IBM InfoSphere
Version 9 Release 1

Guide to Reporting on Information Governance

IBM
Note

Before using this information and the product that it supports, read the information in “Notices and trademarks” on page 51.
Reporting on information governance

You can use Information Governance Dashboard and the companion SQL views to create reports that monitor the implementation of your information governance policies and information governance rules.

The reports show the relationships to data rules and data rule sets that are created in IBM® InfoSphere® Information Analyzer, to database tables and columns. The reports also show relationships between information governance assets, stewards that are responsible for assets, and terms that the assets are assigned to. You can set thresholds to identify where the number of exceptions or failures of data rule runs exceed your targets.

Information Governance Dashboard provides a set of sample Cognos reports that you can use or customize for your own information governance environment. You can also create ad hoc reports by dragging and dropping report elements in the Cognos workspace. You can use the sample Framework Manager model to understand the query subjects that the reports are based on.

If you used a different reporting tool, such as SAP BusinessObjects, or if you want to create your own reports independently of a tool, you can use the SQL views to create reports. The SQL views offer the ability to query governance-related metadata in the metadata repository of InfoSphere Information Server. Full documentation of the objects that you can query in the metadata repository is provided in HTML format, with diagrams and definitions. The objects include the following categories:

- IBM InfoSphere Business Glossary policies, information governance rules, categories, terms, stewards, custom attributes, and labels
- InfoSphere Information Analyzer projects, rules, rule definitions, rule sets, and metrics
- Implemented data resources that are imported into the metadata repository, including host computers, databases, schemas, database tables, and database columns.
- Other related metadata objects, such as suite users and notes.

Prerequisites for using the sample reports and SQL views

To use the sample reports and SQL views of Information Governance Dashboard, you must install the required components and create the necessary governance assets in the metadata repository.

Software prerequisites

Meet the following software prerequisites:

- You must install the Information Governance Dashboard patch:
- To use the sample reports and SQL views, you must install InfoSphere Information Server V.9.1.2 with InfoSphere Business Glossary and InfoSphere Information Analyzer.
To use the sample reports, IBM Cognos® Business Intelligence version 10.2 or 10.2.1 must be installed.

To use the Governance Dashboard model, which is a Framework Manager model, you must install Cognos Framework Manager version 10.2 or 10.2.1. The version of Cognos Framework Manager must be the same version as the version of Cognos Business Intelligence that you use.

Ensure that the web browser that you use is supported for your version of Cognos Business Intelligence: http://www.ibm.com/support/docview.wss?uid=swg27027080.

After you install the Information Governance Dashboard patch, install and configure the components of Information Governance Dashboard.

**Required assets**

To take full advantage of the available queries and reports, you must import and create the necessary metadata and relationship when you implement your information governance environment:

- Import database metadata such as tables and columns by using bridges or connectors.
- In InfoSphere Business Glossary, create policies and information governance rules and link them to each other. Create stewards and terms and link them to assets.
- In InfoSphere Information Analyzer, create data rule definitions and rule set definitions and the corresponding data rules and rule sets.
- In InfoSphere Business Glossary, link the information governance rules to the data rules and data rule sets that were created in InfoSphere Information Analyzer.

**Required roles**

While no suite roles are required to run the sample reports, the user who verifies the installation of the sample reports must have the following roles:

- Suite User
- Rules Author
- Common Metadata Importer
- Business Glossary Administrator
- Information Analyzer Data Administrator
- Information Analyzer Project Administrator

You can divide the roles between multiple users, if required.

**Setting local time for reports and SQL views**

In both reports and SQL views, time is displayed as Coordinate Universal Time (UTC).

To specify local time for the reports and SQL views, see the following technote:

Implementing an information governance environment

To use Information Government Dashboard sample reports, you must plan and implement the information governance environment. You create governance assets in InfoSphere Business Glossary and link them to data rules that you create in InfoSphere Information Analyzer.

You can build your information governance from the top down or the bottom up, or some combination of both. You can start by developing an enterprise strategy with information governance policies and information governance rules, and then creating the corresponding data rules and other assets. Or you can add information governance policies and information governance rules on top of an existing environment that contains data rules and other assets.

The following list describes the elements of an information governance environment that are used by Information Governance Dashboard sample reports and SQL views. The list is not sequential, and not all elements are required. However, the sample reports rely on the existence of information governance policies that reference information governance rules that are implemented by data rules.

Develop an information governance organization

Planning and implementing the information governance environment generally involves a cross-disciplinary team that combines business and IT departments. For more information, see the following resources:

- IBM Information Server: Integration and Governance for Emerging Data Warehouse Demands
- Design and develop information governance policies and information governance rules

Establish high-level policies and rules


Import data and metadata

Use InfoSphere Information Analyzer to import data and metadata. You can also use InfoSphere Metadata Asset Manager to import metadata assets such as database tables and columns (http://pic.dhe.ibm.com/infocenter/iisinfsv/v9r1/topic/com.ibm.swg.im.iis.mmi.doc/topics/t_importing_metadata_into_staging_area.html).

Set up data quality analysis

Use InfoSphere Information Analyzer to create and run data rules and create metrics (http://pic.dhe.ibm.com/infocenter/iisinfsv/v9r1/topic/com.ibm.swg.im.iis.ia.quality.doc/topics/dq_analyzing_dataquality.html). The rules and metrics represent the knowledge that your enterprise developed over time to meet its data quality objectives.

Create categories and terms, and assign assets

Use InfoSphere Business Glossary to plan, design, and deploy a business glossary (http://pic.dhe.ibm.com/infocenter/iisinfsv/v9r1/topic/com.ibm.swg.im.iis.bg.bestp.doc/topics/c_iadmgde_BuildingGlossary.html). Create categories and terms that capture and represent the vocabulary that is used in your organization and assign information assets to the terms.

Define accountability

Use InfoSphere Business Glossary or InfoSphere Metadata Workbench to
To assign stewards to assets, visit the [Information Governance Dashboard](http://pic.dhe.ibm.com/infocenter/iisinfsv/v9r1/topic/com.ibm.swg.im.iis.bg.bestp.doc/topics/c_Create_stewards.html).

**Link information governance policies to information governance rules**

You can set the linkage in InfoSphere Business Glossary when you create or edit an information governance policy or information governance rule. You can also set relationships between policies and between rules.

The following graphics show the policy IGD Dashboard Configuration Validity and the information governance rule IGD Configuration Parameter Validation in InfoSphere Business Glossary after the two are linked. The information governance rule is also linked to two data rules that implement it.

![IGD Dashboard Configuration Validity](image1)

![IGD Configuration Parameter Validation](image2)

**Link information governance rules to data rules**

In InfoSphere Business Glossary, when you create or edit an information governance rule, you can set the Implemented By relationship to data rules or data rule sets.

**SQL views and model schemas for Information Governance Dashboard**

You can use the SQL views to create your own reports and to understand the sample reports for Information Governance Dashboard. You can use the model schemas to design business intelligence reports or SQL applications.

After you install Information Governance Dashboard, you create a set of SQL views and a set of model schemas that correspond to each view schema. You can use the SQL views to query objects in the InfoSphere Information Server metadata repository that would otherwise not be accessible to SQL queries. The model schemas are created as a convenience for users of reporting and modeling tools.
The views are grouped in schemas for the following domains: common metadata, data quality, and information governance.

You can access the HTML documentation for these schemas from the following technical support document: http://www.ibm.com/support/docview.wss?uid=swg27039651. The documentation includes descriptions of all objects and properties that are used in the SQL views.

**Note:** Do not use SQL views to update objects in the metadata repository. The SQL views are read-only on DB2 databases, but not on Oracle databases. Trying to use the views to write to the metadata repository could damage the contents of the repository.

**View schemas**

The following views are used to query objects in the metadata repository.

**CMVIEWS**
Contains views of a subset of common metadata object types that represent database metadata that is imported by bridges or connectors. These views describe hosts, databases, schemas, tables, views, stored procedures, and columns. In addition, there are general views of notes, users, and stewardship assignments.

**IA VIEWS**
Includes views of object types from the data quality domain that are created in InfoSphere Information Analyzer. The object types include projects, data rules, data rule sets, data rule definitions, and data rule set definitions. The schema also contains many views that are necessary to link analysis objects to other objects, such as database columns.

**IGVIEWS**
Includes views of object types from the information governance domain that are created in InfoSphere Business Glossary, including categories, terms, labels, information governance policies, and information governance rules. The schema also includes views that link information governance objects to the data rules that implement them and to other assets.

The views in the different schemas overlap because objects in different domains can use the same object with a different purpose through a different relationship.

