



Informatica®

10.2.1

# Business Glossary Guide

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# Preface

The *Business Glossary Guide* is written for administrators, data stewards, business owners, subject matter experts, business users, and business analysts who read and manage a business glossary. It contains information you need to look up content, create, and manage business glossaries and relate the information between glossary content.

The *Business Glossary Guide* assumes you have a working knowledge of the data for your organization.

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If you are an Informatica Network member, you can use Online Support at <http://network.informatica.com>.

# CHAPTER 1

## Introduction to Business Glossary

This chapter includes the following topics:

- [Informatica Business Glossary Overview, 11](#)
- [Glossary Structure, 12](#)
- [Business Glossary Users, 14](#)
- [Business Glossary Interface, 16](#)
- [Business Glossary Access, 17](#)

### Informatica 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, policies, and categories 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.

#### Example

Business users in the sales department of an organization use business language in marketing collaterals and customer interactions. The business users need to use consistent, accurate, and traceable business terms that are easy to look up. Some of the users are business analysts who need to understand the relationship between business and technical metadata.

You assign a data steward to the sales glossary who creates and maintains the Glossary assets. The data steward interacts with subject matter experts in the sales department to define business terms and policies. The data steward categorizes the business terms and policies to make it easy for the business users to find content. The Glossary assets go through an approval before the data steward publishes the assets.

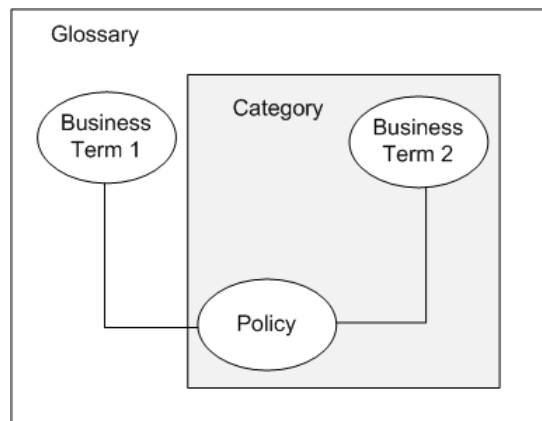
Business users can browse the categories in the Analyst tool or search the glossary to look up business terms. The users can view related terms, refer policies that govern the terms, and see linked data assets and rule assets to understand technical metadata related to the term.

## Glossary Structure

Business terms, categories, policies, and glossaries are assets that constitute the structure of Business Glossary. Create Glossary assets to define and describe business concepts that are important to your organization. You can establish relationships between Glossary assets.

In addition to business terms, categories, and policies you can create business initiatives. A business initiative is a type of asset that contains business terms, categories, and policies which are impacted by a business decision or business change. The data steward can publish the business initiative to publish all the business terms, categories, and policies that are part of the initiative.

The following image shows Glossary assets and their relationships:



You can create the following Glossary assets:

### **Glossary**

A collection of business initiatives, business terms, categories, and policies. Different teams within an organization might create and maintain separate glossaries, such as Finance and Human Resources.

### **Category**

A descriptive classification of business terms and policies. Create a category to group related business terms and policies in a glossary. Users can search for business terms and policies within categories. For example, you might create a category called "Account Status" and associate the terms "delinquent account" and "canceled account" with it.

### **Business term**

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. Optionally, you can associate a business term with a category. A business term can also contain relationships to other

business terms or assets. For example, you might create a relationship between the terms "past due" and "grace period."

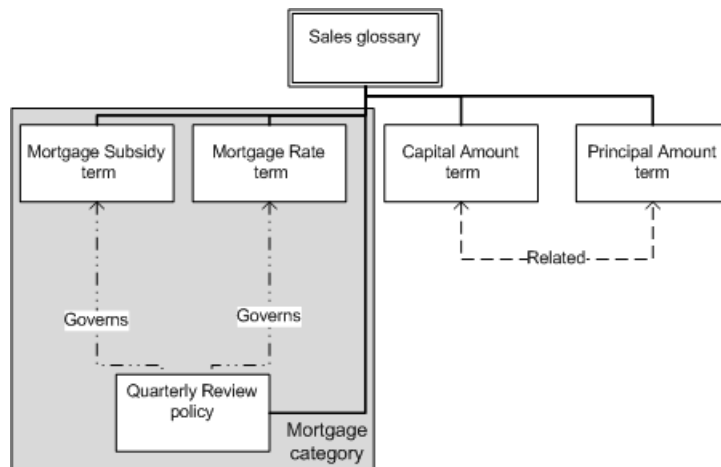
### Policy

The business purpose, process, or protocol that governs business practices that are related to business terms. For example, a retail store might create a policy called "Rewards" that describes the policy for sending reward vouchers to different levels of customer. You assign the policy to the terms "Gold customer," "Silver customer," and "Bronze customer."

## Glossary Structure Example

You work for a construction organization that uses Business Glossary. The Sales and Human Resources business units need glossaries to define business terms and policies related to their business unit. The glossaries will be accessible to users based on their business unit.

The following image shows the structure of the glossary that the Sales team created:



The Sales business unit identified terms, such as capital amount and principal amount, that it wants to store in a glossary. The Sales business unit creates the following Glossary assets:

### Sales glossary

The administrator creates a Sales glossary to contain terms and policies related to construction sales operations. Access to the glossary is restricted to individuals within the Sales business unit.

### Mortgage category

A data steward creates the Mortgage category that data stewards can associate with mortgage terms. You can browse the Mortgage category to find terms and policies related to mortgage.

### Review policy

The Review policy mandates that mortgage data be reviewed every quarter. The review policy governs mortgage rates and mortgage subsidies. A data steward can associate mortgage terms with the policy.

## Business terms

The following table describes relationships and associations for terms in the Sales glossary:

Term	Relationships and Associations
Mortgage subsidy	Consider the following relationships and associations: <ul style="list-style-type: none"><li>- Associated with the Mortgage category. When you browse the Mortgage category you can find terms related to mortgage, including "mortgage subsidy" and "mortgage rate."</li><li>- Governed by the Review policy. When you look up the "mortgage subsidy" term, you can view policies associated with mortgage, including the Review policy.</li></ul>
Mortgage rate	Consider the following relationships and associations: <ul style="list-style-type: none"><li>- Associated with the Mortgage category. When you browse the Mortgage category you can find terms related to mortgage, including "mortgage subsidy" and "mortgage rate."</li><li>- Governed by the Review policy. When you look up the "mortgage rate" term, you can view policies associated with mortgage, including the Review policy.</li></ul>
Capital amount	Contains a defined relationship to "principal amount." When you look up "capital amount," you can get access to "principal amount" through a link.
Principal amount	Contains a defined relationship to "capital amount." When you look up "principal amount," you can get access to "capital amount" through a link.

# Business Glossary Users

A glossary can have different types of users. The different types of users interact differently with the glossary.

Users can use business glossary in the following ways:

- Administering users and managing glossaries
- Creating and managing content
- Reading content

## Glossary Administrators

To manage glossaries, Business Glossary administrators change business initiative, business term, category and policy templates and control the tasks that users can perform.

The following types of administrators manage glossaries users and roles:

### 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

Different users collaborate to publish Glossary assets.

The following users are responsible to create, approve, and manage 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 complete 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.

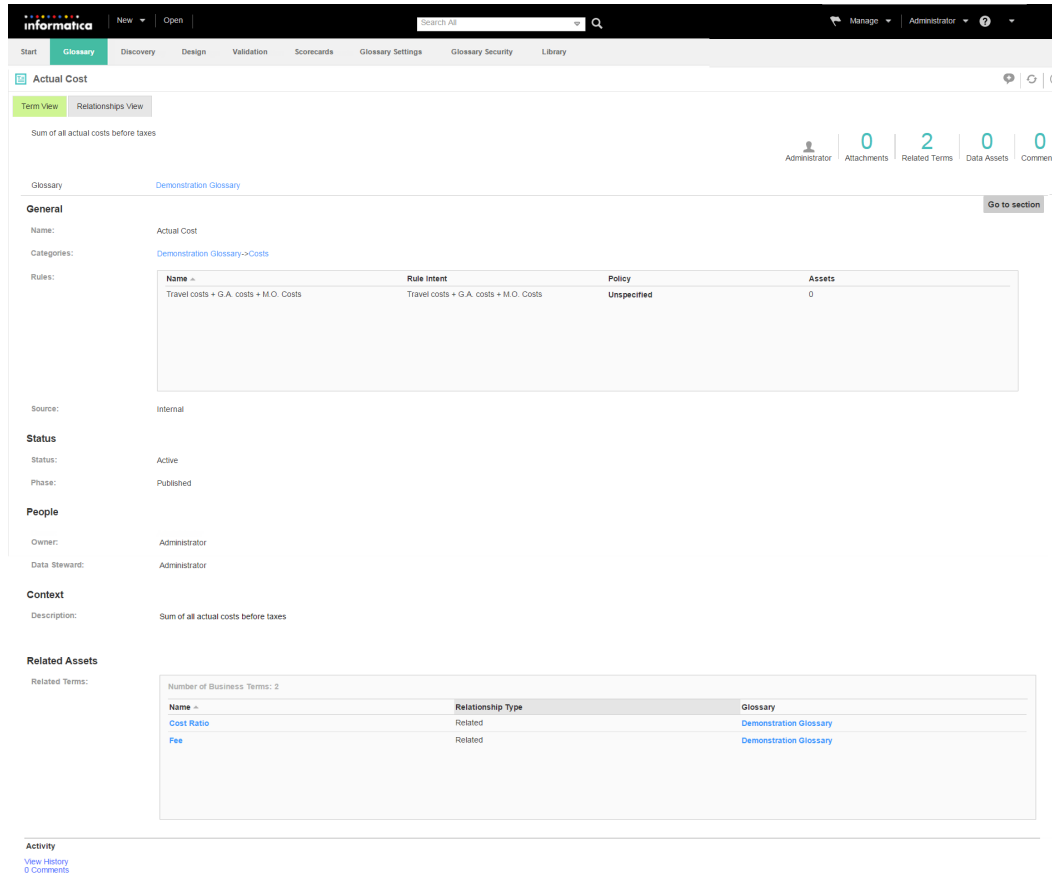
## Glossary Consumers

Consumers are readers of Glossary assets. Consumers do not participate in content creation, but look up Glossary assets.

# Business Glossary Interface

Use workspaces and panels in the Business Glossary interface to view and manage notifications, glossaries and Business Glossary assets.

The following image shows the Business Glossary interface:



The following workspaces and panels appear in the interface:

## Glossary workspace

View and edit assets.

## Library workspace

View assets, search for assets, and view collections.

## Glossary Security workspace

Assign permissions, privileges, and roles to users and groups. Administrators allow access to a user based on the type of activity the user performs.

## Notifications panel

Notifications tell users of the result of certain tasks. You can mark a notification as read, or delete a notification.

## Glossary Settings workspace

Manage how you want to receive notifications.



### Glossary Relationships workspace

Create and manage relationship types between glossary assets.

## Business Glossary Access

Use the Business Glossary Desktop client or an internet browser to log in to Business Glossary to look up Glossary assets.

Glossary assets are available to users who have access to Business Glossary. Users must have permission to view a glossary to look up business terms, policies, and categories in the glossary.

You can use the Business Glossary Desktop client to look up the meaning of a term that you see in an application such as Microsoft Excel. Select the term and use hotkeys to start the Business Glossary Desktop.

### Logging in to Business Glossary

Use the Business Glossary URL to log in to the Business Glossary interface. When you log in to Business Glossary, you must specify the user name, password, and the native domain or the LDAP security domain.

1. Start a Microsoft Internet Explorer or Google Chrome browser.
2. In the Address field, enter the URL for the Analyst tool:  
`http[s]://<host name>:<port number>/analyst/`
3. If the domain uses LDAP or native authentication, enter your user name and password on the login page.
4. Select **Native** or the name of a specific security domain.  
The Security Domain field appears when the Informatica domain uses LDAP or Kerberos authentication. If you do not know the security domain that your user account belongs to, contact the Informatica domain administrator.
5. Click **Log In**.  
The Business Glossary page opens on the **Start** workspace.
6. Optionally, if you installed Business Glossary Desktop, click **Start > Informatica Business Glossary > Informatica Business Glossary**.

### Using Business Glossary Desktop

Use the Business Glossary Desktop to search for Glossary assets from your desktop. You can keep the Business Glossary Desktop running while you work in other applications. You can select a term in any application and use hotkeys to directly look up the definition of the term.

1. To start the client from your system menu, click **Start Informatica Business Glossary Desktop**.  
The **Informatica Business Glossary Desktop** window appears.
2. Search for a business term or select the term whose meaning you do not know in another application. Use hotkeys, such as `Ctrl+Shift+Q`, to start the Business Glossary Desktop.  
The Business Glossary Desktop appears as a pop up window and displays a list of business terms that match the term you highlighted.
3. Click a business term in the search results.  
The Business Glossary Desktop client displays the business term details.

4. Optionally, click the term to view more information about the term.  
Your default internet browser opens and details about the term appears in the **Glossary** workspace of Business Glossary.

## CHAPTER 2

# Finding Glossary Content

This chapter includes the following topics:

- [Finding Glossary Content Overview, 19](#)
- [Glossary Browsing, 19](#)
- [Look Up Content, 20](#)
- [Browse the Asset List, 21](#)
- [View Assets , 24](#)
- [View Asset Relationship, 27](#)
- [Alerts and Notifications , 32](#)
- [Frequently Asked Questions, 33](#)

## Finding Glossary Content 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.

**Note:** Your user privileges determine the assets that you can browse, the filters that you can apply, and the search results that you can view

## Glossary Browsing

Open the **Library** workspace to browse, search, or filter a collection of assets.

Click any section in the Library Navigator to look up glossary content. Based on the section you select, you can view the associated assets in the asset list. Browse through the asset list to look up content.

Expand the asset in the asset list to view the high-level asset details.

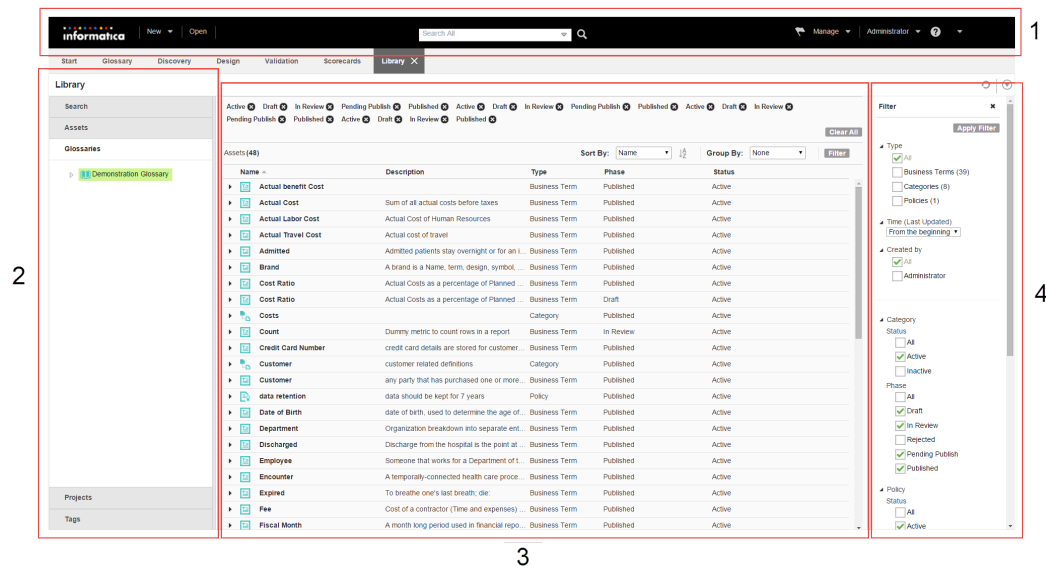
To refine the asset list, you can sort, group, or filter the assets. Search for assets by a search string or apply filters to refine the asset list. Enter the search filter properties or asset filter properties to filter the search results.

To view the properties of an asset, click the asset in the asset list to open it in the **Glossary** workspace. Based on the asset type, you can edit the asset, add comments to the asset, view the asset history, and view related assets.

## Library Workspace User Interface

You can browse the glossary content in the **Library** workspace.

The following image shows the **Library** workspace:



1. Analyst tool header area
2. Library Navigator
3. Asset list
4. Filter panel

## Look Up Content

You can look up glossary content in the **Library** workspace or using the search bar. Glossary assets are indexed based on the name and description by the Search Service.

The Library Navigator is a panel in the **Library** workspace where you can start the lookup.

Select one of the following sections in the Library Navigator to look up glossary content:

### Assets

View Business Glossary assets such as business initiatives, business terms, categories, glossaries, and policies. Select an asset type in the **Asset** section to find all the assets of that type. The Analyst tool also displays Discovery assets, Design assets and Scorecards assets.

### Glossaries

View glossaries and categories associated with the assets that you have the privilege to access.

## Tags

View Glossary assets and business initiatives that are tagged by system-defined tags.

For information on the Search Service, see the *Informatica 10.1 Application Service Guide*.

## Look Up by Asset

If you want to search for Business Glossary assets by asset type, you can browse the Library Navigator in the **Library** workspace. You can find business initiatives, business terms, glossaries, categories, and policies.

From the Library Navigator, click **Assets** and select a type of asset such as policy or business term. You can view assets of that type in the asset list. For example, select **Business Terms** to see a list of terms in all glossaries. The Analyst tool filters out inactive and rejected assets. To see all assets, including inactive and rejected assets, select **All** in the **Filter** panel.

## Look Up by Glossary

If you want to search for assets associated with a particular glossary, you can browse the **Library** workspace by the name of the glossary.

From the Library Navigator, click **Glossaries** to view a list of glossaries.

Click a glossary name in the **Glossaries** section to view the categories, policies, and business terms associated with the glossary.

Expand a glossary name in the **Glossaries** section to view all categories in the glossary. Click a category name to view the business terms and policies associated with the category.

## Look Up by Tag

Tags are labels that the Analyst tool associates with assets. If you want to search for assets by tags, you can browse the **Library** workspace by the system-defined tags.

The Analyst tool generates the following system-defined tags and associates them to Business Glossary assets:

- Assets I Own
- Assets in Review
- Most Followed Assets
- Assets I Follow

From the Library Navigator, click **Tags** and select **System-Defined**. You can view the Glossary assets and business initiatives that you own, the assets under review, the assets that you follow, and the assets that are followed by most users.

# Browse the Asset List

After you choose a way to look up Business Glossary assets from the Library Navigator, you can view a list of assets in the asset list. You can browse the asset list to find the asset that you want to view.

You can sort or group the list based on different options. You can apply filter conditions to find the assets that you want to view.

## Summary of Asset Details

You can expand the Business Glossary asset in the asset list to view a summary of the asset details.

Click the arrow in the name field to view details such as name, description, user who created the asset, and the timestamp for the last modification. For business initiatives, business terms, categories, and policies, you can also view the phase, state, and the glossary associated with the asset. Click the arrow again to hide the summary.

## Sort Assets

When you browse **Glossaries** and **Assets** in the Library Navigator, you can sort the collection of Business Glossary assets to view specific assets or asset details.

For example, as a data steward, you want to view the changes to an asset made in the last one hour. Sort the assets based on the last modified date and find the asset. You can open the asset and view the audit trail in the **Glossary** workspace.

Use any of the following options to sort assets:

- Name. The assets are sorted alphabetically based on the name of the asset.
- Type. The assets are sorted by business term, category, or policy type.
- Status. The assets are sorted by the active or inactive status of the asset.
- Phase. The assets are sorted by the phase of the asset.
- Created By. The assets are sorted alphabetically based on the name of the user who created the assets.
- Last Updated. Assets are sorted in ascending order based on the date on which the asset was last updated.

## Group Assets

When you browse **Glossaries** and **Assets** in the Library Navigator, use group by options to group the collection of Business Glossary assets.

The following table describes the options you can use to group assets:

Option	Description
None	Lists all objects without grouping.
Type	Type of the asset. For example, you can specify business initiative, business terms, glossaries, categories, and policies.
Created By	Name of the user who created the asset.
Last Updated	Date on which the asset was last updated. You can group assets by one of the following options: <ul style="list-style-type: none"><li>- Past 1 hour</li><li>- Past 24 hours</li><li>- Past week</li><li>- Past month</li><li>- Past year</li><li>- From the beginning</li></ul>

## Filter Assets

When you browse **Assets** in the Library Navigator, you can apply filters from the **Filter** panel to reduce the number of Business Glossary assets in the list based on the filter properties that you choose.

