

Configuring the EDG Governance Model

Customizing Governance Roles (for use in Workflow Templates)

- Pre-built roles can be disabled
- New roles for your organization can be created
- Process overview:
 - 1.** Create a new ontology in EDG
 - 2.** Include in it: “EDG Schema - Platform Governance Assets”
 - 3.** To create a new role:
 - Navigate to the Stewardship class and add a relationship using the newly created property
 - Create a new property of type Workflow Property – using OWL/RDF Properties tab
 - To disable existing role:
 - Select the Stewardship class and deactivate relationship shapes for roles you don’t need
 - 4.** Include the ontology in the Governance Model

Create a New Ontology to contain customizations to the pre-defined EDG Governance Assets

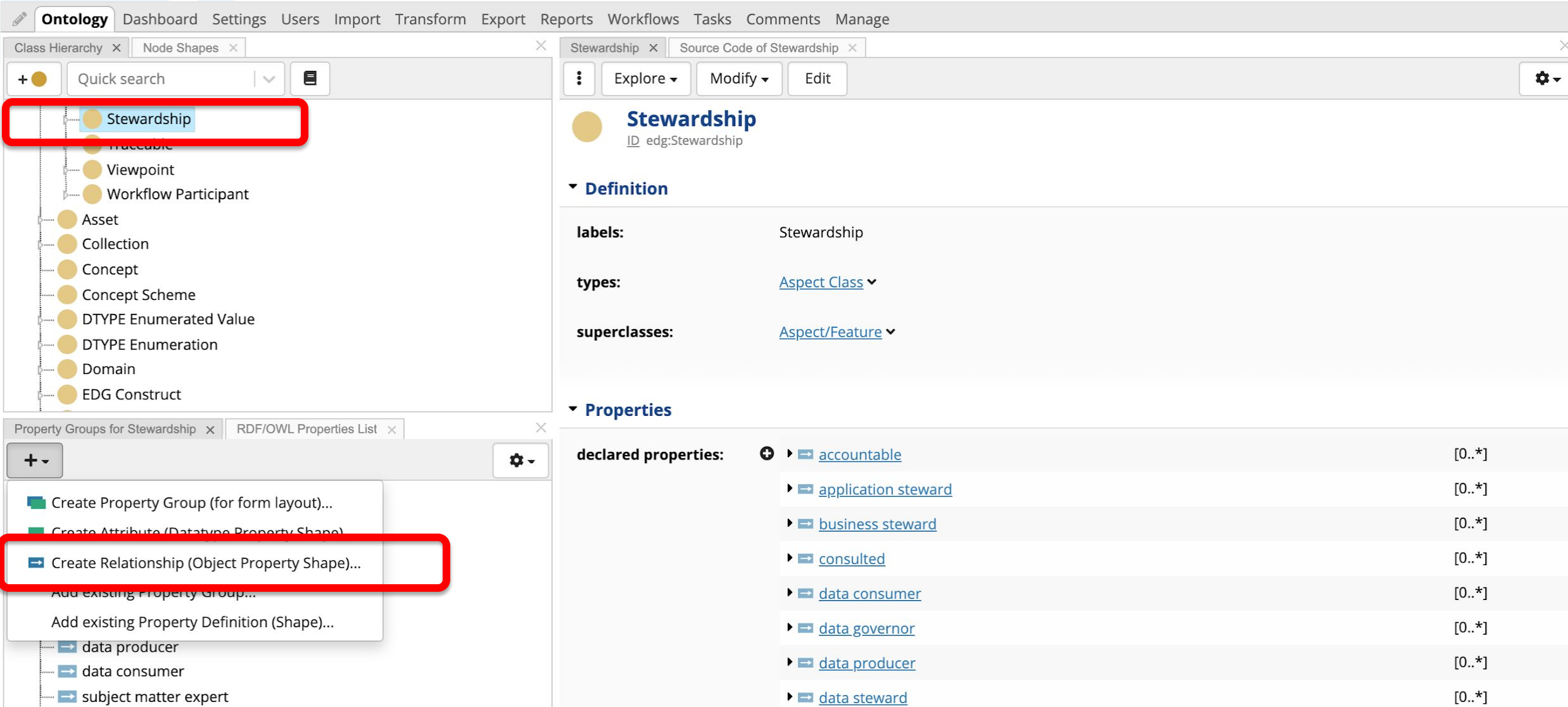
Edit Includes for: Governance Extension ⓘ

The includes process has changed. Select/de-select collections then click the **Next** button to continue the process, follow the on screen prompts.
Note: the wizard must be completed or selections will not be applied.

Go to Settings > Includes to include EDG Shapes for Platform Governance Assets

Collection Name	Collection Type
<input type="text" value="Governance"/>	<input type="text"/>
<input checked="" type="checkbox"/> EDG SCHEMA - Platform Governance Assets	Other
<input type="checkbox"/> EDG Schema - Governance Methodology	Other
<input type="checkbox"/> Governance Model	EDG Platform Asset Collection

Navigate to the Stewardship class and add a Relationship



The screenshot shows the TopQuadrant ontology editor interface. The main window is titled "Ontology" and contains several panes:

