erwin Data Intelligence Suite

Business Glossary Management Guide

Release v10.0

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Contents

Managing Business Glossary

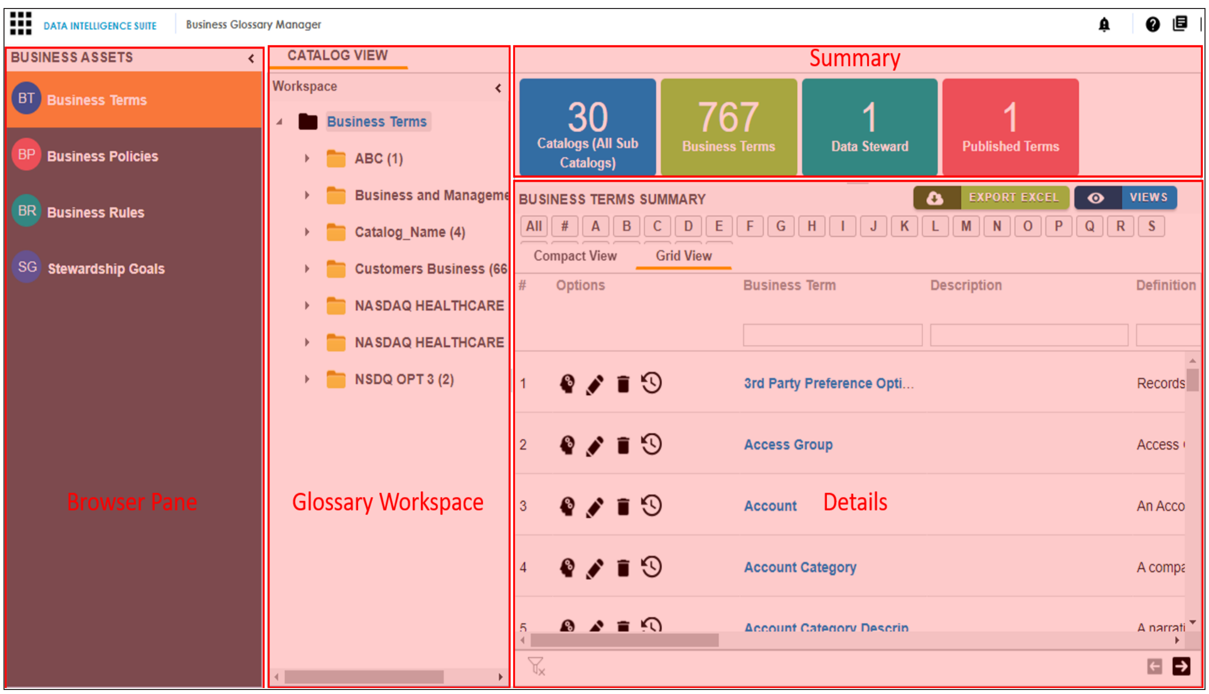
This section walks you through business glossary management. It enables you to manage a common business vocabulary across the organization.

Business Glossary is managed via Business Glossary Manager. It involves creating, managing, and collaborating on common business terms, business policies, and business rules. The 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:



The following table explains the sections of the Business Glossary Manager:

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

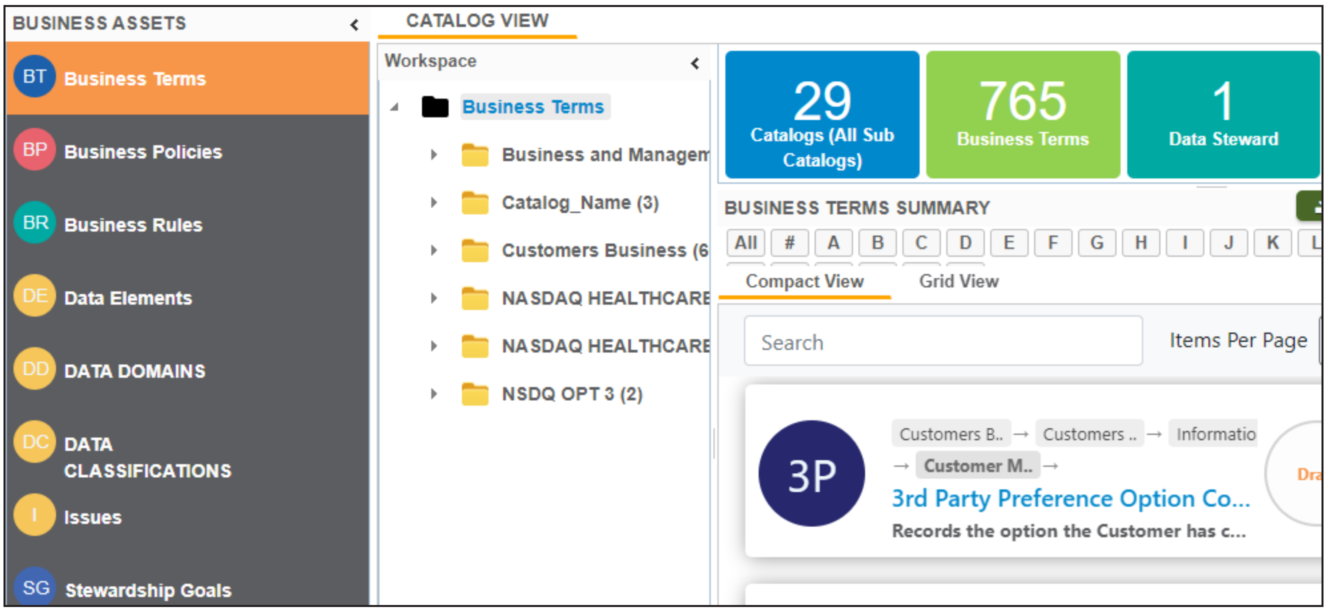
Once, you have created and set up these business glossary objects, you can assign a data steward and set up stewardship goals.

Creating Catalogs

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

To create catalogs, follow these steps:

1. In the browser pane, click the type of glossary object that you want to create.
   For example, Business Term. The Workspace switches to the glossary object view.



2. In the Workspace pane, right-click the top-level glossary object node.
3. Click **New Catalog**.
   The New Catalog page appears.
4. Enter Catalog Name and Catalog Description.

   For example:

   - Catalog Name - Customers Business
   - Catalog Description - The catalog contains business terms of the organization.

5. Click .
   A catalog is created and added to the catalog tree.

Once a catalog has been 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 workflow

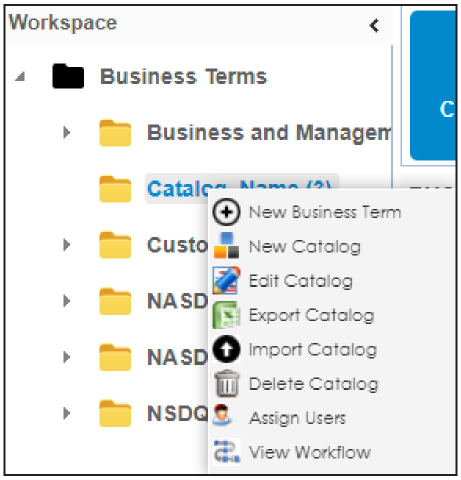
Managing Catalogs

Managing catalogs involves:

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

To manage catalogs, follow these steps:

1. Right-click a catalog to view catalog management options.
   The following image uses a Business Term catalog for example.



2. Use the following options:

New Catalog

You can create a sub-catalog to categorize glossary objects further.

Edit Catalog

You can edit the catalog to change its name or update its description.

Import Catalog

You can import an existing catalog. Select the catalog file from the location where you saved it and click .

Export Catalog

You can export a catalog to a .xls file. You can later import this file to your glossary workspace.

Delete Catalog

You can delete a catalog that is no longer required. All the glossary objects in the catalog are deleted when you delete it.

Assign Users

You can assign users to a catalog based on your organization's projects, departments, functions, and so on.

View Workflow

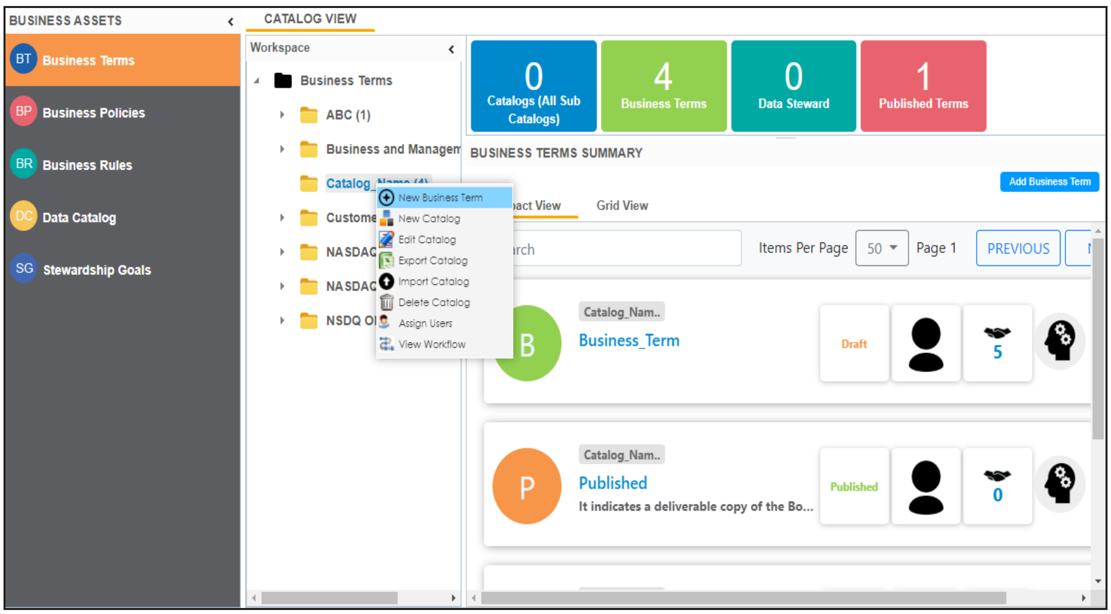
You can view the workflow assigned to the catalog. The workflow displays all the stages/actions, users, and roles involved. Also, it shows the flow of information and action across all the stages.

Creating Business Terms

Business terms are globally-defined terms that represent your business terminology usage. They enable you to maintain a common 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.

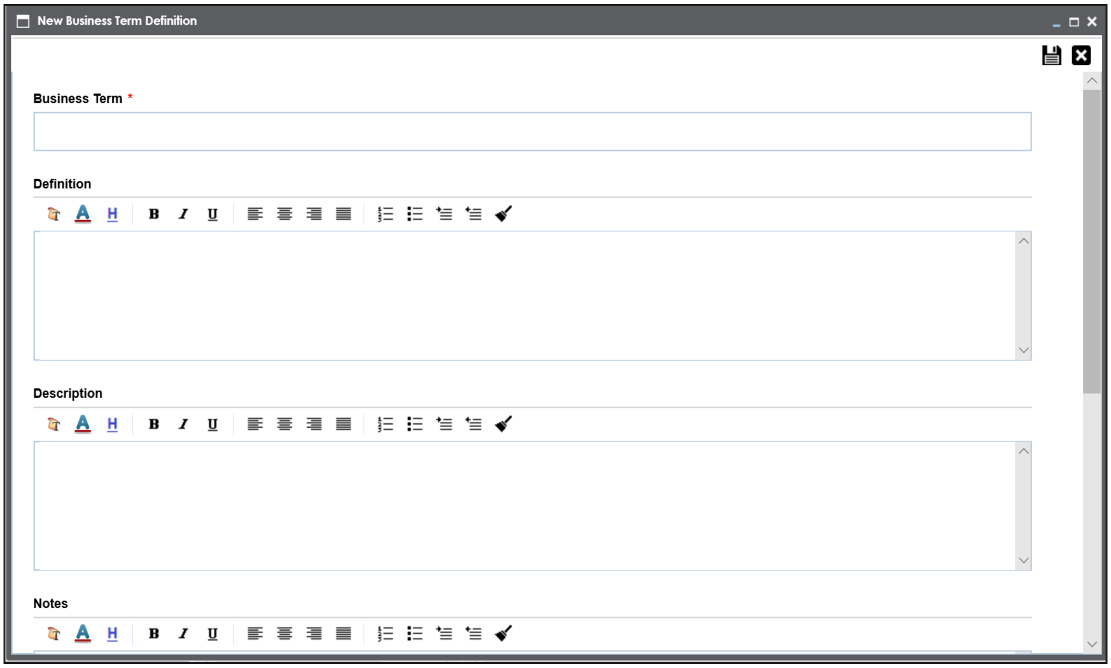
To create business terms, follow these steps:

1. In the browser pane, click **Business Terms**.
   The Workspace switches to the business terms view.
2. In Workspace, under the **Business Terms** node, right-click a catalog node.



3. Click **New Business Term**.

   The New Business Term Definition page appears.



4. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory.

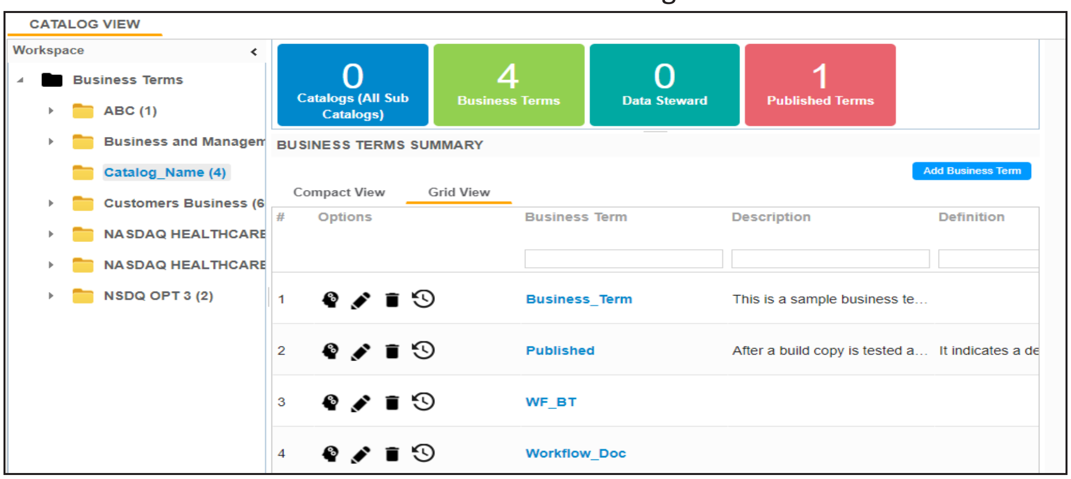
   Refer to the following table for field descriptions.

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

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

5. 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 Business Glossary Workflow topic in the Managing Workflows tutorial.

Once the business term has been added to a catalog, you can enrich it further by:

- Defining associations
- Setting up additional details
- Attaching rich media

- Setting up collaborations
- Viewing workflow logs
- Assigning valid values

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

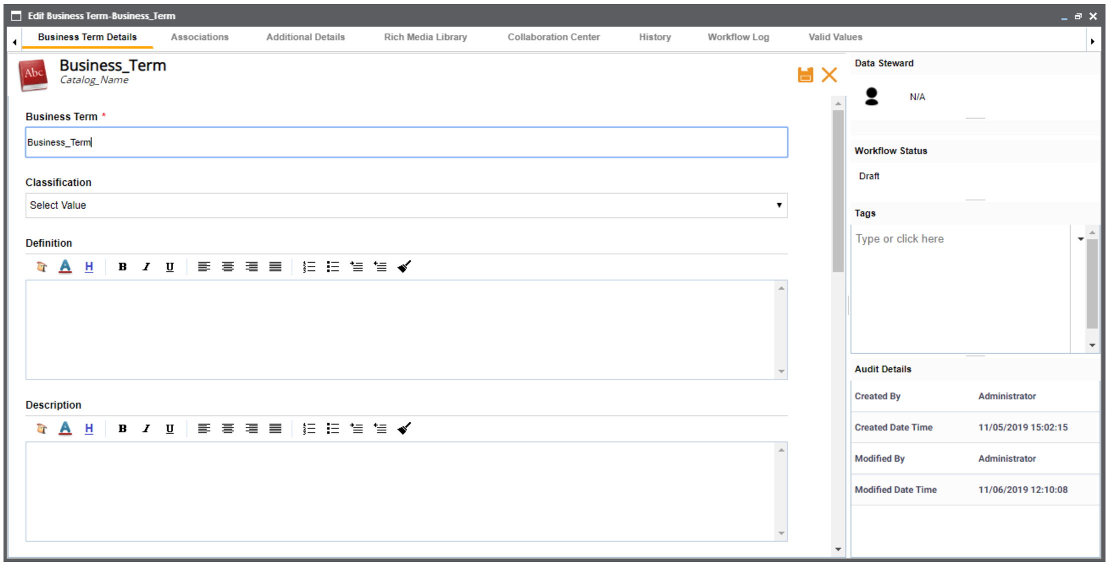
- Editing or deleting business terms
- Viewing mind maps
- Exporting business terms
- Viewing history

Defining Associations for Business Terms

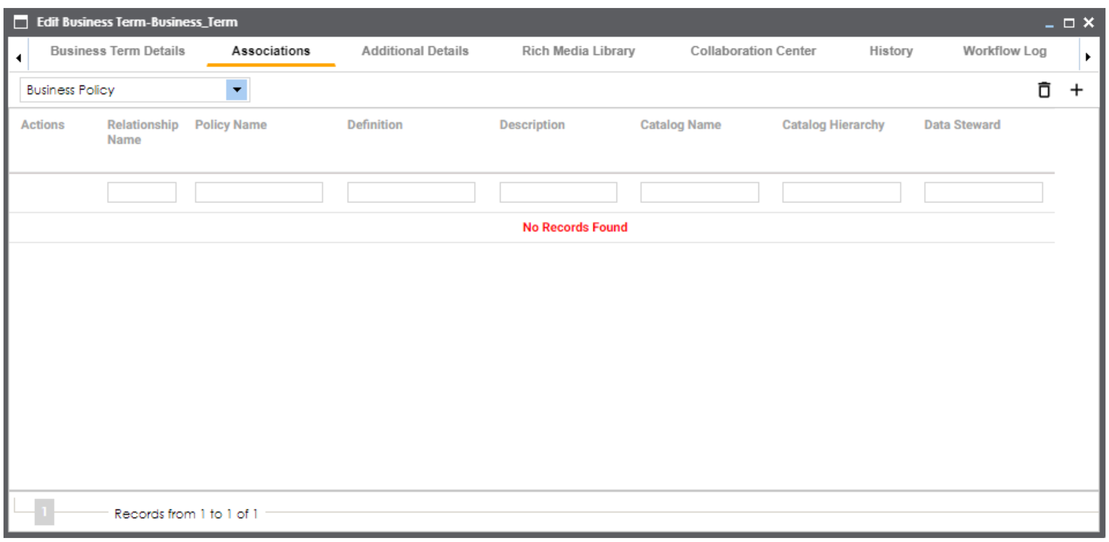
By default, you can associate business terms with business policies, other business terms, columns, environments, and tables. You can control the glossary object types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

To define associations for business terms, follow these steps:

1. In the list of business terms, under the options column, click ✎ to edit a business term.
   The business term opens in edit mode.

