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Business Glossary Getting Started Guide

Informatica Business Glossary Getting Started Guide
10.5.3
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Preface

Use the *Informatica® Business Glossary Getting Started Guide* to create and view Business Glossary content. It provides a tutorial to help first-time users learn how to use Informatica Business Glossary.

Important: Informatica recommends that you use Axon Data Governance instead of Business Glossary for enhanced functionality.

Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

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- View product availability information.
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Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services and based on real-world experiences from hundreds of data management projects. Informatica Velocity represents the collective knowledge of Informatica consultants who work with organizations around the world to plan, develop, deploy, and maintain successful data management solutions.

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To find online support resources on the Informatica Network, visit https://network.informatica.com and select the eSupport option.

CHAPTER 1

Getting Started Overview

This chapter includes the following topics:

- Business Glossary Overview, 9
- Business Glossary Users, 10
- The Tutorial Story, 10
- The Tutorial Structure, 11
- Tutorial Prerequisites, 12
- Informatica Business Glossary Tutorial, 12

Business Glossary Overview

Business Glossary is made up of online glossaries of business terms and policies that define important concepts within an organization. Data stewards create and publish terms that include information, such as descriptions, relationships to other terms, and associated categories. Glossaries are stored in a central location for easy lookup by end-users.

Glossary assets include business terms, categories, and policies that contain information that consumers might search for. A glossary is a high-level container that stores Glossary assets. A business term defines relevant concepts within the organization, and a policy defines the business purpose that governs practices related to the term. Business terms and policies can be associated with categories, which are descriptive classifications.

A data steward publishes terms, categories, and policies after the approval process is complete. To publish many Glossary assets at once, the data steward can create a business initiative. A business initiative contains terms, categories, and policies that are impacted by a business decision or business change. A merger between two organizations is an example of a business change that might impact multiple Glossary assets.

Administrators create glossaries and templates that data stewards use to define business terms, categories, policies, and business initiatives. Data stewards standardize definitions, rules, and valid values for data across the organization.

After an asset is published, Glossary consumers can look up the asset through the Analyst tool. All Glossary consumers can view the history of an asset and follow the asset to receive notifications of changes.

Business Glossary Users

The following users interact to manage a business glossary in the Analyst tool.

Glossary Administrators

The following types of administrators manage glossaries users and roles in the Analyst tool:

Service administrators

Creates glossaries and appoints glossary administrators to perform administrative duties on individual glossaries.

Glossary administrators

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.

Glossary Content Managers

The following users are responsible for creating, approving, and managing Glossary assets:

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. Data stewards work with subject matter experts, stakeholders, and glossary owners to perform tasks.

Stakeholders

Reviews business terms and policies that data stewards propose. Stakeholders are business users who participate in the approval of the proposed business terms and policies.

Owners

Owns glossaries, business terms, and policies. Owners have no tasks to perform but are leaders of business units or functional areas. Owners have the required functional expertise and experience to be responsible for the glossary and the contents of the glossary.

Glossary Consumers

Consumers are readers of Glossary assets. Consumers do not participate in content creation.

The Tutorial Story

GQD is a large financial organization with a few thousand employees. Like any other corporation, GQD must file their annual financial report in the form of a Section 10K report in the United States of America. Part of the Section 10k report is the Section 10Q report, which is filed quarterly. Employees have access to the Section 10Q report.

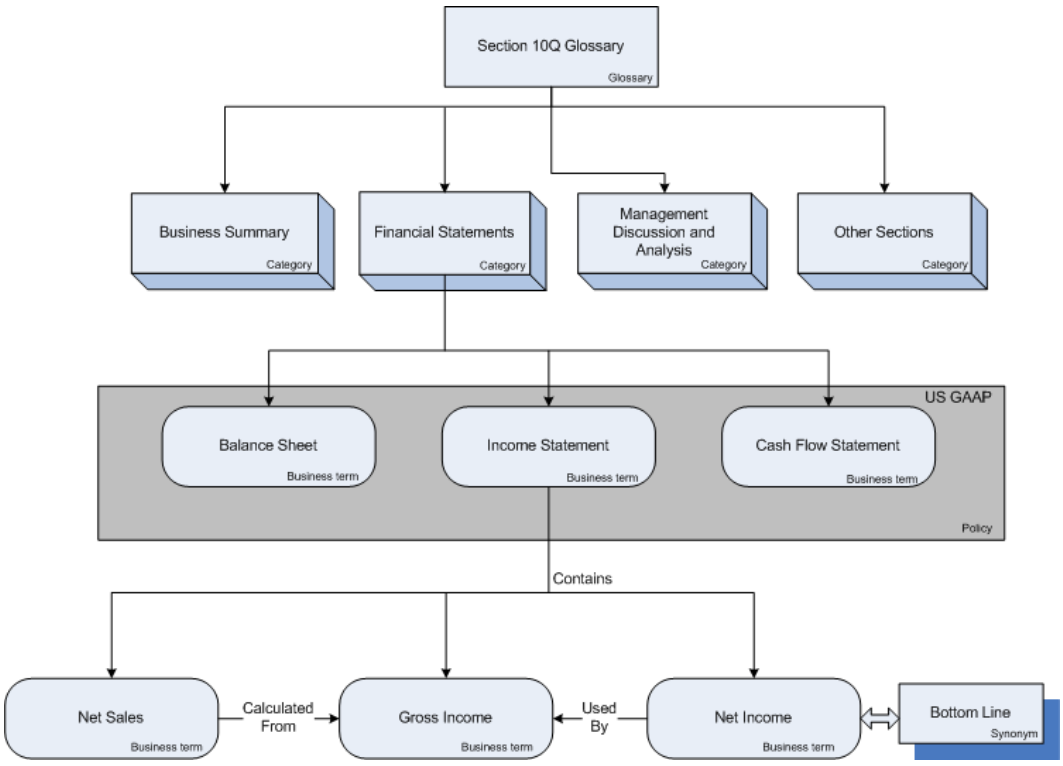
GQD requires a glossary of business terms that they use in the Section 10Q report. They decide to base the Section 10Q glossary on an industry-standard glossary. Employees can refer to the Section 10Q glossary when they find terms that are difficult to understand in the report. GQD wants to define their glossary in Informatica Business Glossary.

Employees can browse the business terms in the Section 10Q glossary based on categories. They can view the policies specific to the organization and policies that are widely used in the financial domain. These

policies govern the business terms. Technical metadata, such as Oracle database columns, is linked to the terms to provide references to data in business systems.

Employees can look up Glossary assets in the Analyst tool or using Business Glossary Desktop. Employees can use a hot-key combination to launch Business Glossary Desktop to look up terms from any application. The Analyst tool displays extended business term properties, such as a relationship view diagram, audit history, comments and links to technical metadata.

The following image shows a part of the Section 10Q Glossary:



The Tutorial Structure

The *Getting Started Guide* contains tutorials that include lessons and tasks.

Lessons

Each lesson introduces concepts that will help you understand the tasks to perform in the lesson. The lesson provides business requirements from the overall story. The objectives for the lesson outline the tasks that you will perform to meet business requirements.

Tasks

The tasks provide step-by-step instructions. Perform all tasks in the order listed to complete the lessons.

Tutorial Prerequisites

Before you start the tutorial, you must have the following prerequisites:

Informatica Administrator

The Informatica domain is the fundamental administrative unit in Informatica. Informatica Administrator (the Administrator tool) consolidates the administrative tasks for domain objects. Ensure that you have access to the Administrator tool as an administrator.

Model Repository Service

The Model repository stores metadata created by Informatica products in a relational database to enable collaboration among the products. The Model Repository Service manages the Model repository for Business Glossary.

Analyst Service

The Analyst Service is an application service that runs the Analyst tool in the Informatica domain. The Analyst Service manages the connections between service components and the users that have access to the Analyst tool.

Business Glossary Desktop

Business Glossary Desktop is a standalone application that you can use to look up business terms in a business glossary. Ensure that you have Business Glossary Desktop set up and configured to connect to the Analyst service.

Search Service

The Search Service manages search in the Analyst tool and Business Glossary Desktop. By default, the Search Service returns search results from a Model repository, such as data objects, mapping specifications, profiles, reference tables, rules, and scorecards.