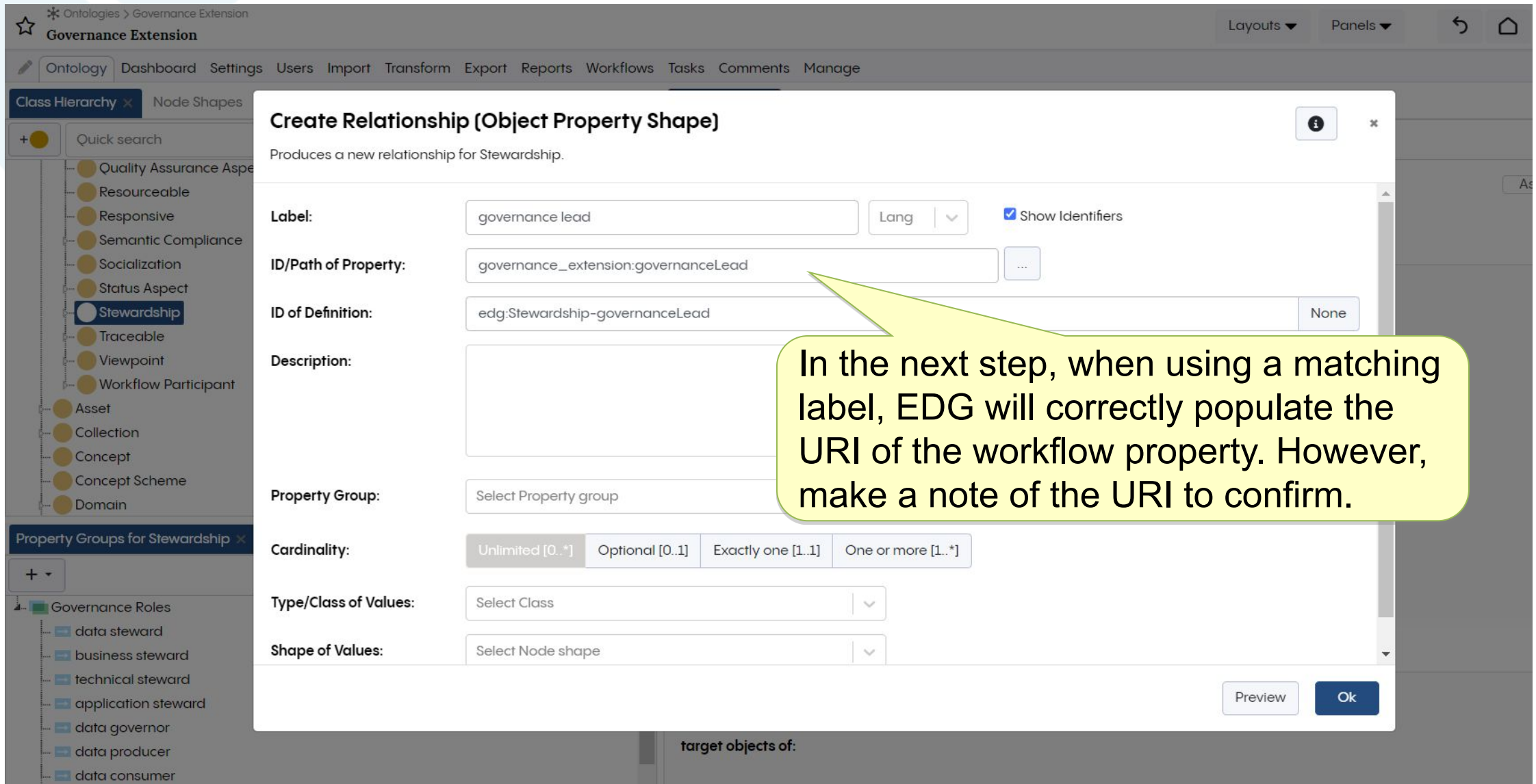
- Class Hierarchy:** A tree view on the left showing the hierarchy of classes. The "Stewardship" class is highlighted with a red box.
- Property Groups for Stewardship:** A pane below the class hierarchy showing a list of property groups. The "Create Relationship (Object Property Shape)..." option is highlighted with a red box.
- Stewardship Class Details:** A pane on the right showing the details for the "Stewardship" class. It includes a definition, labels, types, superclasses, and a list of declared properties.

The "Stewardship" class details pane shows the following information:

- Definition:** Stewardship
- labels:** Stewardship
- types:** Aspect Class
- superclasses:** Aspect/Feature
- declared properties:** A list of properties with their cardinalities:

Property	Cardinality
accountable	[0..*]
application steward	[0..*]
business steward	[0..*]
consulted	[0..*]
data consumer	[0..*]
data governor	[0..*]
data producer	[0..*]
data steward	[0..*]

Note the generated URI for the property



Create Relationship (Object Property Shape)

Produces a new relationship for Stewardship.

Label: Lang Show Identifiers

ID/Path of Property:

ID of Definition:

Description:

Property Group:

Cardinality:

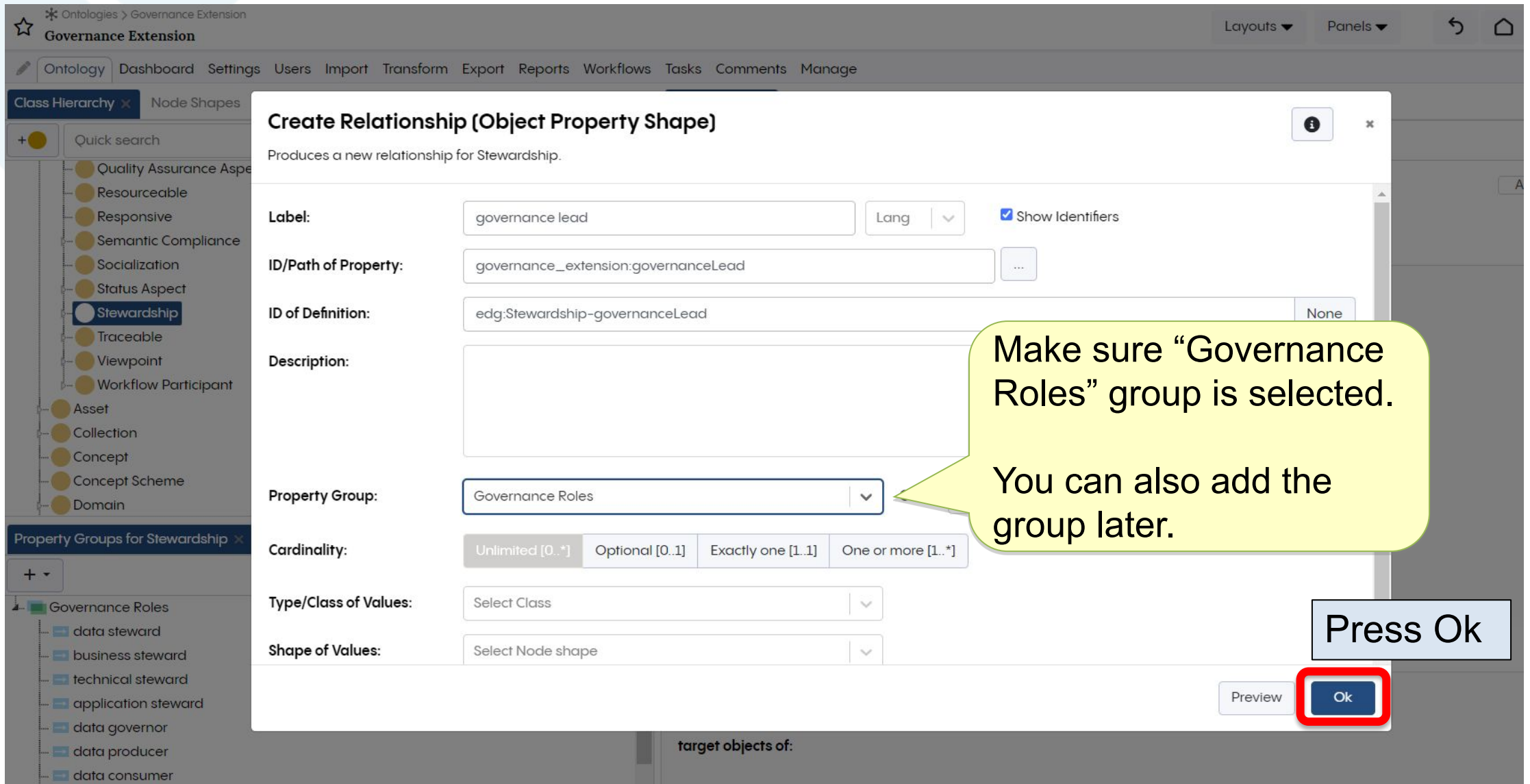
Type/Class of Values:

