GUIDE

erwin Data Intelligence

Discover Assets Guide 15.0

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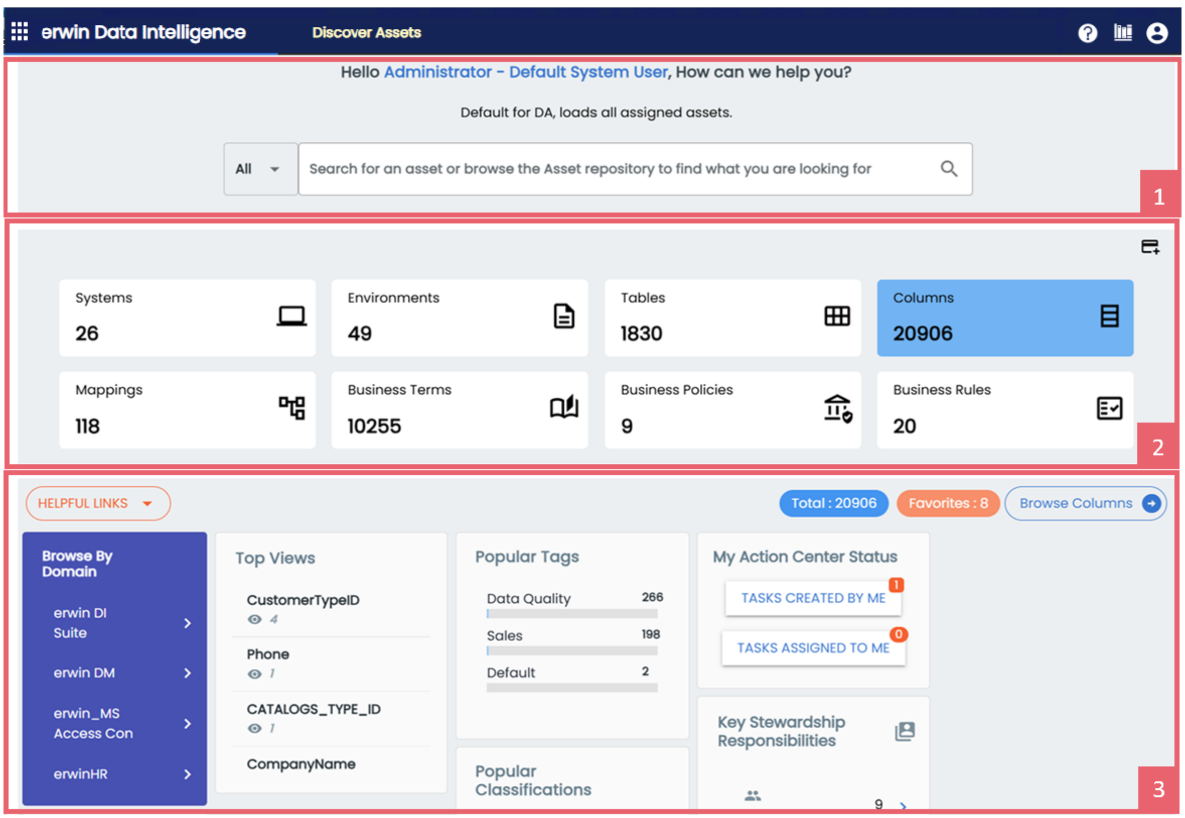
Discover Assets

To use data efficiently, it is important to be able to discover, access, and analyze it. The Discover Assets module 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, lineages, impacts, and data ratings, you can analyze data assets, improve data accessibility, promote collaboration, and make data governance decisions.

This section walks you through the interface of the module and 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.

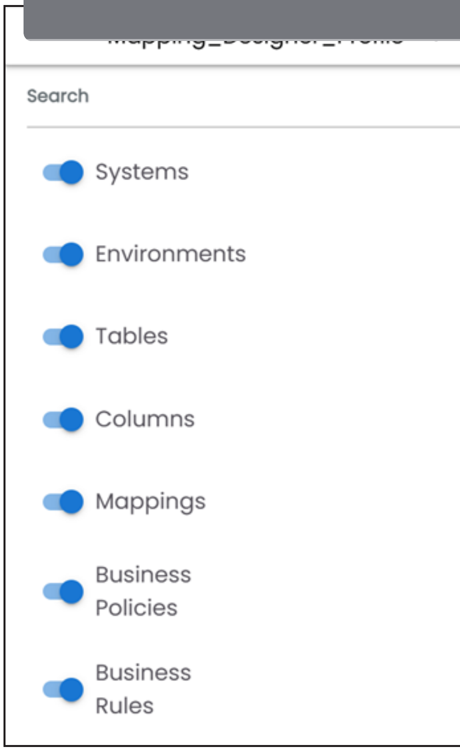


UI Section	Function
1-Search	Use this section to filter and search assets. For more information, refer to the Searching and Filtering topic.
2-Asset Summary	Use this section to browse assets by their types. For more information, refer to the Asset Summary section.
3-Asset Workspace	Use this section to view detailed information for the asset type you select in the Asset Summary section. For more information, refer to the Asset Workspace section.

Asset Summary

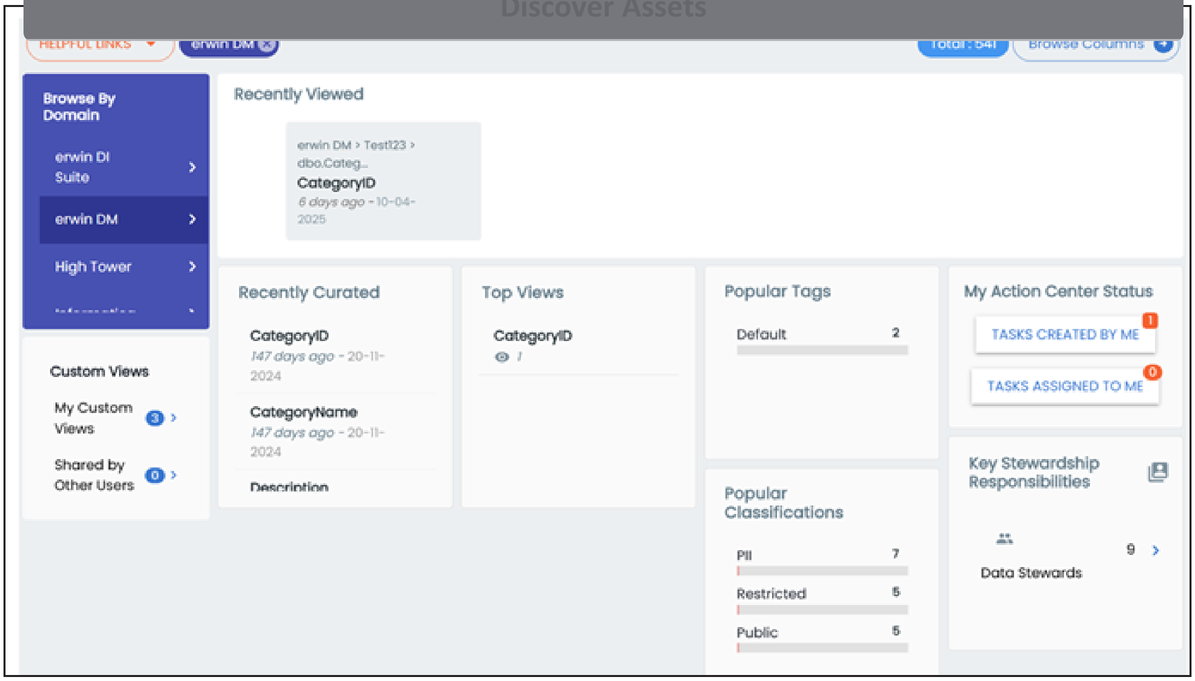
This section displays the asset type cards along with the total count of assets for each type, such as Systems, Environments, Tables, Columns, and Business Terms. You can manage the profile and the associated asset types you want to display in this section by clicking . This opens a pane on the right side where you can select the profile from the list and switch the required asset types on or off.

Additionally, you can set the asset type visibility for a particular profile using the Resource Manager module. For more information, refer to the Setting Object Types for Profiles topic.



Asset Workspace

The Asset Workspace section displays detailed data for the asset type you select in the Asset Summary section. Additionally, you can customize layout preferences. For more information, refer to the Configuring Discover Assets topic. For example, the following image displays the preferences for the Columns asset type.



UI Section	Function
1-Browse By Domain	Use this pane to browse through the assets by their domains.
2-Custom Views	Use this pane to browse through the assets with saved and shared view.
3-Recently Viewed	Use this pane to browse through your recently viewed assets.
4-Recently Curated	Use this pane to browse through your recently modified assets.
5-Top Views	Use this pane to browse through the assets with highest number of views with a view count.
6-Popular Classifications	Use this pane to browse through the assets with the mentioned tags and total number of assets with that tag.
7-My Action Center Status	Use this pane to browse through the tasks created by you or assigned to you.

F[illegible]e erwin DM domain in the Asset Workspace section, you view results for columns associated with the erwin DM system. You can choose from options such as Top Views or Popular Classifications to view and browse your search results.

Additionally, the following options are available for all asset types:

Button	Function
1-Helpful Links	Use this option to browse available training material for the selected asset type.
2-Total: <number>	Use this option to view the list of the assets. This displays the total number of assets for the selected asset type.
3-Favorites: <count>	Use this option to browse your favorite assets of the selected asset type.
4-Browse <asset type>	Use this option to browse all the assets of selected type.

To know more about using the Discover assets module to browse and update assets, refer to the following topics:

- Environments
- Mappings
- Business Terms
- Datasets

Similarly, you can discover other technical, business, and marketplace assets using the Discover Assets module.

You can also enrich and analyze assets by:

- Reviewing and Rating Assets
- Adding Tasks
- Viewing Mind Maps
- Viewing Lineages
- Viewing Impacts

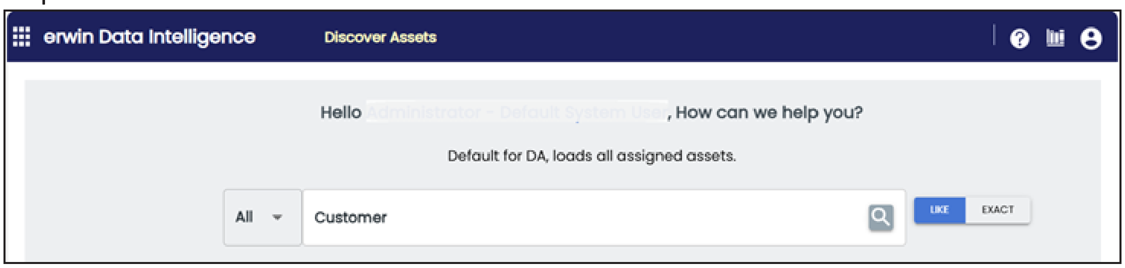
- Comparing Assets
- Proposing Assets

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. Select the required search term or enter a new one.



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

   Like

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

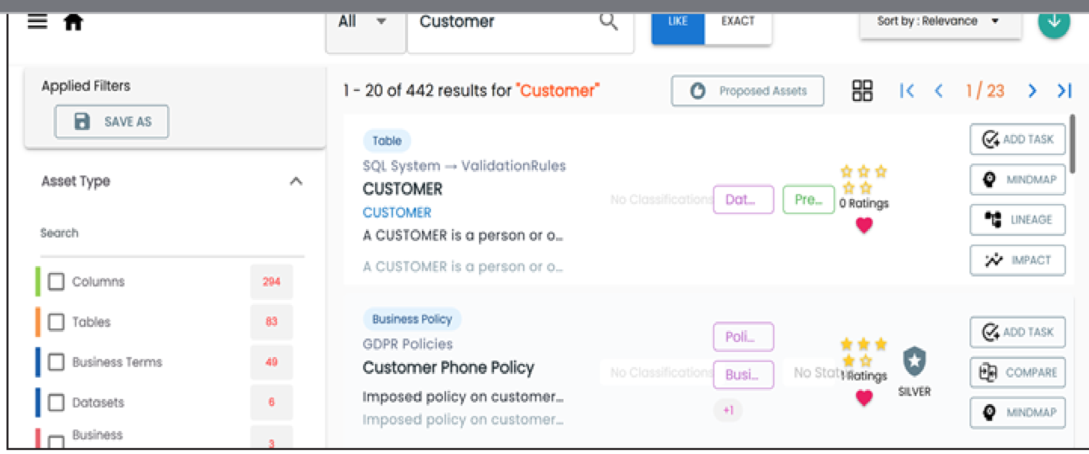
   Exact

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

2. Click 🔍 or press **Enter**.

   Based on your search criteria, search results appear.

   For example, in the following image, 442 results are displayed for a Like search with keyword, Customer.

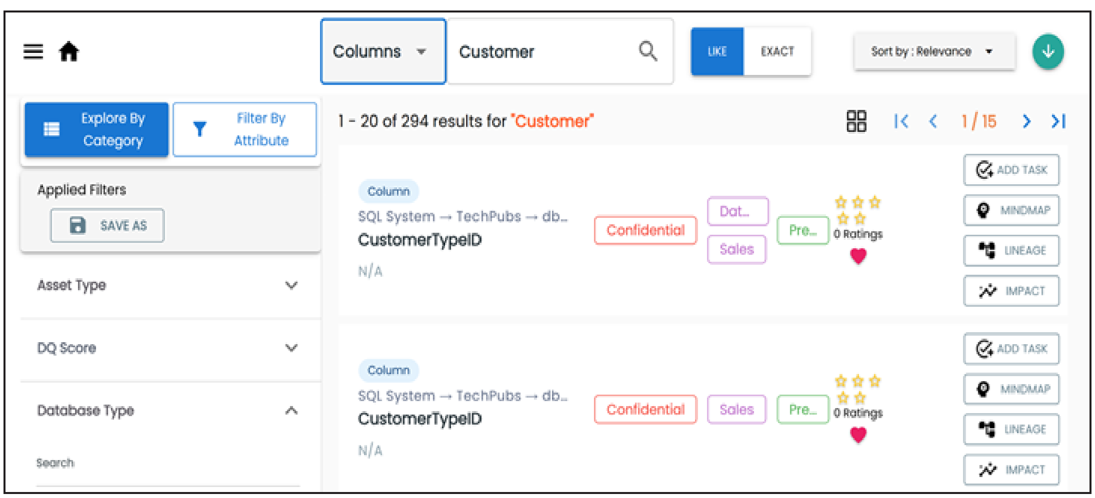


3. In the search box, click **All** and select your asset type to filter search results further based on asset types. For example, Columns.

   The list of available filters changes depending on asset type.

   For example, for the keyword, Customer, and asset type, Columns, the Like search displays 294 results. Apart from the asset type, search results also display 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.

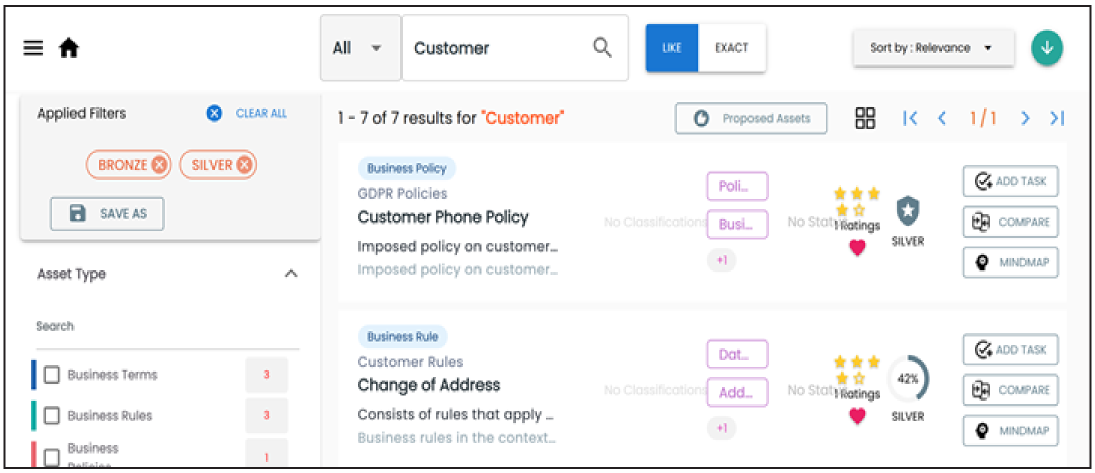


types.

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

   The selected classifications are added to the Applied Filters list, and the 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 have 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 narrows down to 7 results.