You can hide the **Filter** panel if you do not need to add filters.

You can filter the asset list by time period and user names to refine it.

In addition, for business terms, business initiatives, categories, and policy assets, you can select the asset state properties. You can also enter a search string in the **Find** box to refine the list

All assets that you have the privilege to access and that satisfy the filter conditions are listed in the asset list.

## Search Filter Properties

You can apply filters to search for an asset in the search results.

The following table describes the filter properties:

Property	Description
Find	<p>A search expression to filter assets in the asset list. You can use enter keywords or keyword phrases as the search expression.</p> <p>You can use the * and ? wildcard characters in a search to represent characters in the search string. Ensure that you do not use the * character at the beginning of the search string and that you use the wildcard character with at least one other character.</p> <p>Use the + operator to include both search terms. Use space to include either one of the search terms. Ensure that there is no extra space between the operator and the search term. For example, enter +customer and not + customer.</p> <p>Use quotes to search for the exact search string. For example, if the search term contains a special character, you can enclose the term within quotes for an exact match.</p>
Time (Last Updated)	<p>Time that the asset was last updated. You can select the following times:</p> <ul style="list-style-type: none"><li>- From the beginning</li><li>- Past 1 hour</li><li>- Past 24 hours</li><li>- Past week</li><li>- Past month</li><li>- Past year</li></ul>
Created By	<p>Name of the user who created at least one asset in the asset list. Select <b>All</b> to select all users.</p>

## Asset State Properties

Glossary content managers can specify filter properties for business initiatives, business terms, categories, and policies based on the state of the asset in the **Asset State** section.

Objects that you have the privilege to access are listed in the filtered asset list.

The following table describes the asset state filter properties:

Property	Description
Status	Filters assets based on the status of the asset. You can select any of the following values: <ul style="list-style-type: none"><li>- All. Include all Glossary assets and business initiatives of the asset type.</li><li>- Active. Include all Glossary assets and business initiatives of the asset type.</li><li>- Inactive. Include all inactive Glossary assets and business initiatives of the asset type.</li></ul>
Phase	Filters objects based on the phase of the asset. You can select any of the following values: <ul style="list-style-type: none"><li>- All. Include all Glossary assets and business initiatives of the asset type.</li><li>- Draft. Include all Glossary assets and business initiatives that are in draft phase.</li><li>- In Review. Include all Glossary assets and business initiatives that are in review.</li><li>- Rejected. Include all Glossary assets and business initiatives that are rejected.</li><li>- Pending Publish. Include all Glossary assets that are published but in the pending publish phase because they are part of a business initiative.</li><li>- Published. Include all Glossary assets and business initiatives that are published.</li></ul>

**Note:** Glossary consumers can view only published Glossary assets and business initiatives.

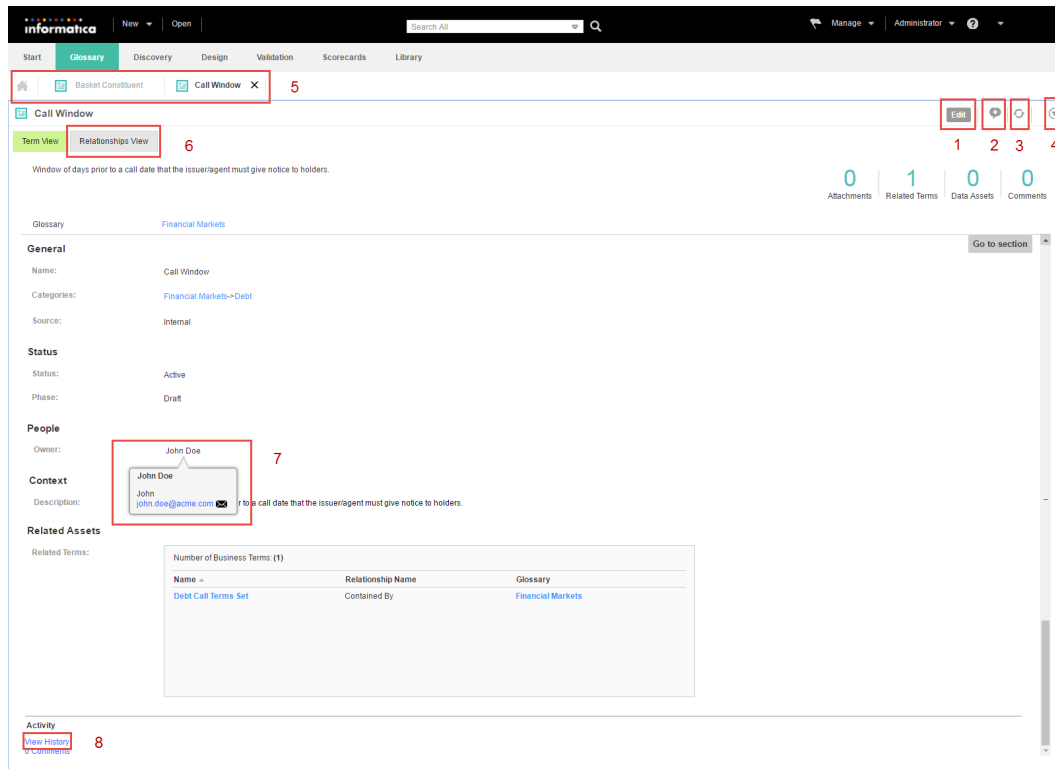
## View Assets

When you open a Business Glossary asset in the asset list, you can view the asset properties in the **Glossary** workspace. When you open multiple assets, the Analyst tool displays them in tabs. If the asset that you opened is in a tab, click the tab to view the asset properties.

The Glossary asset properties that you view depend on the asset type. For business terms and policies, you can click **Go to section** to view specific properties.

The following image shows the business term view:





1. Edit the asset
2. Add or view comments
3. Refresh the asset view
4. Follow the asset
5. View currently open assets as tabs
6. View the relationship diagram
7. View contact details
8. View audit trail

You can perform the following tasks after you open an asset from the **Library** workspace:

#### **Edit the asset.**

A content manager can edit the asset properties from the **Glossary** workspace when it is not in the published phase. The Glossary asset properties that you can edit are based on the type of asset.

#### **Add or view comments.**

You can add, view, and search comments associated with a Glossary asset.

#### **Refresh the asset view.**

You can refresh an asset to view real-time updates of changes that content managers make to an asset.

#### **Follow assets.**

You can follow the asset to track any changes and receive notifications.

#### **View related assets.**

You can view a diagram of relationships between the business term and assets.

### **View audit trail.**

You can view the history of changes made to an asset.

For example, as a data steward, you might want to view the audit trail of an asset.

### **View contact details.**

You can view the user name and email ID of the data steward, stakeholder, and owner by hovering over their names.

## Edit an Asset in the Glossary Workspace

You can open an asset from the **Library** workspace to edit the asset properties in the **Glossary** workspace.

Select an asset in the asset list in the **Library** workspace. Select **Edit** in the **Actions** menu.

**Note:** As a glossary consumer, you can view the asset properties. Select **Open** in the **Actions** menu.

The asset opens in the **Glossary** workspace. You can view or update the asset properties based on the type of asset.

### RELATED TOPICS:

- [“Business Term Properties” on page 89](#)
- [“Business Initiative Properties” on page 99](#)
- [“Policy Properties” on page 95](#)
- [“Category Properties” on page 97](#)
- [“Glossary Properties” on page 101](#)

## Manage Asset Comments

You can add, view, and search comments associated with a Glossary asset.

To add comments, open an asset and click the **Add Comment** icon. Enter your comment and click **Save**.

To view the comments added to an asset, open the asset. In the asset panel, click **Comments** in the **Activity** section. You can also view the number of comments associated with the asset.

In the **Search** panel, you can specify a search string in the **Search Comments** field to search the comments. You can clear the filter to enter another search string or view all the comments.

You can use the \* and ? wildcard characters in a search to represent characters in the search string. Use quotes to search for the exact search string. For example, if the search term contains a special character, you can enclose the term within quotes for an exact match.

You can click **Refresh** to view the latest comments.

## Refresh Assets

Click the refresh button next to the Actions menu to view the changes that other content managers make to an asset, in real time. If you are a Glossary consumer, you can see the changes made by the content managers when the data steward publishes a revision of the asset.

## Follow Assets

You can follow business terms, business initiatives, categories, and policies that are of interest to you to track any changes 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 change the assets that you follow.

Open the asset that you want to follow. From the **Actions** menu in the business term panel, select **Follow**.

## View Related Assets

Glossary consumers can use the relationship view to see a diagram of related assets.

To see a visual representation of all the assets that are related to the asset that you opened, click the **Relationship View** tab. The Analyst tool displays a dynamic diagram of the asset relationships. The relationship view diagram changes based on how you interact with it.

## View Asset History

You can view the history of changes to an asset.

You can view the following details about the changes to an asset:

- The name of the user who modified the asset.
- The action taken by the user.
- The fields that were modified and the modified values.
- The timestamp of the change.

To view the history of an asset, open the asset and click **View History** in the **Activities** section.

Optionally, you can apply a filter on the asset history to view specific changes. You can filter the asset history based on any of the following options:

- Name of user who made changes to the asset.
- Action taken by the user who made the changes to the asset.
- Field that was updated.
- The previous and modified values of the field.
- Timestamp

## View Asset Relationship

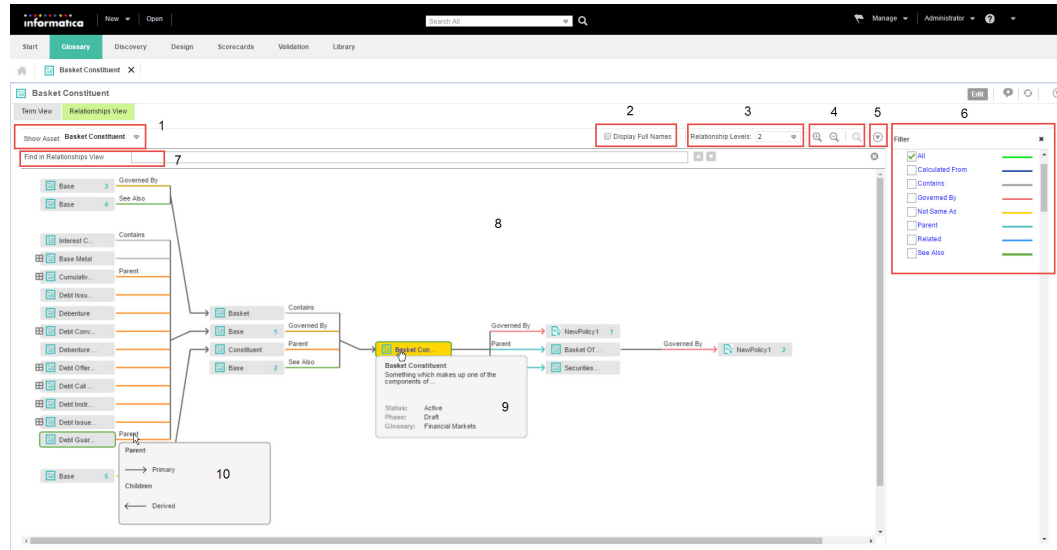
You can click the **Relationships View** tab after you open a business term or policy in the **Glossary** workspace. You can see a visual representation of all the assets that are related to the asset that you opened. Glossary consumers can use the relationship view to see related assets.

You specify relationships between assets when you define the asset. For example, a policy governs a business term. In the relationship view, the Analyst tool shows a diagram that represents the relationship between the business term and policy.

## Asset Relationship Diagram

When you open the **Relationships View** tab of a business term or policy, the Analyst tool displays a diagram of the asset relationships. The Analyst tool updates the diagram based on your interaction with the relationship view.

The following image shows the relationship view diagram:



1. View asset history.
2. Display full asset names and relationship names.
3. Change view level.
4. Zoom in, out or restore to original size.
5. Export the relationship view diagram.
6. Filter assets.
7. Search for assets.
8. View asset relationships.
9. Asset details on hover.
10. Relationship direction and name of primary and derived relationship on hover.

The direction of data in the relationship diagram is from left to right. The Analyst tool highlights the asset that you opened in Yellow. You can hover over the relationship name to see if the relationship type is uni-directional or bi-directional. You can view the name of the primary relationship on the line. On the left of the asset you opened is the derived relationship and the on the right is the primary relationship.

The color of the line depends on the type of relationship between the assets. The name of the relationship is displayed on top of the line. The asset that you opened and the related assets form the first level of the relationship diagram. The next level of the diagram is based on the asset in the previous level.

The Analyst tool displays two levels of relationships by default. If there are more relationship levels, you can change the number of levels in the relationship diagram and see additional relationships. If there are more relationships than the Analyst tool can display in the current level, you can see a plus icon next to the asset name. This indicates that the next level of relationships are closed. You can open the closed relationships by changing the display level. For example, the asset **Base Metal** has additional relationships to the left side that are collapsed in the diagram.

The Analyst tool displays the relationship of an asset when it occurs for the first time in the diagram. The Analyst tool does not display the related assets the next time onwards. However, you can see the number of occurrences of the asset next to the asset name. You can view a summary of the asset when you hover the mouse over above the asset name.

## Relationship View Tasks

You can change the way the Analyst tool displays the relationship view diagram. For example, you can search for assets, change the number of levels, and zoom in or zoom out of the diagram. You can export the diagram to a .pdf file or .png file.

### Change Relationship View Levels

By default, the Analyst tool shows two levels of the relationship view. You can change the view level to show more or less number of assets in the diagram. To see all the available levels, select **All** from the **Relationship Levels** list. You can view up to 75 levels when you select **All**. The Analyst tool expands the view horizontally to display more levels. You might have to scroll to see the new levels after you increase the number of levels.

### Display Full Names

The Analyst tool truncates the names of assets and relationships in the relationship view by default. Select the **Display Full Names** option to view the complete asset names and relationship names in the relationship view.

### Change the Magnification of the Relationship View Diagram

The relationship view diagram might contain many number of assets when you increase the number of view levels or if there are many relationships. The Analyst tool expands the relationship view diagram horizontally to accommodate all the relationships or levels. When the Analyst tool expands the relationship view diagram horizontally, you might have to scroll to see the assets.

Use the **Zoom In** and **Zoom Out** icons to change the magnification of the diagram. To avoid scrolling, you can zoom out of the diagram. You can zoom in to a specific area of the relationship view diagram to magnify the assets and relationships in that area. You can also click the **Restore Zoom** icon to rearrange the diagram to the original size.

### Filter Assets

You can use filters to show only the type of assets or relationships that you want to see. You can create custom filters based on the level, asset or relationship type. Create a custom filter to save and reuse the levels, assets or relationship types that you configure.

You can filter the assets that the Analyst tool displays in the relationship view diagram by the relationship type or asset type. You can select the check box next to the name of relationships to apply the filter. You can provide a name and save the filter configuration to see the same levels, type of assets or relationships again. All glossary users can use the custom filters across glossaries. If you do not intend to use filters, you can hide the filter panel. You can delete custom filters.

### Export Relationship View Diagram

You can export the relationship view diagram after you open it. Export the relationship view diagram to access the diagram when you are not logged in to the Analyst tool or to share the diagram with users who cannot access Business Glossary.

You can export the relationship view diagram to the following file types:

- Adobe PDF
- Portable Network Graphics (PNG) file

The Analyst tool exports the diagram from the Glossary workspace. You can change the view levels or filter the assets to customize the relationship view before you export the diagram. Select **Export to PDF** or **Export to PNG** from the **Actions** menu next to the **Hide Filter** button to export the relationship view diagram.

## Hide or Show Assets

When an asset has multiple relationships which are not displayed because the relationship level does not permit to do so, the Analyst tool displays an icon to hide or show the related assets.

## Highlight Assets

You can highlight assets in the relationship diagram based on their occurrence or based on their relationship type.

You can left-click an asset to highlight the occurrences of an asset. You can view the occurrence of the asset in the next level, previous level, and all levels.

You can highlight all the assets that belong to a particular relationship type. You can select a relationship type in the **Filter** panel to highlight all assets of that relationship type. The Analyst tool highlights the asset name and the lines that connect the related assets.

## Search for Assets

You can search for assets in the relationship diagram.

Click **Find** and type the asset name to search. The Analyst tool looks for the asset among the ones currently displayed. Assets which are hidden because they are part of a different level are not searched.

After you type the search keyword, the Analyst tool displays a list of possible matches. When you select a match, the Analyst tool highlights the asset in the relationship diagram.

## Additional Relationship View Tasks

You can interact with assets in the relationship diagram to easily identify information.

You can perform the following tasks in the relationship view diagram:

### **Open Asset.**

You can right-click an asset in the relationship diagram and click **Open Asset** to open the asset in the **Glossary** workspace. To change the context of the relationship view diagram, you can left-click the asset.

### **View Asset Details**

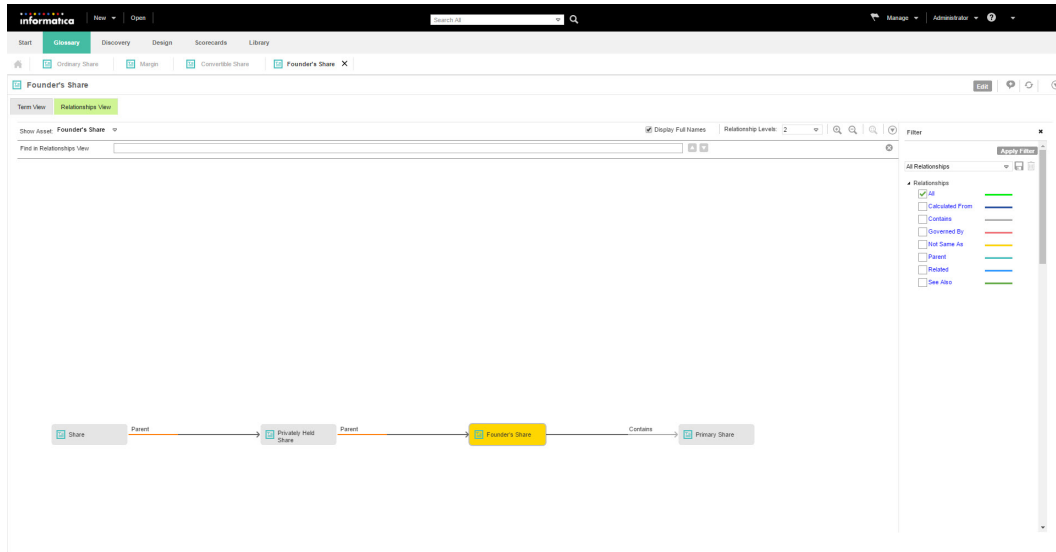
You can hover the mouse over the name of the asset that you have selected to view the asset details. The Analyst tool displays the asset description, state of the asset, and number of occurrences of the asset. Click the asset name to rearrange the relationship diagram based on that asset.

## Relationship View Example

The relationship view example describes how the Analyst tool displays the relationship data when you open an asset, and how the context of the relationship view changes based on your interaction with the asset. You open the business term in the **Glossary** workspace and click the **Relationships View** tab.

For the relationship view example, consider a business term, "Founder's Share" in the Financial glossary.

The following image shows the relationship view diagram of the terms related to "Founder's Share:"



### Level One

The first level displays the assets that are related to the term, "Founder's Share." The term "Founder's Share" contains the term "Primary Share" which is displayed on the right. The term "Privately Held Share" is the parent of "Founder's Share" which is displayed on the left. The name of the primary relationships are on the line connecting the terms.

