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Elevate Catalog Experience with Lineage Views and Filters

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Where data & AI come to 

Today's Speakers



Sohan Dhanuka

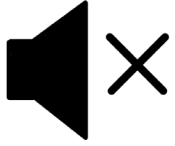
Senior Product
Manager



Krishna V

Product Manager

Housekeeping Tips



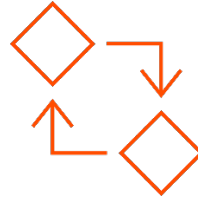
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- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Q&A option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available on our [Success Portal](#) - where you can download the **slide deck** for the presentation. The link to the recording will be emailed as well.
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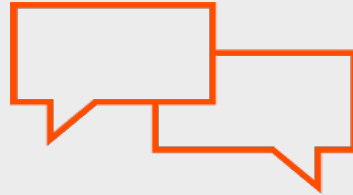
Tailored training
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recommendations

More Information



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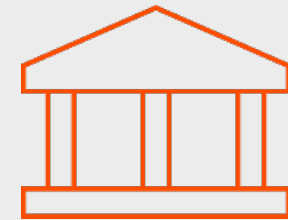
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Agenda

1 Current Challenges

2 New Capabilities to address challenges

3 Demo

4 Q&A

Too Many Assets, Too Little Focus

- Enterprise data catalogs can hold **tens of thousands of assets** – tables, fields, reports, pipelines, metrics etc and can lead to overwhelming lineage.
- **Lineage graphs** become sprawling and unreadable.
- Too many asset types - tables, views, reports, dashboards, pipelines, fields, metrics all appear at the same visual weight.
- Lack of simplified end-to-end view of asset lineage in a portable tabular format for offline analysis.
- Technical and business contexts are often mixed, making it difficult for specific personas to find relevant information.

Solving the Lineage Challenge: Views & Filters

Operationalizing the Metadata Catalog: From Clutter to Clarity

Lineage Views

Tailored Perspectives

- **Custom Scoping:** Create, save, and pin views to focus on specific workstreams.
- **Collaboration:** Share perspectives across the organization.

Filters

Noise Reduction

- **Quick Filters:** Instantly hide process nodes or reference assets to reduce clutter.
- **Complexity Shield:** Scope views to show only what is relevant to the task.

Export

Offline Analysis & Audit

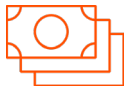
- **Full Asset Export:** Export lineage into structured CSV/XLSX for offline review.
- **Multi-Level Scope:** Operates at both System and Data Element levels.

Lineage Views



Key Highlights

- Ability to create lineage views with overlays, lineage depth or filters
- Share views users/user groups with either view or edit permissions.
- Create multiple views for business & technical lineage and switch between them.
- Pin important lineage views to access them at ease.



Benefits

- Fine grained control on what you see on lineage canvas.
- Saves time, your most used or critical views can be easily accessed.
- Different views based on context allowing others to see same.

The screenshot displays the 'Lineage' interface for a 'TECHNICAL AC_View'. It includes several control panels:

- Data Lineage Level:** Set to 'DATA ELEMENT'.
- Filters:** Includes 'Quick Filters' with options for 'Hide data processes' (unchecked) and 'Hide reference assets' (checked). There is an 'Add Rules For Asset Preferences' link.
- Flow Lines:** Includes options for 'Enable all flow lines for attributes' (unchecked) and 'Enable loops' (unchecked).
- Overlays:** Includes 'Certification' (checked), 'Calculation' (checked), and 'Sensitivity' (unchecked).
- Tags:** Includes 'Certification' (checked).
- Manage Sharing:** Options for 'Private', 'Share with specific users, user groups and roles' (selected), and 'Share with all users'. A search box for users and a 'View' dropdown are present.
- Shared with (1):** A table showing a user 'CategoryOwnerGroupUser' with 'View' permissions.
- Lineage Canvas:** Shows a diagram with nodes like 'POWERBI_CS_TO_ORACLE' and 'TARGET_TABLE'. A search box is overlaid on the canvas.
- Pinned Views (5):** A table listing pinned views.