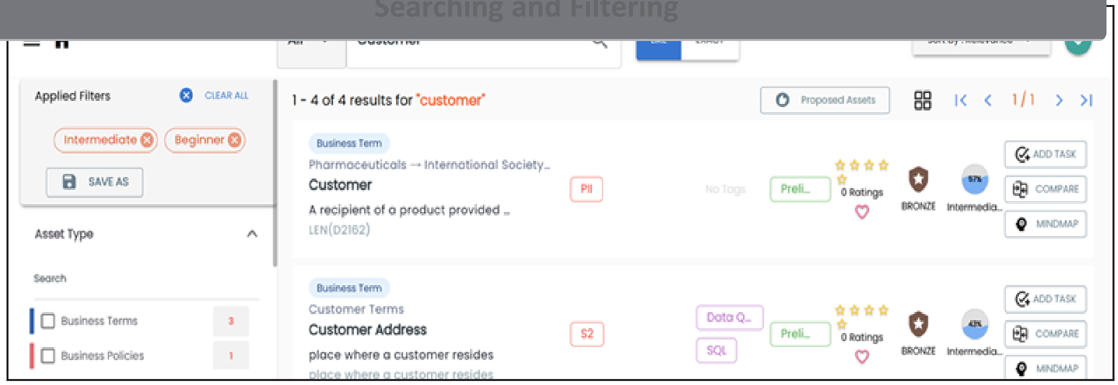


6. In the filters pane under **Maturity Level**, select maturity level classifications, and then click **Apply Filters**.

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

   You can view maturity level certification for different assets here based on the classifications you have selected in the Applied Filters list.

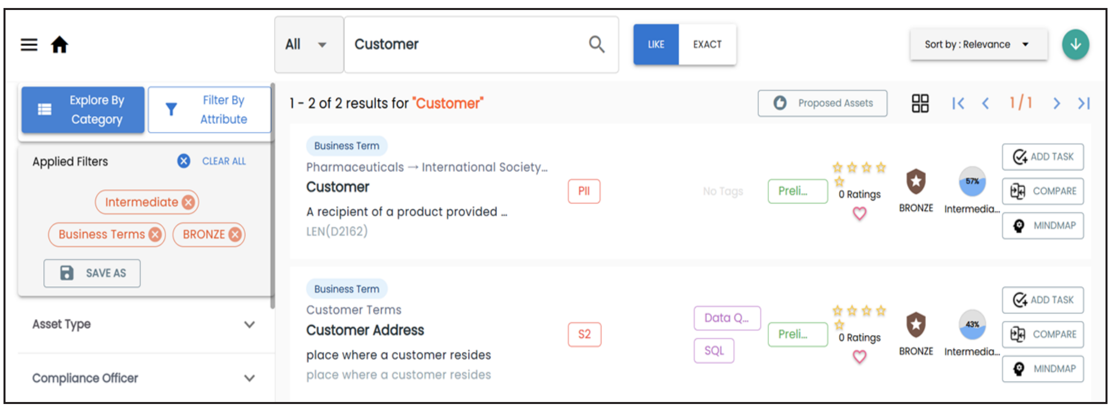
   For example, in the following image, Beginner and Intermediate are added to the Applied Filters list and the search result narrows down to 4 results.



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

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

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

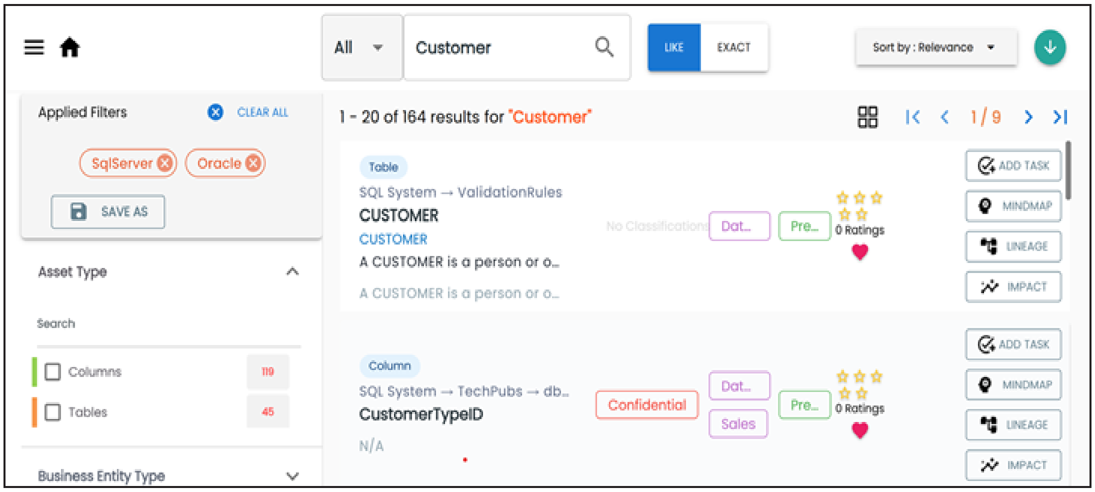


Data Value Score and Maturity Level Certification are available for business and data marketplace assets such as business terms, business policies, datasets, and AI models.

Filters.

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

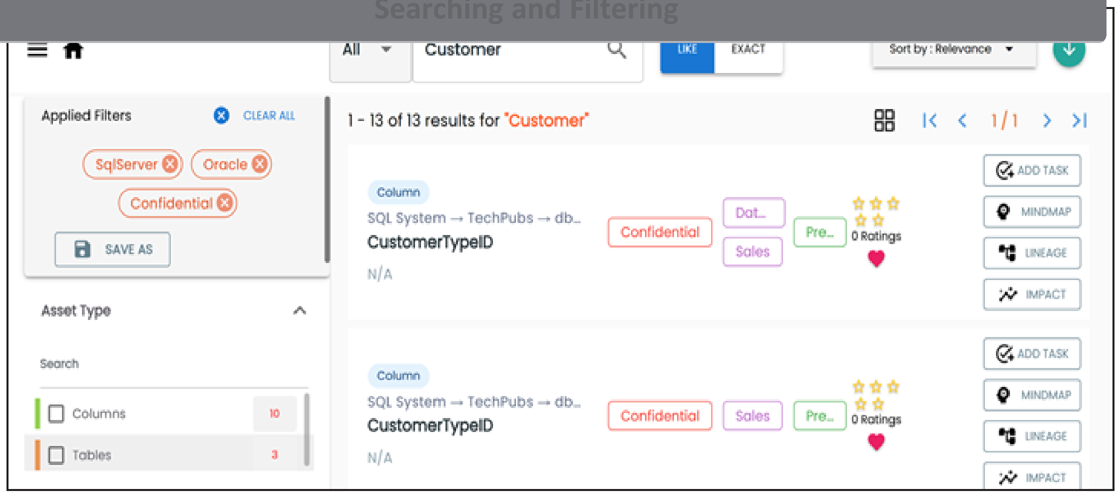
For example, in the following image, SqlServer and Oracle are added to the Applied Filters list and the search result narrows down to 164 results.



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

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

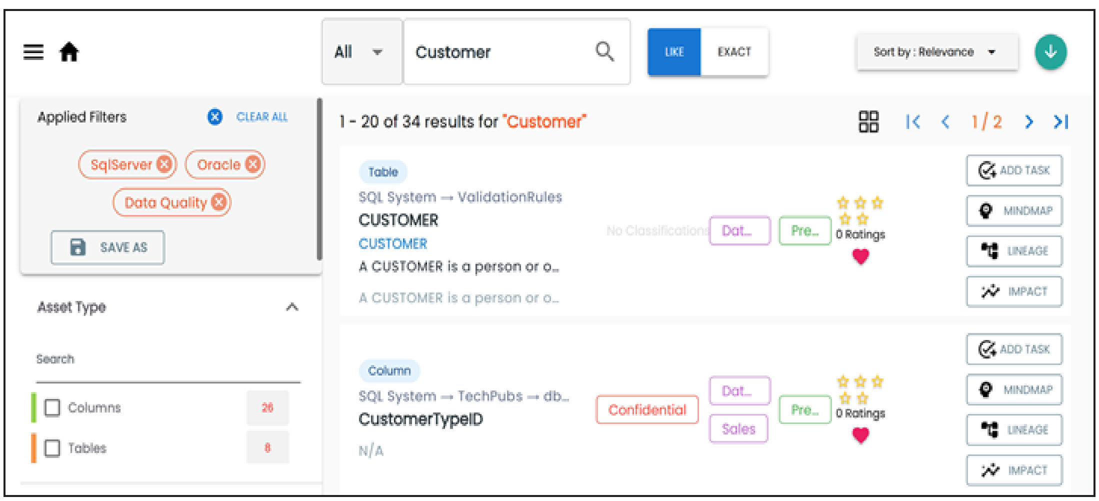
   For example, in the following image, a sensitivity classification, Confidential, is added to the Applied Filters list and the search result narrows down to 13 records.



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

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

   For example, in the following image, a tag, Data Quality, is added to the Applied Filters list and the search result narrows down to 34 results.

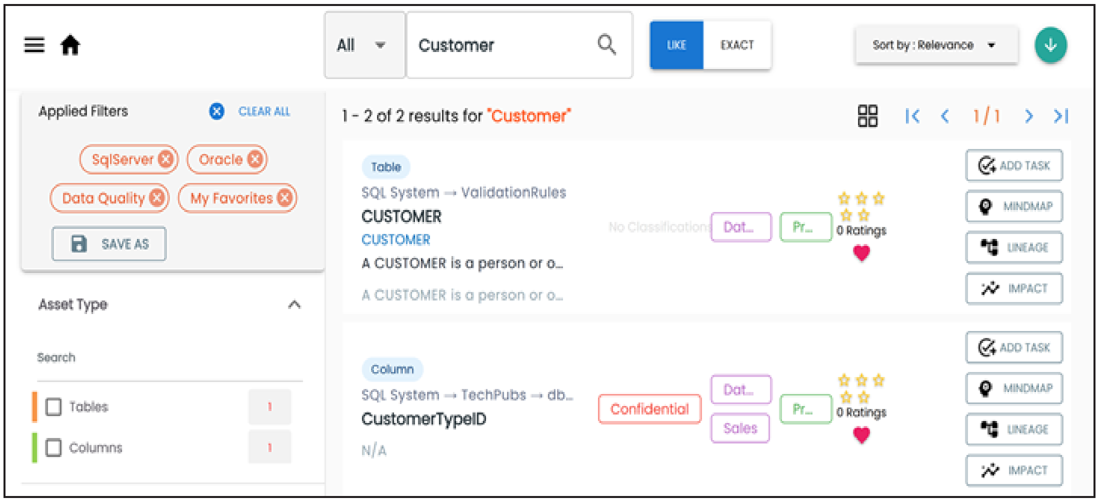


10. Switch **Show My Favourites** on.

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

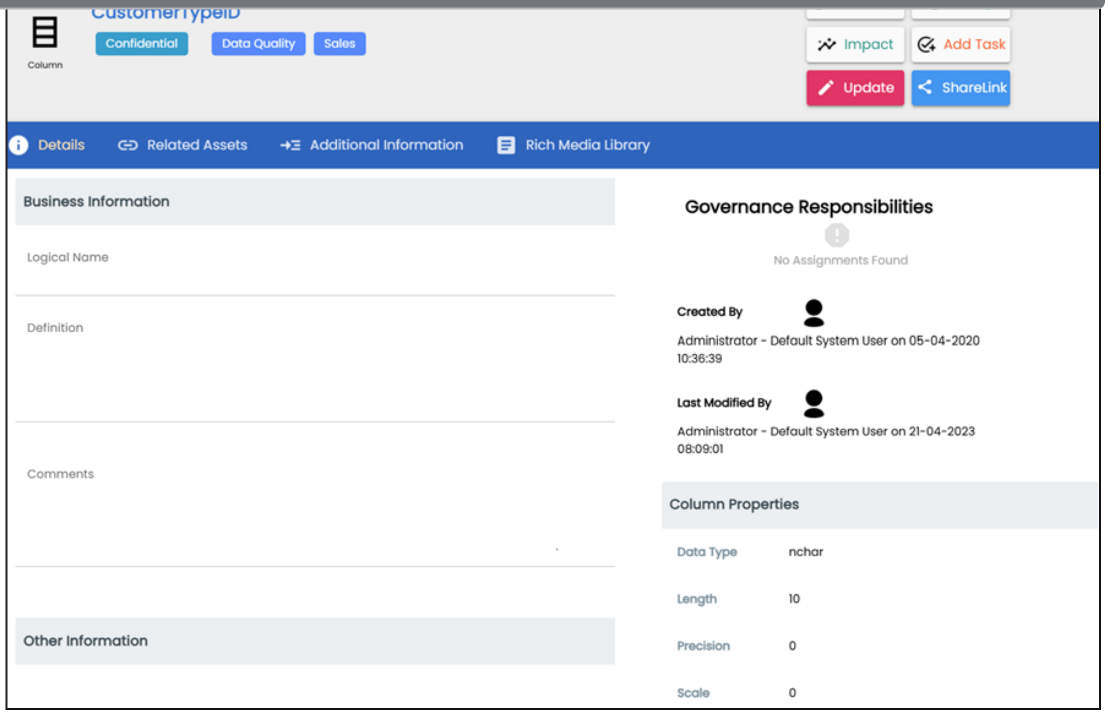
t,
and the search result narrows down to 2 results.

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



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

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



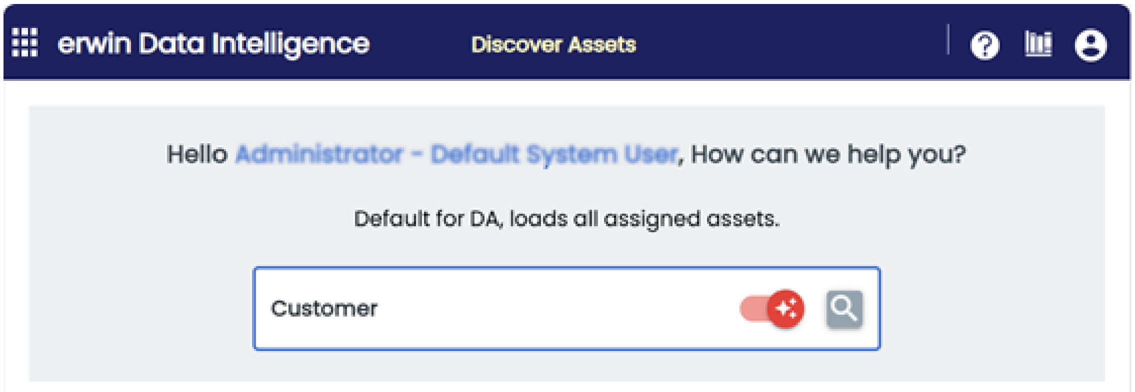
Searching and Filtering Assets with erwinAI Smart Query Assist

Finding a specific asset traditionally involves multiple steps, such as entering a keyword, (for example, Customer), applying multiple filters (for example, asset type and DQ Score), and drilling down to the exact object (for example, DBO.Customers in Northwind) to obtain the desired results. This approach can be time-consuming and complex.

erwinAI Smart Query Assist enables efficient asset discovery using natural language queries. Instead of searching and manually applying filters, you can simply type requests in plain English. It supports all the discover assets filters to make your search more accurate. The erwinAI Smart Query Assist feature automatically interprets intent, applies relevant filters, and returns accurate results. This eliminates the need for complex search steps and enhances efficiency in locating specific assets.

erwinAI Smart Query Assist is available starting from version 15.2.