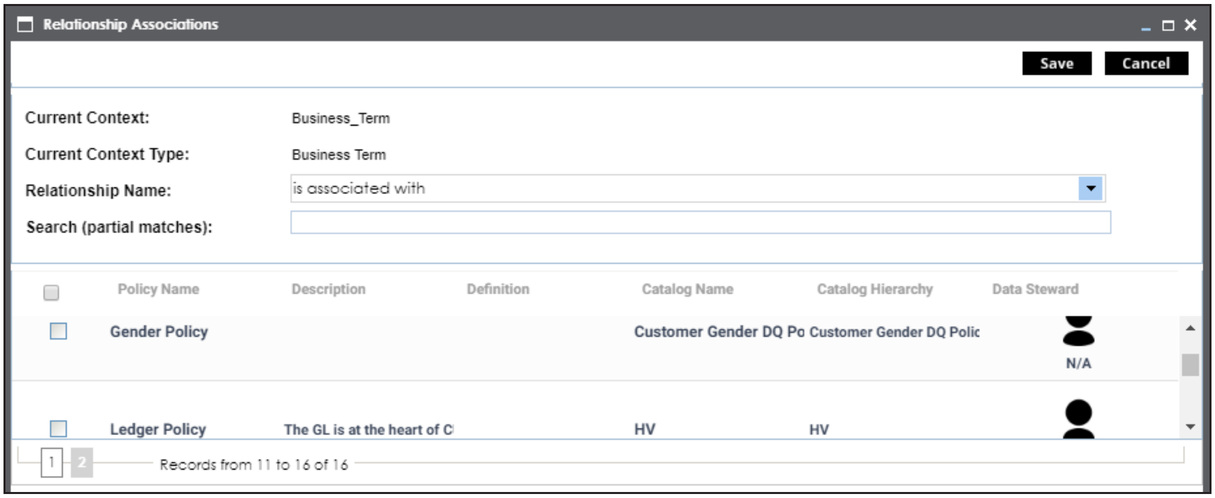


2. Go to the **Associations** tab.



3. In the object type (business policies, business terms, columns, environments, and tables) list, select the object type that you want to associate with the business term.
4. Click +.

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



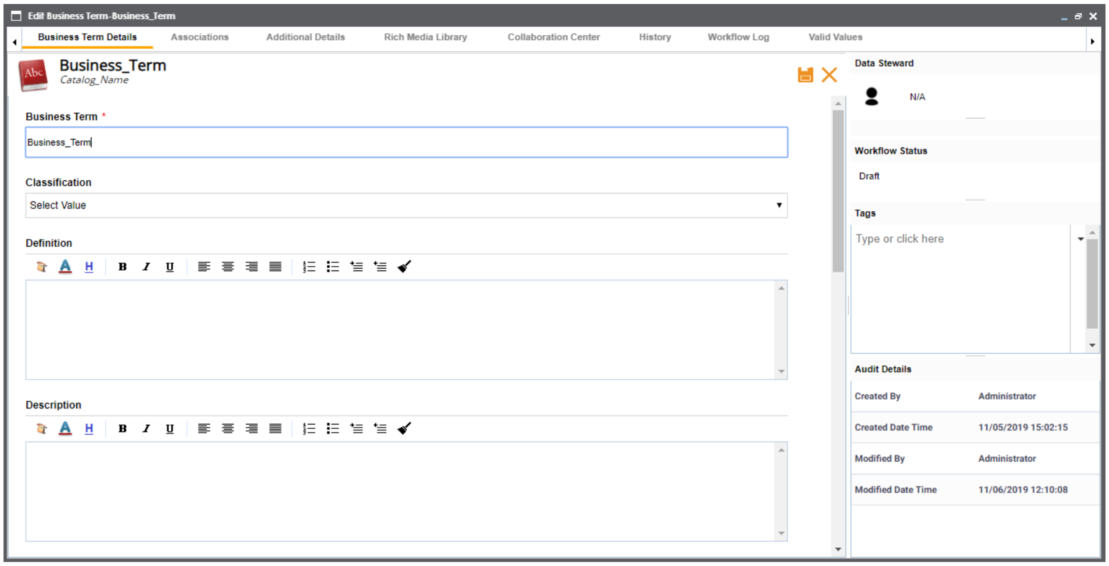
5. From the list, select the objects that you want to associate to your business term.
   If you know the object name, use the Search (partial matches) field to look up for it.
6. Click **Save**.
   The selected objects are associated to the business term and added to the list of associations for an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

Setting Up Additional Details

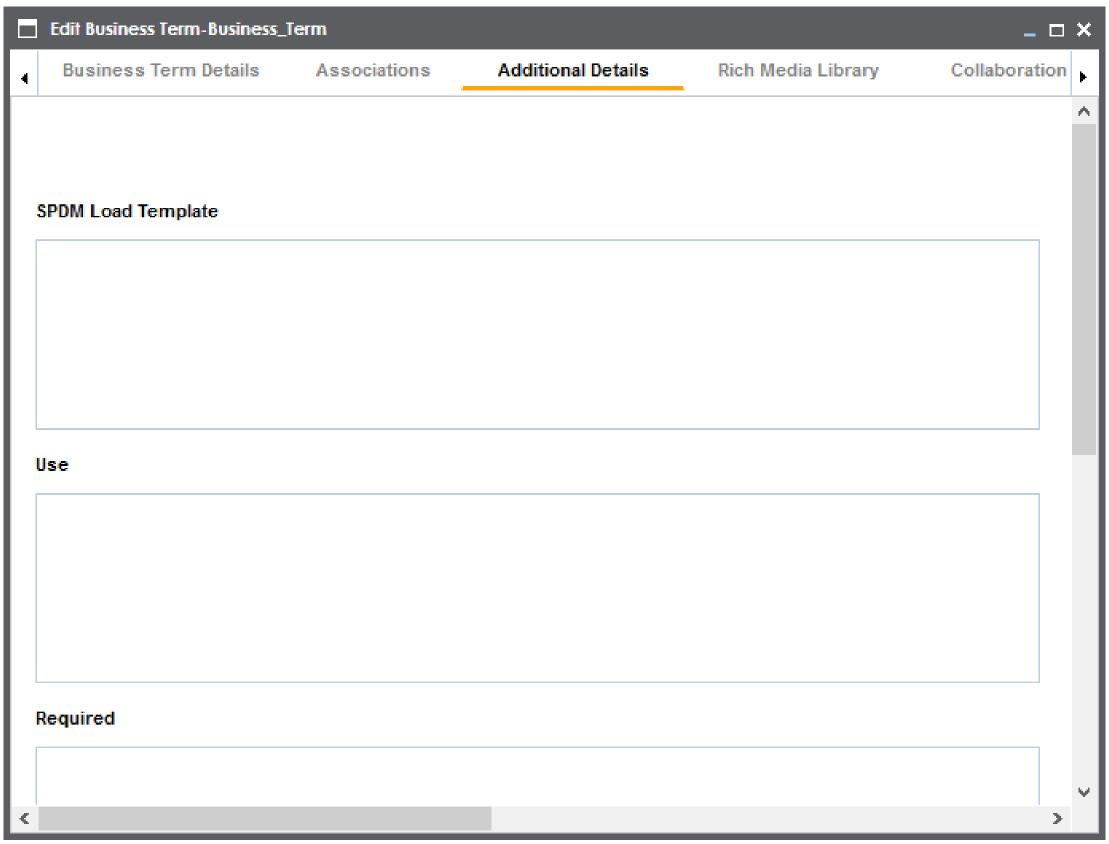
You can set up custom additional information about a business term. This information enables you to add more context to a business term.

To set up additional information, follow these steps:

1. In the list of business terms, under the options column, click to edit a business term.
   The business term opens in edit mode.



2. Go to the **Additional Details** tab and click .



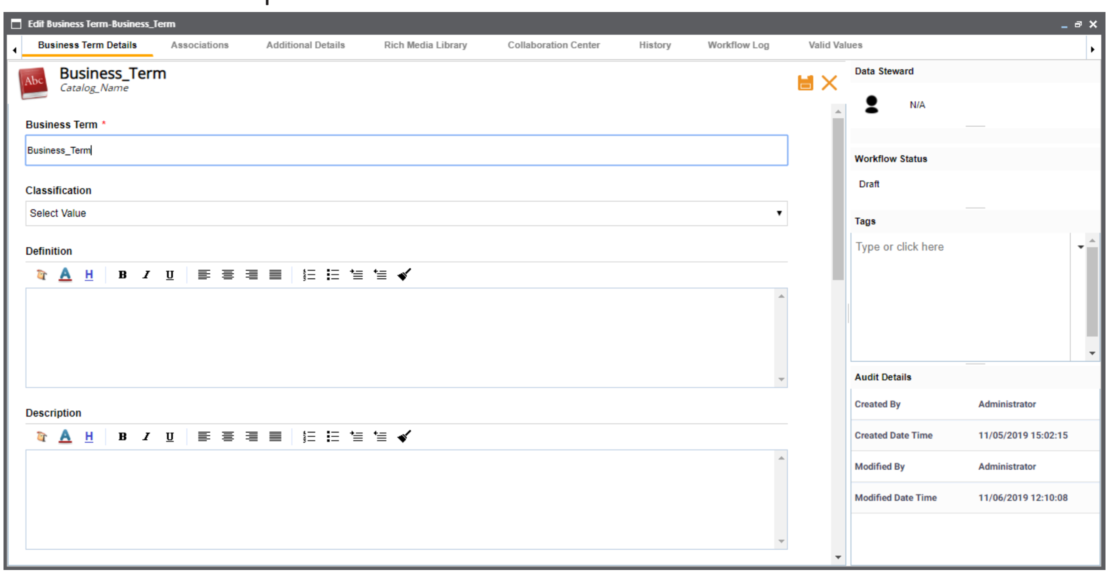
3. Add information to the available fields.
4. Click .
   The information you entered is added to the business term.

Attaching Rich Media

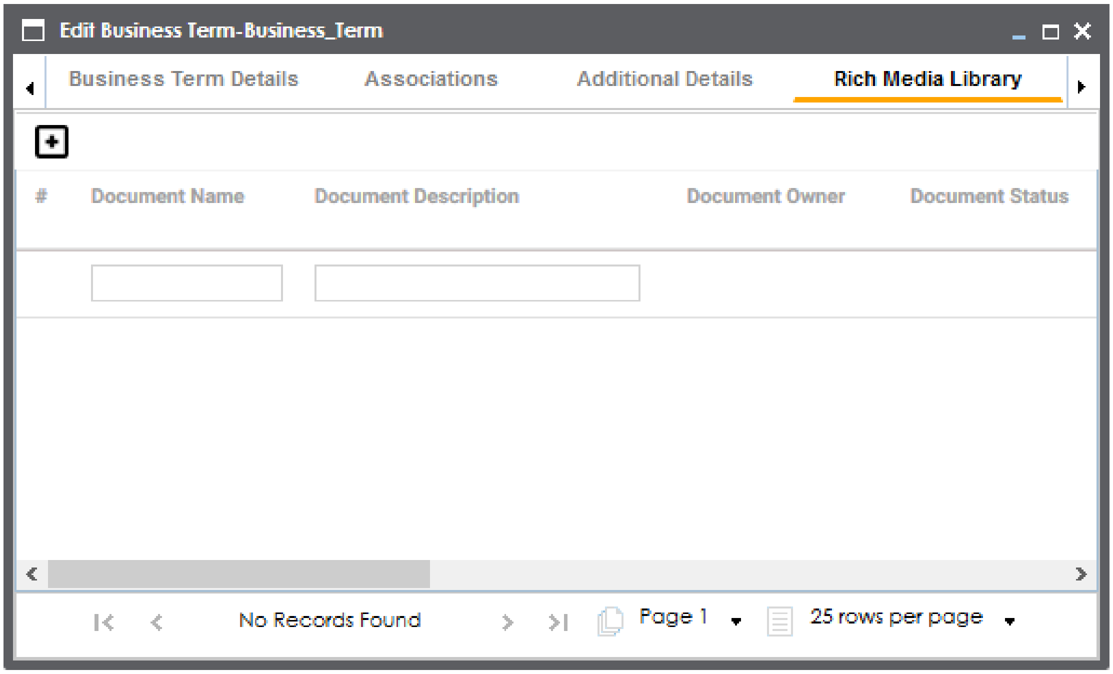
You can add supporting artifacts, such as text files, audio files, video files, and so on to a business term.

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

1. In the list of business terms, under the options column, click to edit a business term.
   The business term opens in edit mode.

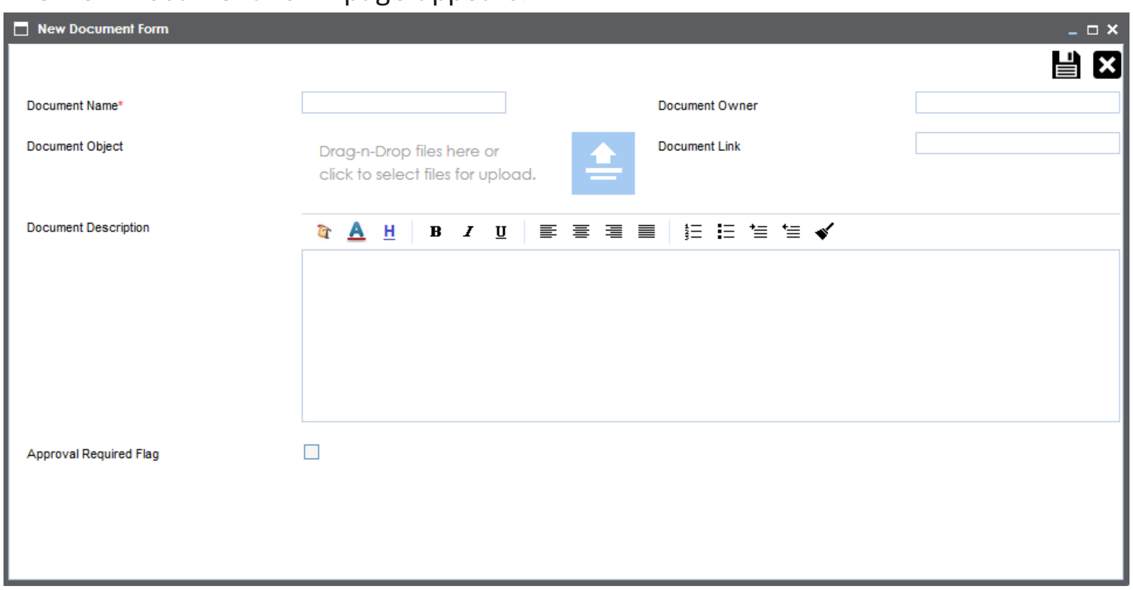


2. Go to the **Rich Media Library** tab.



3. Click .

The New Document Form page appears.



