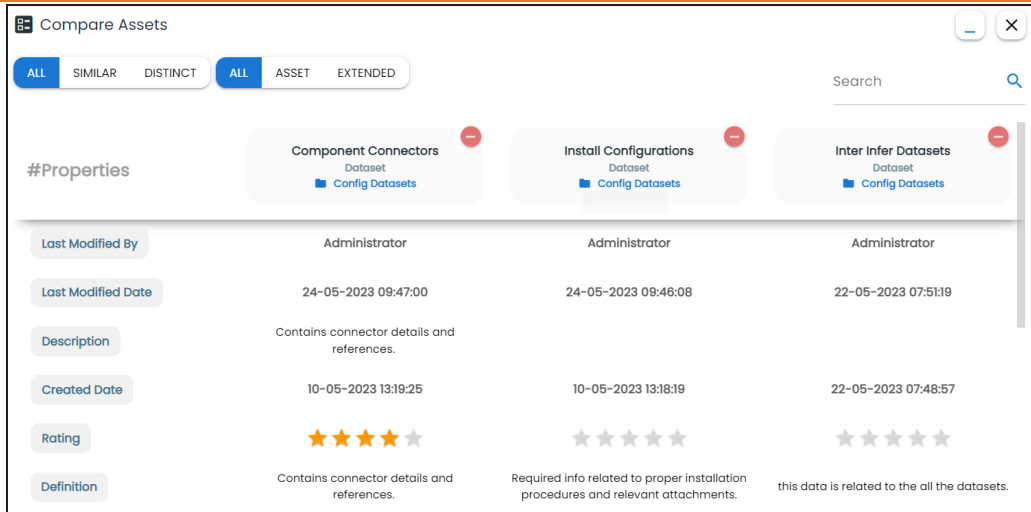


You can click  to remove assets from the compare list.

4. Click **Compare**.

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

Comparing Assets



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

On the Compare Assets pane, you can compare assets using the property filter options to enhance the business and marketplace asset 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 in comparison.

Comparing Assets

Compare Assets			
ALL	SIMILAR	DISTINCT	ALL ASSET EXTENDED
Search			
#Properties	Component Connectors Dataset Config Datasets	Install Configurations Dataset Config Datasets	Inter Infer Datasets Dataset Config Datasets
Last Modified By	Administrator	Administrator	Administrator
SDI Description			
OBJECT_TYPE	Dataset	Dataset	Dataset
Data Value Score	BRONZE	BRONZE	BRONZE
Workflow Status	Draft	Draft	Draft
Created By	Administrator	Administrator	Administrator
Catalog Hierarchy	Config Datasets	Config Datasets	Config Datasets

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 in comparison.

Compare Assets			
ALL	SIMILAR	DISTINCT	ALL ASSET EXTENDED
Search			
#Properties	Component Connectors Dataset Config Datasets	Install Configurations Dataset Config Datasets	Inter Infer Datasets Dataset Config Datasets
Last Modified Date	24-05-2023 09:47:00	24-05-2023 09:46:08	22-05-2023 07:51:19
Description	Contains connector details and references.		
Created Date	10-05-2023 13:19:25	10-05-2023 13:18:19	22-05-2023 07:48:57
Rating	★★★★★	★★★★★	★★★★★
Definition	Contains connector details and references.	Required info related to proper installation procedures and relevant attachments.	this data is related to the all the datasets.
Name	Component Connectors	Install Configurations	Inter Infer Datasets

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

All

Use this option to view all asset properties for comparison.

Asset

Comparing Assets

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

Compare Assets

ALLSIMILARDISTINCT

ALLASSETEXTENDED

Search

#Properties	Component Connectors Dataset Config Datasets	Install Configurations Dataset Config Datasets	Inter Infer Datasets Dataset Config Datasets
Last Modified By	Administrator	Administrator	Administrator
Last Modified Date	24-05-2023 09:47:00	24-05-2023 09:46:08	22-05-2023 07:51:19
Description	Contains connector details and references.		
Created Date	10-05-2023 13:19:25	10-05-2023 13:18:19	22-05-2023 07:48:57
Rating	★★★★★	★★★★★	★★★★★
Definition	Contains connector details and references.	Required info related to proper installation procedures and relevant attachments.	this data is related to the all the datasets.

Extended

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

Compare Assets

ALLSIMILARDISTINCT

ALLASSETEXTENDED

Search

#Properties	Component Connectors Dataset Config Datasets	Install Configurations Dataset Config Datasets	Inter Infer Datasets Dataset Config Datasets
Business Initiative	Future progress taken in to account.	Needs review time to time. This keeps the Install docs up to date.	
Expected Insights	NA	Coming soon.	