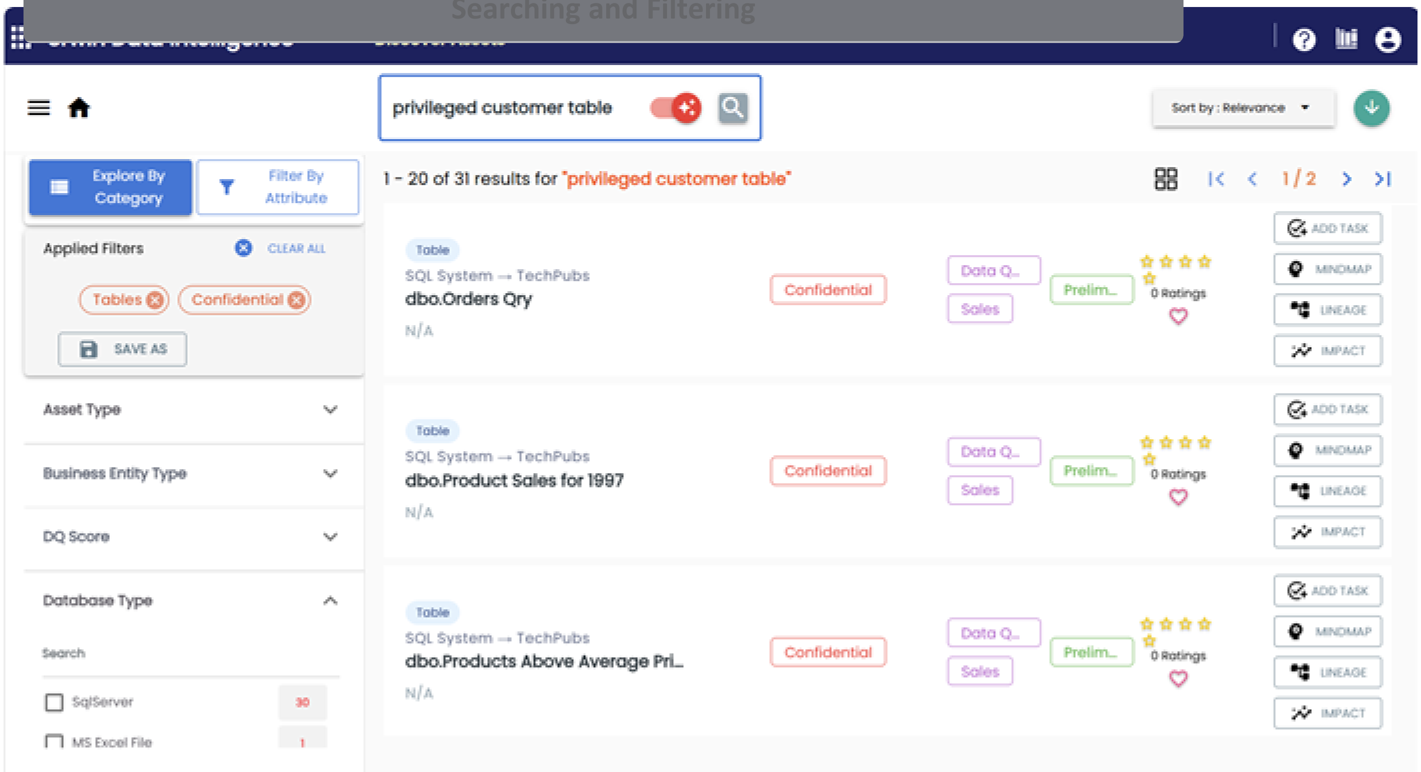
To use erwinAI Smart Query Assist, you need to switch on the toggle button ( ) in the Discover Assets search interface as shown in the following image.



> Ensure that your administrator has enabled erwinAI Smart Query Assist permission for you. The toggle button appears only when this permission is active.

Let's say you want to find the list of confidential customer tables. You can simply type any of these suggestions in plain English - "show me the confidential customer tables" or "privileged customer tables". Both these searches give the same results.

The following image shows the results for "privileged customer tables" search.



To generate the above results, erwinAI Smart Query Assist does the following:

- Identifies Customer as the search keyword
- Detects Table as the asset type
- Applies Confidential filter
- Returns relevant results

Similarly, you can get the desired search results based on your search language query.

Filtering Assets using Extended Properties

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

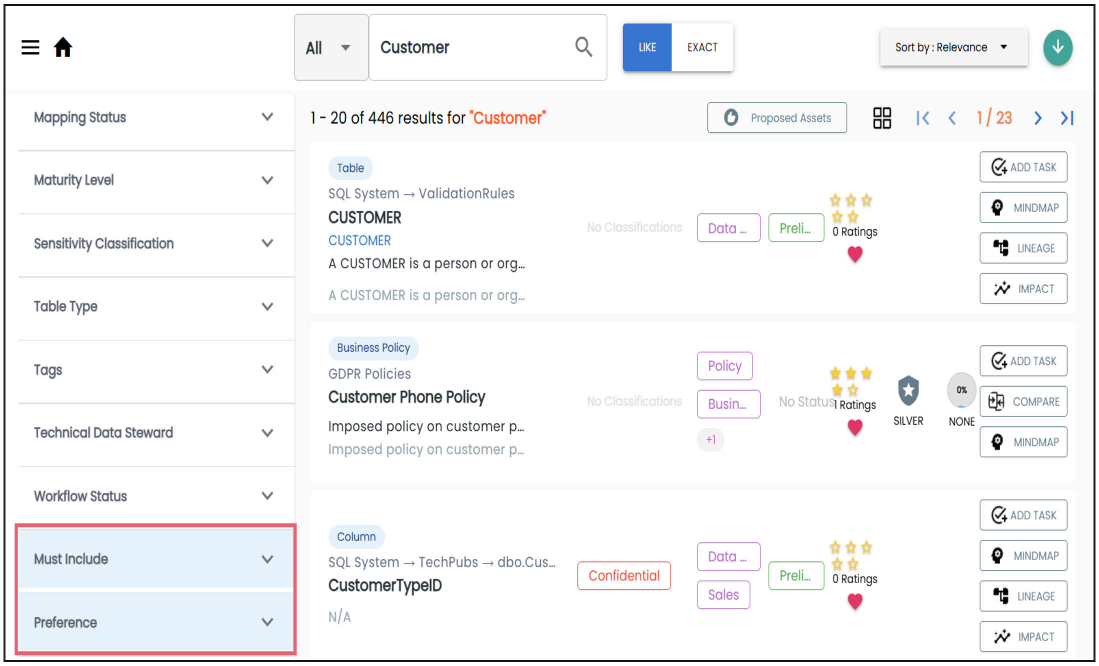
To configure an extended property and use it in the Discover Assets module as filters, refer to the configuring extended properties for business and technical assets topics.

Ensure that the:

- 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:

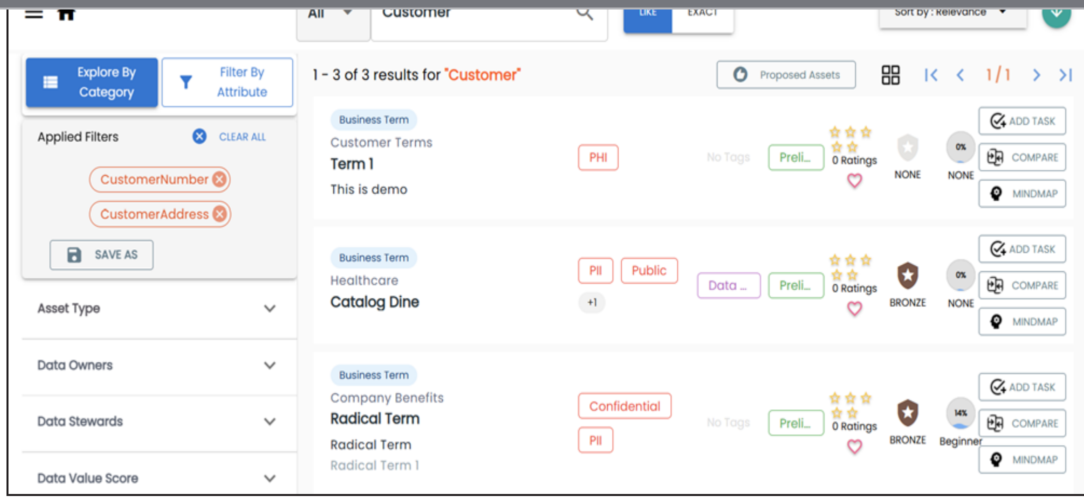
1. Based on the selection on the Discover Assets dashboard, results are displayed.



In the filter pane, the available custom filters appear below the default filter options. 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.

   For example, in the following image, CustomerAddress and CustomerNumber from the Must Include parameter are added to the Applied Filters list. This narrows the search results down to three results.



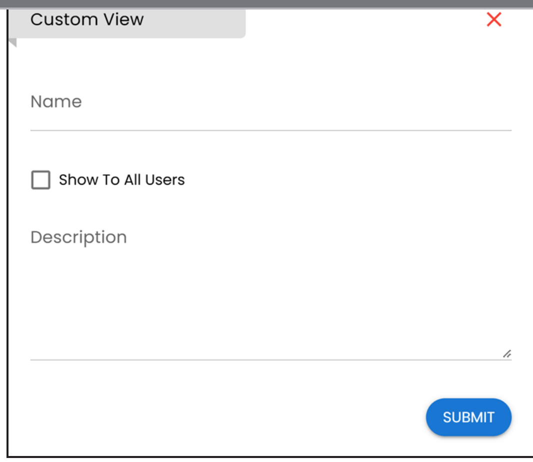
Saving Searches as Custom Views

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 searches as custom views, follow these steps:

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

   The Custom View screen appears.



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.

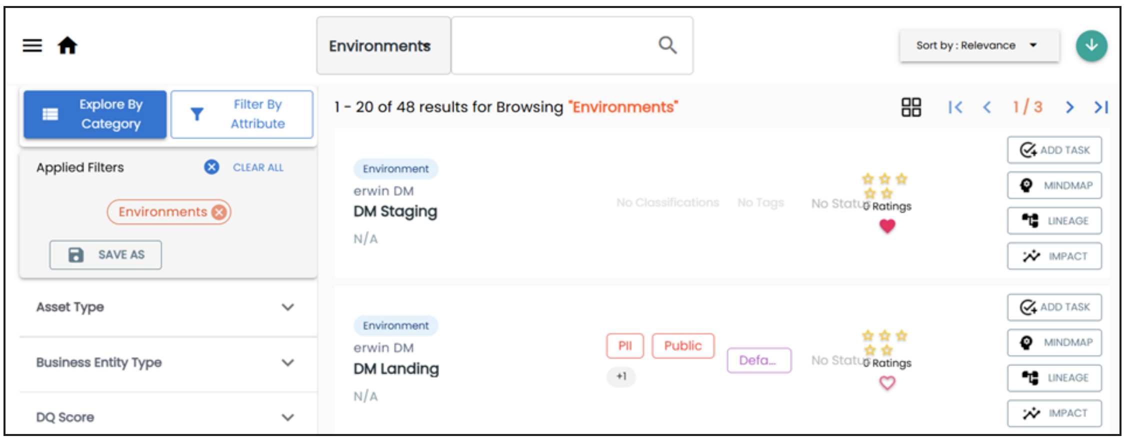
Environments

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:

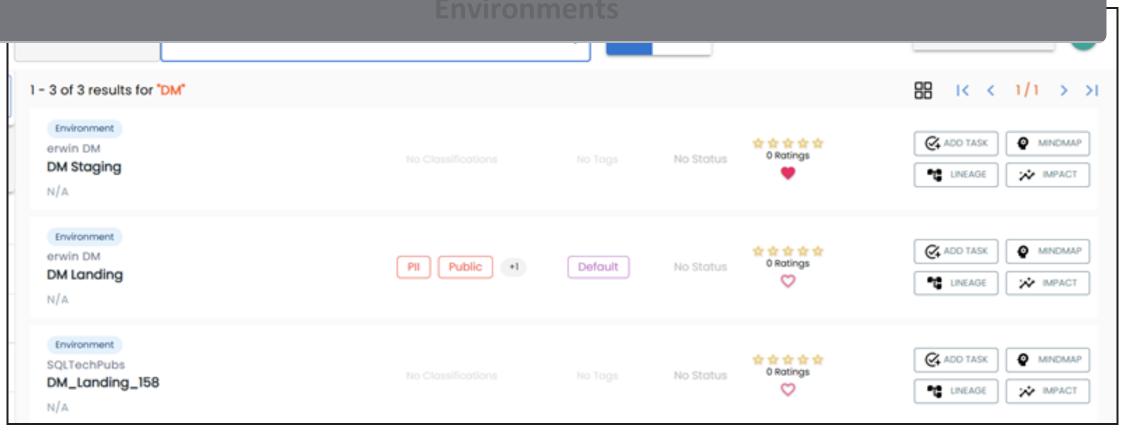
1. On the Discover Assets dashboard, click the **Environments** card then click **Browse Environments.** A list of environments appears.

   For example, in the following image, a list of 48 environments appears.

2. Use the search box to find the required environment from the list.

   For example, in the following image, a list appears after entering DM as the search string.



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.

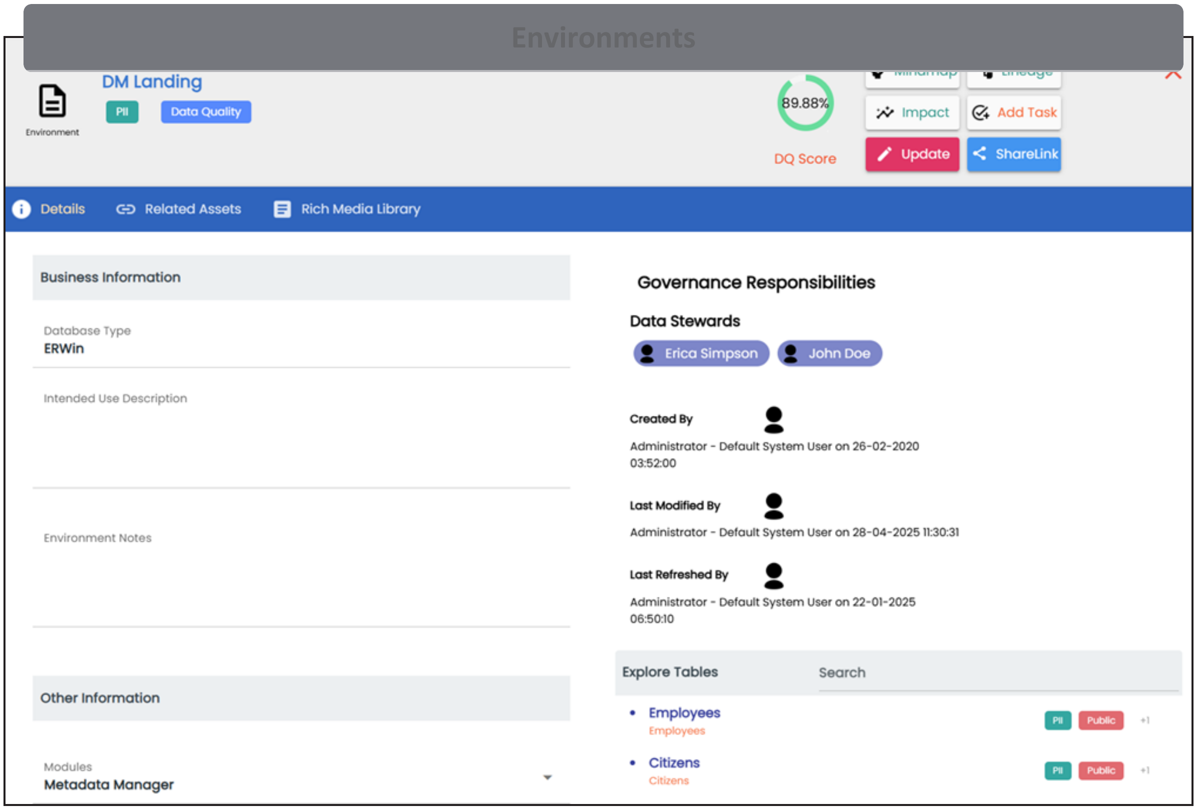
Environment Details

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.

For example, the following image shows details of the DM Landing environment. This environment's sensitivity classification is PII, DQ Score is 89.88%, and it is tagged with Data Quality.



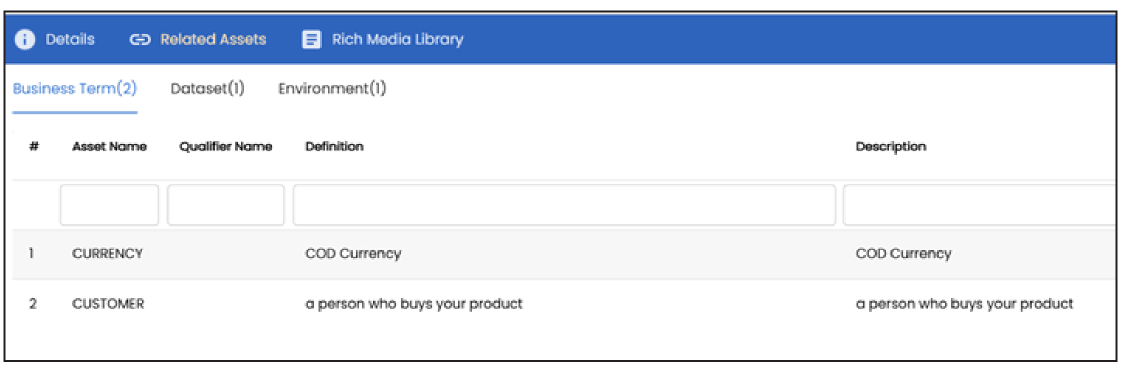
Related Assets

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

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

The list of associated assets appears.