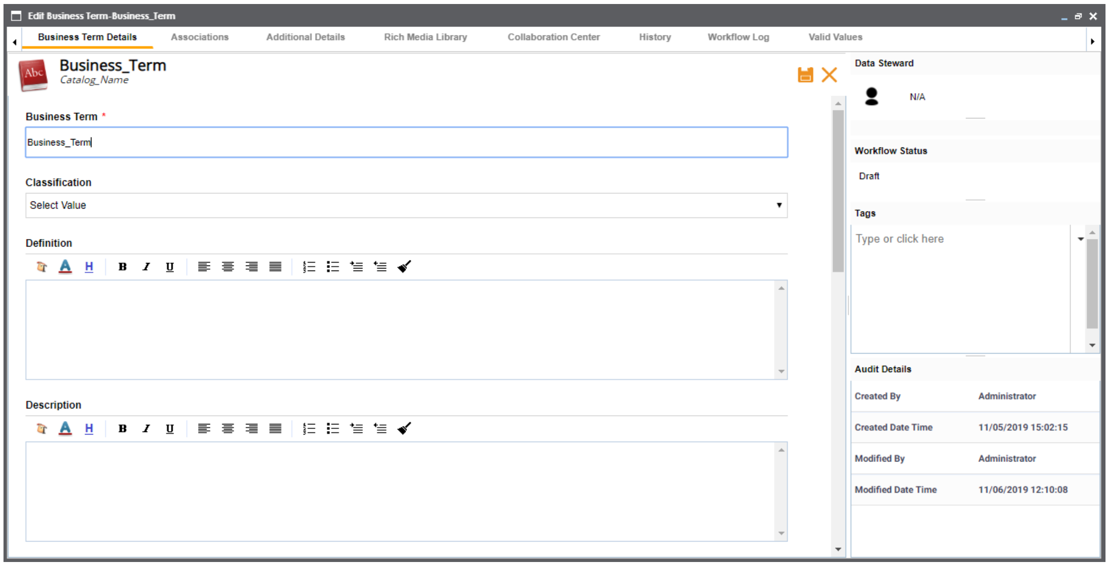
4. Enter a Document Name. Also, enter values to the other fields on the page.
   - Select the **Approval Required Flag** check box if you want to send the rich media file for approval. This enables the Document Status drop down list. Select the appropriate status.
5. Drag and drop the rich media file to the Document Object area or click to browse and add a rich media file.
6. Click .
   The selected rich media file and its description are attached to the business term or sent for approval if you selected the Approval Required Flag check box.

Setting Up Collaborations

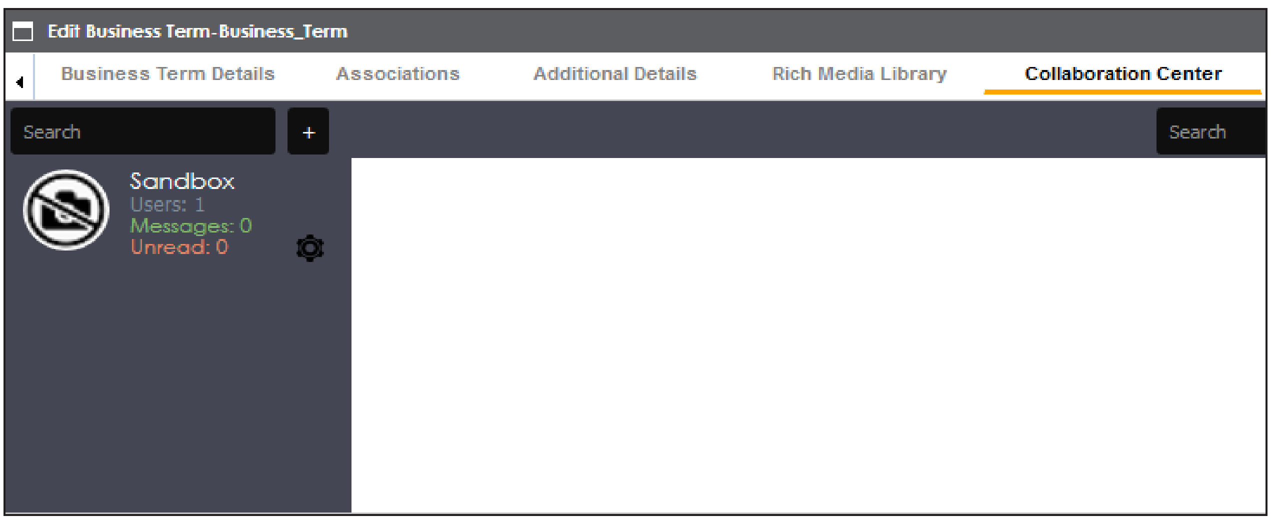
You can start discussions on business glossary objects or a relevant topic with your team using the Collaboration Center. This enables you and your team to work together.

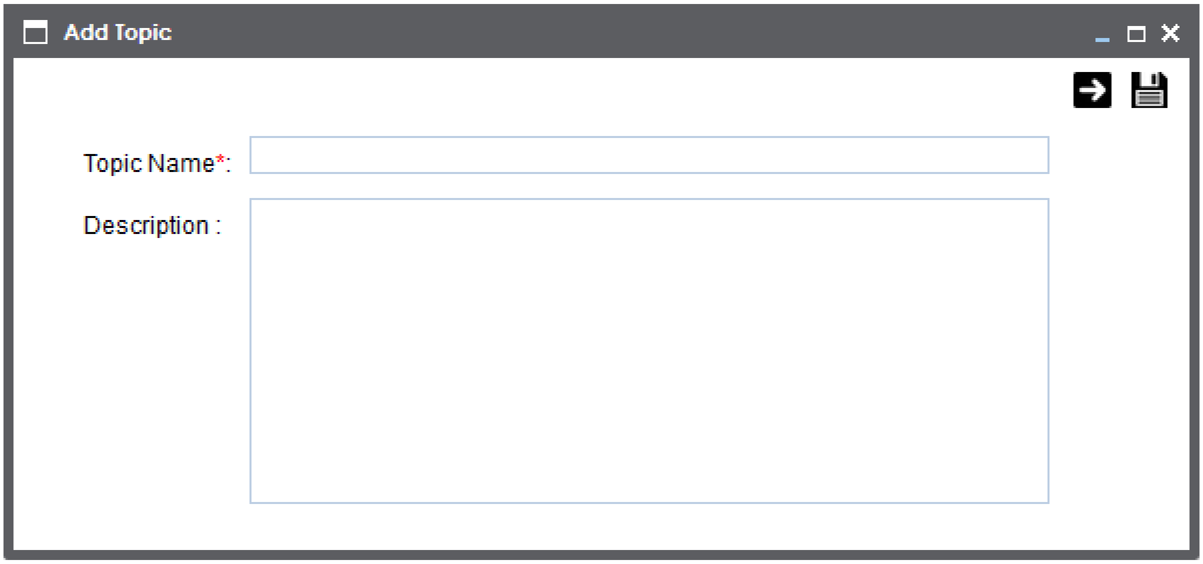
To start discussions with other users or your team, follow these steps:

1. In the list of business terms, under the options column, click to edit a business term.
   The business term opens in edit mode.



2. Go to the **Collaboration Center** tab.



3. Click .
   The Add Topic page appears.
   

4. Type the topic name and add a relevant 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 all 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

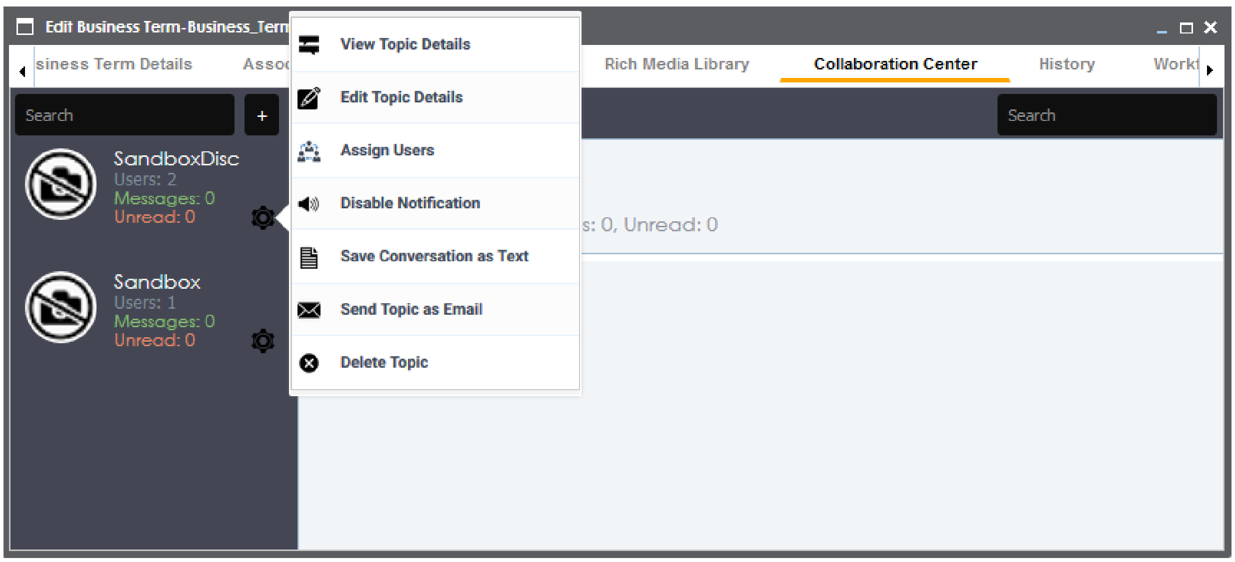
Managing Topics

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. Go to the **Collaboration Center**.
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

You can take a look at the topic and its information, such as the creator, the cre-ation date and time, and the modification date and time.

Edit Topic Details

You can edit the topic name and description to enrich it further.

Assign Users

You can assign multiple users to collaborate with you and contribute to the topic.

Disable Notification

You can choose whether you are notified whenever the topic is updated.

Save Conversation as Text

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

Send Topic as Email

You can 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

You can delete a topic that is no longer required.

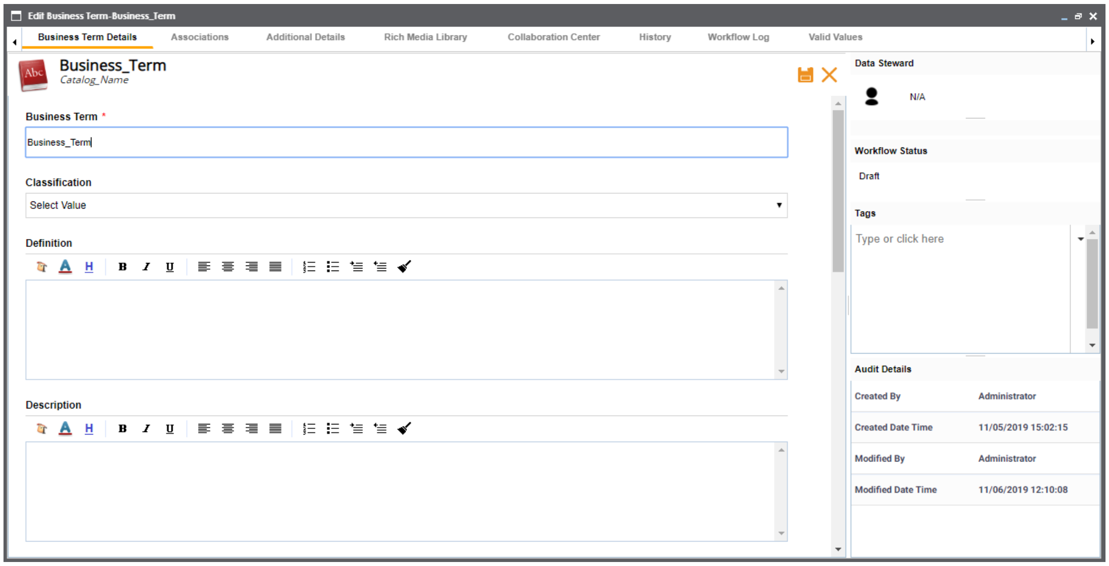
Viewing Workflow Logs

You can view the flow of actions of the workflow assigned to a business term. The workflow log enables you to view the current state of the business term in the workflow.

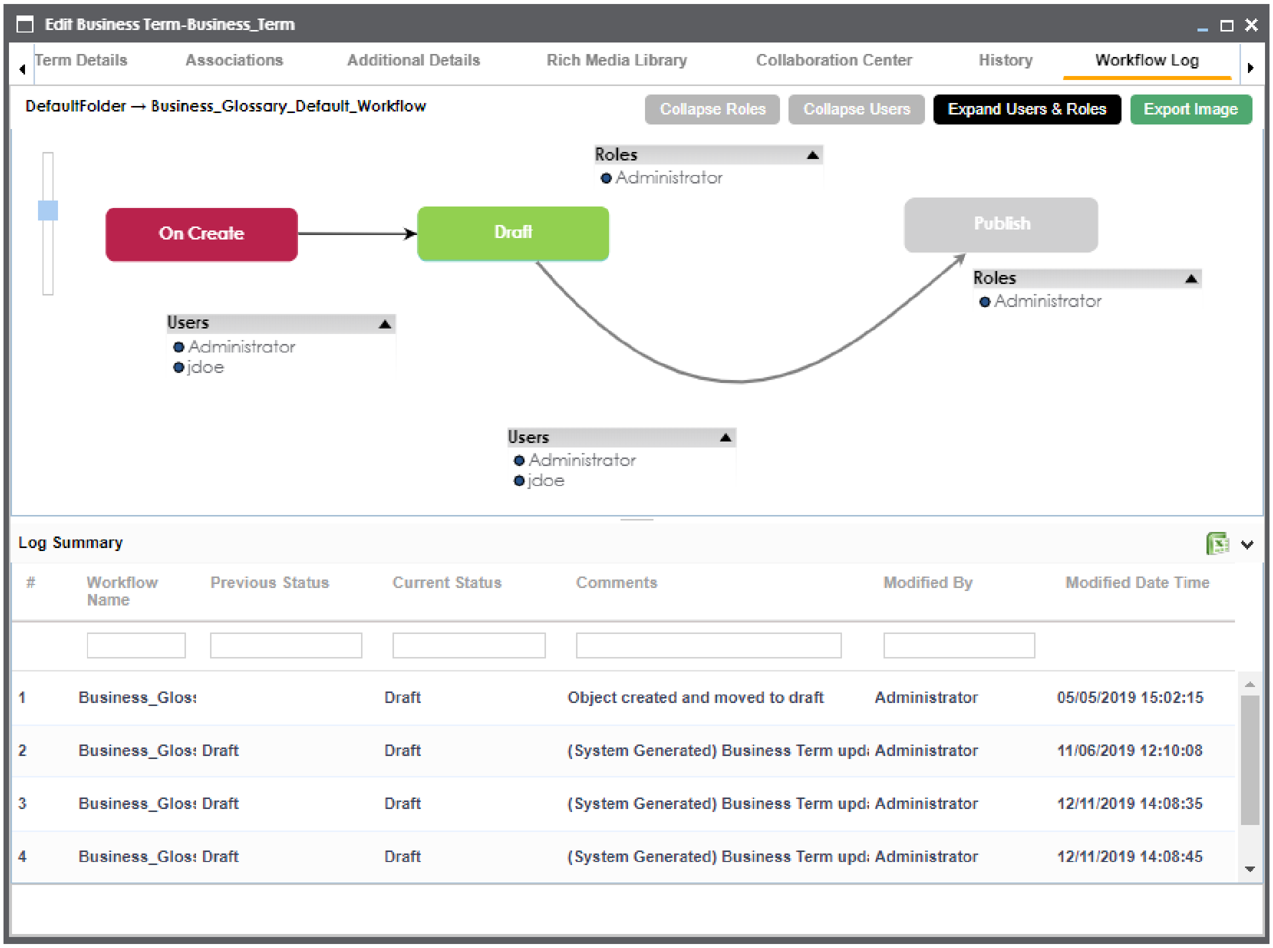
To view workflow log, follow these steps:

1. In the list of business terms, under the options column, click to edit a business term.

The business term opens in edit mode.



2. Go to the **Workflow Log** tab.



The following information is displayed:

- Workflow with all the stages in the flow, users, and roles are displayed in the upper pane.
- Current state of business term is highlighted in the workflow.
- Log of the actions performed is displayed in the lower pane.