Proposing Assets

You can now propose new business and marketplace assets, and view the proposed assets from other users.

This topic walks you through proposing business terms. Similarly, you can propose other business and marketplace assets using the Discover Assets module.

To propose business terms, follow these steps:

1. From the Discover Assets module, click **Business Terms**.

The business terms list appears in the List View by default.

1 - 20 of 10244 results for Browsing "Business Terms"

Proposed Assets

Sort by : Relevance

1 / 513

Monetary Terms → Macroecono...

3-Hydroxyl End

The hydroxyl group that is ...

LEN(D3)

PII Restricted Data Q... Medical Preli...

1 Ratings

ADD TASK COMPARE MINDMAP

TechPubs2

3-A Sanitary Standards ...

3-A Sanitary Standards, In...

LEN(D2)

PHI No Tags Preli...

0 Ratings

ADD TASK COMPARE MINDMAP

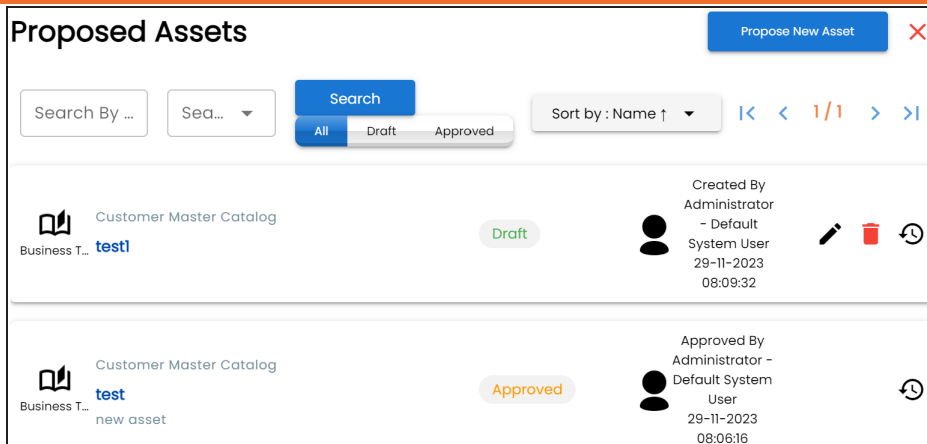


Ensure that you have permission to propose new assets. If you do not have access, then contact your administrator.

2. Click **Proposed Assets**.

The Proposed Assets page appears.

Proposing Assets



You can view proposed assets from other users, or you can propose a new.

3. Click **Propose New Asset**.

The Propose New Asset page appears.

The screenshot shows the "Propose New Asset" form. It has a title bar with a "+" icon and a close button. The form contains several input fields: "Asset Type" with a dropdown menu showing "Business Terms", "Domain/Catalog" with a link icon, "Asset Name", and a "Description" field with a rich text editor toolbar. The toolbar includes options for alignment, bullet points, bold, italic, underline, link, unlink, print, and other formatting tools.

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

Field	Description
Asset Type	Specifies the type of asset
Domain/Catalog	Specifies the domain or catalog name of business terms. You can

Proposing Assets

Field	Description
	either create a new domain or catalog or click ↔ to select the existing catalogs from the list.
Asset Name	Specifies the name of the asset
Description	Specifies the description of the asset type

5. Click **Save and Exit**.

A new proposed asset is created and the status is changed to Draft.

The screenshot shows a web interface for managing assets. At the top, there is a search bar with 'Search By A...' and a dropdown menu, a 'Search' button, and a 'Sort by : Name ↑' dropdown. Below the search bar are three tabs: 'All', 'Draft', and 'Approved'. The 'Draft' tab is selected. The main content area displays a single asset card for 'Customer Master Catalog'. The card includes a book icon, the text 'Business Te...', 'test', and 'new asset'. To the right of the card is a green 'Draft' status label. Further right, there is a user profile section showing 'Created By Administrator - Default System User' with a timestamp '28-11-2023 06:44:22'. At the bottom right of the card are three icons: a pencil (Edit), a trash can (Delete), and a circular arrow (History).

Use the following options to work on proposed assets:

Edit (✎)

Use this option to edit a proposed asset.

Delete (🗑)

Use this option to delete a proposed asset.

History (🕒)

Use this option to view all the actions performed on the proposed asset.

Once you propose an asset, it requires further action for review and approval. For more information, refer to the [Managing Proposed Business Assets](#) and [Managing Proposed Marketplace Assets](#) topics.