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

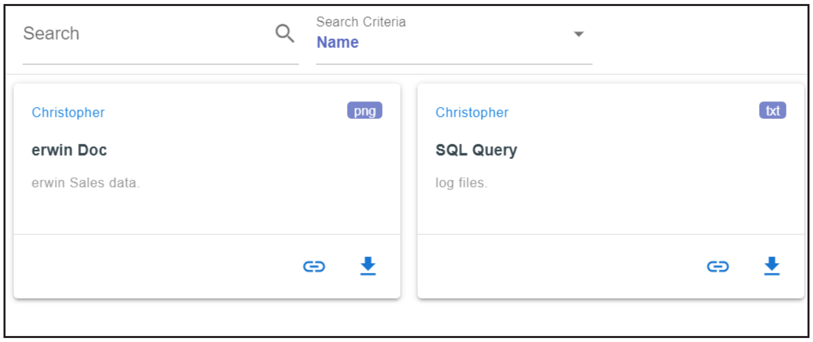


Rich Media Library

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

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

The available artifacts appear in a card view.



Use the following options to work on the artifacts:

Search

Use this option to search media.

Name

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

Link ()

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

Preview ()

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

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

- **Mindmap**: Use this option to view a pictorial representation of associated assets. For more information on viewing mind maps, refer to the Viewing Mind Maps topic.

target mappings. For more information on lineage, refer to the Viewing Lineage topic.

- **Impact**: Use this option to analyze the impact of an environment as source and target. For more information on impact, refer to the Viewing Impact topic.
- **Add Task**: Use this option to add tasks related to an environment. For more information on adding tasks, refer to the Adding Tasks topic.
- **Update**: Use this option to update environment details. This opens the Metadata Manager.
- **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.

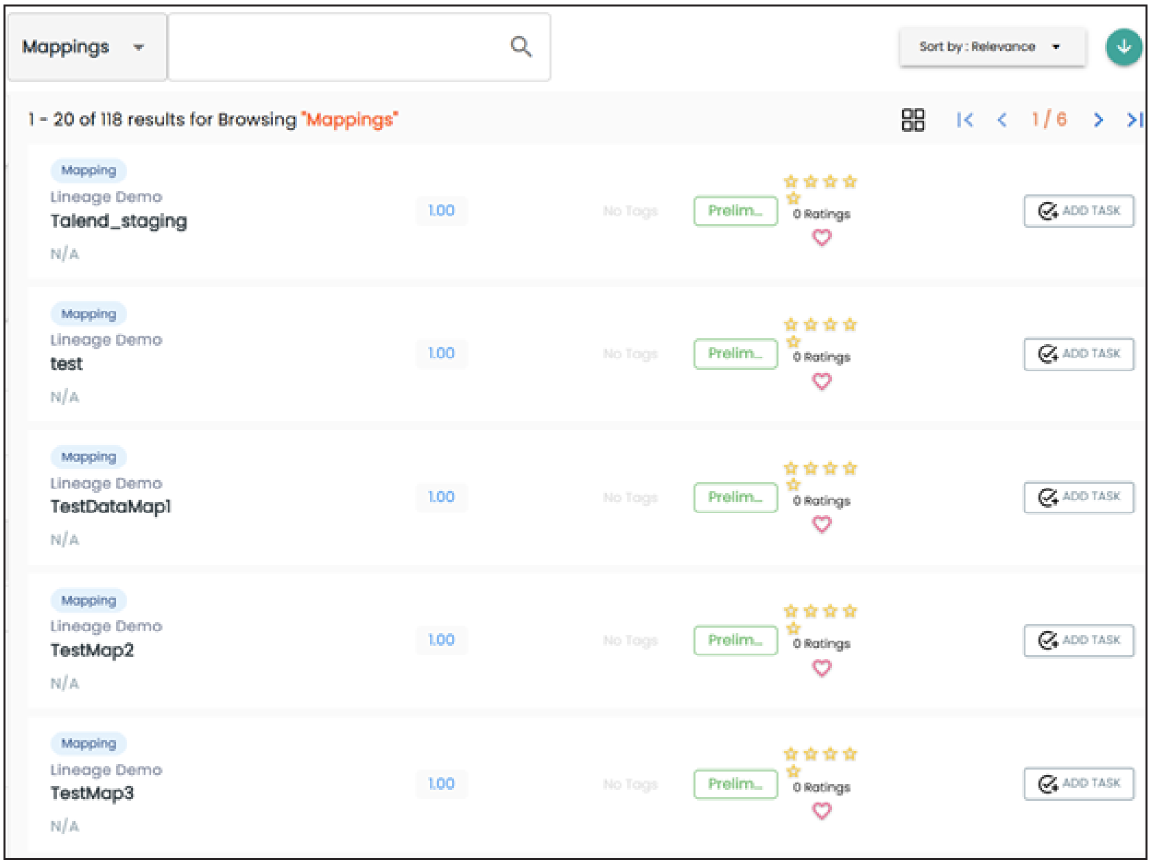
Mappings

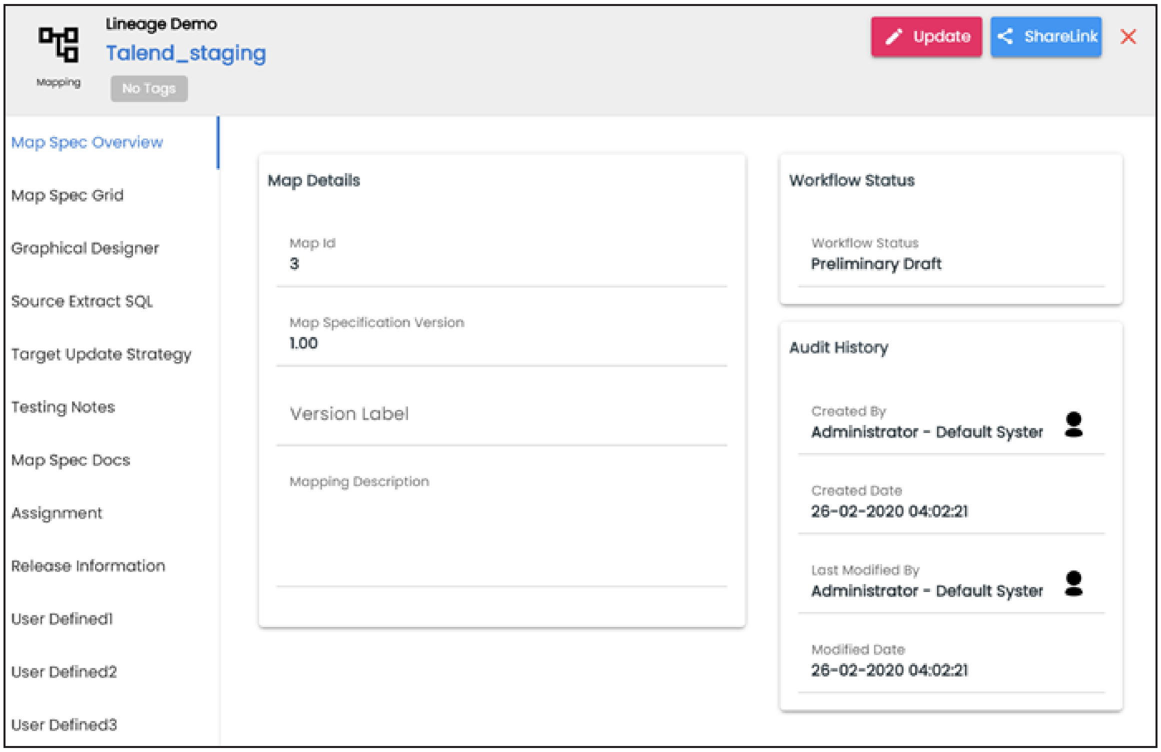
You can browse through the mappings available in your ecosystem using the Discover Assets module. The list of systems facilitates access to view, share, and update details of a mapping, all in one place.

To view the mappings list:

1. On the Discover Assets dashboard, click the **Mappings** card, then click **Browse Mappings**. A list of Mappings appears.

   For example, in the following image, a list of 118 mappings 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.
Source Extract SQL	Under this, you can view: • SQL Query relevant to a mapping specification • SQL Query Description
Target Update	Under this, you can view target update strategy of a map.

Tab	Description
Strategy	
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.

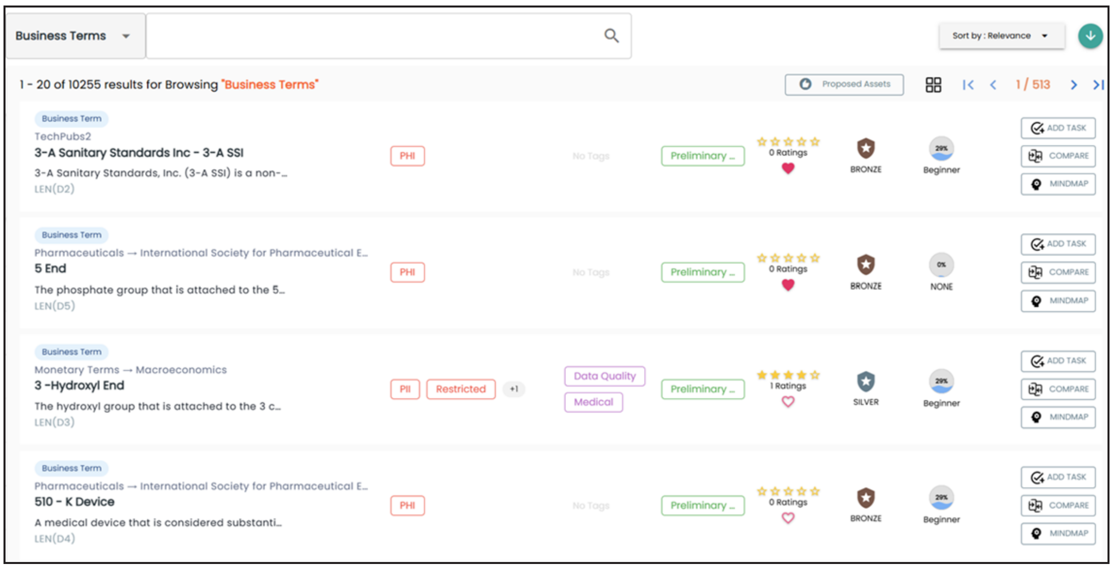
Business Terms

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, follow these steps:

1. On the Discover Assets dashboard, click the **Business Terms** card, then click **Browse Business Terms**. A list of business terms appears.

   For example, in the following image, a list of 10255 business terms appears.



2. Use the search box to find the required business term from the list. Additionally, you can use the 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:

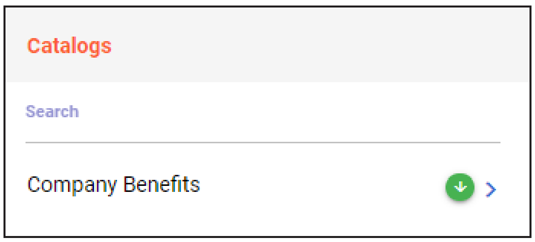
- Add task
- View mind map
- Compare assets

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:

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.

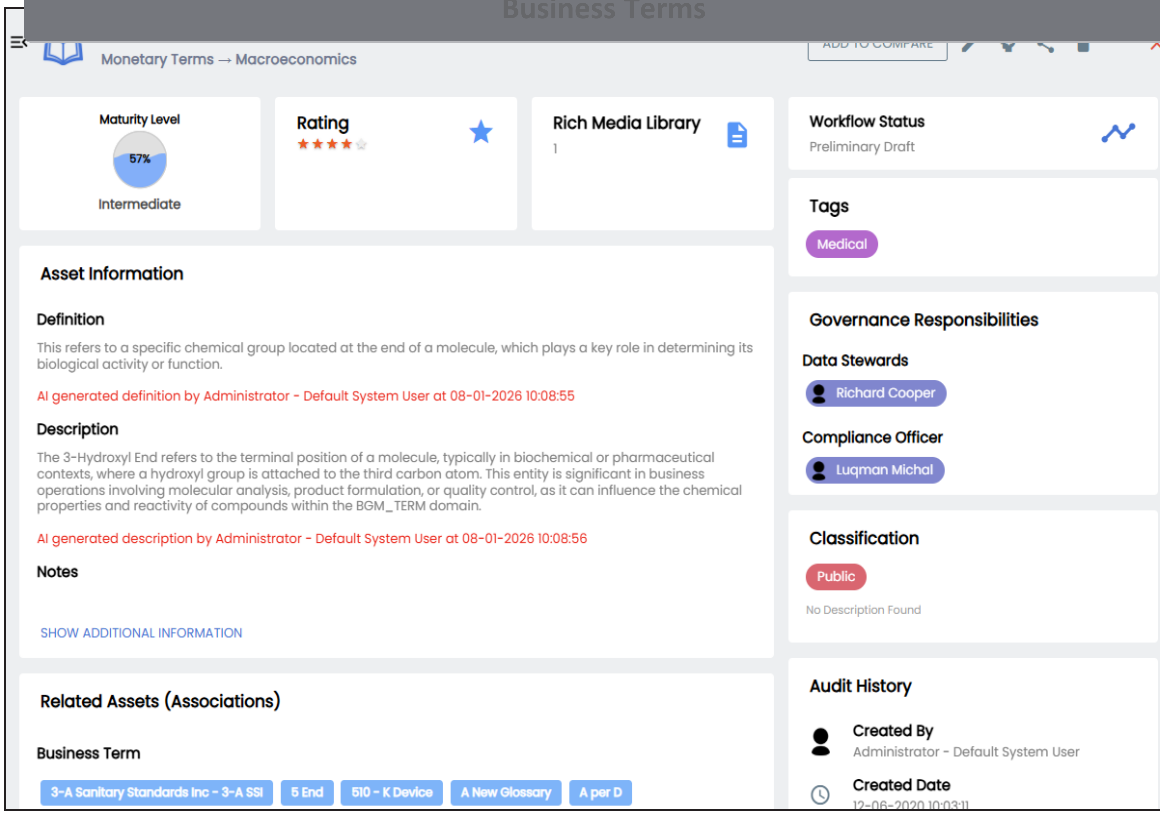
Viewing Business Term

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, data value score, maturity level, 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.



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

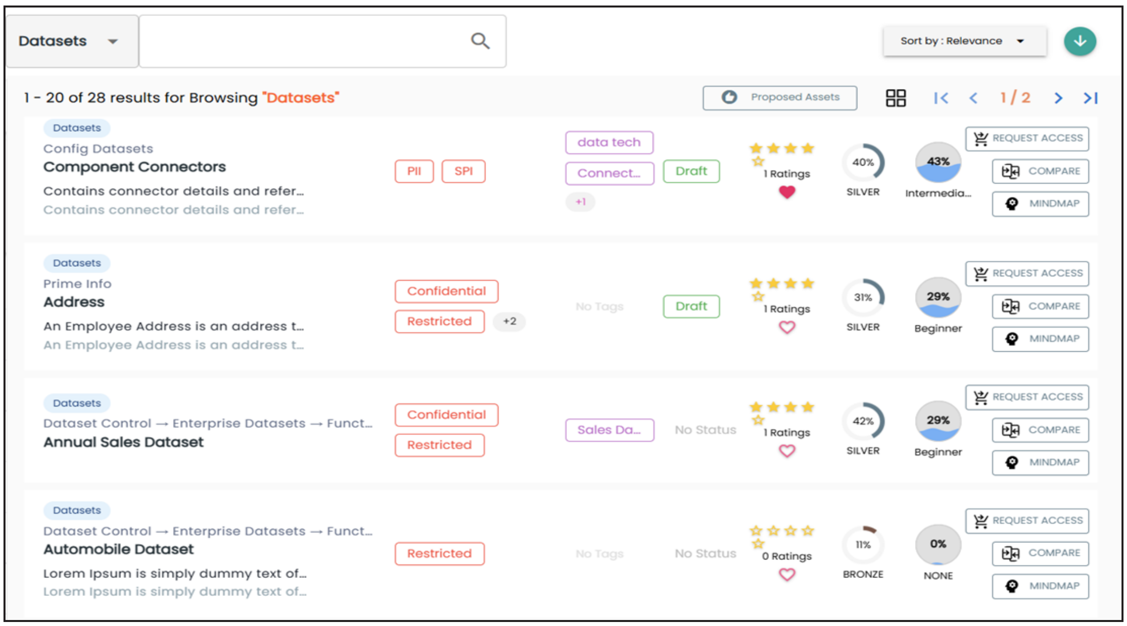
Datasets

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 data-set, all in one place.

