erwin Data Intelligence Suite

Business Glossary Management Guide

Release v10.1

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Contents

Managing Business Glossary

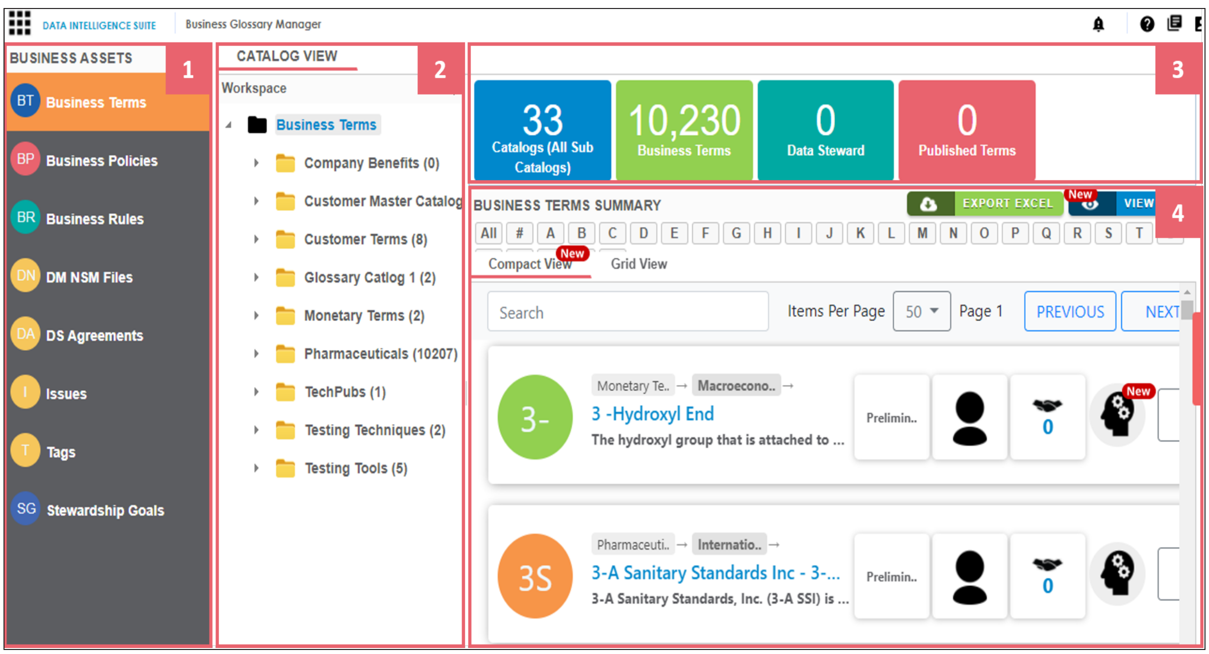
This section walks you through business glossary management.

Business Glossary is managed via Business Glossary Manager. It involves creating, managing, and collaborating on common business vocabulary across the organization. Business Glossary Manager supports regulatory compliance, data governance, and data stewardship. It facilitates lineage maps by showing how semantic definitions are related to physical data dictionaries, data mappings, and data lineages.

For further information on accessing and using the Business Glossary Manager, refer to the Using Business Glossary Manager topic.

Using Business Glossary Manager

To access the Business Glossary Manager, go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**. The Business Glossary Manager dashboard appears:



UI Section	Function
1-Browser	Use this pane to browse through business asset types. The asset types available

Pane	here depend on your Business Glossary Manager settings. You can also create custom asset types. For more information on creating asset types, refer to the Configuring Asset Types topic.
2-Glossary Workspace	Use this pane to browse through your workspace for the selected business asset type. It displays the available catalogs. Expand catalogs to view the existing business glossary assets.
3-Summary	Use this pane to view the summary of the objects under the selected business asset type. It displays the count of each component. Also, it lets you view business assets based on alphabets, set up views, and export business glossary summary in the XLSX format.
4-Details	Use this pane to view more information or work on the selected business asset. Based on the selection in Glossary Workspace, it displays a list of existing business glossary assets. You can use this pane in two view formats: ▪ **Compact View**: Displays important information, such as the asset name, description, status, and available operations in a compact card format ▪ **Grid View**: Displays all the information and available operations in a tabular format

Managing a business glossary involves the following:

- Creating business terms
  - Managing business terms
- Creating business policies
  - Managing business policies
- Creating business rules
  - Managing business rules

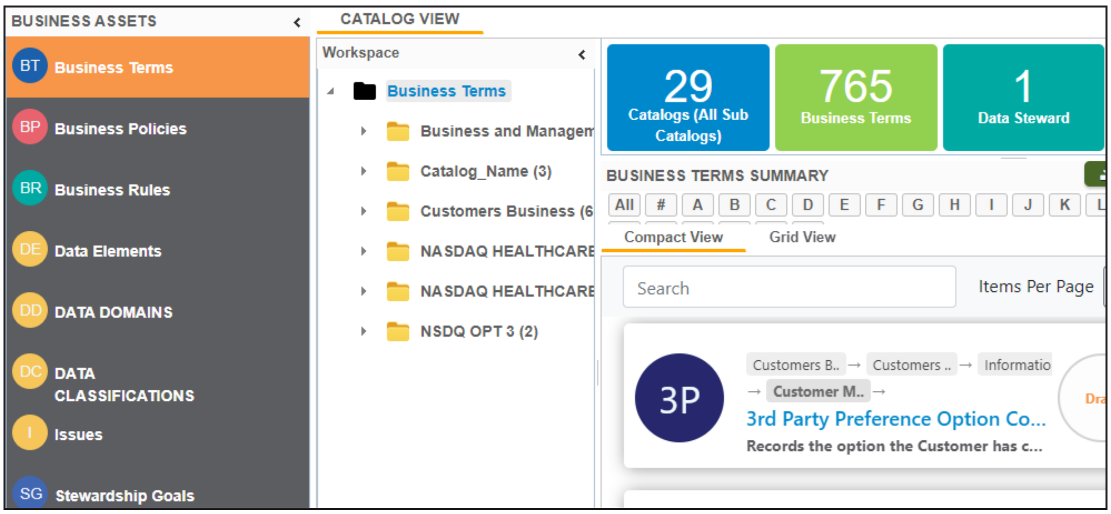
Once, you have created and set up these business glossary assets, you can assign data stewards and set up stewardship goals.

Creating Catalogs

Catalogs are the containers for all the asset types that are created in the Glossary Workspace. You can group business assets based on your organization's projects, departments, or functions. Therefore, before creating business assets, you need to create a catalog. You can also create sub-catalogs to group business assets further.

To create catalogs, follow these steps:

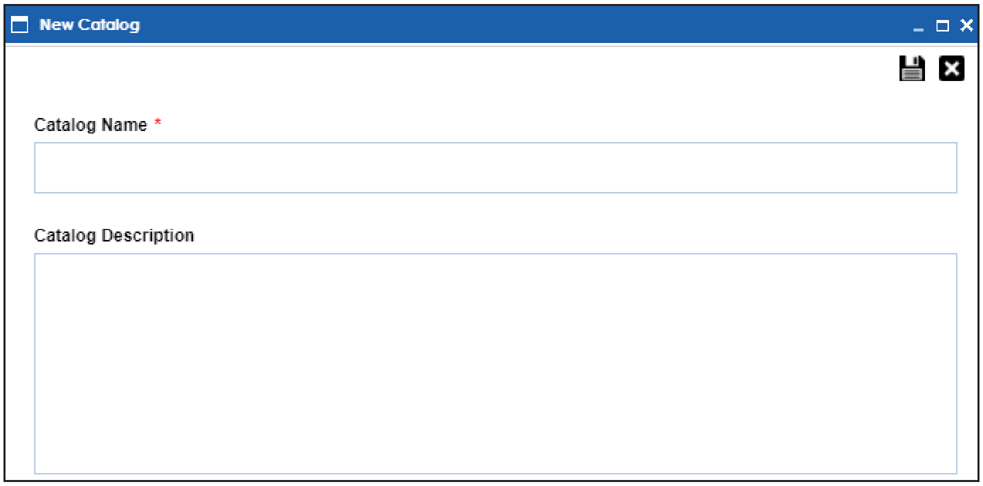
1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.
2. In the browser pane, click the type of business asset that you want to create. For example, Business Term. The Workspace switches to the business asset view.



3. In the Workspace pane, right-click the top-level business asset node.

4. Click **New Catalog**.

   The New Catalog page appears.



5. Enter **Catalog Name** and **Catalog Description**.

   For example:

   - **Catalog Name**: Business and Management
   - **Catalog Description**: The catalog contains business terms of the organization.

6. Click .

   A catalog is created and added to the catalog tree.

Once a catalog is created, you can manage it using the options available on right-clicking the catalog. Managing catalogs involves:

- Creating sub-catalogs
- Editing catalogs
- Importing or exporting catalogs
- Assigning users
- Viewing workflows

Managing Catalogs

Managing catalogs involves:

- Creating sub-catalogs
- Editing catalogs
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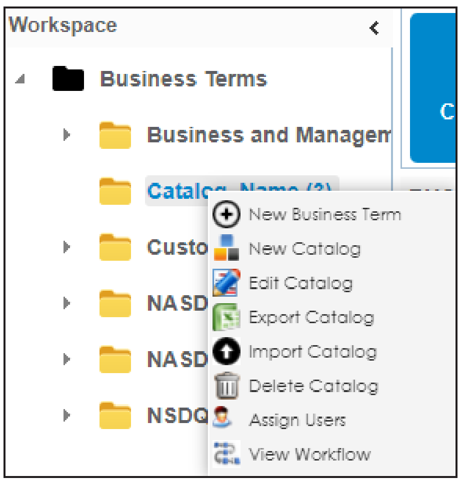
- Assigning users
- Viewing workflows

To manage catalogs, follow these steps:

1. Right-click a catalog.
   For example, right-clicking a business term catalog displays the corresponding options.
   

2. Use the following options:

New Catalog

Use this option to create sub-catalogs and group business assets further.

Edit Catalog

Use this option to update the catalog's name and description.

Import Catalog

Use this option to import existing catalogs. On the Import Business Catalog page, select the catalog file and click .

Export Catalog

Use this option to export a catalog to a XLSX file. You can later import this file to your glossary workspace.

Delete Catalog

Use this option to delete a catalog that is no longer required. All business assets in the catalog are deleted when you delete it.

Assign Users

Use this option to assign users to a catalog based on your organization's projects, departments, functions, and so on. On the Assign/Unassign Users page, select or remove users and click .

View Workflow

Use this option to view the workflow assigned to the catalog. The workflow displays all the stages, users, and roles involved. Also, it shows the flow of information and action across all the stages.

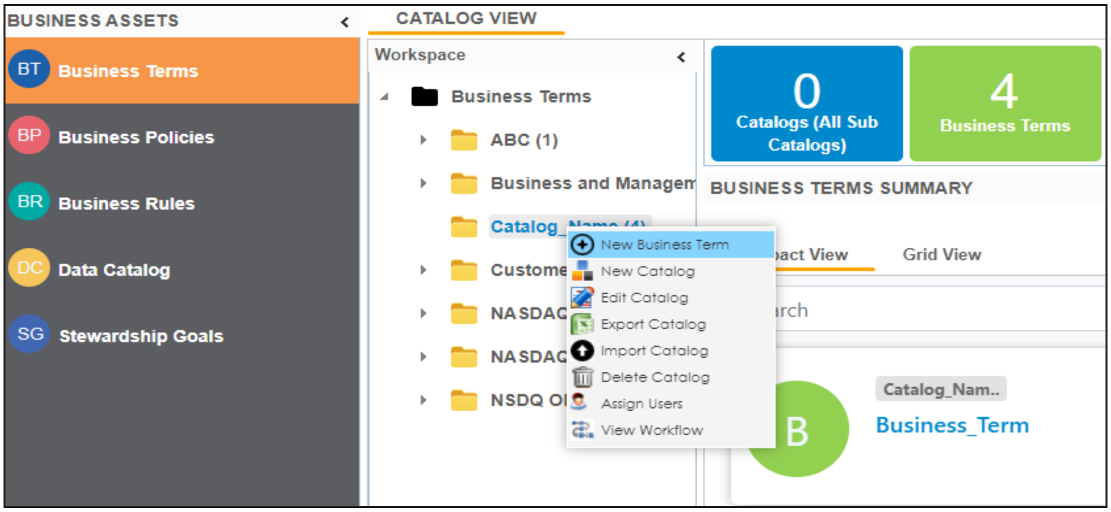
Creating Business Terms

Business terms are globally defined terms that represent your business terminology usage. Using business terms, you can maintain a common business vocabulary across your organization. You can create business terms in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

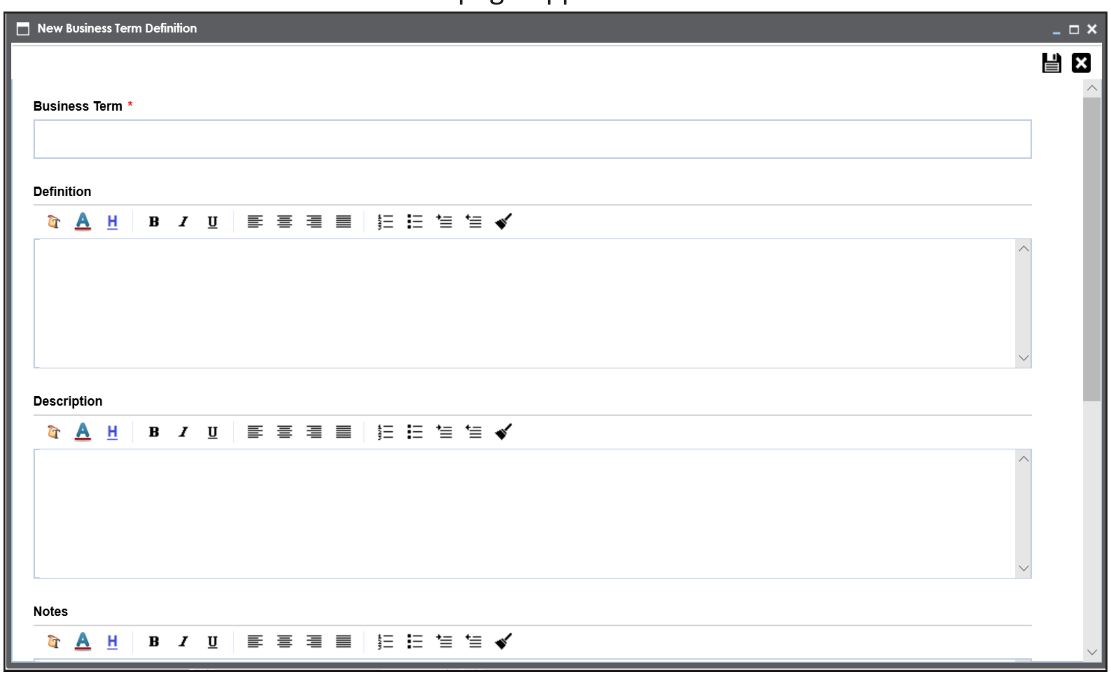
To create business terms, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.
2. In the browser pane, click **Business Terms**.
   The Workspace switches to the business terms view.

3. In the **Workspace** pane, under the **Business Terms** node, right-click a catalog node.



4. Click **New Business Term**.
   The New Business Term Definition page appears.



5. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.
   Refer to the following table for field descriptions.

Field Name	Description
Business Term	Specifies the name of the business term. For example, Account.
Definition	Specifies the definition of the business term. For example: An Account contains data for a party.
Description	Specifies the description about the business term. For example: Account contains data for posting, payments, debt recovery, and taxes.
Notes	Specifies the reference notes, if any. For example: The data for posting, payments, debt recovery, and taxes was imported from the Account.xlsx file.
Sensitive Data Indicator(SDI)	Specifies whether the business term is sensitive. Switch **Sensitive Data Indicator(SDI)** to **Yes** to mark the business term as sensitive.
Sensitive Data Indicator (SDI) Classification	Specifies the SDI classification of the business term. For example, PHI. This list is enabled when Sensitive Data Indicator (SDI) is switched to Yes. For more information on configuring SDI classifications, refer to the Configuring Sensitive Data Indicator Classifications topic.
Sensitive Data Indicator (SDI) Description	Specifies the description of the SDI classification. For example: Protected Health Information. It is enabled when Sensitive Data Indicator(SDI) is switched to Yes. The field autopopulates based on the SDI classification.
Business Term Image	Drag and drop a picture of business term or click to browse and upload a picture.
Acronym	Specifies whether the business term is an acronym.
Data Steward	Specifies the name of the data steward responsible for the business

Field Name	Description
	term. For example, Jane Doe. For more information on configuring list of data stewards, refer to the Configuring Data Stewards topic.

Note: By default, sensitivity fields (Sensitive Data Indicator(SDI), Sensitive Data Indicator (SDI) Classification, and Sensitive Data Indicator (SDI) Description) are enabled for business terms. For more information on enabling sensitivity fields, refer to the Configuring Asset Details topic.

6. Click .
   A business term is created and added to the catalog.
   Based on your workflow assignment settings, the business term may need further action for review or approval. For more information, refer to the Managing Business Glossary Workflows topic.

Once the business term is created, you can enrich it further by:

- Setting up associations
- Setting up additional details
- Adding rich media
- Setting up collaborations
- Viewing workflow logs
- Assigning valid values

You can manage a business term using the options available under the Options column on the Grid View tab. Managing business terms involves:

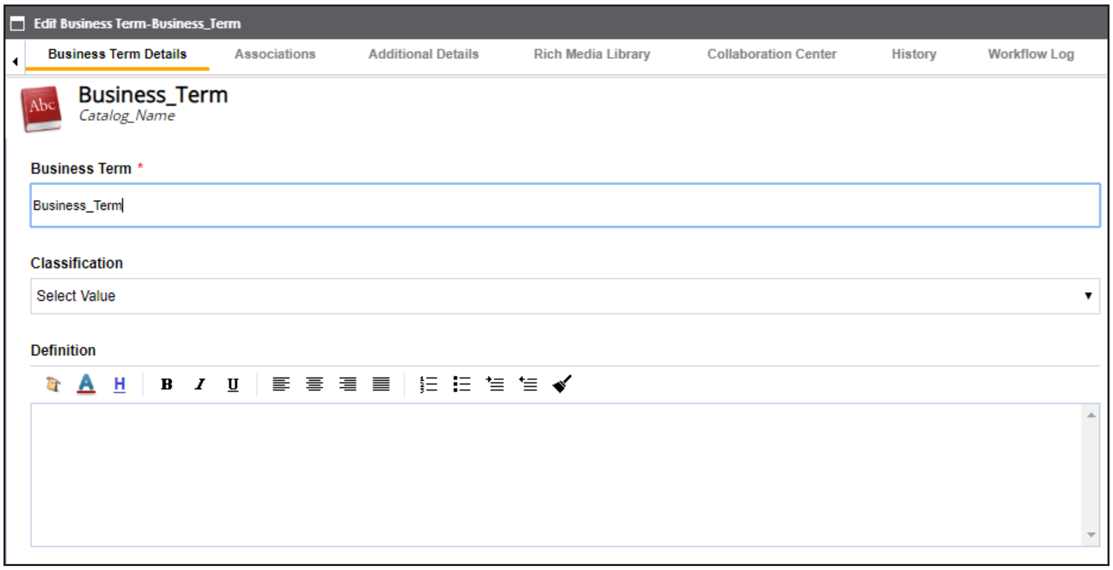
- Editing or deleting business terms
- Viewing mind maps
- Exporting business terms
- Viewing history

Setting Up Associations for Business Terms

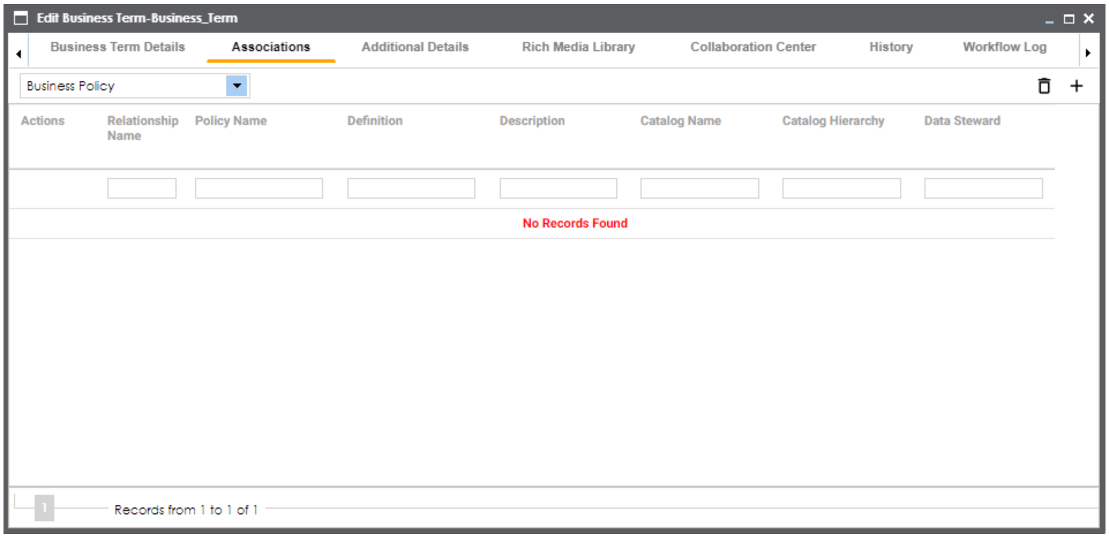
By default, you can associate business terms with business assets (business policies and other business terms) and technical assets (columns, environments, and tables). You can control the asset types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

To set up associations for business terms, follow these steps:

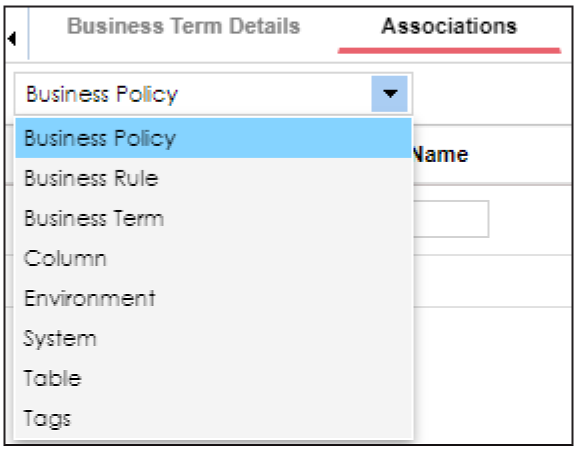
1. On the **Grid View** tab, under the **Options** column, click .
   The business term opens in edit mode.