**Model schemas**

Instead of views, the model schemas contain tables that have the same name and structure as the views in the corresponding view schemas. The tables are not meant to store data. They are used as references of the view models. The tables contain the primary and foreign keys, while the views do not. The model schemas were used to generate the HTML documentation of the views.

You can import the model schemas into reporting or modeling tools to design business intelligence reports or SQL applications that run on top of the views. The model schemas correspond to folders in the PhysicalView in the Cognos Framework Manager model for Information Governance Dashboard.

The following model schemas are included:
MCMVIEWS
Corresponds to the view schema CMVIEWS, which contains primarily common metadata objects.

MIAVIEWS
Corresponds to the view schema IAVIEWS, which contains primarily objects that are created by InfoSphere Information Analyzer

MIGVIEWS
Corresponds to the view schema IGVIEWS, which contains primarily objects from the information governance domain that are created in InfoSphere Business Glossary

Related concepts:
“Governance Dashboard model” on page 40
The model organizes query subjects into the logical components of the metadata model for Information Governance Dashboard.

Related tasks:
“Creating SQL views and model schemas for Information Governance Dashboard”
After you install the Information Governance Dashboard patch, you must run scripts to create the SQL views and the model schemas that are used by the reports.

Installing and configuring components of Information Governance Dashboard

Before you can run the sample information governance reports or use the SQL views and model schemas, you must complete installation and configuration tasks.

Creating SQL views and model schemas for Information Governance Dashboard

After you install the Information Governance Dashboard patch, you must run scripts to create the SQL views and the model schemas that are used by the reports.

Before you begin

You must install the Information Governance Dashboard patch.

To run the scripts in this task, you must log in to SQLPlus as sysdba.

About this task

Information governance dashboard is supported on installations of InfoSphere Information Server that use IBM DB2 databases or Oracle databases to host the metadata repository. This procedure is required for DB2 and Oracle databases.

Procedure

1. For Oracle databases only, do the following steps:
   a. Create the following users, and assign them to the XMETA tablespace:
      • cmviews
      • Mcmviews
      • igviews
      • Migviews
For more information on creating users, see the documentation on configuring an existing Oracle installation (http://pic.dhe.ibm.com/infocenter/iisinfsv/v9r1/topic/com.ibm.swg.im.iis.productization.iisinfsv.install.doc/topics/wsisinst_pre_install_oracle_db.html).

b. Log in to SQLPlus as sysdba, and give all required permissions so the newly created users can access each other's tables and can create views. For example:

   grant SELECT ANY TABLE to cmviews;
   grant CREATE ANY VIEW to cmviews;
   grant SELECT ANY TABLE to MCMviews;
   grant ALTER ANY TABLE to MCMviews;
   ...

2. If an Information Governance Dashboard patch was previously installed and is still installed, open the folder IIS_HOME/InformationGovernanceDashboard/SQL/DROP/database, where IIS_HOME is the installation folder for InfoSphere Information Server and database is your installed database, either db2_10_1_nls or oracle11g_nls. Run the script GD_DROP_VIEWS_ALL.sql.

3. If the schema or user name for the metadata repository is other than XMETA, in the folder IIS_HOME/InformationGovernanceDashboard/SQL/CREATE/database, open the file GD_VIEWS_ALL.sql, and replace all instances of XMETA that are followed by a period (.) with the schema name. Be sure to replace only those instances of XMETA that are followed by a period. Replace XMETA. with schema_name., where schema_name is the name of the schema or user that was used during installation of InfoSphere Information Server. For example, the following passage of code is from a CREATE statement:

   FROM XMETA.ASCLModelDataCollectinbic497ce A0 WHERE A0.isView_xmeta = 1
   AND A0.of_DataSchema_xmeta IS NOT NULL

   If the schema name is MDRP, when you replace all instances of XMETA that are followed by a period, the result is the following:

   FROM MDRP.ASCLModelDataCollectinbic497ce A0 WHERE A0.isView_xmeta = 1
   AND A0.of_DataSchema_xmeta IS NOT NULL

4. In the folder IIS_HOME/InformationGovernanceDashboard/SQL/CREATE/database_type, run the script GD_VIEWS_ALL.sql to create the required views and tables.

5. For Oracle databases only, grant users the permission to create references for foreign keys. In the folder IIS_HOME/InformationGovernanceDashboard/SQL/MISC/database, run the script reference_permissions.sql.

6. Create foreign keys for tables: In the folder IIS_HOME/InformationGovernanceDashboard/SQL/FK/database, run the script GD_VIEWS_ALL_FK.sql.

Related reference:

“SQL views and model schemas for Information Governance Dashboard” on page

You can use the SQL views to create your own reports and to understand the sample reports for Information Governance Dashboard. You can use the model schemas to design business intelligence reports or SQL applications.
Creating and customizing the Information Governance Dashboard configuration tables

You create tables that hold translation mappings, threshold values, and connection information.

Before you begin

You must log in to SQL Plus as sysdba to run the script in this task.

About this task

The Information Governance Dashboard accesses configuration data to provide content that is adapted to the environment in which you use the dashboard. This configuration data is stored in two tables, MSG_LIB and SETUP_PARAMETER. The tables store the following information:

- Mappings of report labels that represent descriptive text to translations for specific locales
- Connection information that links report content with content in InfoSphere Business Glossary
- Threshold values that are used in reports to highlight success and failure rates for runs of data rules

You can create the tables in the metadata repository by importing . This database is named XMETA by default.

Procedure

1. Copy the CreateIGDConfigTables.sql file from Information_Server_Home/InformationGovernanceDashboard/setup/configuration to a temporary location.
2. Open CreateIGDConfigTables.sql in a text editor. The file contains lines that include parameter name and parameter value pairs. For example:
   
   ```sql
   INSERT INTO IGB.SETUP_PARAMETER VALUES ('<parameter name>', '<parameter value>');
   ```

3. Replace the string `<parameter value>` for each of the following parameters with values that are correct for your environment.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Parameter value</th>
</tr>
</thead>
<tbody>
<tr>
<td>BG_HOSTNAME</td>
<td>The name of the server that hosts InfoSphere Business Glossary</td>
</tr>
<tr>
<td>BG_PORT</td>
<td>The port that is used to access InfoSphere Business Glossary</td>
</tr>
</tbody>
</table>

   For example, if you access InfoSphere Business Glossary with the URL http://myserver.mycompany.com:9080, the entries become:

   ```sql
   INSERT INTO IGB.SETUP_PARAMETER VALUES ('BG_HOSTNAME', 'myserver.mycompany.com');
   INSERT INTO IGB.SETUP_PARAMETER VALUES ('BG_PORT', '9080');
   ```

4. If necessary, change the default thresholds for indicating failure and success rates for runs of data rules. These thresholds are used in some reports to give a quick indication of the status. The default values represent the percentage of successful runs for each threshold. For more information, see "Target thresholds for runs of data rules" on page 32.

<table>
<thead>
<tr>
<th>Threshold name</th>
<th>Default value</th>
</tr>
</thead>
<tbody>
<tr>
<td>GLOBAL_TARGET_UPPER_THRESHOLD</td>
<td>0.98</td>
</tr>
<tr>
<td>GLOBAL_TARGET_LOWER_THRESHOLD</td>
<td>0.94</td>
</tr>
</tbody>
</table>
5. For Oracle databases only, create the user igdconfig and assign it to the XMETA tablespace. Log in to SQLPlus as sysdba, and give igdconfig the required permissions to create and read tables.
6. Create the schema IGDCONFG.
7. Run the script CreateIGDConfigTables.sql to create the required views and tables.

Deploying the Information Governance Dashboard package

You must deploy the package into IBM Cognos before you can run the sample reports.

Before you begin

Ensure that the web browser that you use is supported for your version of Cognos Business Intelligence.

If you previously installed patch 1 of Information Governance Dashboard, do one of the following actions before you install patch 2:
- Remove the previously installed Information_Governance_Dashboard package.
- Move the previously installed package to a new folder.