Metadata Manager Service (Optional)

The Metadata Manager Service is an application service that runs the Metadata Manager application in an Informatica domain. The Metadata Manager application manages access to metadata in the Metadata Manager repository. Create a Metadata Manager Service in the same domain to access the Metadata Manager application.

The task you perform in Metadata Manager is optional and is described in the Appendix.

Data Integration Service

The Data Integration Service is an application service in the Informatica domain that performs data integration tasks for the Analyst tool, the Developer tool, and external clients. The approval workflow requires the Data Integration Service.

Informatica Business Glossary Tutorial

In this tutorial, you log in to the Analyst tool as different users to perform different tasks. Each user persona is a Business Glossary user who has a specific set of tasks to perform.

You can perform the following tasks in Part 1:

Lesson 1. Creating Users in Informatica Administrator

As an Informatica administrator, log in to the Administrator tool to set up users who access Business Glossary in the Analyst tool.

Lesson 2. Creating and Setting up a Section 10Q Glossary

As a Service administrator, log in to the Analyst tool to create the Section 10Q Glossary and assign users to access the glossary.

Lesson 3: Customizing the 10Q Glossary

As a Glossary administrator, log in to the Analyst tool to create custom properties and relationships. Data stewards can use the custom properties and link business terms with custom relationships.

You can perform the following tasks in Part 2:

Lesson 1: Creating and Publishing a Category

As a data steward, log in to the Analyst tool to create, propose, and publish a category.

Lesson 2: Creating and Publishing a Policy

As a data steward, log in to the Analyst tool to create, propose, and publish a policy.

Lesson 3: Creating Business Terms

As a data steward, log in to the Analyst tool to create a business term.

Lesson 4: Extending the Business Term

As a data steward, log in to the Analyst tool to extend the business term properties by linking technical metadata and adding synonyms, default and custom relationships.

Lesson 5: Publishing a Business Term

As a data steward, publish a single business term.

Lesson 6: Creating and Publishing a Business Initiative

As a data steward, create and publish a business initiative to publish business terms in bulk.

You can perform the following tasks in Part 3:

Lesson 1: Viewing Assets in Informatica Analyst

As a Glossary consumer, log in to the Analyst tool to view the assets.

Lesson 2: Viewing Assets in Business Glossary Desktop

As a Glossary consumer, launch Business Glossary Desktop from a third-party application to view assets.

You can perform the following tasks described in the Appendix:

Creating Asset Links

As a technical user of Metadata Manager, link metadata objects to business terms in the Metadata Manager. The links are available in the Analyst tool as asset relationships. This is an optional lesson.

Part I: Setting Up Business Glossary

This part contains the following chapters:

- Lesson 1. Creating Users in Informatica Administrator, 15
- Lesson 2. Creating and Setting up a 10Q Glossary, 21
- Lesson 3. Customizing the 10Q Glossary, 27

CHAPTER 2

Lesson 1. Creating Users in Informatica Administrator

This chapter includes the following topics:

- Creating Users in Informatica Administrator Overview, 15
- Task 1: Creating a Service Administrator, 16
- Task 2: Creating a Glossary Administrator, 17
- Task 3: Creating Content Managers, 18
- Task 4: Creating a Glossary Consumer, 19

Creating Users in Informatica Administrator Overview

Informatica Administrator (Administrator tool) is the administration tool that you use to administer the Informatica domain and Informatica security. You can use the Administrator tool to perform security administrative tasks.

Story

The organization has a team of content managers that creates and publishes Glossary assets. Some of the employees who need to view extended term properties, relationships, categories and polices require access to the Analyst tool. Content managers require permission to manage and view content.

Objectives

In this tutorial, you will perform the following tasks:

- in Informatica Administrator, create users who access Business Glossary.
- Assign privileges and permissions to the users.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- Verify that the Analyst tool service is running.
- Verify that you have the credentials to log in to the Administrator tool as an administrator.

Task 1: Creating a Service Administrator

As an Informatica administrator, log in to the Administrator tool to create a service administrator for Informatica Analyst. The service administrator manages users for Business Glossary.

1. In the Administrator tool, click the **Security** tab.
2. On the **Security Actions** menu, click **Create User**.
3. Enter the following details for the user:

Property	Description
Login Name	BGServiceAdmin
Password	BGServiceAdmin
Confirm Password	BGServiceAdmin
Full Name	Business Glossary Service Administrator
Description	Business Glossary Service Administrator for the Getting Started Tutorial.
Email	bgserviceadmin@bggsg.com
Phone	123-000-6788

4. Click **OK** to save the user account.

   After you create a user account, the details panel displays the properties of the user account and the groups that the user is assigned to.

Assigning Permissions and Privileges to the Service Administrator

1. In the Administrator tool, click the **Security** tab.
2. In the Navigator, select the BGServiceAdmin user.
3. Click the **Privileges** tab.
4. Click **Edit**.

   The **Edit Roles and Privileges** dialog box appears.
5. To assign roles, expand the Analyst service in the **Roles** tab.
6. Under **System Defined Roles**, select the **Administrator** role .
7. To assign privileges, click the **Privileges** tab.
8. Expand the Model Repository service and select **Access Analyst** under **Model Repository Service Administration**.
9. Expand the Analyst service, and select **Manage Glossaries** under **Glossary Administration** and **Glossary Workspace** under **Workspace Access**.
10. Click **OK**.

Task 2: Creating a Glossary Administrator

As an Informatica administrator, log in to the Administrator tool to create a glossary administrator. The glossary administrator customizes asset templates, and assigns privileges or roles to other glossary users based on the tasks that they perform.

1. In the Administrator tool, click the **Security** tab.
2. On the **Security Actions** menu, click **Create User.**
3. Enter the following details for the user:

Property	Description
Login Name	BGGlossaryAdmin
Password	BGGlosassryAdmin
Confirm Password	BGGlossaryAdmin
Full Name	Business Glossary Administrator
Description	Business Glossary Administrator for the Getting Started Tutorial.
Email	bgglossadmin@bggsg.com
Phone	123-000-6778

4. Click **OK** to save the user account.

   After you create a user account, the details panel displays the properties of the user account and the groups that the user is assigned to.

Assigning Permissions and Privileges to the Glossary Administrator

1. In the Administrator tool, click the **Security** tab.
2. In the Navigator, select the BGGlossaryAdmin user.
3. Click the **Privileges** tab.
4. Click **Edit**.

   The **Edit Roles and Privileges** dialog box appears.
5. To assign roles, in the **Roles** tab expand the Analyst service.
6. Under **System Defined Roles**, select the **Analyst Service Business Glossary Consumer** role.
7. To assign privileges, click the **Privileges** tab.
8. Expand the Model Repository service, and select **Access Analyst** under **Model Repository Service Administration**.
9. Expand the Analyst service, and select **Manage Glossaries** under **Business Glossary** and **Glossary Workspace** under **Workspace Access**.
10. Click **OK**.

Task 3: Creating Content Managers

As an Informatica administrator, log in to the Administrator tool to create a data steward, stakeholder and owner. The content managers own, create, approve, and publish Glossary assets.

1. In the Administrator tool, click the **Security** tab.
2. On the Security Actions menu, click **Create User**.
3. Enter the following details for the user:

Property	Description
Login Name	BGSteward
Password	BGSteward
Confirm Password	BGSteward
Full Name	Business Data Steward
Description	Business Glossary Data Steward for the Getting Started Tutorial.
Email	bgds@bggsg.com
Phone	123-000-6718

4. Click **OK** to save the user account.

   After you create a user account, the details panel displays the properties of the user account and the groups that the user is assigned to.
5. Repeat steps 2 and 3 by entering the following details for the user:

Property	Description
Login Name	BGStakeholder
Password	BGStakeholder
Confirm Password	BGStakeholder
Full Name	Business Glossary Stakeholder
Description	Business Glossary Stakeholder for the Getting Started Tutorial.
Email	bgstakeholder@bggsg.com
Phone	123-000-6727

6. Click **OK** to save the user account.

7. Repeat steps 2 and 3 by entering the following details for the user:

Property	Description
Login Name	BGOwner
Password	BGOwner
Confirm Password	BGOwner
Full Name	Business Glossary Owner
Description	Business Glossary Owner for the Getting Started Tutorial.
Email	bgglossowner@bggsg.com
Phone	123-000-6632

8. Click **OK** to save the user account.

Assigning Permissions and Privileges to the Content Managers

1. In the Administrator tool, click the **Security** tab.
2. In the Navigator, select the BGSteward user.
3. Click the **Privileges** tab.
4. Click **Edit**.