2. Click the **Associations** tab.

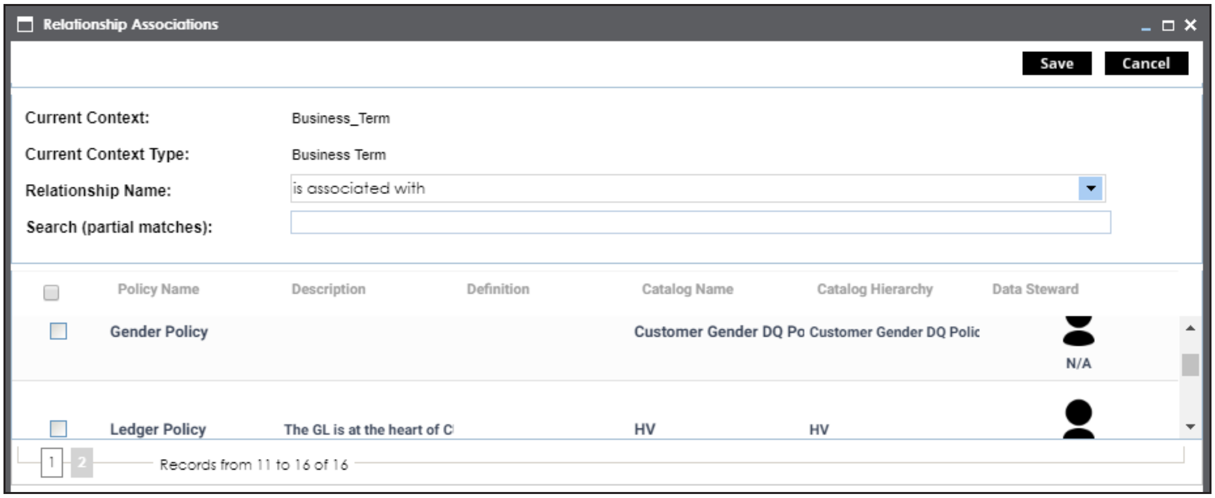


3. In the asset type (business policies, business terms, columns, environments, and tables) list, select an asset type to associate with the business term.



4. Click **+**.

The Relationship Associations page appears. Based on the asset type that you select, it displays a list of available assets.



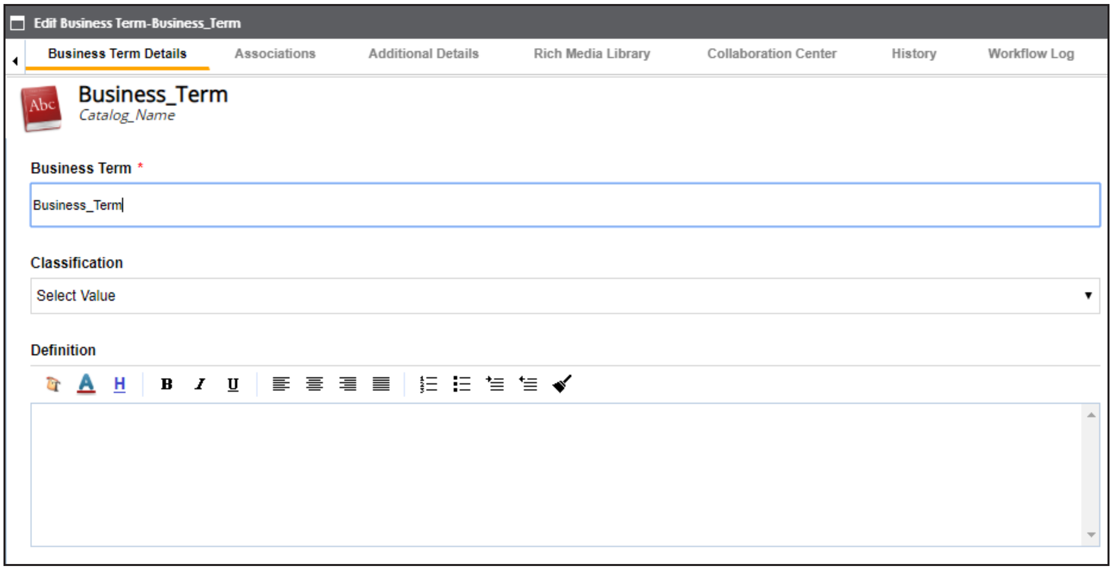
5. From the list, select assets to associate with your business term.
   If you know the asset name, use the Search (partial matches) field to look up for it.
6. Click **Save**.
   The selected assets are associated with the business term and added to the list of associations.
   You can define as many associations as required.

Setting Up Additional Details

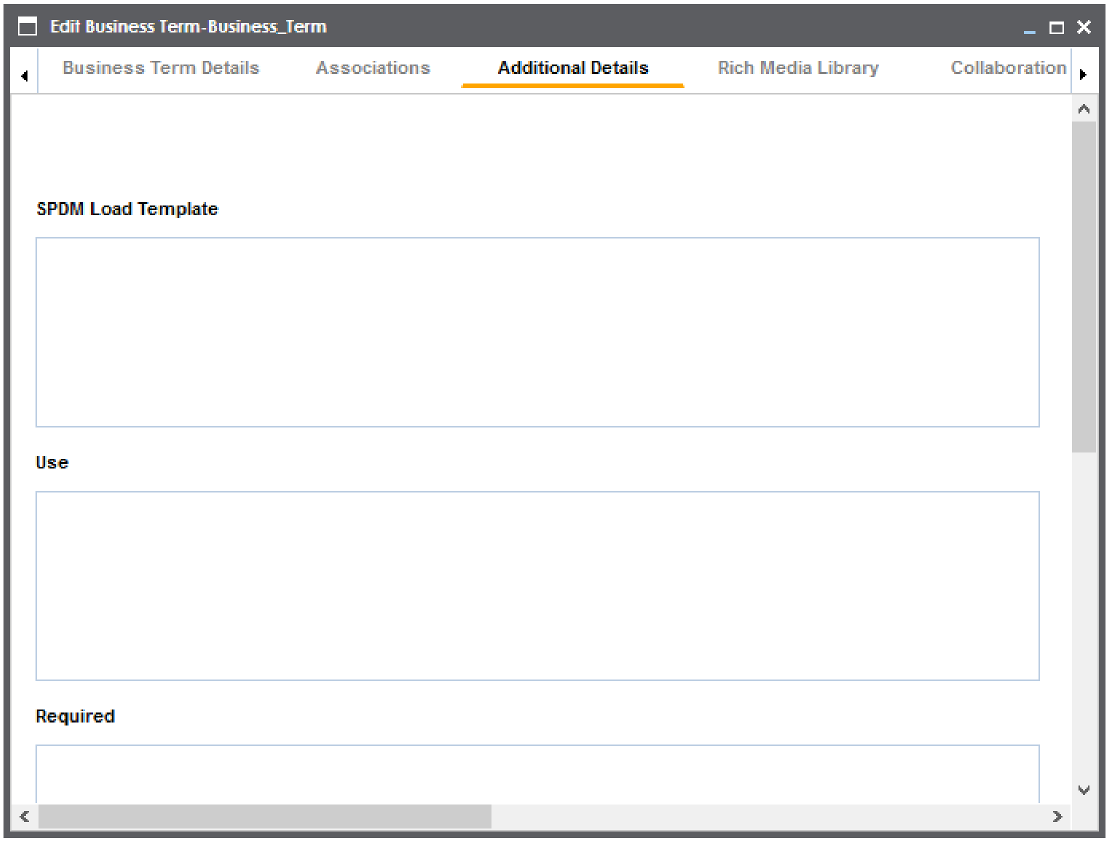
You can set up custom additional information about a business term to add more context.

To set up additional information, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business term opens in edit mode.



2. Click the **Additional Details** tab and click .



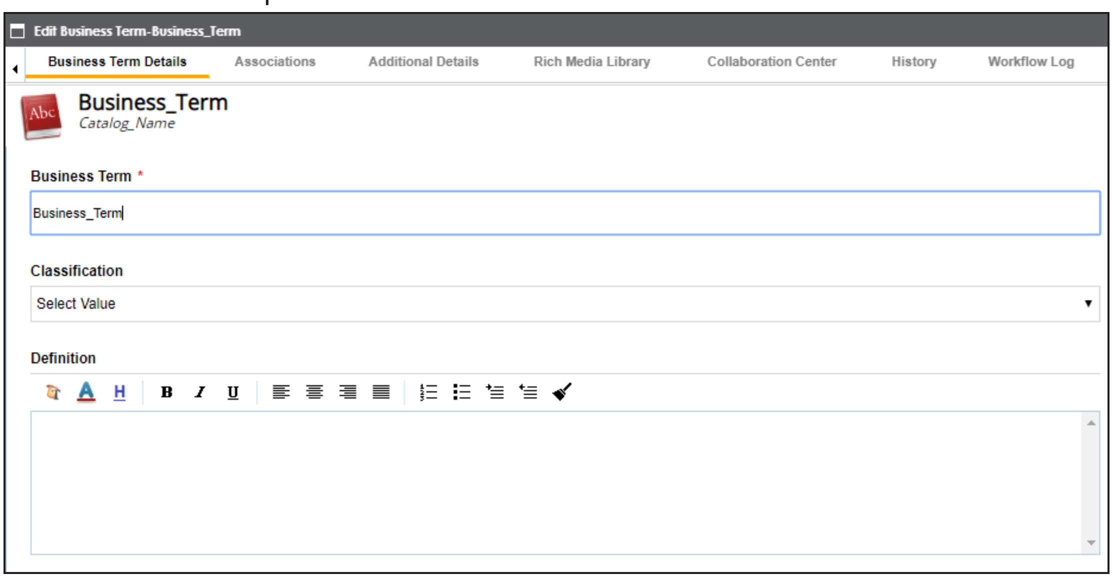
3. Add information to the available user-defined fields.
   By default, these fields have generic labels. For example, User Defined 1. For more information on configuring the UI labels of these fields, refer to the Configuring Language Settings topic.
4. Click .
   The information you entered is added to the business term.

Adding Rich Media

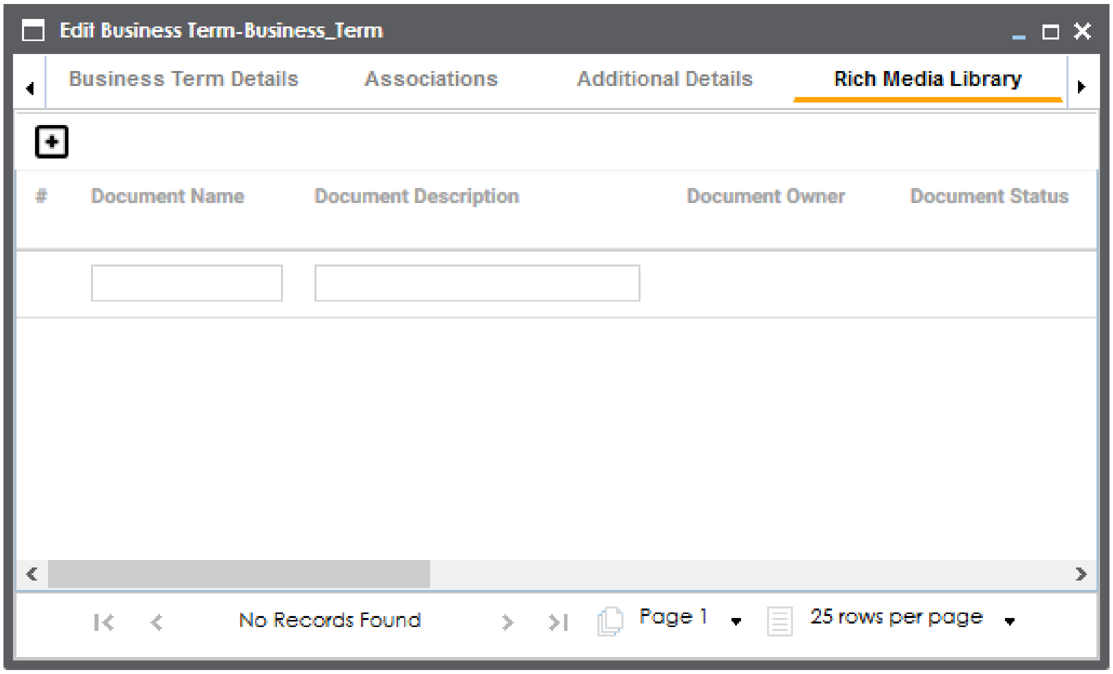
You can add supporting artifacts, such as text files, audio files, video files, and so on to a business term.

To add rich media to a business terms, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business term opens in edit mode.

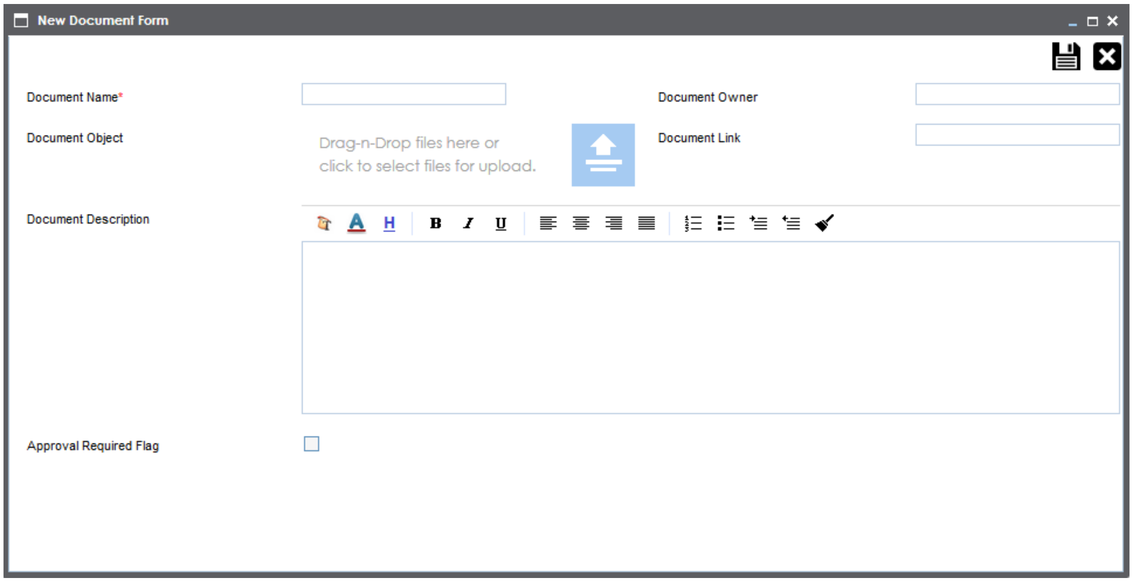


2. Click the **Rich Media Library** tab.



3. Click .

The New Document Form page appears.



4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
System Document Name	Specifies the name of the document being attached to the business term. For example, Business Term Details.
System Document Object	Drag and drop document files or use to select and upload document files.
System Document Owner	Specifies the document owner's name. For example, John Doe.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Intended Use Description	Specifies the intended use of the document. For example: The document is to keep a record of system description and its data dictionary.
Approval Required Flag	Specifies whether the document requires approval. Select the **Approval Required Flag** check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

5. Click .
   The selected rich media file and its description are added to the business term.

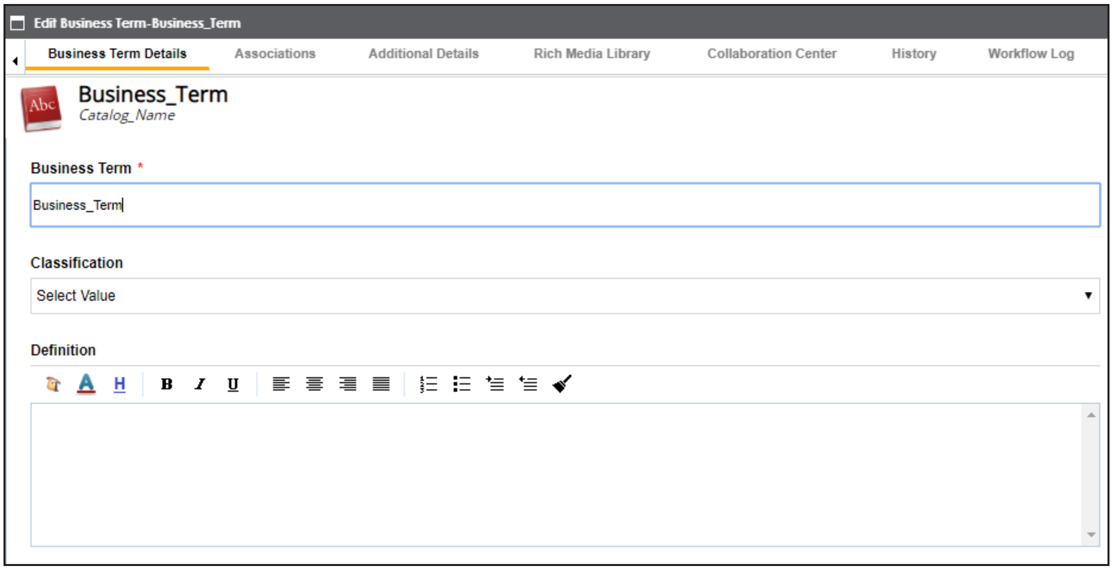
Setting Up Collaborations

You can start discussions on business assets or a relevant topic with your team using the Collaboration Center. This enables you and your team to work together.

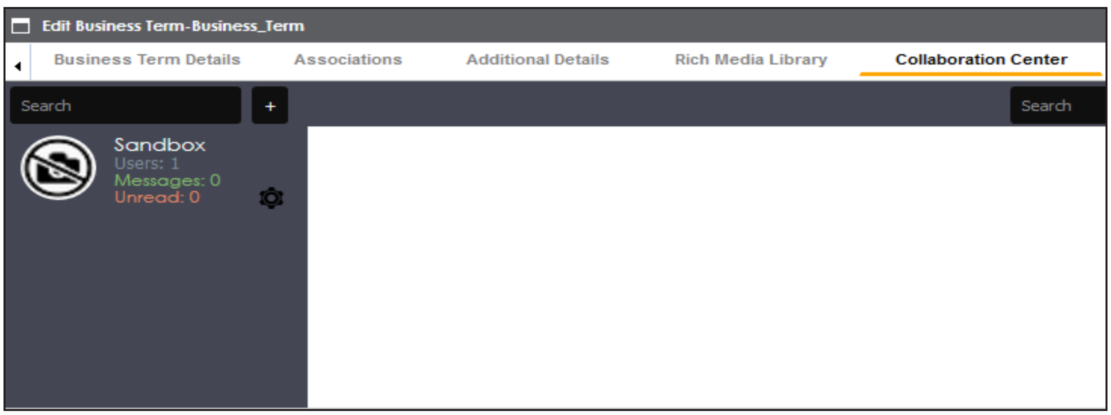
To set up collaborations, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .

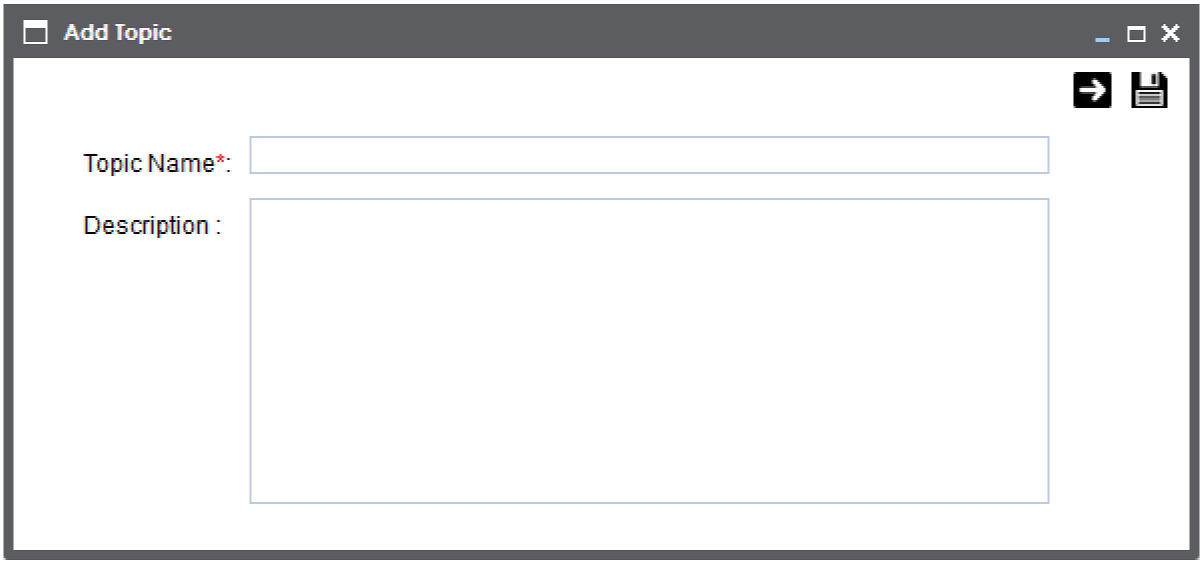
   The business term opens in edit mode.