Procedure

1. Copy the IGD_Deployment_Archive.zip file from Information_Server_Home/InformationGovernanceDashboard/report_deployment_package to Cognos Home/deployment, where Cognos_Home is the location of your Cognos installation. For example, you might copy the file to c:\Program Files\ibm\cognos\c10_64\deployment.
2. Open the link to your Cognos server, http://Server/Cognos_URL/, where Server is the Cognos server and Cognos_URL is the rest of the URL. For example, http://mycognosserver.mycompany.com/cognos10/.
3. Click Launch, and select IBM Cognos Administration.
4. On the IBM Cognos Administration page, select the Configuration tab, and click Content Administration in the list on the left of the tab.
5. Click the New Import icon in the list of icons.
6. Select IGD_Deployment_Archive from the list of available deployment archives, and click Next.
7. On the Specify a name and description page, verify that the name is Information_Governance_Dashboard_20130924a and click Next.
8. On the Select the public folders content page of the New Import wizard, select the package name Information_Governance_Dashboard, and click Next.
9. Click Next until you reach the Select an action page, and then click Finish.
10. To start the import, click Run.
11. To view the import details, click OK.
12. To view the import results and verify that all 98 objects were imported successfully, click Refresh. If any objects are listed as failed, check to make sure that access rights are set properly at the file level and that you are using Cognos Business Intelligence version 10.2 or 10.2.1.
13. Click Close.
Defining the data source connection for Information Governance Dashboard

You define a data source connection to connect to the InfoSphere Information Server metadata repository.

Before you begin

Make sure that the server that is running Cognos Business Intelligence can access the InfoSphere Information Server metadata repository database.

About this task

The sample reports are based on SQL queries on metadata views and on configuration data. For the queries to work, you must create a data source connection in Cognos Business Intelligence to the InfoSphere Information Server metadata repository database, by default named XMETA.

Procedure

1. In a web browser, connect to your Cognos server, http://SERVER/COGNOSURL/, and start the IBM Cognos Administration application.
2. Select the Configuration tab, and click Data Source Connections.
3. Click the New Connection icon.
4. In the New Data Source wizard, enter xmeta as the connection name, optionally provide descriptive text, and click Next.
5. In the Type field, select IBM DB2. Make sure that Configure JDBC connection is selected, and click Next.
6. On the wizard page for specifying the connection string, complete the following steps.
   a. Enter the database alias.
   b. Select Password.
   c. Enter the ID of a user with read access to the views and configuration tables in the xmeta database in the User ID field. You might create a dedicated user named igduser for this purpose. On Oracle, make sure this user is assigned to the XMETA table space. Grant the user select access to all views and tables in the schemas cmviews, igviews, iaviews, and igdconfig.
   d. Enter the password.
   e. Click Test the connection, and verify that the connection is successful.
   f. Click Next.
7. On the next page, complete the following steps.
   a. Enter the name of the server that hosts the database.
   b. Enter the database port.
   c. Enter xmeta as the name of the database.
   d. Click Test the connection.
8. Click Finish.

Installing report images for Information Governance Dashboard

You install the icons and images that are used by the sample reports.
Procedure

1. Create a folder named `governance_images` under `COGNOS_HOME/webcontent/samples`, where `COGNOS_HOME` is the location where IBM Cognos is installed.

2. Copy the files `Green.gif`, `Yellow.gif`, and `Red.gif` from `Information_Server_Home/InformationGovernanceDashboard/setup/images` to the `governance_images` folder that you created in the previous step.

Verifying installation of sample reports for Information Governance Dashboard

You can import sample metadata and configure the environment to verify that the sample reports are installed correctly. This verification is helpful if you do not yet have metadata in the metadata repository, or if you have not implemented an information governance environment.

Before you begin

Assign the required suite roles to one or more users. See “Prerequisites for using the sample reports and SQL views” on page 1 for a list of the required roles.

About this task

You import metadata from the configuration tables in the XMETA database into the metadata repository in a development or test environment, but not on a production system.

Procedure

1. Import metadata from the configuration tables:
   a. As a user with administrative permissions, open the InfoSphere Information Server console.
   b. Click the Home icon in the upper left corner, and click Configuration > Sources.
   c. If the computer that hosts the XMETA database is not listed on the Sources tab, select New Host Computer and add it.
   d. Select the host, click the task New Data Store, and enter `XMETA` as the data store name. Define a data connection named `XMETA_CONNECTION` with the appropriate type of connector. Select the database name, and test the connection. Save the new definition.
   e. Click Metadata Management > Import Metadata, and expand the host. Select the XMETA data store that you added in the previous step, and click Identify Next Level. The Discover Metadatapage lists the schemas that are discovered. Click OK to add them to the Data Sources column. Expand XMETA to see a list of the discovered schemas.
   f. Select IGDCONFIG and click Identify All Levels. The Discover Metadata page lists the two tables `MSG_LIB` and `SETUP_PARAMETER`. Click OK to add them to the Data Sources column. Expand IGDCONFIG to see them listed.
   g. Select the SETUP_PARAMETER table, and click Import. Click OK on the Import Metadata page.
   h. Select the MSG_LIB table, and click Import. Click OK on the Import Metadata page.

2. Open an operating system command window, and run the following command:
3. Configure users who can access the sample metadata:
   a. Click **Configuration > Users**.
   b. On the Users tab, select a project user that has the roles of Rules Author, Information Analyzer Business Analyst, Information Analyzer Data Steward, and Information Analyzer Data Operator.
   c. Click **Configuration > Analysis Settings**.
   d. On the Analysis Engine tab, enter the credentials of a DataStage user who has the privilege to run jobs, or clear the check mark from **Use static DataStage credentials** to select the project user.

4. Configure and validate data rules:
   a. On the project menu, click **Develop > Data Quality**

   ![Data Quality](data_quality.png)

   b. Run the IGDConfigCheck_DR data rule, and view the result. Verify that the run successfully processed all records with \#met = 100%.
   c. Run the IGDFailingOnPurpose_DR data rule, and view the result. Verify that the run failed on all records with \#met = 0%.
   d. Run the IGDConfigValidationMetric metric and, view the result. Verify that the result is 100%.
   e. Run the IGDConfigValidationSet data rule set, and view the result. Verify that the Mean% column under Rules Not Met Per Record shows 50%.

5. Import the information governance policy and information governance rule from the installation folder into InfoSphere Business Glossary:
   a. Log on InfoSphere Business Glossary as an administrative user.
   b. Import `Information_Server_Home/InformationGovernanceDashboard/setup/installation_verification/iv_glossary_import.xml`. This action creates the information governance policy IGD Dashboard Configuration Validity and a corresponding information governance rule, IGD Configuration Parameter Validation.
   c. Open the definition of the IGD Configuration Parameter Validation information governance rule, and click **Edit**.
   d. Expand the section **Implemented By**, and select the asset type **Data Rule**. Enter IGD into the search field.
   e. Select the data rules IGDConfigCheck_DR and IGDFailingOnPurpose_DR, and click **Save**.

6. Open Information Governance Dashboard and verify the results:
   a. Connect to `http://SERVER/COGNOSURL/`, where **SERVER** is the Cognos Connection host computer and **COGNOSURL** is the Cognos Connection URL.
b. Verify the successful execution of the IGD Installation Verification report in
Public Folders > Dashboard > Information Governance Dashboard >
Reports. You should see the following results:

- All of the report sections contain information and are not empty.
- The Icon Library section displays three icons.
- Two data rules exist for the policy IGD Dashboard Configuration Validity.
- The policy has one referenced information governance rule, IGD
  Configuration Parameter Validation, which is implemented by the two
data rules.
- There is one exception for the data rule IGDFailingOnPurpose_DR. All
  records failed.
- All records passed for the data rule IGDCfgCheck_DR.
- The metric score for both data rules is 100.
- The report sections Information Governance Rules, Data Rules, Data Rule
  Sets, and Metrics all display the results of step 4.

If you see only the metric score, take the following steps:

- Verify in the InfoSphere Information Server console that the data rules
  ran successfully.
- Verify in InfoSphere Business Glossary that the data rules are linked to
  the information governance rule IGD Configuration Parameter Validation
  by the Implemented By relationship.
- Verify the values for the parameters BG_PORT, BG_HOSTNAME,
  GLOBAL_TARGET_UPPER_THRESHOLD, and
  GLOBAL_TARGET_LOWER_THRESHOLD in the Setup Parameters
  section.

What to do next

To ensure that only your own enterprise metadata appears in the metadata
repository, you might want to delete the metadata that you imported in this task:

- Delete the project in InfoSphere Information Analyzer.
- Delete the information governance policy and information governance rule in
  InfoSphere Business Glossary.
- Delete the imported database on the Repository Management tab of InfoSphere
  Metadata Asset Manager.

Information Governance Dashboard sample reports

You can use the sample IBM Cognos reports to report on your information
governance environment. You can customize them by using IBM Cognos
Connection.

Viewing the Information Governance Dashboard sample reports

You can access dashboard reports, charts, lists, and drill reports in the Public
Folders section of IBM Cognos Connection.

The main access to the sample reports is through the tabs of the Information
Governance Dashboard workspace. A shortcut to the workspace is at the highest
level of the Information_Governance_Dashboard folder.
The Information Governance Dashboard workspace displays information about the success or failure of runs of data rules that are linked to information governance policies. The workspace includes tabs for governance performance, data quality, information currency, and metrics for terms.