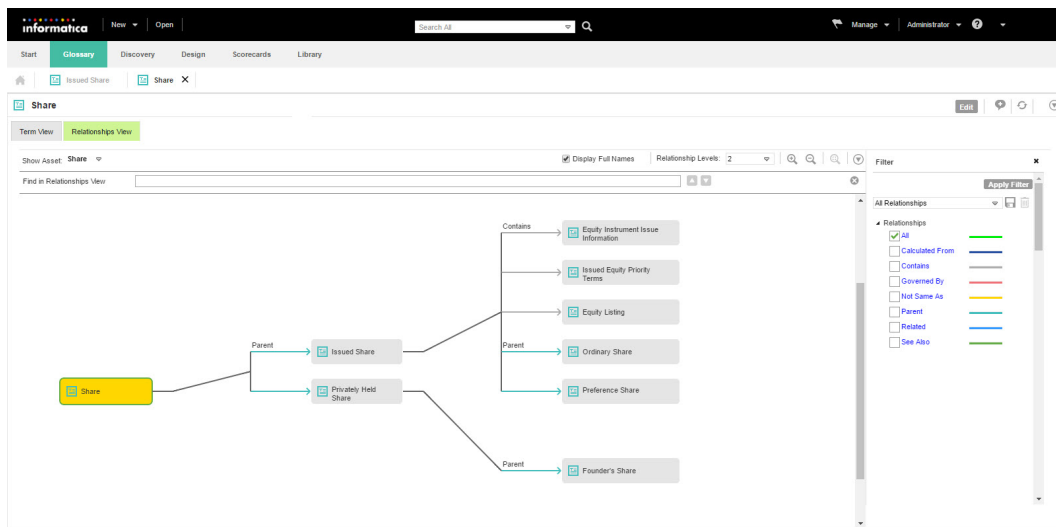
### Level Two

The term "Privately Held Share" has a parent, "Share." Hence, it is displayed to the left of the term "Privately Held Share."

Together, they form the parent-child relationship.

The term "Share" contains related assets, but they are not displayed because the context of the relationship view diagram is "Founder's Share." When you click the term "Share" in the relationship view, the Analyst tool rearranges the context of the relationship view diagram with the term "Share" highlighted. The term "Share" is highlighted in Yellow.

The following image shows the relationship view diagram of the term "Share:"



### Level One

The context of the first level is the term "Share." "Privately Held Share" and "Issued Share" are the children of "Share."

### Level Two

"Issued Share" contains three types of relationships that you can see in the second level. "Preference Share" and "Ordinary Share" are the children. "Issued Share" contains "Equity Instrument Issue Information," "Issued Equity Priority Terms," and "Equity Listing."

"Privately Held Share" has one type of relationship that you can see in the second level. "Founder's Share" is a parent to "Privately Held Share."

## Alerts and Notifications

The Analyst tool generates notifications when changes are made to Glossary assets and business initiatives with which you are associated. Information such as status updates is sent as notifications to you. You do not receive notifications for changes that you initiate but other content managers do.

The Analyst tool displays notifications in the header that appears at the top of the user interface. When you receive an alert on the Analyst tool header, you can view the notifications in the **Notification** panel. You can view the **Notification** panel in every workspace.

The Analyst tool generates notifications in the following scenarios:

- Data stewards, stakeholders, and owners receive notifications when you propose an asset for review.
- Data stewards, stakeholders, and owners receive notifications when you publish or reject the asset. Followers receive notifications only when you publish the asset.
- Data stewards, stakeholders, and owners receive notifications when you or other stakeholders add comments to an asset.
- Data stewards of governed business terms receive notifications when you propose, publish, or reject the governing policies.
- Data stewards of business terms that are related to a term receive a notification when you propose, publish, or reject the term. This is not true when the term is part of a business initiative and the term is proposed, published or rejected as part of the business initiative.
- Data stewards of business terms that are related to a term, stakeholders, and asset owners receive a notification at the reminder time of the voting process.
- Data stewards receive a notification at the start of the escalation interval and after the completion of the approval workflow.
- Data stewards of assets that are part of a business initiative receive notifications when you propose, publish, or reject the initiative.
- Data stewards, stakeholders, and owners of assets which are part of a business initiative receive a notification when the asset phase changes to pending publish.
- Data stewards and owners of business terms receive a notification when you or other stakeholders link business terms to data assets or rule assets.

The Analyst tool also sends the same notifications via email. To receive notifications over email, an administrator must enable and configure the Email Service in the Administrator tool.



## View Notifications

You can view the notifications that you received, delete notifications, mark notifications as read, or refresh the list to view the latest notifications.

An alert on the Analyst tool header indicates that you have a notification.

To view the notifications, from the **Manage** menu, select **Notifications**. Alternatively, you can click the notification in the Analyst tool header. You can view notification details such as the name of the sender, description of the notification, and the date and time when you received the notification. The notification description displays the asset name and glossary name to which the asset belongs.

## Manage Notification Preferences

By default, the Analyst tool sends you notifications in the Analyst tool header and via email. Based on your preference, you can change the delivery of notifications.

In the Analyst tool header, open **Glossary Settings** under **Manage** to configure your notification preference.

## Frequently Asked Questions

Review the frequently asked questions to understand how to find content in the **Library** workspace.

### **How can I find all the terms that are in review?**

As a stakeholder, you can click **Tags**, select **System-Defined**, and select **Terms Under Review** to view all the terms that you need to review.

### **How do I give feedback about a Glossary asset to the data steward and other stakeholders?**

As a stakeholder, you can open the business term and view it in the **Glossary** workspace. You can add or view comments.

### **How can I track changes to an asset?**

As a data steward, you can open the asset in the **Glossary** workspace and view the change history. You can also view the notification details when you receive an alert in the Analyst tool header.

### **How can I ensure that there is no negative impact on other assets if I make changes to an asset?**

As a data steward, you can view the asset in the **Glossary** workspace and view the linked and related assets. You can then analyze any impact on the related assets.

### **Why am I viewing the glossary properties instead of viewing the assets associated with the glossary?**

As a glossary administrator, when you open a glossary in the **Assets** section, you view the glossary properties. To view all the assets associated with the glossary, select the glossary in the **Glossaries** section.

### **Why can I not find all the terms in the list of business terms?**

Contact the glossary administrator to verify that you have the appropriate privileges to view all business terms in the asset list.

### **When can I use the Relationship View option?**

You can see assets that are related to the business term or policy that you opened in the **Relationship View** tab. The Relationship View shows a graphical representation of all the related business terms and policies. You can see the **Relationship View** diagram to easily understand the related assets and the type of relationship.

**Why can I not see all the assets related to the business term that I opened?**

The Analyst tool displays two levels by default. You can select **All** from the **Relationship Levels** list to view all the related assets. The Analyst tool only displays up to 75 levels.

## CHAPTER 3

# Glossary Content Management

This chapter includes the following topics:

- [Glossary Content Management Overview, 35](#)
- [Glossary Assets, 36](#)
- [Asset State, 38](#)
- [Business Initiatives, 42](#)
- [Asset Revision, 46](#)
- [Business Term Governance, 47](#)
- [Business Term Links, 48](#)
- [Business Terms Relationships, 49](#)
- [Glossary Content Relationship Example, 50](#)
- [Business Term Synonyms, 52](#)
- [Audit Trail, 53](#)
- [Frequently Asked Questions, 54](#)

## Glossary Content Management Overview

Data stewards and stakeholders are content managers who create and manage assets in the glossary for glossary consumers to view.

Content managers are responsible for the accuracy of content and structure of a glossary. The data steward collaborates with subject matter experts and stakeholders to create and manage business terms, categories, and policies. Stakeholders provide their inputs on the accuracy of the information in a Glossary asset, based on which data stewards approve or reject the asset.

As a data steward, understand the types of assets, and how you can relate the assets to one another. The relationship between assets forms the structure of a glossary and helps Glossary consumers gain an understanding of the meaning of a term. For example, you can link business terms through default relationships or custom relationships. You can create a policy to govern business terms. You can classify policies and business terms into categories.

Business terms, categories, and policies have the following common features:

- Each Glossary asset goes through an approval cycle before glossary consumers can view the assets. The Glossary administrator configures all the assets in a glossary to be published after either a simple approval or an approval workflow process.

- Each Glossary asset can have a data steward, owner, and stakeholder assigned to the asset.
- To update a published or rejected Glossary asset, the data steward must create a revision of the asset. The revised asset goes through an approval cycle before consumers can view the revision.
- The Analyst tool maintains an audit trail of actions that content managers perform on assets. Glossary consumers open an asset from the **Library** workspace to view the history of actions.
- Content managers can add comments to assets.

Data stewards can create a business initiative to manage bulk changes to multiple Glossary assets. Stakeholders can approve the business initiative to approve multiple Glossary assets. Data stewards can publish the business initiative to publish all the assets that are part of the initiative.

## 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 to 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.

### Categories

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.

Use categories to define a structure for the glossary. As a content manager, identify categories that will help glossary consumers look up content easily. The data steward links categories to business terms or policies when defining the business term or policy.

#### RELATED TOPICS:

- [“Category Properties” on page 97](#)

### Policies

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.

Create the policy before you define business terms. You link a policy to the term when you configure the term. When you define the policy, you can specify compliance criteria in the rule intent property. Glossary consumers understand the parameters that measure the compliance of business terms when they read the rule intent.

## RELATED TOPICS:

- [“Policy Properties” on page 95](#)

## Business Terms

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.

Content managers can provide basic or complex information in the business term. Simple properties are name, description, and context. Business terms can also contain default and custom relationships to other terms. Glossary consumers can click a link to open related business terms or policies that you link to the business term.

Business analysts who manage data assets and rule assets can link to business concepts or business language defined by a business term. Business users such as auditors can see linked assets to understand the location where data resides or technical implementation of rules defined in the business term.

## RELATED TOPICS:

- [“Business Term Properties” on page 89](#)

## Creating an Asset

Content managers create assets, such as business terms, policies, or categories, in the **Glossary** workspace. Configure the asset properties when you create an asset. The data stewards and owners that the Glossary administrators assign to a glossary are also assigned to the assets.

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

The business term, category, or policy panel opens in the **Glossary** workspace.

2. Configure the properties to create the asset.

**Note:** If you want to customize the property names, contact the glossary administrator. The glossary administrator can modify the Glossary asset template.

3. Choose to save the asset.

- To save the current configuration and continue the task later, click **Save and Continue**. The Analyst tool creates the asset with the current information that you have entered and displays the asset in edit mode.
- To complete the task, choose **Save and Finish**. The Analyst tool creates a draft asset and displays the asset in read-only mode.

## RELATED TOPICS:

- [“Business Term Properties” on page 89](#)
- [“Category Properties” on page 97](#)
- [“Policy Properties” on page 95](#)

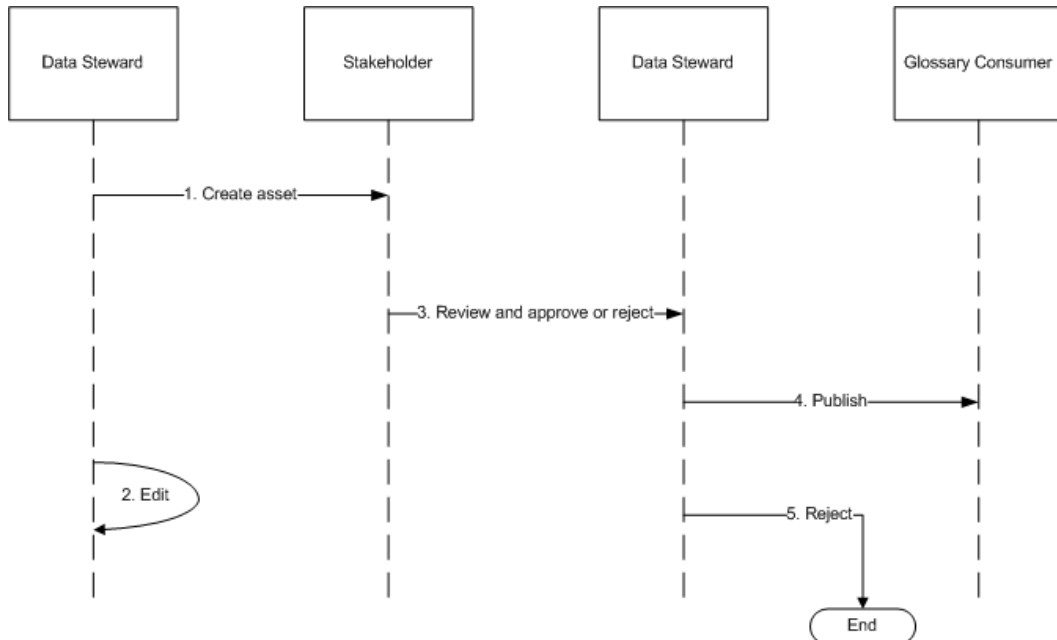
# Asset State

The asset phase and asset status represent the state of an asset such as a business term, business initiative, category, or policy. The Analyst tool changes the phase of an asset based on the task that the content manager performs to publish the asset. The data steward can manually change the asset status.

Data stewards collaborate with other business users in the organization to collect information required to configure the asset properties. After creating a draft asset, the data steward can choose to publish the asset after a simple approval or an approval workflow. The approval workflow involves a voting process.

During simple approval, stakeholders review the assets to approve the publication of the asset. Glossary consumers can view published assets. Data stewards can change the status of a published asset to indicate if the asset is valid for the organization.

The following image shows the tasks that the data steward and stakeholder perform to publish Glossary assets after a simple approval:



Data steward and stakeholders perform the following tasks to publish Glossary assets as part of the simple approval process:

1. The data steward creates the Glossary asset in a glossary.
2. Optionally, the data steward edits the Glossary asset.
3. The stakeholder reviews the Glossary asset and communicates approval.
4. Based on the review, the data steward either publishes the Glossary asset for glossary consumers to view, or rejects the asset. Glossary consumers cannot view rejected assets.

## RELATED TOPICS:

- [“Approval Workflow Overview” on page 56](#)

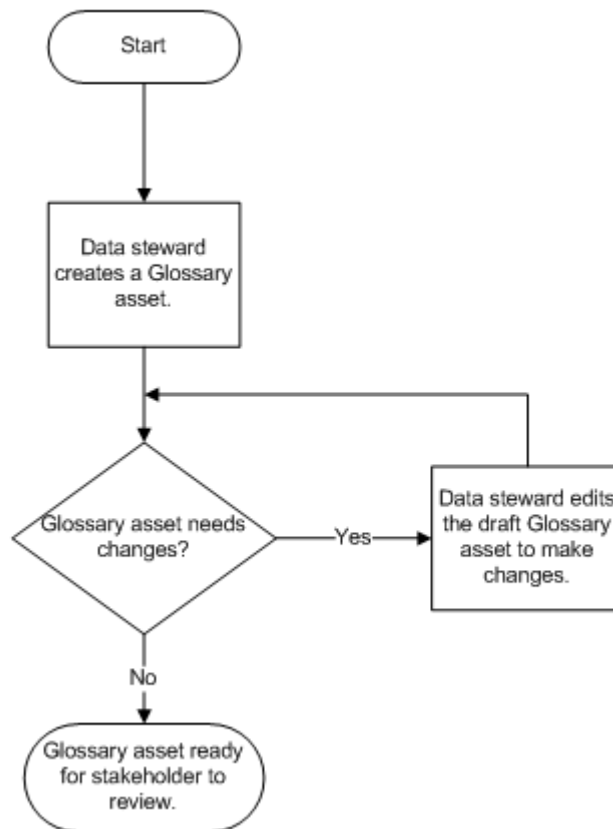
## Draft Phase

When the data steward creates an asset, it is in the draft state. Glossary consumers cannot view draft assets.

When the asset is in the draft phase, the data steward collaborates with business users of the organization to collect information required to configure the asset. The data steward can configure the asset iteratively. The data steward proposes a review by the stakeholder after defining the asset in the draft phase.

The following image shows the tasks that the data steward performs in the draft phase to create an asset:

### Draft Phase



The data steward performs the following tasks in the draft phase:

1. The data steward collaborates with business users to configure asset properties.
2. When the asset is ready for approval, the data steward proposes a review by the stakeholder and the phase changes to in-review. Stakeholders receive a notification after the data steward proposes the asset for review.

## Review Phase

The data steward proposes an asset for review after the data steward creates the asset. The data steward reviews the asset that the data steward proposes. When the data steward proposes an asset for review, the asset is in the **In Review** phase.

The stakeholder receives a notification when an asset is ready for review. The stakeholder collaborates with other stakeholders and the data steward to review the asset. In the review phase, the data steward and stakeholder use comments to communicate and record approvals. After review, the stakeholder communicates approval or rejection of the asset to the data steward.

## Proposing an Asset for Review

The data steward proposes an assets for review for the stakeholder to provide feedback. The phase of the asset changes to In Review.

The Glossary asset 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 asset that you want to propose for review.

The Analyst tool displays the business initiative, business term, category, or policy in the Glossary workspace.

4. From the **Actions** menu, select **Propose for review**.

The phase changes to In Review.

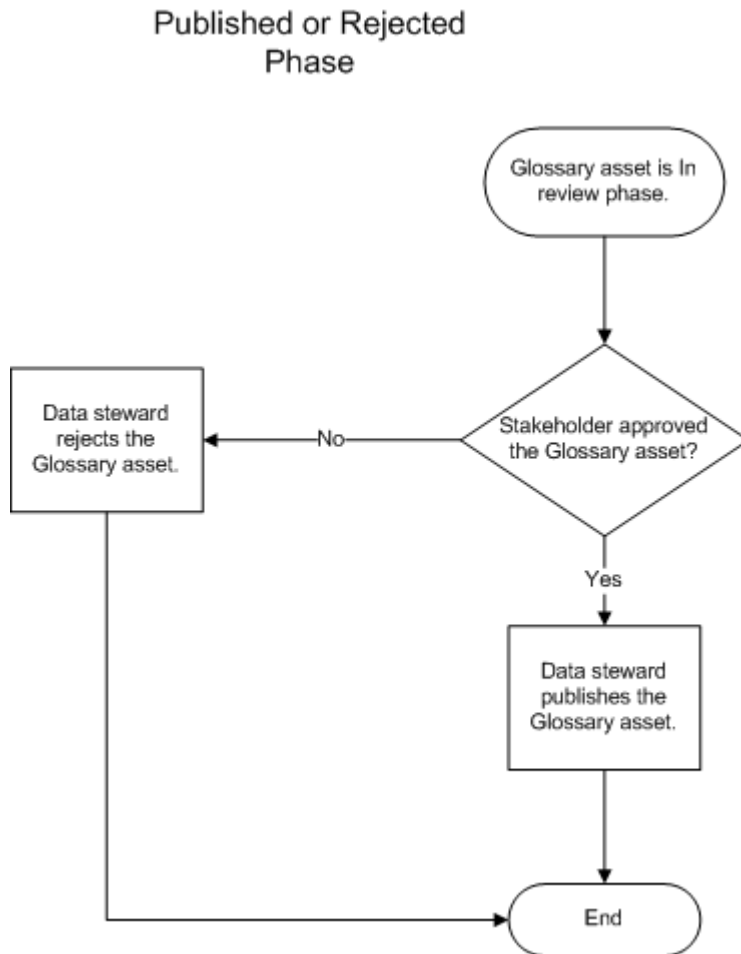
## Published or Rejected Phase

The data steward can publish or reject an asset based on the outcome of the review by the stakeholder. The phase of the asset changes to **Published** or **Rejected** based on the action the data steward performs.

After the data steward publishes the asset, glossary consumers can look up the asset in the **Library** workspace. Glossary consumers cannot see rejected assets. The data steward can create a new version of a published or rejected asset to make modifications to the asset properties.



The following image shows the tasks that the data steward performs to publish or reject an asset:



The data steward performs the following tasks:

1. If the stakeholder approves the asset, the data steward publishes the asset. The phase changes to **Published**.
2. If the stakeholder does not approve the asset, the data steward rejects the asset. The phase changes to **Rejected**.

## Publishing or Rejecting a Glossary Asset

Data stewards publish or reject assets after the stakeholder reviews the asset. The phase of the asset changes after the data steward publishes or rejects the asset.

The Glossary asset must be in the In Review phase before you can publish or reject the asset.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Click the asset that you want to publish or reject.

The Analyst tool displays the business term, category, or policy in the Glossary workspace.

4. Choose to publish or reject the asset.

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

- To reject the asset, from the **Actions** menu, **Reject**. The phase changes to rejected.

## Asset Status

Before the data steward publishes a business term, business initiative, category, or policy, the data steward can change the status of the asset. Use the asset status property to show the validity or relevance of an asset. Glossary consumers can look up active and inactive assets in the **Library** workspace.