Shape of Values:

target objects of:

In the next step, when using a matching label, EDG will correctly populate the URI of the workflow property. However, make a note of the URI to confirm.

You do not need to set any constraints



Create Relationship (Object Property Shape)
Produces a new relationship for Stewardship.

Label: Show Identifiers

ID/Path of Property:

ID of Definition:

Description:

Property Group:

Cardinality: Unlimited [0..*] Optional [0..1] Exactly one [1..1] One or more [1..*]

Type/Class of Values:

Shape of Values:

target objects of:

Make sure "Governance Roles" group is selected.
You can also add the group later.

Press Ok

Edit Relationship after it is created

edg:Stewardship-governanceLead x Source Code of edg:Stewardship-governanceLead x

Explore Modify Cancel Preview Save Changes

Definition

name: governance lead

description:

property path: [governance_ext:governanceLead](#)

GraphQL field name:

deactivated:

Display

group: Governance Roles

order: -59

viewer: Workflow participant viewer

editor: Workflow participant editor

read only:

hidden:

Select “workflow participant viewer” and “workflow participant editor”.

This is needed to enable assignment of users for the role

New Stewardship Relationship Defined

Ontology Dashboard Settings Users Import Transform Export Reports Workflows Tasks Comments Manage

Class Hierarchy x Node Shapes x

Quick search

- Resourceable
- Responsive
- Socialization
- Software Executable
- Status Aspect
- Stewardship**
- Traceable
- Viewpoint
- Workflow Participant
- Asset
- Collection
- Concept

Property Groups for Stewardship x

- Governance Roles
 - data steward
 - business steward
 - technical steward
 - application steward
 - data governor
 - governance lead**
 - data producer
 - data consumer


edg:Stewardship-governanceLead x Source Code of edg:Stewardship-governanceLead x

Explore Modify Edit

edg:Stewardship-governanceLead
ID edg:Stewardship-governanceLead

Definition

name: governance lead

property path:  [governance](#) [ext:governanceLead](#)

Display

group: [Governance Roles](#) v

order: -59

viewer: [Workflow participant viewer](#) v

editor: [Workflow participant editor](#) v

Type of Values

node kind: [IRI](#) v

Note that your value for the “order” will be different from shown here.

You may drag and drop the relationship in the Property Groups panel to change the order, or edit it on the form or even leave it blank.

Create the workflow property

The screenshot shows the TopQuadrant interface with the 'Panels' dropdown menu open. The 'RDF/OWL Property List' panel is highlighted in the menu. A yellow callout bubble points to this panel with the text 'Add RDF/OWL Property List panel'. A red arrow points from the panel in the menu to a table titled 'RDF/OWL Properties List' in the main workspace. Another yellow callout bubble points to the table with the text 'Drag and drop'. A grey callout bubble points to the table with the text 'You can sort by Type to see the workflow properties'. The table contains the following data:

Property	Type
business steward	Workflow property
technical steward	Workflow property
application steward	Workflow property
informed	Workflow property
data steward	Workflow property
responsible	Workflow property
data producer	Workflow property
accountable	Workflow property

EDG doesn't automatically create a property definition for property shapes but we require it for custom governance roles:

- In the Editor, add RDF/OWL Property List panel to see workflow properties

Create a new Workflow property

Click New

Property Groups **RDF/OWL Properties List** x

+ New Free Text 669 rows

Property	Type
business steward	Workflow property
technical steward	Workflow property
application steward	Workflow property
informed	Workflow property
data steward	Workflow property
responsible	Workflow property
data producer	Workflow property
accountable	Workflow property

Type the name of the new role. Use the same label as previous and make sure the URI matches

Create Workflow Property

This dialog produces a new Workflow Property.

Label: *

governance lead

Lang

ID: *

governance_model_extension:governanceLead

Type:

- ObjectProperty
- OntologyProperty
- Part of property
- Permission governance role property
- UI property
- Workflow property