   The **Edit Roles and Privileges** dialog box appears.
5. To assign roles, expand the Analyst service in the **Roles** tab.
6. Under **System Defined Roles**, select the **Analyst Service Business Glossary Consumer** role.
7. To assign privileges, click the **Privileges** tab.
8. Expand the Model Repository service, and select **Access Analyst** under **Model Repository Service Administration**.
9. Expand the Analyst service and select **Glossary Workspace** and **Design Workspace** under **Workspace Access**.
10. Repeat steps 2 through 9 for the BGStakeholder and BGOwner users.
11. Click **OK**.

Task 4: Creating a Glossary Consumer

Log in to the Administrator tool as the Informatica administrator to create a Glossary consumer. Glossary consumers access the Analyst tool and Business Glossary Desktop to look up content.

1. In the Administrator tool, click the **Security** tab.
2. On the **Security Actions** menu, click **Create User**.

3. Enter the following details for the user:

Property	Description
Login Name	BGConsumer1
Password	BGConsumer1
Confirm Password	BGConsumer1
Full Name	Business Glossary Consumer 1
Description	Business Glossary Consumer 1 for the Getting Started Tutorial.
Email	bgconsumer1@bggsg.com
Phone	123-000-5787

4. Click **OK** to save the user account.

   After you create a user account, the details panel displays the properties of the user account and the groups that the user is assigned to.

Assigning Permissions and Privileges to Glossary Consumers

1. In the Administrator tool, click the **Security** tab.
2. In the Navigator, select the GlossaryConsumer1 user.
3. Click the **Privileges** tab.
4. Click **Edit**.

   The **Edit Roles and Privileges** dialog box appears.
5. To assign roles, expand the Analyst service in the **Roles** tab.
6. Select the **Analyst Service Business Glossary Consumer** role under **System Defined Roles**.
7. To assign privileges, click the **Privileges** tab.
8. Expand the Model Repository service and select **Access Analyst** under **Model Repository Service Administration**.
9. Expand the Analyst service and select **View Glossaries** under **Business Glossary** and **Glossary Workspace** under **Workspace Access**.
10. Click **OK**.

CHAPTER 3

Lesson 2. Creating and Setting up a 10Q Glossary

This chapter includes the following topics:

- Creating and Setting up a Section 10Q Glossary Overview, 21
- Task 1: Creating a Section 10Q Glossary, 22
- Task 2: Managing Users and Roles for the 10Q Glossary, 22
- Task 3: Configuring a Section 10Q Glossary Properties, 25

Creating and Setting up a Section 10Q Glossary Overview

A glossary is a collection of business initiatives, business terms, categories, and policies. Different teams within an organization might create and maintain separate glossaries.

Story

The Section 10Q Glossary contains business terms, categories, and policies that help employees of the organization look up the meaning of terms that they come across in financial reports and other documents.

Objectives

In this tutorial, you will accomplish the following tasks:

- Create a Section 10Q Glossary.
- Assign users to the glossary, and assign roles to the users.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the service administrator and glossary administrator.
- The users who access the glossary have accounts in Informatica Administrator.

Chapter two covers the prerequisites.

Task 1: Creating a Section 10Q Glossary

Log in as the service administrator to create a Section 10Q glossary. You must create the glossary before you can assign a glossary administrator to manage the glossary.

1. From the **New** menu, select **Glossary**.

   The glossary panel opens in the **Glossary** workspace.
2. In the **Name** property, enter `Section 10Q` as the name of the glossary as.
3. To complete the task, click **Save and Finish**. The Analyst tool creates a glossary and displays the glossary in read mode.

Task 2: Managing Users and Roles for the 10Q Glossary

Assigning the Glossary Administrator Role

Log in to the Analyst tool as the service administrator to assign the glossary administrator role to a user who manages users and roles and customizes the Section 10Q glossary.

1. From the **Manage** menu, click **Glossary Security**.
2. In the **Glossary Security** workspace, click the **Privileges** tab.

   The list of users and groups appears in the **Users and Groups** panel.
3. Select Business Glossary Administrator.
4. From the **Actions** menu, select **Add**.

   The **Add Privileges and Roles** wizard appears.
5. Select the Section 10Q glossary, and click **Next**.
6. Select the **Glossary Administrator** role.
7. Click **Save**.
8. In the **Glossary Security** workspace, click the **Permissions** tab.

   The list of users and groups appears in the **Users and Groups** panel.
9. Select BGGlossaryAdmin.
10. From the **Actions** menu, select **Add**.

    The **Add Permissions** wizard appears.
11. Select the Section 10Q glossary, and click **Next**.
12. Select the **Allow** permission to permit the user to view or edit the Glossary asset.
13. Click **Save**.

Assigning the Data Steward Role

Log in as the glossary administrator to assign a role to the user who is the data steward of the Section 10Q glossary and assets in the glossary.

1. In the **Glossary Security** workspace, click the **Privileges** tab.

   The list of users and groups appears in the **Users and Groups** panel.
2. Select Business Data Steward.
3. From the **Actions** menu, select **Add**.

   The **Add Privileges and Roles** wizard appears.
4. Select the Section 10Q glossary, and click **Next**.
5. Select the **Data Steward** role.
6. Click **Save**.
7. In the **Glossary Security** workspace, click the **Permissions** tab.

   The list of users and groups appears in the **Users and Groups** panel.
8. Select Business Data Steward.
9. From the **Actions** menu, select **Add**.

   The **Add Permissions** wizard appears.
10. Select the Section 10Q glossary, and click **Next**.
11. Select the **Allow** permission to permit the user to view or edit the Glossary asset.
12. Click **Save**.

Assigning the Stakeholder Role

Log in as the glossary administrator to assign a role to the user who is the stakeholder of the Section 10Q glossary and assets in the glossary.

1. In the **Glossary Security** workspace, click the **Privileges** tab.

   The list of users and groups appears in the **Users and Groups** panel.
2. Select Business Glossary Stakeholder.
3. From the **Actions** menu, select **Add**.

   The **Add Privileges and Roles** wizard appears.
4. Select the Section 10Q glossary and click **Next**.
5. Select the **Stakeholder** role.
6. Click **Save**.
7. In the **Glossary Security** workspace, click the **Permissions** tab.

   The list of users and groups appears in the **Users and Groups** panel.
8. Select Business Glossary Stakeholder.
9. From the **Actions** menu, select **Add**.

   The **Add Permissions** wizard appears.
10. Select the Section 10Q glossary, and click **Next**.
11. Select the **Allow** permission to permit the user to view or edit the Glossary asset.
12. Click **Save**.

Assigning Permissions and Privileges to the Owner

Log in as the glossary administrator to assign privileges and permissions to the user who is the owner of the Section 10Q glossary and assets in the glossary.

1. In the **Glossary Security** workspace, click the **Privileges** tab.

   The list of users and groups appears in the **Users and Groups** panel.
2. Select Business Glossary Owner.
3. From the **Actions** menu, select **Add**.

   The **Add Privileges and Roles** wizard appears.
4. Select the Section 10Q glossary and click **Next**.
5. Select the **Add Comments** and **View Drafts** privileges.
6. Click **Save**.
7. In the **Glossary Security** workspace, click the **Permissions** tab.

   The list of users and groups appears in the **Users and Groups** panel.
8. Select Business Glossary Owner.
9. From the **Actions** menu, select **Add**.

   The **Add Permissions** wizard appears.
10. Select the Section 10Q glossary, and click **Next**.
11. Select the **Allow** permission to permit the user to view or edit the Glossary asset.
12. Click **Save**.

Assigning Permissions and Privileges to the Glossary Consumer

Log in as the glossary administrator to assign privileges and permissions to the user who views the glossary content.