An asset can have one of the following statuses:

### **Active**

A published asset is in the active state by default. Use the **Active** status to indicate that the asset is valid for the organization.

### **Inactive**

Use the **Inactive** status to retire an asset if the asset is no longer valid for the organization. You cannot delete obsolete assets.

### Example

Consider a term "Senior Sales Lead" in the sales glossary. The term is in use currently, but is not valid after six months because the organization decides to make the senior sales lead role redundant. The current status of the term is active. After six months, you can change the status of the term to inactive. The inactive status indicates that the role is no longer valid in the organization.

## Business Initiatives

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 in a glossary and you want to make changes to the affected assets.

The audit trail records the changes to the Glossary assets that are part of the business initiative. In the audit history, Glossary consumers can see the business initiative that the asset was part of. Glossary consumers can open a published business initiative from the **Library** workspace to view details about the initiative.

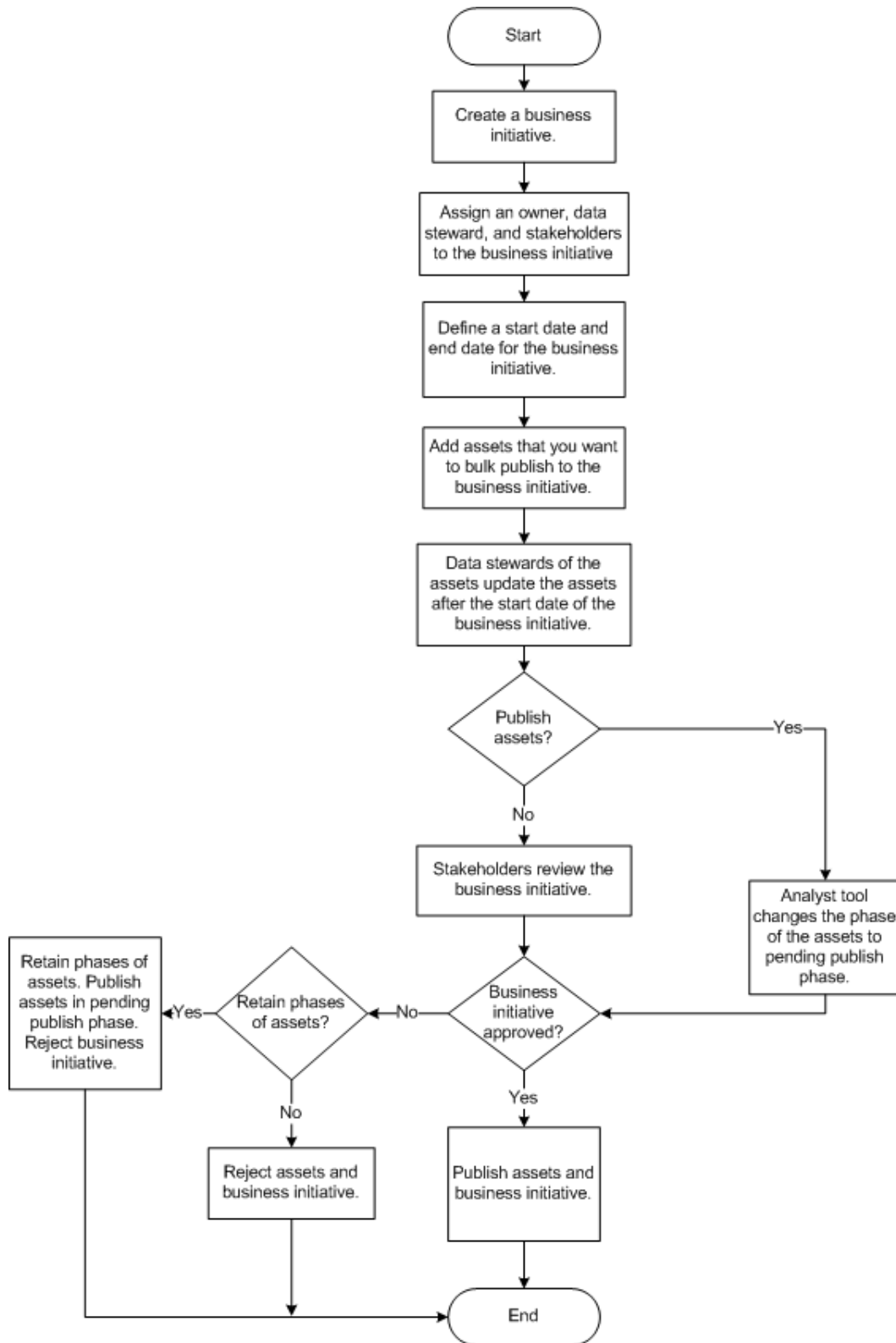
## RELATED TOPICS:

- [“Business Initiative Properties” on page 99](#)

## Business Initiative Workflow

To define a business initiative, you must specify the business initiative properties. When you publish or reject a business initiative, all the assets that are part of the initiative are affected. The business initiative workflow describes the steps you must perform after you create a business initiative.

The following image describes the business initiative workflow:



If you need to update the Glossary assets in a specific time frame, you can specify an open date and close date to record the time frame when the Glossary assets change. You can add Glossary assets that are in the

draft phase or review phase to a business initiative. A Glossary asset can belong to only one business initiative until the initiative is published or rejected.

The data steward of the assets that are part of the initiative must update each Glossary asset based on the requirements of the initiative. However, you can propose, approve, and publish or reject all Glossary assets in a business initiative at the same time. When you publish an asset that is part of an initiative, the Analyst tool defers the publish and changes the phase to **Pending Publish**. The Analyst tool publishes all assets, including the assets in the **Pending Publish** phase when you publish the business initiative.

When you reject a business initiative, you can choose to change the phase of all the assets that are part of the initiative to **Rejected**. Or you can retain the phases of the assets. When you choose to retain the phases of the assets, the Analyst tool changes the phase of the business initiative to rejected, but retains the phases of the assets that are part of the initiative. Any initiative that was in the pending publish phase is published. After you publish or reject an initiative, you cannot make further changes to the initiative.

## Business Initiative Example

Consider that one of guidelines in the Generally Accepted Accounting Principles (GAAP) of your region changed. The change impacts five assets in the finance glossary of the organization. You are the financial officer who is responsible for the finance glossary. Your goal is to ensure that the assets that have an impact by the GAAP guidelines are up-to-date.

As the financial officer who is responsible for the accuracy of the finance glossary, you define a business initiative called "Internal Accounting Changes." You specify an open date and close date for the initiative. You assign a data steward and three stakeholders to manage the business initiative. The data steward adds the five assets to the business initiative. The data steward must publish the business initiative before the close date. An administrator assigns the **Manage Initiatives** privilege to the business initiative data steward. Five different data steward manage the assets. The **Manage Initiatives** privilege permits the business initiative data steward to publish the five assets which are managed by different data stewards. The stakeholders verify the accuracy of the updates made to the Glossary assets.

The data stewards who manage the five assets update the asset properties after the open date. After the updates are complete, the business initiative data steward proposes the initiative for review. The data stewards who manage the five assets receive a notification when the initiative goes through approval. The stakeholders who manage the business initiative verify that the information in the five assets is accurate. Based on the outcome of the review, the stakeholders accept the initiative. The business initiative data steward then publishes the initiative before the close date. The Analyst tool publishes the five assets based on the outcome of the business initiative approval process. The data stewards who manage the assets receive a notification when the Analyst tool publishes the assets.

## Creating a Business Initiative

Content managers create business initiatives in the **Glossary** workspace. Configure the business initiative properties when you create an asset.

1. From the **New** menu, select **Business Initiative**.  
A business initiative opens in the **Glossary** workspace in edit mode.
2. Configure the business initiative properties.  
**Note:** If you want to customize the property names, contact the glossary administrator. The glossary administrator can modify the business initiative template.
3. In the **Assets Collection** section, from the **Actions** menu, click **Add**.
4. In the **Assets** dialog box, select the assets that you want to add to the business initiative.
5. Optionally, you can add an asset to a business initiative when you create or edit the asset.

6. Choose to save the business initiative.
  - To save the current configuration and continue the task immediately, click **Save and Continue**. The Analyst tool creates a draft business initiative and displays the initiative in the edit mode.
  - 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.

## Editing a Business Initiative

Content managers edit business initiatives in the **Glossary** workspace. You can move assets to a new initiative when you edit the current initiative.

1. From the **Library** workspace, open the business initiative that you want to edit.  
The business initiative opens in the **Glossary** workspace.
2. Click **Edit**.  
The business initiative opens in edit mode.
3. Edit the business initiative properties.
4. Optionally, select the assets you want to move to a new business initiative. To move the select assets, click the **Actions** menu and select **Move to New Initiative**.  
The **Move Assets to a New Business Initiative** dialog box opens.
5. Specify the name and description of the new business initiative, and click **Save**.  
The Analyst tool creates a new business initiative and adds the assets that you selected.
6. Choose to save the business initiative.
  - To save the current configuration and continue the task later, click **Save and Continue**. The Analyst tool creates a draft business initiative and displays the initiative in edit mode.
  - To complete the task, choose **Save and Finish**. The Analyst tool creates a draft business initiative and displays the initiative in read-only mode.

## Asset Revision

Content managers might need to update a Glossary asset properties after it is approved. To update an asset, content managers must create a revision of the asset after it is published or rejected.

When content managers revise a published or rejected glossary asset, the Analyst tool creates another version of the asset. Content managers must complete the approval of the asset before the data steward can publish the changes. Glossary consumers can see the revised asset only after the data steward publishes the updated version. The updated published version of the glossary asset replaces the previously published version of the glossary asset.

A glossary asset can exist in three different versions in a glossary such as draft or in review, published, and rejected. When the content manager creates a revision of a published asset, the second version of the glossary asset exists in the draft phase. When the content manager publishes the revised glossary asset, the Analyst tool replaces the original published glossary asset with revised published version of the glossary asset. If the content manager rejects the revised published version of the glossary asset, the Analyst tool displays the original published version and revised rejected version of the glossary asset.

### Example

Consider a rejected term called `Tax` in the Analyst tool. As a content manager, you might want to make changes to the description of the rejected term, and then publish or reject the term after the approval process. To make changes to the rejected term `Tax`, the content manager creates a revision of the term and sends the revised term with the changes for an approval process. After the approval process, the data steward either publishes or rejects the term.

- If the data steward publishes the revised term `Tax`, the Analyst tool creates a published version of the term `Tax`. At this point, both rejected and published version of the term `Tax` exist in the Analyst tool.
- If the data steward rejects the revised term `Tax`, the Analyst tool replaces the first rejected version of the term with the second rejected version of the term.

## Revising an Asset

Content managers create a revision of published or rejected assets to update information in the properties.

1. Open the asset that you want to revise.

The Analyst tool displays the business term, category, or policy in the **Glossary** workspace.

2. In the **Actions** menu, click **Create a Revision**.

A confirmation dialog box appears.

3. Confirm that you want to create a revision.

# Business Term Governance

Content managers can add rules to ensure that a business term is compliant with the business objectives of the organization. The rule can be specific to the business term, or linked to a policy.

Content managers can create the following rules:

### **Rule from policy.**

A content manager can create a rule from a policy if the policy exists in the glossary. The data steward publishes a policy after an approval cycle. A policy document high-level business purpose, process, or protocol that is important to the organization. A policy can govern multiple business terms. Glossary consumers can click a link to view the policy from which the content manager created the rule. When the content manager creates a rule from a policy, the rule intent appears in the business term. The content manager can edit the rule intent in the business term. The rule intent in the policy does not change when the content manager changes the rule intent in the rule.

### **Standalone rule.**

If the glossary does not contain a policy to describe a business purpose, process, or protocol of the organization, the data steward can define a rule when configuring business term properties. The rule can document business purpose, process, or protocol that is specific to the term. A rule is applicable to the current business term.

Content managers must define a rule intent when they define the rule or policy. Consumers can verify if a business is compliant by viewing the criteria in the rule intent.

To provide technical information about the rule implementation, business analysts or data stewards can link a rule asset to the rule, or create a rule specification and link the rule specification to the rule. The rule specification converts business rule logic to a maplet in the Model repository. Rule assets contain transformations or business logic.

## Rule Intent

A rule intent describes how the organization implements a policy or rule. Describe the criteria that defines how a business term must comply with a policy or rule. Define the rule intent in the policy, or in the rule, while configuring business term properties.

### Example

Consider a business term "tax ID" in the finance glossary. As a content manager, you want the tax ID information to be private. Link the privacy policy to the business term and create a rule. If the privacy policy does not exist, create a rule that specifies that the tax ID information must be private. In the rule intent of the policy or rule, define how the tax ID can comply with the privacy policy. You can specify the encryption used to make the term compliant with the privacy policy.

## Creating 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 the business term.
4. To edit the business term, click **Edit**.

**Note:** You must open a business term that contains a rule in the **Rules** property in the **General** section.

5. In the **Assets** column click the **Add** icon.  
The **Design** workspace opens.
6. Configure the rule specification properties.
7. Click **Save**.

For more information about rule specifications, see the *Informatica Rule Specification Guide*.

## Business Term Links

You can link technical metadata (catalog objects), data assets, rule assets, or columns in a profile to business terms. Data assets, rule assets and profiles are not part of the glossary but are assets in the Analyst tool. Catalog objects are in Metadata Manager and Enterprise Information Catalog. You can also link to external reference tables URL that contains the values which are valid for a business term.

A column profile determines the characteristics of columns in a data source, such as value frequency, percentages, and patterns. Rule assets and data assets contain information to support business operations within the enterprise. Catalog object in Metadata Manager and Enterprise Information Catalog contain technical metadata.

For example, if the current business term defines Social Security number, glossary consumers can look up the data asset to view the domain where the Social Security number is available. Glossary consumers can view the business logic that is used to mask Social Security numbers in the rule asset.



## Data Asset

A data asset represents the source that contains metadata.

Business terms can contain links to the following types of data assets:

- Data domains. A predefined or user-defined Model repository object that represents the functional meaning of a column based on the column data or column name. Examples are Social Security number, credit card number, and email ID.
- Data objects. Sources used to extract metadata for analysis.

For example, sensitive data such as Social Security numbers are stored in a data domain. The data asset for the business term "sensitive data" contains a link to the data domain location. An auditor who reads the business term can see the location where sensitive data is stored.

## Rule Asset

A rule is business logic that defines conditions applied to data when you run a profile.

Business terms can contain links to the following types of rule assets:

- Mapplet. A reusable asset in repositories that contains a set of transformations.
- Rule definition. Business logic that defines conditions applied to data when you run a profile.

For example, the organization requires sensitive information such as Social Security number to be masked. A mapplet defines how a Social Security number is masked. The mapplet is linked as a rule asset to the business term "Social Security number." An auditor who reads the business term can also see the mapplet rule used to mask the data.

## Reference Table URL

You can add a link to an external reference table that contains the values that are valid for a business term.

Consider the business term "discount voucher" in the glossary of a retail organization. You can add a link to a table that provides the percentage of discounts allowed for vouchers.

# Business Terms Relationships

Content managers can link business terms based on default relationships, or custom relationships. An administrator can modify the business term template to define custom relationships. Link business terms when you define the business term.

Relationships help glossary consumers understand how the current business term interacts with other terms in the same glossary. Use relationships to provide a broader definition of business concepts, and to extend the context of information in complex business terms.

You can use the following relationships to define related terms:

### See Also

A see also relationship is a relationship that helps you to identify business terms that have semantic similarity to the current business term. You can use a see also relationship to link to other terms that provide more information about a concept or a business process than what is described in the current business term.

For example, if the current business term is "payslip," you can create links to "salary," "deductions," and "bonus." The three business terms are related because they are components of a payslip.

#### **Not Same As**

The not same as is a relationship that helps you identify the following types of terms:

- Terms that have a similar name but have different meanings. Link to business terms that have the same name as the current business term but are semantically different. For example, in the manufacturing glossary, "shuttle" can be used to denote weaving or to denote a transportation vehicle.
- Terms that business users might use to denote the current term, but are not an accurate representation of the current term. For example, the term "portfolio" is not the same as "stocks."

#### **Parent - Child**

A parent-child relationship is a relationship that helps you to link business terms to other terms that define high level concepts. The business term that you are defining might use the high level concept that is available in a parent term. The child business term can derive information based on the concepts in the parent business term. Link the parent business term when you define the child business term. You can view the child term in the **children** property when you open the parent term.

For example, "simple mortgage" and "reverse mortgage" are child terms to the parent term "mortgage."

#### **Contains**

The contains property helps you to identify other business terms used to implement the concept or practice in the current business term.

For example, a bank check contains a Magnetic Ink Character Recognition (MICR) number. If the current business term is "check," use the contains relationship to link to the business term "Magnetic ink character recognition (MICR) number."

#### **Calculated From**

The calculated from property helps you to identify business terms from which you can calculate the value of the current business term.

For example, the value of the term "gross profit" is calculated from the value of the business term "revenue."

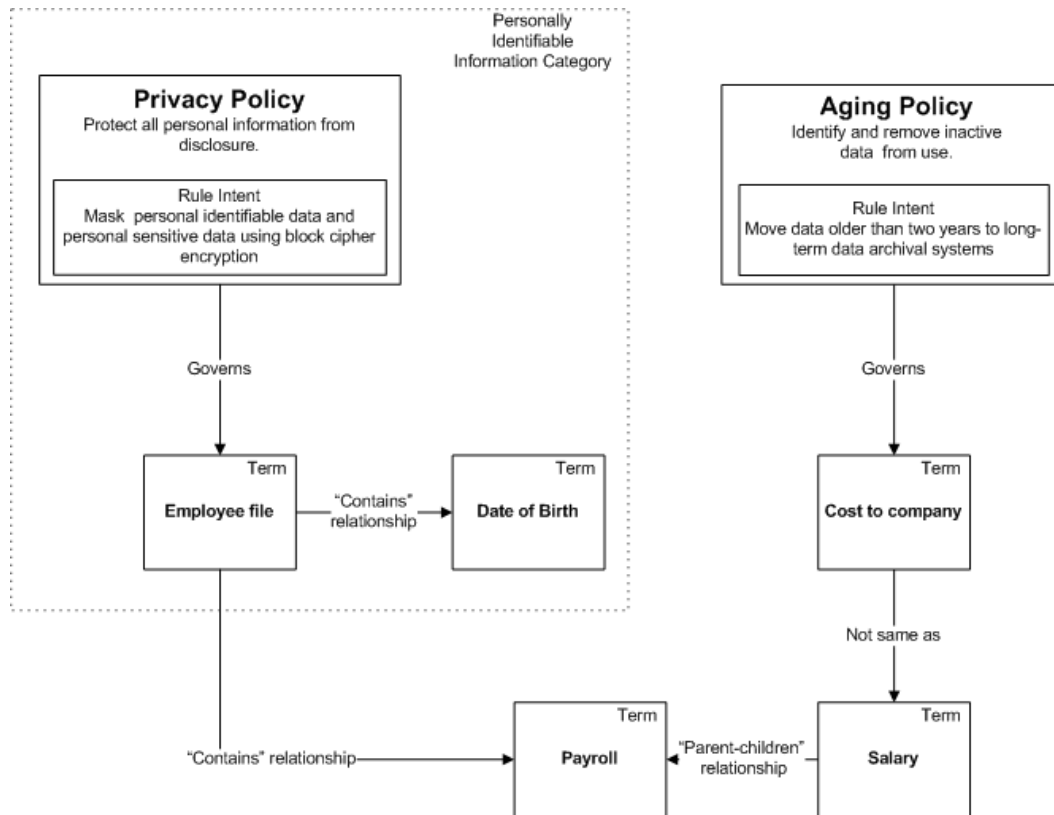
## Glossary Content Relationship Example

You are the data steward who is responsible for the human resources glossary. Create and relate business terms, policies, and categories as shown in the example.

You can create the following relationships between Glossary assets:

- Use default relationships to relate business terms.
- Use policies to govern business terms.
- Classify policies and business terms in categories.

The following image shows Glossary assets and their relationships:



Create the following policies to govern business terms:

#### Privacy policy

The privacy policy states that private information must not be disclosed. The privacy policy has a rule intent that private information must be masked to protect disclosure of employee data. An employee file contains personal information such as employee date of birth. Use the privacy policy to indicate that the date of birth of an employee must not be disclosed, and data must be masked in the database to prevent accidental disclosure.

