

# OvalEdge Academy Transcript:

## Data Discovery

### Video: How to Search and Filter

Hi, I'm Caleb, and today we'll be exploring the different ways you can search and filter data for data discovery within OvalEdge. Let's start on the home page.

#### Global Search

OvalEdge comes with a powerful search engine to assist with data discovery called global search. With global search, you can search keywords and apply filters.

I'll type 'Hospital' into the search bar on the page header and search. I'm looking for a specific dataset in a table, so I will filter to 'tables only' by using the object tabs on the left side of the screen. Here is the table I am looking for, 'Hospital Employee.' I can continue my discovery by clicking on that table to review further details.

#### Tags

Tags help organize data and bind together conceptually similar objects for quick access and discovery.

The Tags widgets on the home page allow you to navigate to the top tags easily. On the left panel menu, you can locate all other tags. Let's say I'm interested in grouping my team's daily reports. I created a tag called 'Team A' and associated it with my reports. Now, I can easily navigate to my 'Team A' tags to retrieve an immediate list of reports.

Tags have many uses and can allow users to quickly find grouped information that you use on a regular basis.

#### Data Catalog Home Screen

I can always use the data catalog if I want to specifically find a report.

Select the data catalog from the left panel menu, and click on the type of asset you wish to search using the object tabs across the top of the page. I will be selecting Reports. I am interested in my 'Superstore Summary' reports, so I will use the 'filter' icon on the 'Report Name' column. I can type any title to retrieve a list of reports that contain that string in their title.

If you look at the icons across the top of the page, you'll see that there is either a string field, identified by the magnifying glass, or a dropdown. When using the magnifying glass, you can enter a title, or you can apply a condition to this filter by specifics like "does not contain" or "is not empty." This functionality will appear anywhere in the tool that can be seen in the "list view," as seen here.

### **Business Glossary**

When you go to the Business Glossary, it opens in a 'Tree View.' This provides an easy way to search for a term and see a preview of the definition of that term as it is published. If you would like more detailed information, you can select the detail option, and it will open the term with all the additional custom fields, details, curation team members, and more.

If the list view is what you prefer, you can select it at the top of the page, and you will see the grid style. Notice across the top, you have the options to filter or search for a term which will behave the same as when we searched through the data catalog.

### **Dashboard Reports**

If I am specifically looking for a report, I can always go to the dashboard on the left panel menu and select 'All reports.' On this screen, I will see thumbnails representing each report, provided I am signed in to the tool where the report is housed. In my case, I am not signed in to Tableau.

When I click on the Tableau report, I am prompted to sign in, and once I do, the preview populates. You can also search for a specific report using the search bar in the top right corner of the screen.

Thanks for watching!