Select Workflow property as the type

abbreviation: *

GL

Enter abbreviation

Preview

Ok

Describe Responsibilities of the Role

governance lead ×
Source Code of governance lead ×
×

⋮
Explore ▾
Modify ▾
Cancel
Preview
Save Changes
⚙️ ▾

governance lead

ID governance_ext:governanceLead

▾ **Definition**

labels: + ▾ -

comments: +

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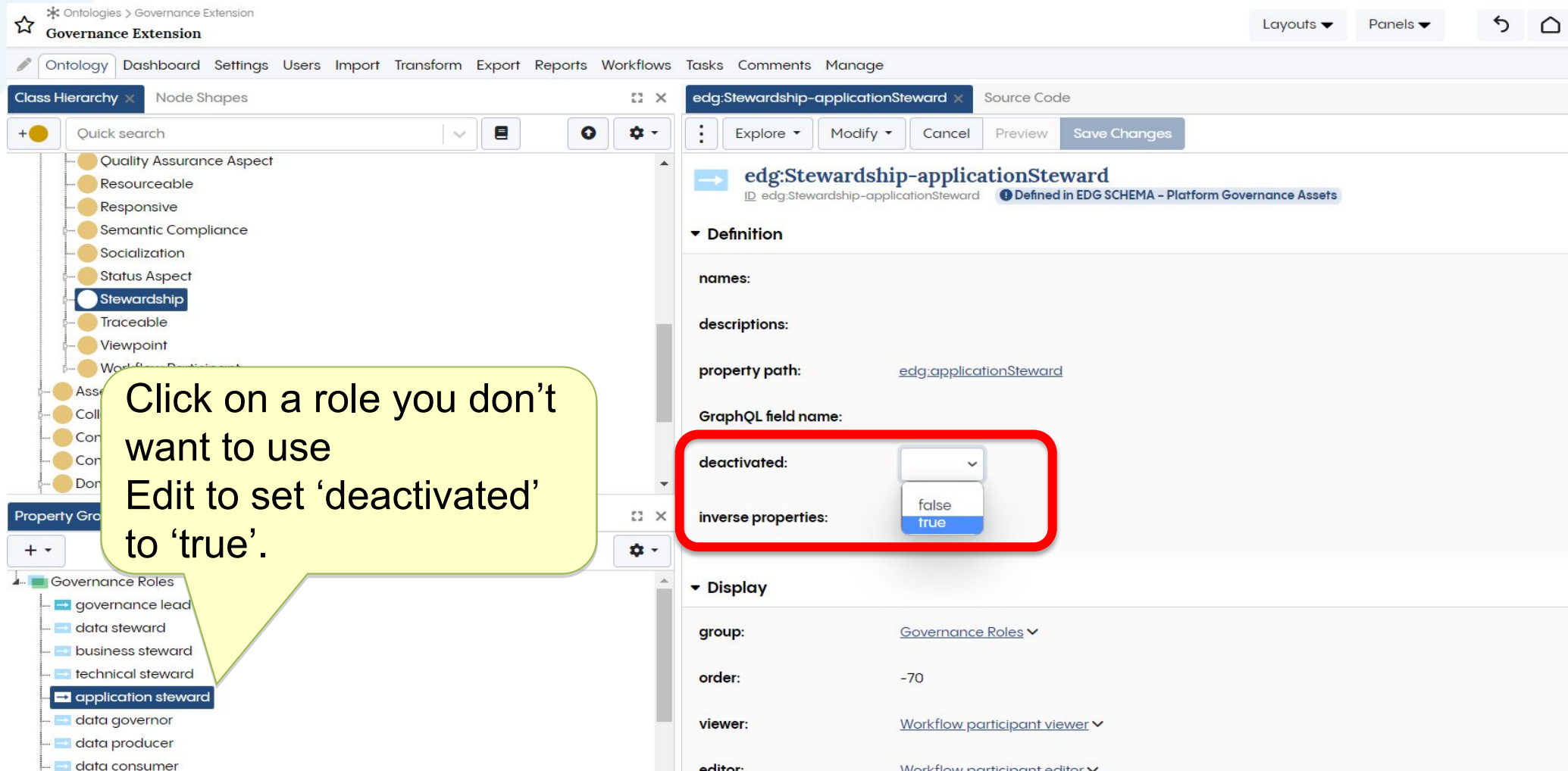
Enter role responsibility description here

In the form, click on Edit and describe role responsibilities in the comments field.

This is optional, but is recommended as a best practice.

Disabling Existing Governance Roles

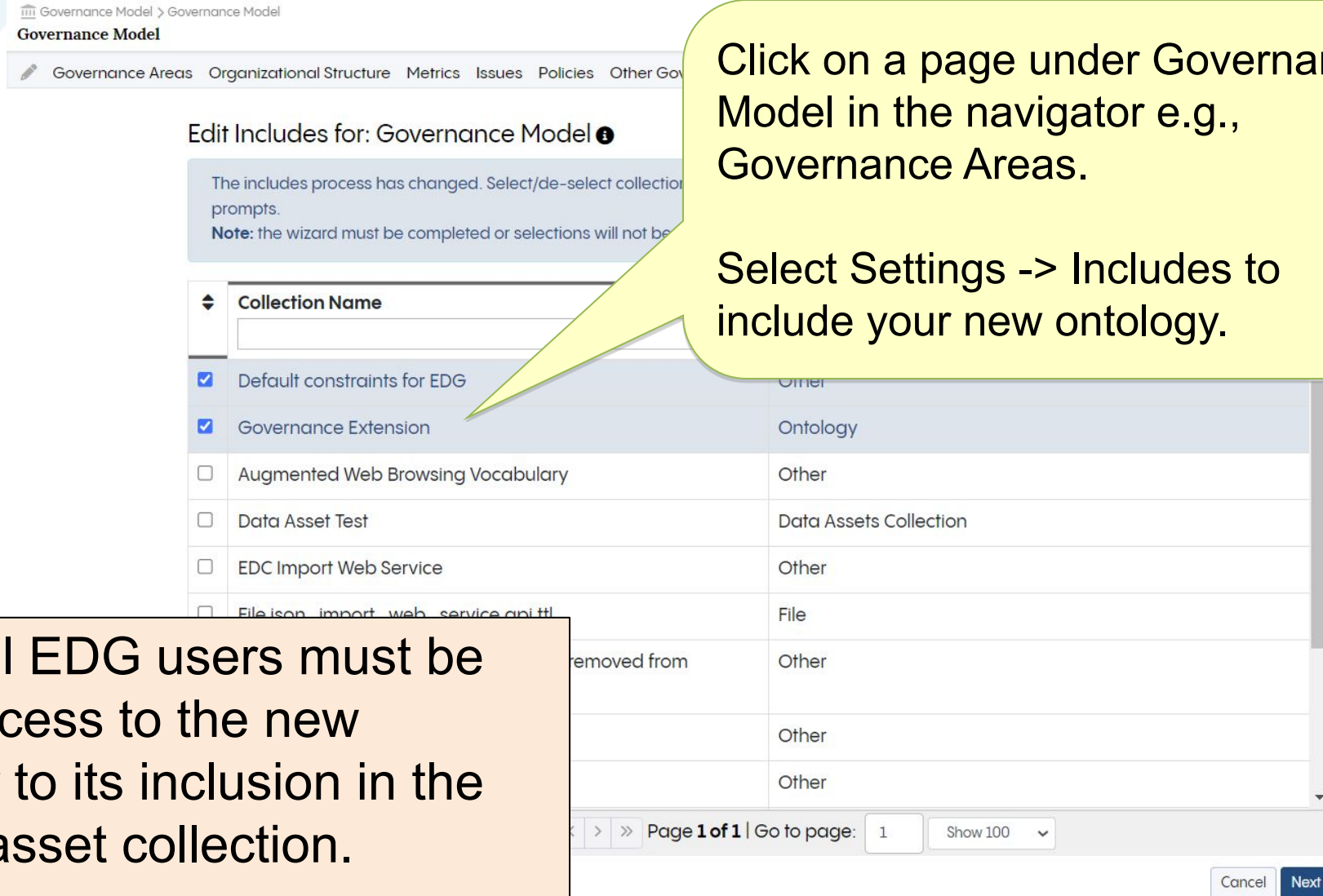
To remove any of the Roles, deactivate the Stewardship shapes



The screenshot shows the TopQuadrant interface for editing the 'edg:Stewardship-applicationSteward' role. The left sidebar displays the 'Class Hierarchy' and 'Property Group' for 'Governance Roles'. The 'Stewardship' role is selected in the class hierarchy, and the 'application steward' role is selected in the property group. The main panel shows the configuration for the 'edg:Stewardship-applicationSteward' role, including its definition and display settings. A red box highlights the 'deactivated' dropdown menu, which is currently set to 'true'. A yellow callout box contains the following text:

Click on a role you don't want to use
Edit to set 'deactivated' to 'true'.