1. In the **Glossary Security** workspace, click the **Privileges** tab.

   The list of users and groups appears in the **Users and Groups** panel.
2. Select Business Glossary Consumer 1.
3. From the **Actions** menu, select **Add**.

   The **Add Privileges and Roles** wizard appears.
4. Select the Section 10Q glossary and click **Next**.
5. Select the **Add Comments** privilege.
6. Click **Save**.
7. In the **Glossary Security** workspace, click the **Permissions** tab.

   The list of users and groups appears in the **Users and Groups** panel.
8. Select Business Glossary Consumer 1.
9. From the **Actions** menu, select **Add**.

   The **Add Permissions** wizard appears.
10. Select the Section 10Q glossary, and click **Next**.
11. Select the **Allow** permission to permit the user to view or edit the Glossary asset.
12. Click **Save**.

Role and Privilege Relationship

Users can perform tasks in the Section 10Q glossary based on the roles and privileges you have assigned.

The following table lists the privileges that are associated with default roles:

Privilege	Glossary Administrator	Data Steward	Stakeholder
Assign Stewards	Yes	Yes	No
Administer Users	Yes	No	No
Add Comments	Yes	Yes	Yes
Assign Stakeholders	Yes	Yes	No
View Related Assets Links	Yes	Yes	Yes
Import and Export	Yes	No	No
Manage Initiative	Yes	No	No
Create Drafts	Yes	Yes	No
Edit Templates	Yes	No	No
View Drafts	Yes	Yes	Yes
Publish Glossary Assets	Yes	Yes	No
Delete Drafts	Yes	No	No

Task 3: Configuring a Section 10Q Glossary Properties

Log in as the glossary administrator to configure the Section 10Q glossary properties.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, under **Assets** click **Glossaries**.
3. Click Section 10Q glossary.

   The Analyst tool displays the glossary in the Glossary workspace.
4. Click **Edit**.

   The Analyst tool displays the glossary in edit mode.
5. In the **Description** property, `section 10Q is a comprehensive report of a company's performance that must be submitted quarterly by all public companies to the Securities and Exchange Commission. This glossary describes the terms used in the Section 10Q report` as the description.
6. In the **Owner** property, click **Browse** to select BGOwner as the owner of the glossary.
7. In the **Data Steward** property, click **Browse** to select BGStakeholder as the data steward for the glossary.

8. To complete the task, click **Save and Finish**. The Analyst tool updates the glossary and displays the glossary in read mode.

   Note: When you create new business assets in a glossary, the business assets inherit the owner and stewards users that a glossary administrator defines at the glossary level configuration.

CHAPTER 4

Lesson 3. Customizing the 10Q Glossary

This chapter includes the following topics:

- Customizing the 10Q Glossary Overview, 27
- Task 1: Creating a Custom Property, 28
- Task 2: Creating an Unidirectional Custom Relationship, 28
- Task 3: Creating a Bidirectional Custom Relationship, 29

Customizing the 10Q Glossary Overview

You can customize a glossary by editing the templates of the assets and business initiatives that are part of the glossary. Use the template to edit default properties, create properties, or change the sections where the properties appear.

Story

The organization customizes the Section 10Q glossary to include a custom property and custom relationship. The custom property captures the external source from which the definition of business terms is derived. The custom relationship links business terms using an attribute which the default template does not contain.

Objectives

In this tutorial, you will accomplish the following tasks:

- Create a custom property.
- Create a custom relationship.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the glossary administrator.
- You have created the Section 10Q glossary.

Task 1: Creating a Custom Property

Log in as a glossary administrator to create a business term property for the Section 10Q glossary. The property that you create is available across all glossaries.

1. Open the Section 10Q glossary.
2. Click **Edit** to edit the glossary.
3. Click the **Business Term Template** panel.
4. In the **Available Business Term Template Properties** panel, click the **Add** icon.
5. In the **Property Model** panel configure the properties as follows:

Property	Description
Name	Source
Description	Specify the source of the business term definition
Value	Single Value
Data Type	String
Search Rank	Medium

6. in the **Property Label Definition** panel configure the properties as follows:

Property	Action
Default Selection	Select **General** from the drop-down list.
Required	Select the checkbox.

7. Click **Save**.

Task 2: Creating an Unidirectional Custom Relationship

Log in as a glossary administrator to create a custom relationship in the glossary relationships page by specifying the glossary relationship as unidirectional. The data steward can use the custom relationship when configuring related terms in the business term.

1. In the Analyst tool header, open **Glossary Relationships** under **Manage**.
2. Click the **Add** icon.

   The **Create Custom Relationship** dialog box appears.
3. Clear the **Bidirectional Relationship** checkbox to enable unidirectional relationship.
4. For a unidirectional relationship, specify the name of the primary relationship as `Used By`.
5. Select the color of the line as `Red`.

The color of the line indicates what the Analyst tool uses to connect the related business terms in the relationship view diagram.

6. Click **OK**.

Task 3: Creating a Bidirectional Custom Relationship

Log in as a glossary administrator to create a custom relationship in the glossary relationships page by specifying the glossary relationship as bidirectional. The data steward can use the custom relationship when configuring related terms in the business term.

1. In the Analyst tool header, open **Glossary Relationships** under **Manage**.
2. Click the **Add** icon.

   The **Create Custom Relationship** dialog box appears.
3. Select the **Bidirectional Relationship** checkbox for a bidirectional relationship.
4. Specify the name of the primary relationship as `Used By`.
5. Specify the name of the derived relationship as `Derived From`.
6. You can define a color from **Line Color** list, select the color of the line as `Black`.

   The color of the line indicates what the Analyst tool uses to connect the related business terms in the relationship view diagram.
7. Click **OK**.

Part II: Publishing Business Glossary Content

This part contains the following chapters:

- Lesson 1: Creating and Publishing a Category, 31
- Lesson 2: Creating and Publishing a Policy, 34
- Lesson 3: Creating Business Terms, 37
- Lesson 4: Extending the Business Term, 40
- Lesson 5: Publishing a Business Term, 44
- Lesson 6: Creating and Publishing a Business Initiative, 46

CHAPTER 5

Lesson 1: Creating and Publishing a Category

This chapter includes the following topics:

- Creating and Publishing A Category Overview, 31
- Task 1: Creating a Category, 32
- Task 2: Proposing a Category, 32
- Task 3: Reviewing a Category, 33
- Task 4: Publishing a Category, 33

Creating and Publishing A Category Overview

A category is a descriptive classification of business terms and policies. Glossary consumers can browse categories in the Library workspace to view business terms and policies associated with the category.

Story

The organization creates a category called Financial Statements. The category helps Glossary consumers of the organization browse assets in the Library workspace.

Objectives

In this tutorial, you will accomplish the following tasks:

- Create a category called Financial Statements.
- Propose the category for review, and publish it after a review.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the data steward and stakeholder.
- The data steward and stakeholder have permissions to view and modify the Section 10Q glossary.

Task 1: Creating a Category

Log in to the Analyst tool as a data steward to create a category.

1. From the **New** menu, select **Category**.

   The **Select Glossary** dialog box opens.
2. Select the Section 10Q Glossary from the list next to **Select Glossary** and click **OK**.

   The category panel opens in the **Glossary** workspace.
3. Enter the following details:

Property	Action
Name	Specify `Financial Statements` as the name.
Description	Specify the description as follows: `Records that outline the financial activities of a business, an individual or any other entity. Financial statements are meant to present the financial information of the entity in question as clearly and concisely as possible for both the entity and for readers. Financial statements for businesses usually include: income statements, balance sheet, statements of retained earnings and cash flows, as well as other possible statements.`
Location	Select the glossary or category location where you want to create the `Financial Statements` category.
Owner	Click **Browse** and select BGOwner.
Data Steward	Click **Browse** and select BGSteward.
Stakeholder	Click **Browse** and select BGStakeholder.

4. To complete the task, choose **Save and Finish**. The Analyst tool creates a draft asset and displays the asset in read-only mode.

Task 2: Proposing a Category

Log in as the data steward to propose the Financial Statements category for review by the stakeholder.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, under the **Assets** panel, click **Categories**.
3. Select **Financial Statements** in the **Categories** panel.

   The Analyst tool displays the category in the Glossary workspace.
4. From the **Actions** menu, click **Propose for Review**.