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

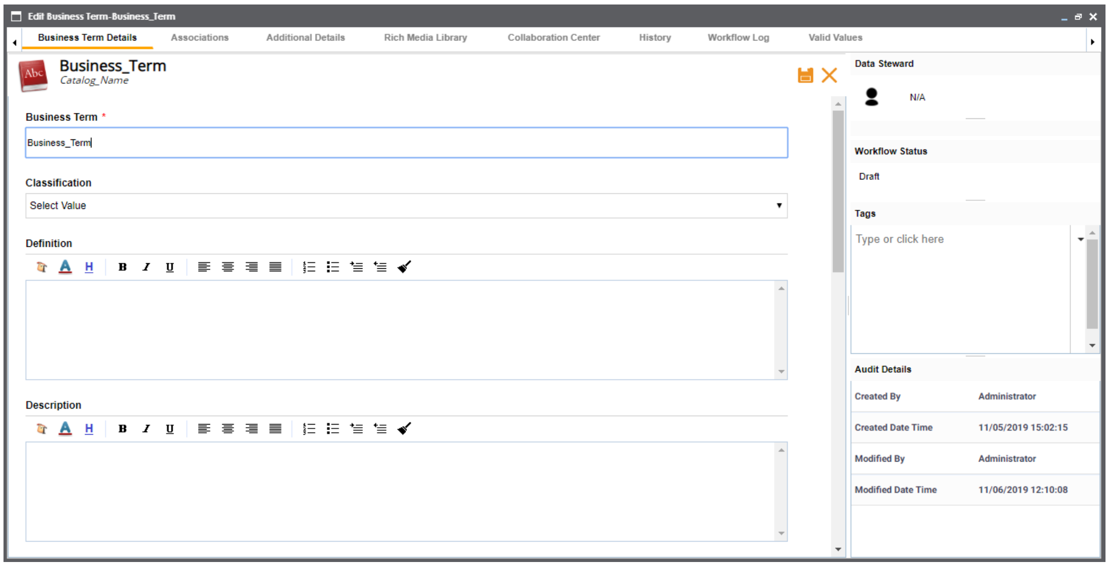
Assigning Valid Values

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

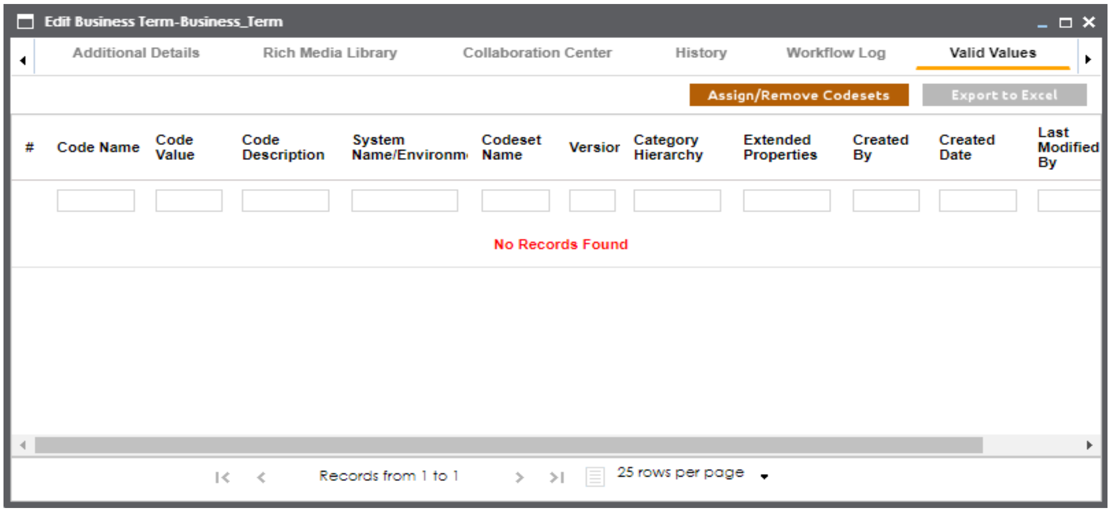
To assign valid values, follow these steps:

1. In the list of business terms, under the options column, click to edit a business term.

   The business term opens in edit mode.



2. Go to the **Valid Values** tab.



3. Click **Assign/Remove Codesets**.
   The Published Codesets page appears.
4. Select the codesets that you want to associate to the business term.
5. Click **Save**.
   The selected codesets are associated to the business term and are added to the Valid Values list. To export the valid values list, click **Export to Excel**.

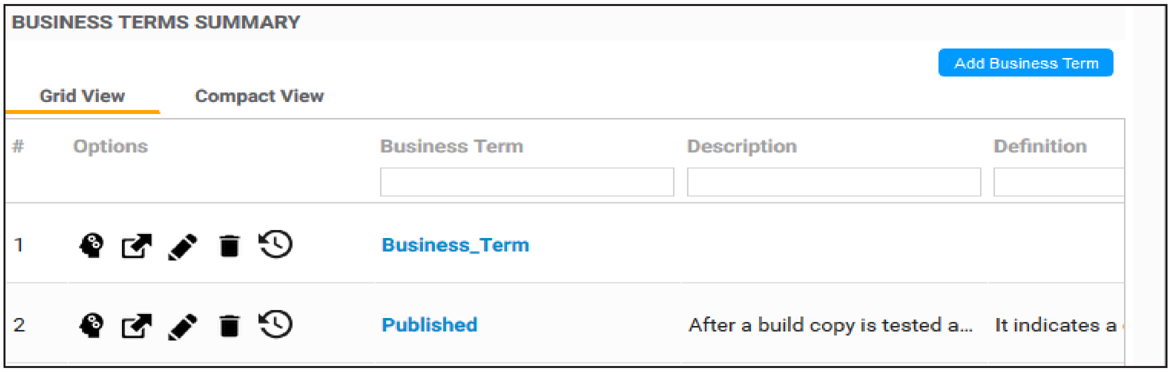
Managing Business Terms

Managing business terms involves:

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

To manage business terms, follow these steps:

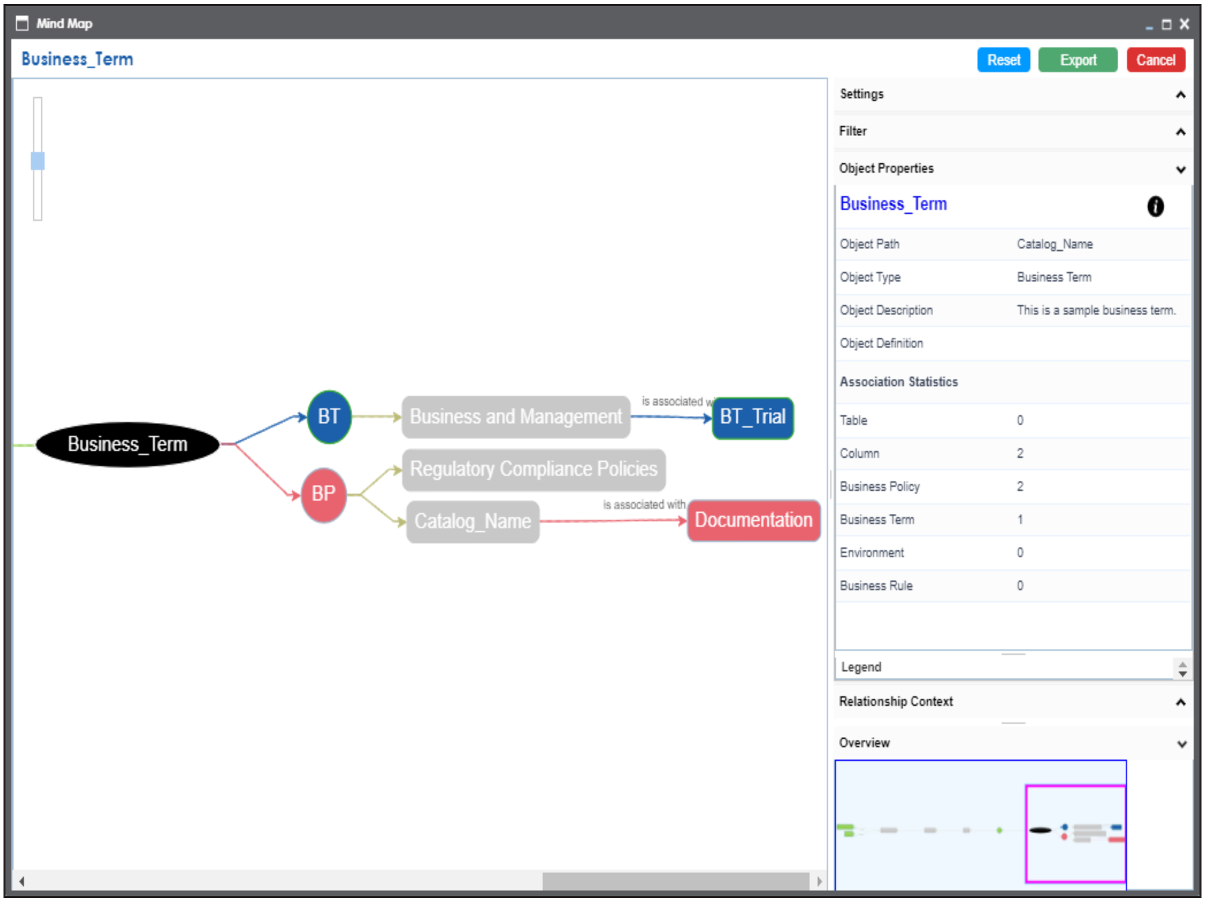
1. Go to the list of business terms in your catalog.



2. Use the following options:

View Mind Map ( )

A mind map displays the pictorial representation of the business term, its associations, status, data steward, and so on.



Use the following options to work on the mind map:

Expand (+) : To drill the mind map further, hover on a node and click the plus (+) icon or right-click a node and the click **Expand Object Level**.

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

Filter: To filter the components of the mind map based on the asset type or relationship, expand the Filter section and select the appropriate filter criteria.

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.

Relationship Context: To view information about a relationship in the mind map, select the relationship line in the diagram. The Relationship Context section displays information about the selected relationship.

Edit Business Term ()

You can enrich a business term by defining associations, attaching rich media, and so on.

Delete Business Term ()

You can delete a business term that is no longer required.

View History ()

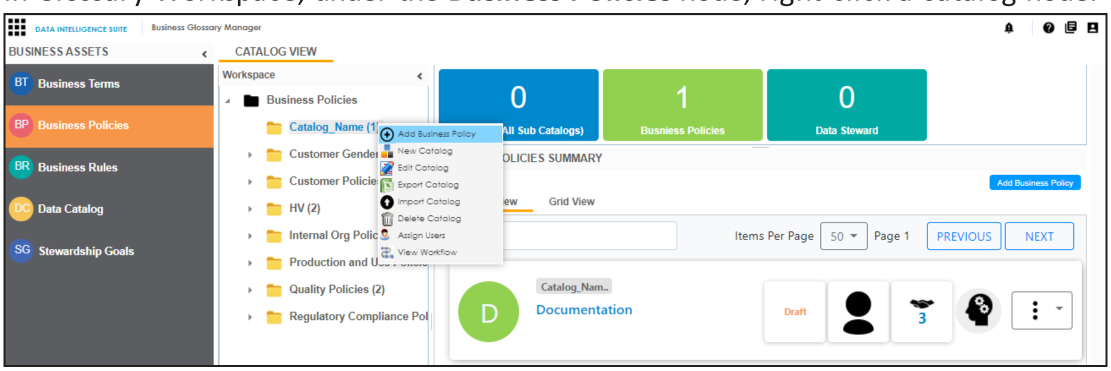
You can view all the actions performed on a business term since it was created. Alternately, on the Edit Business Term page, go to the History tab.

Creating Business Policies

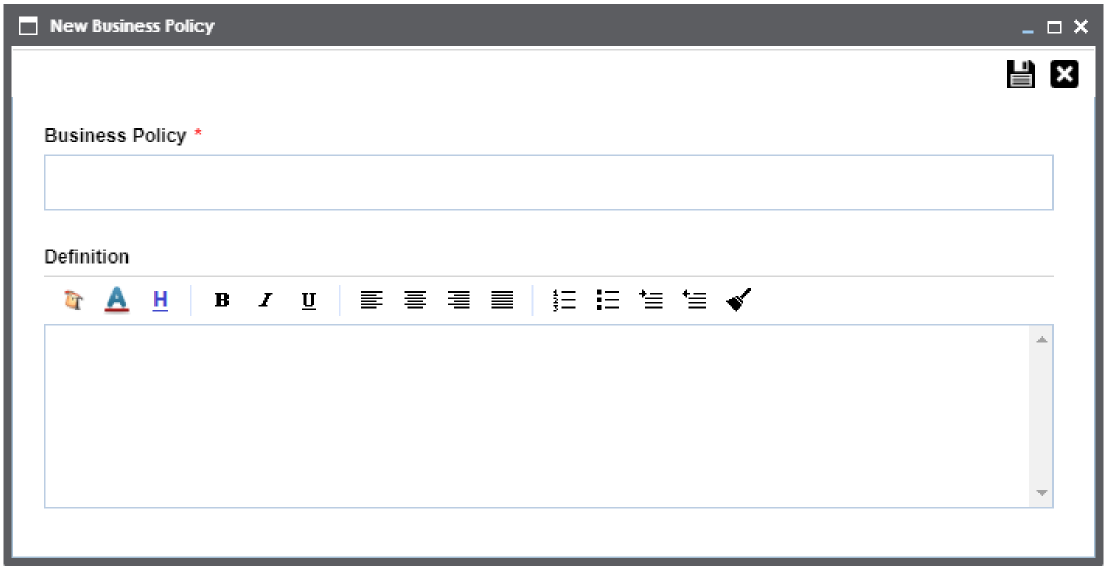
Business policies are globally-defined set of enterprise-level principles. They enable you to maintain business standards across your organization. You can create business policies in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

To create business policies, follow these steps:

1. In the browser pane, click **Business Policies**.
   The Glossary Workspace switches to the business policies view.
2. In Glossary Workspace, under the **Business Policies** node, right-click a catalog node.



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



4. Enter Business Policy name and Definition. Fields marked with a red asterisk are mandatory.

   For example:

   - Business Policy - Change of Address
   - Definition - This policy documents the rules for change of customer's address.

5. Click .
   A business policy is created and added to the catalog.

Once the business policy has been added, you can enrich it further by:

- Defining associations
- Setting up additional information
- Attaching 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

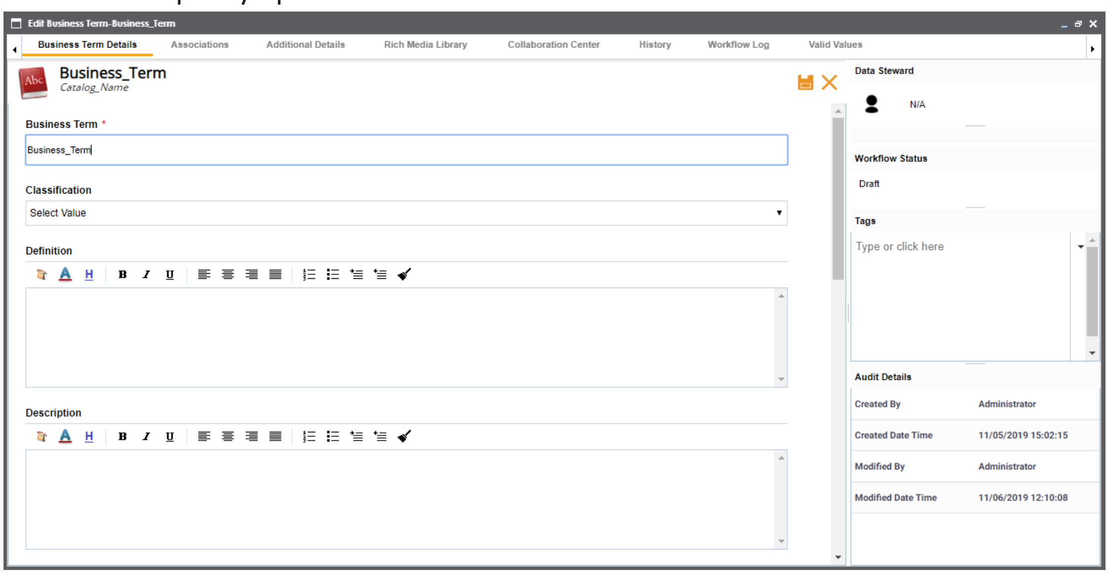
Defining Associations for Business Policies

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

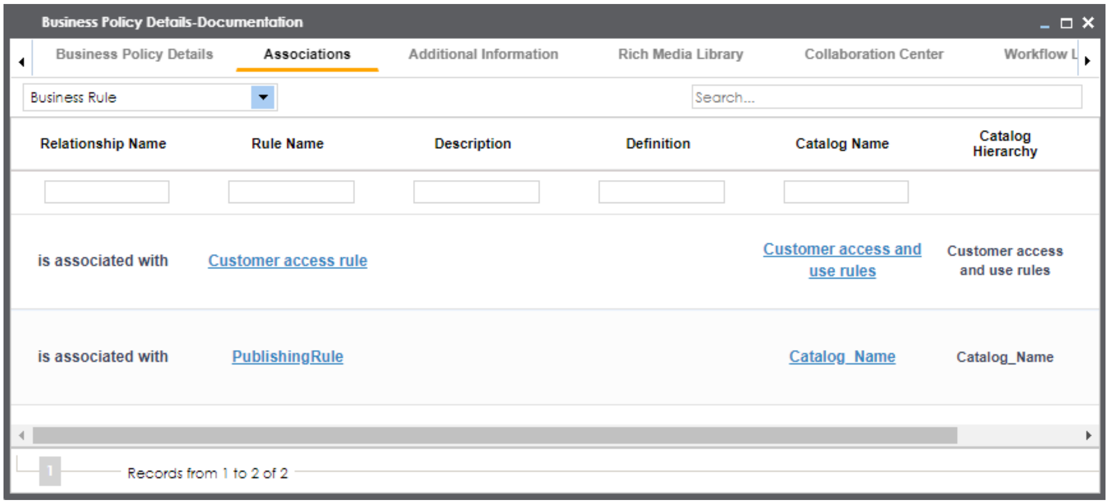
To define associations for business policies, follow these steps:

1. In the list of business policies, under the options column, click to edit a business policy.

   The business policy opens in edit mode.