Include your new Ontology in the Governance Operational Model



Click on a page under Governance Model in the navigator e.g., Governance Areas.

Select Settings -> Includes to include your new ontology.

Important: All EDG users must be given read access to the new ontology prior to its inclusion in the Governance asset collection.

Include your new Ontology in the Governance Operational Model

Edit Includes for: Governance Model ⓘ

Permission issues have been detected for 1 include candidates. Please address each issues by selecting the desired action to continue. When all issues have been addressed click **Confirm**.

Note: the wizard must be completed or selections will not be applied.

The following imports require additional action:

Governance Extension

There are one or more parties that may lose access to **Governance Model** if **Governance Model** is included. As the requestor you can decided how to proceed.

- Request access for the impacted parties.
- Continue with the inclusion and ignore the permission issues. If permissions are currently managed via Subject Areas choose this option. Make sure to include Governance Extension in a subject area where all users of the current graph will have access, this wizard does not modify Subject Areas.

Cancel Back **Next**

Additional action:

Click "Next"

Accept EDG suggestion in Governance Extension Ontology (under users)

☆ Ontologies > Governance Extension Under development

Governance Extension

Ontology Dashboard Settings **Users** Import Transform Export Reports Workflows Tasks Comments Manage

Permission Requests

Permission Request	Requested By	Actions
admin1 is requesting the viewer role for ANY_ROLE.	admin1	5/11/23, 9:59:31 AM ...

Click here to accept request

Governance Extension Permissions

Defines permission profiles for individual users, groups of users (security roles) or organizations. Users with the Viewers profile have read-only access. They can make comments, run exports and reports and, unless their governance role disallows it, start new workflows. Users with the Editors permission profile can also make changes to the content and update some of the collection's metadata. Users with the Managers permission profile can also modify permission profiles and governance roles, and can change other advanced settings for the collection by Manage tab.

viewer: [Security Role ANY_ROLE](#)

manager: [admin1](#)

Now any role can view new governance role

EDIT

Now, your changes are part of the Governance Model

Governance Model > Governance Model

Governance Model

Governance Areas Organizational Structure Metrics Issues Policies Other Governance Assets Dashboard Settings Users Import Transform Export Reports Workflows

Manage Your Governance Areas and Roles

Organize your asset collections into **business areas** and **data subject areas**. Enable **governance roles**

Add Business Sub-Area Add Data Subject Sub-Area

Expand All Quick search

Business & Data Subject Areas

- Test Business Area

Add governance role...

- Add governance role...
- Governance Lead (GL)**
- Data Steward (DS)
- Business Steward (BS)
- Technical Steward (TS)
- Application Steward (AS)
- Data Governor (DG)
- Data Producer (DP)
- Data Consumer (DC)
- Subject Matter Expert (SME)
- Responsible (R)
- Accountable (A)
- Consulted (C)
- Informed (I)

You will see your new role.

If you deactivated any roles, you will no longer see them.

Include all assets included in this Subject Area in the index for Search the EDG

Asset Collections

Asset collections are associated with this business area.

Create new Choose type... in this business area

Add Existing Choose asset collection... in this business area



Landing Page Settings

Landing Page Gadgets

Server Administration > EDG Configuration Parameters

Landing Page Settings

Active	Landing Page Gadget
<input checked="" type="checkbox"/>	System Announcements
<input checked="" type="checkbox"/>	Workflow Summary
<input checked="" type="checkbox"/>	My Tasks
<input type="checkbox"/>	What's Happening?
<input checked="" type="checkbox"/>	Recently Viewed Collections
<input checked="" type="checkbox"/>	My Governance Roles
<input checked="" type="checkbox"/>	Asset Collections Summary

Welcome to Topbraid EDG

EDG Upgrade this Weekend

Please be advised that this EDG server will be offline for approximately 30 minutes at 2AM this Saturday while an upgrade to the latest version is being installed.

TopBraid Enterprise Data Governance™

TopBraid EDG™ is an agile data governance solution for today's dynamic enterprises. With EDG, you can choose one or combine two or more data governance packages to support a

Workflow Summary

There are **0** workflows requiring your attention, click [here](#) to review.

My Tasks

You have no tasks

Search the EDG

No collections have been added to search.



Recently Viewed Collections

[Governance Model](#)

[Country Codes](#)

[Geography Taxonomy](#)

[Enterprise Ontology Example v1.1](#)

[SEC Glossary - Appendix C](#)

My Governance Roles

You currently have no assigned role in governing any subject areas, business areas, or asset collections. [Manage Governance Areas](#)

Asset Collections Summary

Summary includes all collections, availability is dependent upon user permissions.

2 - Glossaries	1 - Lineage Models
0 - Requirements ...	2 - Taxonomies
4 - Data Assets	4 - Reference Data...
0 - Big Data Assets	2 - Data Graphs
0 - Enumerations	5 - Ontologies
1 - Datatypes	0 - Corpora
0 - Technical Assets	1 - Content Tag Sets
0 - Enterprise Assets	1 - Crosswalks



Working with Policies & Issues

Working with Policies & Issues

Governance Model > Policies > New

Create Data Retention Policy

This dialog produces a new Data Retention Policy.



Label:

Acme's 2021 Data Retention Policy

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ID:

urn:x-tb-governance:Acme's2021DataRetentionPolicy

Type:



- Enterprise Assets
- Requirements Assets
- Technical Assets
- Big Data Assets
- Lineage Models

Governance

- Governance Areas
- Organizational Structure
- Metrics
- Issues
- Policies**
- Other Governance Ass...

Preview

Ok

- TopBraid EDG lets you capture policies relevant to the data governance.
- Can be connected to other Governance assets.