#### Aging policy

The aging policy states that inactive data must not be used. Govern "cost to company" by the aging policy because the employee data defined by the term "cost to company" changes every financial year.

Create the following category to classify business terms and policies:

#### Personally identifiable information.

Classify the privacy policy, "employee file" and "date of birth" terms in the "personally identifiable information" category for glossary consumers who want to view assets related to personally identifiable information.

Create the following relationships between business terms:

#### Contains relationship

An employee file contains details such as employee date of birth and payroll information. Use the "contains" relationship to link the term "employee file" with the term "date of birth" and the term "payroll."

### Parent-child relationship

Employee payroll is calculated from the employee salary. The parent term is "salary" and the child term is "payroll."

### Not same as

Cost to company is often incorrectly used to denote salary. Use the "not same as relationship" to indicate that "salary" and "cost to company" do not have the same meaning.

## Business Term Synonyms

As a content manager, add words that are synonymous with the current business term when you create or edit the business term. If you edit an existing business term and change the name, you can choose to save the previous name as a synonym.

A Glossary consumer can search for the synonym of a business term. The Analyst tool shows the business term in the search result because the synonym is linked to the business term. Synonyms can be active or inactive to indicate validity. Glossary consumers see the status of the synonym to verify if the synonym is in use.

You must provide a name, context, create date, and retirement date for the synonym. After the retirement date, the Analyst tool changes the status of the synonym to inactive.

### Example

Consider that you are the data steward of the Human Resources department of an organization that has been through an acquisition. The organization that acquired your organization doesn't use the term "Costs to Company." The business term "Cost to Company" must be changed to "Total Compensation." In the Human Resources glossary, you rename the business term "Cost to Company" to "Total Compensation." You add the word "Cost to Company" as a synonym to indicate to employees that both "Cost to Company" and "Total Compensation" have the same definition. You provide a duration of six months after which the term "Cost to Company" is no longer used.

After the six-month duration, the Analyst tool changes the status of the synonym "Cost to Company" to inactive. Glossary consumers see that the synonym is not valid anymore. Users can still search for "Cost to Company" and the Analyst tool returns the business term "Total Compensation" in the search results.

## Adding a Synonym to a Business Term

Add a synonym to a business term when you define or edit the business term in the Glossary workspace.

1. To add a synonym to a new business term, from the **New** menu, select **Business Term**.  
The business term opens in **Glossary** workspace.
2. Optionally, to add a synonym to an existing business term, open the business term from the **Library** workspace and click **Edit**.  
The business term opens in edit mode in the **Glossary** workspace.
3. In the **Synonyms** property, from the **Actions** menu, click **Add**.  
The **Add Synonym** dialog box opens.
4. Configure the **Name**, **Context**, **Create Date** and **Retirement Date** properties.

5. Click **OK** to add the synonym.

The Analyst tool adds the synonym to the business term. The status of the synonym is **Active** until the retirement date.

## Changing the Status of a Synonym

You can change the status of a synonym to indicate the validity of the synonym. Edit a business term to change an active synonym to inactive or to change an inactive synonym to active.

1. Open the business term from the **Library** workspace and click **Edit**.  
The business term opens in edit mode in the **Glossary** workspace.
2. In the **General** section, select the check box next to the synonym that you want to make active or inactive.
3. Choose to change the status of the asset.
  - To change the status of an inactive synonym, from the **Actions** menu next to the synonym, select **Change Status to Active**.
  - To change the status of an active synonym, from the **Actions** menu next to the synonym, select **Change Status to Inactive**.
4. To change the status of the synonym, set the **Retirement Date**.
  - To change the status of an active synonym, set the **Retirement Date** to today's date.
  - To change the status of an inactive synonym, set the **Retirement Date** to a date in the future.
5. Click **OK**.

## Audit Trail

An audit trail records all changes that content managers make to an asset. Content managers, administrators, and glossary consumers can view the audit trail in the **Activity** section of the asset.

The audit trail indicates all the previous values of the asset property and the changed value. The audit trail contains information about the user who made the edit and the date on which the user made the edit. Users can sort the audit trail information in ascending or descending order.

As a content manager, use the audit trail to view past edits to the asset. You can compare the property value from a past edit to the current value. Use this information to ensure that the changes are approved or compliant with the approval process.

If the Glossary administrator has enabled the approval workflow, the audit trail displays the voting history for the asset. View the **Voting History** tab to see the number of votes cast, the name of the approvers, and the actions performed by the content managers.

For example, the data steward might change the description of a business term after approval by the stakeholder. As a stakeholder, you can view the audit trail to ensure that this change meets the needs of the organization.

## Viewing an Audit Trail

Open the audit trail to view records of all changes that the content managers made to an asset.

1. Click the asset for which you want to view the audit trail.  
The Analyst tool displays the business term, category, or policy in the Glossary workspace.
2. Click **View History** in the **Activity** section.  
The **View History** dialog box opens and you can view the audit trail for the asset.

## Frequently Asked Questions

Review the frequently asked questions to understand how to manage glossary content.

### **As a data steward, how can I add content to a glossary?**

Create business terms, categories, and policies to add content to a glossary.

### **As a stakeholder, how will I know when a Glossary asset is ready for review?**

You receive alerts when a Glossary asset that you are associated with changes. You receive an alert on the Analyst tool header, and you can view the notifications in the **Notifications** panel or via email.

### **As a data steward, how can I update a Glossary asset after I have published the asset?**

Create another version of the Glossary asset to update the asset after it is published. You must complete the approval process for the updated asset before glossary consumers can view the updates.

### **What is the difference between the inactive status and rejected phase?**

The inactive status indicates that the asset is retired. The rejected phase indicates that the stakeholder did not approve the asset.

Glossary consumers cannot see assets that are in the rejected phase. Glossary consumers can see an asset that has the inactive or active status. Use the status to indicate that an asset is no longer valid for the organization. Reject an asset that was not approved by the stakeholder or an asset you do not want to publish anymore.

### **Can I make changes and publish a rejected asset?**

You can create a version of a rejected asset and publish the new version after the approval cycle.

### **What assets can glossary consumers view?**

Based on the permissions, glossary consumers can view assets in the published phase. The status of the published asset can be active or inactive.

### **How are categories useful to glossary consumers?**

Glossary consumers can click **Glossaries** in the **Library** workspace view a list of categories. Glossary consumers can browse the categories to view business terms and policies that are in the category.

### **How can I govern business terms if there are no policies in the glossary?**

Create a rule when you configure a business term. You can specify the criteria that governs business terms in the rule intent.

**How can I link business terms?**

You can create a relationship between business terms to link business terms. Use the following relationships to link business terms:

- See Also
- Not Same As
- Parent-Child
- Contains

**How can I relate two business terms with a relationship that is not part of the Analyst tool?**

You can relate two business terms with a custom relationship. The glossary administrator can create a custom relationship in the glossary template.

# CHAPTER 4

## Approval Workflow

This chapter includes the following topics:

- [Approval Workflow Overview, 56](#)
- [Approval Workflow Intervals, 57](#)
- [Glossary Administrator Tasks , 57](#)
- [Data Steward Tasks , 59](#)
- [Approver Tasks , 63](#)

### Approval Workflow Overview

Approval workflow is an advanced approval process for data stewards to publish or reject Glossary assets after obtaining votes from approvers. Glossary assets can go through two levels of voting one after the other.

After a glossary administrator configures the approval workflow for a glossary, the data steward must publish or reject all draft assets in that glossary through a voting process. The glossary administrator and data steward can configure stakeholders, owners, and other glossary subject matter experts as approvers. Approvers cast their vote to approve or reject the changes made to a Glossary asset. The asset still remains in the **In Review** phase when the voting time elapses and all the approvers do not cast their votes to approve the asset.

The first level of approvers are asset owners, asset stakeholders, and data stewards of related assets. The second level of approvers are other users of Business Glossary whose participation in the approval workflow is important.

An approver can perform the following actions:

- Approve, reject, or abstain from voting.
- Delegate their vote to another approver.
- Add comments.
- Cast their vote more than once before the end of the voting time. The Analyst tool considers only the latest vote.
- Cast their vote more than once as replaced approvers or delegated approvers. The Analyst tool counts every vote as unique although it was cast by the same user.

In the **Voting Dashboard** and **Voting Page**, the Analyst tool displays the votes which the approvers cast and the comments that they added. The audit history in the **Glossary** workspace records the details of the approval workflow. The data steward who is assigned to the asset can publish or reject an asset based on the voting results.



In the **Activity** section of a Glossary asset, content managers and reference users can click **History** to view the audit trail of the approval workflow. The Analyst tool displays information about the approval workflow in the **Voting History** tab.

#### RELATED TOPICS:

- [“Asset State” on page 38](#)

## Approval Workflow Intervals

The Glossary administrator sets the reminder time and escalation interval for the approval workflow. The Analyst tool changes the voting status based on the reminder time and escalation interval.

The reminder and escalation intervals are based on the end time that the data steward configures when proposing the asset for voting. Level 1 and level 2 have unique end times for the reminder and escalation intervals. The end time for level 2 must be later than the end time for level 1.

#### Reminder Time

The Analyst tool sends out notifications to approvers who have not voted at the start of the reminder time.

#### Escalation Interval

The escalation interval is for data stewards to replace approvers who have not voted or assign an additional approver to an existing approver. Either the replaced approver or the original approver can cast their vote. The escalation time must start after the reminder time.

## Glossary Administrator Tasks

You must configure the approval workflow before the data steward can use the approval workflow to publish Glossary assets.

Perform the following tasks before you configure the approval workflow:

1. Create and enable the associated Data Integration Service in the Administrator tool. Enable and configure the Workflow Orchestration Service properties in the Data Integration Service.
2. Identify the reminder time interval and escalation time interval.
3. Configure level 1 voters.
4. Identify approvers who will be part of the level 2 voting.

## Approval Workflow Configuration

As a Glossary administrator, configure the approval workflow for a glossary. After you enable the approval workflow, the data steward must publish or reject all new assets in the glossary after the voting process.

The following table describes the properties for the Approval Workflow Configuration:

Property	Description
Default Approvers	Assigns content managers of the Glossary asset. The content managers that you specify here are the default approvers in level 1 during the advanced approval workflow. You can select the stakeholders and owners of the asset and data stewards of related business terms as content managers.
Enable Voting for Asset Changes	Enables or disables the approval workflow. After you enable this option, the default approvers that you configured are part of the level 1 approval process.
Settings for Level 1 Approvers	Sets the reminder time and escalation interval for the approval workflow for level 1 approvers. The <b>Voting Reminder Before End Time</b> must be greater than <b>Escalation Interval Before End Time</b> .
Enable Level 2 Voting	Enables or disables level 2 approval.
Approvers	Configures approvers that are part of the level 2 approval for all the assets in the glossary.
Settings for Level 2 Approvers	Sets the reminder time and escalation interval for the approval workflow for level 2 approvers. The <b>Voting Reminder Before End Time</b> must be greater than <b>Escalation Interval Before End Time</b> .

## Configuring the Approval Workflow

As a Glossary administrator, configure the approval workflow for a glossary after you save the glossary. You can enable the approval workflow for a glossary when there are no assets from the glossary in the **In Review** phase. After you enable the asset approval workflow, all assets in the glossary must go through the voting process.

1. Open the glossary where you want to configure the approval workflow.
2. Click **Edit** to edit the glossary.
3. Click the **Asset Approval Configuration** panel.
4. Select the default approvers for the asset.
5. Select **Enable Voting for Asset Changes** to enable voting.  
Options to configure settings for the level 1 approvers appear.
6. In the **Settings for Level 1 Approvers**, configure the settings for the voting reminder and escalation reminder. You cannot change these settings later.
7. Optionally, select **Enable Level 2 Voting** to enable a second level of approval.
8. Add level two approvers.
9. Configure the voting reminder and escalation reminder for level 2 approvers. You cannot change these settings later.
10. Choose to save the glossary.
  - To save the current configuration and continue with the task immediately, click **Save and Continue**.
  - To complete the task, choose **Save and Finish**. The Analyst tool updates the approval workflow configuration settings.

## Disabling the Approval Workflow

As a Glossary administrator, you can disable the approval workflow when there are no assets from the glossary in the **In Review** phase. After you disable the asset approval workflow, the assets in the glossary do not go through the voting process.

1. Open the glossary where you want to disable the approval workflow.
2. Click **Edit** to edit the glossary.
3. Click the **Asset Approval Configuration** panel.
4. Deselect **Enable Voting for Asset Changes** to disable voting.  
Options to configure settings for the level 1 approvers appear.
5. Choose to save the glossary.
  - To save the current configuration and continue with the task immediately, click **Save and Continue**.
  - To complete the task, choose **Save and Finish**. The Analyst tool updates the approval workflow configuration settings.

## Approval Workflow for Kerberos Authentication

If you use Business Glossary approval in a domain with Kerberos authentication, you must enter the user name and password for the Model Repository Service in the Analyst Service. The user name and password are not mandatory when you create the Analyst Service, but they are required for the approval workflow to work in a domain with Kerberos authentication.

To ensure that the approval workflow works in a domain with Kerberos authentication, perform the following steps:

1. In the Administrator tool, click the **Services and Nodes** tab.
2. In the Domain Navigator, select the **Analyst Service**.
3. Edit the Model Repository Service properties.
4. In the **Edit Model Repository Service Properties** dialog box, enter the user name and password for the Model Repository Service.
5. Click **OK**.

## Data Steward Tasks

After the Glossary administrator enables the approval workflow, you can propose the Glossary assets for voting.

When you start the approval workflow for an asset, you must configure the voting end time for level 1 and level 2 voting. The Analyst tool adds the level 1 approvers to the workflow based on the settings configured by the Glossary administrator. You can add additional level 1 approvers before the approval workflow starts or when the voting is in progress. During the escalation interval, you can replace approvers or add additional approvers.

After the level 1 and level 2 voting ends, you can publish or reject the asset based on the voting results. If the approvers finish voting before the end time, you can conclude voting and advance the process to level 2.

If the progress of the approval voting is not as you expected, or if you want to modify the asset after the approval workflow starts, you can cancel the voting process. The Analyst tool changes the phase of the asset to Rejected. You can revise the asset and start the approval process again.

## Voting Dashboard

As a data steward, you can view the **Voting Dashboard** to see the progress of the approval workflow and the end times of level 1 and level 2. You can add additional approvers, cancel the approval workflow, or conclude the approval workflow based on the voting progress.

The following table describes the Voting Dashboard:

Property	Description
Conclude Voting	Conclude voting after all the approvers have voted. After you conclude voting in level 1, you can advance the approval workflow to level 2. Optionally, you can conclude voting to finalize the approval workflow before the end time. After you conclude voting, you can publish or reject the asset. After you conclude voting in level 2, you can publish or reject the asset.
Cancel Voting	Cancel the approval workflow if you want to stop the voting process. When you cancel the approval workflow during level 1, the Analyst tool cancels the level 2 voting and discards votes from level 1. When you cancel the approval workflow during level 2, The Analyst tool discards votes from both levels. When you cancel the approval workflow, the Analyst tool changes the phase of the asset to <b>Rejected</b> .
Voting Status	Describes the progress of the approval workflow. Displays one of the following statuses: <ul style="list-style-type: none"><li>- Voting In Progress</li><li>- Voting In Progress - Escalation Interval</li><li>- Voting Completed</li></ul>
Active Approvers	The list of approvers who can vote and details about their votes.
Replace Approver	During the escalation interval, replace the current approver with another approver. The new approver can cast their vote and the original approver cannot cast their vote.
Assign an Additional Approver	During the escalation interval, assign an additional approver to an existing approver. Either one of the two approvers can vote.
Replaced Approver	The list of original approvers who cannot vote.

## Proposing an Asset for Approval

As a data steward, you can propose an asset for approval when it is in the **Draft** phase. During the approval workflow, the phase of the asset is **In Review**.

The glossary administrator must enable the approval workflow for the glossary before you can propose the asset for approval.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Select the asset that you want to propose for review.  
The Analyst tool displays the business initiative, business term, category, or policy in the Glossary workspace.
4. From the **Actions** menu, select **Start Voting Process**.

The **Start Voting Process** wizard opens.

5. In the **Asset Approval Description** property, enter a description that provides approvers information about the asset change.
6. Set the end time for the level 1 and level 2 voting periods.
7. Optionally, in the **Additional Approvers** panel, add additional approvers who can vote.
8. Click **OK**.

The phase of the asset changes to **In Review** and the level 1 approvers receive a notification that they can vote.

## Modifying Approvers

As a data steward, you can replace existing approvers or add additional approvers during the escalation period. When you replace an approver with another approver, only the replaced approver can vote. The Analyst tool sends a notification to the task inbox of the replaced approver. When you add an additional approver to an existing approver, only one of the two approvers can vote. You cannot modify user groups.

The approval workflow must be in the escalation interval before you can modify approvers.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Select the asset that you want to modify.  
The Analyst tool displays the business initiative, business term, category, or policy in the Glossary workspace.
4. Click the voting icon to open the **Voting Dashboard**.
5. From the list of **Active Approvers**, select the approver that you want to replace or modify.
6. From the **Actions** menu, select **Replace Approver** or **Assign an Additional Approver**.  
The **Replace Approver** or **Assign an Additional Approver** dialog box opens.
7. Select a user.
8. Click **OK**.

## Advancing an Approval Workflow

As a data steward, you can advance an approval workflow from level 1 to level 2 after concluding the voting or after the level 1 voting end time.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Select the asset that you want to advance.  
The Analyst tool displays the business initiative, business term, category, or policy in the Glossary workspace.
4. From the Actions menu, select **Advance**.

## Canceling the Approval Workflow

As a data steward, cancel the approval workflow if you want to stop the voting process. The Analyst tool changes the phase of the asset to **Rejected** after you cancel the approval workflow.

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

3. Select the asset that you want to cancel.  
The Analyst tool displays the business initiative, business term, category, or policy in the Glossary workspace.
4. Click the voting icon to open the **Voting Dashboard**.  
The **Voting Dashboard** panel opens.
5. Click **Cancel Voting**.  
The Analyst tool discards the votes and disables the approval workflow.

## Concluding Voting

As a data steward, you can conclude voting before the end times of either level 1 or of level 2. If you conclude voting during level 1, you can advance the voting to level 2. If the glossary administrator has not enabled level 2 voting, you can publish or reject the asset. If you conclude voting during level 2, you can publish or reject the asset.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Select the asset for which you want to conclude voting.  
The Analyst tool displays the business initiative, business term, category, or policy in the Glossary workspace.
4. Click the voting icon to open the **Voting Dashboard**.  
The **Voting Dashboard** panel opens.
5. Click **Conclude Voting**.  
The Analyst tool displays the **Conclude Voting** dialog box.
6. Choose to conclude the approval workflow.
  - If you are in level 1, to conclude voting and not take any other action, select **Conclude**.
  - If you are in level 1, to conclude voting and advance the approval workflow from level 1 to level 2, select **Conclude Voting and Advance Asset**.
  - If you are in level 1 or level 2, to conclude voting and change the phase of the asset to **Rejected**, select **Conclude Voting and Reject Asset**.
  - If you are in level 1, to conclude voting and change the phase of the asset to **Published**, select **Conclude Voting and Publish Asset**.
  - If you are in level 2, to conclude voting and change the phase of the asset to **Published**, select **Publish Asset**.
  - If you are in level 2, to conclude voting and change the phase of the asset to **Rejected**, select **Reject Asset**.
7. Click **OK**.

# Approver Tasks

You can cast your vote after the approval workflow starts. If you choose not to vote, you can abstain from voting. Optionally, you can delegate your vote to another user if you have not voted. You cannot vote after you delegate your vote.

If you see the **Voting For** option on the **Voting Page**, use the option to cast your vote multiple times for the same Glossary asset. The **Vote For** option is available when another approver delegates their vote to you, you are part of a user group that is required to vote, or the data steward adds you as an additional or replaced approver. When you see an option to vote more than once, you must select whom you are voting for.

You can submit your vote again before the voting time ends, or before the data steward cancels or concludes the approval workflow. The Analyst tool always uses your most recent vote if you submit your vote more than once.