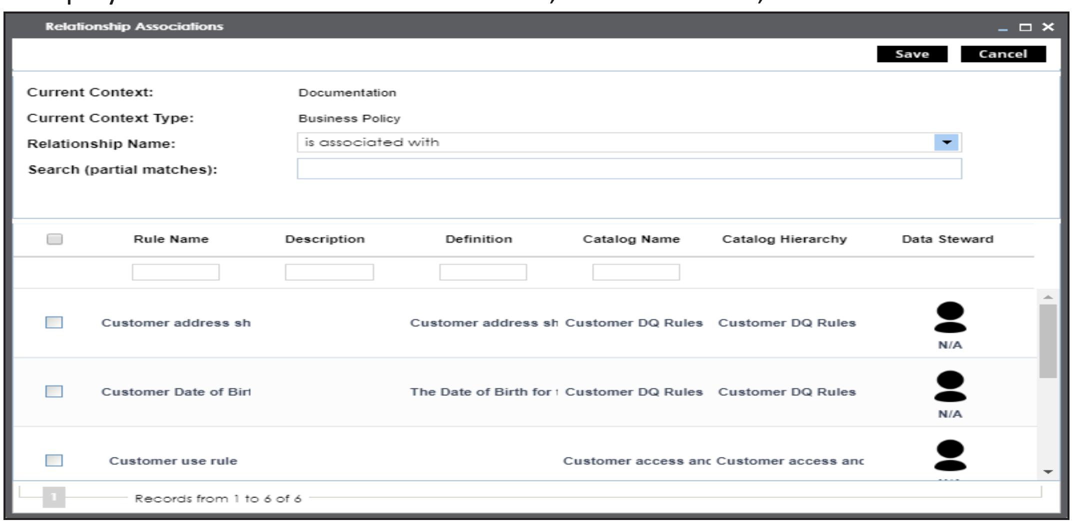


2. Go to the **Associations** tab.



3. In the object type (business rules, business terms, and columns) list, select the object type that you want to associate with the business policy.

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



5. From the list, select the objects that you want to associate to your business policy.
   If you know the object name, use the Search (partial matches) field to look up for it.

6. Click **Save**.
   The selected objects are associated to the business policy and added to the list of

associations for an object type.

You can define as many associations as required.

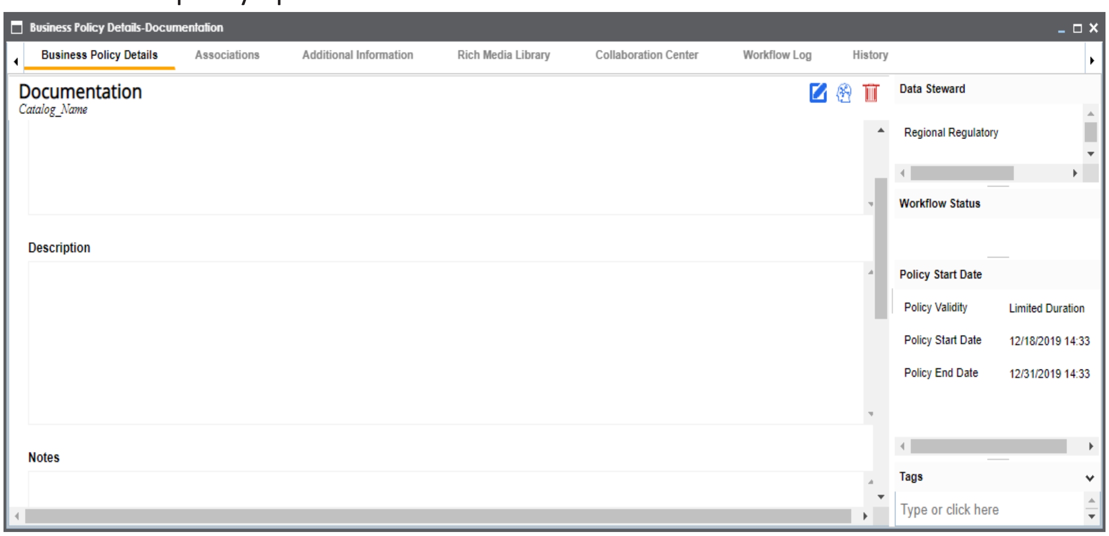
Setting Up Additional Details

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

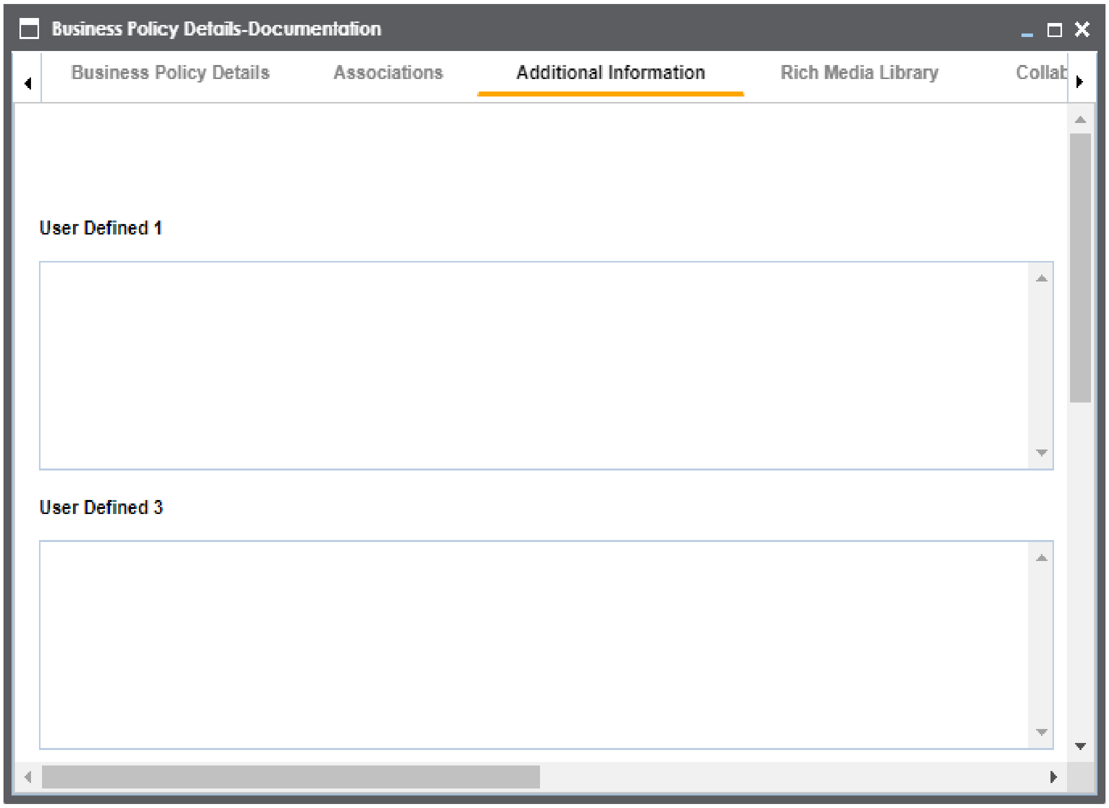
To set up additional information, follow these steps:

1. In the list of business policies, under the options column, click  to edit a business policy.

   The business policy opens in edit mode.



2. Go to the **Additional Information** tab and click .



3. Add information to the available fields.

4. Click .

   The information you entered is added to the business policy.

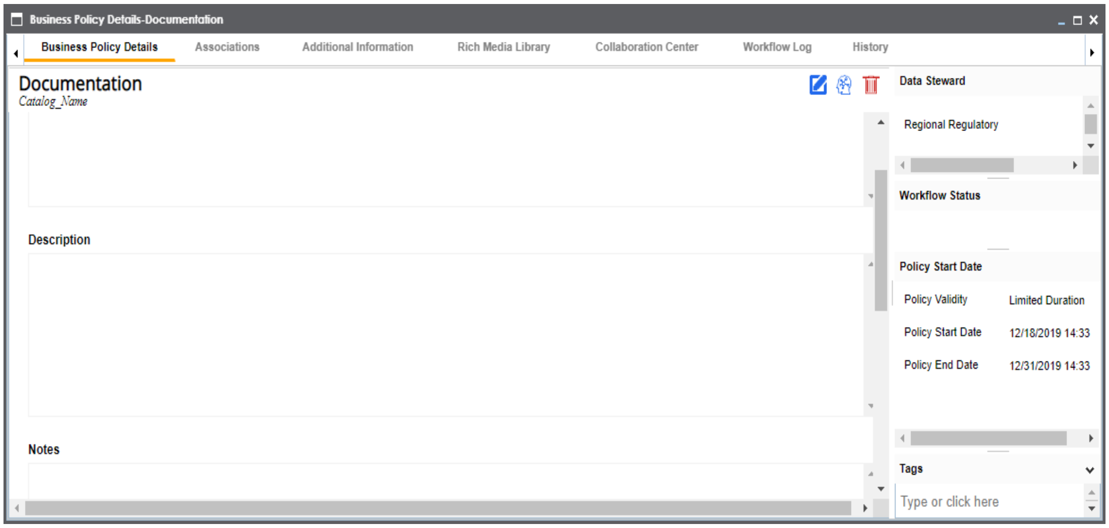
Attaching Rich Media

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

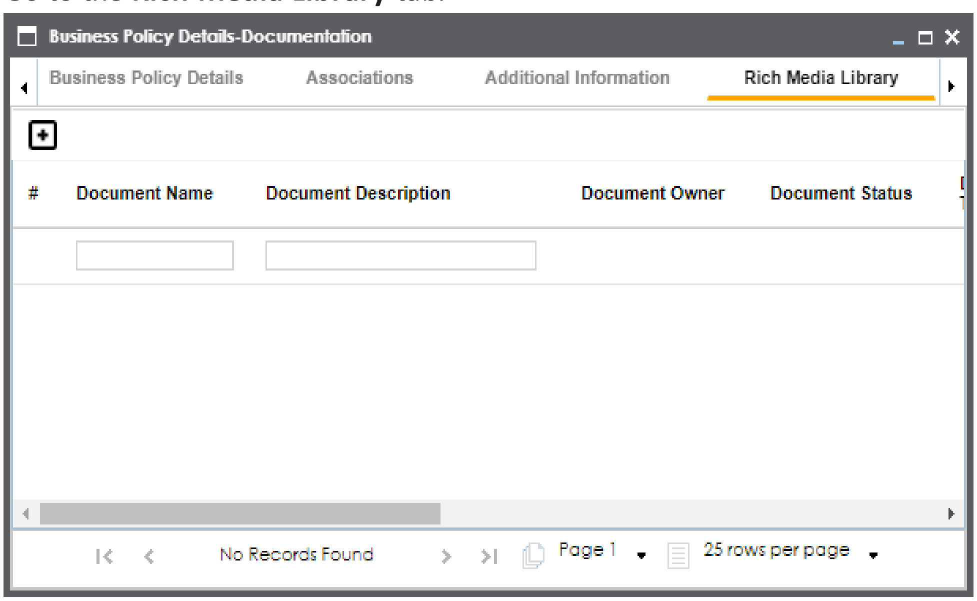
To attach rich media to a business policy, follow these steps:

1. In the list of business policies, under the options column, click to edit a business policy.

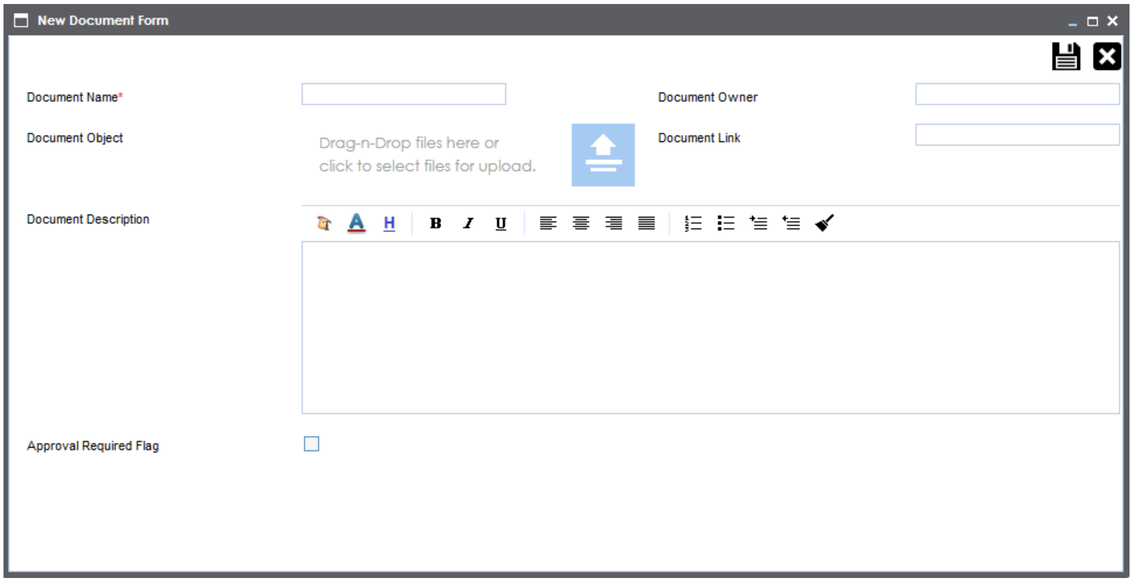
   The business policy opens in edit mode.



2. Go to the **Rich Media Library** tab.



3. Click .
   The New Document Form page appears.



4. Enter a Document Name and values to the other fields on the page.
   - If the rich media file needs an approval before being attached to the business policy, select the **Approval Required Flag** check box. This enables the Document Status drop down list. Select the appropriate status.

5. Drag and drop the rich media file to the Document Object area or click to browse and add a rich media file.

6. Click .
   The selected rich media file and its description are attached to the business policy or sent for approval if you selected the Approval Required Flag check box.