Working with Policies & Issues

[Governance Areas](#)
[Organizational Structure](#)
[Metrics](#)
[Dashboards](#)
[Issues](#)
[Policies](#)
[Other Governance Assets](#)
[Dashboard](#)
[Settings](#)
[Users](#)
[Import](#)
[Transform](#)
[Export](#)
[More...](#)

Policy Search Class Hierarchy

2 rows

Policy
<input type="checkbox"/> Acme's 2020 Data Retention Policy
<input type="checkbox"/> Acme's 2021 Data Retention Policy

Acme's 2021 Data Retention Policy
URI `urn:x-tb-governance:Acme's2021DataRetentionPolicy`

Identifiers

type: [Data Retention Policy](#)

label: Acme's 2021 Data Retention Policy

Status

effective start date: 2021-01-01

supercedes: [Acme's 2020 Data Retention Policy](#)

Documentation

description: **Personal data we collect**

Acme collects data from you, through our interactions with you and through our products. You provide some of this data directly, and we get some of it by collecting data about your interactions, use, and experiences with our products. The data we collect depends on the context of your

Working with Policies & Issues

Some GDPR compliance tracking support built in.

▼ Compliance

compliance status:

Select Compliance Status



applicable policy requirement:



Select Policy Requirement



assurance of policy compliance:



Select Policy Compliance



compliance indicator:



Select Compliance Indicator



normative reference:



Select Document



applicable regulation(s):



Select Regulations Document



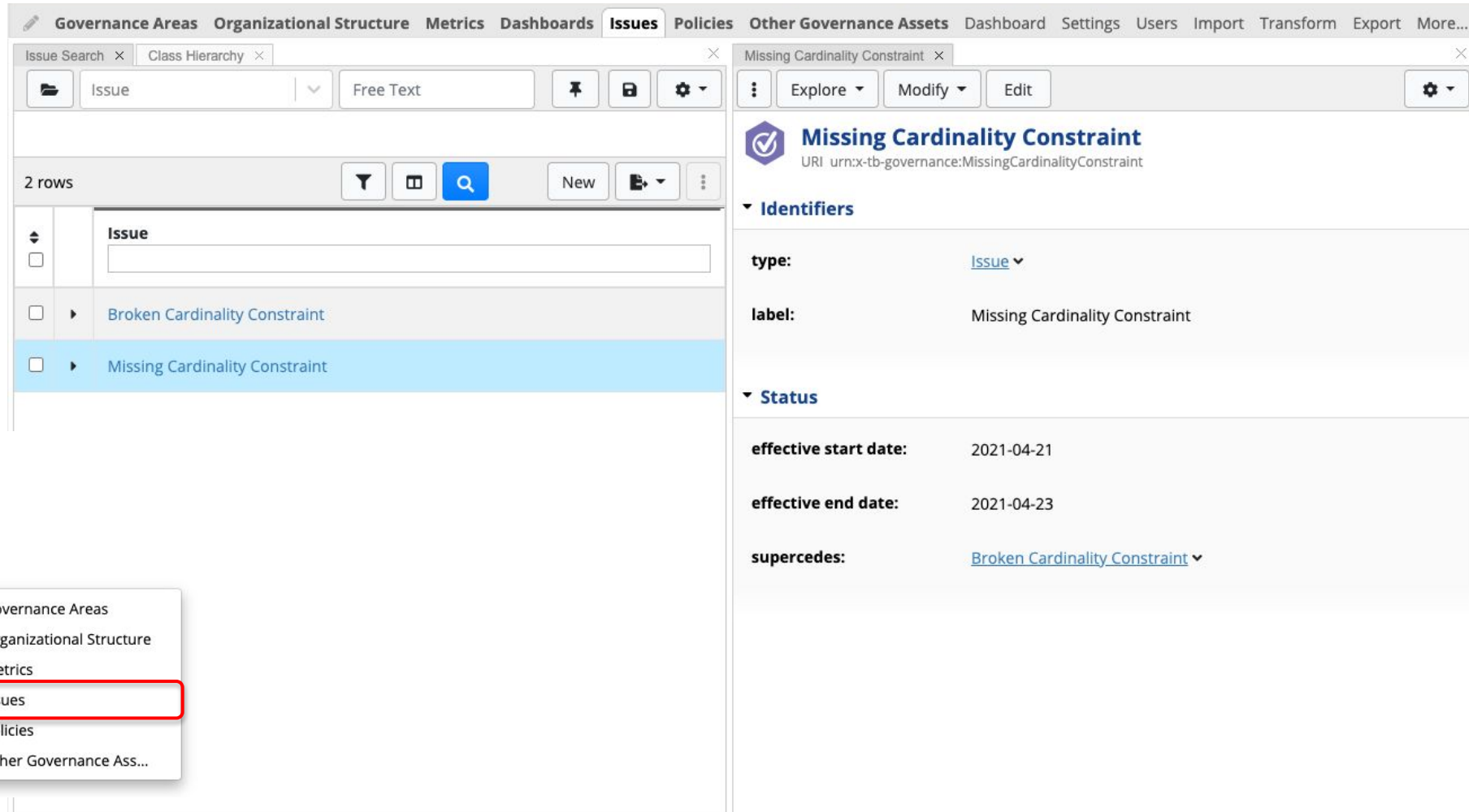
sub-policies:



Select Policy



Governance Model > Issues



The screenshot displays the 'Issues' section of the TopQuadrant Governance Model. The navigation menu on the left includes 'Enterprise Assets', 'Requirements Assets', 'Technical Assets', 'Big Data Assets', 'Lineage Models', and 'Governance'. The 'Governance' menu is expanded, showing 'Governance Areas', 'Organizational Structure', 'Metrics', 'Issues' (highlighted with a red box), 'Policies', and 'Other Governance Ass...'. The main table shows two rows of issues: 'Broken Cardinality Constraint' and 'Missing Cardinality Constraint'. The 'Missing Cardinality Constraint' issue is selected, and its details are shown on the right. The details include the issue type, label, effective start and end dates, and the issue it supersedes.

