Information Governance Catalog (IGC) Viewer Training

Center for Data, Analytics and Reporting (CeDAR)
The Three Pillars of Information Governance

1. Policies and Rules Enable Precise Communication of Governance Requirements

2. Support for Information Accountability & Responsibility

3. A Common Information Vocabulary

Center for Data, Analytics and Reporting (CeDAR)
1) POLICIES AND RULES ENABLE PRECISE COMMUNICATION OF GOVERNANCE REQUIREMENTS

• Governance policies communicate the University’s governance requirements.
• Governance rules implement policies by communicating and enforcing data quality requirements.
2) SUPPORT FOR INFORMATION ACCOUNTABILITY & RESPONSIBILITY

• Stewards of information can be assigned to terms and information assets to provide a single point of contact.

3) IGC DOCUMENTATION

• This documentation is to support the CeDAR IGC Viewer Training Class.
4) A COMMON INFORMATION VOCABULARY

1) Terms describe specific information assets, i.e. Course ID, Primary Ethnicity, Work Order, etc.
2) Information assets (attributes) can be linked to the terms that describe them, i.e. Princeton Data Security classification.
3) Terms are classified within an hierarchical structure of categories, i.e. Student Records, Human Resources, Maximo 7.5.
What is the Information Governance Catalog (IGC)

• The InfoSphere Information Governance Catalog (IGC) is a web-based tool from IBM that allows you to explore, understand and analyze information.

• IGC can document and enact policies and rules.

• The IGC enables data stewards to share collected metadata with University consumers. These consumers have access to the best assets for their purpose, while still adhering to enterprise governance requirements.

• Data stewards can create, manage and share a common business language.

• Data lineage can be tracked and available to University consumers.
Princeton and the IGC

• CeDAR acquired IBM’s premier metadata management tool, “Information Governance Catalog” or “IGC” to help all University consumers better understand their data.

• The data items available in the Information Warehouse are defined as “Business Terms” within the IGC. Most business terms represent data found in Princeton’s Information Warehouse.

• The IGC catalog organizes data definitions and presents Business Terms by their owning department, or in which Cognos package or packages the data items are found.
Metadata and the IGC

• Technical metadata including database table names and any logic required to create the data item within the Information Warehouse can also be provided.

• Important metadata can be documented including:

1. The data item source
2. The data item location within an Information Warehouse package or multiple packages
3. Security restrictions
4. The office which owns the data item.
Princeton and the IGC - Today

This tool is used to give the University community access to terms and definitions so that everyone can better understand the University’s metadata.

Data stewards are responsible for managing their respective categories, terms and definitions. Business Terms are still being defined.

To date Data Stewards worked with CeDAR to:

- Define a Category hierarchy structure
- Test user permissions and capabilities
- Begin loading terms and definitions

We have defined ~640 terms within 10 Parent Categories and 29 Sub-Categories.
Why is the IGC Important

A business term can be defined in several ways depending upon what group is using the term. The IGC helps us distinguish between different term definitions.

An example of a business term that is defined multiple ways in the IGC.

**Term: Account**
From a Human Resources perspective an **Account** is defined as a **person** or entity, i.e. DCU, Departmental Computer User.

**Term: Account**
From a Financial perspective an **Account** is found in a ledger. It is not a **person**.
Let’s Get Started!
Login to IGC via IE:
https://aisiw208l.princeton.edu:9445/ibm/iis/igc/

The IBM Infosphere certificate has not been installed so you will see the below message. IGC is located behind the Princeton firewall, and is secure. Click on the More information link.

This site is not secure

This might mean that someone’s trying to fool you or steal any info you send to the server. You should close this site immediately.

Close this tab
More information
The webpage link will appear. Click on the link: **Go on to the webpage**

This site is not secure

This might mean that someone’s trying to fool you or steal any info you send to the server. You should close this site immediately.

- Close this tab
- More information

*Your PC doesn’t trust this website’s security certificate.*

Error Code: DLG_FLAGS_INVALID_CA

Go on to the webpage (not recommended)
You will be taken to the IGC login page.

