Business Glossary Best Practices

Abstract

This article provides best practices for migrating, configuring, and using Business Glossary.

Supported Versions

- Informatica Power Center 9.6.1 HotFix 3
- Informatica Data Quality 9.6.1 HotFix 3
- Informatica Enterprise Data Catalog 10.2.2

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Migrating Business Glossaries from Metadata Manager to the Analyst Tool

Effective in version 9.6.0, Metadata Manager business glossaries are deprecated and replaced with Informatica Analyst business glossaries.

If you have a Metadata Manager business glossary that you created earlier than 9.6.0, you must export the glossary from the previous version of Metadata Manager before you upgrade to version 9.6.x. After you upgrade, you can import the glossary into Informatica Analyst. To view the Informatica Analyst business glossary in Metadata Manager, create a Business Glossary resource in Metadata Manager version 9.6.x.

Business Glossary connects to the following services:

- Model Repository Service
- Analyst Service
- Search Service

Business Glossary connects to the following databases:

- Model repository database
- Domain configuration repository

The upgrade process for business glossaries consists of the following phases:

1. Before you upgrade the domain, export and purge business glossaries from Metadata Manager.
2. If business terms or categories were linked across glossaries in Metadata Manager, merge the glossary export files and delete duplicate business terms.

3. Upgrade the domain.

4. Upgrade the Metadata Manager and Analyst application services.

5. Merge the business glossaries into one Microsoft Excel file.

6. Import business glossaries into the Analyst tool.

7. Create and load resources in Metadata Manager that are based on the Analyst tool business glossaries

For more information about the differences between business glossaries in versions 9.5.x and 9.6.x, see the *Business Glossary 9.5.x to 9.6.x Transition Guide.*

Before Upgrading the Domain

Before you upgrade the domain, prepare Metadata Manager.

1. Back up the Metadata Manager warehouse.

2. Export and delete business glossaries.

3. Disable the Metadata Manager Service.

For more information about the upgrading from PowerCenter 9.5.x to PowerCenter 9.6.x., see the *Upgrading from Version 9.5.x Guide*.

Export and Delete Business Glossaries

Effective in version 9.6.0, business glossary functionality was moved from Metadata Manager to the Analyst tool. Before you upgrade the domain, you must export and delete business glossaries from Metadata Manager. You use the Metadata Manager glossary export files to create corresponding business glossaries in the Analyst tool after upgrade.

Tip: Before you export business glossaries from Metadata Manager, check the business glossary model for unused custom attributes. Similarly, check the glossaries for unused business terms and categories. Remove these objects before you start the business glossary migration process so that unused objects are not migrated to the Analyst tool glossaries.

To export and delete business glossaries from Metadata Manager, perform the following tasks:

1. Back up linking rule and enumerated link files.

   If the business glossaries that you want to upgrade use linking rule files and enumerated link files to establish data lineage, back up the linking rule files and enumerated link files. After you create the business glossaries again in the Analyst tool, use these files to create lineage links for the corresponding business glossary resources in Metadata Manager.

   Note: This step is required when a Metadata Manager business glossary uses linking rule files and enumerated link files. If the Metadata Manager business glossaries do not use linking rule files and enumerated link files, you can skip this step.

2. Export the Business Glossary model.

   The Analyst tool uses the model export XML file to create properties that you can add to the business term template.

   Note: This step is required if custom attributes were added to the business glossary model. If no custom attributes were added to the model, you can skip this step.

3. Export each business glossary to a Microsoft Excel file.

   Export each business glossary that you want to upgrade. After upgrade, you import these files into the Analyst tool to create the business glossaries again in the Analyst tool.

4. Update each Microsoft Excel file.

   Update each exported Microsoft Excel file so that it conforms to the Analyst tool glossary import file format.

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5. Purge and delete business glossaries.

   You must purge and delete the glossaries from Metadata Manager before you upgrade. If you do not perform this step, the glossaries remain in the Metadata Manager repository as read-only resources that you cannot edit or synchronize with the Analyst tool.

After you upgrade, import each Microsoft Excel business glossary file into the Analyst tool. Instructions for importing the glossaries appear in the "After You Upgrade" chapter in the *Upgrading from Version 9.5.x Guide*.