2. Click the **Collaboration Center** tab.



3. Click .
   The Add Topic page appears.



4. Enter **Topic Name** and **Description**.
5. Click .
   The User Assignment page appears.
6. Select the users or your team members that you want to collaborate with.
7. Click .
   The topic is saved and added to the list of topics in the Collaboration Center. The topic is also added to the Collaboration Center of the users that you selected earlier.

You can manage a topic using the options available under Topic Options (). Managing a topic involves:

- Viewing, editing, or deleting a topic
- Assigning users
- Managing notifications
- Saving topic conversations
- Sharing a topic

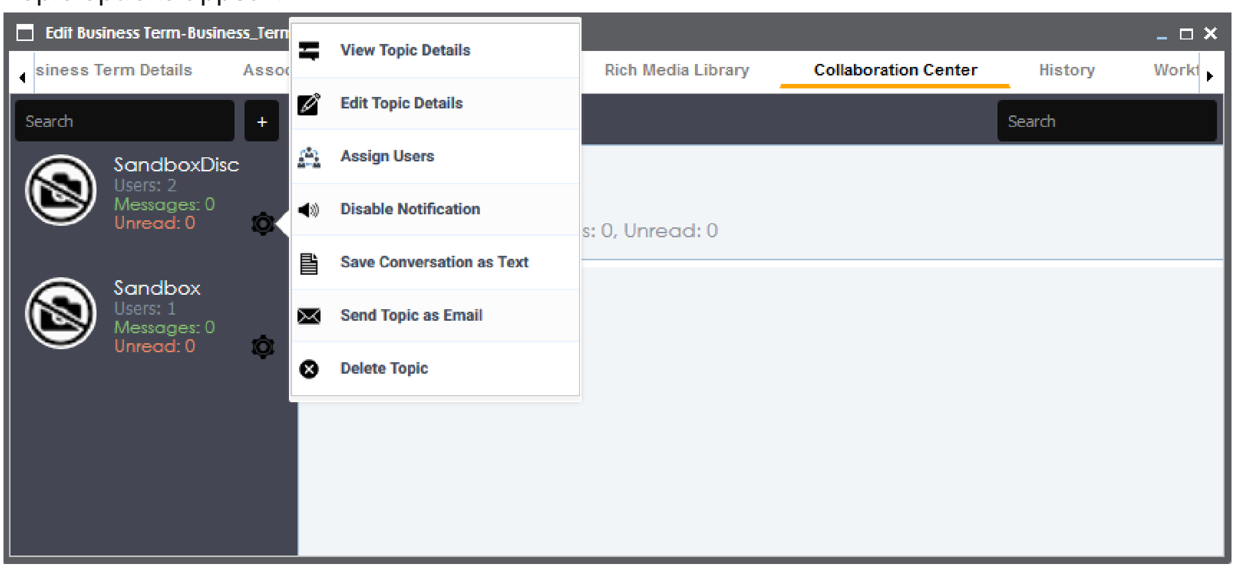
Managing Topics

Managing topics involves:

- Viewing, editing, or deleting a topic
- Assigning users
- Managing notifications
- Saving topic conversations
- Sharing a topic

To manage topics, follow these steps:

1. Click the **Collaboration Center** tab.
2. In the list of topics, on the topic you want to manage, click .
   Topic options appear.



3. Use the following options:

   View Topic Details

   Use this option to look at the topic and its information, such as the creator, the creation date and time, and the modification date and time.

Edit Topic Details

Use this option to edit the topic name and description to enrich it further.

Assign Users

Use this option to assign multiple users to collaborate with you and contribute to the topic.

Disable Notification

Use this option to choose whether you are notified whenever the topic is updated.

Save Conversation as Text

Use this option to save topic conversations to a text file. This option downloads a text file with the conversation, authors, and time stamp.

Send Topic as Email

Use this option to send the topic and its conversations in an email. Clicking **Send Topic as Email** opens an email recipient list, where you can select one or multiple recipients. Click  to send an email to the selected recipients.

Delete Topic

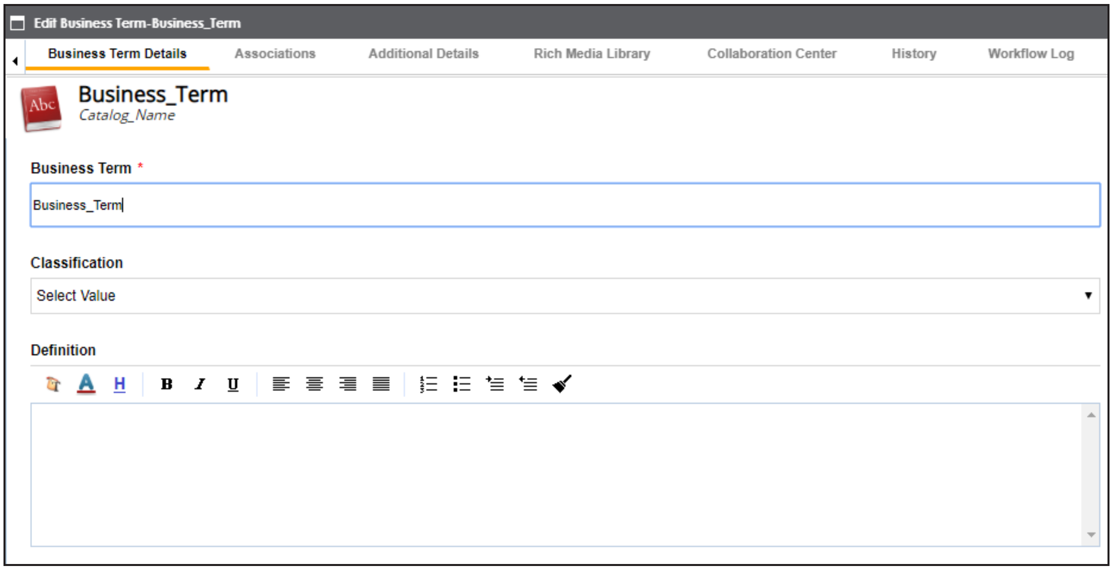
Use this option to delete a topic that is no longer required.

Viewing Workflow Logs

You can view the flow of actions of the workflow assigned to a business term. Along with other information, the workflow log displays the current state of the business term in the workflow.

To view workflow log, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business term opens in edit mode.



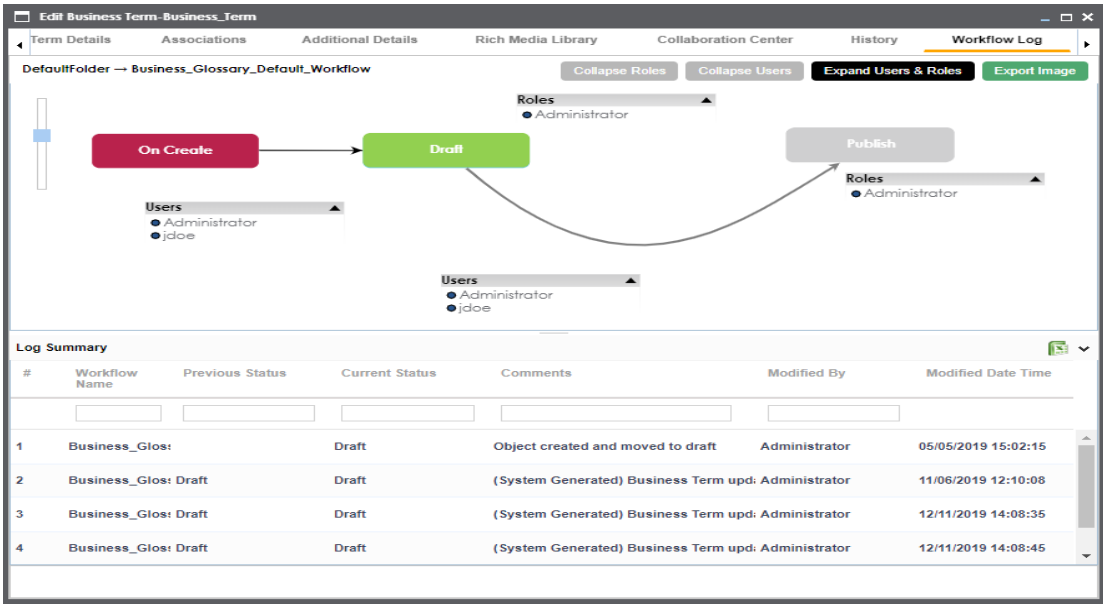
2. Click the **Workflow Log** tab.
   By default, it displays only the stages of the workflow and highlights the current stage. Use the following options to view more information:

   Expand Users & Roles

   Use this option to display users and roles associated with each workflow stage. You can choose to hide users or roles using the Collapse Users and Collapse Roles options.

   Log Summary

   Use this pane to view the log of the actions performed.



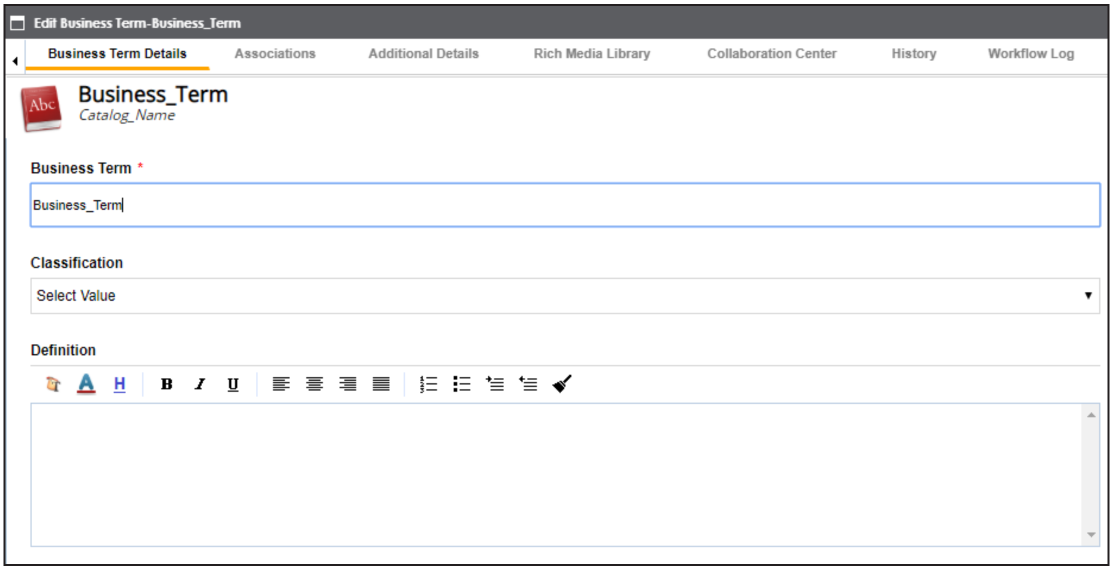
You can export the workflow log summary in XLSX format. Click to export the summary.

Assigning Valid Values

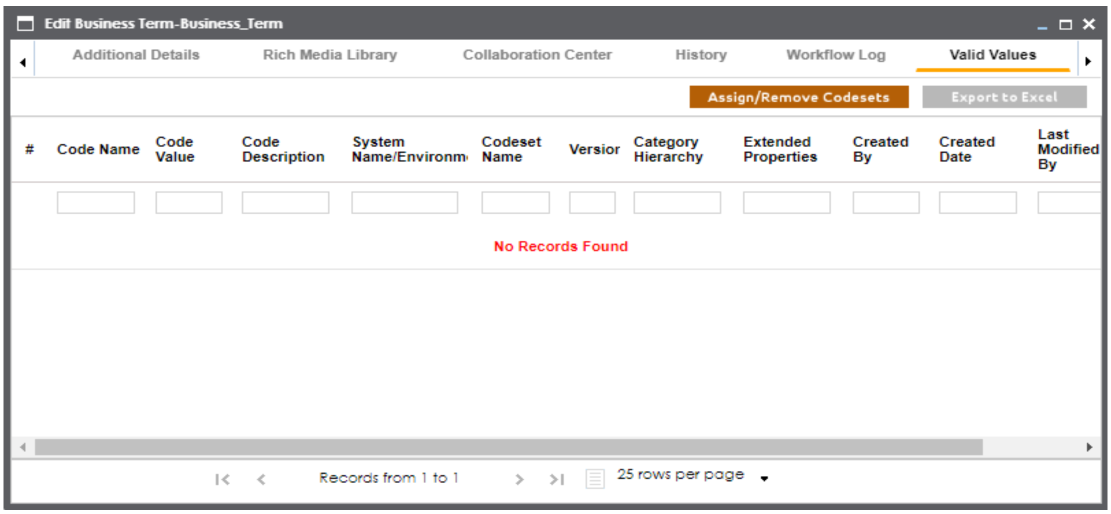
You can associate valid values (published codesets) to a business term. This enables you to maintain standard codes for business terms across the organization.

To assign valid values, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business term opens in edit mode.

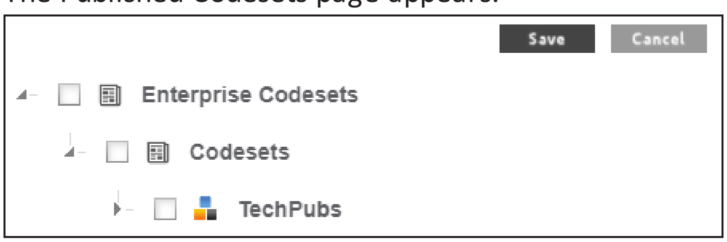


2. Click the **Valid Values** tab.



3. Click **Assign/Remove Codesets**.

The Published Codesets page appears.



4. Select codesets.
5. Click **Save**.
   The selected codesets are associated with the business term and are added to the Valid Values list.

To export the valid values list, click **Export to Excel**.

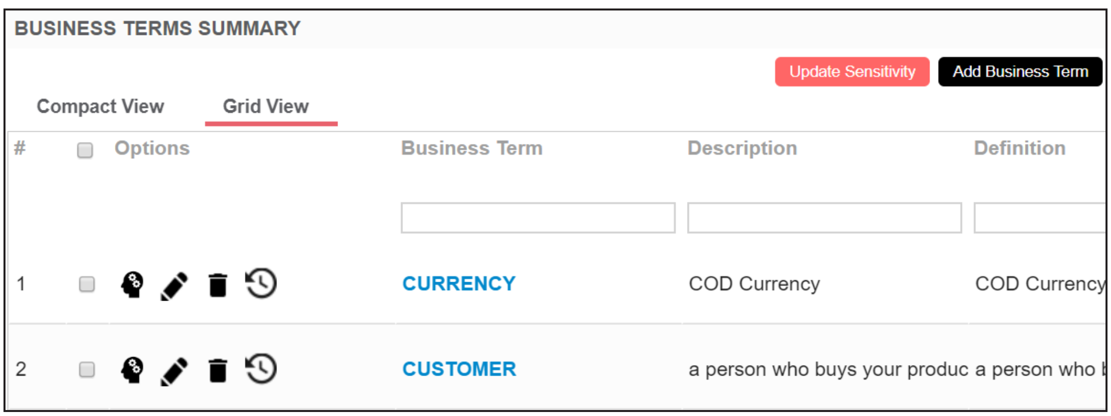
Managing Business Terms

Managing business terms involves:

- Editing or deleting business terms
- Viewing mind maps
- Viewing history

To manage business terms, follow these steps:

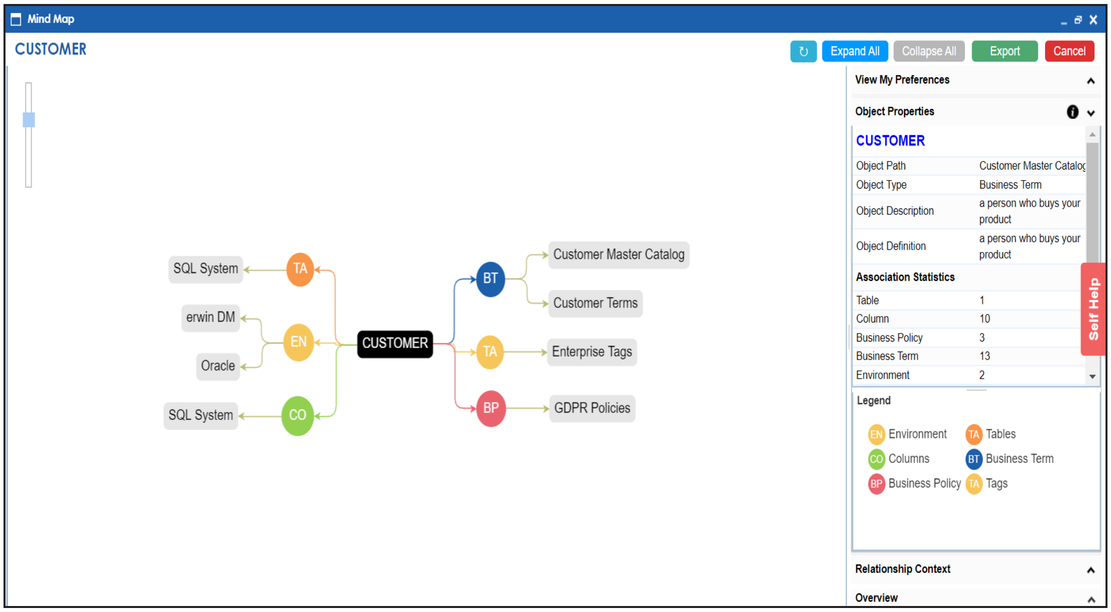
1. Click the **Grid View** tab.



2. Use the following options available under the Options column:

View Mind Map ( )

Use this option to view a business term's mind map. A mind map displays the pictorial representation of the business term, its associations, relationships, sensitivity, and so on.



Use the following options to work on the mind map:

Expand (+) : By default, a mind map is displayed up to the first level. To drill it down further, hover on a node and click the plus (+) icon or right-click a node and the click **Expand Asset Level**.

Export: To save the mind map to XLSX format or as an image, use **Export**.

Object Properties: To view the properties of an object in the mind map, select the object in the diagram. The Object Properties section displays the properties of the selected object.

For more information on mind maps, refer to the Viewing Mind Maps topic.

Edit Business Term ( )

Use this option to enrich a business term by defining associations, attaching rich media, and so on.

Delete Business Term ( )

Use this option to delete a business term that is no longer required.

View History ( )

Use this option to view all the actions performed on a business term since it was created. Alternatively, on the Edit Business Term page, click the **History** tab.

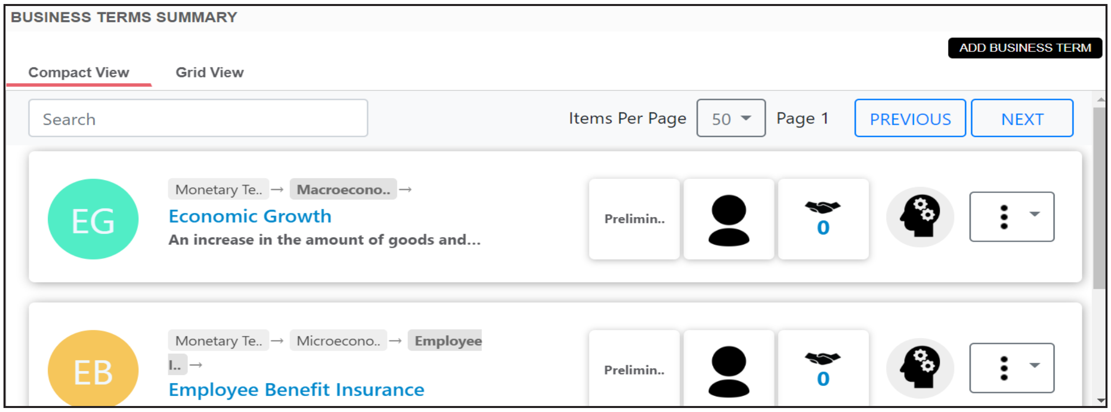
Moving Business Terms

You can move business terms from one catalog to another. You can also preserve catalog hierarchy while moving business terms.

To move business terms, follow these steps:

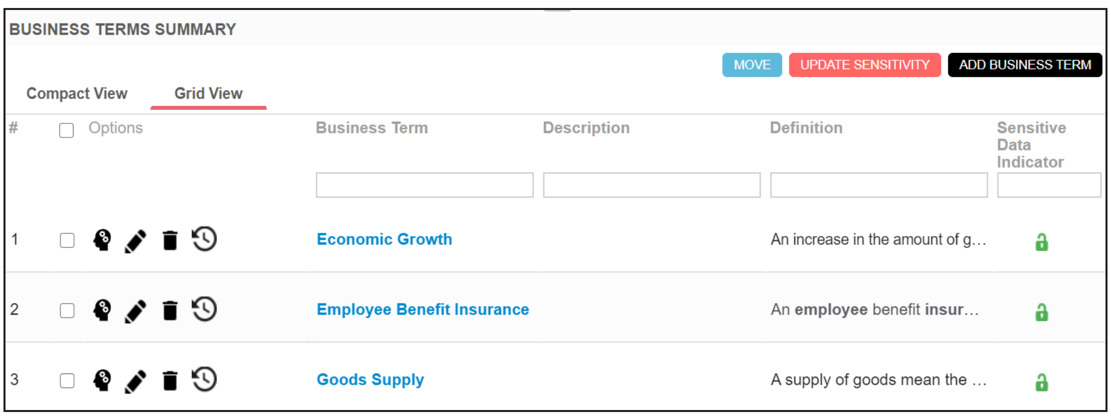
1. In the **Workspace** pane, under the **Business Terms** node, click the required catalog.