Log in as you would to your PC. Enter your netid and password. Select Login.
The IGC Welcome Page

On this page there are tabs to access features including:

1) Search
2) Glossary
3) Information Assets
4) Labels
5) Queries
6) Collections
The Search Feature

The **Search** box appears on the Welcome page.

1) You may do a simple search for **Terms**.
2) If you click on the **Options** button you can do a more advanced search.
Simple Search

Let's do a simple search for terms that include “name”.

1) Type “name” in the search field and select the **Search** button.
Search Results

The Search Results page opens and returns 33 terms that include “name” in the term.
Term Details Dialog Box

If you hover over a term the Details dialog box opens. This is a quick way to see the short and long description, category path to the term from its parent category or categories, and status.

Note: When workflow is turned off the default status is Accepted.
Term Details Page

If you click on a term the Term Details page opens. This page provides additional term information including:

1) Princeton Data Security Level
2) History

Other details include:

1) Associated Terms
2) Assigned Assets
3) Blueprint Elements
4) In Collections
Princeton Data Security Level

The Princeton Data Security Level can be found under General Information on the Term Details page.

The Information Security Policy and explanation of classification levels can be found at:
https://www.princeton.edu/oit/it-policies/it-security-policy/

Classification levels include:

1) Restricted
2) Confidential
3) Unrestricted Within Princeton
4) Publicly Available
Classification Level Definitions

1) Restricted information includes:

- Social security number
- Bank account number
- Driver’s license number
- State identity card number
- Credit card number
- Protected health information (defined by HIPAA)
Classification Level Definitions

2) **Confidential information** falls outside the **Restricted** classification, but is not intended to be shared freely within or outside the University due to its sensitive nature and/or contractual or legal obligations. Examples include:

- all non-Restricted information contained in personnel files
- misconduct and law enforcement investigation records
- internal financial data
- donor records
- education records (as defined by FERPA)
Classification Level Definitions

3) **Unrestricted Within Princeton** information falls outside the Restricted and Confidential classifications, but is not intended to be freely shared outside the University.

- One example is the Faculty Facebook.

4) **Publicly Available** information is intended to be made available to anyone inside and outside of Princeton University.
History Details include:

1) **Date**: initial date the term was created.
2) **Comment**: identifies if the term was created manually or by using the import feature.
3) **Edited By**: who touched the term definition.

Other History details include:

1) Created By
2) Created On
3) Modified On
4) Modified By
Navigating to the Category Hierarchy Structure

1) Select the **Glossary** pull-down menu.
2) Select the **Category Hierarchy** link.
Viewing Categories

The Categories window opens and you will see the Categories that you have permission to view.
Category Details

If you select a Category or sub-Category the Category Details window opens to show you all the Terms contained within.
Query Viewing,
Building
and Exporting
Why Use Queries?

• Queries enable you to export your business terms to Excel or a .CSV file.

• In a spreadsheet environment you can easily work with these terms.

• As the IGC becomes a more robust metadata repository it will offer a common platform for learning and sharing metadata.
1) At the Welcome page select **Queries** in the blue toolbar.
1) The **Manage Queries** page opens.
2) You will be able to view those queries you have created.
3) You can also view those queries which have been published querying metadata that you have permission to view.
4) Unpublished queries can only viewed by the query creator.
1) Below the query name is a description of the query.
2) The description includes the terms that are being queried.
3) It also includes the last modified date of the query.
4) Looking at the Term Query we see that it includes: 7 types of asset information like Name, Short Description, Parent Category, and Collections location & visibility information.
1) To run the query click on the query name.
1) The **Query Results** window opens.
2) For this example we’re viewing two HRES (Housing Real-Estate Services) terms.

![Query Results: Term Query](image)

4) If you hover over the **Asset name** the term details window opens giving you the **Short** and **Long Descriptions**, **Parent Category** and **Status**.
1) The **List Options** menu is located on the right hand side of the **Query Results** window.

2) You may:
   
   a) View 10, 50 or 100 items per page  
   b) Sort by Name, Ascending or Descending  
   c) Save List to File: CSV or XLS format
1) For this demo select **Save List to File XLS**.