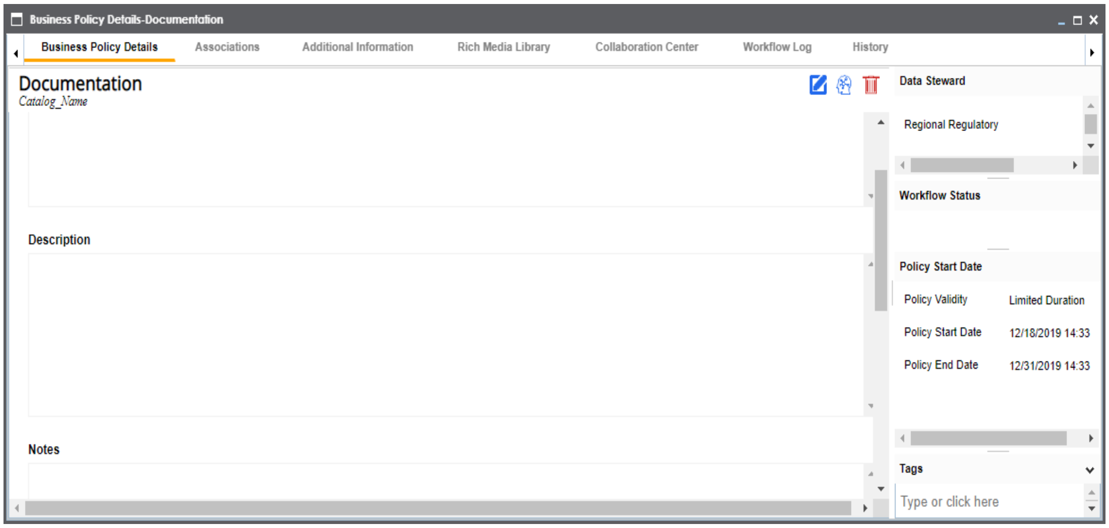
Setting Up Collaborations

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

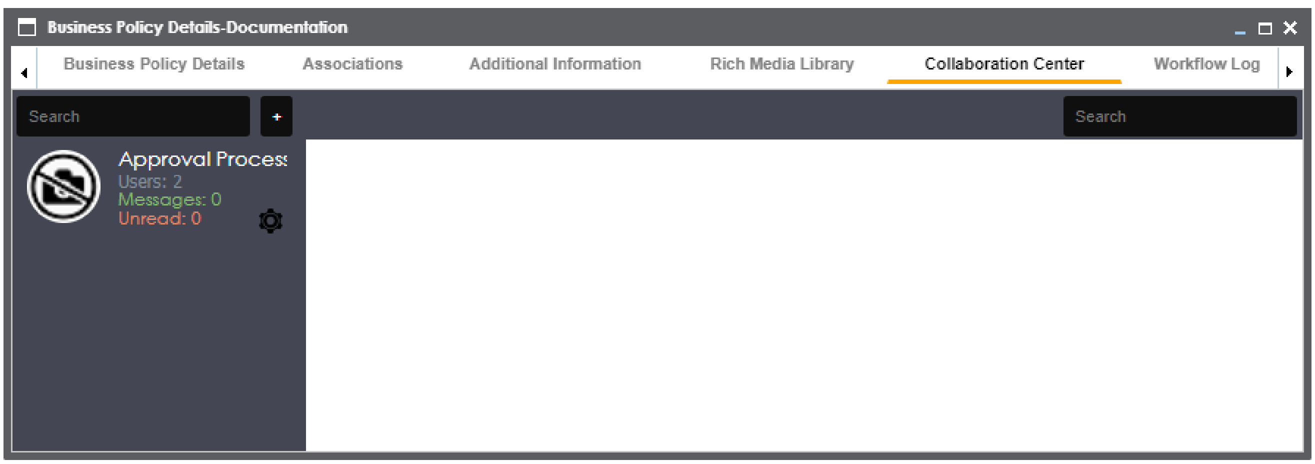
To start discussions with other users or your team, follow these steps:

1. In the list of business policies, under the options column, click ✎ to edit a business policy.

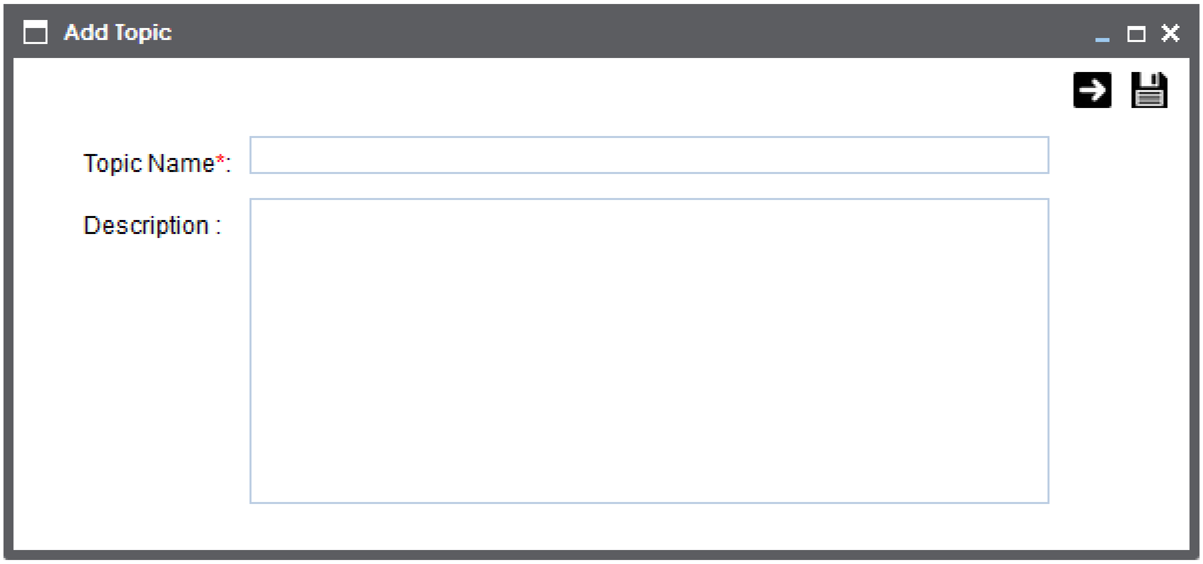
   The business policy opens in edit mode.

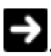


2. Go to the **Collaboration Center** tab.



3. Click .
   The Add Topic page appears.



4. Type the topic name and add a relevant 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 all 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

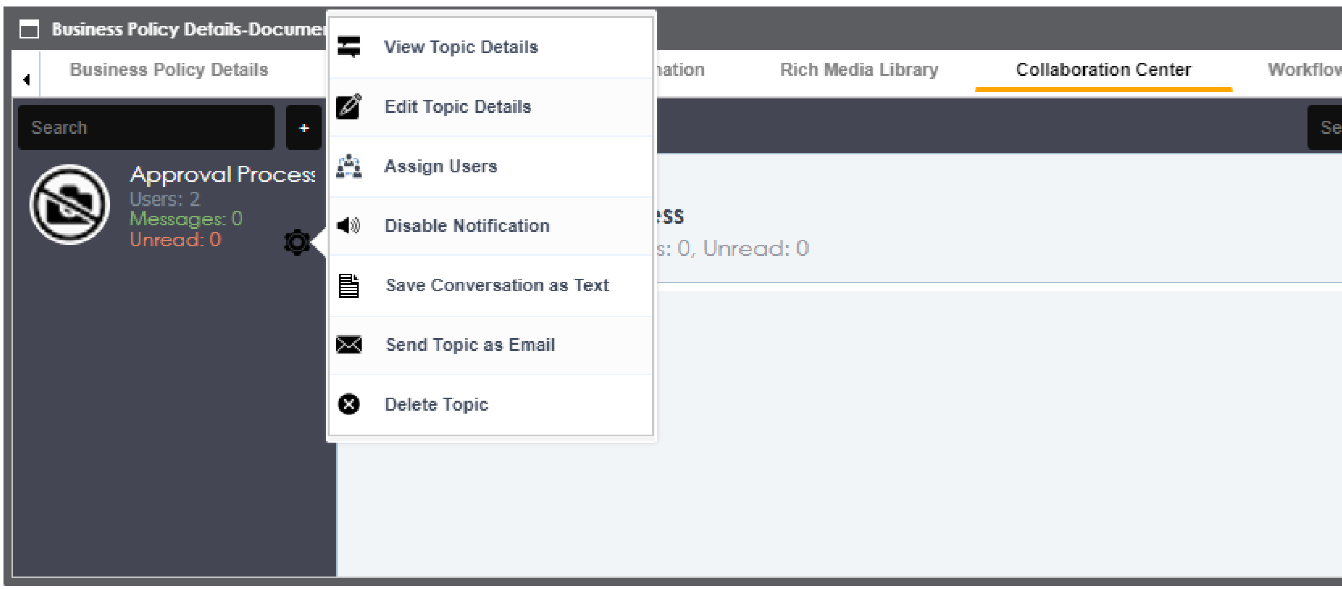
Managing Topics

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. Go to the **Collaboration Center**.
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

You can take a 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

You can edit the topic name and description to enrich it further.

Assign Users

You can assign multiple users to collaborate with you and contribute to the topic.

Disable Notification

You can choose whether you are notified whenever the topic is updated.

Save Conversation as Text

You can 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

You can 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

You can delete a topic that is no longer required.

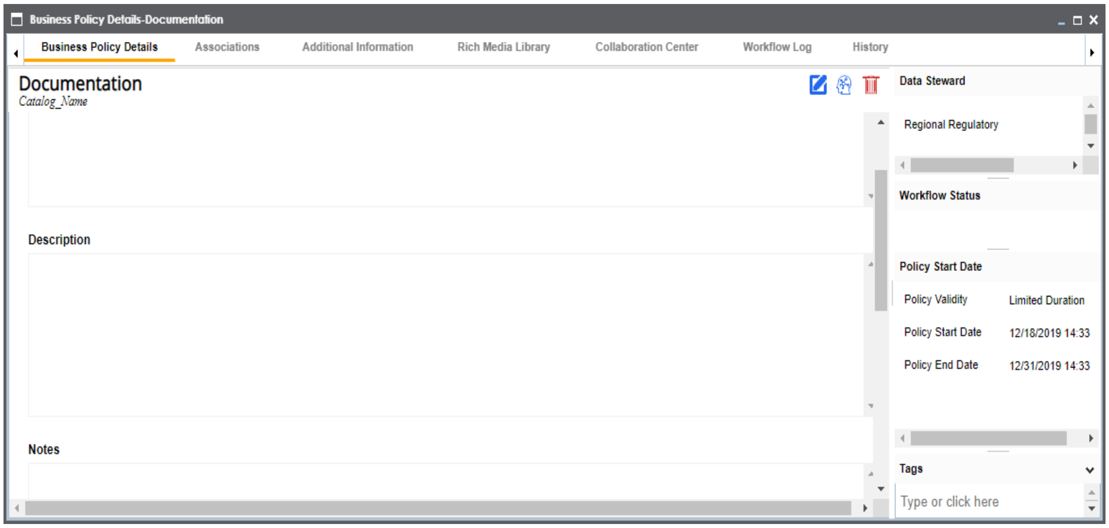
Viewing Workflow Logs

You can view the flow of actions that the workflow assigned to a business policy would follow. This enables you to view the current state of the business policy in the workflow.

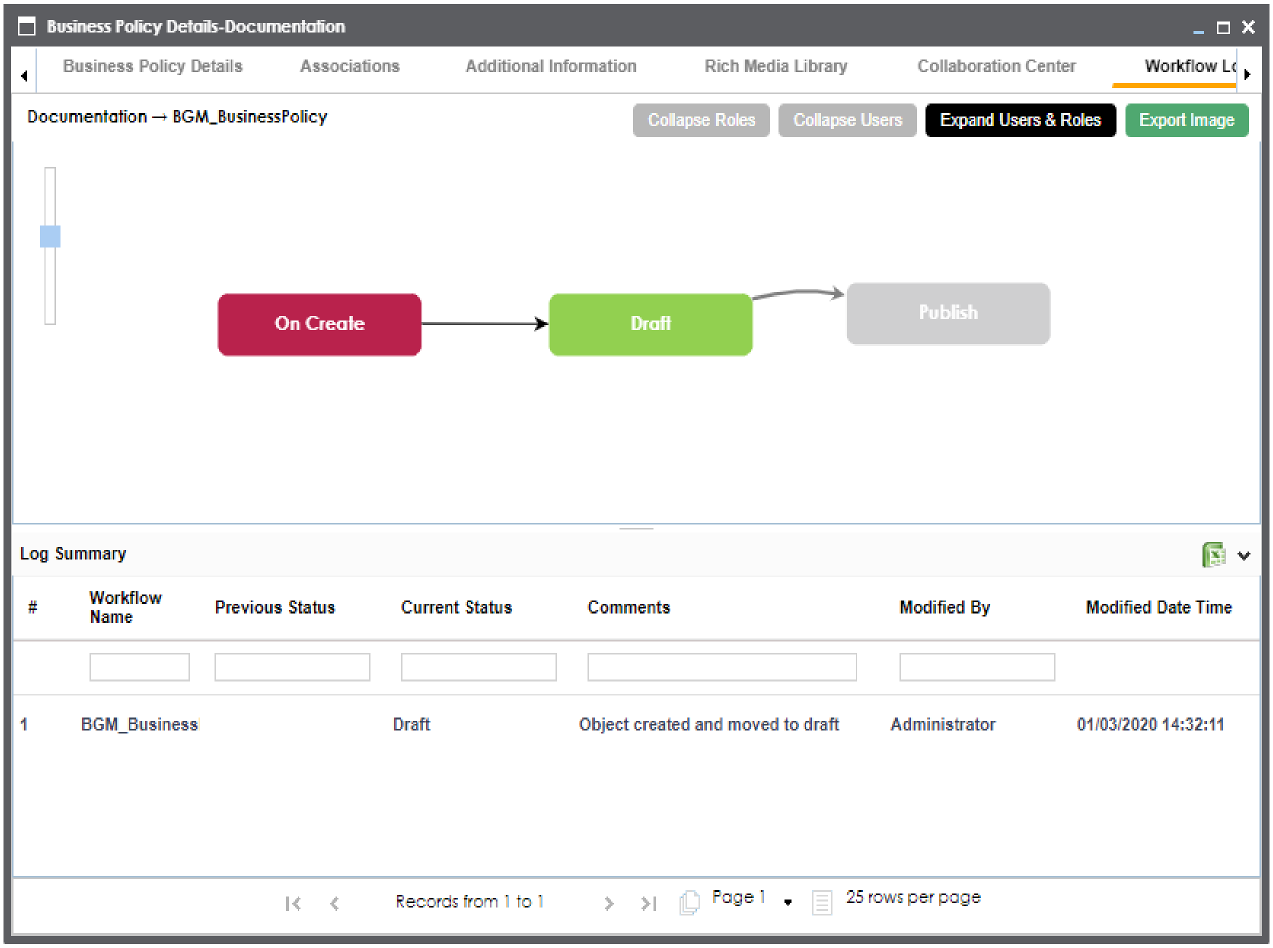
To view workflow log, follow these steps:

1. In the list of business policies, under the options column, click to edit a business policy.

The business policy opens in edit mode.



2. Go to the **Workflow Log** tab.



The following information is displayed:

- The workflow with all the stages in the flow, users, and roles are displayed in the upper pane.
- Current state of business policy is highlighted in the workflow.
- Log of the actions performed is displayed in the lower pane.

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

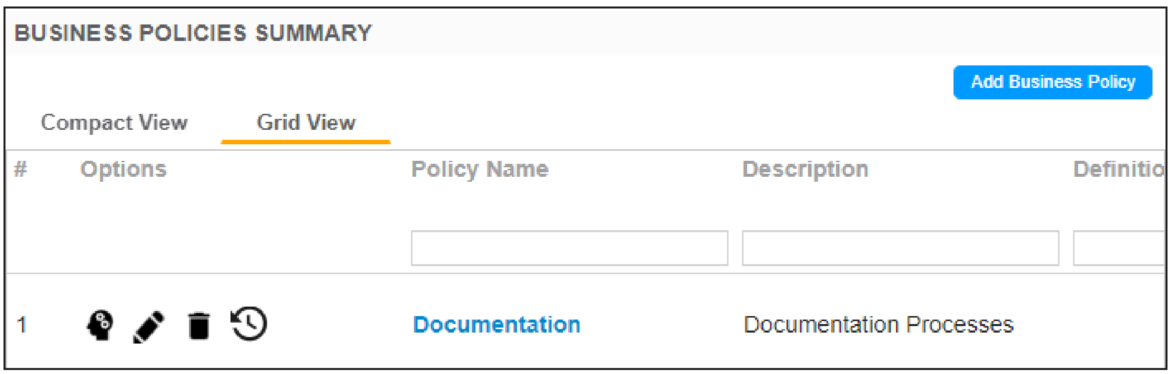
Managing Business Policies

Managing business policies involves:

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

To manage business policies, follow these steps:

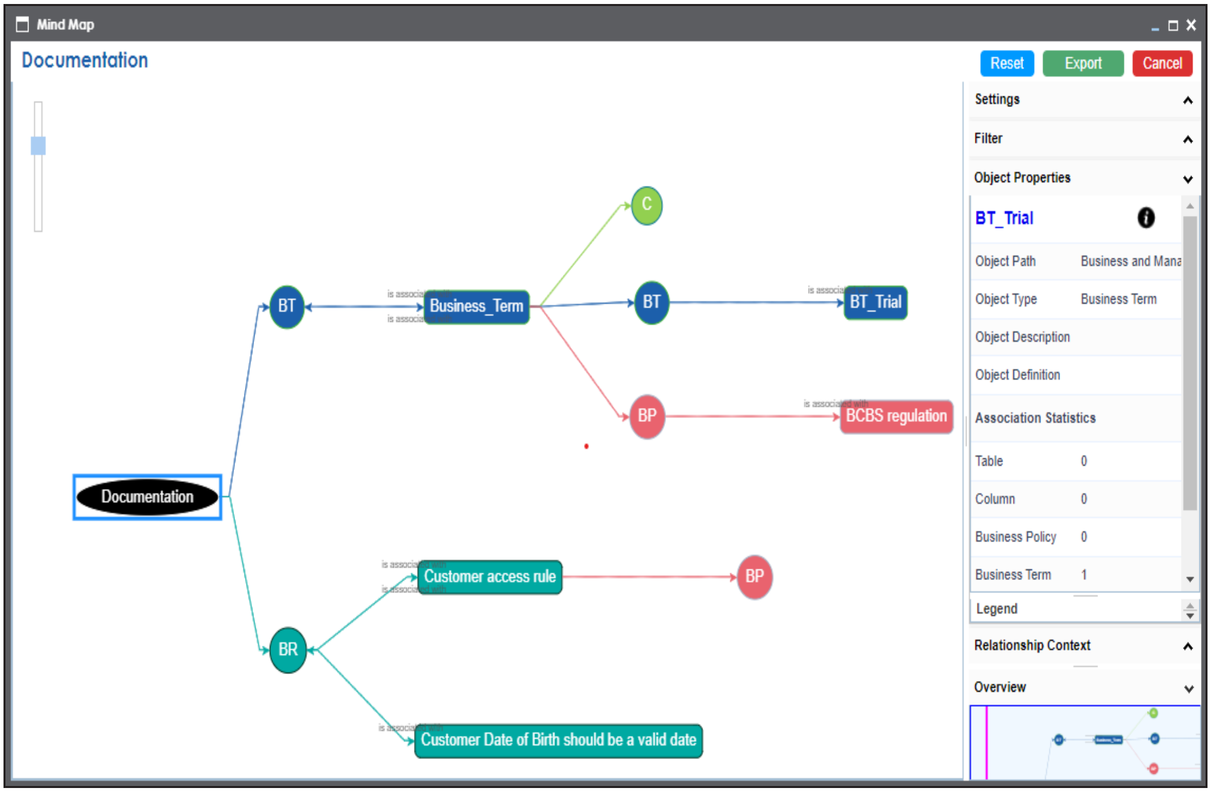
1. Go to the list of business policies in your catalog.