   The stakeholder receives a notification after logging in to the Analyst tool.

Task 3: Reviewing a Category

Log in as the stakeholder to review the Financial Statements category.

1. In the Analyst tool header, click the notification icon.

   The Notifications panel appears.
2. In the notifications area, view the notification message.
3. Open the Financial Statements category from the **Library** workspace.
4. The Analyst tool displays the category in the **Glossary** workspace.
5. Click the **Add Comment** icon.

   The comments area opens.
6. Enter `Approved` as the comment, and click **Save**.

   The Analyst tool saves the comment.

Task 4: Publishing a Category

Log in as the data steward after the stakeholder reviews the category to publish the category. Glossary consumers can see published categories.

The category must be in the In Review phase before you can publish it.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Click the Financial Statements category.

   The Analyst tool displays the category in the Glossary workspace.
4. From the **Actions** menu, select **Publish**. The phase of the category changes to published.

CHAPTER 6

Lesson 2: Creating and Publishing a Policy

This chapter includes the following topics:

- Creating and Publishing a Policy Overview, 34
- Task 1: Creating a Policy, 35
- Task 2: Proposing a Policy, 35
- Task 3: Publishing a Policy, 36

Creating and Publishing a Policy Overview

Policies define the business purpose, process, or protocol that govern business practices that are related to business terms. Glossary consumers can view policies when they browse the glossary. Glossary consumers can open policies linked to a business term when they view the term to understand the business process or protocol that governs the term.

Story

The organization creates a policy called US GAAP to govern specific business terms. US GAAP is an industry standard policy helps companies take financial decisions.

Objectives

In this tutorial, you will accomplish the following tasks:

- Create a policy called US GAAP.
- Propose the policy for review, and publish it.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the data steward.
- The data steward and stakeholder have permissions to view and modify the Section 10Q glossary.

Task 1: Creating a Policy

Log in to the Analyst tool as a data steward to create a policy.

1. From the **New** menu, select **Policy**.

   The **Select Glossary** dialog box opens.
2. Select the Section 10Q Glossary from the list next to **Select Glossary** and click **OK**.

   The policy panel opens in the **Glossary** workspace.
3. Enter the following details:

Property	Value
Name	US GAAP
Description	Specify `Generally Accepted Accounting Principles (GAAP) is a framework of accounting standards, rules and procedures defined by the professional accounting industry, which has been adopted by nearly all publicly traded U.S. companies. For more information, see: http://en.wikipedia.org/wiki/Generally_Accepted_Accounting_Principles_%28United_States%29` as the description.
Owner	Click **Browse** and select BGOwner.
Data Steward	Click **Browse** and select BGSteward.
Stakeholder	Click **Browse** and select BGStakeholder.

4. To complete the task, choose **Save and Finish**. The Analyst tool creates a draft asset and displays the asset in read-only mode.

Task 2: Proposing a Policy

Log in as the data steward to propose the US GAPP policy for a review by the stakeholder.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, click Policies under **Assets**.
3. Click the US GAAP policy.

   The Analyst tool displays the policy in the Glossary workspace.
4. In the **Actions** menu, click **Propose for Review**.

   The stakeholder receives a notification after logging in to the Analyst tool. Optionally, you can log in as the stakeholder to review the asset.

Task 3: Publishing a Policy

Log in as the data steward after the stakeholder reviews the category to publish the policy. Glossary consumers can see published policies.

The policy must be in the In Review phase before you can publish it.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, **Policies** under **Assets**.
3. Click the US GAPP policy.

   The Analyst tool displays the policy in the Glossary workspace.
4. To publish the asset, from the **Actions** menu, select **Publish**. The phase changes to Published.

CHAPTER 7

Lesson 3: Creating Business Terms

This chapter includes the following topics:

- Creating a Business Term Overview, 37
- Task 1: Creating a Business Term, 38
- Task 2: Creating Additional Business Terms, 38

Creating a Business Term Overview

A business term is a word or phrase that uses business language to define relevant concepts for business users in an organization. A business term contains properties, such as name, description, and usage. Glossary consumers understand business concepts, requirements, and definitions from the information in the business term.

Story

The organization creates business terms which provide definitions in business language. Employees look up business terms in the glossary.

Objectives

In this tutorial, you will accomplish the following tasks:

- Create a business term called Balance Sheet.
- Create additional business terms.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the data steward and stakeholder.
- The data steward and stakeholder have permissions to view and modify the Section 10Q glossary.
- The category called Financial Statements and a policy called US GAAP exist in the glossary.

Task 1: Creating a Business Term

Log in to the Analyst tool as a data steward to create a business term. Initially, specify the basic properties for the business term. In another lesson, extend the business term properties by specifying relationships, synonyms, and links.

1. From the **New** menu, select **Business Term**.

   The **Select Glossary** dialog box opens.

2. Select the Section 10Q Glossary from the list next to **Select Glossary**, and click **OK**.

   The business term panel opens in the **Glossary** workspace.

3. Enter the following details:

Property	Action
Name	Specify `Balance Sheet` as the name.
Categories	Click **Add** from the **Actions** menu and select the Financial Statements category.
Source	Select **Internal** as the source.
Rules	Click **Create Rule from Policy** from the **Actions** menu. Select the US GAAP policy and click **OK**.
Owner	Click **Browse** and select BGOwner.
Data Steward	Click **Browse** and select BGSteward.
Stakeholder	Click **Browse** and select BGStakeholder.

4. To complete the task, choose **Save and Continue**. The Analyst tool creates a draft asset and displays the asset in read-only mode.

Task 2: Creating Additional Business Terms

Log in to the Analyst tool as a data steward to create additional business terms.

Create additional business terms with the following properties in the Section 10Q glossary:

Business Term Name	Description
Income Statement	One of the financial statements of a company that shows the company's revenues and expenses during a particular period.
Cash Flow Statement	A financial statement that shows how changes in balance sheet accounts and income affect cash and cash equivalents, and breaks the analysis down to operating, investing and financing activities.
Net Income	An entity's income after cost of goods sold, expenses and taxes for an accounting period is deducted.

Business Term Name	Description
Net Sales	The amount of sales generated by a company after the deduction of returns and allowances for damaged or missing goods and any discounts allowed.
Gross Income	Receipts and gains from all sources.

The business terms that you create are in the draft phase. You can use a business initiative to publish them in bulk.

CHAPTER 8

Lesson 4: Extending the Business Term

This chapter includes the following topics:

- Extending the Business Term Overview, 40
- Task 1: Specifying a Synonym, 41
- Task 2: Linking Business Terms with a Default Relationship, 41
- Task 3: Linking Business Terms with a Custom Relationship, 42
- Task 4: Creating a Rule Intent to a Business Term, 42
- Task 5: Creating a Rule from a Rule Specification, 43

Extending the Business Term Overview

You can extend the description of a business term by adding synonyms and linking other business terms using default and custom relationships. You can also assign a policy to a business term so that Glossary consumers understand the rule intent that governs the business term. You can also link a rule to a rule specification.

Story

The organization wants to specify extended properties for a few of the business terms. Specifying additional information provides Glossary consumers a better understanding of the term.

Objectives

In this tutorial, you will accomplish the following tasks:

- Specify a synonym for the term Net Income.
- Edit the business term called Income Statement and link it to the term Net Income using a default relationship.
- Edit the business term called Net Income and link it to the term Gross Income using a default relationship.
- Create a rule intent and assign a policy.
- Create a rule specification for a rule.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- The business terms Net Income, Income Statement, and Gross Income exist in the Section 10Q glossary.
- You have created a custom relationship called Used By.
- You have access to the Design workspace.

Task 1: Specifying a Synonym

Log in as the data steward to specify a synonym to the business term Net Income by editing the business term.

1. Open the Net Income business term from the **Library** workspace, and click **Edit**.

   The business term opens in edit mode in the **Glossary** workspace.
2. In the **Synonyms** property, from the **Actions** menu, click **Add**.

   The **Add Synonym** dialog box opens.
3. Specify `Bottom-Line` as the **Name** of the synonym.
4. In the **Context** property, specify the description as, `Bottom line sometime refers to a company's net earnings, net income, or earnings per share (EPS).`
5. In the **Create Date** property, specify the current date. In the **Retirement Date** property, specify a date 5 months after the current date.