To view the datasets, follow these steps:

1. On the Discover Assets dashboard, click the **Datasets** card,then click **Browse Datasets.** A list of datasets appears.

   For example, in the following image, a list of 28 datasets appears.



2. 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]()

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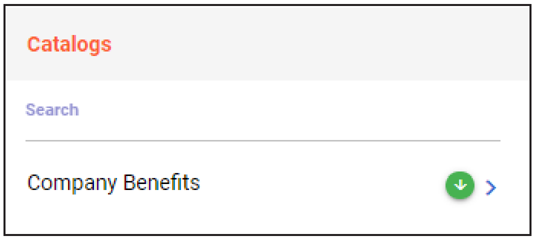
You can also download marketplace assets in the XLSX format. To download the marketplace assets, follow these steps:

1. In the filters pane, click **Explore By Category**, the Explore Datasets by pane appears.
2. Hover over a marketplace asset. The download button appears.

3. Click .
   The selected asset is downloaded in the XLSX format.

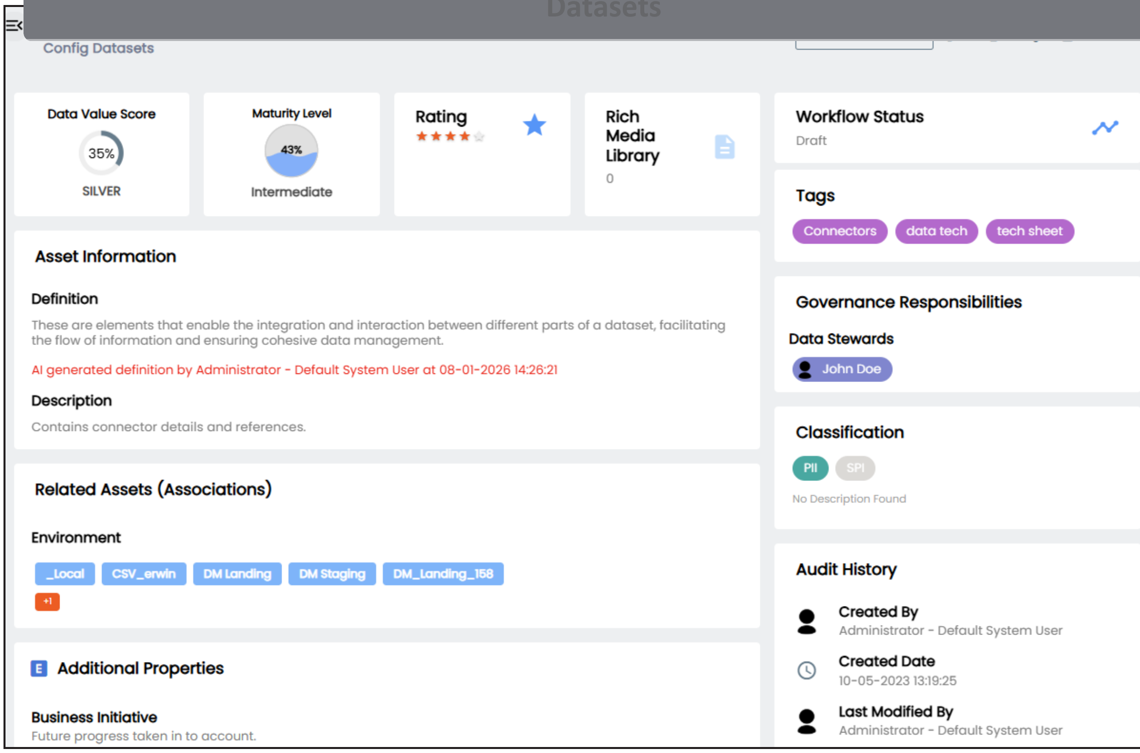
Viewing Datasets

The dataset details include asset details, data value score, maturity level, 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.



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

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:

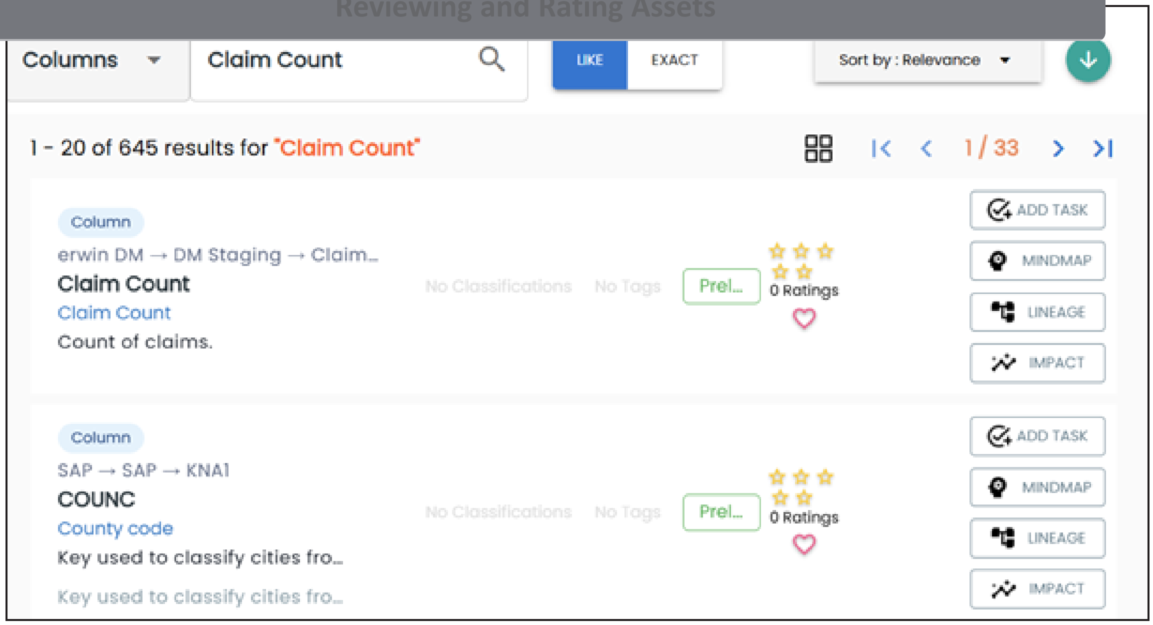
1. On the **Discover Assets** dashboard, click the required **<Asset_Type>** card, then click **Browse <Asset_Type>.** A list of assets appears.

   For example, in the following image, a list of 20906 columns appears when you click the **Columns** card and then click **Browse Columns** on the Discover Assets dashboard.

2. Use the search box to find the required asset from the list.

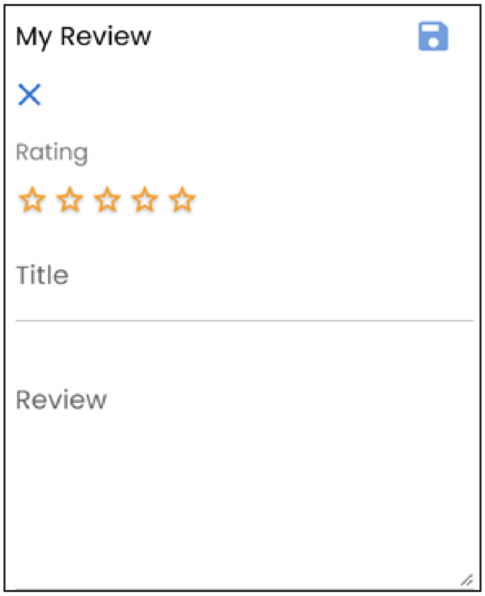
   For example, in the following image, a list appears after entering Claim Count as the search string.



3. Click ratings for the required asset.

   The Ratings and Reviews page appears.

The My Review page appears.

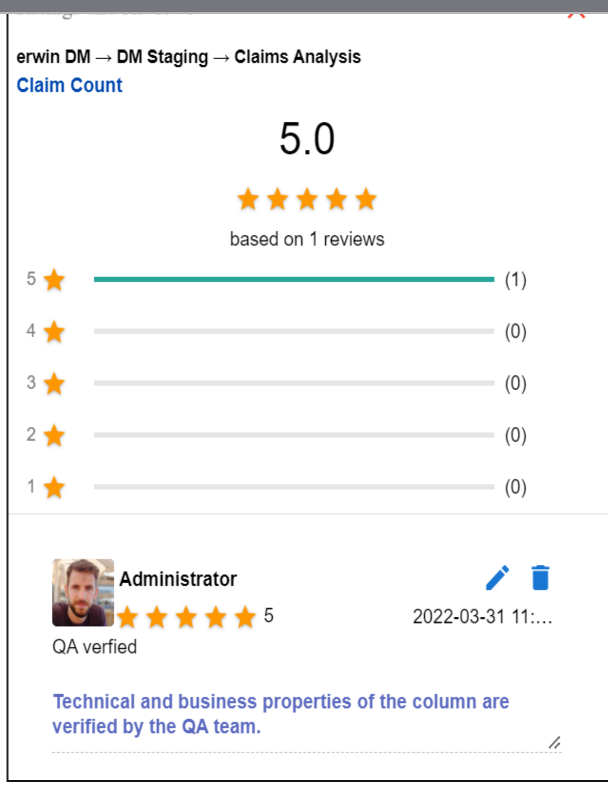


5. Enter appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Rating	Specifies the rating of the asset on a scale of one to five stars
Title	Specifies the title of the review
Review	Specifies the review content

6. 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.

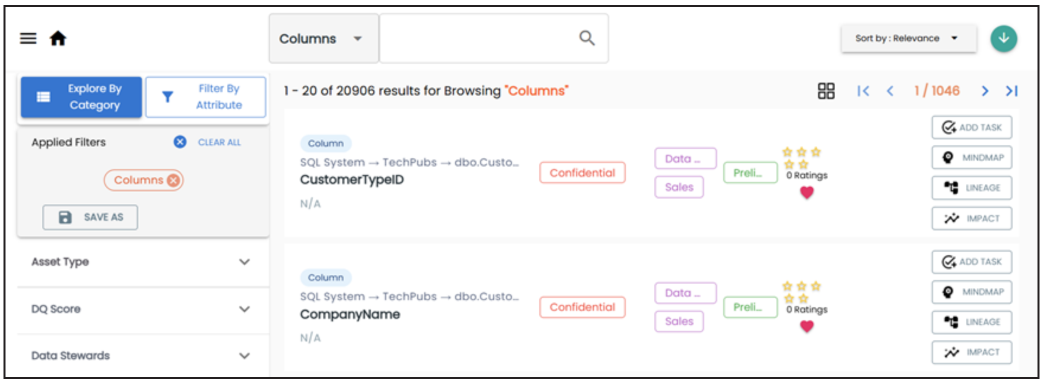
Adding Tasks

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:

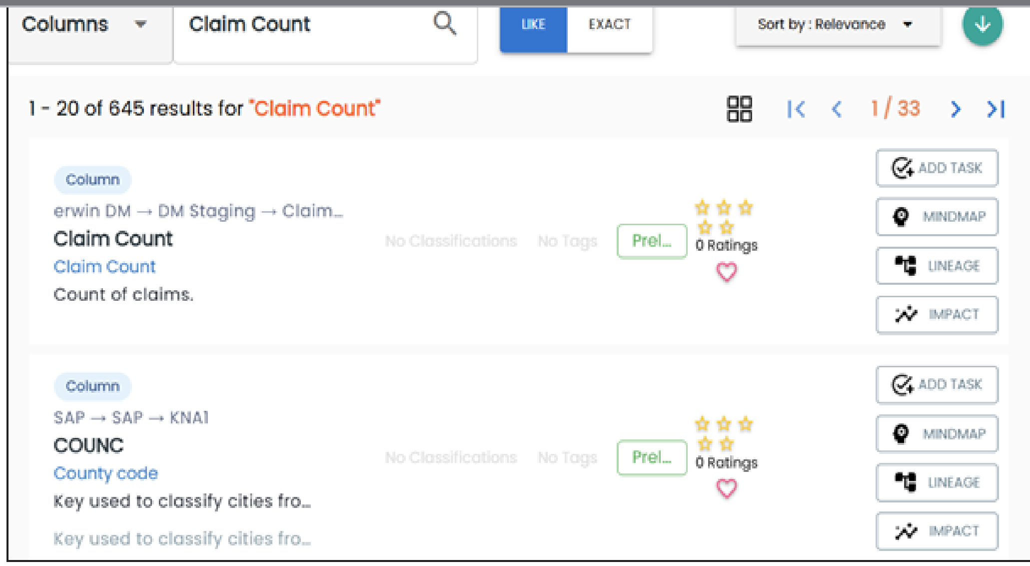
1. On the **Discover Assets** dashboard, click the required **<Asset_Type>** card and then click **Browse <Asset_Type>** . A list of assets appears.

   For example, in the following image, a list of 20906 columns appears when you click the **Columns** card and then click **Browse Columns** on the Discover Assets dashboard.



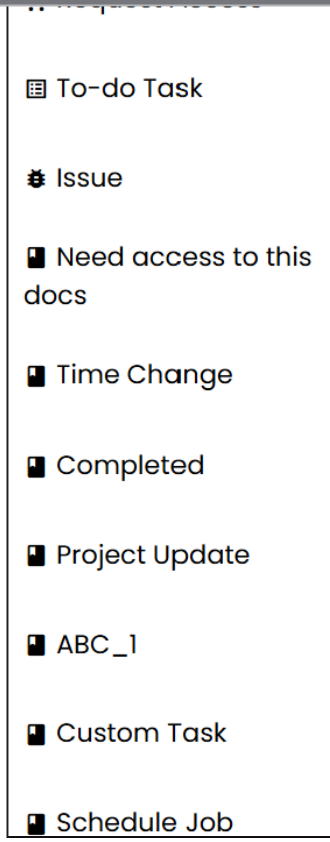
2. Use the search box to find the required asset.

   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.



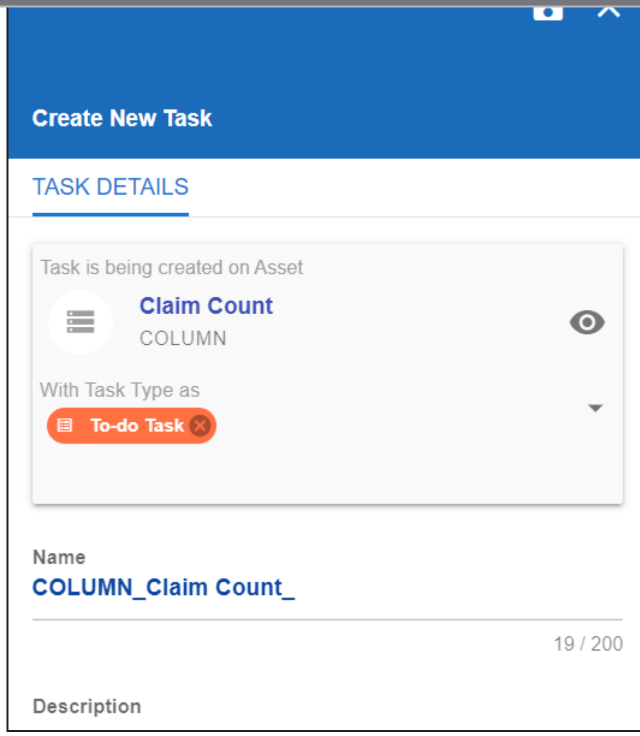
3. Click **Add Task**.

   A list of task types appears.



4. Click the required task type.

   The Create New Task page appears.



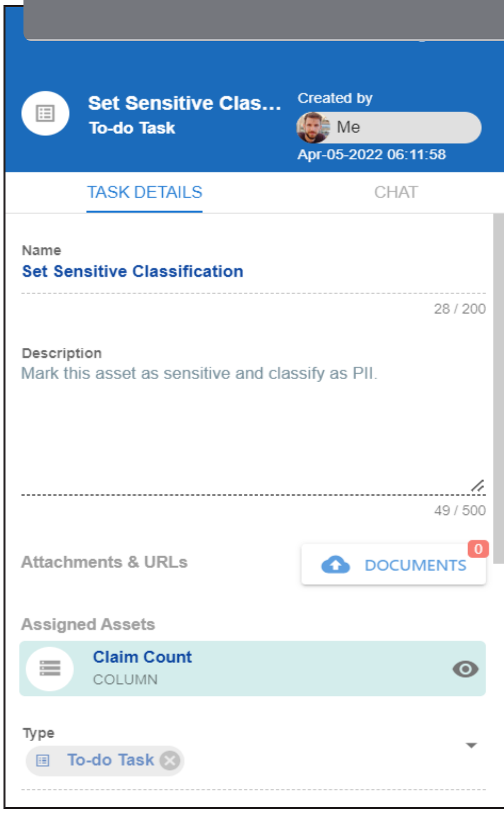
5. Enter appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Task is being created on Asset	Specifies the asset for which the task is 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.