After Upgrading the Domain

The following tasks are best practices that you can follow after you upgrade the domain:

- After you upgrade the Model Repository Service, check the log to verify that the upgrade completed successfully.
- To upgrade the Metadata Manager Service, a user must have the Manage Services privilege for the domain and permission on the Metadata Manager Service.

Recycle the Analyst Service

To access the Analyst tool after you upgrade, recycle the Analyst Service. Before you recycle the Analyst Service, complete the upgrade and post-upgrade steps for the Model Repository Service and Data Integration Service. After you recycle the Analyst Service, wait for at least 10 minutes before you access the **Glossary** workspace.

Before you recycle the Analyst Service, verify that you have performed the following tasks:

- Upgrade the Model Repository Service.
- Upgrade the Data Integration Service.

Note: The Model Repository Service and the Data Integration Service must be running before you recycle the Analyst Service.

Importing Business Glossaries

If you exported business glossaries from Metadata Manager, import the glossaries into the Analyst tool after you upgrade. Enable the Analyst Service, the Model Repository Service, and the Data Integration Service before you import the glossaries.

Additionally, verify that your product license includes the Business Glossary option. If your license does not include the Business Glossary option, the Analyst tool does not display the **Glossary** workspace.

After you import business glossaries and complete the post-upgrade tasks for the Metadata Manager Service, you can create business glossary resources in Metadata Manager.

To import business glossaries into the Analyst tool, complete the following tasks:

1. If custom attributes were added to the business glossary model in Metadata Manager, import the Metadata Manager model export file. This file is in .xml format.

   The Analyst tool uses the model export file to create properties for attributes that do not exist in the business term template by default.

   Note: If no custom attributes were added to the business glossary model in Metadata Manager, you can skip this step.

2. If business terms and categories were linked across glossaries in Metadata Manager, merge the exported Microsoft Excel business glossary files into one file and delete duplicate business terms.

Metadata Manager exports business terms from other glossaries when the business terms are linked to categories in the glossary that you exported. You must delete the duplicate business terms after you merge the Microsoft Excel files and before you import the file into the Analyst tool.

Note: If no business terms and categories were linked across glossaries, you can skip this step.

3. Import business glossary files. The Metadata Manager service name must be in the .xls file if you have asset links.

    Import each Microsoft Excel business glossary file into the Analyst tool. If you have merged the Microsoft Excel business glossary file into one file, import the merged file. This step imports the glossary into the Analyst tool.

4. Publish the categories and unpublished terms.

    The Analyst tool sets the phase for all categories to draft. Publish the categories so that they are visible when you create business glossary resources in Metadata Manager. Terms that are not published are not loaded into Metadata Manager. Therefore, you must publish all unpublished terms that you want to view in Metadata Manager.

Create Business Glossary Resources

After you upgrade, create business glossary resources in Metadata Manager. Create one resource for each Analyst tool business glossary that you want to view in Metadata Manager.

Before you log in to Metadata Manager and create Business Glossary resources, clear the browser cache to ensure that Metadata Manager displays information for the upgraded glossaries only.

Complete the following tasks for each business glossary:

1. Create a business glossary resource.

    Create one business glossary resource for each Analyst tool business glossary that you want to view in Metadata Manager.

2. For each glossary that uses enumerated links or rule-based links, associate the linking rule files and enumerated link files with the business glossary resource.

    Note: If the Metadata Manager business glossaries do not use linking rules files or enumerated links files, you can skip this step.

3. Load the resource.

    Load the resource to extract business glossary metadata from the Analyst tool and load it into the Metadata Manager repository.

User and Role Management

You perform user and role management for Business Glossary in the Administrator tool and Analyst tool. You create users and assigns privileges to access the Analyst tool and Glossary workspace in the Administrator tool. You assign roles and permissions to Glossary assets in the Analyst tool.

Delegated Administration in Business Glossary

You perform user and role management for Business Glossary in the Administrator tool and the Analyst tool. You can delegate administrators to manage users and roles.

Business Glossary is intended to be used across departments, roles, and partners of an organization. You do not require to have a central team to perform user and role management.