2) A window opens asking you to **Open** or **Save** the file.
3) We select **Open** to view the Excel spreadsheet.
1) You may save and work with the Excel spreadsheet.

<table>
<thead>
<tr>
<th>Asset Name</th>
<th>Name</th>
<th>Short Description</th>
<th>Long Description</th>
<th>Parent Category</th>
<th>Parent Category - Parent Category - Princeton Data Security Level</th>
<th>In Collections</th>
<th>In Collections Name</th>
<th>In Collections -</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Pets</td>
<td>Allow Pets</td>
<td>If pets are allowed in a room or apartment</td>
<td>Yes or No</td>
<td>HRES (Housing Real-Estate)</td>
<td>Unrestricted Within Princeton</td>
<td>HRES</td>
<td>HRES</td>
<td>True</td>
</tr>
<tr>
<td>Area</td>
<td>Area</td>
<td>Building Area</td>
<td>The area where the building is located such as apartment</td>
<td>HRES (Housing Real-Estate Services)</td>
<td>Unrestricted Within Princeton</td>
<td>HRES</td>
<td>HRES</td>
<td>True</td>
</tr>
</tbody>
</table>
Building a New Query in IGC

1) Select **Queries** in the blue toolbar.
1) The **Manage Queries** page opens.
2) Click the **New** button.
1) The **Untitled Query** window opens.

2) To build your query you will select your: **Asset Type, Available Properties** and specific **Criteria**, if there are any.
1) For this query we select the **Term** asset type.
1) In the **Available Properties** window double click on the properties you would like to add to the query.

2) Select the **Display** tab to the right, if it is not selected.

3) The properties will load in the **Displayed Properties** window on the right.

4) Select the **Run** button when ready to run the **Query**.
1) To save the query select the **Save** button in the **Untitled Query** window.
1) The **Save Query** window opens.
2) Name your query.
3) Add a description if you like.
4) Click **Save** when done.

**Note:** If you want your query to be available for others to use, you must select the **Publish Query** box in the **Save Query** window.
1) If you click on the **Queries** tab the **Manage Queries** window opens.  
2) When we scroll down we see the new **Term Query Sample** in the list.
We’ve built our first IGC Query!
Collections
Building and Viewing
What is a Collection?

- An IGC Collection is a group of assets.
- It may include Category and Term metadata.
- Each viewer may create a Collection(s) containing any and all metadata that user has permission to view.
Creating a New Collection – Choosing Categories and Terms

1) Before creating a Collection it is helpful to decide which categories and/or terms you want to include in your Collection.
2) Under the Glossary tab select Category Hierarchy from the pull-down menu to view the Categories and Terms you may include in your Collection.
Selecting Your Categories for a New Collection

1) When we open the **Category Hierarchy** we see 2 categories and several sub-categories.

2) In this Collection we will use the Campus Community sub-Category **Personal Data** which contains 67 terms.
Selecting Your Terms for a New Collection

1) We are also going to select a few terms from the HRES (Housing Real-Estate Services) category.

2) If you click on the HRES Category you can see that there are 66 terms within that Category to choose from.
1. Let’s scroll through the pages to see which terms are available to choose.

2. For this Collection we’ll select the terms **Class Year** and **College** from page 2.
Selecting Your Terms for a New Collection

1) We’ll also select **Meal Plan** from page 5.

2) Identifying your **Categories** and **Terms** for your new collection will make creating a new Collection an easier process.
Creating a Collection

1) On the Welcome page select the Collections tab.
2) Select Create Collection from the pulldown menu.
Creating a Collection

1) The Create Collections window opens.