Field Name	Description
	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

6. 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.



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:

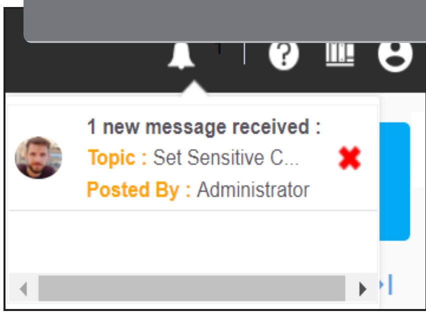
Assigned

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.


1 new message received :
Topic : Set Sensitive C...
Posted By : Administrator

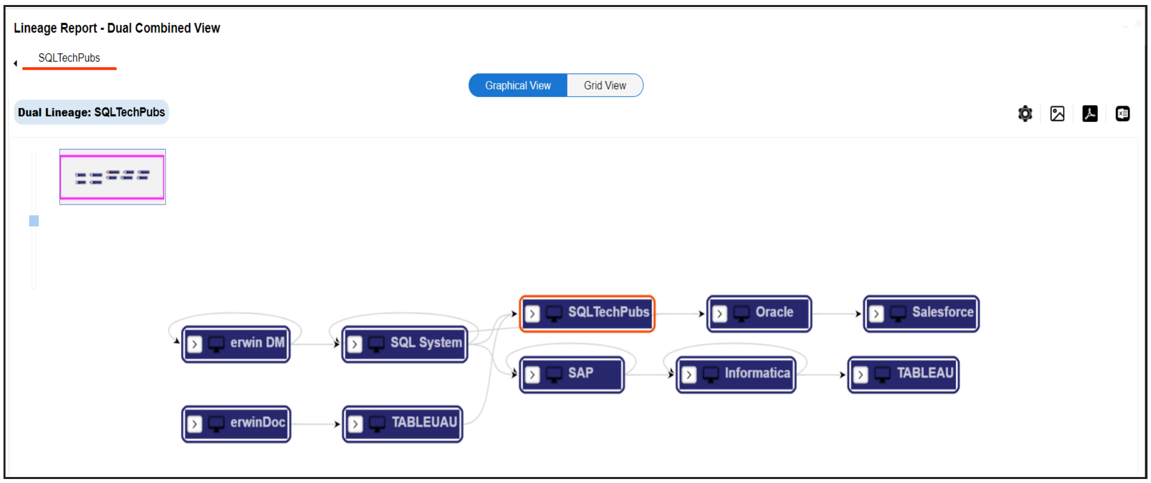
Viewing Lineage

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

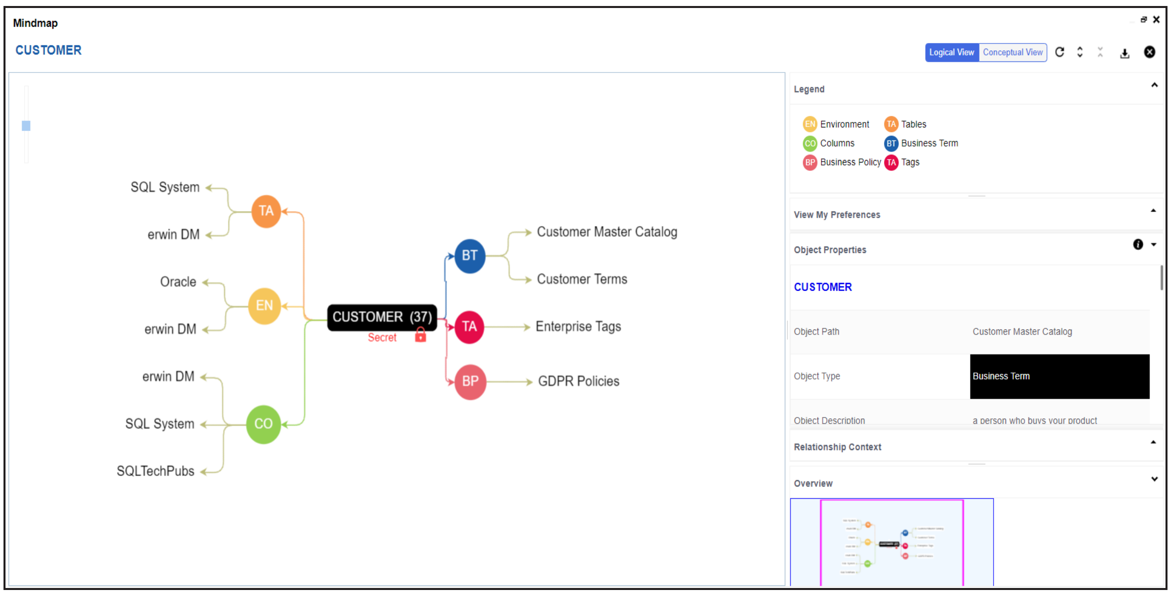
Viewing Mind Maps

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.

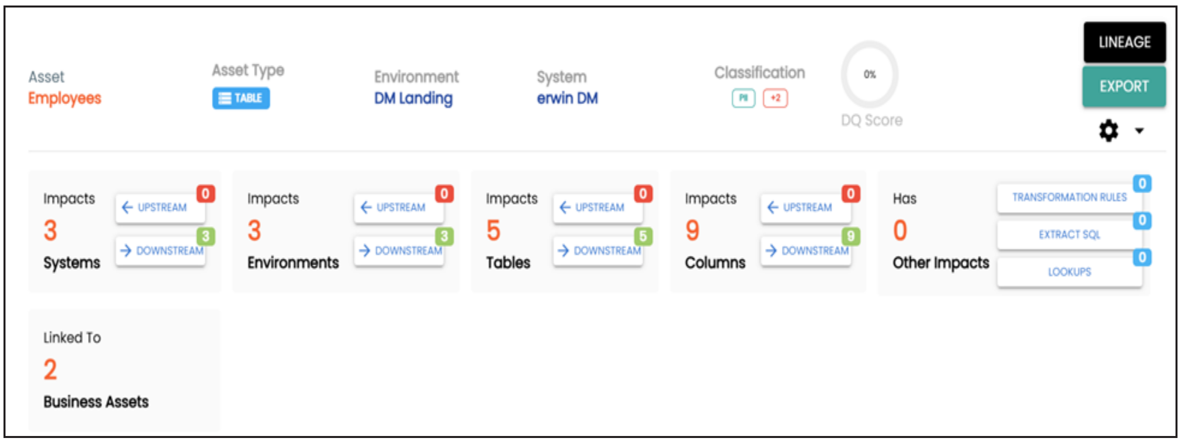
Viewing Impact

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:

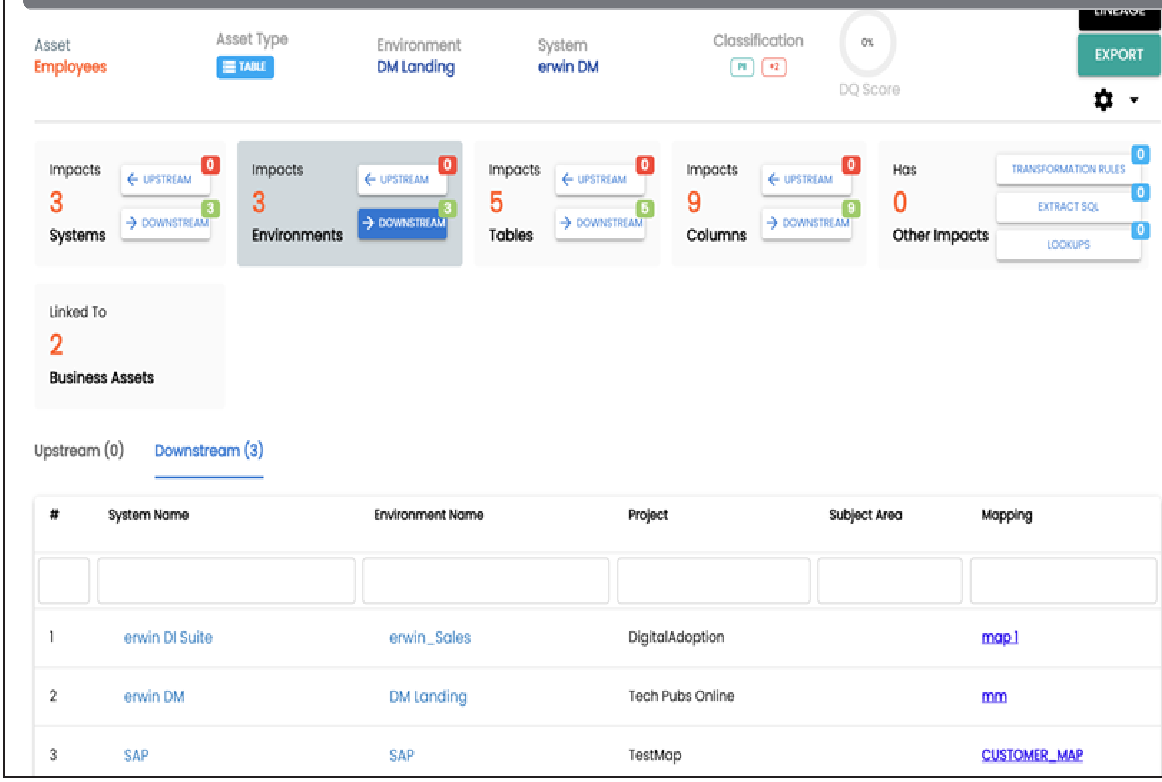
- Indirect impact (upstream and downstream)
- Other impacts (business rules, source extract SQL, and lookups)

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

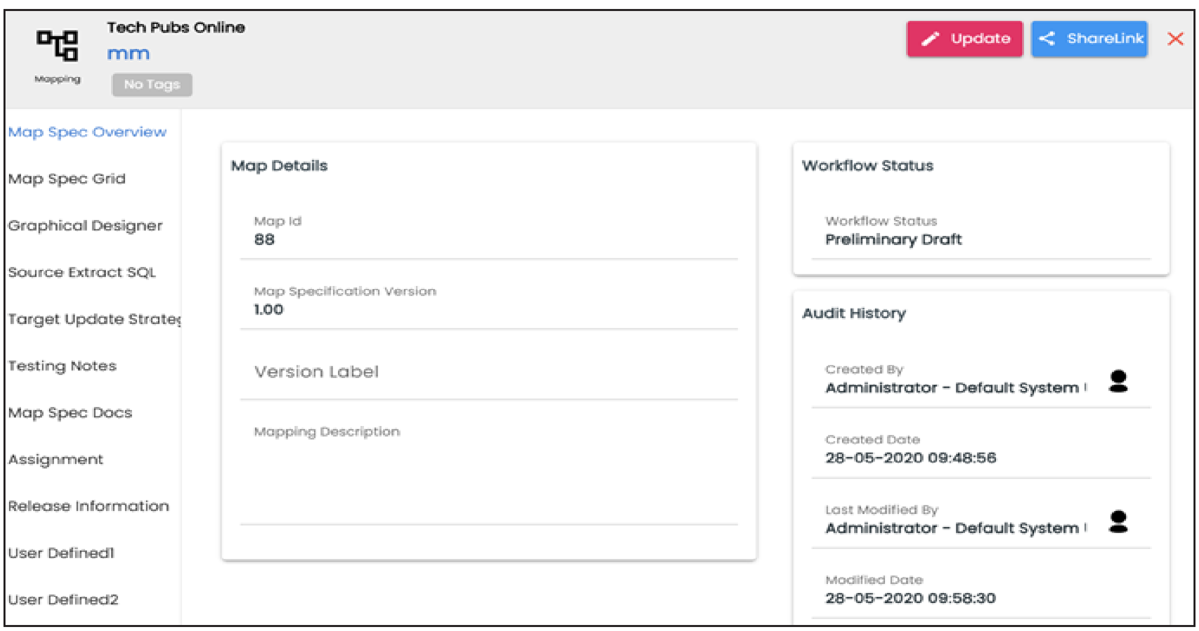
The asset impact page appears.



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



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



F[illegible]ct Analysis topic.

Viewing Compliance Reports

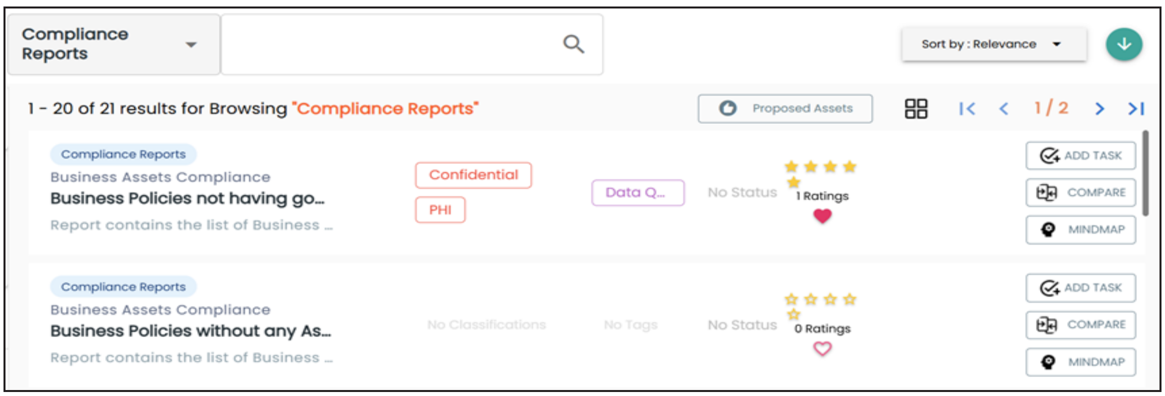
You can view and browse through the compliance reports available in your ecosystem using the Discover Assets module. Once the reports are generated, you can also download the compliance reports in .XLSX format.

> 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, click the **Compliance Reports** card and then click **Browse Compliance Reports**. A list of compliance reports appears.

For example, in the following image, a list of 21 compliance reports appears.



You can use the search box to find the required report from the list. 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:

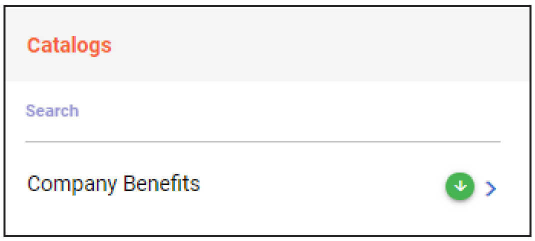
- View report details
- Download reports
- Add tasks

In
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.

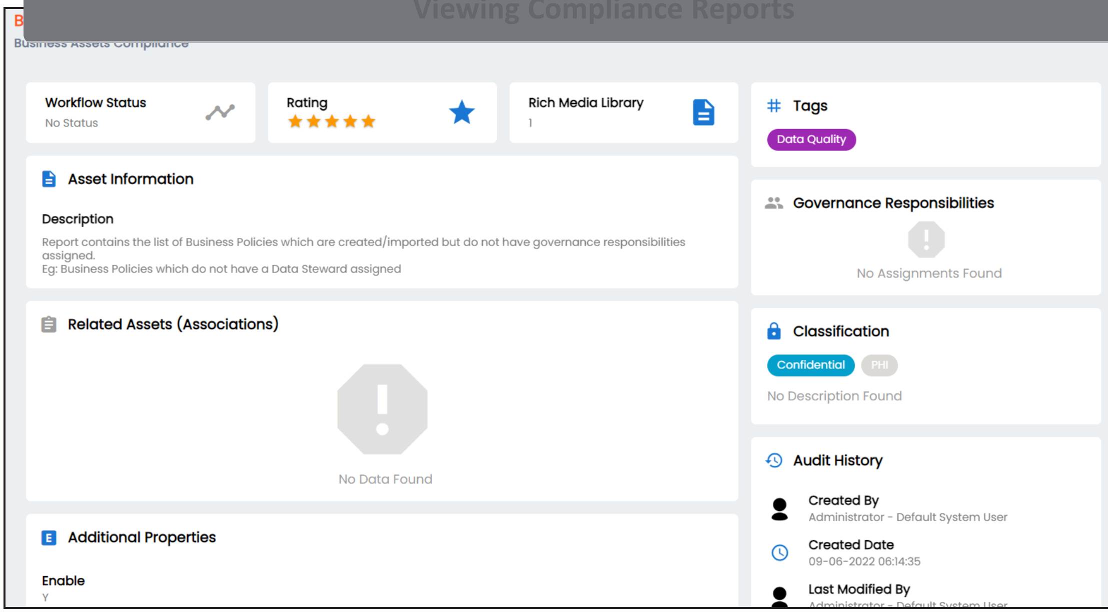
Viewing Report Details

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.