Name	Description	Distribution	Type
Downstream impact	This view is created to assess the impa...	Personal	Technical
Impact analysis	Auto_Pin_View_1774636160437_1	Personal	Technical
Technical View Default	-	Personal	Technical
Default Business View	-	System	Business
Default Technical View	-	System	Technical

Lineage Filtering



Key Highlights

- Reduce the clutter in lineage by hiding nodes based on asset type, catalog source type, lifecycle.
- Build combination of filters within lineage views for complex filtering.
- Hide any reference assets either using quick filters or view configuration.



Benefits

- Makes large scale lineage navigable and less overwhelming.
- Hiding assets clears clutter in lineage view and allows focus on what matters important.

The screenshot displays the 'Lineage TECHNICAL' interface. At the top, it shows 'Default Technical View'. Below this, the 'Rules' section contains an information icon and the text: 'Rules are applied in the order in which they're listed. If there are specific rules that contradict each other, the earlier rule applies and the later is ignored.' The main area features a 'Hide Show Assets where' control. A 'Quick Filters' dropdown menu is open, showing options for 'Hide data processes' and 'Hide reference assets'. The lineage diagram below shows a flow from 'ORACLE_DB_FOR_POWER_BI' (with a red stop icon) to 'POWERBLS_TO_ORACLE', and then to 'PBI_Oracle_PC'. A 'SEED' label is present on the final node. Below the diagram, another 'Hide Show Assets where' control is visible, with a search bar containing 'Asset Type Is'. At the bottom right, there are 'Apply' and 'Cancel' buttons.

Export to Tabular format

Key Highlights

- Export lineage from seed asset either in CSV/XLSX format.
- Include child (data elements) while exporting from datasets
- Additional attributes like Asset ID, catalog source name, modified by, classification etc for all for upstream and downstream assets.
- Ability to export through API

Seed Asset Path	Seed Asset Type	Asset Name	Lineage Level	Asset Id	Asset Type	Asset Path
SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	Table	CDR_Analysis_AzureSQLDW	2	5ae8453c-d10e-4172-98f7-03e52f9bdc7c	Report	PowerBI_SynapsePmFlow_6336/PM_WS/CDR_Analysis_AzureSQLDW~com.inf.a.odin.r
SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	Table	call_rec Nov2020.csv	-2	48e6b412-8cb4-46b3-bb7b-e3a7e851100f	Flat File	ADLSGen2PmFlow_6336/cmgnrddatabricks/adf/data/CDL_Webinar/call_rec_Nov2020
SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	Table	call_rec_Dec2020.csv	-2	510c59af-0eed-444c-9be1-b891ceb7afb2	Flat File	ADLSGen2PmFlow_6336/cmgnrddatabricks/adf/data/CDL_Webinar/call_rec_Dec2020
SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	Table	DataflowCustomerAnalysis (c715271f)	-1	55ab187a-fa45-4dc9-9cd4-49510a57c7db	Activity Instance	AzureDataFactoryPmFlow_6336/ADF-Utkarsh~com.inf.a.odin.models.AzureDataFactory
SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	Table	CALLRECS_WITH_INFO	1	5e34c5e2-f5cc-4dca-bc10-135f3c0b1045	Dataset Table	PowerBI_SynapsePmFlow_6336/PM_WS/CDR_Analysis_AzureSQLDW~com.inf.a.odin.r
SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	Table	test_name	-2	6d913518-f701-4caf-81d1-efbba7b10373	Table	AzureSQLPmFlow_6336/Scanners/METADEXQE/customer_master
SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	Table	call_rec_Oct2020.csv	-2	7d166684-b74d-4356-aae7-ef6d76901ec	Flat File	ADLSGen2PmFlow_6336/cmgnrddatabricks/adf/data/CDL_Webinar/call_rec_Oct2020
SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	Table	callrecs_with_info	0	ef26ff5b-a5ec-4c4f-9eae-5db6ba516b8a	Table	SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info

Include Child Assets ? Include Asset Details ?