2) Here you can:
   - Name your new Collection
   - Provide a Short Description
   - Select one or more Collection owners. Check Cedar Viewer.
   - Set Visibility to:
     i. All users and groups
     ii. Designated users and groups
Set List Display Options Window

1) The **List Options** window allows you to:

- **Set the number of Items Per Page**
- **Sort by Name**, ascending or descending
Save Options

1) When ready to **Save** you can:
   - Save and Close
   - Save and Edit Details
   - Save and Create Another Collection

2) Select **Save and Edit Details**
Edit Window

1) The **Edit** window opens. Here you can add your **Assets** to the new collection.
2) If you open the pull-down menu under **Glossary and Governance** we want to select a **Category**.
Edit Window - Select an Asset Category

1) Once the Category has loaded in the first box, you may begin typing the Category we previously chose for our Collection: Personal Data.

Note: As we begin typing available categories will appear in the data window below the box. Personal Data under Campus Community is the category that we earlier chose for our new Collection. Select it from the pull-down box.
Edit Window – Display Assets

1) Once the Category has been selected it appears below the selection window.
We now want to add the **Terms** we chose earlier to this **Collection**. They include:

- **Class Year** and **College** from page 2.
- **Meal Plan** from page 5.

If you open the **Asset** pull-down menu on the right we want to select **Term** under **Glossary and Governance**.
Edit Window - Selecting Class Year Term

1) Once **Term** has been loaded we can begin searching for the 3 terms we want to add.
2) As you begin typing **Class Year** into the asset window **Terms** with similar spelling will begin pre-loading.
3) Select **Class Year** located in the **HRES Category**.

![Diagram of the Edit Window with selected Class Year term highlighted]
Edit Window - Selecting College Term

1) Notice that the Assets we have added now appear below the search window.
2) We now want to search for the College term.
3) Select College located in the HRES Category.
Edit Window - Selecting Meal Plan Term

1) We now want to search for the Meal Plan term.
2) Notice when you type just the first letter “m” there are many Terms from which to choose. As you continue typing the number of choices diminishes.
3) Select Meal Plan located in the HRES Category.
Edit Window – Remove from List

1) If you’ve chosen the wrong Asset you may remove it from the list.
2) If you check the box to the left of the Asset. The Remove from List button activates so you can remove the Asset.

Note: Do not remove an asset at this time.
Reviewing Your Asset Selections

1) We’ve selected all of our Assets for this Collection.

2) Review your Assets to be sure you have selected your Assets from the intended Category locations.
Saving Your Collection

1) You may **Save** your choices at any time, however, you must remember to **Save** your selections or they will be lost once you leave this window.
2) At the top of the **Edit** window you may **View**, **Save**, **Cancel** or **Delete** this **Collection**.
3) Select **Save**.
Viewing Your Collection

1) To view your Collection select the pull down menu next to Collections in the blue tool bar.

2) Select All Collections.

Note: At this time the My Collections & Collections Shared with Me tabs are not working correctly.
All Collections Window

1) When the All Collections Window opens check the box to the left of the Collection you have just created to select it.
1) If you hover over your Collection name the metadata window opens to give you the Short and Long Descriptions, if there are ones.

2) From this location you can also edit the Collection, add this Collection to another Collection, and send an email to the Catalog administrator.
Open a Collection

1) **Click** on the **Collection** name to open the **Collection Details** window.
Collection Details Window

- In the Collection Details window you can **Edit**, **Delete** or **Add** to the Collection.
- The **Collection name** and **Short Description** follow.
- **General Information** includes the **Owner(s)** of the Collection, and users and groups that can view the Collection.
- The **Assets** window shows the **Categories** and **Data Items** that comprise the metadata Collection.
We’ve created our first Collection!
We in CeDAR are here to answer any questions that you may have. For IGC assistance you may contact me directly.

<table>
<thead>
<tr>
<th>Resource</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>CeDAR Website</td>
<td><a href="https://cedar.princeton.edu">https://cedar.princeton.edu</a></td>
</tr>
<tr>
<td>CeDAR Training</td>
<td><a href="https://cedar.princeton.edu/education-outreach/trainings">https://cedar.princeton.edu/education-outreach/trainings</a></td>
</tr>
<tr>
<td>Leah Targon</td>
<td><a href="mailto:leaht@princeton.edu">leaht@princeton.edu</a></td>
</tr>
</tbody>
</table>
Center for Data, Analytics and Reporting (CeDAR)