## Casting a Vote

As an approver, you can cast your vote before the approval workflow ends. The Analyst tool notifies you of pending votes through a notification in the Analyst tool header or in the **My Tasks** panel in the **Start** workspace.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Select the asset that you want to vote for.

The Analyst tool displays the business initiative, business term, category, or policy in the Glossary workspace.

4. Click the voting icon to open the voting page.  
The **Voting Page** panel opens.
5. Choose to cast or delegate your vote.
  - Select **Approve**, **Reject**, or **Abstain** to cast your vote. Click **Submit** to finish voting.
  - Click **Delegate**, and select another user who will vote on your behalf.
6. Optionally, add a comment.
7. Optionally, click **Voting Details** to see voting details from other approvers.

## CHAPTER 5

# Glossary Administration

This chapter includes the following topics:

- [Glossary Administration Overview, 64](#)
- [Business Glossary Architecture, 65](#)
- [Glossary Administration Tasks, 66](#)
- [Glossary Creation, 67](#)
- [Configuring Default Approvers, 68](#)
- [Glossary Customization, 68](#)
- [Export and Import, 73](#)

## Glossary Administration Overview

Administrators create glossaries, delete glossaries, change templates, and migrate glossary content in the **Glossary** and **Library** workspaces.

The service administrator and glossary administrator administer glossaries. The service administrator creates glossaries and assigns a glossary administrator to each glossary.

A glossary administrator performs the following glossary administration tasks:

### **Glossary customization**

Customizes how the Glossary asset properties appear to glossary consumers. A glossary administrator can create properties, create custom relationships, and change the position of the properties in the Glossary asset and business initiative layout.

### **Glossary import and export**

Exports the business terms or policies to a .xlsx or .zip file to move the current glossary to another glossary. Imports a glossary to the current instance from a source file that contains the exported data.

### **Approval process configuration**

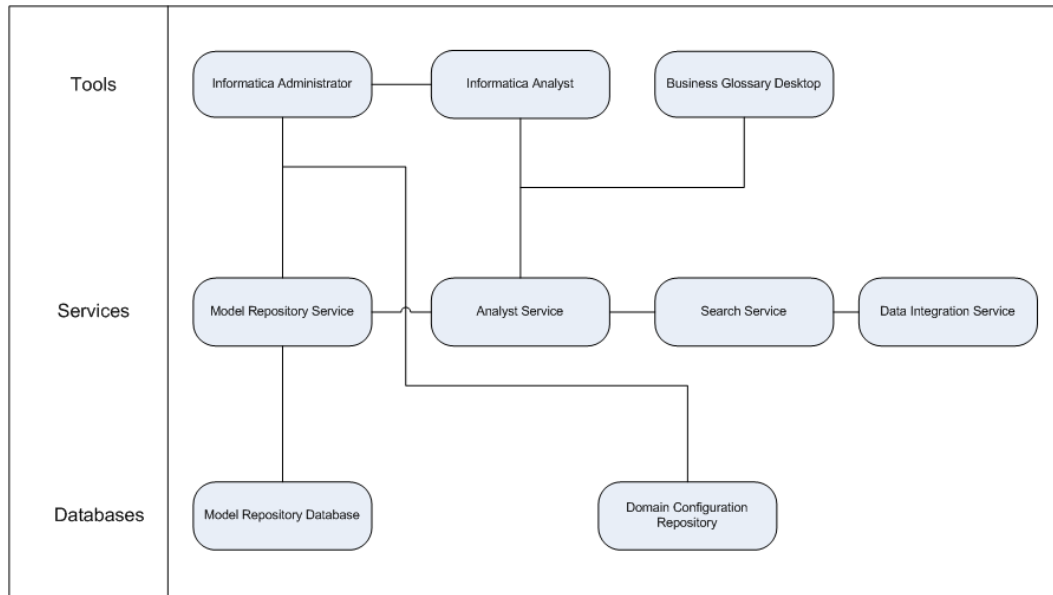
Configures the default approvers for simple approval or the approval workflow. Enables or disables the approval workflow and configures settings for the approval workflow.



# Business Glossary Architecture

The architecture consists of tools, services, and databases. The tools component consists of client applications. The services component has application services required to manage the tools, and perform tasks in Business Glossary. The databases component consists of the Model repository and Domain Configuration repository.

The following image shows the components of Business Glossary:



## Tools

Use the Informatica Administrator tool, Informatica Analyst tool, and Business Glossary desktop tool to access and manage Business Glossary.

Business Glossary works with the following tools:

### Informatica Administrator

A web-based client application that you can use to administer the Informatica domain and Informatica security. Create user accounts and groups in the Administrator tool.

### Informatica Analyst

A web-based client application that you can use to discover, analyze, and report on data and metadata of data sources. Log in to the Analyst tool to access Business Glossary.

### Business Glossary desktop

A software application that runs on your desktop from which you can look up glossary content.

## Services

Services are a run-time representation of applications that Business Glossary works with.

Business Glossary connects to the following services:

### Model Repository Service

An application service that manages the Model repository.

**Analyst Service**

An application service that runs the Informatica Analyst application in the Informatica domain. Manages the connections between service components and the users that have access to Informatica Analyst.

**Search Service**

An application service that manages search in the Analyst tool and Business Glossary desktop.

**Data Integration Service**

An application service that performs data integration tasks for the Analyst tool and the Developer tool.

**Databases**

Databases store Glossary assets and users.

Business Glossary connects to the following databases:

**Model repository database**

A relational database that stores Glossary assets.

**Domain configuration repository**

A relational database that stores users and roles.

## Glossary Administration Tasks

The service administrator and glossary administrator perform glossary administration tasks to create and manage glossaries. The service administrator can delegate administrative tasks to glossary administrators. Each glossary can have a different glossary administrator.

**Service Administrator Tasks**

The service administrator performs the following tasks to administer glossaries:

- Creates a glossary based on the requirements of the organization.
- Assigns an owner and data steward to the glossary.
- Assigns permissions to the owner and data steward for the glossary.
- Assigns the glossary administrator role to the user who manages users and performs other tasks in the glossary.

**Glossary Administrator Tasks**

The glossary administrator performs the following tasks to administer glossaries:

- Assigns permissions to users who access the glossary. Assigns privileges and permissions to users who create and manage business terms, policies, and categories.
- Configures the default approvers who participate in the approval process for asset review.
- Configures the settings for advanced approval.
- Creates custom properties and manages Glossary asset and business initiative templates.
- Imports and exports glossary content.
- Deletes a glossary.

# Glossary Creation

Create a glossary before you define categories, business terms, and policies. When you create a glossary, you must provide a name for the glossary. You can provide a description and assign a data steward and owner for the glossary. The data stewards and owners that you assign to a glossary are also assigned to the assets that content managers create in the glossary.

## Creating a Glossary

Create a glossary in the **Glossary** workspace. Configure the glossary properties when you create a glossary. The Analyst tool adds the owners and data stewards you add to the glossary to all the assets in the glossary.

1. From the **New** menu, select **Glossary**.  
The glossary panel opens in the **Glossary** workspace.
2. Configure properties to create the glossary.
3. Choose to save the glossary.
  - To save the current configuration and continue the task later, click **Save and Continue**. The Analyst tool creates a glossary with the current information and displays the glossary in edit mode.
  - To complete the task, click **Save and Finish**. The Analyst tool creates a glossary and displays the glossary in read mode.

### RELATED TOPICS:

- [“Glossary Properties” on page 101](#)

## Editing a Glossary

You can edit the properties of a glossary after you have created the glossary.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets**.
3. Choose the glossary that you want to edit.
4. Click **Edit** to edit the glossary.
5. Change the glossary properties.
6. Choose to save the glossary.
  - To save the current configuration and continue the task immediately or later, click **Save and Continue**. The Analyst tool updates the glossary and displays the glossary in edit mode.
  - To complete the task, click **Save and Finish**. The Analyst tool updates the glossary and displays the glossary in read mode.

## Deleting a Glossary

Delete a glossary to permanently delete all categories, policies, and business terms in the glossary.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Assets** and select **Glossaries**.
3. Right-click the glossary that you want to delete and click **Delete**.  
A confirmation dialog box appears.

4. Confirm that you want to delete the glossary.

## Configuring Default Approvers

Configure the approvers for a glossary. By default, the asset owners, stakeholders, and steward of related assets are the approvers. The content managers that you assign here review content during the normal approval process or participate in level 1 voting during the advanced approval workflow. For simple approval, only the content managers that you specify here receive a notification when the data steward sends the asset for review. If you have enabled advanced approval, the content managers you specify here are the default approvers for level 1.

1. Open the glossary for which you want to configure the default approvers.
2. Click **Edit** to edit the glossary.
3. Click the **Asset Approval Configuration** panel.
4. In the **Default Approvers** section, configure the default approvers.
5. Click **Save**.

## Glossary Customization

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.

Customize templates after you create and save the glossary but before you create Glossary assets and business initiatives. All Glossary assets and business initiatives that you create in the current glossary use the customized template.

You can make the following changes to the Glossary asset and business initiative templates:

### **Change template layout.**

Move and arrange properties to change the visual layout of a business term, business initiative, category, or policy page. Change template layout to organize and plan the order of the properties based on your requirements. You can move properties that are more relevant to you to the top of the page or move properties that you rarely use to the bottom of the page.

For example, as a glossary administrator you can change the layout of a business term template by moving "Rules" property to the top of the list of properties in the **General** section.

To make these changes, drag elements on the page or use keyboard shortcuts.

### **Create custom relationships.**

Create custom relationships if the default relationships do not meet the requirements of the organization. Use custom relationships to relate business terms. The name that you provide to the custom relationship helps consumers understand how the terms are related. You cannot delete the custom relationship after you create it.

For example, create a custom relationship called "Sibling." Use this custom relationship to help consumers understand that the term "Principal Engineer" is in the same grade as the term "Associate Manager."

#### **Change or create properties.**

Create properties and insert them into the Glossary asset or business initiative template. When you create a property, it is available for use across the asset templates in all glossaries. You cannot delete a property that you use in a template.

You must specify the label and model of the property. The model defines the name, description, and data type for the property. The data type defines the type of input value that the content manager can provide for the property. You can change the label of the property in each glossary and the property will have a unique name in each glossary. When you change the label, you can specify a default value for the property.

For example, you are the glossary administrator for a legal glossary and you require terms to have a citation ID. Create a property called "Citation ID." The data type for the property is Integer. Add the property to the business term template for the current glossary. Content managers must provide an Integer value for the "Citation ID" property when they define the terms.

## Property Model and Label

Configure the Glossary asset and business initiative templates to create custom properties or custom relationships. Apart from default Business Glossary relationships, content managers can use custom relationships based on the needs of the organization to relate terms.

Use the **Property Model** panel to define a custom property. Values that you configure or change in the **Property Model** panel is available in all glossaries. All glossary administrators can add the custom property or custom relationship that you create to the template in the glossary that they manage.

After you create a property, glossary administrators can customize the **Property Label Definition** panel values to change how the property appears in the glossary that they manage. Glossary administrators can change the description of the property label and specify a default value for the property. Multiple glossary administrators can specify unique values to the **Label** property to change the name of the property.

A property can have unique labels in different glossaries. The label of the property in the current glossary does not change when a glossary administrator changes the label in another glossary. The **Where Used** panel shows the glossary where the custom property is used.

#### **Example**

You create a custom property with the label **Use Case** and the string data type. In the finance glossary, the glossary administrator can change the label from **Use Case** to **Business Case**. In the human resources glossary, the glossary administrator can change the label from **Use Case** to **Scenario**. The name of the property in the global list remains as **Use Case** and the data type remains as string. Other glossary administrators can only change the label of the property, but cannot change the data type from string to integer or other options.

## Property Model

The property model defines properties such as name, description, and data type.

You can configure the following properties in the **Property Model** panel:

#### **Name**

Property name.

A glossary administrator cannot change the property name.

**Note:** If you create business glossary resources in Metadata Manager, do not use any of the following special characters in the property name: ~ ' & \* ( ) [ ] | \ : ; " ' < > , ? /

Metadata Manager does not extract custom properties with names that contain any of these characters.

Metadata Manager does extract custom properties with the following special characters in the property name: ! @ # \$ % ^ \_ - + = { } . ' .

### Description

Description of the property.

A glossary administrator can change the description of the property.

### Value

Type of value that the property can hold. A glossary administrator cannot change the value type in another glossary.

You can set the following options for the value property:

- Single Value. Indicates that the property can have only one value.
- Multi-value. Indicates that the property can have more than value.

Default is Single Value.

### Datatype

Type of input for the custom property. A glossary administrator cannot change the data type.

You can configure the following values for the data type property:

- String. Indicates alphanumeric text. The maximum length of the alphanumeric text is 4000 characters.
- Integer. Indicates integer input.
- Boolean. Indicates a boolean input.
- Date and Time. Indicates date and time. The content manager can select the date from a calendar.
- Enum. Indicates that the content manager must provide an input from a list of enumerated values. You can define the list of values in the **Values** section after you select this option.
- Long String. Indicates that the content manager can format the content in the property with rich text. There is no limit on the number of characters that the content managers can use when adding content to this property. The Search service does not index content added to the custom property of long string data type.

Default is String.

### Search Rank

Priority of the current term in the list of search results when the user searches for the value of the property. A glossary administrator can change the search rank of the property.

You can set the search rank to one of the following values:

- High. Indicates that the importance of the value entered for this property is high and the current term is listed on top of the search results.
- Medium. Indicates that the importance of the value entered for this property is medium and no priority is attached to the search results.
- Low. Indicates that the importance of the value entered for this property is low and the current term is listed at the bottom of the search results.

Default is medium.

You can select the following option in the **Options** section:

#### **Searchable**

Select the checkbox to make the property searchable. If the checkbox is selected, the Search Service indexes the values in this property. A glossary administrator can change the **Searchable** property.

This property is not selected by default.

## Property Label Definition

Configure the label definition to customize the property in the current glossary. Different glossaries can have unique values for the properties in the **Property Label Definition** panel.

You can configure the following properties in the **Property Label Definition** panel:

#### **Label**

Display name for the property in the current glossary.

#### **Label Control**

Type of input field. This property is a function of the data type and value that you select in the **Property Model Definition** panel.

You can select one of the following values depending on the data type and value that you select in the **Property Model Definition** panel:

- Textbox. Indicates that the display field is a text box.
- Listbox. Indicates that the display field presents a list of options that you can choose from.
- Listgrid. Indicates that the display field appears in the form of a column. You can add rows to this column and enter your values in the rows.

#### **Default Section**

Position of the property in the layout of the page.

You can place the property in one of the following sections:

- General. Indicates that the property appears in the **General** section.
- Status. Indicates that the property appears in the **Status** section.
- People. Indicates that the property appears in the **People** section.
- Context. Indicates that the property appears in the **Context** section.
- Related Assets. Indicates that the property appears in the **Related Assets** section.
- Attachments. Indicates that the property appears in the **Attachments** section.

You can select the following option in the **Options** section:

#### **Required**

Use this option to make it mandatory for the content manager to provide a value for this property. When you select the checkbox, the content manager must enter a value for this property to define a business term or policy.

This property is not selected by default.

#### **Default Value**

Use this option to specify a default value for the property.

The **Default Value** option is enabled when you select **Required**. You can add default values for single valued properties that you add to an asset template.

## Creating Properties

You can create a custom Glossary asset or business initiative property after you save the glossary. The property that you create is available across all glossaries. You or another glossary administrator can use the custom property in the Glossary template to customize a glossary.

1. Open the glossary where you want to create a property.
2. Click **Edit** to edit the glossary.
3. Click the **Business Term Template, Policy Template, Category Template, or Business Initiative Template** panel.
4. In the **Available Business Term Template Properties** panel, click the **Add** icon.
5. Configure the properties in the **Property Model** and **Property Label Definition** panels.
6. Click **Save**.

## Creating Custom Relationships

Create a custom relationship when you want to link two business terms using a relationship which is not available in the Analyst tool. Content managers can use the custom relationship from the **Related Assets** section when configuring the business term properties.

1. In the Analyst tool header, open **Glossary Relationships** under **Manage**.
2. Click the Add icon.  
The **Create Custom Relationship** dialog box opens.
3. Specify if the relationship is bidirectional.
4. For a unidirectional relationship, specify the name of the primary relationship.
5. Optionally, specify a name of the derived relationship if you have chosen to create a bidirectional relationship.
6. Optionally, specify the color of the line that the Analyst tool uses to connect the related business terms in the relationship view diagram.
7. Click **OK**.

## Modifying Relationships

When you modify a relationship, you can change the color of the line that the Analyst tool uses to join related assets in the relationship diagram. For the custom relationships, you can also modify the direction.

1. In the Analyst tool header, open **Glossary Relationships** under **Manage**.
2. Click the edit icon next to the relationship name that you want to modify.  
The **Edit Custom Relationship** dialog box opens if you are editing a custom relationship. The **Edit Default Relationship** dialog box opens if you are editing a default relationship.
3. Modify the relationship properties.
4. Click **OK**.



## Customizing Properties

Change the label and position of properties to customize the Glossary asset or business initiative template in the current glossary. You can change the default property, or property that another glossary administrator created. The Analyst tool applies that changes to properties in the current glossary.

1. Open the glossary which contains the default property that you want to edit.
2. Click **Edit** to edit the glossary.
3. Click the **Business Term Template, Policy Template, Category Template, or Business Initiative Template** panel.
4. Click the property that you want to edit.  
Options to edit or move the property appear.
5. Click the **Edit** icon.
6. In the **Available Business Term Template Properties** panel, change the properties under the **Property Label Definition** and **Property Model** panels.
7. Optionally, use the arrows to move the property.
8. Click **Save**.

## Changing the Business Term or Policy Layout

Change the Glossary asset or business initiative layout after you save the glossary. When you change the layout, you customize how the Glossary asset or business initiative page appears to glossary consumers.

1. Open the glossary which you want to customize.
2. Click **Edit** to edit the glossary.
3. Click the **Business Term Template, Policy Template, Category Template, or Business Initiative Template** panel.
4. Select the property that you want to move.
5. Use the arrows to move the property.
6. Optionally, click the **Delete** icon to remove the property from the page. You can remove custom properties and not default properties.
7. Click **Save**.

## Export and Import

Export to move the contents of the current glossary. Import to transfer contents of a glossary to the current glossary. You can export one or more glossaries to an .xlsx file. Import a glossary from an .xlsx file that you exported to move the contents of the glossary.

You can export the asset template or Glossary assets and business initiatives. When you export the templates, any customization that you made is in the .xlsx file.

Import the .xlsx file into the target instance of Business Glossary after you have exported the assets from the source instance. The target instance and the source instance can be the same. The .xlsx file contains multiple worksheets that you can customize before import. You can view and edit the glossary assets after you have imported the .xlsx file into the target instance.

For example, you are moving from a test instance to a production instance of Business Glossary. The test instance contains glossary assets published after approval. You can export the glossaries from the test instance and import the .xlsx to the production instance to move the glossaries.

## Export File Description

When you perform an export, the Analyst tool saves the export information to multiple worksheets in an .xlsx format. You can use Microsoft Excel to edit the contents of the .xlsx file.

The following table describes the tabs that appear in the export file:

Tab	Description
Global Attributes	All the business term and policy properties. Optionally, use this tab to create properties that glossary administrators can use in the Glossary asset and business initiative templates.
Global Relationships	All the business term relationship properties. Optionally, use this tab to create custom relationships that glossary administrators can use in the related terms attribute.
Glossaries	The glossaries that you exported.
Term Templates	Details about the business term template. Do not edit columns in this tab. To modify the term template use the Analyst tool.
Policy Templates	Details about the policy template. Do not edit columns in this tab. To modify the policy template use the Analyst tool.
Category Templates	Details about the category template. Do not edit columns in this tab. To modify the category templates use the Analyst tool.
Initiative Templates	Details about the business initiative template. Do not edit columns in this tab. To modify the business initiative template use the Analyst tool.
Categories	The categories that you exported. Use this tab to edit values of the category property details. Note: The users you assign as data stewards, stakeholders or owners to categories must exist in Informatica Administrator.
Policies	The policies that you exported. Use this tab to edit values of the policy details. Note: The users you assign as data stewards, stakeholders or owners to policies must exist in Informatica Administrator.
Terms	The business terms that you exported. Use this tab to edit values of the business term property details. Note: The users you assign as data stewards, stakeholders or owners to business terms must exist in Informatica Administrator.
Initiatives	The business initiatives that you exported. Use this tab to edit values of the business initiative property details. Note: The users you assign as data stewards, stakeholders or owners to business initiatives must exist in Informatica Administrator.
Synonyms	The synonyms that you exported. Use this tab to edit values of the synonym property details. Note: The users you assign as data stewards, stakeholders or owners to synonyms must exist in Informatica Administrator.