The Reports folder contains all of the charts, lists and drill through reports that appear in the Information Governance workspace. It also contains many additional charts and lists. The drill reports are accessed by links in charts, lists, or reports.

You can drag charts and lists onto a workspace from the Content tab. The following image shows the folder structure of the Content tab in Cognos Connection.

The Reports folder contains two domains that are represented by folders:
Data Quality

The Data Quality folder includes charts, lists, and drill reports from the data quality domain. The domain focuses on InfoSphere Information Analyzer objects such as data rules and data rule definitions and metrics.

Information Governance

The Information Governance folder includes charts, lists, and drill reports for the information governance domain. The domain focuses on InfoSphere Business Glossary objects such as information governance policies, information governance rules, categories, terms, and stewards, and on related implemented data resources, such as database tables and columns.

The data quality and information governance domains in the sample reports correspond to folders of the same name in the LogicalView in the Framework Manager model.

The package contains the following report pages that can be started either by URL or by browsing in Cognos Connection:

**Policy Implementation Status report**
Displays your progress in implementing information governance policies and information governance rules.

**IGD Installation Verification report**
Verifies that dashboard components are installed and configured correctly.

**IGD Project Verification report**
Displays the assets in your information governance project and the relationships between them.

### Terminology conventions in Information Governance Dashboard and the SQL views

The terminology that is used in views and reports is the product of several different suite tools.

Information Governance Dashboard and the SQL views that underlie it enable reporting on a range of metadata objects that describe governance status across the domains of data quality and information governance. The dashboard uses the following terminology conventions for objects that appear in reports and charts.

### Information Governance domain

The information governance domain consists of views of metadata objects that are created in InfoSphere Business Glossary, such as categories, terms, stewards, labels, information governance policies, and information governance objects. The domain also consists of objects that these governance objects govern or link to, including database tables and database columns.

It is important to understand how the following terms are used in this domain:

**Information governance policy**
An information governance policy is a natural-language description of a governance subject area. You can organize information governance policies in a hierarchy that is based on their meaning and relationships to one another. Each information governance policy can contain multiple information governance subpolicies. Each information governance policy can reference one or more information governance rules.
In this document and in the charts, reports, and SQL views, information governance policies are often referred to as policies.

**Important:** Policies that were created in InfoSphere Information Analyzer are not information governance policies and are not represented in the SQL views or the sample reports.

**Information governance rule**
An information governance rule is a natural-language description of the criteria that are used to determine whether information assets are compliant with business objectives.

Information governance rules can be referenced by one or more policies, or by no policies. Information governance rules can be implemented by assets such as data rules, and can govern assets such as database tables and columns.

**Data quality domain**
The data quality domain includes metadata assets that are created in InfoSphere Information Analyzer, such as data rules, data rule definitions, data rule sets, data rule set definitions, metrics, and database assets such as columns that are bound to data rules. One focus of many of the Information Governance Dashboard reports and charts is the percentage of success for the latest run of a data rule: how many records passed and how many failed.

It is important to understand how the following terms are used in this domain.

**Data rule definition**
A data rule definition defines the logic and the validity benchmark for one or more data rules.

**Data rule**
A data rule is an executable rule that applies the logic of a data rule definition against a specific database column. Data rules can implement information governance rules.

**Data rule set definition**
A data rule set definition is a collection of data rule definitions. Data rule set definitions are designed to capture how a record within a data source conforms to multiple data rules; for example, how many rules a specific record breaks.

**Data rule set**
A data rule set is an executable rule set that is created from a data rule set definition by selecting actual data to be used for each term or variable in the definition. A data rule set can identify the overall quality or confidence in a data source.

**Exception**
In InfoSphere Information Analyzer, *exception* is used to mean the failure of a single record in the run of a data rule. In Information Governance Dashboard reports and charts, *exception* generally means the failure of the run of a data rule to meet its target success rate. Thus a report might list hundreds of failures of records in a single run but only one exception.

**Target**
The target success rate that appears in charts and reports is not generated by querying the metadata repository. It is a threshold level that you set.
When you install the configuration database. For more information, see “Creating and customizing the Information Governance Dashboard configuration tables” on page 8.

Because governance requires rules, there are multiple repository objects whose names include *rule*. For the sake of clarity, the following objects are referred to by their full names, and are not called simply *rules*:

- Information governance rules
- Data rule definitions
- Data rules
- Data rule set definitions
- Data rule sets

**Information Governance Dashboard workspace**

The Information Governance Dashboard workspace includes charts and lists that cover the areas of governance, data quality, information currency, and term assignments. The workspace demonstrates how to organize your reports so that you can quickly find the information that you need.

To access the main workspace page, on the Public Folders tab of IBM Cognos Connection, click **Information_Governance_Dashboard** and then click **Information Governance Dashboard (shortcut)**.

The workspace includes tabs for governance performance, data quality, information currency, and metrics for terms. The Governance Performance tab is displayed by default. Click the buttons in the left pane to switch between tabs.

![Governance Performance](image)

You can add other charts and reports to the workspace by dragging them from the Content tab on the right side of the screen. You can drill through most charts and reports to access further details.

**Governance Performance tab of Information Governance Dashboard workspace**

The governance performance charts display how well you are achieving your data quality targets and how well you implemented and provided stewards for your policies and information governance rules.

To access the Governance Performance tab, on the Public Folders tab of IBM Cognos Connection, click **Information_Governance_Dashboard** and then click **Information Governance Dashboard (shortcut)**. The Governance Performance tab is displayed by default.
The Governance Performance tab contains the following charts:

**Data Quality**
For all data rules, the chart displays the average performance against the target success rate that you specified. Click the hand of the gauge to drill through to the report Data Rule Execution Results vs. Target per Data Rule, which shows results for each data rule. Click a data rule in the report to view details for the data rule, including related policies, information governance rules, data rule bindings, and exceptions.

**Information Governance Implementation**
The chart displays the following information:
- The percentage of policies that are linked to information governance rules
- The percentage of information governance rules that are linked to data rules
- The percentage of information governance rules that govern assets

Click any hand of the gauge to display the Policy Implementation Status report, which shows numbers instead of percentages for the same data.

**Steward Assignment**
The chart displays the percentage of policies and the percentage of information governance rules to which steward is assigned. Click either hand of the gauge to display the Steward Assignment Status report. The report shows the number of policies with and without stewards and the number of information governance rules with and without stewards.

**Example of drill-through**
The following Information Governance Implementation chart indicates that 36.1 percent of policies reference information governance rules. The chart also shows that about 8 percent of information governance rules are implemented by data rules, and that more than 80 percent of information governance rules govern assets.
If you click any hand, the Policy Implementation Status report is displayed. The report shows the same information as the chart, but in numbers instead of percentages.

**Policy Implementation Status**

This report shows the status of governance implementation for policies and rules.

Related tasks:
“Filtering reports and charts for Information Governance Dashboard” on page 30

To make important information more accessible to users, you can filter long or complex reports.

Related reference:
“Target thresholds for runs of data rules” on page 32

You can indicate the relative levels of success of data rule runs by setting target thresholds for Information Governance Dashboard reports.
Data Quality tab of Information Governance Dashboard workspace

The data quality charts display success and failure percentages for all runs of data rules. The charts also display the number of data rule exceptions per policy, per information governance rule, and per steward.

To access the Data Quality tab, click **Data Quality** in the left pane of the Information Governance Dashboard workspace.

The Data Quality tab contains the following charts and list:

**Data Rule Execution Results**

For all data rules, the chart displays the minimum and maximum rate of successful execution, and the average rate of success. Click any hand of the gauge to display the report Data Rule Execution Results vs. Target per Data Rule, which shows results for each data rule. Click a data rule in the report to view details for data rule, including related policies, information governance rules, data rule bindings, and exceptions.

**Exceptions per Policy**

The chart displays the number of exceptions that occurred for runs of all data rules for each information governance policy. Click an area that represents a policy to open the Data Quality Details for Policy report for that policy. The details report displays exceptions for each data rule that
implements the policy. The details report also displays the information governance rules that the policy references, the data rules, and the database tables whose columns are bound to the data rules. You can click each asset to display its details report.

Exceptions per Information Governance Rule
The chart displays the number of exceptions that occurred for runs of all data rules for each information governance rule. Click an area that represents an information governance rule to open the Data Quality Details for Information Governance Rule report. The details report displays exceptions for each data rule that implements the information governance rule. The details report also displays policies that reference the information governance rules, the data rules, and the database tables whose columns are bound to the data rules. You can click each asset to display its details report.