2. Use the following options:

View Mind Map ()

A mind map displays the pictorial representation of the business policy, its associations, status, data steward, 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 click **Expand** and select a level of expansion.

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

Filter: To filter the components of the mind map based on the asset type or relationship, expand the Filter section and select the appropriate filter criteria.

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.

Relationship Context: To view information about a relationship in the mind map, select the relationship line in the diagram. The Relationship Context section displays information about the selected relationship.

Edit Business Policy (✎)

You can enrich a business policy by defining associations, attaching rich media, and so on.

Delete Business Policy ( )

You can delete a business policy that is no longer required.

View History ( )

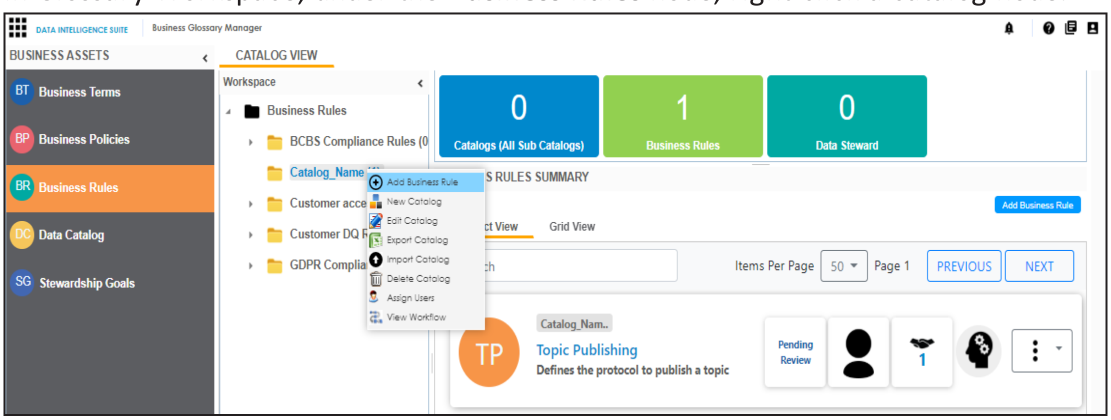
You can view all the actions performed on a business policy since it was created. Alternately, on the Edit Business Policy page, go to the History tab.

Creating Business Rules

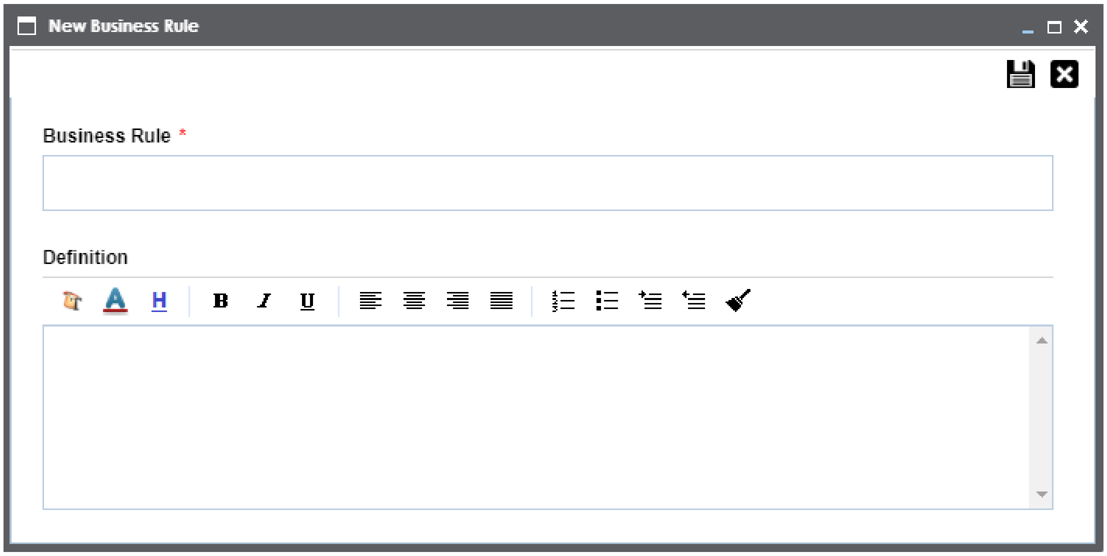
Business rules define a set of protocols to be followed. You can create business rules in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

To create business rules, follow these steps:

1. In the browser pane, click **Business Rules**.
   The Glossary Workspace switches to the business rules view.
2. In Glossary Workspace, under the **Business Rules** node, right-click a catalog node.



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



4. Enter Business Rule and Definition. Fields marked with a red asterisk are mandatory.

   For example:

   - Business Rule - Customer date of birth should be a valid date.
   - Definition - A customer's date of birth should be a valid date as per the US format.

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

Once the business rule has been added, you can enrich it further by:

- Defining associations
- Attaching documents
- Viewing workflow logs

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

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

- Viewing history

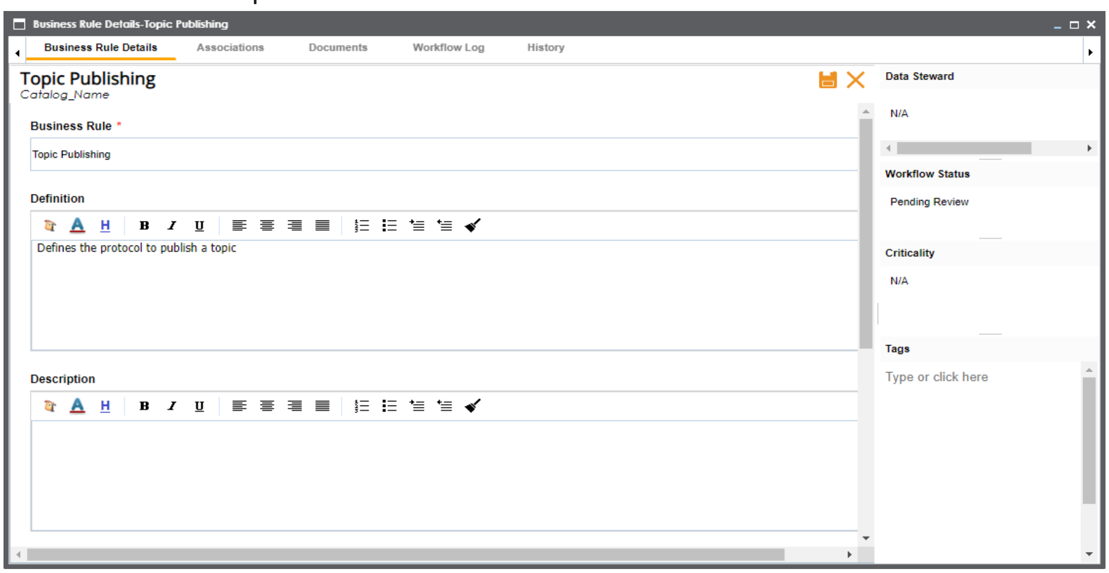
Defining Associations for Business Rules

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

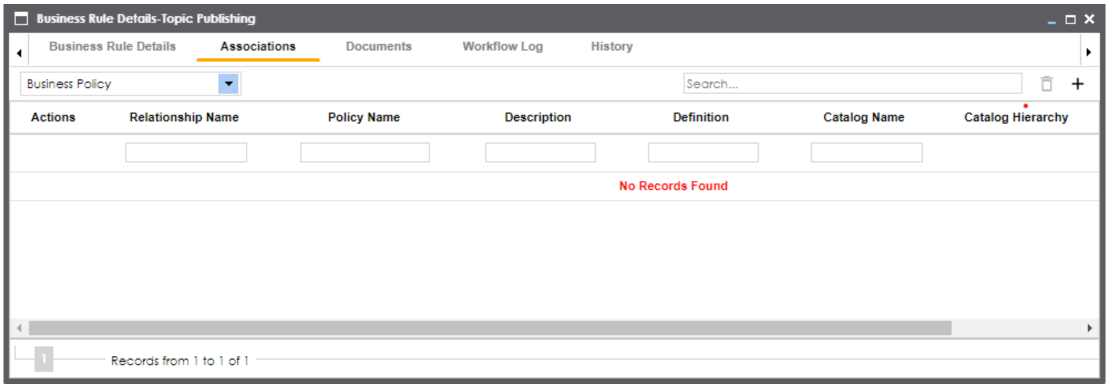
To define associations for business rules, follow these steps:

1. In the list of business rules, under the options column, click to edit a business rule.

   The business rule opens in edit mode.

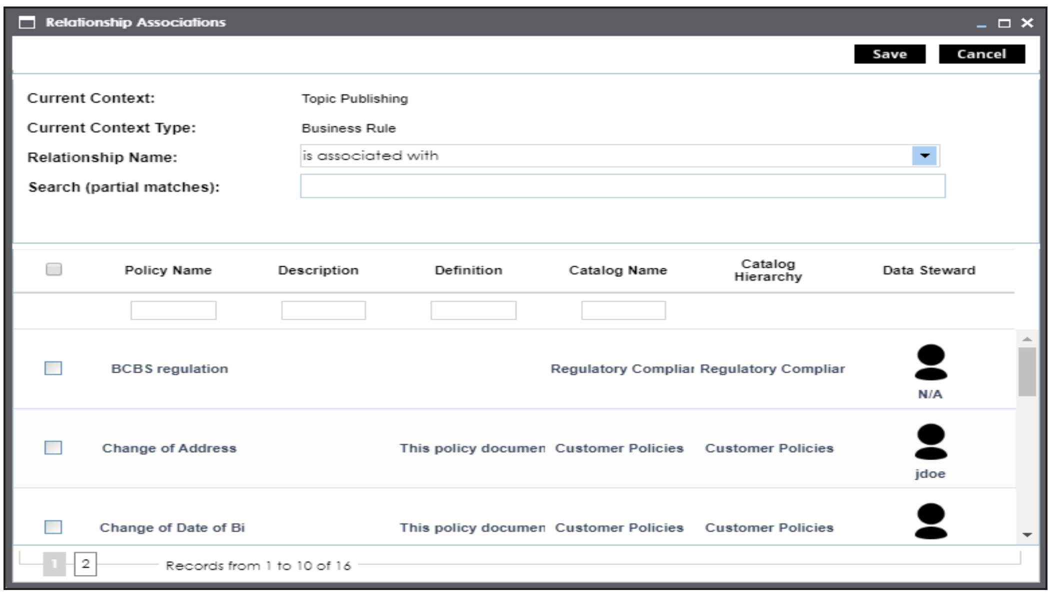


2. Go to the **Associations** tab.



3. In the object type list, select Business Policy.
4. Click +.

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



5. From the list, select the business policy that you want to associate to the business rule. If you know the object name, use the Search (partial matches) field to look up for it.
6. Click **Save**.

   The selected objects are associated to the business rule and added to the list of associations.

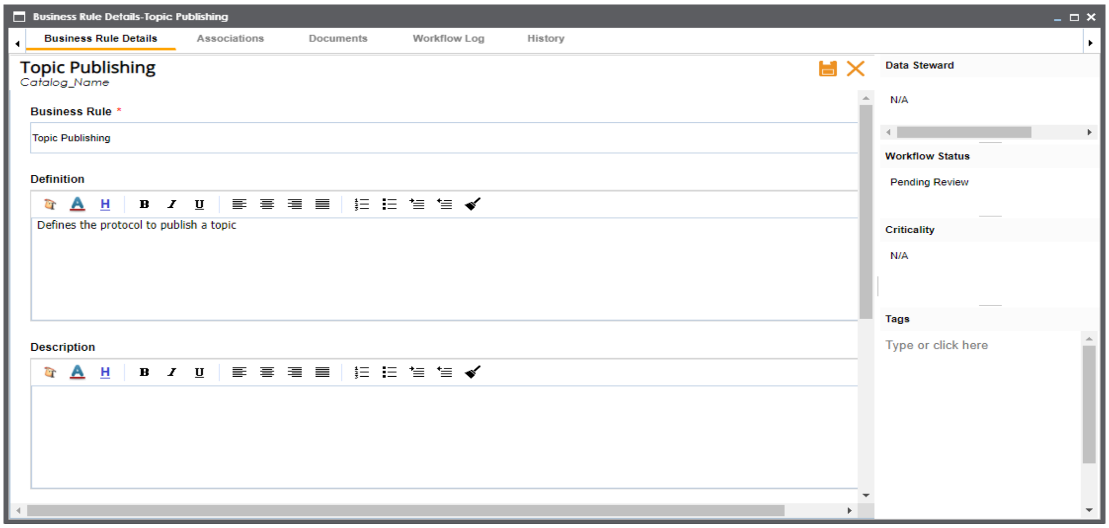
   You can define as many associations as required.

Attaching Documents

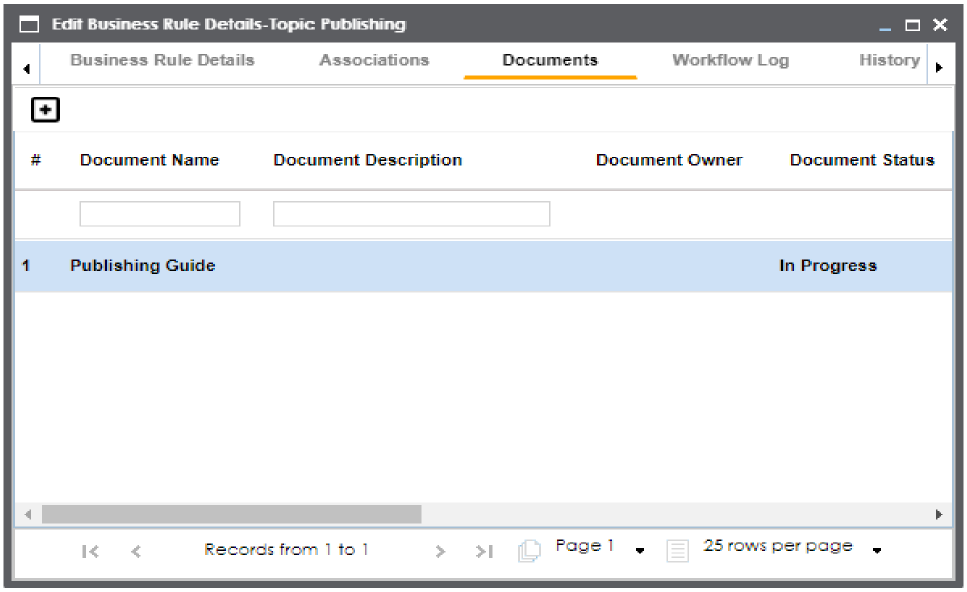
You can add supporting documents in the Word, Text, or PDF formats to a business rule.

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

1. In the list of business rules, under the options column, click to edit a business rule. The business rule opens in edit mode.

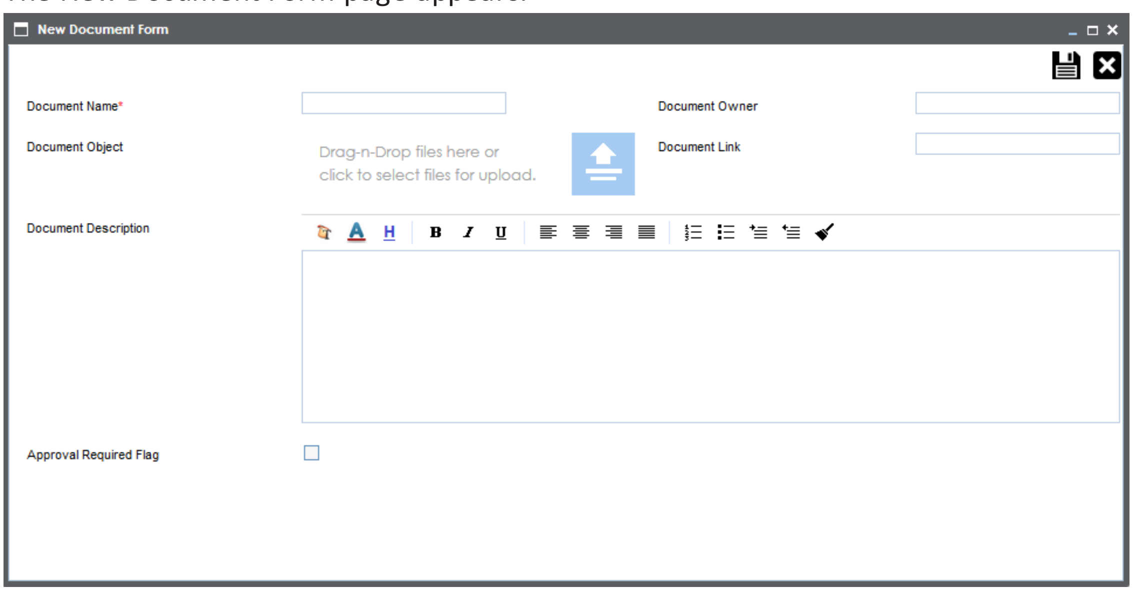


2. Go to the **Documents** tab.



3. Click .

   The New Document Form page appears.