   The period between the create date and retirement date is to indicate when the synonym is active in the glossary. The status of the synonym is **Active** until the retirement date.
6. Click **OK** to add the synonym.

   The Analyst tool adds the synonym to the business term.

Task 2: Linking Business Terms with a Default Relationship

Log in as the data steward to link the business term Income Statement with the term Net Income using a default relationship. We use the **Contains** relationship because the definition of Income Statement contains the term Net Income.

1. Open the business term, Income Statement, from the **Library** workspace and click **Edit**.

   The business term opens in edit mode in the **Glossary** workspace.
2. In the Contains property, click **Browse** and select the Net Income business term.
3. To complete the task, choose **Save and Finish**.

   Income Statement is now linked to Net Income with a **Contains** relationship. You can view this relationship when you open the relationship diagram.

4. Repeat steps 1 through 3 to create default relationships between the following business terms:

Term One	Term Two	Relationship
Net Sales	Gross Income	Calculated From
Income Statement	Net Sales	Contains
Income Statement	Gross Income	Contains
Net Income	Gross Income	Used By

Task 3: Linking Business Terms with a Custom Relationship

Log in as the data steward to link the business term Net Income with the term Gross Income using a custom relationship called **Used By**.

1. Open the business term Net Income from the **Library** workspace.

   The business term opens in edit mode in the **Glossary** workspace.
2. Click **Edit**.
3. In the **Related Assets** section, in the **Related Terms** property, click **Add** from the **Actions** menu. Select the business term Gross Income and change the relationship to **Used By**.
4. To complete the task, choose **Save and Finish**.

Task 4: Creating a Rule Intent to a Business Term

Create a rule intent to assign a policy to a business term.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. In the **Assets** section, select the Income Statement business term.
4. To edit the business term, click **Edit**.
5. In the **Rules** property, select **Create New Rule** from the **Actions menu**.
6. Configure the following properties:

Property	Description
Name	Rule Intent for Income Statement
Rule Intent	Revenue is recognized as recommended in US GAAP.

7. Click **Save**.

8. Click **Save and Finish**.

Task 5: Creating a Rule from a Rule Specification

Create a rule specification from the business term.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. In the **Assets** section, select Income Statement.
4. To edit the business term, click **Edit**.
5. In the **Rules** property, click the **Add** icon in the **Assets** column.

   The **Design** workspace opens.
6. Configure the rule specification properties as follows:

Property	Action
Rule specification name	Enter `Rev_Rec_Method` as the name.
Rule specification description	Enter `Rev Rec Method rule spec` as the description.
Location	Click **Browse** and select a location for the rule spec.

7. Click **Save**.

CHAPTER 9

Lesson 5: Publishing a Business Term

This chapter includes the following topics:

- Publishing a Business Term Overview, 44
- Task 1: Proposing a Business Term, 44
- Task 2: Publishing a Business Term, 45

Publishing a Business Term Overview

You can publish one business term or group many business terms into a business initiative and publish them in bulk. In this lesson, you will publish a single business term.

Objectives

In this tutorial, you will accomplish the following tasks:

- Propose a business term for review.
- Publish the business term after a review by the stakeholder. Approving the business term by logging in as the stakeholder is an optional task.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the data steward.
- The assets that you need to publish are in draft state.
- The data steward has the permission to view and edit the Section 10Q glossary.

Task 1: Proposing a Business Term

Log in as the data steward to propose the Balance Sheet category for review by the stakeholder.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, click **Assets**.

3. Click Balance Sheet.

   The Analyst tool displays the business term in the Glossary workspace.

4. In the **Actions** menu click **Propose for Review** .

   The phase of the term changes to In Review. The stakeholder receives a notification after logging in to the Analyst tool. Optionally, you can log in to the Analyst tool as the stakeholder to view the notification and approve the business term.

Task 2: Publishing a Business Term

Log in as the data steward after the stakeholder reviews the business term to publish the business term. Glossary consumers can view published business terms.

The business term must be in the In Review phase before you can publish it.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Click the Balance Sheet business term.

   The Analyst tool displays the business term in the Glossary workspace.

4. To publish the asset, from the **Actions** menu, select **Publish**. The phase changes to published.

CHAPTER 10

Lesson 6: Creating and Publishing a Business Initiative

This chapter includes the following topics:

- Creating and Publishing a Business Initiative Overview, 46
- Task 1: Creating a Business Initiative, 47
- Task 2: Proposing a Business Initiative, 47
- Task 3: Publishing a Business Initiative, 47

Creating and Publishing a Business Initiative Overview

A business initiative is a type of asset to which you can add other Glossary assets. You can use business initiatives to track changes that you need to make to multiple Glossary assets. Create a business initiative when a business decision or business change has an impact on multiple Glossary assets. You can make changes to the affected assets and publish them in bulk by publishing the business initiative.

Story

The organization needs to publish all the Glossary assets that they have created when developing the Section 10Q glossary. They create a business initiative to publish all the assets which are in the draft phase at one. The business initiative description captures the reason for publishing the assets in bulk.

Objectives

In this tutorial, you will accomplish the following tasks:

- Create a business initiative and add assets that need to be published in bulk.
- Propose the business initiative for review and publish the initiative.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the data steward.
- The data steward has the permissions to view and modify the Section 10Q glossary.
- The assets that you need to publish are in draft state.

Task 1: Creating a Business Initiative

Log in as the data steward to create a business initiative to publish the business terms which are in the draft phase in bulk.

1. From the **New** menu, select **Business Initiative**.

   A business initiative opens in the **Glossary** workspace in edit mode.
2. In the Name property, specify the name of the business initiative as `Section 10Q Bulk Publish`.
3. In the **Assets Collection** section, from the **Actions** menu, click **Add**.
4. In the **Assets** dialog box, select the draft business terms from the Section 10Q glossary.
5. To complete the task, choose **Save and Finish**. The Analyst tool creates a draft business initiative and displays the initiative in the read-only mode.

Task 2: Proposing a Business Initiative

Log in as the data steward to propose the business initiative for review.

The Glossary assets in the business initiative must be in the Draft phase before you can propose the asset for review.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Select the Section 10Q Bulk Publish business initiative.

   The Analyst tool displays the business initiative in the Glossary workspace.
4. From the **Actions** menu, select **Propose for review**.

   The phase changes to In Review. The stakeholder receives a notification indicating that the business initiative is ready for review. Optionally, you can log in to the Analyst tool as the stakeholder to view the notification and approve the business initiative.

Task 3: Publishing a Business Initiative

Log in as the data steward to publish the business initiative. After you publish the business initiative, the phase of the assets which are part of the business initiative also changes to published.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Click the Section 10Q Bulk Publish business initiative.

   The Analyst tool displays the business initiative in the Glossary workspace.
4. From the **Actions** menu, select **Publish**. The phase of the business initiative and the assets contained in the initiative changes to published.

Part III: Viewing Assets

This part contains the following chapters:

- Lesson 1: Viewing Assets in Informatica Analyst, 49
- Lesson 2: Viewing Assets in Business Glossary Desktop, 52

CHAPTER 11

Lesson 1: Viewing Assets in Informatica Analyst

This chapter includes the following topics:

- Viewing Assets in Informatica Analyst Overview, 49
- Task 1: Viewing Asset Properties, 50
- Task 2: Adding a Comment, 50
- Task 3: Following a Term, 50
- Task 4: Searching for Assets, 51

Viewing Assets in Informatica Analyst Overview

You can browse Business Glossary from the **Library** workspace to look for business initiatives, business terms, categories, glossaries, and policies. You can find assets based on the asset type, glossary, or system-defined tags associated with the assets. You can search for assets or apply filters to the assets in the asset list. You can also sort or group the assets to refine the asset list. You can open an asset from the **Library** workspace and view the asset details and relationships in the **Glossary** workspace. You can track changes to an asset through notifications and by viewing the history of changes.

Story

The organization has a few employees who need to view extended business term properties. These employees use the Analyst tool to view Glossary assets.