Exceptions per Steward
The chart displays, for each steward, the number of exceptions that occurred during the latest runs of data rules. Click the area that represents a steward to open the Data Quality Details for Steward report. The details report displays the data rules that the steward is assigned to, the related information governance rules, and the database tables whose columns are bound to the data rules. You can click each asset to display a report that is specific to the asset.

Health Summary by Data Rules
For each data rule, the health summary lists the following information:
- The information governance rule that governs it
- The policy that references the information governance rule
- The number and percentage of records that passed and failed
- The target percentage
- An icon that indicates the success rate of the last run of a data rule according to target thresholds that you specify for all data rules or specific data rules.
- The last run time
- The trend of success of failure

Click an asset name to display a details report for the asset.

Example of drill-through
The following Data Rule Execution Results chart indicates an average pass rate of 75.2 percent for runs of data rules. The lowest pass rate for a run is zero and the highest is 100 percent.
If you click any of the hands, the Data Rule Execution Results vs. Target per Data Rule report is displayed.

If you click the blue horizontal bar, the data quality details report for the data rule is displayed.

Each row of the report shows the performance against target for a particular data rule. The red rectangle indicates the target level that you specified for percentage of runs passed. The blue horizontal bar indicates the actual percentage of runs of the data rule that passed. The target achievement level is calculated by dividing the target percentage into the actual percentage.

If you click the blue horizontal bar, the data quality details report for the data rule is displayed.
For the selected data rule, the details report lists and links to the related policies, information governance rules, and data rule bindings. The Exceptions section shows the results of the latest run of the rule. The red X icon indicates that the percentage of records that passed did not meet the lowest target threshold that you set.

If you click the data rule name at the top of the report, you can view the data rule details in InfoSphere Business Glossary.

Related tasks:
“Filtering reports and charts for Information Governance Dashboard” on page 30
To make important information more accessible to users, you can filter long or complex reports.

Related reference:
“Target thresholds for runs of data rules” on page 32
You can indicate the relative levels of success of data rule runs by setting target thresholds for Information Governance Dashboard reports.
Information Currency tab of Information Governance Dashboard workspace

The information currency charts track how recent or out-of-date your data rule runs are. Identifying the oldest runs helps you ensure that your information is current.

To access the Information Currency tab, click Information Currency in the left pane of the Information Governance Dashboard workspace.

The Information Currency tab contains the following charts:

Data Quality Currency

Across all data rules, the chart shows the newest, oldest, and the average age of your data runs. You can click any hand on the gauge to drill down to charts that show the following information:

- The age of the oldest runs per policy
- The age of the oldest runs per information rule that is referenced by a selected policy
- The age of the latest runs of data rules that implement a selected information governance rule

Age for Latest Run per Data Rule

This chart displays the age of the latest runs for all data rules.

Example of drill-through

The following Data Currency chart indicates an average age of 76 days for all runs of data rules. The oldest run is 195 days old and the newest is 41 days old.
If you click any of the hands, the Age of Latest Run per Policy report is displayed. From the latest runs of data rules, the report shows the age of the oldest run for each policy and the date of the run.

If you click the bar that represents the Customer Information policy, the Age of Latest Run for Policy report is displayed for the Customer Information policy. This report displays the age of the oldest data rule runs for the two information governance rules that are referenced by the Customer Information policy.
If you click the bar for the information governance rule Restrict Customer Financial Data to Accounts Under 7G, the Age of Latest Run for Information Governance Rule report is displayed for the selected information governance rule. The report shows the age of the latest run for each of the three data rules that implement the information governance rule.

Related tasks:
“Filtering reports and charts for Information Governance Dashboard” on page 30
To make important information more accessible to users, you can filter long or complex reports.

Related reference:
“Target thresholds for runs of data rules” on page 32
You can indicate the relative levels of success of data rule runs by setting target thresholds for Information Governance Dashboard reports.

**Metrics for Terms tab of Information Governance Dashboard workspace**
The term metric charts display the number of terms of each status, and the number of terms that have stewards or assigned assets.

To access the Metrics for Terms tab, click **Metrics for Terms** in the left pane of the Information Governance Dashboard workspace.
The Metrics for Terms tab contains the following charts:

**Terms by Status**
The chart displays the number of terms in the metadata repository of each status: accepted, candidate, deprecated, and standard. Click the section for a status to display a list of all terms of that status and their parent categories. Click the name of a term or category to open details for the term or category in InfoSphere Business Glossary.

**Steward Assignment to Term**
The chart displays the number of terms that have stewards, and the number of terms that do not have stewards. Click the section for terms that have stewards to see a list of the stewards, related terms, and parent categories. Click the section for terms that do not have stewards to see the full list of terms that do not have stewards. Click the name of a term, category, or steward to display its details in InfoSphere Business Glossary.

**Asset Assignment to Term**
The chart displays the number of terms that have assets that are assigned and the number of terms that do not have assigned assets. Click the section for terms with assets assigned to see a list of terms and their assigned assets. Click the section for terms with no assets assigned to see a full list of terms with no assigned assets. Click the name of a term, category, or asset to display its details in InfoSphere Business Glossary.

**Term Assignment to Asset**
The chart displays the number of assets that are assigned to terms and the number of assets that are not assigned to terms.

**Example of drill-through**
The following Terms by Status chart indicates that there are 28 terms with the status ACCEPTED.
If you click the section for the ACCEPTED status, the Terms by Status report for terms of that status is displayed.

### Terms by Status: ACCEPTED

This report shows details about the status of Business Glossary terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>Data Classifications</td>
</tr>
<tr>
<td>Address</td>
<td>Data Classifications</td>
</tr>
<tr>
<td>Age</td>
<td>Data Classifications</td>
</tr>
<tr>
<td>Canadian Social Insurance Number</td>
<td>Data Classifications</td>
</tr>
<tr>
<td>City Code</td>
<td>Data Classifications</td>
</tr>
<tr>
<td>Company Name</td>
<td>Data Classifications</td>
</tr>
<tr>
<td>Computer Name</td>
<td>Data Classifications</td>
</tr>
<tr>
<td>Country Code</td>
<td>Data Classifications</td>
</tr>
<tr>
<td>Country Code On RFM Qual1</td>
<td>Reference Data Management</td>
</tr>
<tr>
<td>Credit Card Number</td>
<td>Data Classifications</td>
</tr>
</tbody>
</table>

The report lists all terms that have the ACCEPTED status and the parent category for each term.

You can click the link for a term or category to display the term or category in InfoSphere Business Glossary.
To make important information more accessible to users, you can filter long or complex reports.

**Related reference:**

“Target thresholds for runs of data rules” on page 32

You can indicate the relative levels of success of data rule runs by setting target thresholds for Information Governance Dashboard reports.

**Information Governance Dashboard - Project Verification report**

The Information Government Dashboard - Project Verification report helps diagnose why expected data does not show up in your reports. The report provides an inventory of content in the metadata repository that is relevant to your information governance implementation.

If you have a very large metadata repository, you might want to use Cognos Report Studio to apply filtering and ranking to the Information Governance Dashboard - Project Verification report, as described in “Filtering reports and charts for Information Governance Dashboard” on page 30.
If the report is very large, you might want to export it PDF or CSV format for easier viewing.

The report is in Public Folders > Information_Governance_Dashboard > Reports > IGDProjectVerification.

The Information Governance Dashboard - Project Verification report contains the following tables and charts:

**Information Governance Rules**
- The table lists all information governance policies and information governance rules. For each information governance rule, the table lists all governed assets and the type of governed asset.

**Data Rules**
- The table lists all data rules. For each data rule, the table lists the bound databases, schemas, tables, and columns. The table lists the start time of the last run of each data rule, the number of records that were processed and the percentage that passed and failed.

**Notes per Data Rule**
- The table lists each data rule that has notes, and the name and value of each related note.

**Data Rule Sets**
- The table lists each data rule set and its associated data rules. For the latest run of each data rule set, the table lists the total records that were processed and the percentage that passed and failed for each data rule.

**Metrics**
- The table lists all metrics and their associated data rules. The table also lists the time stamp of the last calculation and the metric score.

**Data Rules per Policy**
- For each policy, the chart shows the number of data rules.

**Exceptions per Data Rule**
- For each data rule, the chart shows the number of exceptions.

### Filtering reports and charts for Information Governance Dashboard

To make important information more accessible to users, you can filter long or complex reports.

### About this task

In a mature information governance environment, reports can become long and complex. For example, when the metadata repository of InfoSphere Information Server contains tens of thousands of database columns, a report that displays each database column and its related term is not suited for reading on the web.

Such reports can provide valuable information, however. When very long reports are necessary, you can make them more accessible to users by exporting them in PDF or in comma-separated values (CSV) format.