Tab	Description
Rules	Details about rules and their relationship with policies and business terms. Optionally, use this tab to add a rule that glossary administrators can link to terms in the Analyst tool.
AssetLinks	Details about linked assets and their relationship with business terms. Optionally, use this tab to edit asset link properties, or add a new asset link. Content managers can link the assets to the terms in the Analyst tool.

For more information about the data in the business glossary export file, see the Informatica How-To Library article "Business Glossary Export File Description": <https://mysupport.informatica.com/docs/DOC-12266>.

## Example

There are many business terms in the human resources glossary. The name of the organization that you work for changed. You want to change the name of the organization in the description of all the business terms in the human resources glossary.

When you have to change data for many Glossary assets, you can export the assets to an .xlsx file and use Microsoft Excel to update the content. You can change the name of the organization in all instances in the .xlsx file. You can import the .xlsx file to Business Glossary after you make changes to the .xlsx file. When you import the .xlsx file, the existing glossary is updated. Use this method to prevent the Analyst tool from creating a revision of every published Glossary asset that you want to change.

## Conflict Resolution

When you import an .xlsx file, the Analyst tool compares the data in the file with the data in existing glossaries. You can resolve conflicts that Analyst tool detects between the data in the .xlsx file and the data in existing glossaries.

The Analyst tool can detect and inform you of the following types of errors during import:

### Match by asset ID.

The Analyst tool compares the asset IDs of the Glossary assets in the .xlsx file with the asset IDs present in existing glossaries. Every asset must have a unique asset ID. If the asset ID in the .xlsx file matches another asset ID in a glossary, the Analyst tool gives you options to skip the import of conflicting asset, replace the existing asset, or create a copy of the existing asset.

### Match by name.

The Analyst tool compares the names of the Glossary assets in the .xlsx file with the names of assets present in existing glossaries. If the asset name in the .xlsx file matches more than one name in the glossary, the Analyst tool ignores the conflict and imports the data. If the asset name in the .xlsx file matches with the name of another similar asset in the glossary, the Analyst tool gives you an option to replace the existing asset, or create a copy of the existing asset. Glossaries can have multiple assets with the same name.

The Analyst tool handles the export of assets which have the **Pending Publish** phase automatically. If the business initiative corresponding to the assets which are in the **Pending Publish** phase is not available as part of the export, the Analyst tool changes the phase of those assets to **Published** in the exported file.

## Glossary Export Properties

Configure the glossary export properties when you export a glossary. The export wizard provides options that you can configure in each step. You can filter assets to export based on the status and phase. You can select assets to export based on the categories.

The following table describes the properties in the export wizard:

Wizard Page	Property	Description
Select Glossaries	Glossaries	Select one or more glossary that you want to export.
Specify Settings	Assets	Select the assets that you want to export based on the status and phase.
Specify Settings	Include Linked Assets from other Glossaries	Export linked assets from other glossaries. This option is enabled by default.
Specify Settings	Include Attachments to Assets	Include the attachments with the export file. The Analyst tool exports a .zip file when you select this option.
Specify Settings	Include Audit History	Export the audit history of the assets. The Analyst tool exports a .zip file when you select this option.
Specify Settings	Export rich text as plain text	Export content, which is formatted as rich text, as plain text.
Select Assets	Assets in Selected Categories	Select assets to export based on their categories.

## Exporting Glossary Assets and Templates

You can export Glossary assets and templates for a single glossary or multiple glossaries. Based on the configuration settings, the file that you export is in .xlsx format or .zip format.

The administrator must configure the temporary export file directory in the Analyst service before you can export the glossary assets and templates.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Glossaries**.
3. Right-click on a glossary and click **Export Glossary Assets and Templates**.  
The **Export** dialog box appears.
4. In the **Select Glossaries** page, choose the glossary you want to export.
5. In the **Specify Settings** page, include assets you want to export based on the Business Glossary asset status and phase.
6. In the **Specify Settings** page, specify if you want to include linked assets from other glossaries, attachments, and the audit trail.
7. In the **Select Assets** step, select the Glossary assets you want to export based on the categories.
8. In the **View Summary** step, verify the export details.
9. Click **Export**.
10. Select a location on your computer where you want the Analyst tool to download the export file.

## Exporting Glossary Templates

You can export Glossary templates for a single glossary or for multiple glossaries. The file that you export is in .xlsx format.

The administrator must configure the temporary export file directory in the Analyst service before you can export the glossary templates.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Glossaries**.
3. Right-click on a glossary and click **Export Glossary Templates**.

The **Export** dialog box appears.

4. Choose the glossaries that you want to export.
5. Click **OK**.

The Analyst tool prepares the export file for download.

6. Select a location on your computer where you want the Analyst tool to download the export file.

## Glossary Import Properties

Configure the glossary import properties when you import a glossary. The import wizard provides options that you can configure in each step.

The following table describes the properties in the import wizard:

Wizard Page	Property	Description
Specify Settings	Include Attachments to Assets	Include the attachments with the import file. This option is enabled by default.
Specify Settings	Include Linked Assets from other Glossaries	Choose this option if you want details about assets linked from other glossaries to be included in the current import file. This option is enabled by default.
Specify Settings	Include Audit History	Import the audit history of the assets. If you are importing glossaries from version 9.5.1, the business glossary data is an XML file.
Specify Settings	Include rich text content for conflicting assets	Import formatted rich text. Choose this option for properties that have rich text or are of long string data type. Specify if the Analyst tool must import data from the import file when there are conflicting assets.
Select Assets	Assets to Import	Select the assets in the available categories, that you want to import.
View Summary	Replace the glossary assets with the imported assets	Select this option if you want to discard the conflicting assets that are already in the glossary and replace them with assets from the import file.
View Summary	Create a copy of the conflicting assets	Select this option if you want to preserve the conflicting assets that area already in the glossary by creating a copy. The analyst tool does not delete the existing assets.
View Summary	Do not import the conflicting assets.	The Analyst tool skips the import of conflicting assets.

**Note:** If you want to import business glossary assets as plain text into the Analyst tool, you must add the `-DimportAsPlainText=Y` or `-DimportAsPlainText=y` property in the JVM Command Line Options of the Analyst Service in Informatica Administrator.

## Importing a Glossary

Use the wizard to import Glossary assets or templates to the Analyst tool. Information about the Glossary assets and templates that you want to import must be in an .xlsx or .zip file. If you are upgrading business glossaries from version 9.5.1 of Metadata Manager, you can select an XML file to import to the Analyst tool. You can run only one import task at a time.

1. Click **Open** to open the **Library** workspace.
2. In the Library Navigator, click **Glossaries**.
3. Right-click on a glossary and click **Import Glossary Assets and Templates**.  
The **Import** wizard appears.
4. Click **Browse** to select an .xlsx, .zip or XML file that contains Business Glossary data.
5. Click **Next**. If you see an error message, review the details in the log file and start the import process again.
6. Specify if you want to include attachments, linked assets from other glossaries, and the audit trail in the **Specify Settings** page and click **Next**.
7. Select the Glossary assets you want to import based on the categories in the **Select Assets** page and click **Next**.  
The Analyst tool displays a summary of data in the .xlsx, .zip or XML file.
8. If the Analyst tool detects that you are importing duplicate assets, you see options to resolve the conflict. Make a selection from the available options.
9. Optionally, review the summary of assets to be imported and details about the assets you selected to import.
10. Click **Import**.
11. Optionally, choose to allow the import task to run in the background in the **Import Status** page. The Analyst tool sends you a notification once the import task is complete.

## Importing Templates

Use the wizard to import glossary templates from another glossary or Metadata Manager to the Analyst tool. Information about the templates that you want to import must be in an .xlsx file or .xml file. You can run only one import task at a time.

1. Click **Open** to open the **Library** workspace.
2. In the Library navigator, click **Glossaries**.
3. Right-click on a glossary and click **Import Glossary Templates**.  
The **Import** wizard appears.
4. Click **Browse** to select an .xlsx or .xml file that contains Business Glossary data.
5. Click **Next**
6. Select the glossaries you want to import the assets templates for.
7. Click **Import**.  
The Analyst tool imports the templates from the .xlsx or .xml file.
8. In the **Message** dialog box, click **OK**.

## Export and Import Glossaries and Templates Using infacmd

You can use infacmd to export and import business glossaries. Use the commands when you want to export or import a number of glossaries without accessing the Analyst tool. Files that you export or import are in the .xlsx or .zip format.

The infacmd includes the following business glossary commands:

### **listGlossary**

Lists the names of business glossaries which are available in the Analyst tool. Use listGlossary to identify the glossaries that you want to export.

### **exportGlossary**

Exports export business glossaries available in the Analyst tool. Choose to export cross glossary links, audit history, attachments, and templates to the .xlsx or .zip file using the options in the command.

### **importGlossary**

Imports business glossaries to the Analyst tool. Choose to include cross glossary links, audit history, attachments, and templates when you import glossaries from the .xlsx or .zip file using the options in the command. You can also resolve conflicts that occur when assets have a similar name or ID.

For more information about the business glossary commands, see the *Informatica Command Reference*.

## CHAPTER 6

# User and Role Administration

This chapter includes the following topics:

- [User and Role Administration Overview, 80](#)
- [User Management Process, 81](#)
- [Glossary Security Workspace, 81](#)
- [Permissions, 82](#)
- [Roles, 83](#)
- [Privileges, 85](#)
- [Assigning Roles or Privileges, 86](#)
- [Editing Roles or Privileges, 86](#)
- [Role and Privilege Relationship, 86](#)
- [Frequently Asked Questions, 87](#)

## User and Role Administration Overview

The service administrator and glossary administrator perform user and role administration tasks. The service administrator creates Business Glossary users and groups in the Administrator 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.

After a service administrator creates Business Glossary users and groups in the Administrator tool, the glossary administrator can manage them in the **Glossary Security** workspace. From the **Manage** menu, select **Glossary Security**.



# User Management Process

As a glossary administrator, manage users based on the tasks that users need to perform.

A user can access one or more glossaries. A user can have unique privileges, roles, and permissions for different glossaries. For example, Joe can be a data steward for the human resources glossary. Joe can also be a glossary consumer for the sales glossary. Manage roles, privileges, and permissions for each glossary based the tasks that a user performs in a glossary.

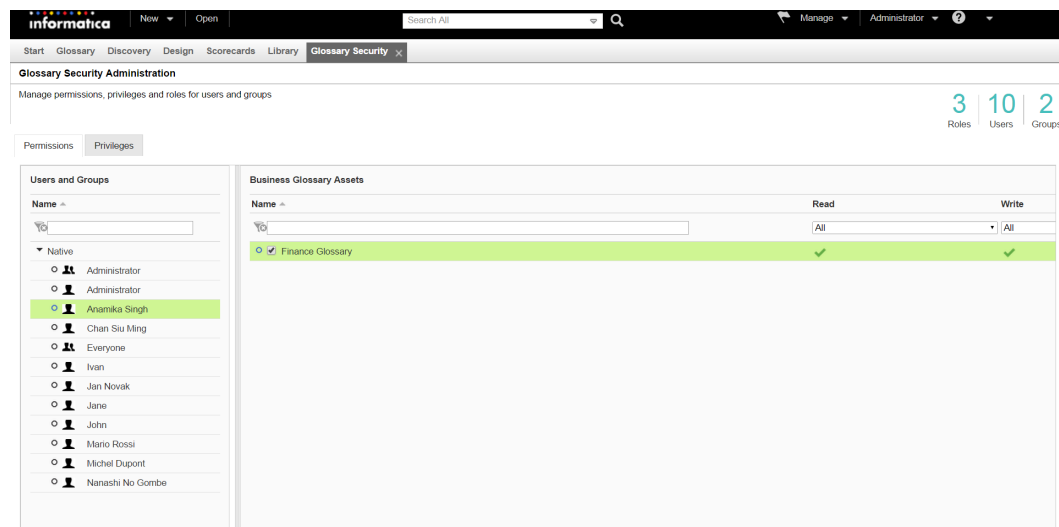
The following process describes how to manage a user or group:

1. Verify that the user account or group exists in Informatica Administrator.
2. Identify the glossaries that the user has access to.
3. Configure user or group permissions for the Glossary asset. Assign permissions based on the level of access that you want to provide.
4. Identify a default role for the user based on the tasks that you want the user to perform.
5. Assign the default role to the user or group.
6. Optionally, create a custom role with privileges and assign the role to the user or group.
7. Optionally, assign privileges directly to the user or group.

## Glossary Security Workspace

Perform the user and role administration in the **Glossary Security** workspace. The **Glossary Security** is a temporary workspace.

The following image shows the **Glossary Security** workspace:



The following table describes the panels of the **Glossary Security** workspace:

Workspace Panel	Description
Permissions	Manage permissions for users and groups.
Privileges	Manage privileges for users and groups.
Users and Groups	Lists all users and groups that the service administrator creates in Informatica Administrator.
Glossary Assets	Lists the Glossary assets for which you assign permissions or privileges.

## Permissions

Permissions determine the Glossary assets that a user can access and the level of access to the asset. You can assign permissions to users for a business term, business initiative, category, policy, or the entire glossary. Permissions that you assign to a user for a glossary extend to business terms, business initiative, categories, and policies in the glossary.

Users require the write permission to perform actions based on the privileges that you assign. Users require the read permission to view Glossary assets in the **Library** workspace. Use the Deny permission to hide Glossary assets from a user or disallow the user from performing Glossary asset management tasks. Use the Allow permission to permit a user to view Glossary assets or perform Glossary asset management tasks.

When you select a default role while assigning privileges to a user or a group, the Analyst tool assigns permissions accordingly. When you assign the stakeholder role, the Analyst tool assigns the read permission to the user or group. When you assign the data steward or glossary administrator role, the Analyst tool assigns the read and write permissions to the user or group.

Users and groups can have the following types of permissions:

### Direct permissions

Permissions that you assign directly to a user or group, or which the Analyst tool assigns based on the default role.

### Inherited permissions

Permissions that users who are part of a group inherit based on the group membership. You cannot revoke inherited permissions directly from the user. Permissions that you assign directly to a user takes precedence over inherited permissions when there is a conflict. If you have directly assigned a user a permission and you want the user to inherit permission instead, choose the inherit option when you edit permissions.

For example, if you assign the sales group the permission to view the sales glossary, all the users who are part of the sales group can view the sales glossary. If a user does not have permission to view the sales glossary due to a direct permission, and you add the user to the sales group, the direct permission of the user takes precedence. To ensure that the user always inherits permissions and to enable the user to view the sales glossary, edit the permission of the user and choose the inherit option.

### Effective permissions

Superset of all permissions for a user or group. Includes direct permissions and inherited permissions.

## Assigning Permissions

As a glossary administrator, assign permissions to a user or group to control access to glossaries and assets. A user or group inherits permissions to all the assets which are part of a glossary, when you assign permissions for the glossary. You can filter Glossary assets by glossary and category to assign permissions for specific assets.

1. In the **Glossary Security** workspace, click the **Permissions** tab.  
The list of users and groups appears in the **Users and Groups** panel.
2. Select a user or group to assign permissions.
3. From the **Actions** menu, select **Add**.  
The **Add Permissions** wizard appears.
4. Select the Glossary asset for which you want to add permissions to the user.
5. Optionally, to assign permissions for specific assets, filter the assets based on the name, glossary, category or type.
6. Click **Next**.
7. Select the permission that you want to assign to the user or for the read and write actions. To assign permissions for multiple assets, select the asset before you assign the permission.

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

8. Optionally, to bulk assign permissions for multiple assets, select the assets and select an option from the **Read** and **Write** drop down menus.
9. Click **Save**.

## Roles

A role is a collection of privileges that you assign to a user or group. You can use default roles or create custom roles.

### Default Roles

Default roles are based on frequently performed tasks that users perform.

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

#### **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.

## Custom Roles

A custom role is a role that you create, edit, and delete based on the needs of the organization. The custom role that you create in one glossary is available in all glossaries.

Some functional roles, such as the business term owner, are not associated with a default role. Create a custom role for the owner and assign privileges for tasks that an owner might perform. For example, the owner might require privileges to assign stakeholders. Assign the privilege to assign stakeholders to the custom owner role.

### Creating a Role

Create a role if the default roles in Business Glossary do not meet the requirements of the organization.

1. In the **Glossary Security** workspace, click the **Privileges** tab.  
The list of users and groups appears in the **Users and Groups** panel.
2. From the **Actions** menu, select **Role Management**.  
The **Role Management** dialog box appears.
3. In the **Roles** section, click the **Add** icon.
4. Specify a name and description for the role.
5. Select the privileges that you want to add to the role.
6. Click **Save**.

# Privileges

Assign privileges to determine the tasks that a user can perform in a glossary.

If a user has the permission to access a glossary, the user requires privileges to create and manage Glossary assets in the glossary.

Users and groups can have the following types of privileges:

## Direct privileges

Privileges that you assign directly to a user or group.

## Inherited privileges

Privileges that users who are part of a group inherit from the privileges that you assign to the group. You cannot revoke inherited privileges from the user.

## Effective privileges

Superset of all privileges for a user or group. Includes direct privileges and inherited privileges.

## Privileges Description

Use privileges to control the tasks that users can perform in a glossary.

The following table describes the privileges:

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

# Assigning Roles or Privileges

Assign a role or privileges to a user or group to control the tasks that the user or users in the group can perform. You can add different roles or privileges to the same user for different glossaries.

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 the user to whom you want to assign roles or privileges.
3. From the **Actions** menu, select **Add**.  
The **Add Privileges and Roles** wizard appears.
4. Select the glossary for which you want to add roles or privileges to the user, and click **Next**.
5. Select the roles or privileges that you want to assign to the user.
6. Click **Save**.

# Editing Roles or Privileges

Edit roles or privileges that you have assigned to a user or group to change the tasks that the user can perform.

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 the user to whom you want to edit roles or privileges.
3. Select the glossary for which you want to edit roles or privileges for the user.
4. From the **Actions** menu, select **Edit**.  
The **Edit Privileges and Roles** wizard appears.
5. Select the glossary for which you want to edit roles or privileges for the user, and click **Next**.
6. Change the roles or privileges that you want to reassign to the user.
7. Click **Save**.

# Role and Privilege Relationship

Understand the relationship between privileges and default roles to determine the tasks that users with default roles can perform.

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

Privilege	Glossary Administrator	Data Steward	Stakeholder
Add Comments	Yes	Yes	Yes
Assign Stakeholders	Yes	Yes	No
View Assets	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

## Frequently Asked Questions

Review the frequently asked questions to understand how to manage users and roles for example scenarios.

**My team does not have an administrator dedicated to Business Glossary. The data stewards in my organization need to perform all tasks except user management. I want the administrator to manage users. How can I manage roles?**

Create two custom roles and assign privileges for specific tasks that you want the data stewards and glossary administrator to perform. Assign the custom roles to the users who need to be data stewards and the administrator.

**Glossary consumers in my organization belong to a group called reference users. Glossary consumers need not add comments to Glossary assets. But one user who is part of the reference users group needs privileges to add comments. How can I manage privileges for the user?**

Disable the privilege to manage comments for the reference users group. All users who are part of the group cannot add comments because they inherit privileges that you assigned to the group. For the user who is part of the group, but needs to add comments, assign a direct privilege to manage comments. The direct privilege takes precedence over inherited privileges and the user can add comments.

**A Glossary asset owner in my organization participates in the approval process and assigns stewards to a Glossary asset. How do I manage the user who performs the task of the owner?**

You can use a combination of roles and privileges to manage the user. Assign the stakeholder role and the privilege to assign stewards to the user. The effective privileges of the user are a combination of the privileges of the stakeholder role and the privilege that you assigned directly. Also add read and write permissions to the user for the Glossary asset.