The following image shows the delegated administration model of Business Glossary:
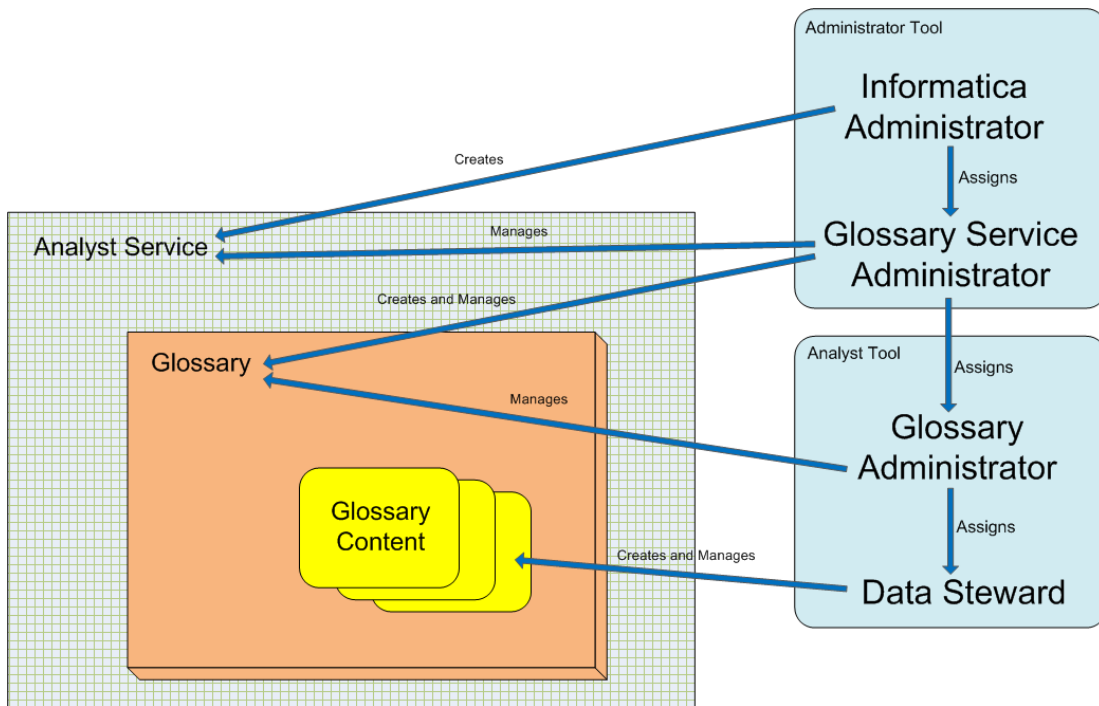
Informatica administrator

> Uses the Administrator tool to creates an administrator for Business Glossary.

Glossary service administrator

> Uses the Administrator tool to create glossaries and appoints glossary administrators to perform administrative duties on individual glossaries.

Glossary administrator

> Assigns privileges or roles to other glossary users based on the tasks that they perform. Customizes asset templates. An organization can create multiple glossaries. Every glossary can have a different glossary administrator.

Data steward

> Understands requirements of the department or organization and adds business terms, policies, and categories to glossaries. Defines rules and determines valid values for business term data. Works with the glossary administrator to customize policy and business term pages.

Roles and Privileges in the Administrator Tool

The Informatica administrator creates an account for the Glossary service administrator. A Glossary service administrator creates user accounts for Glossary administrators, stakeholders, owners, data stewards, Glossary consumers and assigns roles or privileges.

Custom Analyst Service Roles

You can assign the following custom role to users and groups in the Administrator tool:

Analyst Service Business Glossary Consumer

> Provides users and groups the necessary permission and privilege to view the Glossary workspace in the Analyst tool. Assign this privilege to Glossary consumers who only view and who do not edit Glossary content.

Analyst Service Privileges

You can assign the following Analyst Service privileges to users and groups in the Administrator tool:

Manage Glossaries

> User is able to manage the business glossary. Assign this privilege to Glossary service administrators.

Glossary Workspace

> User is able to access the **Glossary** workspace. Assign this privilege to all users of Business Glossary.

Model Repository Service Privileges

You can assign the following Model Repository privileges to users and groups in the Administrator tool:

Access Analyst

> User is able to access the Model repository from the Analyst tool. This privilege is required for all users who access the Glossary workspace. Assign this privilege to all users of Business Glossary.

Roles and Permissions in the Analyst Tool

A glossary administrator manages the privileges, roles, and permissions of the users and groups within the Analyst tool.