   By default, the Compact View tab appears.



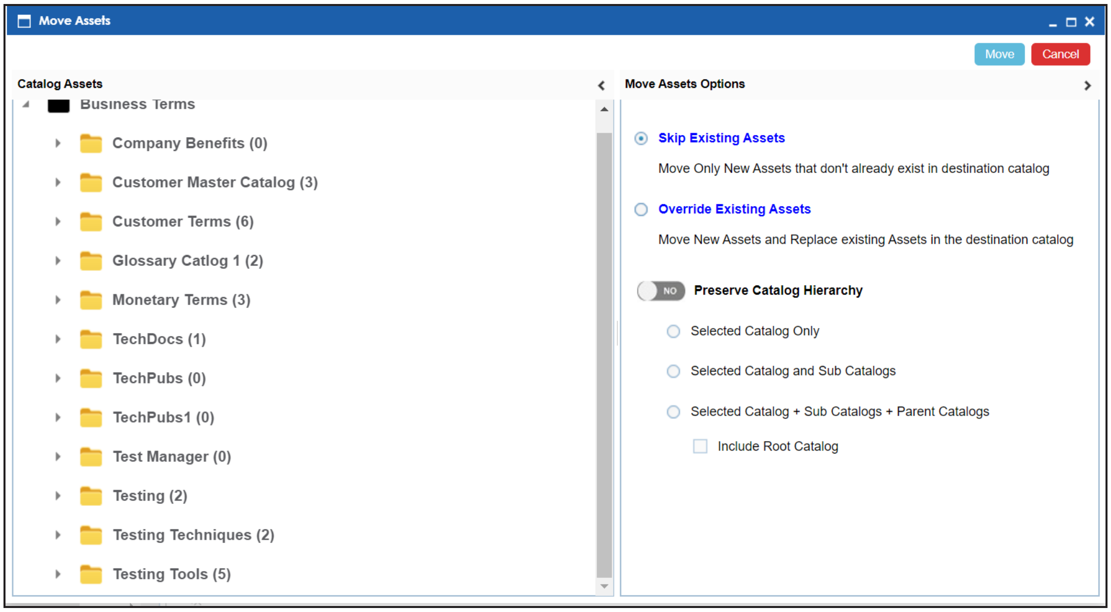
2. Click the **Grid View** tab.

   The list of business terms in the catalog appears.



3. Select the required rows or use the check box at top to select all the rows.
4. Click **Move**.

The Move Assets page appears.



5. In the **Catalog Assets** pane, select a destination catalog.
6. In the **Move Assets Options** pane, use the following options:

Skip Existing Assets

Use this option to skip existing assets and move new business terms in the destination catalog.

Override Existing Assets

Use this option to replace any existing business terms in the destination catalog.

Preserve Catalog Hierarchy

Switch **Preserve Catalog Hierarchy** to **Yes** to enable options for preserving catalog hierarchy.

- **Selected Catalog only**: Use this option to move only the selected source catalog under the destination catalog.
- **Selected Catalog and Sub Catalogs**: Use this option to move the source catalog and its sub-catalogs under the destination catalog.

- **Selected Catalog + Sub Catalogs + Parent Catalogs**: Use this option to move the source catalog, its sub-catalogs, and its parent catalogs under the destination catalog.
- **Include Root Catalog**: This option is enabled only when you select the **Selected Catalog + Sub Catalogs + Parent Catalogs** option. Use this option to move the root catalog of the source catalog under the destination catalog.

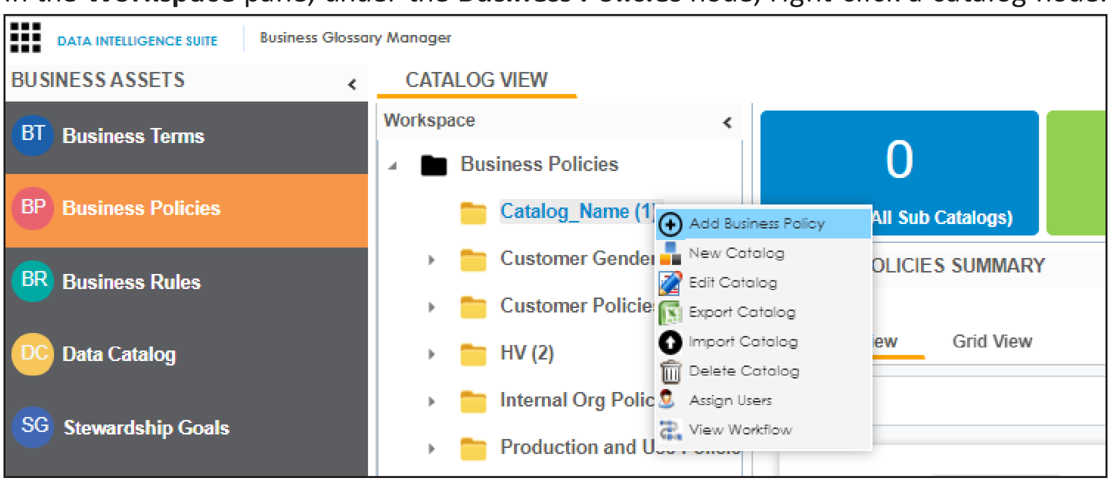
7. Click **Move**.
   The business term is moved to the selected catalog.

Creating Business Policies

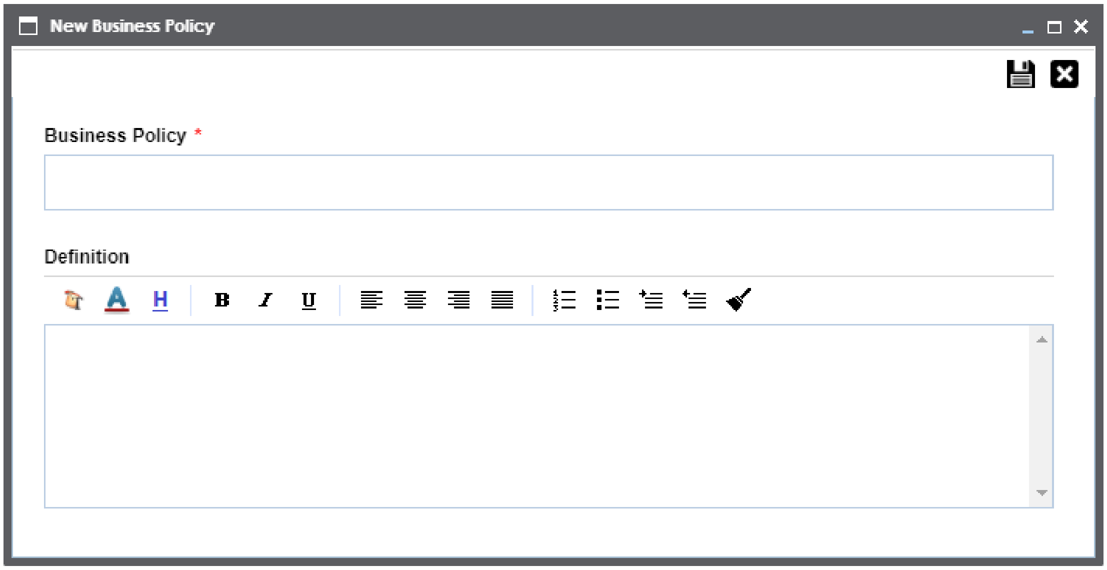
Business policies are globally defined set of enterprise-level principles. Using business policies, you can maintain business standards across your organization. You can create business policies in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

To create business policies, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.
2. In the browser pane, click **Business Policies**.
   The Glossary Workspace switches to the business policies view.
3. In the **Workspace** pane, under the **Business Policies** node, right-click a catalog node.



4. Click **Add Business Policy**.
   The New Business Policy page appears.



5. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.
   Refer to the following table for field descriptions.

Field Name	Description
Business Policy	Specifies the business policy of the organization. For example: Change of Address.
Definition	Specifies the definition of the business policy. For example: This policy documents the rules for change of customer's address.
Sensitive Data Indicator(SDI)	Specifies whether the business policy is sensitive. Switch **Sensitive Data Indicator(SDI)** to **Yes** to mark the business policy as sensitive.
Sensitive Data Indicator (SDI) Classification	Specifies the SDI classification of the business policy. For example, PHI. This list is enabled when Sensitive Data Indicator(SDI) is switched to Yes. For more information on configuring SDI classifications, refer to

Field Name	Description
	the Configuring Sensitive Data Indicator Classifications topic.
Sensitive Data Indicator (SDI) Description	Specifies the description of the SDI classification. For example: Protected Health Information. It is enabled when Sensitive Data Indicator (SDI) is switched to Yes. The field autopopulates based on the SDI classification.

Note: By default, sensitivity fields (Sensitive Data Indicator(SDI), Sensitive Data Indicator (SDI) Classification, and Sensitive Data Indicator (SDI) Description) are not enabled for business policies. You can enable them in the Business Glossary Manager Settings. For more information on enabling sensitivity fields, refer to the Configuring Asset Details topic.

6. Click .

   A business policy is created and added to the catalog.

Once the business policy is created, you can enrich it further by:

- Setting up associations
- Setting up additional information
- Adding rich media
- Setting up collaborations
- Viewing workflow logs

You can manage a business policy using the options available in the Options column in the business policy row. Managing business policy involves:

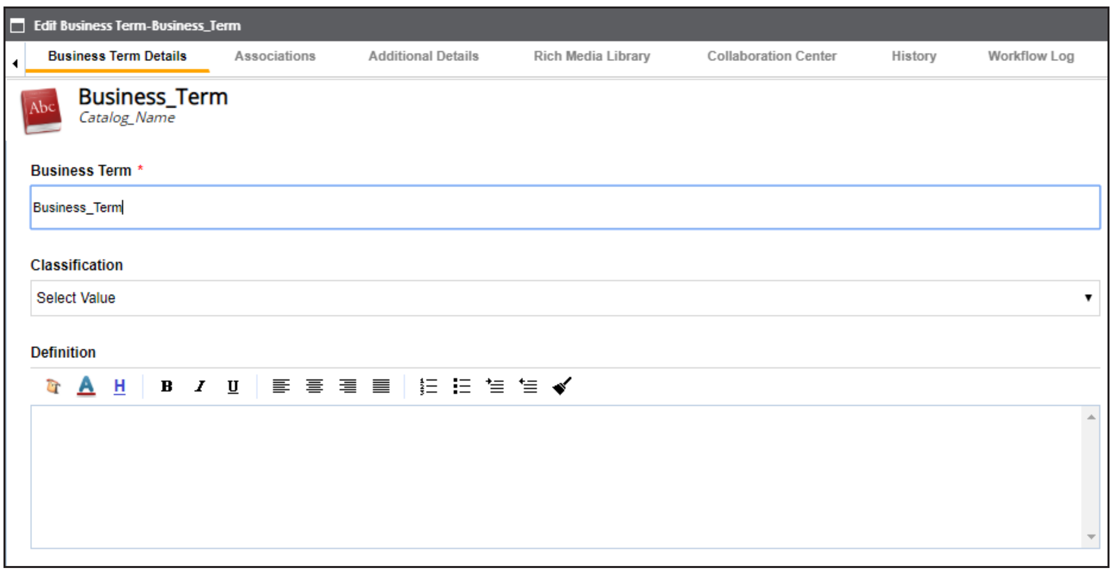
- Viewing, editing, or deleting business policies
- Viewing mind maps
- Viewing history

Setting Up Associations for Business Policies

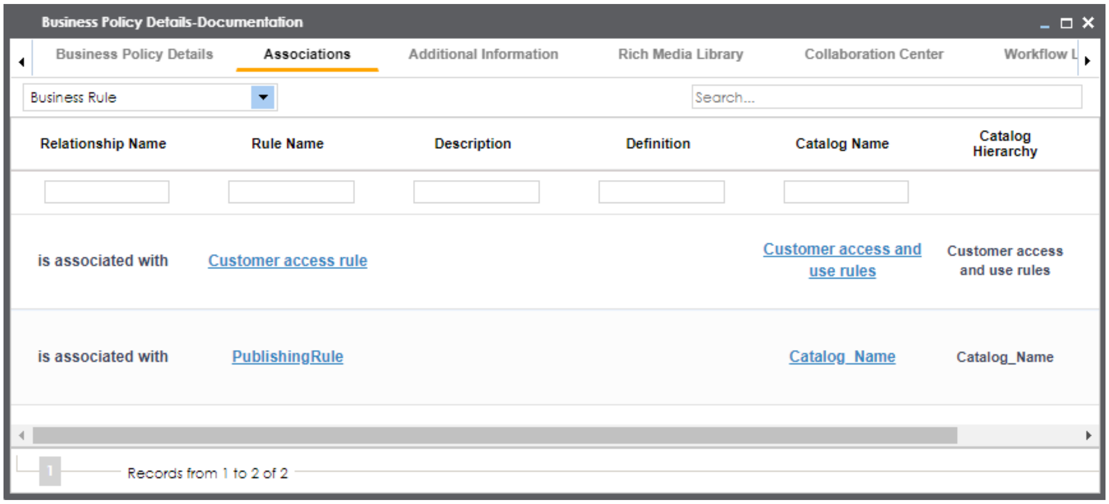
By default, you can associate business policies with business assets (business rules and business terms) and technical assets (columns). You can control the asset types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

To set up associations for business policies, follow these steps:

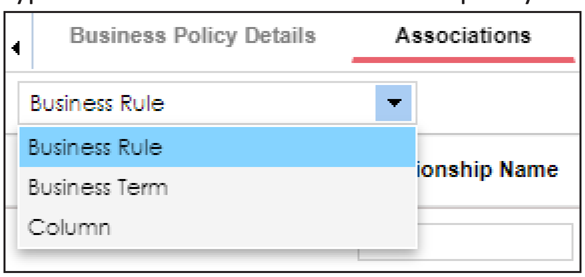
1. On the **Grid View** tab, under the **Options** column, click .
   The business policy opens in edit mode.



2. Click the **Associations** tab.

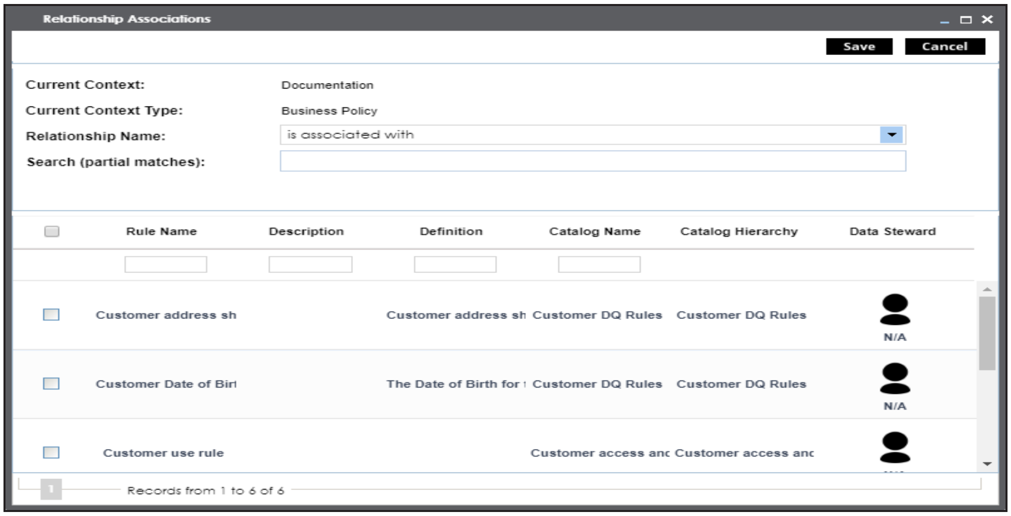


3. In the asset type (business rules, business terms, and columns) list, select the asset type to associate with the business policy.



4. Click +.

   The Relationship Associations page appears. Based on the asset type that you select, it displays a list of available business rules, business terms, or columns.



5. From the list, select assets to associate with your business policy.
   If you know the asset name, use the Search (partial matches) field to look up for it.
6. Click **Save**.
   The selected assets are associated with the business policy and added to the list of associations for an asset type.
   You can define as many associations as required.

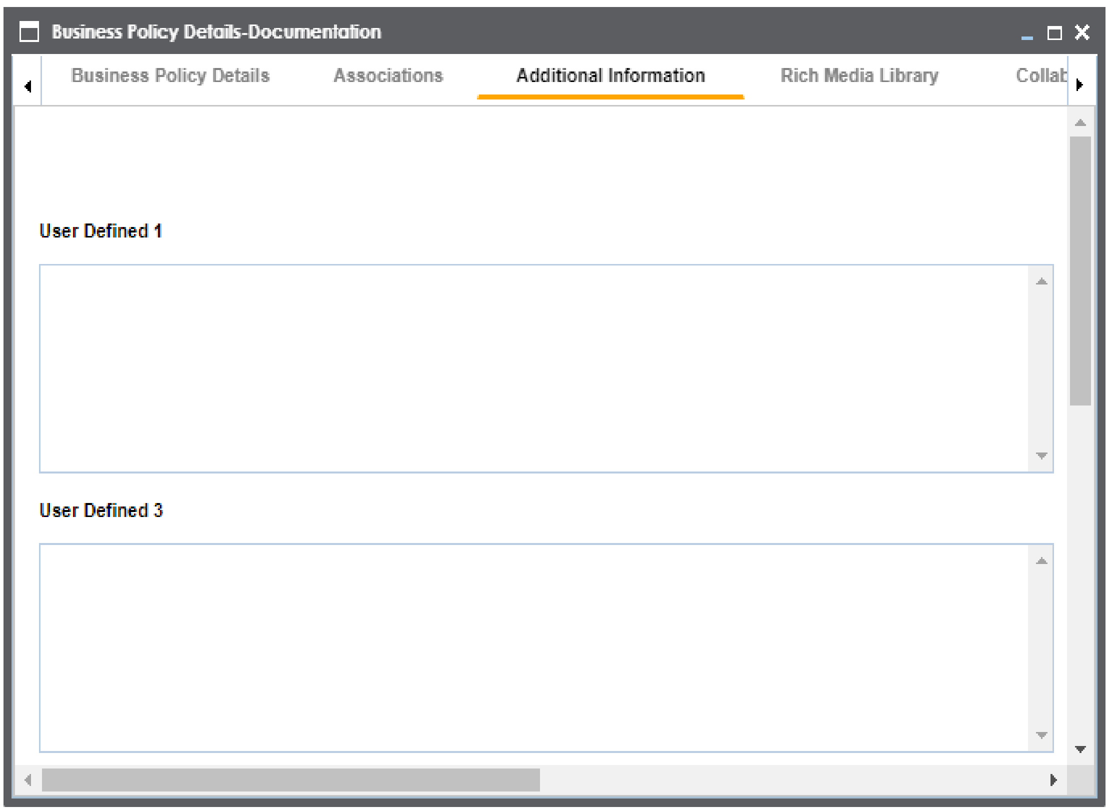
Setting Up Additional Details

You can set up custom additional information about a business policy to add more context.

To set up additional information, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click
   The business policy opens in edit mode.

2. Click the **Additional Information** tab and click .



3. Add information to the available user-defined fields.
   By default, these fields have generic labels. For example, User Defined 1. For more

information on configuring the UI labels of these fields, refer to the Configuring Language Settings topic.

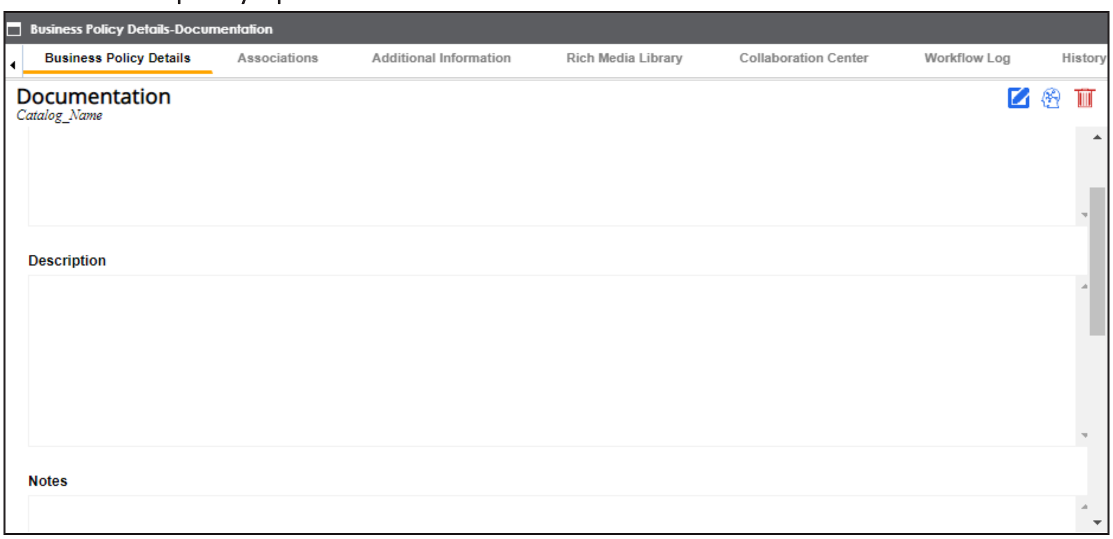
4. Click .
   The information you entered is added to the business policy.