Often it is possible to filter the information to show only the most important results. For example, you might display in a chart the five data rules with the most exceptions, rather than every data rule that has exceptions.
As your information governance environment grows, you might want to filter some of the sample reports.

For detailed information on filtering and ranking results, see the documentation for Cognos Report Studio: [http://pic.dhe.ibm.com/infocenter/cbi/v10r2m0/index.jsp](http://pic.dhe.ibm.com/infocenter/cbi/v10r2m0/index.jsp)

**Procedure**

1. Open the report in Cognos Report Studio and go to the query.
2. Define a new query item and rank the relevant metric with the RANK function. For example, you might rank the results according to the number of terms per category.
3. Add a filter to limit the results. For example, you might limit the results to the five categories that have the most terms.

**Example**

To practice filtering a simple report, study the Information Governance Dashboard charts Number of Terms per Category and Top 5 Number of Terms per Category. The charts are in Public Folders > Information_Governance_Dashboard > Reports > Information Governance > Charts and Lists > Charts - Categories Ranking Sample.

The Number of Terms per Category chart shows the number of terms for each category in the metadata repository.

![Number of Terms per Category](image)

If the repository contained hundreds of categories, this chart would be unreadable online.

To solve this problem, the Top 5 Number of Terms per Category chart uses ranking and a filter to display only the five categories that have the most terms.
You can open the charts in Cognos Report Studio, examine the filter in the Top 5 chart, and create a similar filter for the Number of Terms per Category chart.

Related reference:

“Data Quality tab of Information Governance Dashboard workspace” on page 20
The data quality charts display success and failure percentages for all runs of data rules. The charts also display the number of data rule exceptions per policy, per information governance rule, and per steward.

“Information Currency tab of Information Governance Dashboard workspace” on page 24
The information currency charts track how recent or out-of-date your data rule runs are. Identifying the oldest runs helps you ensure that your information is current.

“Metrics for Terms tab of Information Governance Dashboard workspace” on page 26
The term metric charts display the number of terms of each status, and the number of terms that have stewards or assigned assets.

“Governance Performance tab of Information Governance Dashboard workspace” on page 17
The governance performance charts display how well you are achieving your data quality targets and how well you implemented and provided stewards for your policies and information governance rules.

**Target thresholds for runs of data rules**

You can indicate the relative levels of success of data rule runs by setting target thresholds for Information Governance Dashboard reports.

When you set target thresholds, green, red, or yellow icons appear in reports on runs of data rules. These icons show whether the passing rate for the runs is satisfactory, unacceptable, or somewhere in between.
You can set the target threshold globally, for runs of all data rules. You can also set target thresholds for individual data rules. Target thresholds that you set for individual data rules override the global thresholds.

For example, in the following Health Summary by Data Rules report, each of the three data rules that are shown has a different icon.

<table>
<thead>
<tr>
<th>Health Summary by Data Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Rule</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td>AdultInRangeString Bank Demographics</td>
</tr>
<tr>
<td>AdultInRangeNumeric Bank Demographics</td>
</tr>
<tr>
<td>AdultInRangeString Bank Demographics</td>
</tr>
</tbody>
</table>

The yellow dash icon indicates that the percentage of runs passed for the data rule in the first row was between satisfactory and unsatisfactory, according to the target that was set. In this case, the target passing percentage was 90 percent, and only 83 percent of the runs passed.

The green check mark icon indicates that the percentage of runs passed for the data rule in the second row is satisfactory. The target passing percentage was 98 percent and 100 percent of the runs passed.

The red X icon indicates that the percentage of runs passed for the data rule in the third row was unsatisfactory. The target passing rate was 98 percent, but only 93 percent of the runs passed.

You can use the icons to get a quick reading of the performance of data rules without having to calculate the difference between target and percentage passed.

In addition to the Health Summary by Data Rules report, the icons are displayed in data quality details reports on policies, information governance rules, and data rules.

**Global target thresholds**

You set global thresholds when you create and customize the configuration tables for Information Governance Dashboard.

You can specify two global values:

**GLOBAL_TARGET_UPPER_THRESHOLD**
- The green check mark icon is displayed for all data rules whose passing rate meets or exceeds the percentage that you specify for the upper threshold. For example, if you specify 90 percent (0.90) for the upper threshold, data rules that have a 90 percent or greater passing rate are marked by a green check mark icon.

**GLOBAL_TARGET_LOWER_THRESHOLD**
- The red X icon is displayed for data rules whose passing rate is less than the percentage that you specify for the lower threshold. For example, if
you specify 80 percent (0.80) for the lower threshold, any data rule with a passing rate of 80 percent or less is flagged with a red X icon.

The yellow dash icon is displayed whenever the passing rates fall between the values that are specified by the upper and lower thresholds. For example, if you specify an upper threshold of 90 percent and a lower threshold of 80 percent, a yellow dash icon is displayed for values from 80 to 89 percent.

By default, the upper threshold is set to 0.98 and the lower threshold is set to 0.94. But you can change the defaults when you create and customize the configuration tables, or at a later date by using the SQL UPDATE command.

The value that you specify for the upper threshold must always be greater than or equal to the value that you specify for the lower threshold.

To display only the green check mark and the red X in your reports, set the upper threshold and the lower threshold to the same percentage. For example, if you specify 85 percent (0.85) for both the upper and lower thresholds, a green check mark is displayed for data rules with passing rates of 85 percent and higher. A red X is displayed for data rules with passing rates less than 85 percent.

**Individual target thresholds**

You set individual target thresholds for data rules in InfoSphere Business Glossary.

You can set values for the following thresholds for individual data rules:

**TARGET_UPPER_THRESHOLD**

The green check mark icon is displayed for all data rules whose passing rate meets or exceeds the percentage that you specify for the upper threshold.

**TARGET_LOWER_THRESHOLD**

The red X icon is displayed for data rules whose passing rate is less than the percentage that you specify for the lower threshold.

The yellow dash icon is displayed whenever the passing rates fall between the values that are specified by the upper and lower thresholds.

The rules for display are the same as the rules described in the previous section on setting global target thresholds.

**Related reference:**

“Data Quality tab of Information Governance Dashboard workspace” on page 20

The data quality charts display success and failure percentages for all runs of data rules. The charts also display the number of data rule exceptions per policy, per information governance rule, and per steward.

“Information Currency tab of Information Governance Dashboard workspace” on page 24

The information currency charts track how recent or out-of-date your data rule runs are. Identifying the oldest runs helps you ensure that your information is current.

“Metrics for Terms tab of Information Governance Dashboard workspace” on page 26

The term metric charts display the number of terms of each status, and the number of terms that have stewards or assigned assets.
The governance performance charts display how well you are achieving your data quality targets and how well you implemented and provided stewards for your policies and information governance rules.

Setting target thresholds for data rules in Information Governance Dashboard
You can set global thresholds or thresholds for particular data rules. The target information is used in reports that show how well your data rules are implemented.

About this task

Global target thresholds are initially set when you create and customize the Information Governance Dashboard configuration tables.

You can update the global threshold values by using an SQL UPDATE statement. You can create individual targets for data rules in InfoSphere Business Glossary. Values are expressed as numerals that represent percentages. For example, 100 percent is represented by 1.0, and 90 percent is represented by 0.90.

Procedure

Set global or individual thresholds.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To update global target thresholds</td>
<td>Issue a SQL UPDATE for the value of GLOBAL_TARGET_UPPER_THRESHOLD or GLOBAL_TARGET_LOWER_THRESHOLD. For example, issue a statement similar to the following statement: UPDATE IGB.SETUP_PARAMETER SET VALUE = '0.95' WHERE PARAMETER = 'GLOBAL_TARGET_UPPER_THRESHOLD'.</td>
</tr>
</tbody>
</table>
| To create individual target thresholds | 1. Log in to InfoSphere Business Glossary with sufficient permissions to update data rules.  
2. Click Browse > Browse All AssetsData Rule.  
3. Click to select a data rule, and click Edit.  
4. Expand the Notes section, and click New.  
5. In the Create New Note window, in the Subject field, enter either TARGET_UPPER_THRESHOLD or TARGET_LOWER_THRESHOLD.  
6. In the Note field, enter a percentage value in numeral form, and click Save. For example, to enter 95 percent, enter 0.95.  
7. Create another note, if necessary, to enter the second threshold value as described in steps e. and f. |
The following graphic shows two threshold values set for a data rule.

![AdultInRangeString]

- **Assigned To Terms (0)**
- **Implements Rules (2)**
  - Required Fields For Custom
  - Restrict Customer Financial

Results

When you run reports on data rules, the global and individual target values that you set are used in reports to display icons that indicate the relative success of runs of the data rules.