Users can perform tasks based on the roles, privileges, and permissions that you assign to them. Privileges and roles that you assign to a user determine the actions that the user can perform. Privileges and roles that you assign to a group determine the actions that all users in the group can perform. Permissions that you assign to a user determine the Glossary assets that the user can access. Use permissions to hide Glossary assets and to provide read and write access to glossaries, business terms, policies, and categories.

Default Roles

You can assign the following default roles to users and groups in the Analyst tool:

Glossary administrator

> The service administrator assigns the glossary administrator role to a user who manages users and templates for a glossary.
>
> The glossary administrator performs the following tasks:

- Assigns permission to users who access Glossary assets.
- Assigns data steward and stakeholder roles to users who create content and participate in the review of Glossary assets.
- Creates custom roles and assigns custom roles to users.
- Modifies Glossary asset and business initiative templates to customize the layout and properties of the glossary.
- Imports or exports glossaries.

Data steward

> The glossary administrator assigns a data steward role to a user who creates and manages Glossary assets.
>
> The data steward performs the following tasks:

- Defines categories, policies, and business terms.
- Proposes a Glossary asset for review.
- Collaborates with the stakeholder and publishes the Glossary asset after approval.

- Updates the Glossary asset based on the requirements of the organization.

Stakeholder

The glossary administrator assigns a stakeholder role to a subject matter expert who reviews draft Glossary assets.

The stakeholder performs the following tasks:

- Reviews a draft Glossary asset and collaborates with the data steward to propose modifications.
- Adds a comment to the Glossary asset to communicate the approval status.

There are no default roles for owners and Glossary consumers. You can assign privileges to users who are owners and Glossary consumers based on the tasks you want the users to perform.

Privileges

The following table describes the privileges in the Glossary Security workspace:

Privilege	Description
Add Comments	View or add comments.
Administer Users	Assign permissions and privileges to other users.
Assign Stakeholders	Assign a stakeholder to a Glossary asset.
Assign Stewards	Assign a data steward to a Glossary asset.
Create Drafts	Create draft versions of Glossary assets.
Delete Drafts	Delete draft versions of Glossary assets.
Edit Templates	Configure Glossary asset and business initiative templates.
Import and Export	Import or export a glossary.
Manage Initiative	Publish or reject Glossary assets that are part of a business initiative.
Publish Glossary Assets	Publish a Glossary asset after the approval process.
View Assets	View external asset links such as data assets and rule assets.
View Drafts	View draft versions of Glossary assets.

Permissions

Assign permissions to a user or group to control access to glossaries and Glossary assets.

You can assign the following permissions to users:

Option	Description
Allow	Permits the user to view or edit the Glossary asset.
Deny	Prevents the user from viewing or editing the Glossary asset.

When you assign a role to a user, the Analyst tool does not explicitly assign the read permission. To provide access to glossaries and Glossary assets, assign the **Allow** permission.

Using Business Glossary

In the Analyst tool, define business glossaries in the Glossary workspace. The Glossary workspace can contain multiple business glossaries. Each business glossary contains assets such as, business terms, categories, and policies.

Creating and Managing Glossary Assets

Business terms, categories, and policies are Glossary assets that data stewards create in glossaries to document business data for Glossary consumers.

Glossary consumers identify Glossary assets by name. A glossary can contain multiple assets with the same name. The properties of the asset provide a definition of the asset and describe their purpose. Glossary assets can be linked with one another to form meaningful relationships. The glossary structure is defined by the relationships between assets. Each type of asset has a specific purpose. You can assign a data steward, stakeholder, and owner to each asset.

- Create a group of users in the Analyst tool for data stewards. Assign the data steward role to the group in the Analyst tool. When a user is no longer required to perform the role of a data steward for a Glossary asset, you can remove the user from the group instead of removing the user from the data steward role for the Glossary asset.
- Use Microsoft Excel to create glossary content. For information, see the Informatica How-To Library article Creating Glossary Content Using Microsoft Excel.
- Use Microsoft Excel to perform bulk modifications to Glossary assets. For more information about the data in the business glossary export file and to edit Glossary assets in bulk, see the Informatica How-To Library article Business Glossary Export File Description.
- Use the Inactive status to retire an asset if the asset is no longer valid for the organization. You can delete draft assets which do not have previous versions. You cannot delete an asset which is in the In Review, Published or Rejected phase.
- Use the synonyms property of a business glossary to define aliases for a business term. Users who search for words that are defined as synonyms can see the business term in the search result.

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