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.

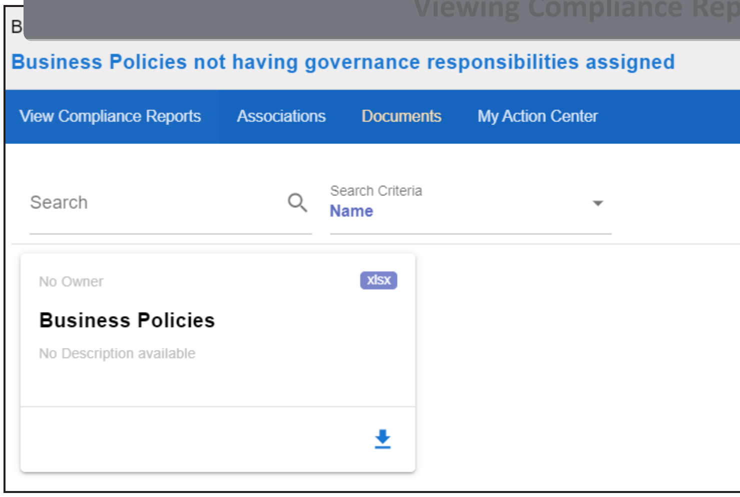
For more information on editing compliance reports, refer to the Managing Compliance Reports topic.

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 Policies not having governance responsibilities assigned
View Compliance Reports
Associations
Documents
My Action Center
Search
Search Criteria
Name
No Owner
xlsx
Business Policies
No Description available

Comparing Assets

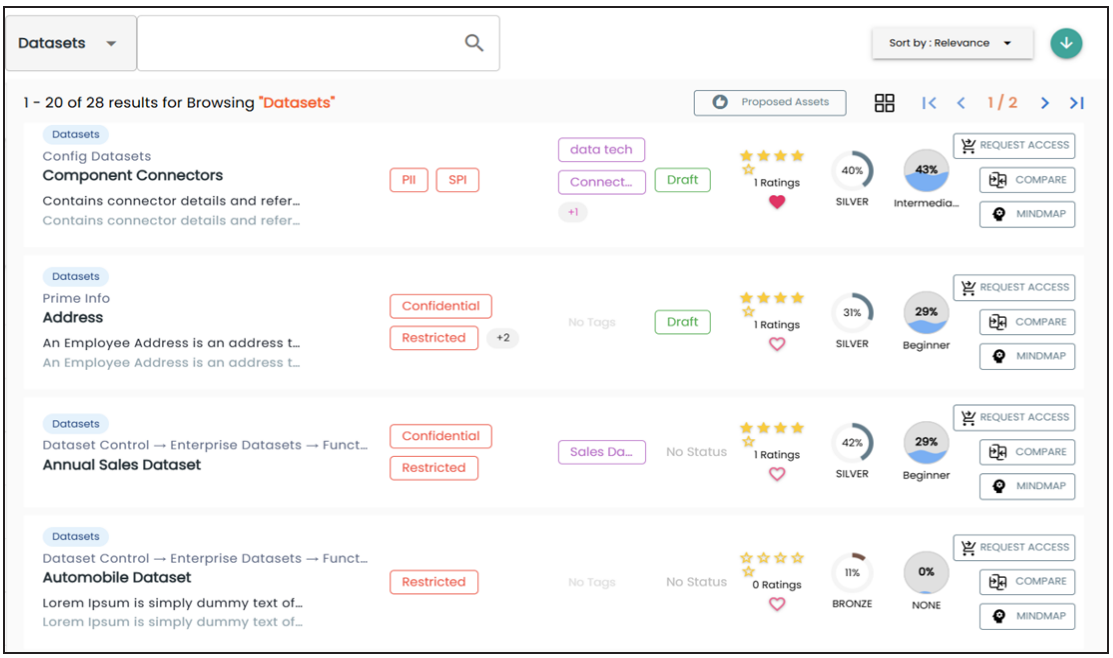
You can compare business and marketplace assets side by side to gain more insight and see asset property differences using Discover Assets. You can compare them based on similarity or distinct properties and more.

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:

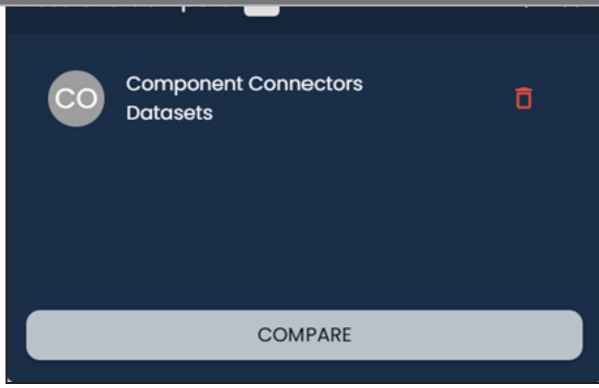
1. On the Discover Assets dashboard, click the **Datasets** card, then click **Browse Datasets**. A list of datasets appears.

   For example, in the following image, a list of 28 datasets appears.

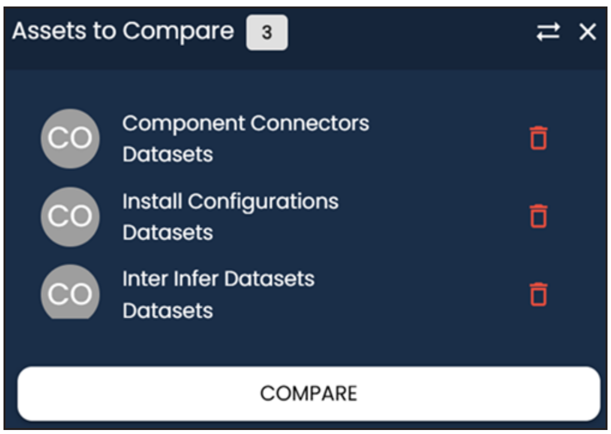
2. Select a dataset that you want to compare, then click COMPARE.
   The Asset to Compare pane appears.

   You can select up to five assets for comparison.



Alternatively, you can also compare assets in the Card View ( )
.

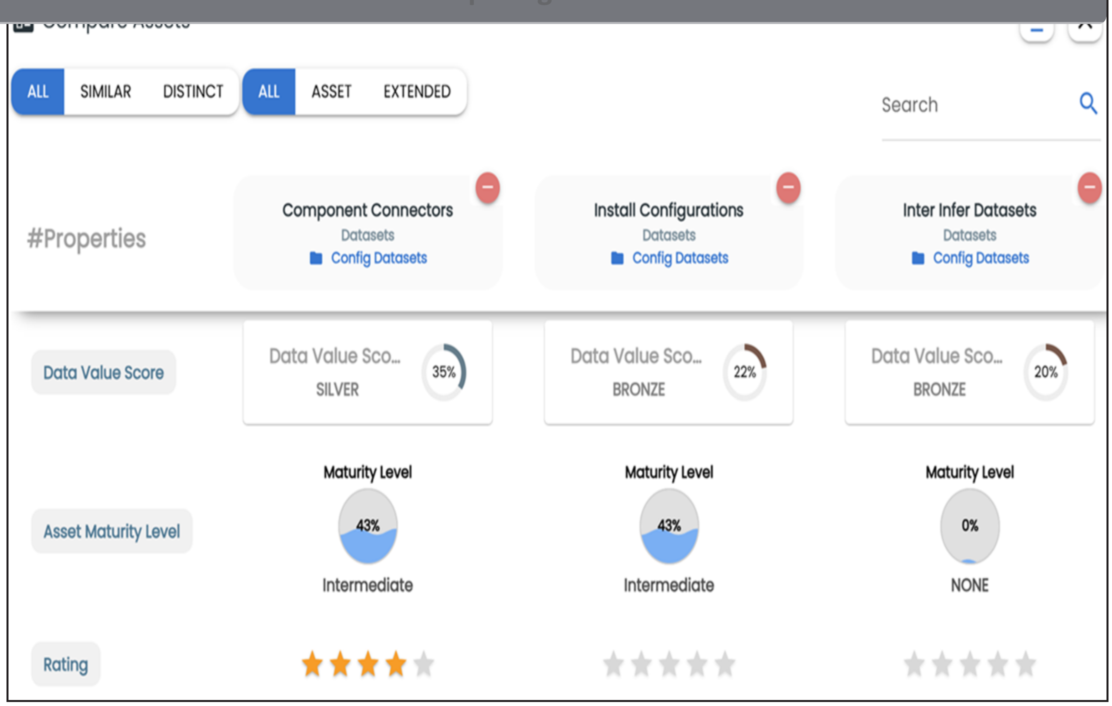
3. Choose other required assets you wish to compare, then click COMPARE. Selected assets are added to the Asset to Compare window.



You can click to remove assets from the compare list and to move the window.

4. Click **Compare**.

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



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

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

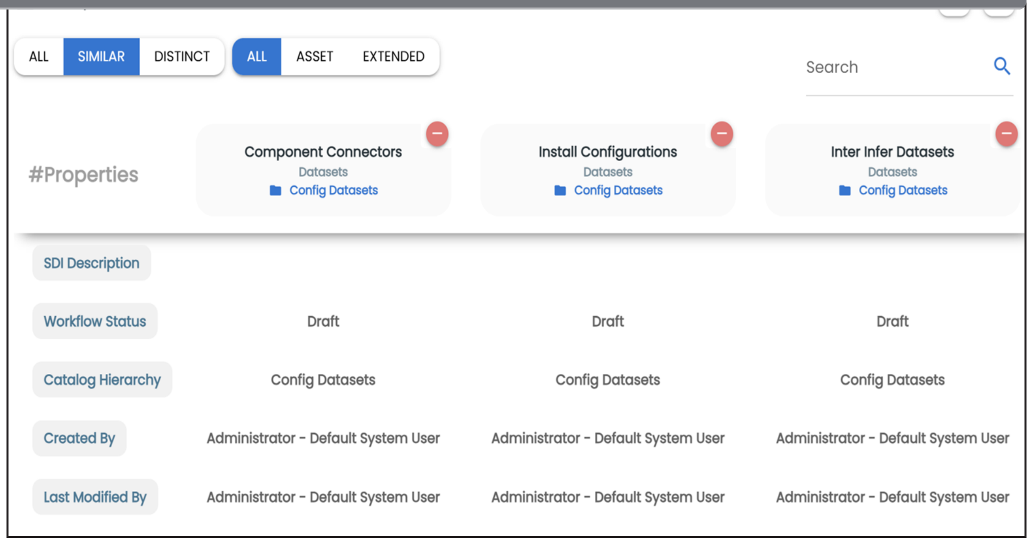
Use the following options to compare assets based on similar or distinct properties:

All

Use this option to view all asset properties for comparison.

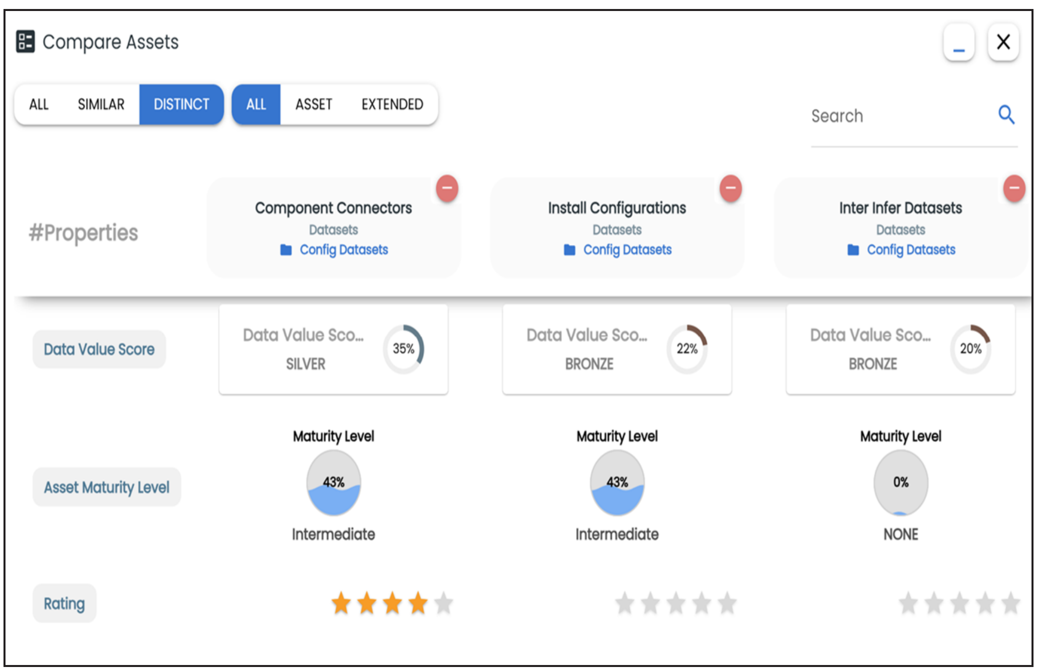
Similar

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.



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.

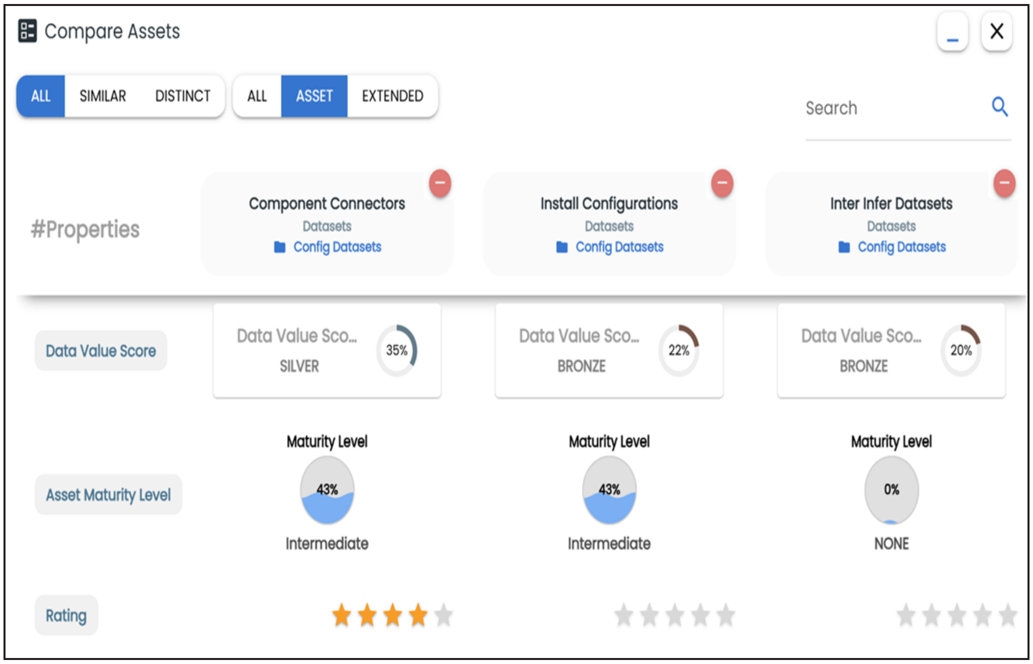


Use the following options to compare assets based on similar or distinct properties:

Use this option to view all asset properties for comparison.