**Linking InfoSphere Business Glossary assets to reports in Information Governance Dashboard**

You can create custom attributes for information governance policies and information governance rules that link to your dashboard reports.

**About this task**

Because you manage your information governance metadata in InfoSphere Business Glossary, you might want to link from a policy or an information governance rule to a report in the Information Governance Dashboard.

This procedure describes how to create link from an information governance policy called Customer Information to the Policy Implementation Status report.

These instructions describe how to obtain and customize a report URL in IBM Cognos. If you use a different reporting tool, you must obtain the report URL according to the requirements of the tool.

**Procedure**

1. In the Public Folders navigation area in Cognos Connection, click the **Set Properties** icon to the right of the report name.
2. On the General tab of the Set Properties page, click View the search path, ID and URL.

3. Copy the contents of the Default action URL field and paste the contents into a text editor. The URL is similar to the following URL:

   http://localhost:80/ibmcognos/cgi-bin/cognos.cgi?b_action=cognosViewer&ui.action=run&ui.object=%2fcontent%2fpackage%5b%40name%3d%27Information_Governance_Dashboard%27%5d%2ffolder%5b%40name%3d%27Reports%27%5d%2ffolder%5b%40name%3d%27Information%20Governance%27%5d%2freport%5b%40name%3d%27Policy%20Implementation%20Status%27%5d&ui.name=Policy%20Implementation%20Status&run.outputFormat=&run.prompt=true

4. Open InfoSphere Business Glossary, and on the Glossary tab find and copy the RID of the policy or information governance rule that you want to link to the Cognos report:
   a. Click Rules or Policies to display a list of rules or policies.
   b. Right-click the link to the rule or policy and copy the shortcut or link location.
   c. Paste the link into the text editor. The link looks similar to this link.

      http://myhost.mycompany.com:9080/bg/#dossierView/6662c0f2.8ed29152.19hjrq6dd.ptbhkbo.jumasj.045p3n3ju7aa46b7gg594
      ?bg_req_context={"perspective":"Glossary"}
   d. Delete the text in the link before and including #dossierView/ and delete the text after and including the question-mark (?). The remainder is the RID. In the example above the RID is 6662c0f2.8ed29152.19hjrq6dd.ptbhkbo.jumasj.045p3n3ju7aa46b7gg594.

5. In the text editor, append one of the following strings to the URL that you copied previously.

<table>
<thead>
<tr>
<th>For this type of asset</th>
<th>Append this string</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information governance policy</td>
<td>&amp;run.prompt=false&amp;p_Entry%20Policy%20RID=RID_of_this_asset, where RID_of_this_asset is the RID that you copied.</td>
</tr>
</tbody>
</table>
For this type of asset | Append this string
---|---
Information governance rule | &run.prompt=false&amp;InformationGovernance%20Rule%20RID=RID_of_this_asset, where RID_of_this_asset is the RID that you copied.

6. In the text editor, at the end of the edited URL, append `|view` to the end of the URL and enclose the entire URL in brackets. This suffix indicates that view is the value to display in InfoSphere Business Glossary for the link to the report. The example URL now looks like this:

```
[http://localhost:80/ibmcognos/cgi-bin/cognos.cgi?b_action=cognosViewer&amp;ui.action=run&amp;ui.object=content%2fpackage%2ffolder%2ffolder%2frule%2frule%2fpolicy%2fstatus%2fReport%2fview|view]
```

7. Create the custom attribute:

a. On the Administration tab of InfoSphere Business Glossary, create a custom attribute that applies to information governance policies and information governance rules. Use the same name for the custom attribute as the name of the report that you want to link to.

b. On the Glossary tab of InfoSphere Business Glossary, navigate to the page of the policy or information governance rule and click Edit. The custom attribute appears in the General Information section.

c. Paste the full URL that you created into the field next to the name of the custom attribute, and click Save.

d. Click View to leave the Edit page and display the page for the policy or information governance rule. Next to the name of the custom attribute, the word `view` appears, underlined with an embedded link to the report:
Results

When you browse policies or implementation governance rules in InfoSphere Business Glossary, you can click the link to view the latest report.

Related information:

Troubleshooting: Reports and report data do not refresh after changes

To ensure that Information Governance Dashboard reports are refreshed regularly, you can choose not to use the local cache.

Symptoms
When you change report data, the changes are not reflected in IBM Cognos Connections.

Causes
In IBM Cognos Framework Manager, you can choose to use the local cache to increase performance. By default the Governance Dashboard Model allows use of the local cache. Caching can cause reports to not display the most current data.

Resolving the problem
To resolve the problem, change the settings in Cognos Framework Manager so that you do not allow use of the local cache:

1. In Cognos Framework Manager, open the Governance Dashboard model.
2. From the menu bar, choose Project > Edit Governors.
3. In the Governors window, remove the check mark from Allow usage of local cache, and click OK.
4. Republish the model.

Governance Dashboard model in Cognos Framework Manager

The Governance Dashboard model is the foundation for Information Governance Dashboard. Use the model in Cognos Framework Manager to understand the classes and relationships that contribute to reports.

Installing the Governance Dashboard Model

To work with the model, make it available as a project folder in Cognos Framework Manager.

Before you begin

You must install IBM Cognos Framework Manager version 10.2 or 10.2.1.

You must download the Information Governance Dashboard patch.

Procedure

2. Open Framework Manager.

Note: If you previously installed an earlier version of Information Governance Dashboard, make sure that you select the new Information_Governance_Dashboard folder.

Governance Dashboard model

The model organizes query subjects into the logical components of the metadata model for Information Governance Dashboard.

The Governance Dashboard model uses two layers of abstraction, a physical layer named the PhysicalView and a logical layer named the LogicalView.
PhysicalView

The physical layer defines a structured set of relationships to support reporting at the logical view. All relationships are defined in the physical layer. The physical layer represents the SQL views of the metadata repository. It contains some additional query subjects and copies of query subjects for linkage purposes. The physical layer adds specific relationships to the views, connects them with lookup tables to obtain strings for numeric values, and provides extensions to support certain reports.

The query subjects are organized in a folder structure that represents the following components of the InfoSphere Information Server metadata model.

Common Metadata
The Common Metadata section of the Governance Dashboard Model contains a subset of common metadata that includes database metadata that is imported by bridges or connectors. This metadata describes hosts, databases, schemas, tables, views, stored procedures, and columns. The model also contains metadata on notes, users, and stewardship assignments.

Business Glossary
The Business Glossary section of the model includes metadata that is created in InfoSphere Business Glossary: categories, terms, labels, information governance policies, and information governance rules. The section also includes a view that links information governance rules to the data rules that implement them.

Information Analyzer
The Information Analyzer section of the model includes metadata that is created in InfoSphere Information Analyzer: projects, data rules, data rule sets, data rule definitions, data rule set definitions. The section also contains many views that are necessary to linking analysis objects to other objects.
The physical layer contains two more folders:
- The Global Setup folder provides access to configuration data.
- The Lookup Tables folder provides access to reference data.

**LogicalView**

The logical layer is the only layer that is exposed to reports. The logical layer provides query subjects, computations, and filters as building blocks for reports. The query subjects are grouped into higher level entities that fit reporting purposes. No relationships are included in the logical layer, which abstracts from the underlying execution engine and its implementation details.

In some cases, the queries that underlie the report add logic to these building blocks. Examples of such additional logic are sorting, counting, ranking, and other types of aggregation or computation. When such logic is used across different reports, it is usually encoded in the logical layer of the Framework Manager model.

The logical layer is divided into two domains, information governance and data quality:

**Information Governance**
Corresponds to the information governance domain in the sample reports. The query subjects focus primarily on metadata that is created and
managed in InfoSphere Business Glossary, such as information governance policies, information governance rules, categories, terms, stewards, and related database assets such as governed columns and tables.

**Data Quality**

Corresponds to the data quality domain in the sample reports. The query subjects focus primarily on metadata that is maintained in InfoSphere Information Analyzer, such as data rules, data rule definitions, data rule sets, data rule set definitions, and metrics. The data quality domain also includes database assets such as bound columns.

**Using the same view in different models**

Submodels in the folders Business Glossary and Information Analyzer can seem to have copies of the same entities. For example, there is an IGBUSINESSRULE in the Business Glossary model and an IGBUSINESSRULE_IA in the Information Analyzer model. Both are based on the same view.

The reason for this is that these models serve different purposes. The Information Analyzer model supports the Data Quality domain on the logical layer, which requires each data rule to be connected with a policy. The Business Glossary model, however, can be used to show how many rules actually are connected to policies and how many policies have information governance rules, and so on.