Adding Rich Media

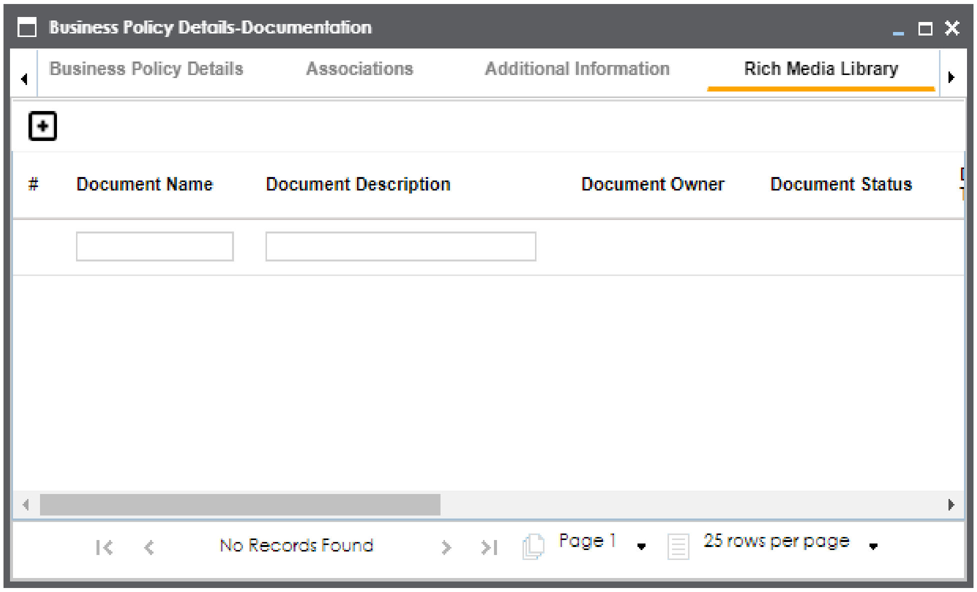
You can add supporting artifacts, such as text files, audio files, video files, and so on to a business policy.

To add rich media to a business policy, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business policy opens in edit mode.



2. Click the **Rich Media Library** tab.



3. Click .

   The New Document Form page appears.

4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
System Document Name	Specifies the name of the document being attached to the business policy. For example, Business Policy Details.
System Document Object	Drag and drop document files or use to select and upload document files.
System Document Owner	Specifies the document owner's name. For example, John Doe.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZlyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Intended Use	Specifies the intended use of the document.

Field Name	Description
Description	For example: The document is to keep a record of system description and its data dictionary.
Approval Required Flag	Specifies whether the document requires approval. Select the **Approval Required Flag** check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

5. Click .
   The selected rich media file and its description are added to the business policy.

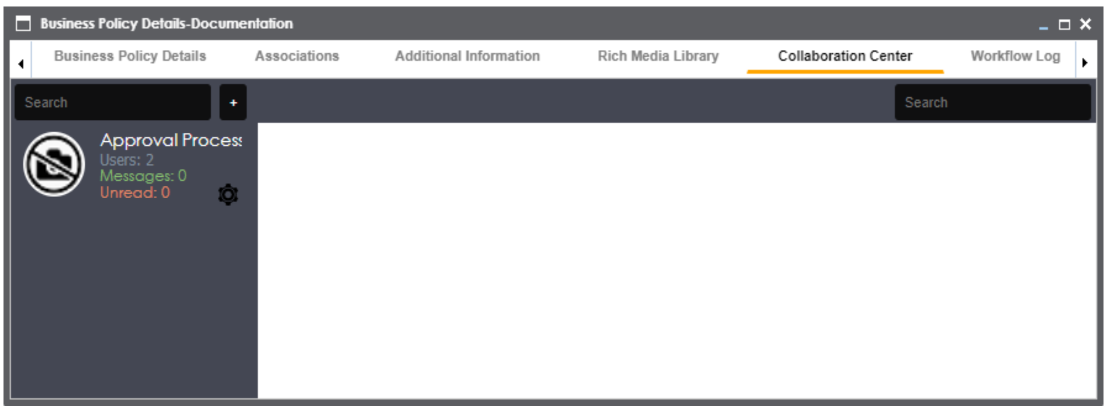
Setting Up Collaborations

You can start discussions on business assets or a relevant topic with your team using the Collaboration Center. This enables you and your team to work together.

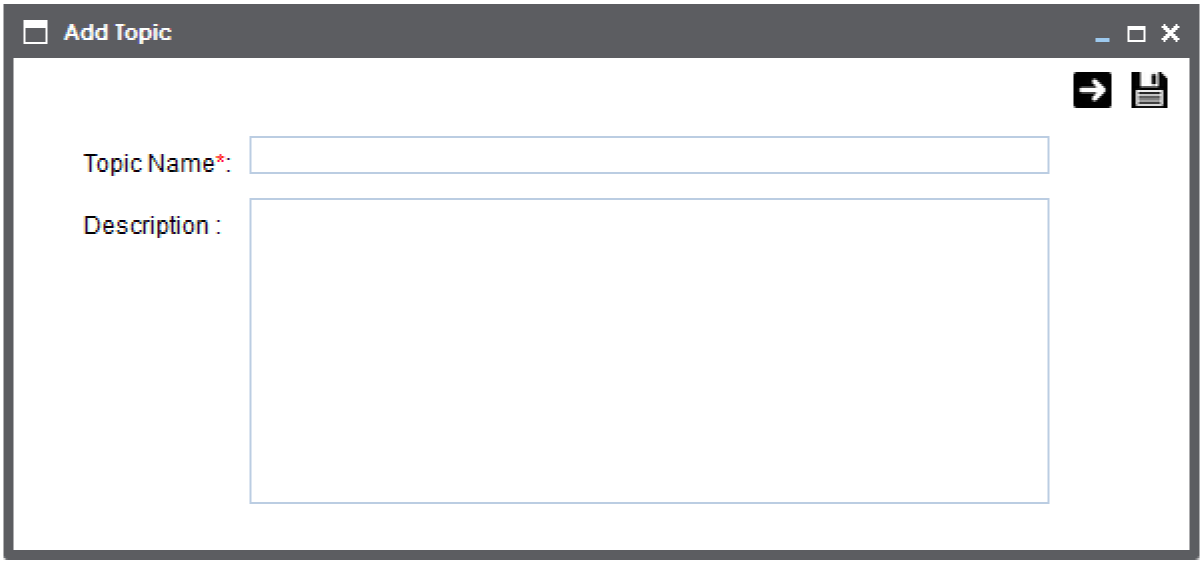
To set up collaborations, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business policy opens in edit mode.

2. Click the **Collaboration Center** tab.



3. Click .
   The Add Topic page appears.



4. Enter **Topic Name** and **Description**.
5. Click .
   The User Assignment page appears.
6. Select the users or your team members that you want to collaborate with.
7. Click .
   The topic is saved and added to the list of topics in the Collaboration Center. The topic is also added to the Collaboration Center of the users that you selected earlier.

You can manage a topic using the options available under Topic Options (). Managing a topic involves:

- Viewing, editing, or deleting a topic
- Assigning users
- Managing notifications
- Saving topic conversations
- Sharing a topic

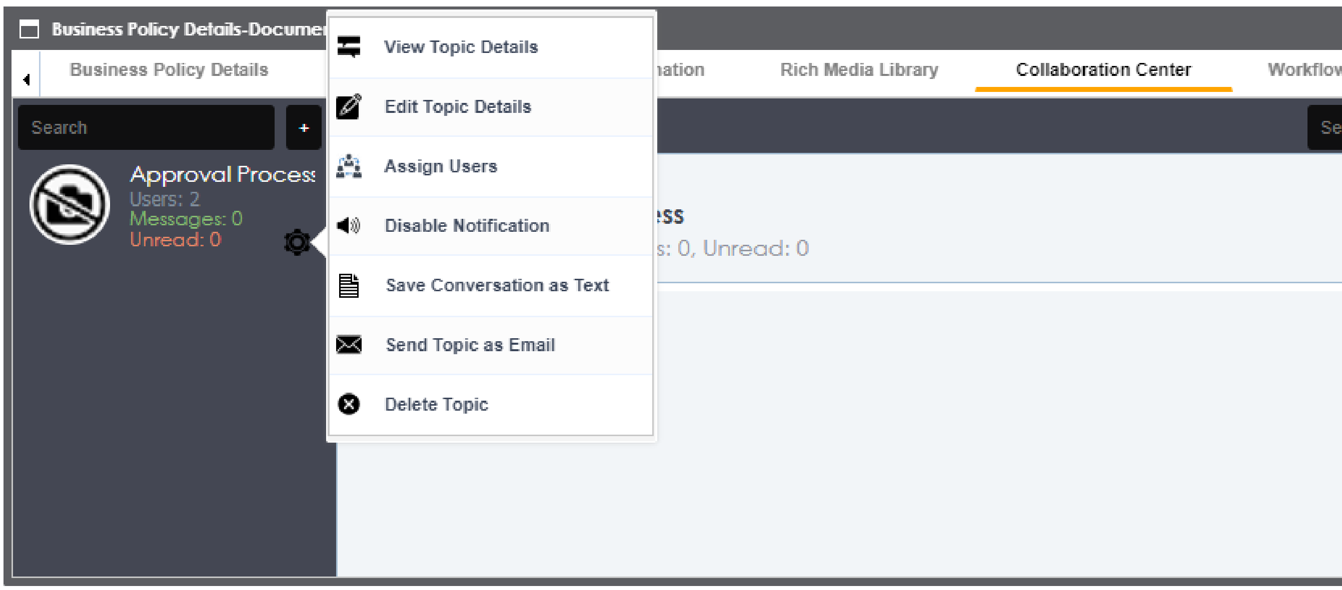
Managing Topics

Managing topics involves:

- Viewing, editing, or deleting a topic
- Assigning users
- Managing notifications
- Saving topic conversations
- Sharing a topic

To manage topics, follow these steps:

1. Click the **Collaboration Center** tab.
2. In the list of topics, against the topic you want to manage, click .
   Topic options appear.



3. Use the following options:

   View Topic Details

Use this option to look at the topic and its information, such as the creator, the creation date and time, and the modification date and time.

Edit Topic Details

Use this option to edit the topic name and description to enrich it further.

Assign Users

Use this option to assign multiple users to collaborate with you and contribute to the topic.

Disable Notification

Use this option to choose whether you are notified whenever the topic is updated.

Save Conversation as Text

Use this option to save topic conversations to a text file. Using this option downloads a text file with the conversation, authors, and time stamp.

Send Topic as Email

Use this option to send the topic and its conversations in an email. Clicking **Send Topic as Email** opens an email recipient list, where you can select one or multiple recipients. Click to send an email to the selected recipients.

Delete Topic

Use this option to delete a topic that is no longer required.

Viewing Workflow Logs

You can view the flow of actions of the workflow assigned to a business policy. Along with other information, the workflow log displays the current state of the business policy in the workflow.

To view workflow log, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business policy opens in edit mode.

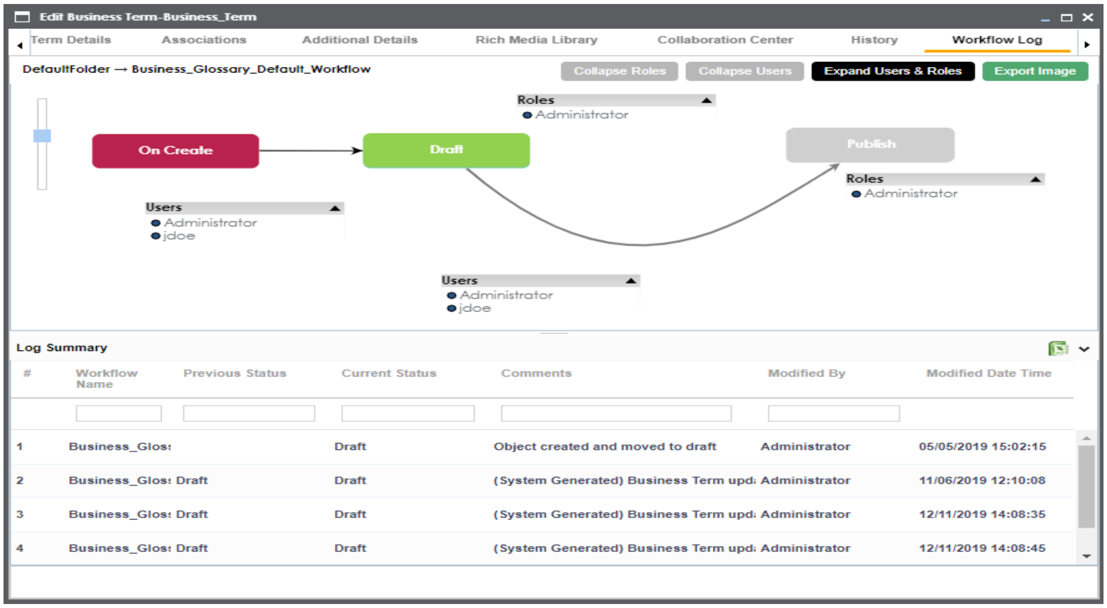
2. Click the **Workflow Log** tab.
   By default, it displays only the stages of the workflow and highlights the current stage. Use the following options to view more information:

   Expand Users & Roles

   Use this option to display users and roles associated with each workflow stage. You can choose to hide users or roles using the Collapse Users and Collapse Roles options.

   Log Summary

   Use this pane to view the log of the actions performed.



You can export the workflow log summary in XLSX format. Click to export the summary.

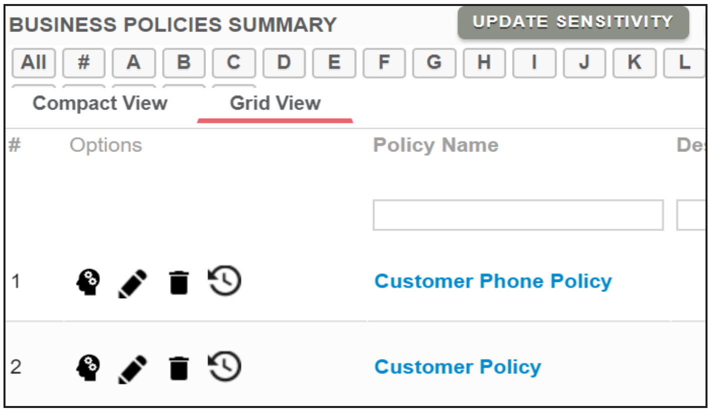
Managing Business Policies

Managing business policies involves:

- Editing or deleting business policies
- Viewing mind maps
- Exporting business policies
- Viewing history

To manage business policies, follow these steps:

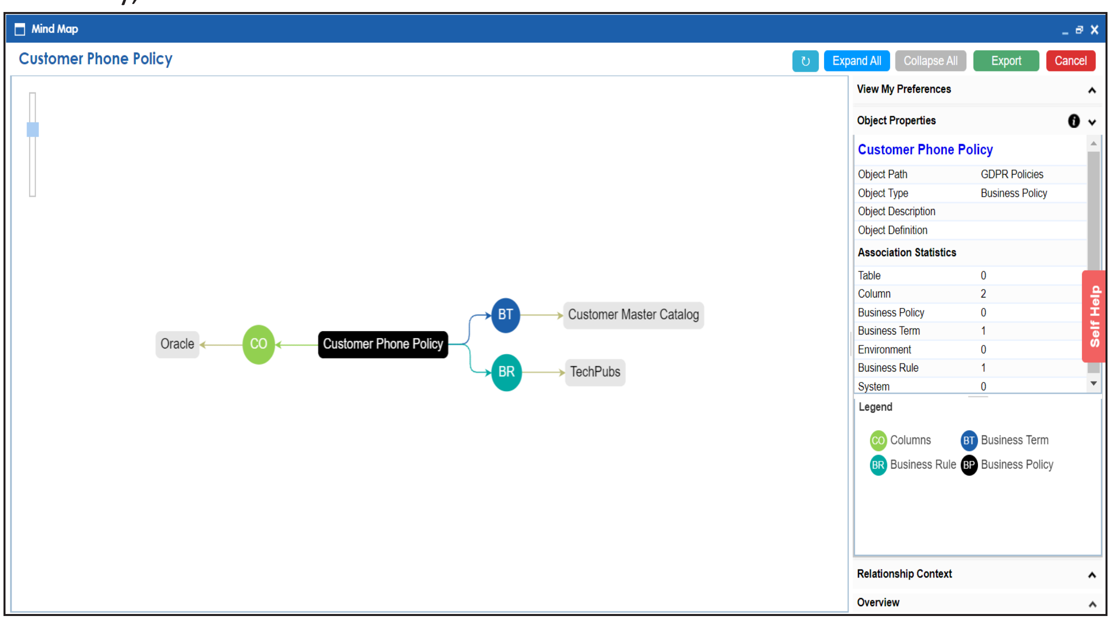
1. Click the **Grid View** tab.



2. Use the following options available under the Options column:

View Mind Map ( )

Use this option to view a business policy's mind map. A mind map displays the pictorial representation of the business policy, its associations, relationships, sensitivity, and so on.



Use the following options to work on the mind map:

Expand (+): By default, a mind map is displayed up to the first level. To drill it down further, hover on a node and click the plus (+) icon or right-click a node and the click **Expand Asset Level**.
Export: To save the mind map to XLSX format or as an image, use **Export**.
Object Properties: To view the properties of an object in the mind map, select the object in the diagram. The Object Properties section displays the properties of the selected object.
For more information on working on a mind map, refer to the Viewing Mind Maps topic.

Edit Business Policy ( )

Use this option to enrich a business policy by defining associations, attaching rich media, and so on.

Delete Business Policy ( )

Use this option to delete a business policy that is no longer required.

View History ( )

Use this option to view all the actions performed on a business policy since it was created. Alternatively, on the Edit Business Policy page, click the **History** tab.

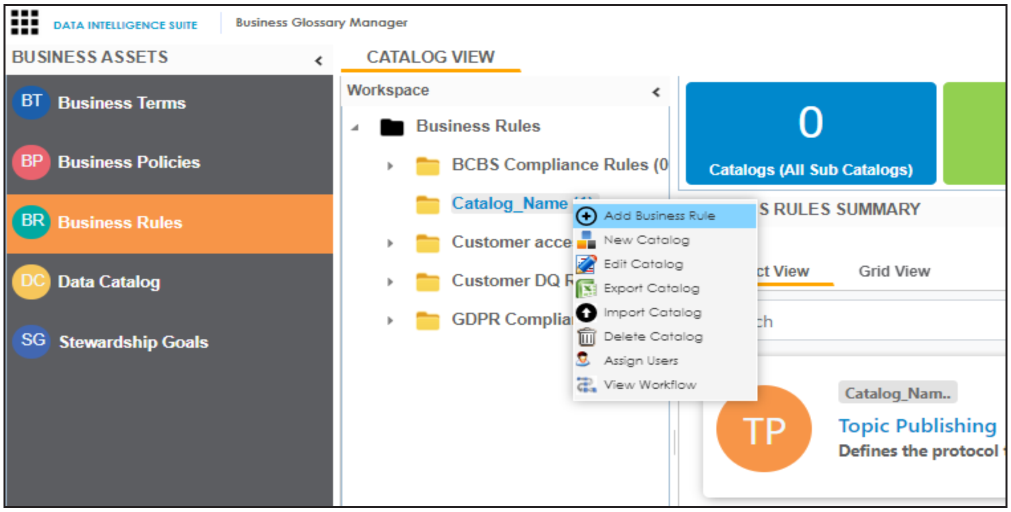
Creating Business Rules

Business rules define a set of protocols to be followed in an organization. You can create business rules in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

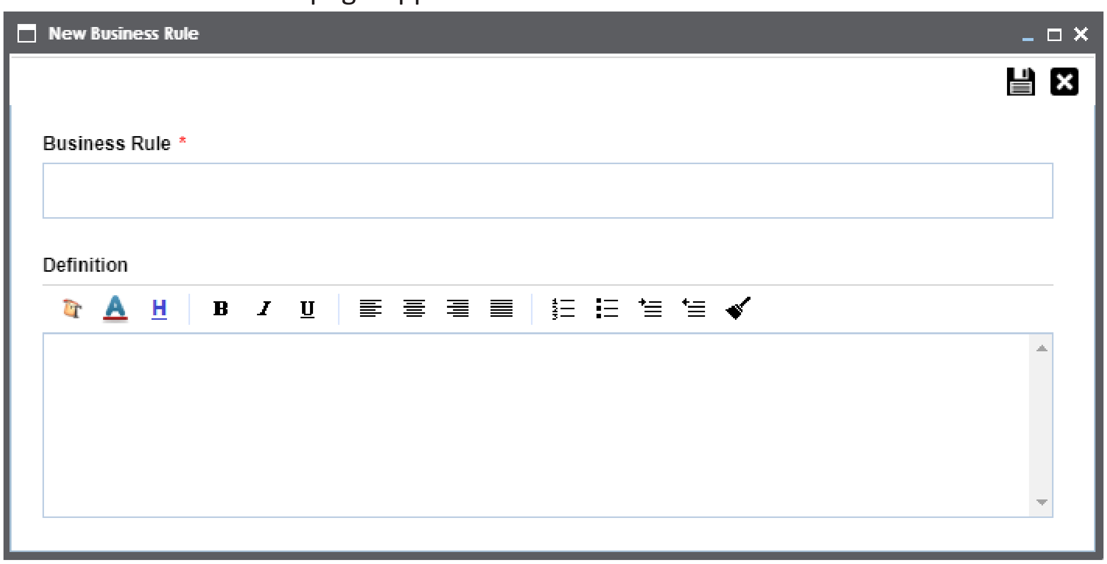
To create business rules, follow these steps:

1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.
2. In the browser pane, click **Business Rules**.
   The Workspace switches to the business rules view.