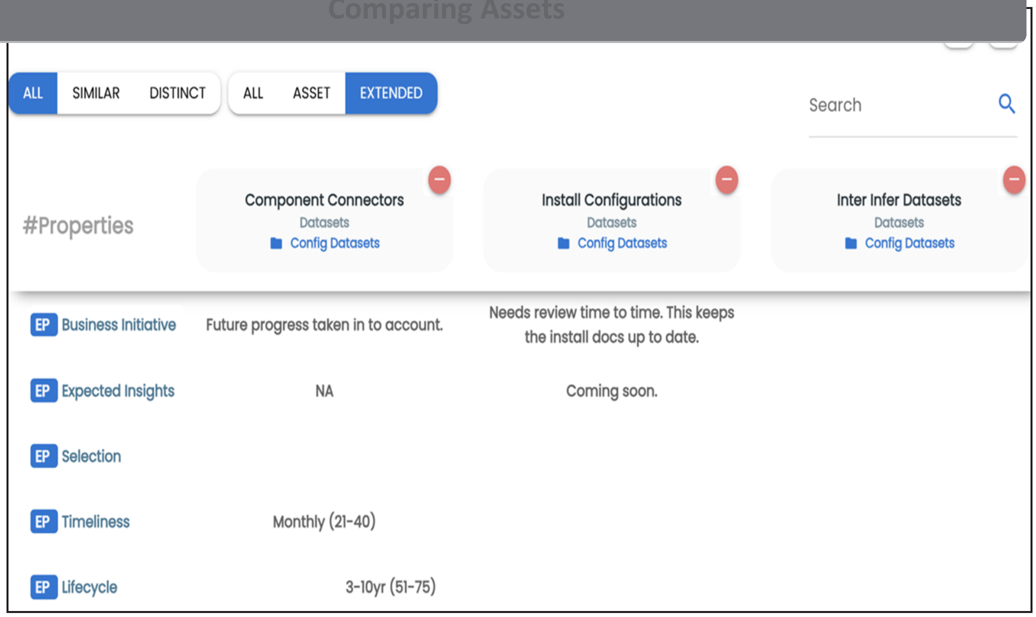
Asset

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



Extended

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


ALL
SIMILAR
DISTINCT
ALL
ASSET
EXTENDED
Search
#Properties
Component Connectors
Datasets
Config Datasets
Install Configurations
Datasets
Config Datasets
Inter Infer Datasets
Datasets
Config Datasets
EP Business Initiative
Future progress taken in to account.
Needs review time to time. This keeps the install docs up to date.
EP Expected Insights
NA
Coming soon.
EP Selection
EP Timeliness
Monthly (21-40)
EP Lifecycle
3-10yr (51-75)

Proposing Assets

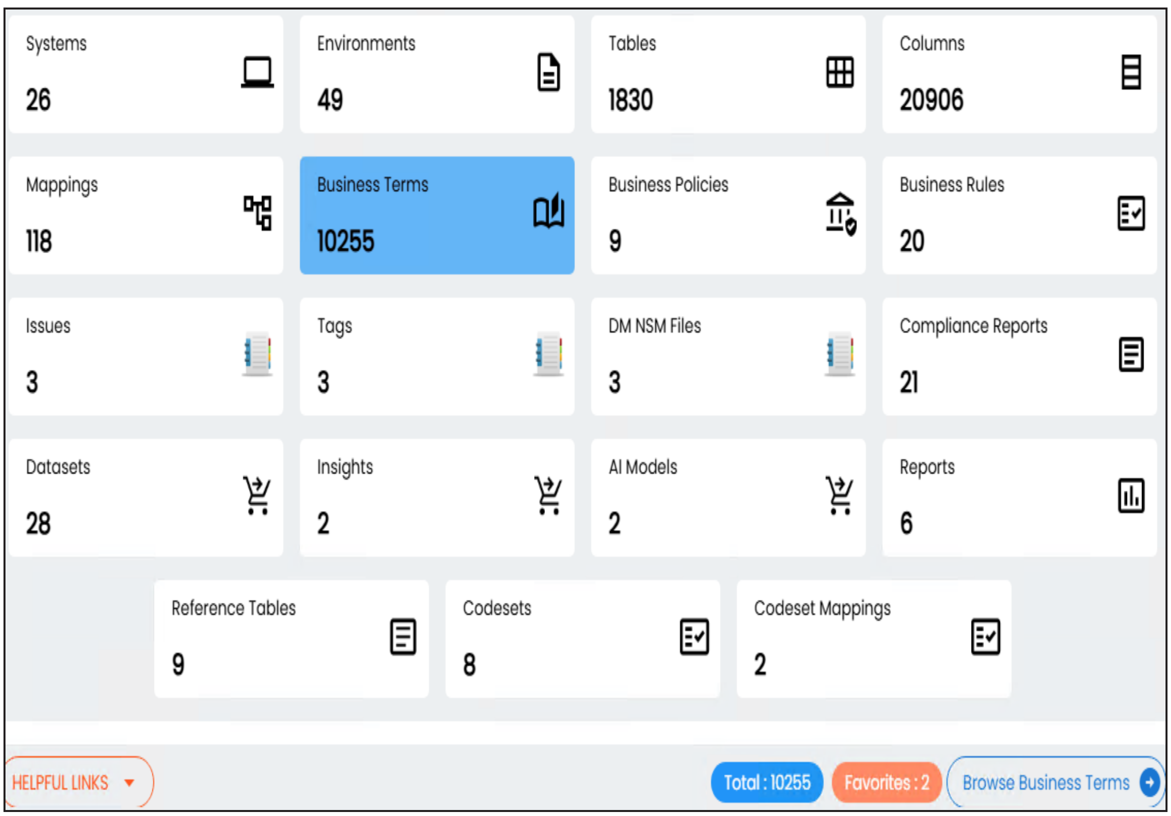
Based on your analysis and requirements, you can propose new business and marketplace assets and view the proposed assets from other users.

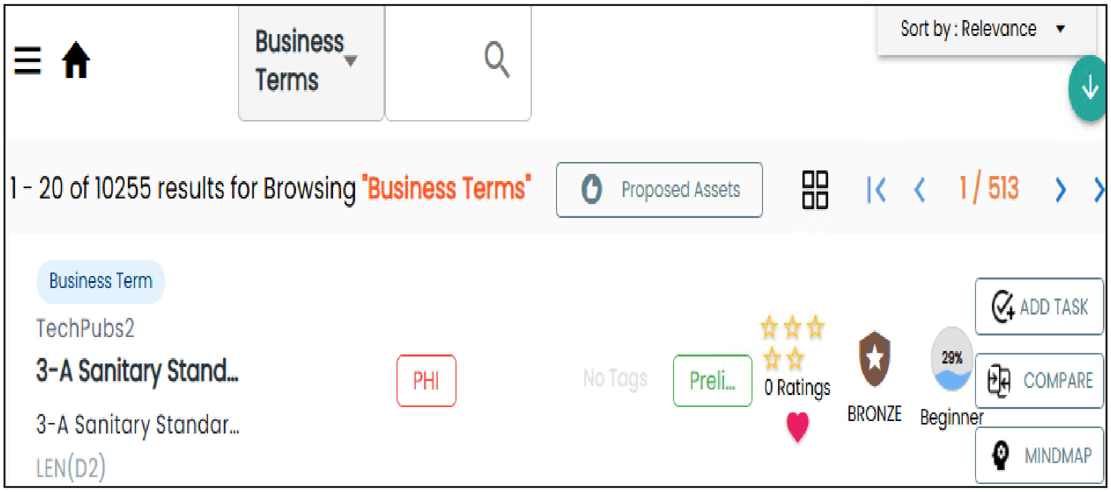
This topic walks you through the process of proposing business terms. Similarly, you can propose other business and marketplace assets using the Discover Assets module.

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

To propose business terms, follow these steps:

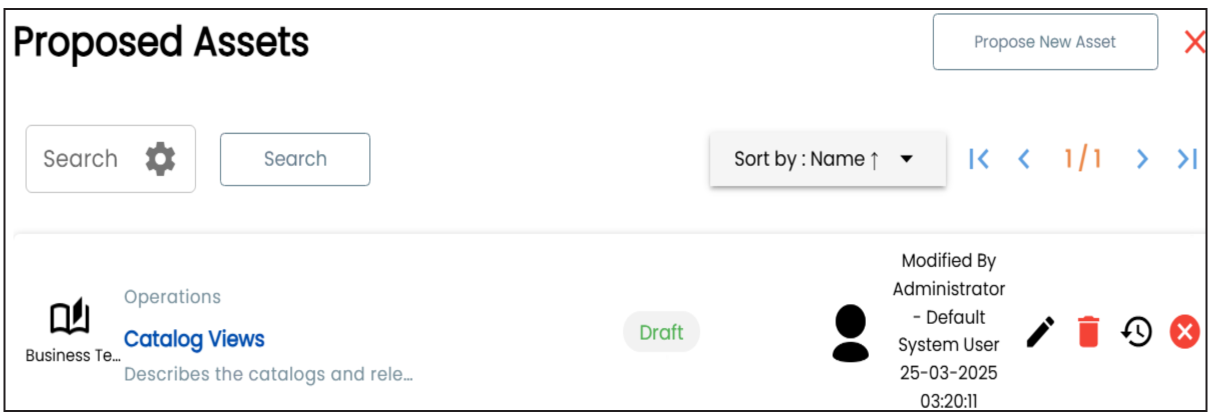
1. On the Discover Assets dashboard, click the **Business Terms** card, and then click **Browse Business Terms**.





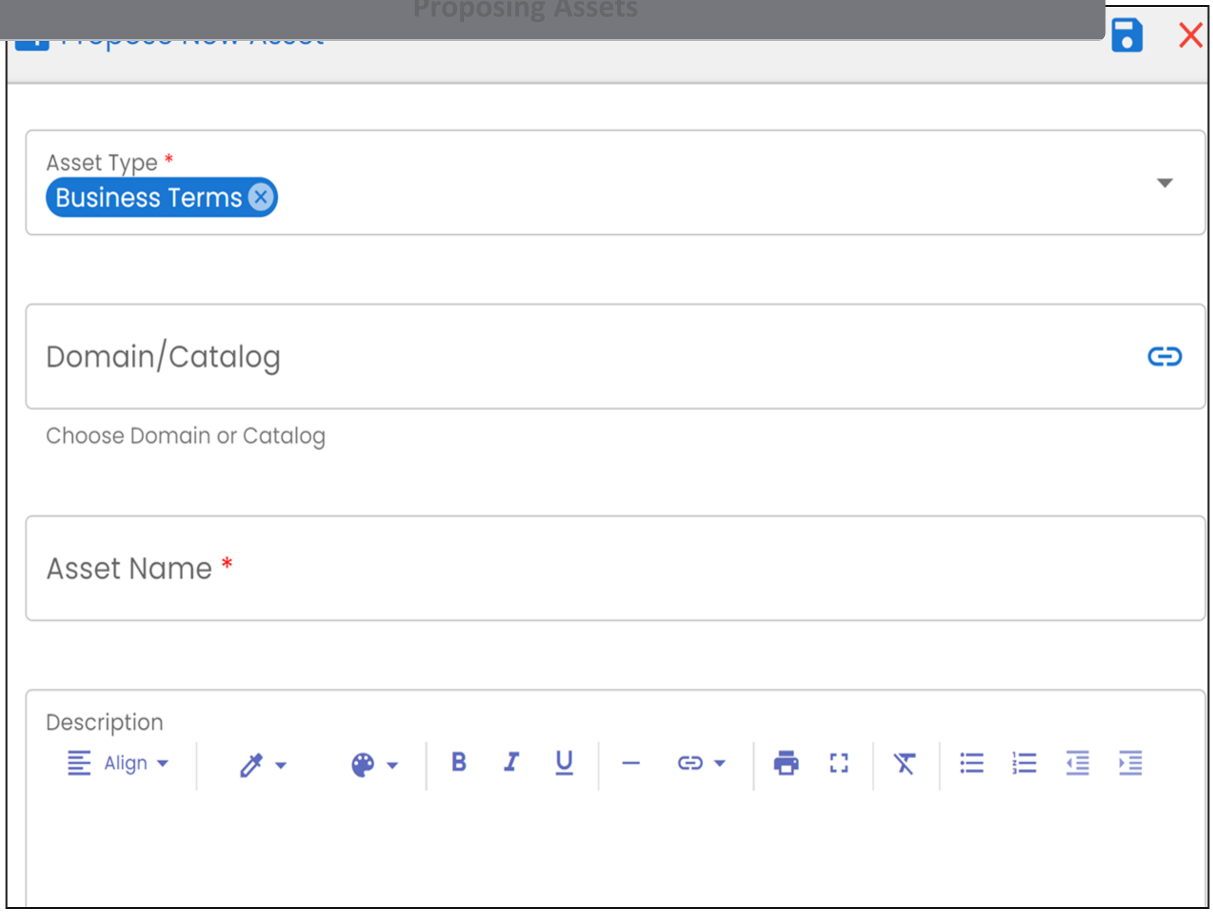
2. Click **Proposed Assets**.

   The Proposed Assets page appears. A list of assets proposed by your team is available here.



3. Click **Propose New Asset**.

   The Propose New Asset page appears.

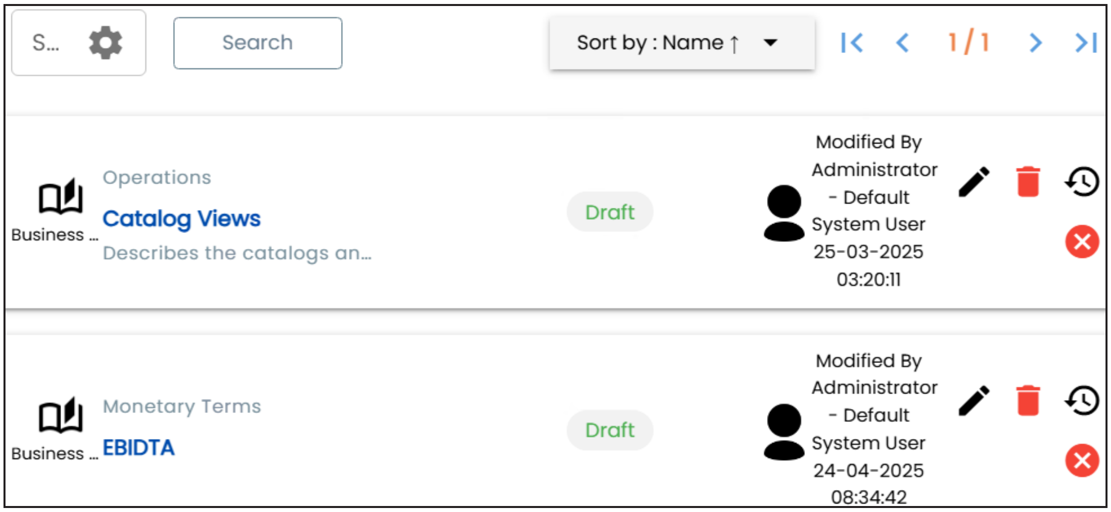


Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field	Description
Asset Type	Specifies the type of asset
Domain/Catalog	Specifies the domain or catalog under which the asset should be added. You can either create a new domain or catalog or click to select an existing catalog.
Asset Name	Specifies the name of the asset
Description	Specifies the description of the asset type

4. Click to save and exit.

A new asset is proposed and the status is set to Draft.



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 ( )

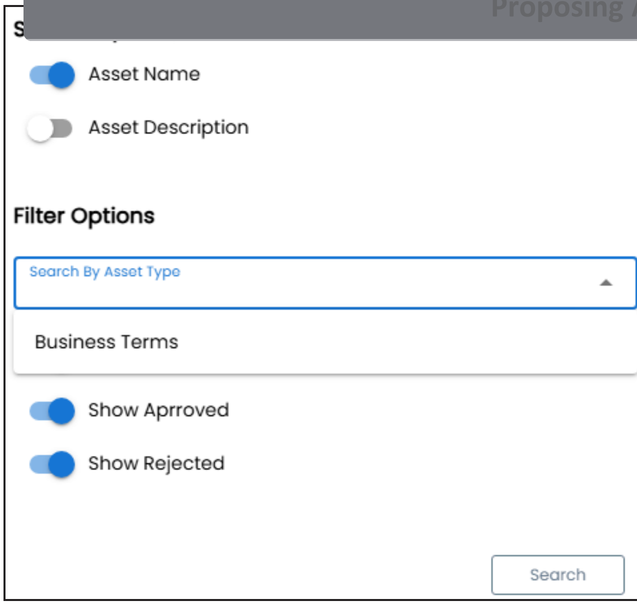
Use this option to view all the actions performed on the proposed asset.

Reject ( )

Use this option to reject the proposed asset. You can review and resubmit the asset.

Also, use the Search box to search and filter business assets. To refine search results, you can configure your search and filter using search and filter options.

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



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

Options	Description
Asset Name	Switch this option on to search business assets based on asset name.
Asset Description	Switch this option on to search business assets based on asset description.
Search By Asset Type	Switch this option on to filter assets based on asset type. For example, Business Terms.
Show Drafts	Switch this option on to filter and display assets saved as draft.
Show Approved	Switch this option on to filter and display only approved assets.
Show Rejected	Switch this option on to filter and display only rejected assets.

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.