Objectives

In this tutorial, you will accomplish the following tasks:

- Open the Library workspace to look up assets.
- Use the search option to look up assets.
- View the asset relationship diagram.
- Add a comment to a term.
- Follow and unfollow a business term.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the Glossary consumer.

- The business terms in the Section 10Q glossary are published.

Task 1: Viewing Asset Properties

Log in to the Analyst tool as the Glossary consumer to view assets and their properties.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, click **Assets**.
3. Under **Business Terms**, click Income Statement.

   The Analyst tool displays the business term properties in the **Glossary** workspace.
4. Click **View History**.

   The Analyst tool displays the history of tasks performed on the business term.
5. Click the **Relationships View** tab.

   You can see a visual representation of all the assets that are related to the asset that you opened.

Task 2: Adding a Comment

You can add, view, and search comments associated with a Glossary asset. For this task, we will log in as the Glossary consumer to add comments to a business term.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, click **Assets**.
3. Click Income Statement.

   The Analyst tool displays the business term in the **Glossary** workspace.
4. Click the **Add Comment** icon near the **Actions** menu.
5. Enter `Income statement definition needs an example.` as a comment, and click **Save**.
6. To view the comment you added, click the **Comments** link in the bottom of the business term page.

   The data steward receives a notification when you add a comment.

Task 3: Following a Term

You can follow business terms, business initiatives, categories, and policies that are of interest to you to track any change to these assets. Assets that you follow are tagged and you can view them in the Tags panel. In addition, the Analyst tool sends you notification alerts when other users modify the assets that you follow.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, click **Assets**.
3. Click Income Statement.

The Analyst tool displays the category in the **Glossary** workspace.

4. From the Actions menu in the business term panel, select **Follow**.

   You are now following the term. Repeat the tasks 1 through 4 to unfollow the term. When the data steward updates the term properties, you will receive a notification.

Task 4: Searching for Assets

You can search for assets in the Analyst tool. The Analyst tool retrieves the search results from the assets in the glossaries.

1. in the Analyst tool header, enter Income Statement in the search box, and press enter.

   The search panel appears at the bottom. The business term you have looked up, and related assets are displayed in the search results.

2. From the search results displayed, click Income Statement.

   The business term page appears in the Glossary workspace.

CHAPTER 12

Lesson 2: Viewing Assets in Business Glossary Desktop

This chapter includes the following topic:

- Viewing Assets in Business Glossary Desktop, 52

Viewing Assets in Business Glossary Desktop

As a glossary consumer, look up a business term in the Business Glossary Desktop application to get context and meaning for the business term. Open the term in the Analyst tool to view additional details. Before you perform this task, ensure that you have the Business Glossary Desktop application running.

1. Open Business Glossary Desktop, and enter Income Statement in the search box.

   The Business Glossary Desktop Client returns a list of business terms with names or descriptions that matches the search text.

2. Optionally, highlight the term in a document which contains the word Income Statement. Use `Ctrl+Shift+Q` to launch the Business Glossary Desktop client directly the external application.

   The Business Glossary Desktop displays a list of business terms that match the term.

3. Select Income Statement from the results to view the term details.

   You can view the business term definition.

4. Click the **View in Analyst** icon to open the business term in the Analyst tool.

   The Analyst tool web URL opens in your default browser.

5. Log in the Analyst tool to view additional details about the business term.

APPENDIX A

Asset Linking

This appendix includes the following topics:

- Creating Asset Links Overview, 53
- Task 1: Creating a Business Glossary Resource, 53
- Task 2: Creating Relationships to Metadata Objects, 55

Creating Asset Links Overview

To view the metadata that a category or business term represents, relate the category or business term to another catalog object. This is an optional lesson with generic steps. You log in to Metadata Manager to perform the tasks.

Metadata Manager extracts published business terms and categories from an Analyst tool business glossary. After you create a relationship between a business term or category and a metadata object, Metadata Manager updates the relationship information in the Analyst tool business glossary.

Task 1: Creating a Business Glossary Resource

Create a Business Glossary resource to extract metadata from an Analyst tool business glossary.

1. On the **Load** tab, click **Actions** > **New Resource**.

   The **Resource Selection** window appears.
2. Click **Business Glossary** > **Business Glossary**.
3. Click **Next**.

   The **Properties** page appears.

4. Enter the following information:

Property	Description
Name	Name for the resource. The resource appears in the **Resources** panel with this name. The name must be unique and have from one through 256 characters. It cannot include the following characters: `/ \ : * ' ? " < > | [ ]`
Description	Description for the resource. Description cannot exceed 4000 characters.

Note: The business glossary resource name should match the Analyst tool glossary name. If the names do not match, the related terms for a business term do not appear in the Metadata Manager business glossary.

5. Click **Next**.

   The **Configuration** page appears.

6. Enter the connection properties.
7. Click **Test Connection** to test the connection to the source system.

   If Metadata Manager cannot connect to the source system, an error message appears. Correct any error and test the connection again.

8. Click **Next**.

   The **Enumerated Links** window appears.

9. Optionally, add or upload the files that contain enumerated links information:
   - Add enumerated links files when you store the files in a directory that the Metadata Manager web application can access and the files change.
   - Upload enumerated links files when the files do not change. Metadata Manager uploads the files into the Metadata Manager repository.
10. Update the file properties for each enumerated links file, if required.
11. Click **Next**.

    The **Schedules** window appears.

12. To add a schedule, select **Attach a Schedule** and select a schedule in the **Schedule** list.

    If you have not created a schedule, you can assign a schedule to a resource after you create the resource.

13. Click **Finish**.

The resource appears in the **Resources** panel on the **Load** tab.

Business Glossary Connection Properties

Update the connection properties when you create or edit a Business Glossary resource.

The following table describes the connection properties:

Property	Description
User name	Name of the user account used to connect to the Analyst tool.
Password	Password for the user account used to connect to the Analyst tool.
Security domain	Name of the security domain to which the Analyst tool user belongs. If the domain uses LDAP authentication or Kerberos authentication, enter the security domain name. Otherwise, enter `Native`.
Host	Fully qualified host name of the machine where the Analyst tool runs.
Port	Analyst tool port number.
Business glossary	Name of the Analyst tool business glossary from which you want to extract metadata. Each resource can extract metadata from one business glossary.

Task 2: Creating Relationships to Metadata Objects

Create relationships from business terms to metadata objects in the Details panel of the **Glossary** view.

1. From the Show list in the **Glossary** view, select a business glossary.
2. Select the business term.
3. In the Details section, click **Edit** under **Related Catalog Objects**.

   The **Edit Related Catalog Objects** window appears.
4. In the **Catalog** view, select a metadata object.
5. Drag the business term into the **Edit Related Catalog Objects** window.
6. To remove a relationship, select the metadata object in the **Edit Related Catalog Objects** window and click **Remove**.

   If a business term is related to a reusable PowerCenter object, you can delete the relationship to the reusable object. Metadata Manager removes the associations to all instances of the object. However, you cannot delete the relationship for a single instance of the object.
7. Click **OK**.

APPENDIX B

Publishing Business Glossary Content using the Approval Workflow

This appendix includes the following topics:

- Advanced Approval Workflow Overview, 56
- Task 1: Configuring the Advanced Approval Workflow, 57
- Task 2: Creating a Business Term, 58
- Task 3: Proposing a Business Term for an Advanced Approval Workflow Process , 59
- Reviewing a Business Term , 59
- Task 4: Performing Level 1 Voting, 60
- Task 5: Performing Level 2 Voting, 60
- Task 6: Concluding the Voting Process and Publishing a Business Term , 61

Advanced Approval Workflow Overview

The approval workflow process routes a glossary asset to approvers who can vote for or against the asset changes.

A Glossary administrator configures the approval workflow process for a glossary. After the Glossary administrator configures the approval workflow, a data steward publishes or rejects all the new assets in the glossary after the voting process.

The approval workflow consists of two levels of voting. Level 1 approvers are the default approvers, such as asset owners, asset stakeholders, and stewards of related assets. Level 2 approvers are additional approvers apart from the default level 1 approvers.

A Glossary administrator can configure level 1 approvers from the default approvers list. Glossary administrator can either select asset owners and asset stakeholders as level 1 approvers or can select asset owners, asset stakeholders, and stewards of related assets as level 1 approvers. For level 2 approvers, the Glossary administrator can add approvers from a list of users after enabling level 2 voting.