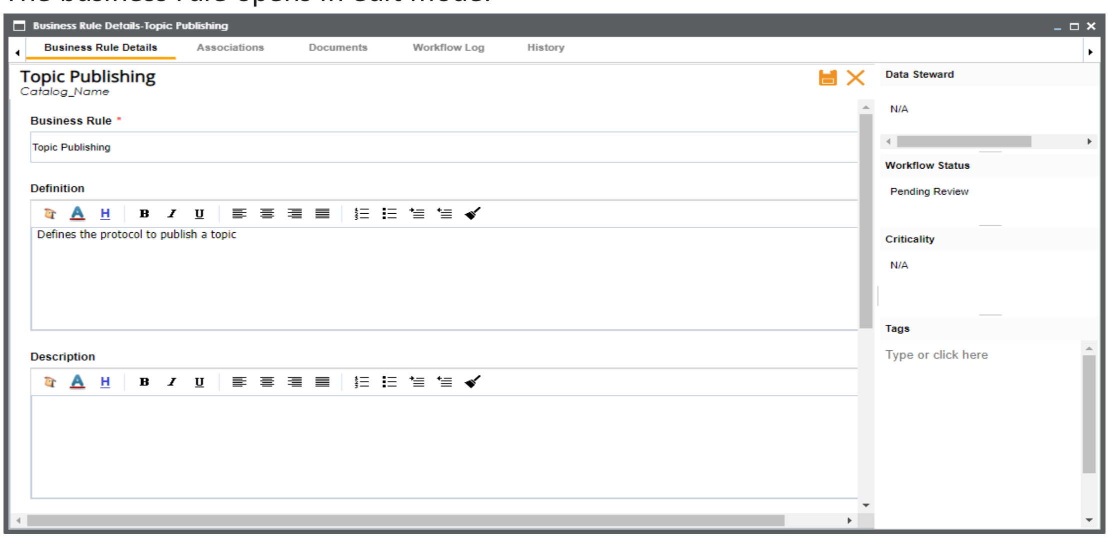
4. Enter a Document Name and values to the other fields on the page.
    - If the document file needs an approval before being attached to the business rule, select the **Approval Required Flag** check box. This enables the Document Status drop down list. Select the appropriate status.
5. Drag and drop the document to the Document Object area or click to browse and add a document.
6. Click .
   The selected document and its description are attached to the business rule or sent for approval if you selected the Approval Required Flag check box.

Viewing Workflow Logs

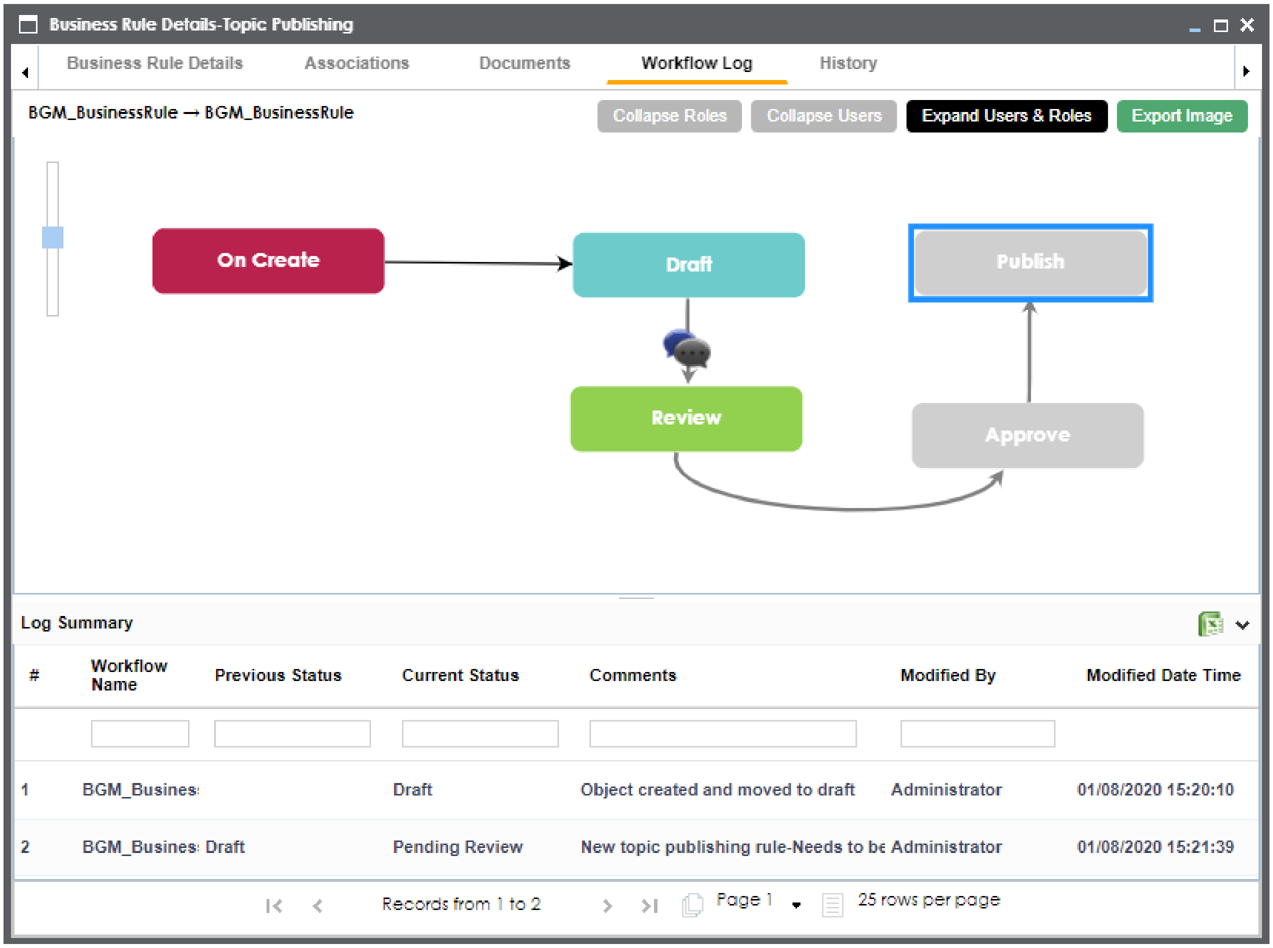
You can view the flow of actions that the workflow assigned to a business rule would follow. This enables you to view the current state of the business rule in the workflow.

To view workflow log, follow these steps:

1. In the list of business rules, under the options column, click to edit a business rule.
   The business rule opens in edit mode.



2. Go to the **Workflow Log** tab.



The following information is displayed:

- The workflow with all the stages in the flow, users, and roles are displayed in the upper pane.
- Current state of business rule is highlighted in the workflow.
- Log of the actions performed is displayed in the lower pane.

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

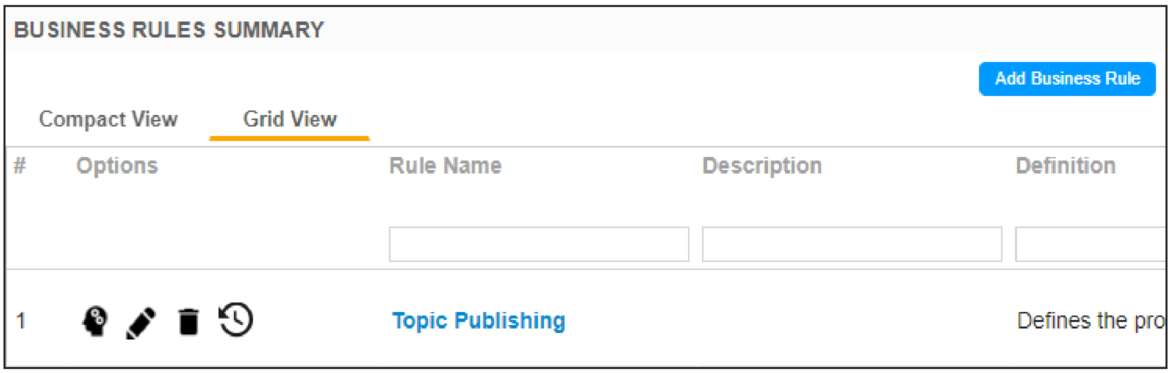
Managing Business Rules

Managing business rules involves:

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

To manage business rules, follow these steps:

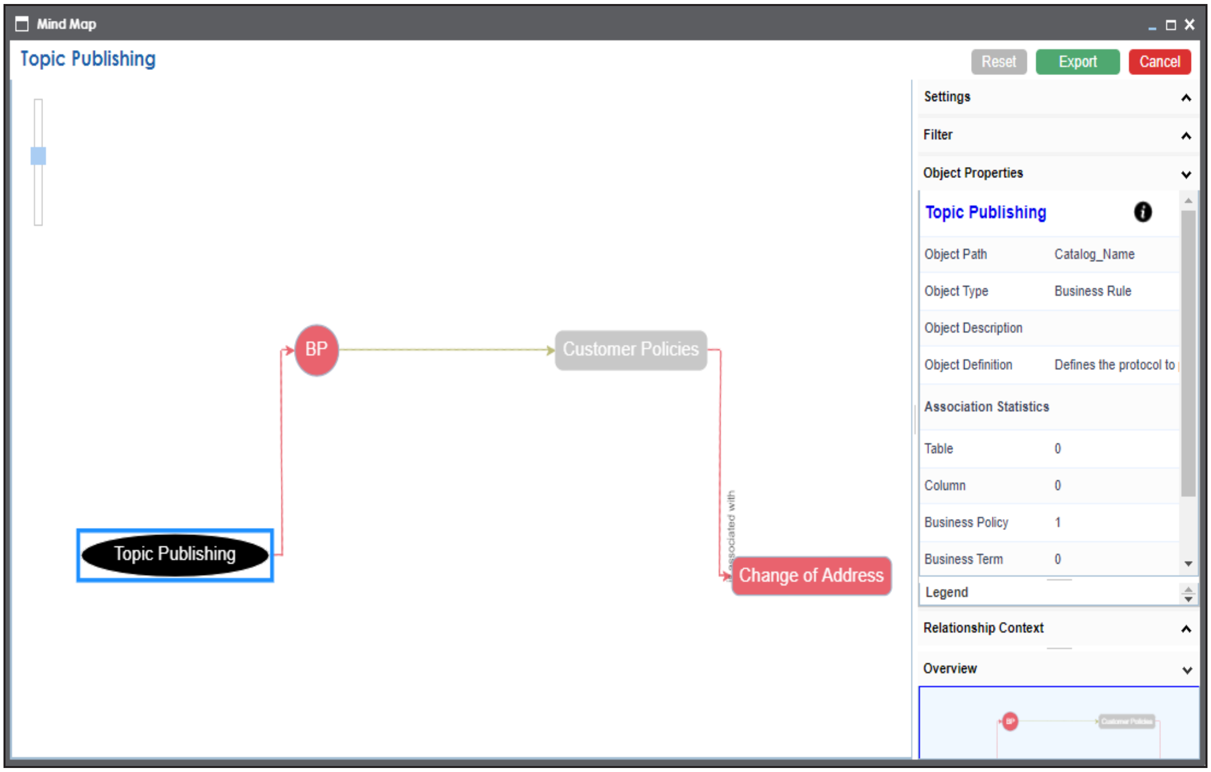
1. Go to the list of business rules in your catalog.



2. Use the following options:

View Mind Map ( )

A mind map displays the pictorial representation of the business rule, its associations, status, data steward, 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 click **Expand** and select a level of expansion.

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

Filter: To filter the components of the mind map based on the asset type or relationship, expand the Filter section and select the appropriate filter criteria.

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.

Relationship Context: To view information about a relationship in the mind map, select the relationship line in the diagram. The Relationship Context section displays information about the selected relationship.

Edit Business Rule ( )

You can enrich a business rule by defining associations, attaching documents, and so on.

Delete Business Rule ( )

You can delete a business rule that is no longer required.

View History ( )

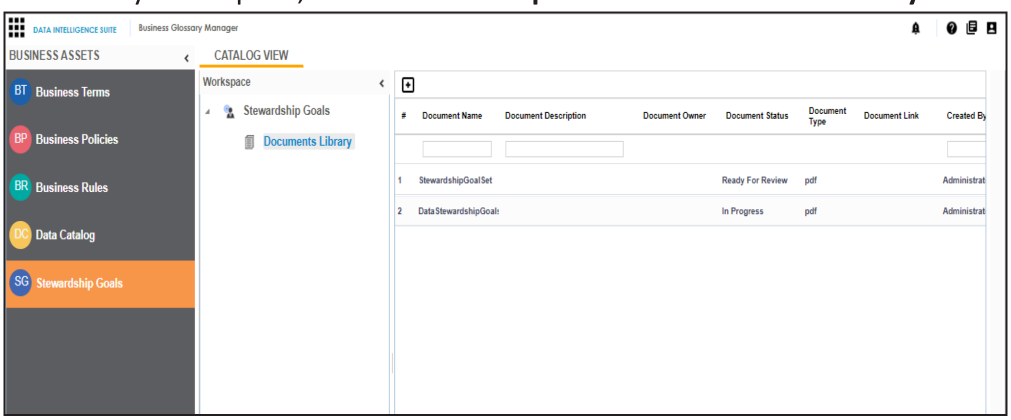
You can view all the actions performed on a business rule since it was created. Alternately, on the Edit Business Rule page, go to the History tab.

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.

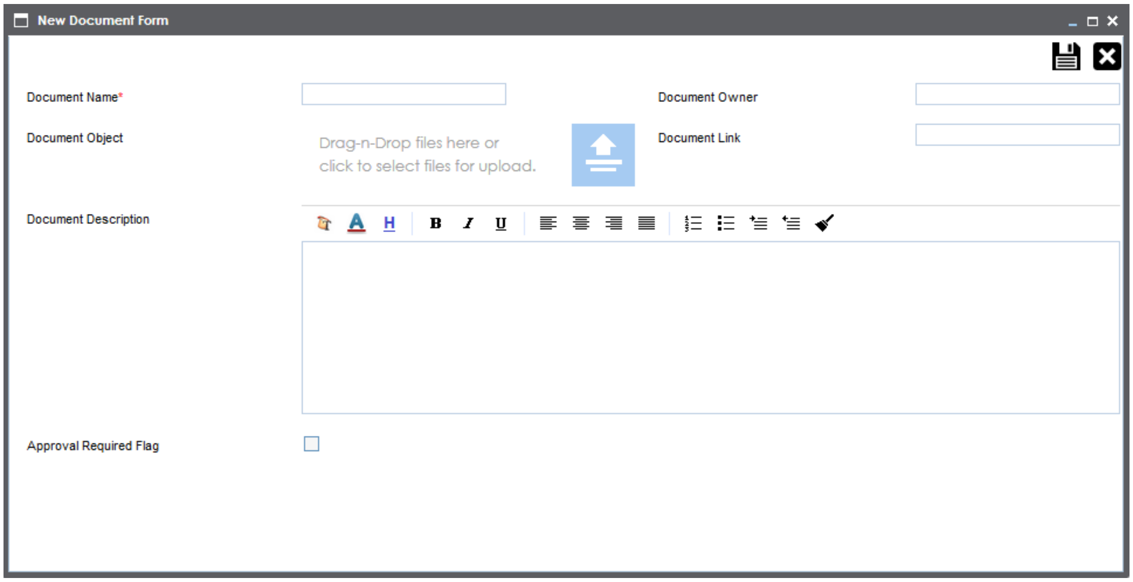
To set up stewardship goals, follow these steps:

1. In the browser pane, click **Stewardship Goals**.
   The Glossary Workspace switches to the stewardship goals view.
2. In Glossary Workspace, click **Stewardship Goals** > **Documents Library**.



3. Click .

   The New Document Form page appears.



4. Enter a Document Name and values to the other fields on the page.
   - If the document file needs an approval before being added to the collection of stewardship goals, select the **Approval Required Flag** check box. This enables the Document Status drop down list. Select the appropriate status.
5. Drag and drop the stewardship goals document to the Document Object area or click to browse and add a document.
6. Click .

   The selected stewardship goals document and its description are added to the stewardship goals set or sent for approval if you selected the Approval Required Flag check box.

Once a stewardship goals document is set up, you can manage it using the options available against 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

You can view the stewardship goals document within the Business Glossary Manager in the preview mode.

Edit

You can update document properties, such as owner, link, description, approval requirement, and status.

Delete

You can delete a document that is no longer required.