In the Information Analyzer model, each rule is associated with at least one information governance rule and a policy. But in the Business Glossary model some data rules have no counterpart in InfoSphere Business Glossary and some policies do not have information governance rules assigned. The different models serve different reporting purposes and thus are optimized for performance and usability.

**Related reference:**

“SQL views and model schemas for Information Governance Dashboard” on page 4

You can use the SQL views to create your own reports and to understand the sample reports for Information Governance Dashboard. You can use the model schemas to design business intelligence reports or SQL applications.

**Related information:**

[Cognos Workspace User Guide 10.2.0](#)
Appendix A. Product accessibility

You can get information about the accessibility status of IBM products.

The IBM InfoSphere Information Server product modules and user interfaces are not fully accessible. The installation program installs the following product modules and components:

- IBM InfoSphere Blueprint Director
- IBM InfoSphere Discovery
- IBM InfoSphere Metadata Workbench
- IBM InfoSphere Business Glossary
- IBM InfoSphere Business Glossary Anywhere
- IBM InfoSphere Information Analyzer
- IBM InfoSphere QualityStage®
- IBM InfoSphere Information Services Director
- IBM InfoSphere DataStage®
- IBM InfoSphere DataStage and QualityStage Designer
- IBM InfoSphere Data Click
- IBM InfoSphere FastTrack
- IBM InfoSphere Data Replication

For information about the accessibility status of IBM products, see the IBM product accessibility information at [http://www.ibm.com/able/product_accessibility/index.html](http://www.ibm.com/able/product_accessibility/index.html).

Accessible documentation

Accessible documentation for InfoSphere Information Server products is provided in an information center. The information center presents the documentation in XHTML 1.0 format, which is viewable in most web browsers. Because the information center uses XHTML, you can set display preferences in your browser. This also allows you to use screen readers and other assistive technologies to access the documentation.

The documentation that is in the information center is also provided in PDF files, which are not fully accessible.

IBM and accessibility

See the [IBM Human Ability and Accessibility Center](http://www.ibm.com/able) for more information about the commitment that IBM has to accessibility.
Appendix B. Contacting IBM

You can contact IBM for customer support, software services, product information, and general information. You also can provide feedback to IBM about products and documentation.

The following table lists resources for customer support, software services, training, and product and solutions information.

Table 1. IBM resources

<table>
<thead>
<tr>
<th>Resource</th>
<th>Description and location</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBM Support Portal</td>
<td>You can customize support information by choosing the products and the topics that interest you at <a href="http://www.ibm.com/support/entry/portal/Software/Information_Management/InfoSphere_Information_Server">www.ibm.com/support/entry/portal/Software/Information_Management/InfoSphere_Information_Server</a></td>
</tr>
<tr>
<td>Software services</td>
<td>You can find information about software, IT, and business consulting services, on the solutions site at <a href="http://www.ibm.com/businesssolutions/">www.ibm.com/businesssolutions/</a></td>
</tr>
<tr>
<td>My IBM</td>
<td>You can manage links to IBM Web sites and information that meet your specific technical support needs by creating an account on the My IBM site at <a href="http://www.ibm.com/account/">www.ibm.com/account/</a></td>
</tr>
<tr>
<td>Training and certification</td>
<td>You can learn about technical training and education services designed for individuals, companies, and public organizations to acquire, maintain, and optimize their IT skills at <a href="http://www.ibm.com/training">http://www.ibm.com/training</a></td>
</tr>
</tbody>
</table>
Appendix C. Accessing and providing feedback on the product documentation

Documentation is provided in a variety of locations and formats, including in help that is opened directly from the product client interfaces, in a suite-wide information center, and in PDF file books.

The information center is installed as a common service with InfoSphere Information Server information center. The information center contains help for most of the product interfaces, as well as complete documentation for all the product modules in the suite. You can open the information center from the installed product or from a web browser.

Accessing the information center

You can use the following methods to open the installed information center.

- Click the Help link in the upper right of the client interface.

  **Note:** From IBM InfoSphere FastTrack and IBM InfoSphere Information Server Manager, the main Help menu item opens a local help system. Choose Help > Open Info Center to open the full InfoSphere Information Server information center.

- Press the F1 key. The F1 key typically opens the topic that describes the current context of the client interface.

  **Note:** The F1 key does not work in web clients.

- Use a web browser to access the installed information center even when you are not logged in to the product. Enter the following address in a web browser:

  \[http://\text{host}\_name:port\_number/infocenter/topic/com.ibm.swg.im.iis.productization.iisinfsv.home.doc/topics/ic\_homepage\_IS.html\]

  where `host_name` is the name of the services tier computer where the information center is installed, and `port_number` is the port number for InfoSphere Information Server. The default port number is 9080. For example, on a Microsoft® Windows® Server computer named server1, that uses the default port, the web address is in the following format:

  \[http://server1:9080/infocenter/topic/com.ibm.swg.im.iis.productization.iisinfsv.home.doc/topics/ic\_homepage\_IS.html\]

A subset of the information center is also available on the IBM website and periodically refreshed at \[http://pic.dhe.ibm.com/infocenter/iisinfsv/v9r1/index.jsp\]. This information center is the most up-to-date version and might include corrections, provided as comments.

Obtaining PDF and hardcopy documentation

- The PDF file books are available online and can be accessed from this support document: \[https://www.ibm.com/support/docview.wss?uid=swg27008803\&wv=1\]
• You can also order IBM publications in hardcopy format online or through your local IBM representative. To order publications online, go to the IBM Publications Center at [http://www.ibm.com/e-business/linkweb/publications/servlet/pbi.wss](http://www.ibm.com/e-business/linkweb/publications/servlet/pbi.wss).

**Providing comments on the documentation**

Your feedback helps IBM to provide quality information. You can use any of the following methods to provide comments:

• To provide a comment about the information center that is hosted on the IBM website, sign in and add a comment. Comments submitted this way are viewable by the public. See for more information.

• To send a comment about the information to IBM that is not viewable by anyone else, click the **Feedback** link on the top right side of any topic in the information center. You can do this from an information center that is installed with InfoSphere Information Server or from the information center that is available on the IBM website.

• **Send your comments by using the online readers’ comment form at [www.ibm.com/software/awdtools/rcf/](http://www.ibm.com/software/awdtools/rcf/)**

• Send your comments by e-mail to comments@us.ibm.com. Include the name of the product, the version number of the product, and the name and part number of the information (if applicable). If you are commenting on specific text, include the location of the text (for example, a title, a table number, or a page number).
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<table>
<thead>
<tr>
<th>Product module</th>
<th>Component or feature</th>
<th>Type of cookie that is used</th>
<th>Collect this data</th>
<th>Purpose of data</th>
<th>Disabling the cookies</th>
</tr>
</thead>
</table>
| Any (part of InfoSphere Information Server installation) | InfoSphere Information Server web console | • Session  
• Persistent | User name | • Session management  
• Authentication | Cannot be disabled |
| Any (part of InfoSphere Information Server installation) | InfoSphere Metadata Asset Manager | • Session  
• Persistent | No personally identifiable information | • Session management  
• Authentication  
• Enhanced user usability  
• Single sign-on configuration | Cannot be disabled |
| InfoSphere DataStage | Big Data File stage | • Session  
• Persistent | • User name  
• Digital signature  
• Session ID | • Session management  
• Authentication  
• Single sign-on configuration | Cannot be disabled |
Table 2. Use of cookies by InfoSphere Information Server products and components (continued)

<table>
<thead>
<tr>
<th>Product module</th>
<th>Component or feature</th>
<th>Type of cookie that is used</th>
<th>Collect this data</th>
<th>Purpose of data</th>
<th>Disabling the cookies</th>
</tr>
</thead>
</table>
| InfoSphere DataStage | XML stage | Session | Internal identifiers | • Session management  
• Authentication | Cannot be disabled |
| InfoSphere DataStage | IBM InfoSphere DataStage and QualityStage Operations Console | Session | No personally identifiable information | • Session management  
• Authentication | Cannot be disabled |
| InfoSphere Data Quality Console | | Session | No personally identifiable information | • Session management  
• Authentication  
• Single sign-on configuration | Cannot be disabled |
| Information Governance Catalog | InfoSphere Blueprint Director, InfoSphere Business Glossary, InfoSphere Metadata Workbench | • Session  
• Persistent | • Internal identifiers  
• State of the tree | • Session management  
• Authentication  
• Enhanced user usability  
• Single sign-on configuration | Cannot be disabled |
| InfoSphere Information Analyzer | Data Rules stage in the InfoSphere DataStage and QualityStage Designer client | Session | Session ID | Session management | Cannot be disabled |

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