**An employee just joined my team and needs to be the data steward for the sales glossary, and glossary consumer for the human resources and finance glossaries. How can I manage the new employee?**

Glossary administrators for the sales, human resources, and finance glossaries handle permissions and privileges for the employee.

The glossary administrator for the sales glossary must assign the following permissions and privileges to the employee for the sales glossary:

- Data steward role to allow the user to create and manage content.
- Write permission because the user must be able to write to the glossary to create and manage content.
- Read permission because the user must be able to read content in the glossary.

Glossary administrators for the human resources and finance glossaries must assign read permission to the employee for the human resources and finance glossaries. The employee can have different permissions and privileges for each glossary.

**How can I assign two users to perform data stewardship tasks for Glossary assets?**

To assign more than one user as a data steward, the service administrator must add the users to a group. The glossary administrator can assign the data steward role to the group. When creating the Glossary asset, the content manager can add the group as the data steward for the asset.

**How can I remove a user who is currently performing the role of a data steward?**

The glossary administrator for the glossary that the data steward no longer manages must use the Glossary Security workspace and revoke write permission and the data steward role for the user.

**A business leader needs to review content in a glossary and be the stakeholder for some business terms and policies in the glossary. How can I manage privileges and permissions?**

The default stakeholder role has a privilege to review drafts. Assign the stakeholder role to enable the user to review draft content for all Glossary assets in the glossary. Add write permission to the user only for the business terms and policies for which you want the user to be a stakeholder. Without write permission for other assets, the user cannot perform stakeholder tasks on those assets.

**A user who is assigned the stakeholder role is unable to read drafts of some business terms. What changes should I make?**

Verify that the user has read permission for the business terms. Without read permission, users cannot read content even with the appropriate privileges.



# APPENDIX A

## Glossary Asset Properties

This appendix includes the following topics:

- [Business Term Properties, 89](#)
- [Policy Properties, 95](#)
- [Category Properties, 97](#)
- [Business Initiative Properties, 99](#)
- [Glossary Properties, 101](#)

### Business Term Properties

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.

Business terms contain properties in the following sections:

#### **General**

Contains global properties, such as name, relationships to other terms, and link to policies.

#### **Status**

Contains properties about the current status and phase of the business term. The status indicates the validity of the business term. The phase changes based on the tasks that the content managers perform.

#### **People**

Contains properties to identify content managers for the term.

#### **Context**

Contains properties to define the context, such as description, usage context, and example.

#### **Related assets**

Contains properties to track related assets, such as related terms, data assets, and rule assets.

#### **Attachments**

Contains properties to attach documents, images, and other kind of files to the business term.

#### **Activity**

Contains properties to track activity, such as history and comments.

The **Activity** and **Related Assets** sections are visible when you open a business term.

**Note:** You might see a different set of properties in the business term if the glossary administrator modified the business term template.

## RELATED TOPICS:

- [“Creating an Asset” on page 37](#)
- [“Business Terms” on page 37](#)
- [“ Edit an Asset in the Glossary Workspace” on page 26](#)

## General Properties

The **General** section contains global properties, such as name, relationships to other terms, and link to policies.

Business terms contain the following properties in the **General** section:

### **Name**

Business term name.

### **Synonyms**

Names that are synonymous with the current business term.

A business term displays the following properties for a synonym:

- Name. The name of the synonym.
- Context. Indicates how the synonym and business term are synonymous.
- Status. Indicates if a synonym is valid. The status can be active or inactive.
- Retirement Date. The date after which a synonym in active status changes to inactive status. The Analyst tool changes the status based on the retirement date the content manager sets.

For example, "mortgage" is used as a synonym for "loan." Mortgage is the term used in the context of a loan borrowed to purchase property.

### **Categories**

A descriptive classification of the business term. The categories appear as a link to open the category.

For example, the business terms "portfolio" and "stocks" might be associated with the "investments" category.

### **Business Initiative**

A business initiative to which the business term belongs.

### **See also**

Terms that are similar or related to the current term. The terms appear as a link to open the term. This is a bi-directional relationship.

For example, if the current business term is "interest," the related terms can be "fixed interest" and "floating interest."

**Note:** You can remove the business terms that are related using the see also relationship only when you edit the term which is the primary asset in the bidirectional relationship. You cannot remove related business terms when you edit the term which is the derived asset in the bi-directional relationship.

### **Not same as**

Terms that are similar to the current business term but have a different business purpose. The terms appear as a link to open the term. This is a bi-directional relationship.

For example, the term "payroll" is not the same as the term "salary."

**Note:** You can remove the business terms that are related using the not same as relationship only when you edit the term which is the primary asset in the bidirectional relationship. You cannot remove related business terms when you edit the term which is the derived asset in the bi-directional relationship.

### **Parent**

Terms that have a parent relationship to the current business term. The current business term is a child of the parent business term. The parent business term appears as a link to open the term. This is a bi-directional relationship.

For example, if the current business term is "fixed mortgage," the parent business term might be "mortgage."

### **Children**

Terms that have a child relationship to the current business term. The child relationship indicates that the child terms have properties that are similar to, or inherited from the parent term. The terms appear as a link to open the term. This property is read-only. This is a bi-directional relationship.

### **Contains**

Other business terms that are used in the implementation of the current business term. The terms appear as a link to open the term. This is a bi-directional relationship. The derived relationship is "Contained By."

For example, the current business term "purchase order" can contain another business term "order date."

### **Calculated From**

Business terms from which you can calculate the value of the current business term. This is a bi-directional relationship. The derived relationship is "Used for Calculating."

For example, the value of the term "gross profit" is calculated from the value of the business term "revenue."

### **Rules**

Policies or rules that govern the business term. A business term can have both rules and policies. Policies have to go through an approval cycle before they are published. Rules are created when defining the business term. Policies and rules appear as a link.

A business term displays the following properties for a rule:

- Name. The name of the rule.
- Rule Intent. The purpose of the rule.
- Policy. Indicates the linked policy which governs the term. The policies appear as a link to open the policy. For example, if the current business term is "Social Security number," the linked policy might be "privacy policy." The "Governs" and "Governed By" relationship is used between a policy and a business term.
- Asset. The number of linked rule assets. The linked rule assets are displayed in the **Related Assets** section.

For example, you can apply a rule to "mortgage" that defines that the information is complete when it contains values for interest rate, name of the lender, name of the borrower, and address of the property. You can also link a policy that mandates the mortgage information must be complete before the

mortgage information is published to customers. The rule and policy tell the glossary consumer about the parameters that define conformance to the policy.

#### **Source**

The origin of the information contained within the business term.

A business term can originate from one of the following sources:

- Internal. Indicates that someone within the organization developed the business term.
- External. Indicates that someone within the organization used an external source to develop the business term.

## Status Properties

The **Status** section contains properties about the current status and phase of the business term. The status indicates the validity of the term. The phase corresponds to the type of tasks the content managers perform. The current status and phase is applicable for the current revision of the business term.

Business terms contain the following properties in the **Status** section:

#### **Status**

The current status of the business term.

A term can have one of the following statuses:

- Active. Indicates that the business term is valid for the organization. All Business Glossary users can see the term.
- Inactive. Indicates that the business term is not valid for the organization or not ready for the glossary consumers to view.

#### **Phase**

The current phase of the business term. The value of this property changes when the data steward defines, proposes, or publishes the business term.

A term can exist in one of the following phases:

- Draft. Indicates that the data steward created the business term.
- In Review. Indicates that the data steward proposed a review by the stakeholder.
- Rejected. Indicates that the stakeholder reviewed and rejected the business term.
- Published. Indicates that the data steward published the business term.
- Pending Publish. Indicates that the business term is part of a business initiative which is not yet published.

Glossary consumers can see published business terms.

## People Properties

The **People** section contains business term properties to identify content managers for the term.

Business terms contain the following properties in the **People** section:

#### **Owner**

The business term owner.

### Data Steward

The user who manages the business term content.

### Stakeholders

One or more users who participate in the approval process before the data steward publishes the business term.

## Context Properties

The **Context** section contains properties that provide background information about the term, such as description, usage context, and example.

Business terms contain the following properties in the **Context** section:

### Description

Description of the business term.

### Usage Context

Information that describes the context of the business term usage.

For example, the business term "risk management" is described differently based on the context.

The following table describes the context for the business term "risk management":

Usage Context	Description
Legal	The use of insurance to minimize exposure to liability in the event of a loss or injury.
Finance	Quantifying the potential for losses in an investment and taking appropriate actions based on investment objectives and tolerance to risk.

### Example

An example that shows the usage of the business term.

### Reference Table URL

A link to the reference table that contains the valid values that are associated with the business term.

For example, if the current business term is "mortgage," the URL can contain a link to a reference table that provides fixed mortgage rates.

## Related Assets Properties

The **Related Assets** section contains properties to view related assets, such as related terms, catalog objects, profiles, data assets, and rule assets.

Business terms contain the following properties in the **Related Assets** section:

### Related terms

Terms that are related to the current business term using custom relationships. The terms appear as a link to open the term.

**Note:** You can remove the business terms that are related using custom relationships only when you edit a term which is the primary asset in the bidirectional relationship. You cannot remove the business terms that are related using custom relationships when you edit a term which is the derived asset in the bidirectional relationship.

### Data assets

A data asset is a type of data object that represents either a physical data source, data domain, or a Metadata manager catalog object.

Business terms can contain the following types of data asset links:

- Data domains. A predefined or user-defined Model repository object based on the semantics of column data or a column name.
- Data objects. Metadata sources from which you want to extract metadata to analyze.
- 

For example, sensitive data such as Social Security numbers are stored in a data domain. The data asset for the business term "sensitive data" contains a link to the data domain location. An auditor or governing body who reads the business term can see the location where sensitive data is stored.

### Rule assets

Rule assets are mapplet rules or rule definitions that contain transformations or business logic.

Business terms can contain the following types of rule asset links:

- Mapplet rule. A reusable object in repositories that contains a set of transformations.
- Rule definition. Business logic that defines conditions applied to data when you run a profile.

For example, the organization requires sensitive information such as Social Security number to be masked. A mapplet rule defines how a Social Security number is masked. The mapplet rule is linked as a rule asset to the business term "Social Security number." An auditor or governing body who reads the business term can also see the mapplet rule used to mask the data.

Data assets and rule assets are read-only and appear when you open a business term. Create a link to the business term from the data asset.

### Column profiles

A column profile determines the characteristics of columns in a data source, such as value frequency, percentages, and patterns.

### Metadata Manager catalog objects.

The catalog that contains information about metadata objects.

**Note:** When you purge or delete a business glossary resource from Metadata Manager warehouse, the Analyst tool removes the asset links to the Metadata Manager catalog objects.

## Attachment Properties

Attachments that the content managers add to the business term are available in the **Attachments** section.

Business terms contain the following properties in the **Attachments** section:

### Attachments

Attachments that the content managers add to the business term.

## Activity Properties

The **Activity** section contains properties to track activity.

The **Activity** section is visible when you open a business term.

Business terms contain the following properties in the **Activity** section:

**View History**

Displays the history of tasks such as import, publish, or revise performed on the current term.

**Comments**

Displays the comments for the current term.

## Policy Properties

A policy defines the business purpose, process, or protocol that governs business practices that are related to business terms.

Policies contain properties in the following sections:

**General**

Contains global properties, such as name, categories, and description.

**Status**

Contains properties about the current status and phase of the policy. The status indicates if the policy is in use and valid. The phase changes based on the tasks that the content managers perform.

**People**

Contains policy properties to identify content managers.

**Attachments**

Contains properties to attach documents, images, and other kind of files to the policy.

**Activity**

Contains properties to track activity, such as history and comments.

The **Activity** section is visible when you open a policy.

**Note:** You might see a different set of properties in the policy if the glossary administrator modified the policy template.

**RELATED TOPICS:**

- [“Creating an Asset” on page 37](#)
- [“Policies” on page 36](#)
- [“ Edit an Asset in the Glossary Workspace” on page 26](#)

## General Properties

The **General** section contains global policy properties, such as name categories, and description.

Policies contain the following properties in the **General** section:

**Name**

The policy name.

**Categories**

A descriptive classification of the policy.

For example, there is a policy that defines the "Privacy Act of 1974" and a policy that defines the "Electronic Communications Privacy Act." Classify the policies under a category called "data usage laws."

#### **Business Initiative**

A business initiative to which the policy belongs.

#### **Description**

The purpose of the policy.

For example, the purpose of the policy, "Privacy," is to protect the privacy of customer data.

#### **Rule Intent**

Information that explains how the organization implements the policy.

For example, the rule intent for the privacy policy can have rules to mask customer data. The rules to mask customer data are to implement the privacy policy.

#### **Governs**

A read-only property that lists one or more business terms that the policy applies to.

For example, the confidentiality policy applies to terms such as salary and annual appraisal.

## Status Properties

The **Status** section contains properties about the current status and phase of the policy. The policy is visible to glossary consumers based on the status that you set. The phase corresponds to the tasks the content managers perform. The current status and phase is applicable for the current revision of the policy.

Policies contain the following properties in the **Status** section:

#### **Status**

The current status of the policy.

A policy can have one of the following statuses:

- **Active.** Indicates that the policy is valid for the organization. All Business Glossary users can see the policy.
- **Inactive.** Indicates that the policy is not valid for the organization or not ready for use.

#### **Phase**

The current phase of the policy. The value of this property changes when the data steward defines, proposes, rejects, or publishes the policy.

A policy can exist in one of the following phases:

- **Draft.** Indicates that the data steward created the policy.
- **In Review.** Indicates that the data steward proposed a review by the stakeholder.
- **Rejected.** Indicates that the stakeholder reviewed and rejected the policy.
- **Published.** Indicates that the data steward published the policy.
- **Pending Publish.** Indicates that the policy is part of a business initiative which is not yet published.

Glossary consumers can see published policies.



## People Properties

The **People** section contains policy properties to identify content managers.

Policies contain the following properties in the **People** section:

### **Owner**

The policy owner.

### **Data Steward**

The user who manages the policy.

### **Stakeholders**

One or more users who participate in the approval process before the data steward publishes the policy.

## Attachment Properties

Attachments that the content managers add to the policy are available in the **Attachments** section.

Policies contain the following properties in the **Attachments** section:

### **Attachments**

Attachments that the content managers add to the policy.

## Activity Properties

The **Activity** section contains properties to track activity.

The **Activity** section is visible when you open a policy.

Policies contain the following properties in the **Activity** section:

### **View History**

Displays the history of tasks such as import, publish, or revise performed on the current policy.

### **Comments**

Displays the comments for the current policy.

## Category Properties

A category is a descriptive classification of business terms and policies.

You can configure the following properties to define a category:

### **Name**

Category name.

### **Description**

Description of the category.

### **Location**

The glossary that contains the category.

**Business Initiative**

A business initiative to which the category belongs.

**Status**

The current status of the category. The current status is applicable for the current revision of the category.

A category can have one of the following statuses:

- Active. Indicates that the category is valid for the organization. All Business Glossary users can see the category.
- Inactive. Indicates that the category is not valid for the organization or not ready for use.

**Phase**

The current phase of the category. The current phase is applicable for the current revision of the category. The value of this property changes when the data steward defines, proposes, rejects, or publishes the category.

A category can exist in one of the following phases:

- Draft. Indicates that the data steward created the category.
- In Review. Indicates that the data steward proposed a review by the stakeholder.
- Rejected. Indicates that the stakeholder reviewed and rejected the category.
- Published. Indicates that the data steward published the category.
- Pending Publish. Indicates that the category is part of a business initiative which is not yet published.

Glossary consumers can see published categories.

**Data Steward**

The user who manages the category.

**Owner**

The category owner.

**Stakeholders**

One or more users who participate in the approval process before the data steward publishes the category.

**Attachments**

Contains properties to attach documents, images, and other kind of files to the category.

**RELATED TOPICS:**

- [“Creating an Asset” on page 37](#)
- [“Categories” on page 36](#)
- [“ Edit an Asset in the Glossary Workspace” on page 26](#)

## Attachments Properties

Attachments that the content managers add to the category are available in the **Attachments** section.

Categories contain the following properties in the **Attachments** section:

**Attachments**

Attachments that the content managers added to the category.

## Activity Properties

The **Activity** section contains properties to track activity.

The **Activity** section is visible when you open a category.

Categories contain the following properties in the **Activity** section:

### **View History**

Displays the history of tasks such as import, publish, or revise performed on the current category.

### **Comments**

Displays the comments for the current category.

## Business Initiative Properties

A business initiative holds other Glossary assets. You can publish a business initiative to publish the assets that are part of the initiative.

Business initiatives contain properties in the following sections:

### **General**

Contains global properties, such as name and description.

### **Status**

Contains properties about the open date, close date, current status, and phase of the business initiative. The status indicates the validity of the business initiative. The phase changes based on the task that the content managers perform.

### **Asset Collection**

Contains a list of assets that are part of the initiative.

### **People**

Contains properties to identify content managers for the initiative.

### **Attachments**

Contains properties to attach documents, images, and other kind of files to the business initiative.

### **Activity**

Contains properties to track activity, such as history and comments.

### RELATED TOPICS:

- [“Edit an Asset in the Glossary Workspace” on page 26](#)
- [“Business Initiatives” on page 42](#)

## General Properties

The **General** section contains the name and description properties.

Business initiatives contain the following properties in the **General** section:

### **Name**

Business initiative name.

### **Description**

Description of the business initiative.

## Status Properties

The **Status** section contains properties about the open date, close date, current status, and phase of the business initiative. The status indicates the validity of the business initiative. The phase changes based on the tasks that the content managers perform.

Business initiatives contain the following properties in the **Status** section:

### **Open Date**

The date when the business initiative starts.

### **Close Date**

The date when the business initiative ends.

### **Status**

The current status of the business initiative.

A business initiative can have one of the following statuses:

- **Active.** Indicates that the business initiative is valid for the organization.
- **Inactive.** Indicates that the business initiative is not valid for the organization or not ready for the glossary consumers to view.

### **Phase**

The current phase of the business initiative. The value of this property changes when the data steward defines, proposes, or publishes the business initiative.

A business initiative can exist in one of the following phases:

- **Draft.** Indicates that the data steward created the business initiative.
- **In Review.** Indicates that the data steward proposed a review by the stakeholder.
- **Rejected.** Indicates that the stakeholder reviewed and rejected the business initiative.
- **Published.** Indicates that the data steward published the business initiative.

Glossary consumers can see published business initiatives.

## Asset Collection Properties

The **Asset Collection** section contains Glossary assets that are part of the business initiative.

A business initiative contains the following property in the **Asset Collection** section:

### **Assets**

Business terms, categories, or policies that are part of the business initiative.

## People Properties

The **People** section contains business initiative properties to identify content managers for the initiative.

Business initiatives contain the following properties in the **People** section:

**Owner**

The business initiative owner.

**Data Steward**

The user who manages the business initiative content.

**Stakeholders**

One or more users who participate in the approval process before the data steward publishes the business initiative.

## Attachment Properties

Attachments that the content managers add to the business initiative are available in the **Attachments** section.

Business initiatives contain the following properties in the **Attachments** section:

**Attachments**

Attachments that the content managers add to the business initiative.

## Activity Properties

The **Activity** section contains properties to track activity.

The **Activity** section is visible when you open a business initiative.

Business initiatives contain the following properties in the **Activity** section:

**View History**

Displays the history of tasks such as import, publish, or revise performed on the current initiative.

**Comments**

Displays the comments for the current initiative.

## Glossary Properties

A glossary is a collection of categories, business terms, and policies.

Glossaries contain properties in the following sections:

**General**

Contains global properties, such as name and description.

**People**

Contains business term properties to identify content managers for the glossary.

### RELATED TOPICS:

- [“Creating a Glossary” on page 67](#)
- [“Edit an Asset in the Glossary Workspace” on page 26](#)

## General Properties

The **General** section contains global properties, such as name and description.

Glossaries contain the following properties in the **General** section:

**Name**

Glossary name.

**Description**

Description of the glossary.

## People Properties

The **People** section contains business term properties to identify content managers for the glossary.

Glossaries contain the following properties in the **People** section:

**Owner**

The user who is the owner of the glossary.

**Steward**

The user who manages the glossary.

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