Issue
Broken Cardinality Constraint
Missing Cardinality Constraint

Missing Cardinality Constraint
URI: urn:x-tb-governance:MissingCardinalityConstraint

Identifiers

- type: [Issue](#)
- label: Missing Cardinality Constraint

Status

- effective start date: 2021-04-21
- effective end date: 2021-04-23
- supersedes: [Broken Cardinality Constraint](#)

Missing Cardinality Constraint x

Explore Modify Cancel Preview Save Changes

Missing Cardinality Constraint
URI urn:x-tb-governance:MissingCardinalityConstraint

Identifiers

type: Issue

label: Missing Cardinality Constraint

id:

alternative label: Lang

asset name:

acronym: Lang

identifier: Lang

tag: Lang

Status

status: Select Asset Status

effective start date: Now 2021-04-21

effective end date: Now 2021-04-23

superseded by: Select Asset

supersedes: Broken Cardinality Constraint

issue(s): Select Issue

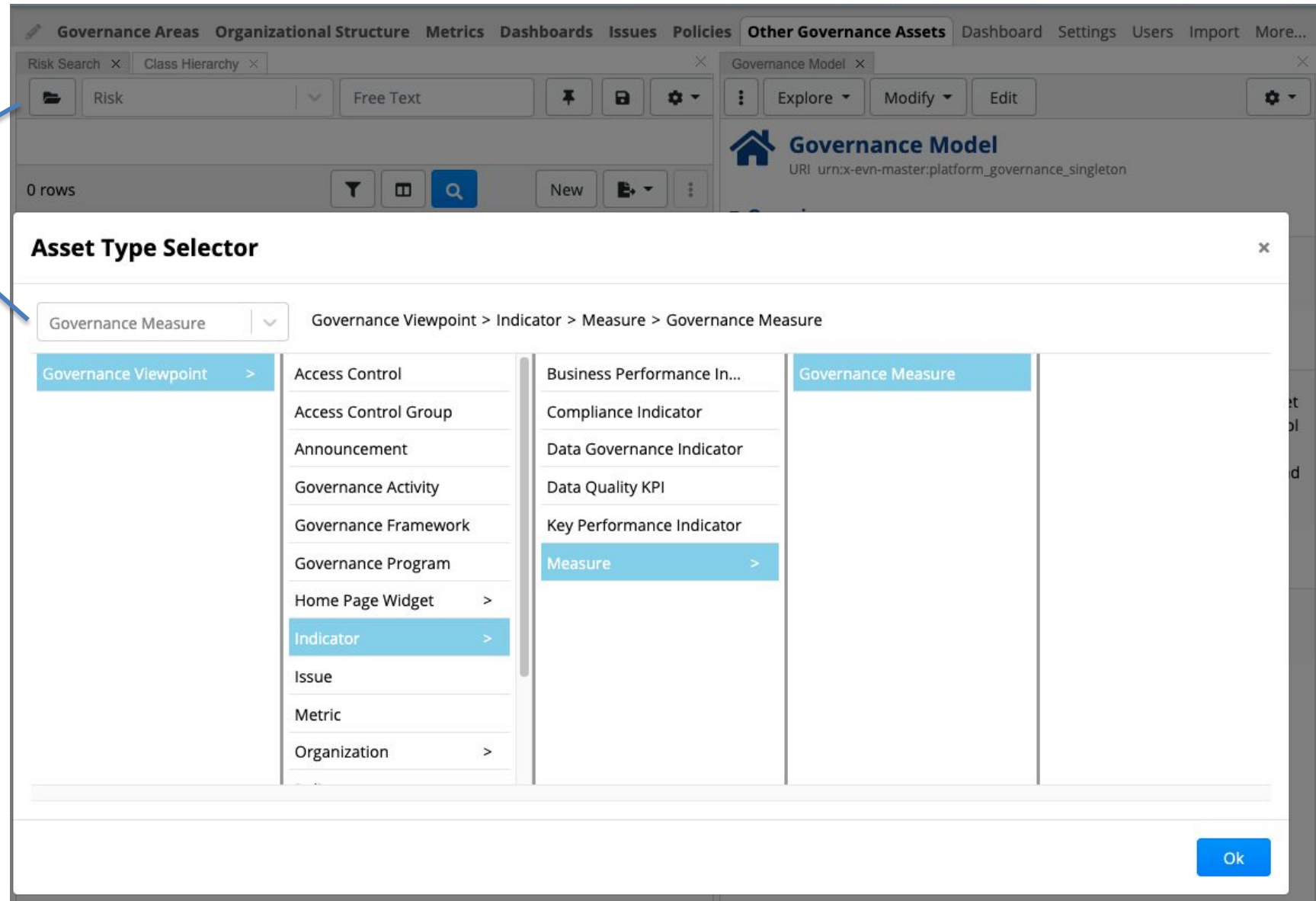
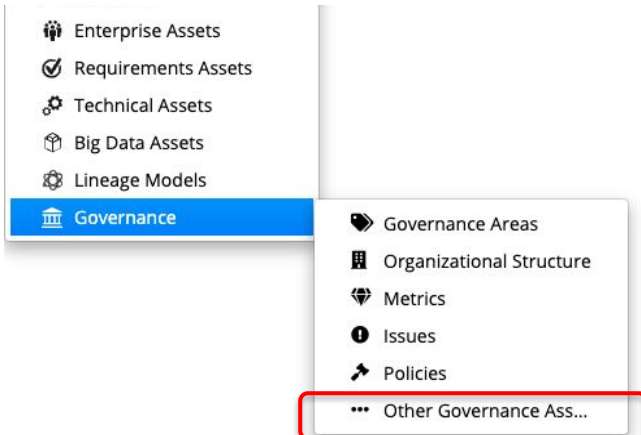
Working with Issues

- Intended to track issues about the Governance Model.
- Supports tracking basic information about an issue.
- Does not integrate with external systems (like Jira).
- Apply your own status vocabulary.
- Does not associate a user name -use *Tasks instead*.

Other Governance Assets

Browse with the
folder icon.

Come here to find
everything else.