Catalog Source Name	Catalog Source Type	Glossaries: Accepted	Data Classifications: Accepted	Certified	Stakeholder: Governance Administrator	Created On	Created By	Modified On	Modified By
PowerBI_SynapsePmFlow_6336	Microsoft Power BI			false	AWS_PM_TENANT	Jul 15, 2025, 12:52:52 PM	AWS_PM_TENANT	Jul 15, 2025, 12:52:52 PM	AWS_PM_TENANT
ADLSGen2PmFlow_6336	Adls Gen2	Transaction Date BT-1; Transaction Type BT-15		false	AWS_PM_TENANT	Jul 15, 2025, 12:25:16 PM	AWS_PM_TENANT	Jul 23, 2025, 06:49:38 AM	AWS_PM_TENANT
ADLSGen2PmFlow_6336	Adls Gen2	Transaction Type BT-1; Party Data 1a36c58c-d4d4-465		false		Jul 15, 2025, 12:25:16 PM	AWS_PM_TENANT	Jul 23, 2025, 05:56:57 AM	AWS_PM_TENANT
AzureDataFactoryPmFlow_6336	Azure Data Factory			false		Jul 15, 2025, 12:25:27 PM	AWS_PM_TENANT	Jul 15, 2025, 12:25:27 PM	AWS_PM_TENANT
PowerBI_SynapsePmFlow_6336	Microsoft Power BI			false		Jul 15, 2025, 12:53:02 PM	AWS_PM_TENANT	Jul 15, 2025, 12:53:02 PM	AWS_PM_TENANT
AzureSQLPmFlow_6336	SqlServer	Transaction Date BT-1; Party Data 1a36c58c-d4d4-465		false		Jul 15, 2025, 12:25:17 PM	AWS_PM_TENANT	Jul 24, 2025, 08:22:52 PM	AWS_PM_TENANT
ADLSGen2PmFlow_6336	Adls Gen2			false		Jul 15, 2025, 12:25:16 PM	AWS_PM_TENANT	Jul 15, 2025, 12:25:16 PM	AWS_PM_TENANT
SynapsePmFlow_6336	Azure Synapse			false		Jul 15, 2025, 12:25:06 PM	AWS_PM_TENANT	Jul 15, 2025, 12:25:06 PM	AWS_PM_TENANT

Customer_NEW_ZU26_U4_ZU_143000

Created By	Modified On	Modified By	Lifecycle	Business Unit [CA]	Additional Information [CA]	Immediate Upstream	Immediate Downst
AWS_PM_TENANT	Jul 15, 2025, 12:52:52 PM	AWS_PM_TENANT	Published			PowerBI_SynapsePmFlow_6336/PM_WS/CDR_Analysis_AzureSQLDW~com.inf.a.odin.r	AzureDataFactoryP
AWS_PM_TENANT	Jul 23, 2025, 06:49:38 AM	AWS_PM_TENANT	Published	[BU1, BU3]	My Value		AzureDataFactoryP
AWS_PM_TENANT	Jul 23, 2025, 05:56:57 AM	AWS_PM_TENANT	Published	[BU1]			AzureDataFactoryP
AWS_PM_TENANT	Jul 15, 2025, 12:25:27 PM	AWS_PM_TENANT	Published			AzureSQLPmFlow_6336/Scanners/METADEXQE/customer_maste	SynapsePmFlow_6
AWS_PM_TENANT	Jul 15, 2025, 12:53:02 PM	AWS_PM_TENANT	Published			SynapsePmFlow_6336/scanners_dw/dbo/callrecs_with_info	PowerBI_SynapseP
AWS_PM_TENANT	Jul 24, 2025, 08:22:52 PM	AWS_PM_TENANT	Published				AzureDataFactoryP
AWS_PM_TENANT	Jul 15, 2025, 12:25:16 PM	AWS_PM_TENANT	Published				AzureDataFactoryP
AWS_PM_TENANT	Jul 15, 2025, 12:25:06 PM	AWS_PM_TENANT	Published			AzureDataFactoryPmFlow_6336/ADF-Utkarsh~com.inf.a.odin.mo	PowerBI_SynapseP

Benefits

- Easier Analysis of large complex lineage
- Makes lineage data portable and accessible outside the catalog tool
- Enables offline analysis, audits, or compliance reporting

Key Takeaways

- **Views give you the right perspective** – Build views for specific intent using overlays for Ex - DQ view, Sensitivity view etc.
- **Pinning & Sharing make the lineage view a team asset** – not just for an individual but views can be shared to drive collaboration.
- **Filters gives you focus** – Quick Filters (Hide reference assets, data processes), Asset Type, Catalog source Type filters allows to cut through noise.
- **Export to CSV / XLSX** – download full lineage at dataset & data element level for offline review, compliance/audit needs. Very helpful for large lineage.
- **Start simple:** System Views → add Quick Filters → save as Personal View → pin → share → iterate

DEMO