Story

The glossary administrator configures an approval workflow for a glossary. A data steward creates business terms within a glossary that has configured approval workflow and publishes or rejects the business terms after an approval workflow process.

Objective

In this tutorial, you will accomplish the following tasks:

- Edit a glossary called Section 10Q and configure the approval workflow.
- Create a business term called Equity Statement.
- Propose the business term for an approval workflow process.
- Review the business term.
- Publish the business term after the review.

Prerequisites

Before you start this lesson, verify the following prerequisites:

- You have the credentials to log in as the glossary administrator, data steward, approvers, and stakeholder.
- The glossary administrator has permissions to view and edit the Section 10Q glossary.
- The Data Integration Service is configured.
- The level 1 and level 2 applications are running.
- The email service is configured, so that the approvers receive email notifications.

Task 1: Configuring the Advanced Approval Workflow

Log in to the Analyst tool as the glossary administrator to configure the Section 10Q glossary for an approval workflow.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, under the **Assets** panel, click **Glossaries**.
3. Select the Section 10Q glossary in the **Glossaries** panel.

   The Analyst tool displays the glossary in the Glossary workspace.
4. Click **Edit**.

   The Analyst tool displays the glossary in edit mode.
5. Click **Asset Approval Configuration** to configure the approval workflow.

   The Analyst tool displays the Asset Approval Configuration settings.
6. Select the **Asset Owners**, **Asset Stateholders**, and **Stewards of Related Assets** as default approvers for the Section 10Q glossary assets. Default approvers are the level 1 approvers.
7. Select the **Enable Voting for Asset Changes** option to enable the level 1 approval.

   Configuration settings for level 1 approvers appear.
8. In the Settings for Level 1 Approvers, select the **Voting Reminder Before End Time** as `2 Days` and **Escalation Interval Before End Time** as `1 Day` for level 1 approvers.
9. Select the **Enable Level 2 Voting** option to enable the level 2 approval.

   Configuration settings for level 2 approvers appear.

10. Click **Add level 2 approvers** to add additional approvers. The **Add Approvers** window appears.
11. In the **Add Approvers** window, select `BG_Approver1` and `BG_Approver2` as level 2 approvers from the list of users, and then click **OK**.
12. In the Settings for Level 2 Approvers, select the **Voting Reminder Before End Time** as `2 Days` and **Escalation Interval Before End Time** as `1 Day` for level 2 aprovers.
13. Click **Save and Finish** to complete the task.

    The Analyst tool updates and configures the approval workflow for the Section 10Q glossary.

Task 2: Creating a Business Term

The data steward creates a business term. The data steward then proposes the business term for an approval workflow process.

Log in to the Analyst tool as a data steward to create a business term.

1. Select **Business Term** from the **New** menu.

   The **Select Glossary** window appears.
2. Select the Section10Q glossary from the select glossary list, and then click **OK**. The business term opens in the Glossary workspace.
3. Enter the following details for the business term:

Property	Action
Name	Specify name as `Equity Statment`.
Categories	Click **Add** from the **Actions** menu and select Financial Statements as the category. Click **OK**.
Source	Specify source as **External**.
Owner	Click **Browse** and select BGOwner. Click **OK**.
Data Steward	Click **Browse** and select BGSteward. Click **OK**.
Stakeholder	Click **Browse** and select BGStakeholder. Click **OK**.
Description	Enter `Reports on the changes in equity of the company during the stated period.` as the description.
Related Terms	Click **Add** form the Actions menu and select Statement of Retained Earnings as the related term. Click **OK**.

4. To complete the task, select **Save and Finish**.

   The Analyst tool displays the business term in the Glossary workspace.

Task 3: Proposing a Business Term for an Advanced Approval Workflow Process

As a data steward, you can propose a business asset for an approval when the business term is in Draft phase. When you propose a business asset for an approval, the phase of the business asset changes to In Review.

Log in to the Analyst tool as a data steward to propose the business term for an approval workflow process.

1. In the Library Navigator, under the **Assets** panel click, **Business Terms**.
2. Select **Equity Statement** in the **Business Terms** panel.

   The Analyst tool displays the business term in the Glossary workspace.
3. To propose the term for a voting process, from the **Actions** Menu, click **Start Voting Process**.

   The **Start Voting Process** window appears.
4. Enter the following details in the **Start Voting Process** window:

Property	Action
Asset Change Description	Enter `Business Term for your review`.
Level 1 Voting Ends Time	Specify the level 1 voting end time. For example, select date as `17 June, 2016` and time as `12:00 AM`.
Level 2 Voting Ends Time	Specify the level 1 voting end time. For example, select date as `18 June, 2016` and time as `12:00 AM`.
Default Approvers	View default approvers that have been selected for the Section 10Q glossary assets.
Additional Approvers	Specify additional level 1 approvers. Click the **Actions** icon and select **Add**. The **Add Approvers** window appears. In the **Add Approvers** window select `BG_Approver4` and `BG_Approver5` as additional approvers, and then click **OK**.

5. Click **OK** to start the voting process.

   The phase of the business term changes from Draft to In Review.

   Note: When you set the level 1 voting end time, you must specify a future date. When you set the level 2 voting end time, you must specify a date greater than the level 1 voting end time.

Reviewing a Business Term

As an approver, you receive a notification in the Analyst tool or an email notification to review and vote for a business term.

The review phase consists of two levels of voting. Level 2 voting starts after the level 1 voting is complete. You must vote for a business term before the approval workflow end time. You can delegate your vote to another user or user group if you have not approved, rejected, or abstained the business term.

Task 4: Performing Level 1 Voting

As a level 1 approver, you can view the pending voting tasks in the **My Tasks** panel in the Start workspace. You can vote only before the approval workflow end time. You also receive a notification in the Analyst tool or an email notification.

Log in to the Analyst tool as a level 1 approver to vote for the business term.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, click **Assets**.
3. Select **Equity Statement** in the **Business Terms** panel. The business term opens in the glossary workspace.
4. Click the voting icon. The **Voting Page** panel appears.
5. In the Voting Page, choose to vote for the business term or delegate the vote.
   - To vote for the business term, select **Approve**, **Reject**, or **Abstain**.
   - To delegate the vote, click **Delegate** before you approve, reject, or abstain the business term.
6. Select **Approve** to approve the Equity Statement business term.
7. In the **Comment** field, add a comment.
8. Click **Submit** to complete voting.

   The Analyst tool updates the voting history for the business term.

Task 5: Performing Level 2 Voting

As a Level 2 approver, you can vote for the business term after the level 1 voting is complete. Level 2 approvers also receive a notification in the Analyst tool and an email notification to vote.

Log in to the Analyst tool as a level 2 approver to complete the voting process for the business term.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, click **Assets**.
3. Select **Equity Statement** in the **Business Terms** panel . The business term opens in the glossary workspace.
4. Click the voting icon. The **Voting Page** panel appears.
5. In the Voting Page **Level 2** tab, choose to vote for the business term or delegate the vote.
   - To vote for the business term, select **Approve**, **Reject**, or **Abstain**.
   - To delegate the vote, click **Delegate** before you approve, reject, or abstain the business term.
6. Select **Approve** to approve the Equity Statement business term.
7. In the **Comment** field, add a comment.
8. Click **Submit** to complete voting.

   The Analyst tool updates the voting history for the business term.

Task 6: Concluding the Voting Process and Publishing a Business Term

After the level 2 voting process is complete, the data steward can publish or reject the business term to conclude the voting process after examining the status of the approval process.

Log in to the Analyst tool as a data steward to conclude the voting process and publish the business term.

1. Click **Open** to open the Library workspace.
2. In the Library Navigator, click **Assets**.
3. Select the Equity Statement business term. The Analyst tool displays the business term in the Glossary workspace.
4. Click the voting icon to open the voting page. The **Voting Page** panel appears.
5. In the **Voting Page**, click **Conclude Voting**. The Analyst tool displays the **Conclude Voting** dialog box.
6. From the **Conclude Voting** dialog box, select **Publish Asset**.
7. Click **OK** to complete the task.

   The Analyst tool changes the business term status to Published.

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