3. In the **Workspace** pane, under the **Business Rules** node, right-click a catalog node.



4. Click **Add Business Rule**.
   The New Business Rule page appears.



5. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.
   Refer to the following table for field descriptions.

Field Name	Description
Business Rule	Specifies the business rule of the organization.

Field Name	Description
	For example: Customer date of birth should be a valid date.
Definition	Specifies the definition of the business rule. For example: A customer's date of birth should be a valid date as per the US format.
Sensitive Data Indicator(SDI)	Specifies whether the business rule is sensitive. Switch **Sensitive Data Indicator(SDI)** to **Yes** to mark the business rule as sensitive.
Sensitive Data Indicator (SDI) Classification	Specifies the SDI classification of the business rule. For example, PHI. This list is enabled when Sensitive Data Indicator(SDI) is switched to Yes. For more information on configuring SDI classifications, refer to the Configuring Sensitive Data Indicator Classifications topic.
Sensitive Data Indicator (SDI) Description	Specifies the description of the SDI classification. For example: Protected Health Information. It is enabled when Sensitive Data Indicator(SDI) is switched to Yes. The field autopopulates based on the SDI classification.

Note: By default, sensitivity fields (Sensitive Data Indicator(SDI), Sensitive Data Indicator (SDI) Classification, and Sensitive Data Indicator (SDI) Description) are not enabled for business rules. You can enable them in the Business Glossary Manager Settings. For more information on enabling sensitivity fields, refer to the Configuring Asset Details topic.

6. Click .
   A business rule is created and added to the catalog.

Once the business rule is created, you can enrich it further by:

- Setting up associations
- Attaching documents
- Viewing workflow logs

You can manage a business rule using the options available under the Options column on the Grid View tab. Managing business rules involves:

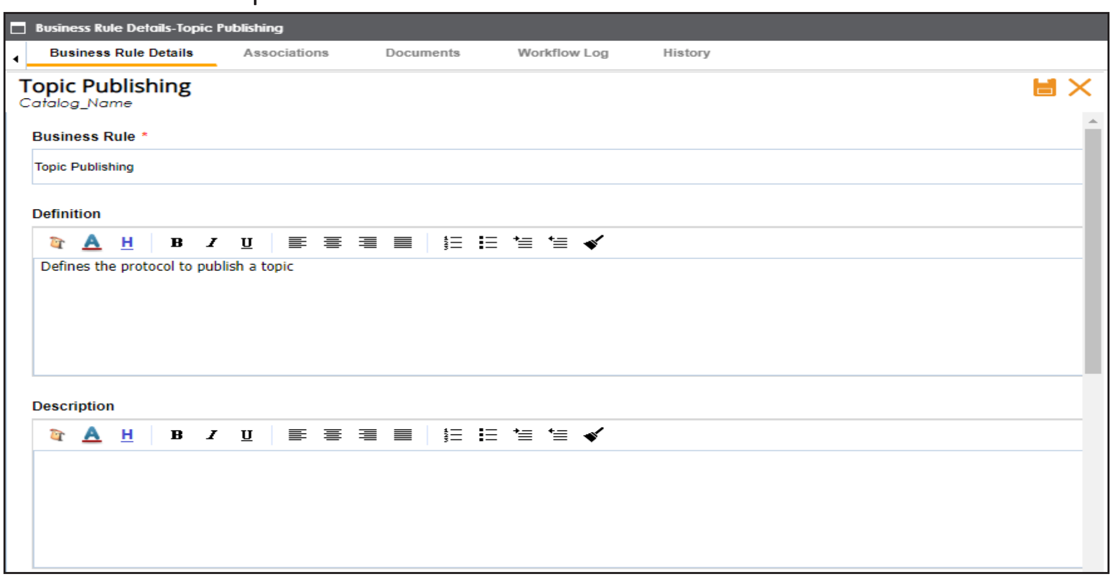
- Viewing, editing, or deleting business rules
- Viewing mind maps
- Viewing history

Setting Up Associations for Business Rules

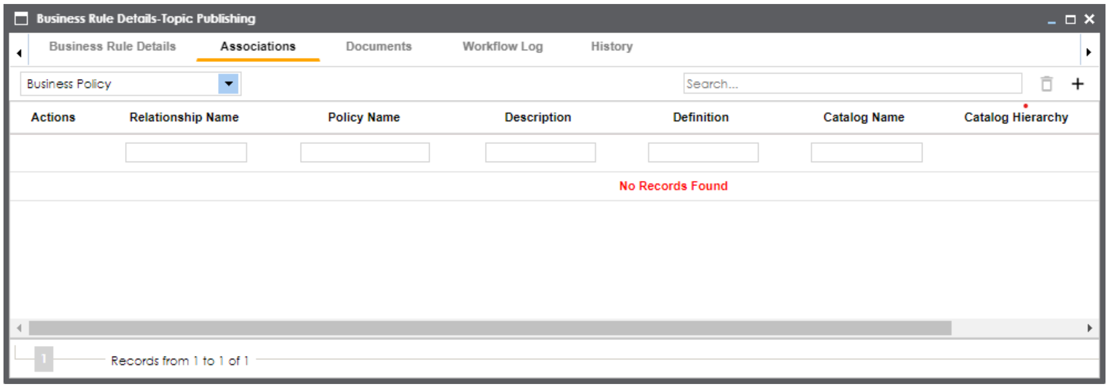
By default, you can associate business rules with business assets (business policies). You can control the asset types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

To set up associations for business rules, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business rule opens in edit mode.



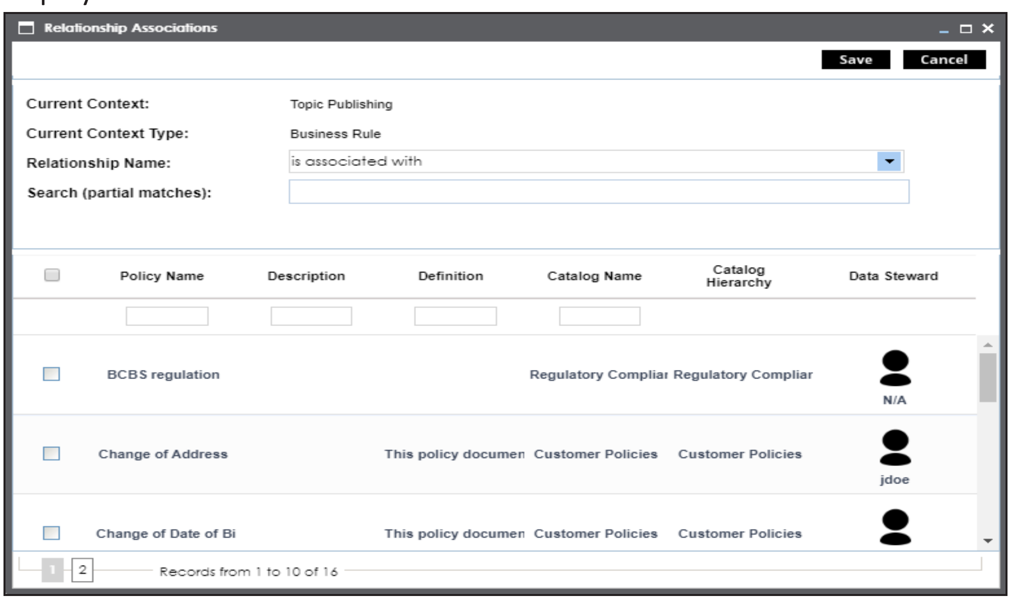
2. Click the **Associations** tab.



3. In the asset type list, select an asset type to associate with the business rule.

4. Click +.

The Relationship Associations page appears. Based on the asset type that you select, it displays a list of available assets.



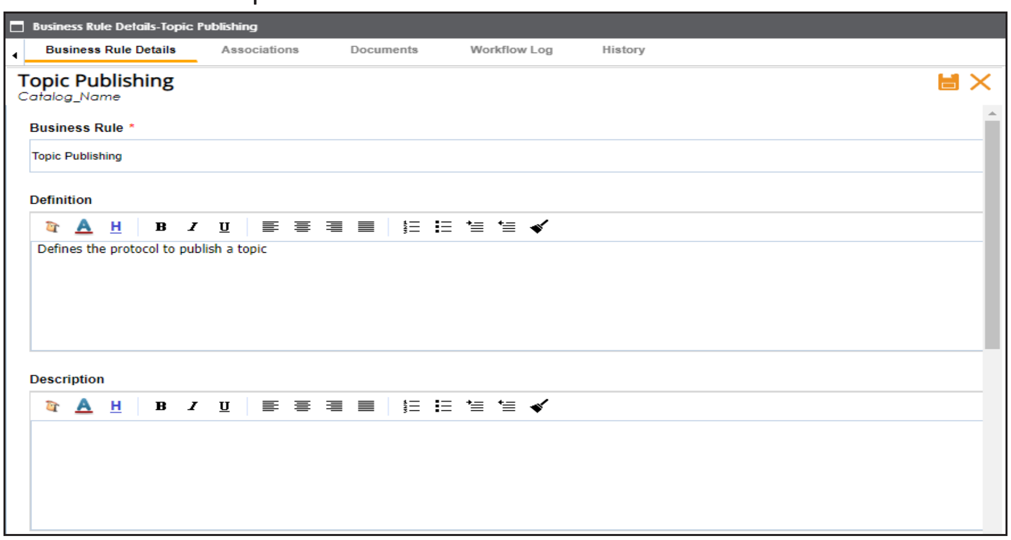
5. From the list, select assets to associate with your business rule.
   If you know the asset name, use the Search (partial matches) field to look up for it.
6. Click **Save**.
   The selected objects are associated with the business rule and added to the list of associations.
   You can define as many associations as required.

Adding Documents

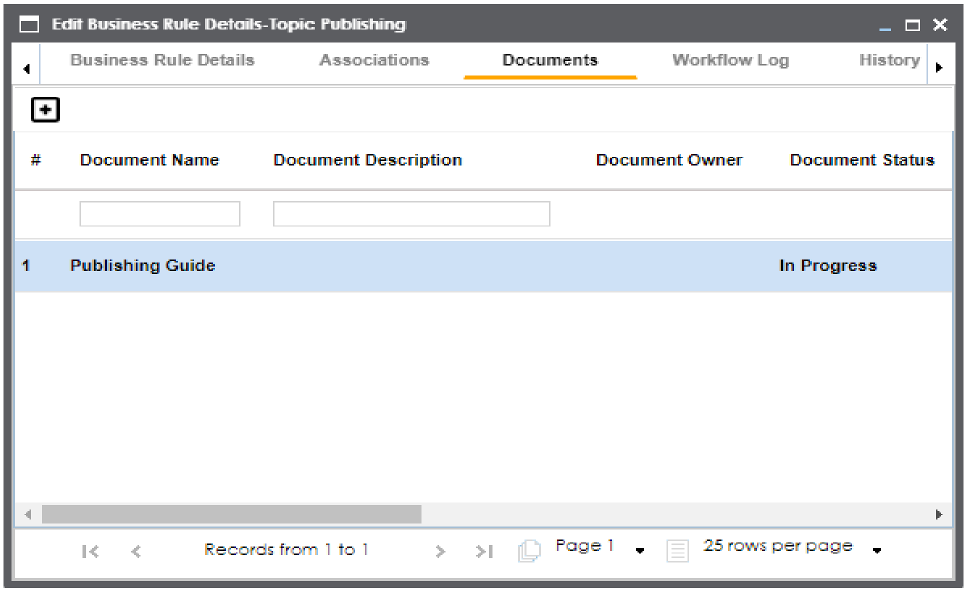
You can add supporting documents in the Word, Text, or PDF formats to a business rule.

To add documents to a business rule, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business rule opens in edit mode.

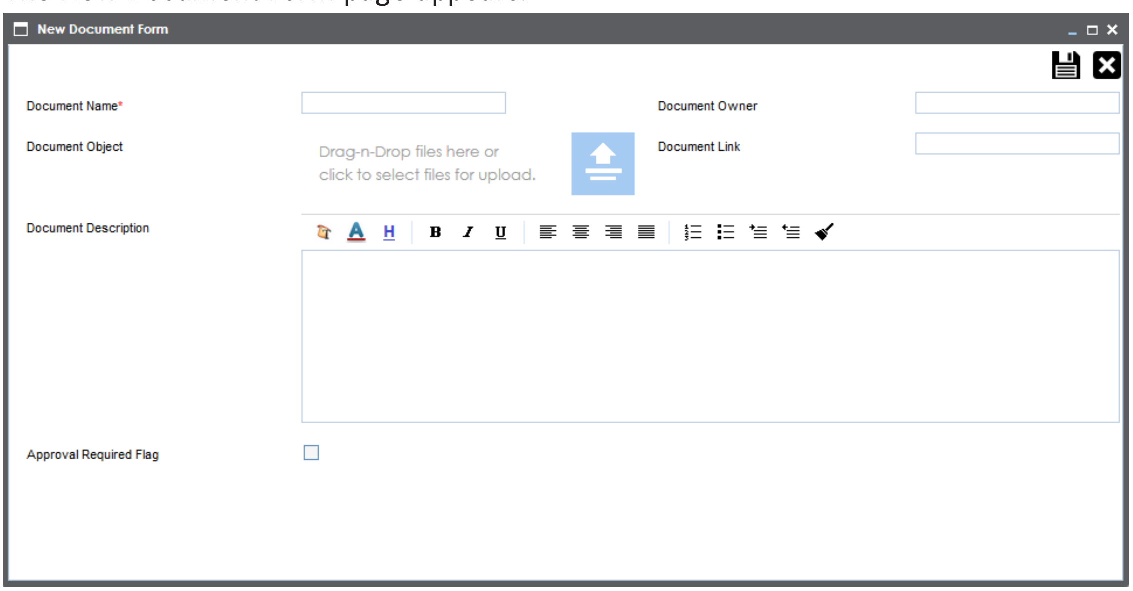


2. Click the **Documents** tab.



3. Click .

The New Document Form page appears.



4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
System Document Name	Specifies the name of the document being attached to the business rule. For example, Business Rule Details.
System Document Object	Drag and drop document files or use to select and upload document files.
System Document Owner	Specifies the document owner's name. For example, John Doe.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOnb5YkMBq4ptA7jhg5/view
Intended Use Description	Specifies the intended use of the document. For example: The document is to keep a record of system description and its data dictionary.
Approval Required Flag	Specifies whether the document requires approval. Select the **Approval Required Flag** check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

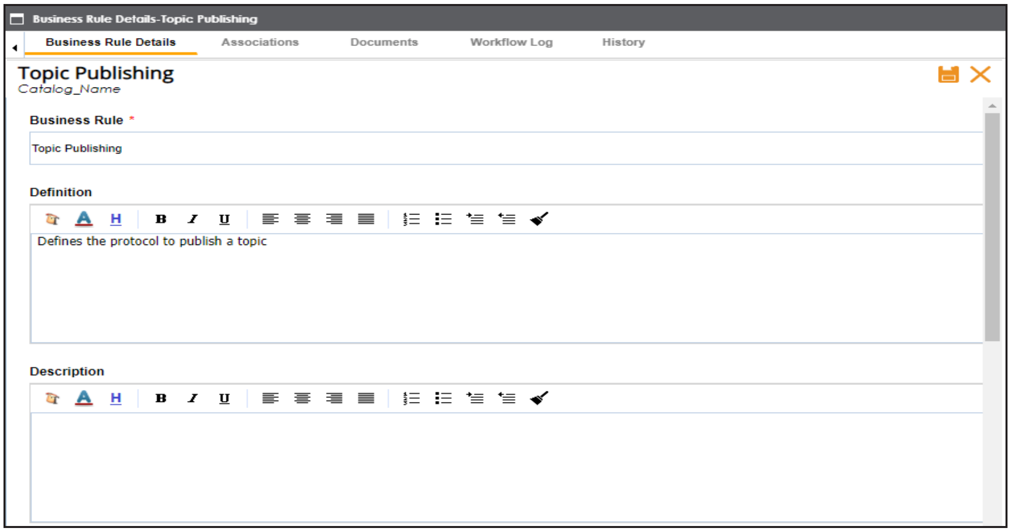
5. Click .
   The selected document and its description are added to the business rule.

Viewing Workflow Logs

You can view the flow of actions of the workflow assigned to a business rule. Along with other information, the workflow log displays the current state of the business rule in the workflow.

To view workflow log, follow these steps:

1. On the **Grid View** tab, under the **Options** column, click .
   The business rule opens in edit mode.



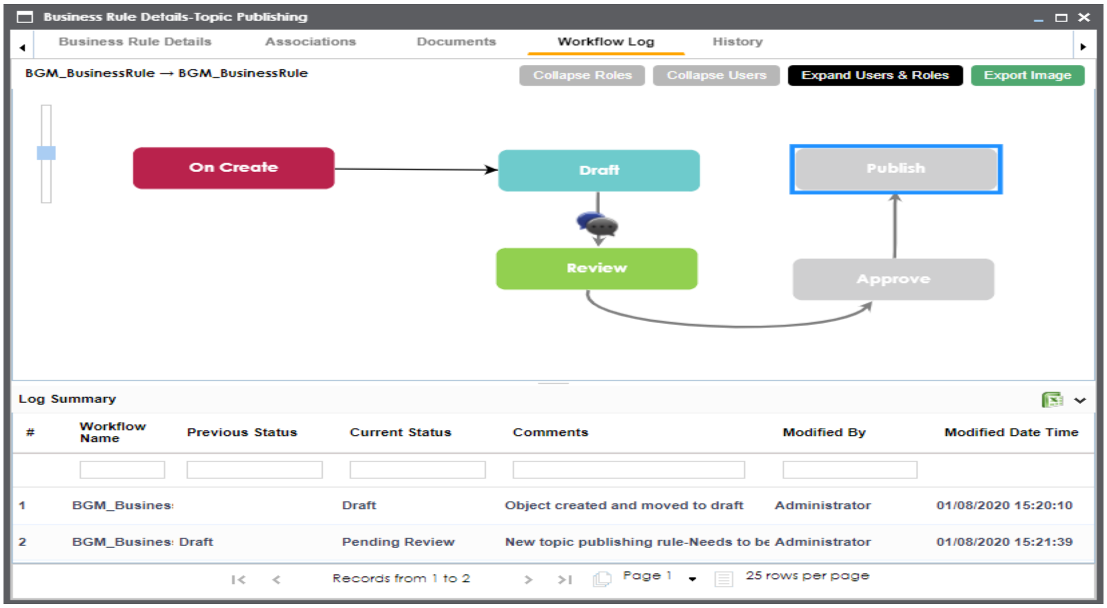
2. Click the **Workflow Log** tab.
   By default, it displays only the stages of the workflow and highlights the current stage. Use the following options to view more information:

   Expand Users & Roles

   Use this option to display users and roles associated with each workflow stage. You can choose to hide users or roles using the Collapse Users and Collapse Roles options.

   Log Summary

   Use this pane to view the log of the actions performed.



You can export the workflow log summary in XLSX format. Click to export the summary.

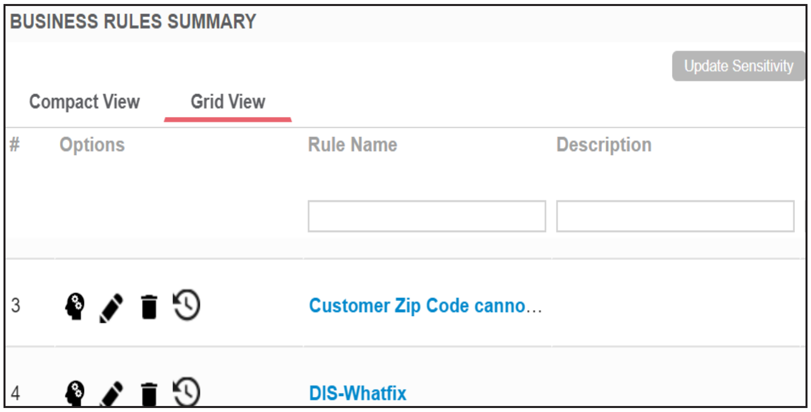
Managing Business Rules

Managing business rules involves:

- Editing or deleting business rules
- Viewing mind maps
- Viewing history

To manage business rules, follow these steps:

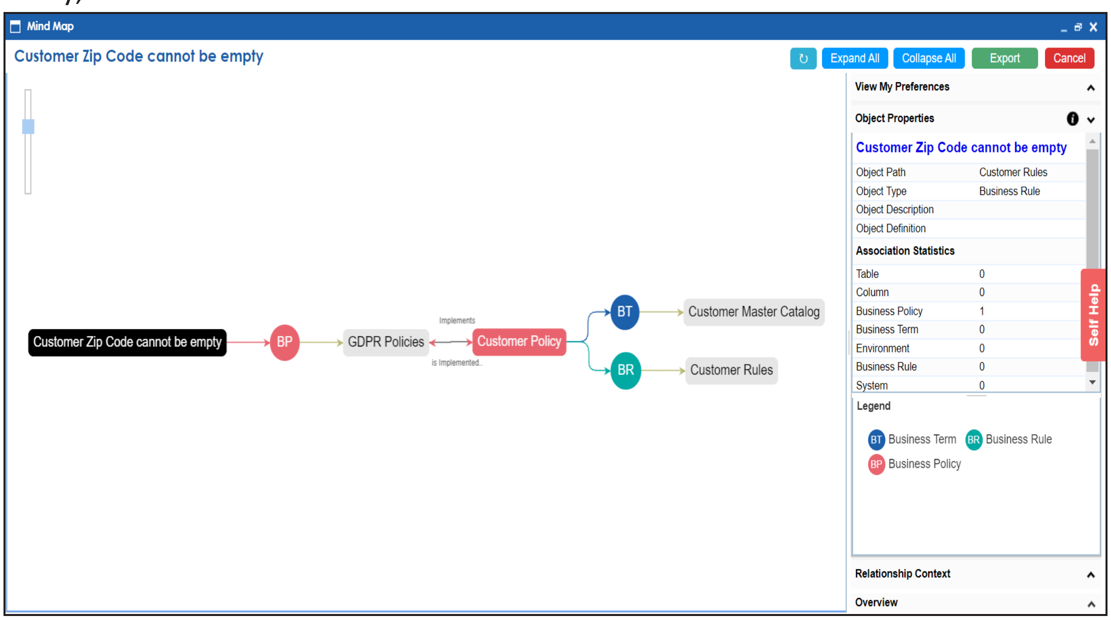
1. Click the **Grid View** tab.