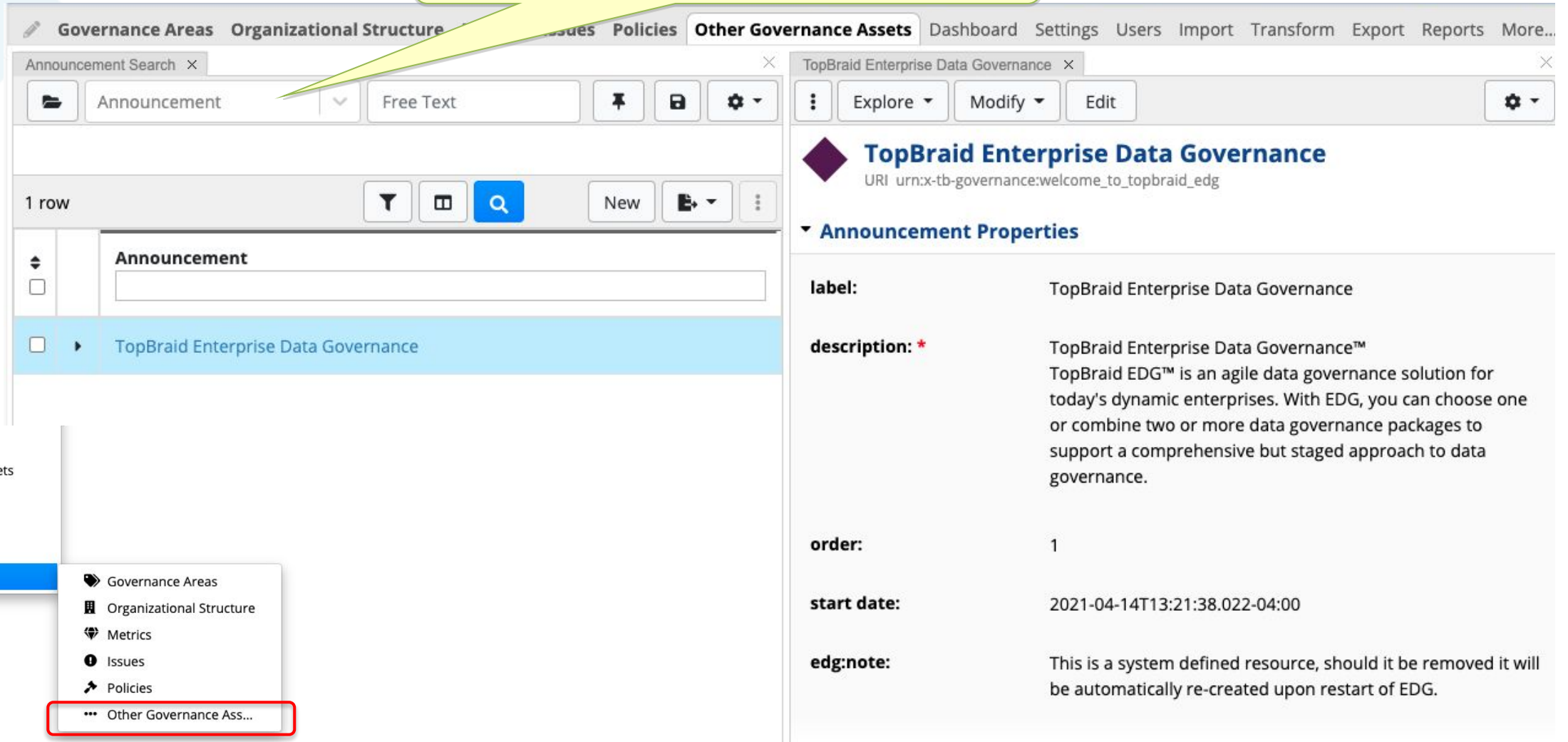


The screenshot shows the 'Other Governance Assets' interface. At the top, there are tabs for 'Risk Search', 'Class Hierarchy', and 'Governance Model'. Below these are search and filter controls. The main content area displays the 'Asset Type Selector' dialog, which is currently set to 'Governance Measure'. The dialog shows a breadcrumb path: 'Governance Viewpoint > Indicator > Measure > Governance Measure'. A list of asset types is shown, with 'Indicator' and 'Measure' highlighted. The 'Measure' item is further expanded to show sub-items: 'Business Performance In...', 'Compliance Indicator', 'Data Governance Indicator', 'Data Quality KPI', and 'Key Performance Indicator'. An 'OK' button is visible at the bottom right of the dialog.

Creating Announcements

Creating Announcements

Select the "Announcement" class.



The screenshot displays the TopBraid Enterprise Data Governance interface. The main window is titled "Announcement Search" and shows a search bar with "Announcement" selected in a dropdown menu. Below the search bar, a table lists one row with the class name "Announcement". A sidebar on the left shows a navigation menu with "Other Governance Ass..." highlighted in a red box. The right-hand pane displays the "Announcement Properties" for the selected class, including label, description, order, start date, and edg:note.

Property	Value
label:	TopBraid Enterprise Data Governance
description: *	TopBraid Enterprise Data Governance™ TopBraid EDG™ is an agile data governance solution for today's dynamic enterprises. With EDG, you can choose one or combine two or more data governance packages to support a comprehensive but staged approach to data governance.
order:	1
start date:	2021-04-14T13:21:38.022-04:00
edg:note:	This is a system defined resource, should it be removed it will be automatically re-created upon restart of EDG.

Creating Announcements

Create Announcement

This dialog produces a new Announcement.

Label:

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ID:

description:

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 ▾  ▾ |          

Lang | ▾

EDG Upgrade this Weekend

Please be advised that this EDG server will be offline for approximately 30 minutes at 2AM this Saturday while an upgrade to the latest version is being installed.

The description is required.

Preview

Ok

Creating Announcements

EDG Upgrade this Weekend ×

Explore ▾ Modify ▾ Cancel Preview Save Changes ⚙ ▾

EDG Upgrade this Weekend
URI urn:x-tb-governance:EDGUpgradeThisWeekend

▼ **Announcement Properties**

label: ▾ ⌵

description: *

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EDG Upgrade this Weekend

Please be advised that this EDG server will be offline for approximately 30 minutes at 2AM this Saturday while an upgrade to the latest version is being installed.

Lang ▾ ▾ ⌵

order: ⌵

start date: ▾ ⌵

end date: ▾ ⌵

“0” makes this the first announcement.

Creating Announcements

Welcome to Topbraid EDG

EDG Upgrade this Weekend

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My Tasks





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Search the EDG

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Recently Viewed Collections









-  [Governance Model](#)
-  [Country Codes](#)
-  [Geography Taxonomy](#)
-  [Enterprise Ontology Example v1.1](#)
-  [SEC Glossary - Appendix C](#)

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-  1 - [Datatypes](#)
-  0 - [Technical Assets](#)
-  0 - [Enterprise Assets](#)
-  1 - [Lineage Models](#)
-  2 - [Taxonomies](#)
-  4 - [Reference Data...](#)
-  2 - [Data Graphs](#)
-  5 - [Ontologies](#)
-  0 - [Corpora](#)
-  1 - [Content Tag Sets](#)
-  1 - [Crosswalks](#)



What we covered

- Creating Custom Governance Roles
- Disabling Existing Governance Roles
- Landing Page Settings
- Working with Policies & Issues
- Creating Announcements