2. Use the following options:

View Mind Map ( )

Use this option to view a business term's mind map. A mind map displays the pictorial representation of the business rule, its associations, relationships, sensitivity, and so on.



Use the following options to work on the mind map:

Expand (+): By default, a mind map is displayed up to the first level. To drill it down further, hover on a node and click the plus (+) icon or right-click a node and the click **Expand Asset Level**.

Export: To save the mind map to XLSX format or as an image, use **Export**.

Object Properties: To view the properties of an object in the mind map, select the object in the diagram. The Object Properties section displays the properties of the selected object.

For more information on working on a mind map, refer to the Viewing Mind Maps topic.

Edit Business Rule ( )

Use this option to enrich a business rule by defining associations, attaching documents, and so on.

Delete Business Rule ( )

Use this option to delete a business rule that is no longer required.

View History ( )

Use this option to view all the actions performed on a business rule since it was created. Alternatively, on the Edit Business Rule page, click the **History** tab.

Viewing Mind Maps

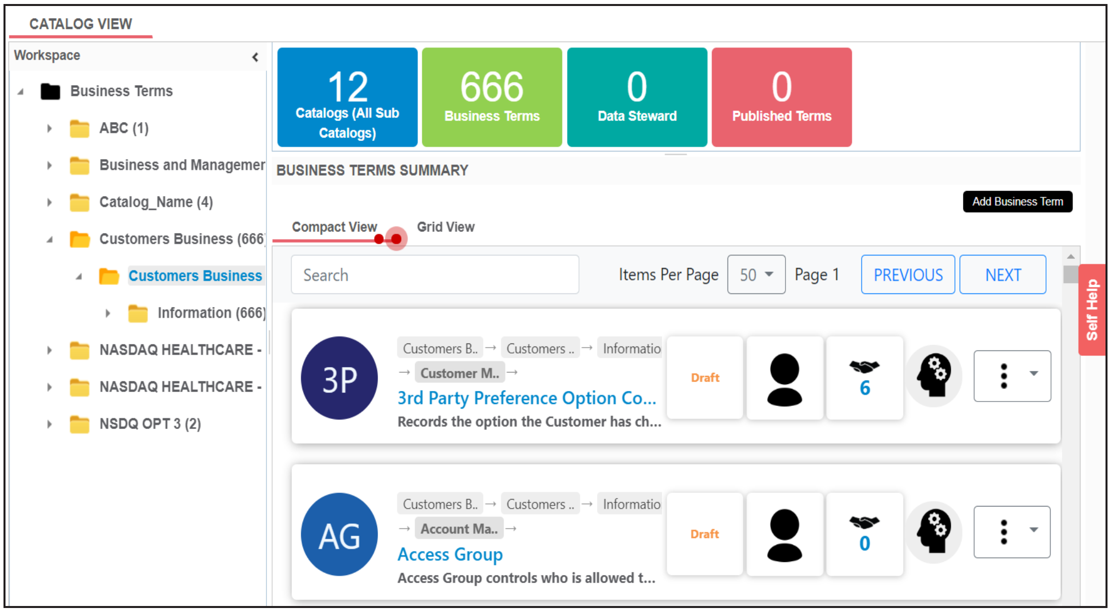
A mind map displays the pictorial representation of a business asset and its association with other assets. On a mind map, associated technical assets appear on the left side and associated business assets appear on the right side of the business asset. You can select an asset on a mind map and view its properties, association statistics, and sensitivity under the Object Properties pane.

To view mind maps, follow these steps.

1. In the browser pane, click <Business_Asset_Name>.

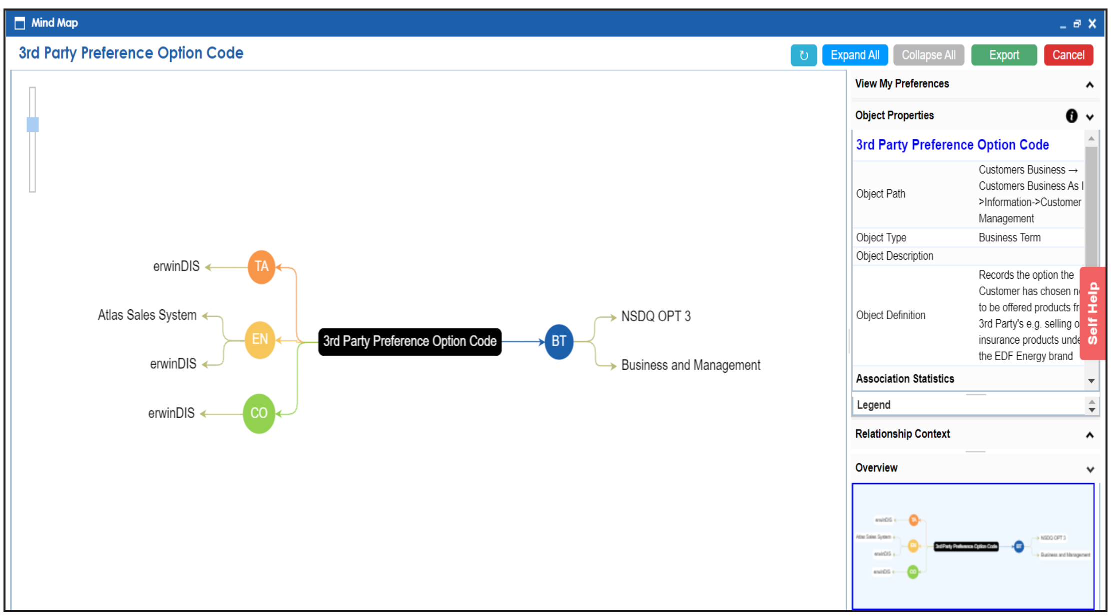
   The Workspace switches to the business asset view. For example, if you click Business Terms in the browser pane, the Workspace switches to the Business Terms view.

2. In the **Workspace** pane, click the required catalog.



3. Under **<Business_Asset> Summary**, click for the required business asset.

The Mind Map page appears.



4. Use the following options to work on the mind map:

Expand Asset Level

Use this option to expand the mind map at asset level. Hover on a node and click the plus (+) icon or right-click a node, and then click **Expand Asset Level**.

Reload Mind Map Diagram ( )

Use this option to reload the mind map.

Expand All

Use this option to expand the mind map to view the associated technical and business assets.

Collapse All

Use this option to collapse the expanded nodes and restore the mind map to its original form.

Export

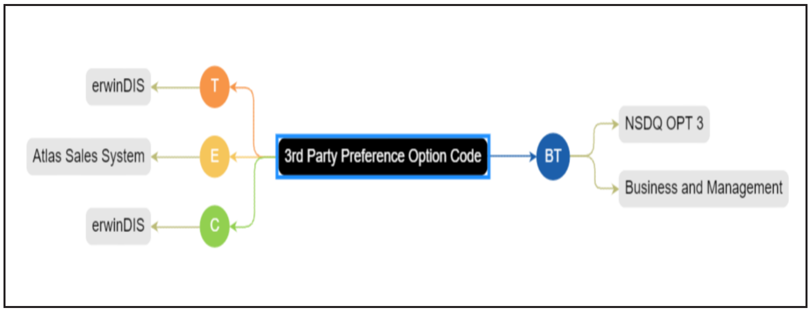
Hover over **Export** and use the following options:
Mind Map - Excel Report: Use this option to download the mind map report in the .xlsx format. Ensure that you expand the mind map before downloading the report.
Sensitivity Details - Excel Report: Use this option to download the sensitivity report of all associated assets in the .xlsx format. This report includes sensitive data indicator (SDI), SDI classification, and SDI description of the associated assets.
Mind Map - Image: Use this option to download the mind map as an image, in .jpg format. Ensure that you expand the mind map before downloading the mind map image.

View My Preferences

You can set your preferences to view the mind map according to your requirements. Expand the **View My Preferences** pane and use the following options:

Asset Hierarchy Background

Select the **Gray Background** check box to display gray colored background for the asset hierarchy nodes. For example, the following mind map displays nodes in the hierarchy with a gray-colored background.

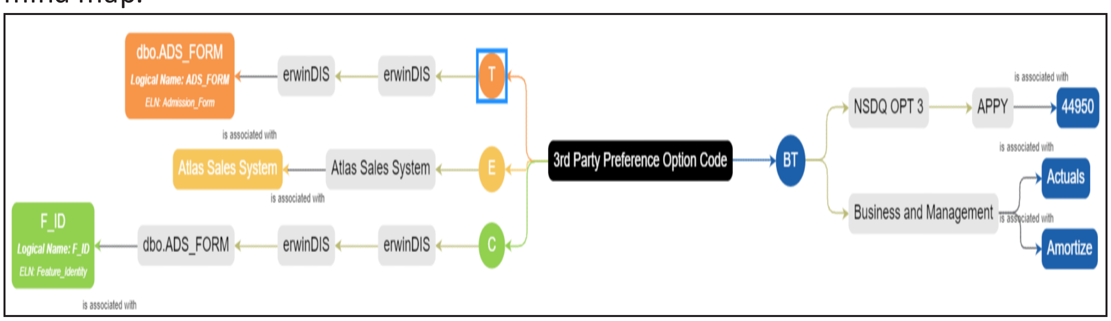


Relationship Options

Use the following options to configure relationship options:

- **Include Relationships**: Use this option to display relationships between the assets on the mind map.
- **Switch to Enterprise Relationship configuration**: Use this option to apply the selected line color and type configured in the Business Glossary Manager Settings.

  For example, in the following mind map, the relationship (is associated with) and the line color as set in Business Glossary Manager Settings appear on the mind map.



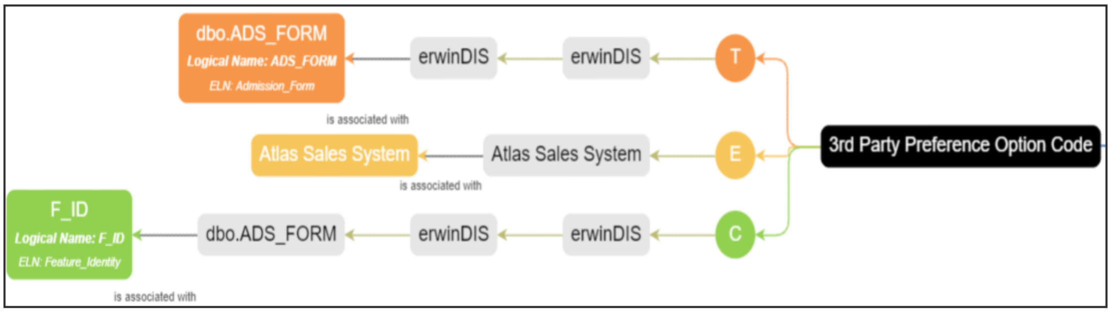
View Logical Names

Use the following options to view logical and expanded logical names of tables and columns on the mind map:

- **Logical Names**: Use this option to view logical names of tables and columns on the mind map.
- **Expanded Logical Names**: Use this option to view expanded logical names of tables and columns on the mind map.

  You can configure logical names and expanded logical names of tables and columns in the Metadata Manager.

  For example, the following mind map displays logical names and expanded logical names.



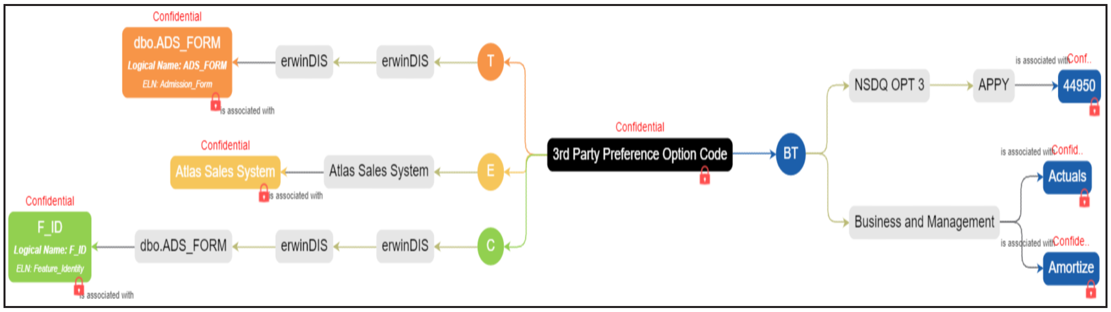
View Sensitivity

Use the following options to view sensitivity details of the assets on the mind map:

- **Sensitivity Data Indicator(Y/N)**: Use this option to view the sensitive assets on the mind map.
- **Sensitive Data Classification**: Use this option to view the sensitive data classification of the assets on the mind map.

  For example, the following mind map displays the sensitive data indicator as sensitive () and sensitive data classification as Confidential.

  For more information on updating sensitivity of assets in a mind map, refer to the Updating Sensitivity topic.

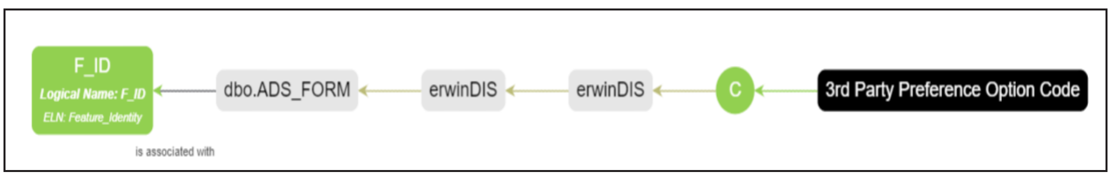


Filter

To filter the components of mind map, expand the **Filter** pane and use the following options:

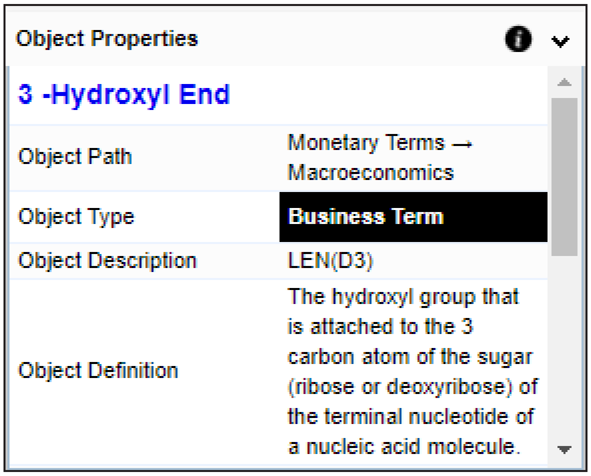
- **By Asset Type**: Use this option to filter in the required asset types in the mind map
- **By Relationship**: Use this option to filter in the required assets in the mind map based on relationship.

  For example, if you select only Column for By Asset Type and is associated with for By Relationship, then only associated columns with is associated with relationship are shown in the mind map.



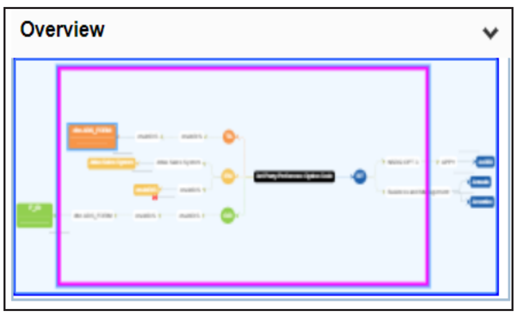
Object Properties

Click an asset on mind map and view its properties with association statistics and sensitivity. Asset properties differ for technical and business assets.



Overview

Expand this pane to open a pan view of the mind map. You can slide the purple box to navigate across the mind map.



Updating Sensitivity in Bulk

Updating sensitivity involves marking business assets sensitive with an appropriate sensitive data indicator classification. Although you can set up sensitivity of a business asset while creating it, you can also update sensitivity of assets in bulk using:

- Mind map: Use this option when you want to update sensitivity of associated business and technical assets.
- Grid view: Use this option when you want to update sensitivity of an asset type.

Before updating sensitivity of business assets, ensure that you enable sensitivity for the asset type. For more information on enabling sensitivity for an asset type, refer to the Configuring Asset Details topic.

You can configure the email notifications to be sent whenever sensitivity is updated in bulk. For more information on configuring the notification, refer to the Configuring Sensitivity Update Notifications topic.

Updating Sensitivity

You can update sensitivity of an asset and its associated assets in bulk through a mind map. Associated assets are of two types, technical and business assets. Technical assets refer to columns, tables, environments, and systems. Business assets refer to business terms, business policies, business rules, and other business assets defined in the Business Glossary Manager Settings.

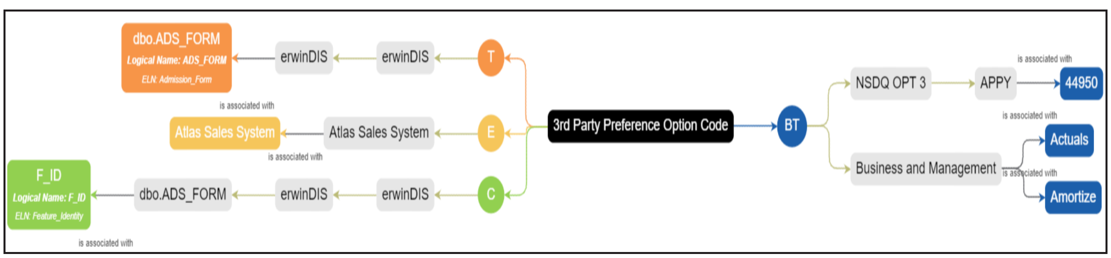
Selected Asset

You can update sensitivity of an asset individually through a mind map.

To update sensitivity of an asset, follow these steps:

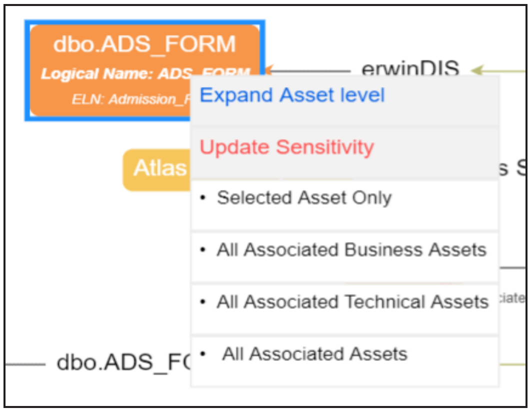
1. On the mind map, click **Expand All**.

   The mind map appears in its expanded form.



2. Right-click the required asset.

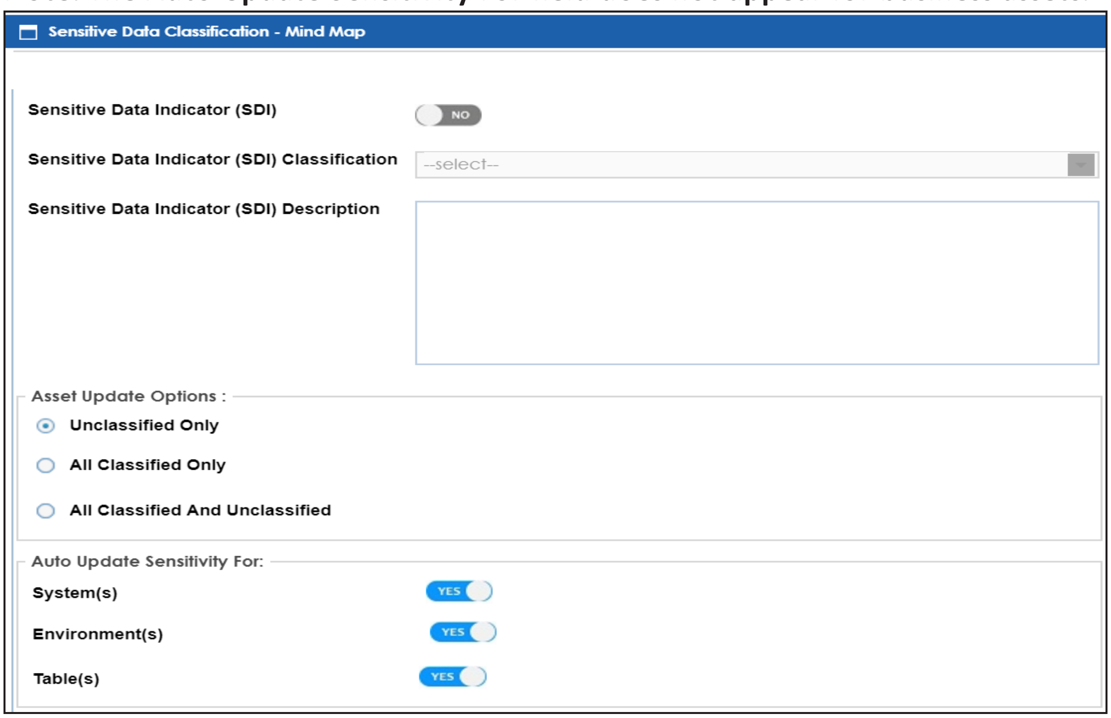
   The options available for the asset appear.



3. Click **Selected Asset Only**.

   The Sensitive Data Classification - Mind Map page appears.

   Note: The Auto Update Sensitivity For field does not appear for business assets.



4. Enter or select appropriate values in the fields. Refer to the following table for field descriptions:

Field Name	Description
Sensitive Data Indicator (SDI) Flag	Specifies whether the selected asset is sensitive. Switch **Sensitive Data Indicator (SDI) Flag** to **YES** to mark the asset as sensitive.
Sensitive Data Indicator (SDI) Classification	Specifies the SDI classification of the selected asset. For example, PHI. This list is enabled when **Sensitive Data Indicator (SDI) Flag** is switched to **YES**. For more information on configuring SDI classifications, refer to the Configuring Sensitivity Classifications topic.
Sensitive Data Indicator (SDI) Description	Specifies the description of the SDI classification. For example: Protected Health Information. It is enabled when **Sensitive Data Indicator (SDI) Flag** is switched to **YES**. The field autopopulates based on the SDI classification.
Asset Update Options	Specifies whether sensitivity is applicable to: ▪ **Unclassified only**: Use this option to apply sensitivity to assets that are not marked sensitive. ▪ **All Classified Only**: Use this option to apply sensitivity to assets that are marked sensitive. ▪ **All Classified And Unclassified**: Use this option to apply sensitivity to both the types of assets, sensitive or not sensitive.
Auto Update Sensitivity For	Specifies whether sensitivity is applicable to: ▪ **System(s)**: Switch this option to **Yes** to apply sensitivity to all the systems containing the assets. ▪ **Environment(s)**: Switch this option to **YES** to apply sensitivity to all the environments containing the assets. ▪ **Table(s)**: Switch this option to apply sensitivity to the tables containing the assets.

5. Click **Update**.

   The sensitivity of the assets is updated based on the options you selected.

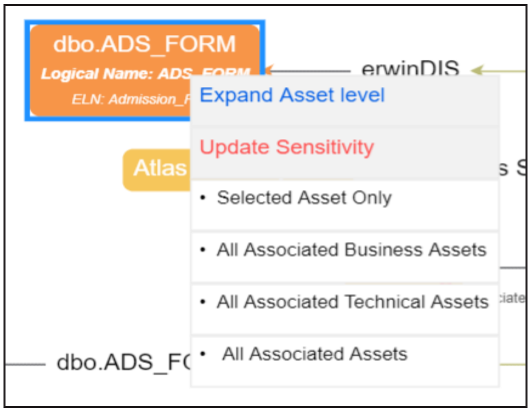
Associated Assets

You can update sensitivity of associated assets in bulk through a mind map.

To update sensitivity of associated assets through mind maps, follow these steps:

1. On the mind map, right-click the required asset.

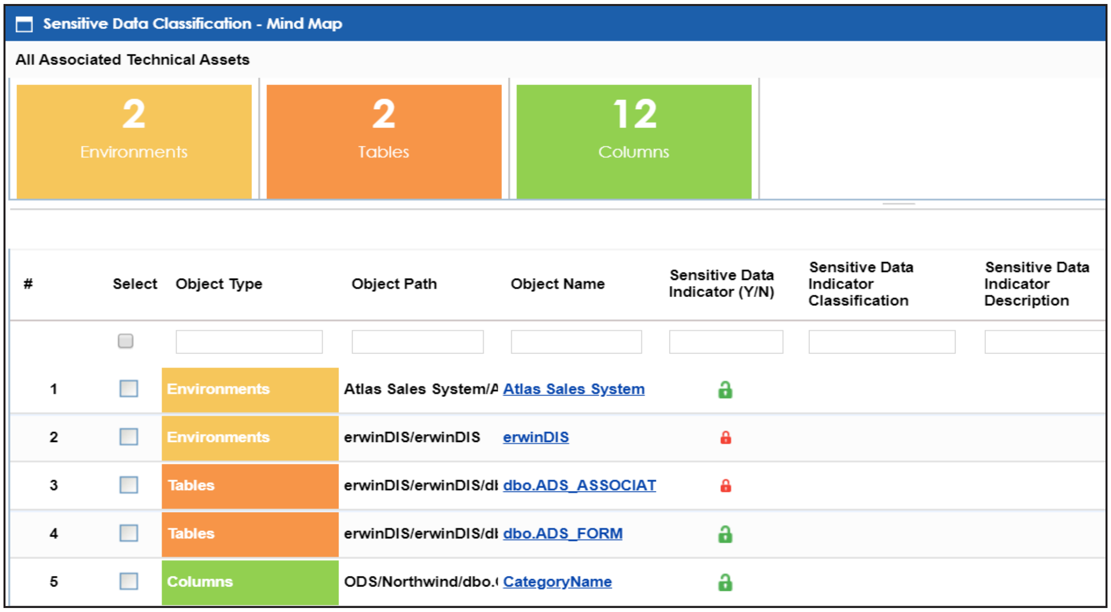
   The options available for the asset appear.

2. Click any one of the following:

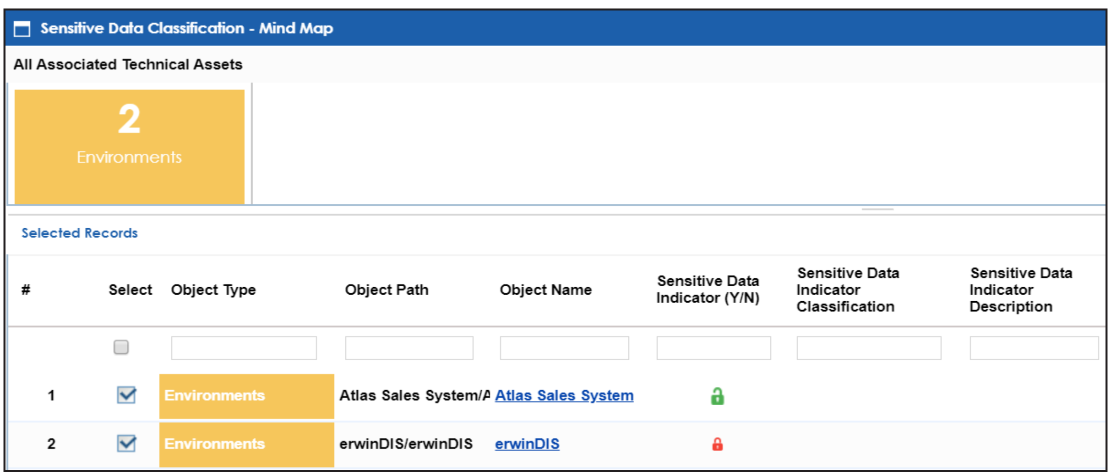
   - **All Associated Business Assets**: Use this option to update sensitivity of associated business assets.
   - **All Associated Technical Assets**: Use this option to update sensitivity of associated technical assets.
   - **All Associated Assets**: Use this option to update sensitivity of associated business and technical assets.

   For example, if you click All Associated Technical Assets, a list of all associated technical assets appear.



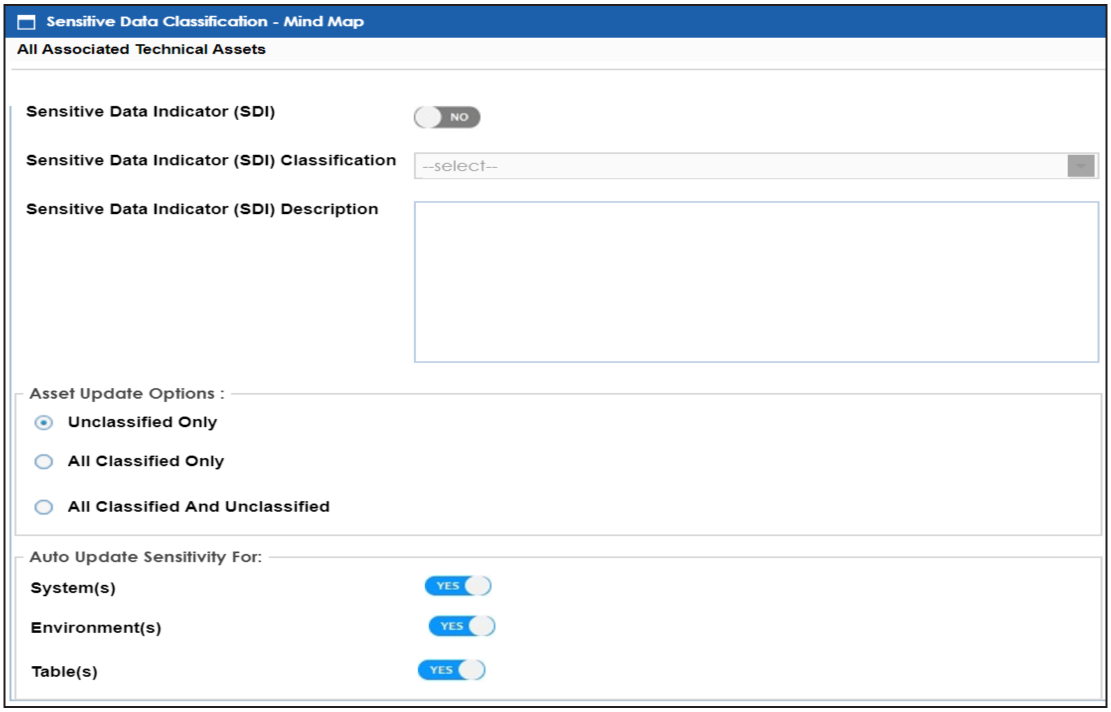
3. Select the required assets and click **Next**.

   The Selected Records page appears. You can verify the selected assets and clear the check box if required.



4. Click **Next**.

   Note: The Auto Update Sensitivity For section does not appear for business assets.



5. Enter or select appropriate values in the fields. Refer to the table above for field descriptions.
6. Click **Update**.

   The sensitivity of the assets is updated based on the options you selected.

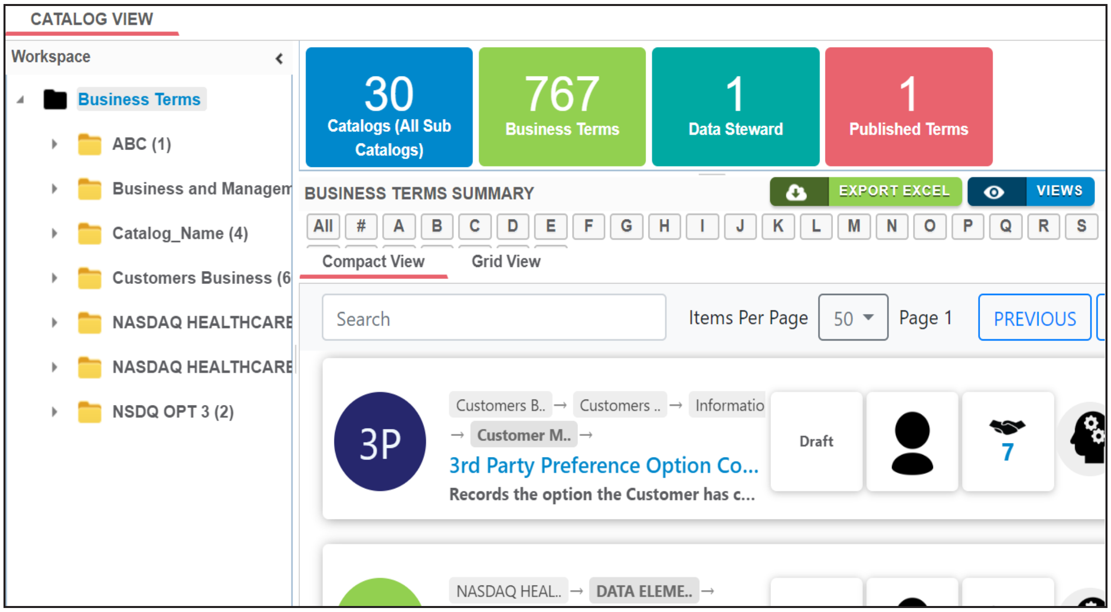
Grid View

You can view list of business assets under the Compact View and Grid View tab. In the Grid View tab, you can update sensitivity of business assets in bulk.

To update sensitivity of business assets, follow these steps:

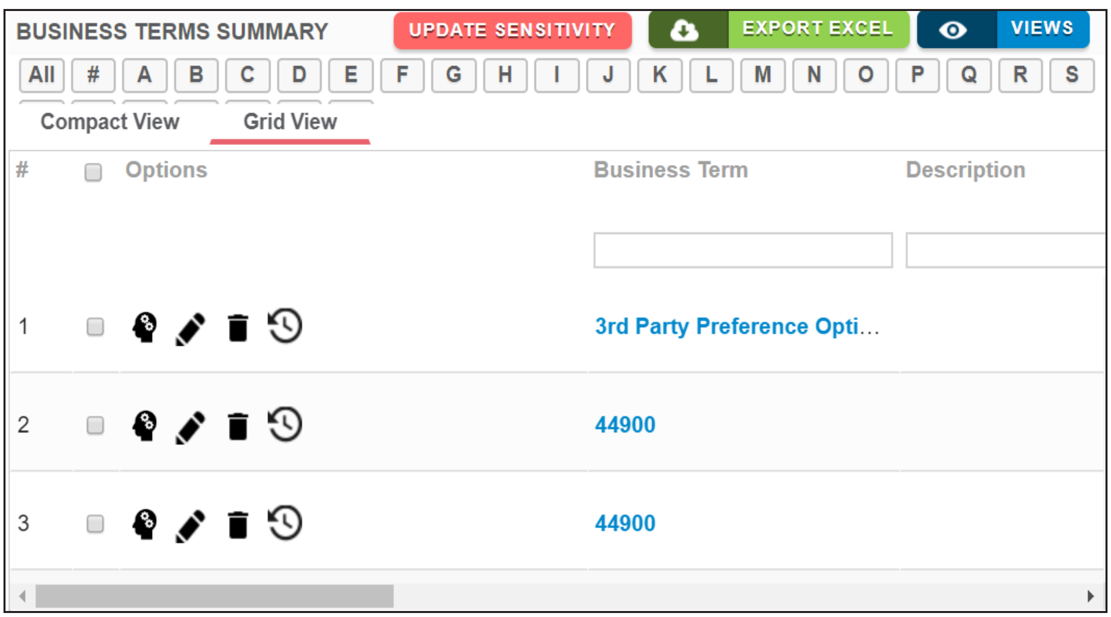
1. In the browser pane, click a <Business_Asset_Name>.

   The Workspace switches to the business assets view. For example, if you click Business Terms in the browser pane, the Workspace switches to the business terms view.



2. Under **<Business_Asset> Summary**, click the **Grid View** tab.

   The grid view for the business asset appears. For example, in the following image the grid view for Business Terms appears.



3. Select the required business assets.

You can use the check box at the top to select all the business assets.

4. Click **Update Sensitivity**.

   The following page appears.

5. Enter or select appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Sensitive Data Indicator (SDI) Flag	Specifies whether the selected assets are sensitive. Switch **Sensitive Data Indicator (SDI) Flag** to **YES** to mark the assets as sensitive.
Sensitive Data Indicator (SDI) Classification	Specifies the SDI classification of the selected assets. For example, PHI. This list is enabled when **Sensitive Data Indicator (SDI) Flag** is switched to **YES**. For more information on configuring SDI classifications, refer to the Configuring Sensitivity Classifications topic.
Sensitive Data Indicator (SDI) Description	Specifies the description of the SDI classification. For example: Protected Health Information. It is enabled when **Sensitive Data Indicator (SDI) Flag** is switched to

Field Name	Description
	YES. The field autopopulates based on the SDI classification.
Asset Update Options	Specifies whether sensitivity is applicable to: ▪ **Unclassified only**: Use this option to apply sensitivity to assets that are not marked sensitive. ▪ **All Classified Only**: Use this option to apply sensitivity to assets that are marked sensitive. ▪ **All Classified And Unclassified**: Use this option to apply sensitivity to both the types of assets, sensitive or not sensitive.

6. Click **Update**.

   The sensitivity of the business assets is updated.

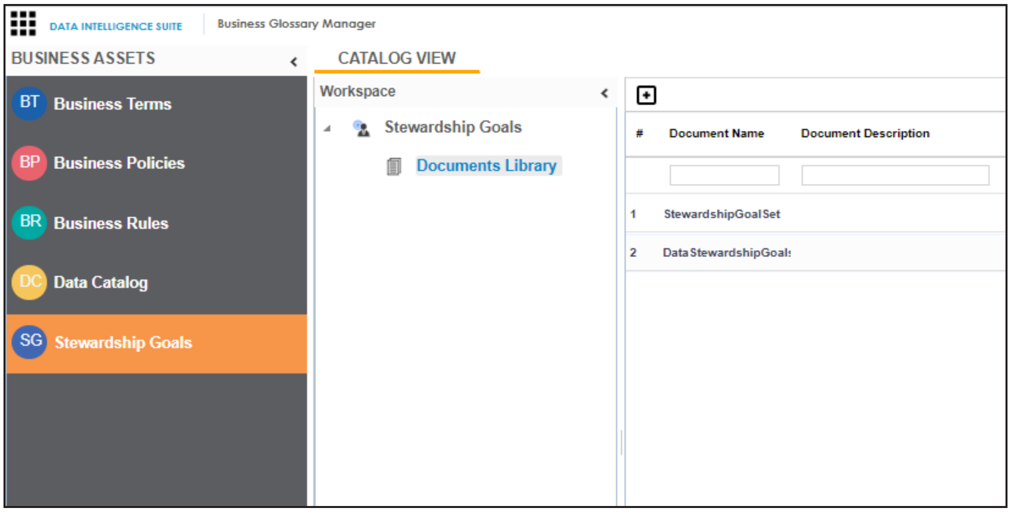
Setting Up Stewardship Goals

Data stewards initiate and facilitate collaboration to use organization's data to its capability. They protect data from misuse and are also responsible for ethical data management. Stewardship goals help data stewards to collaborate and protect data better.

To set up stewardship goals, follow these steps:

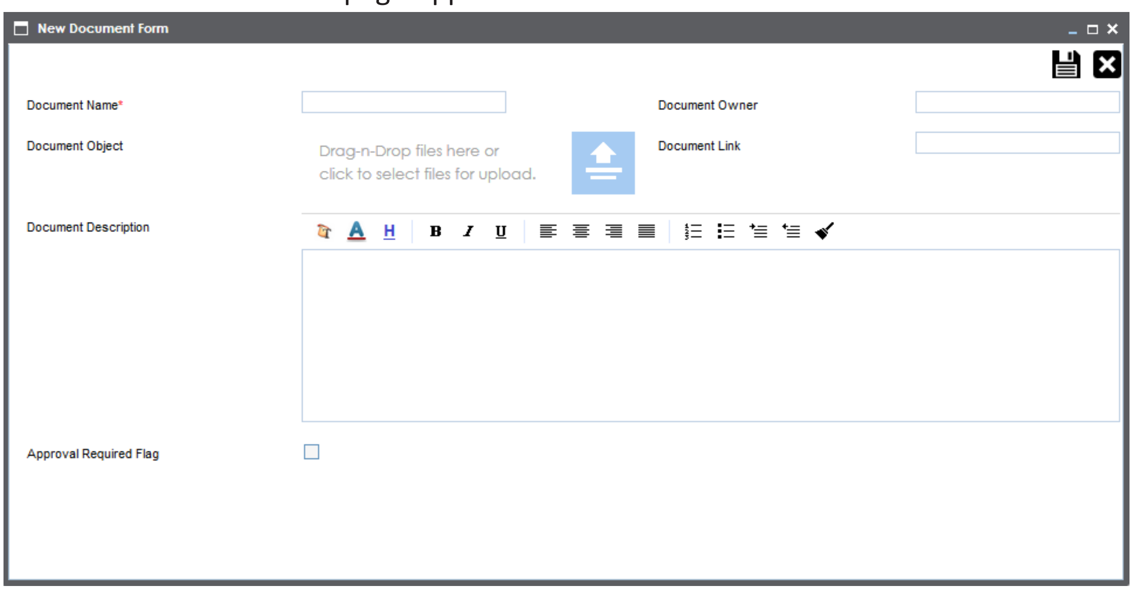
1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.
2. In the browser pane, click **Stewardship Goals**.
   The Workspace switches to the stewardship goals view.

3. In Glossary Workspace, click **Stewardship Goals** > **Documents Library**.



4. Click .

   The New Document Form page appears.



5. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
System Docu-	Specifies the name of the stewardship goals document.

Field Name	Description
ment Name	For example, ABCL Goal Details.
System Document Object	Drag and drop document files or use to select and upload document files.
System Document Owner	Specifies the document owner's name. For example, John Doe.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOnb5YkMBq4ptA7jhg5/view
Intended Use Description	Specifies the intended use of the document. For example: The document is to keep a record of system description and its data dictionary.
Approval Required Flag	Specifies whether the document requires approval. Select the **Approval Required Flag** check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

6. Click .
   The selected stewardship goals document and its description are added to the stewardship goals set.

Once a stewardship goals document is set up, you can manage it using the options available for each goal document. Managing stewardship goals document involves viewing, editing, and deleting it.

Managing Stewardship Goals

Managing stewardship goals document involves viewing, editing, and deleting it.

To manage stewardship goals document, follow these steps:

1. Go to the list of documents in your Documents Library.

#	Document Name	Document Description	Document Owner	Document Status	Document Type	Document
1	StewardshipGoalSet			Ready For Review	pdf	
2	DataStewardshipGoal:			In Progress	pdf	

2. Scroll to the right of the list to access and use the following options:

Preview

Use this option to view the stewardship goals document within the Business Glossary Manager in the preview mode.

Edit

Use this option to update document properties, such as owner, link, description, approval requirement, and status.

Delete

Use this option to delete a document that is no longer required.