

erwin Data Intelligence Suite

Business Glossary Management Guide

Release v10.2

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Managing Business Glossary

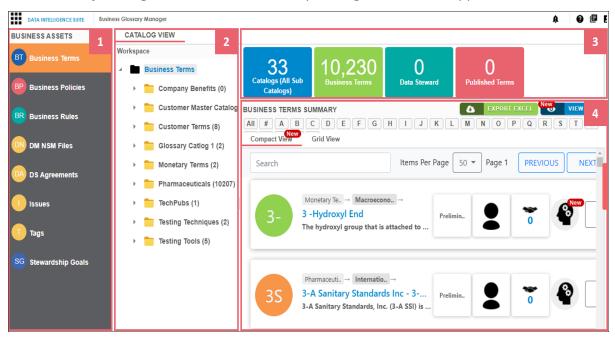
This section walks you through business glossary management.

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	asset type. It displays the available catalogs. Expand catalogs to view the exist-	
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.	
	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

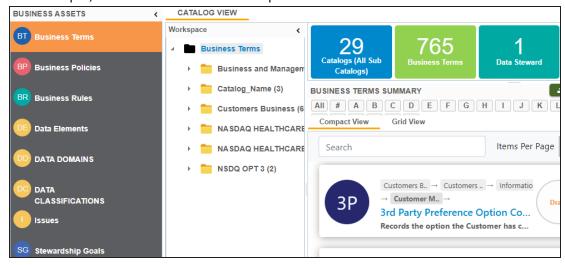
Once, you have created and set up these business glossary assets, you can assign data stewards and <u>set up stewardship goals</u>.

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. <u>Managing catalogs</u> involves:

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

Managing Catalogs

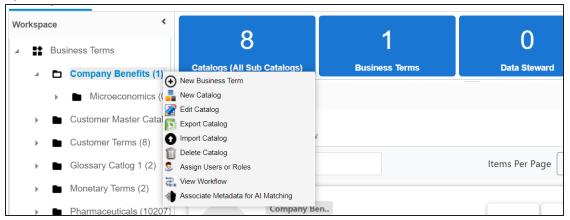
Managing catalogs involves:

- Creating sub-catalogs
- Editing catalogs
- Importing or exporting catalogs
- Assigning users and roles
- Viewing workflows
- Associating metadata for AIMatch

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 an 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. Deleting a catalog also deletes all business assets in the catalog.

Assign Users or Roles

Use this option to assign users and roles to the catalog based on your organization. For more information on assigning users and roles, refer to the <u>Assigning Roles and Users topic</u>.

Associate Metadata for AI Matching

Use this option to schedule an AlMatch job to associate metadata to a business term. For more information, refer to the <u>Associating Metadata for Al Matching</u> topic.

Assigning Roles and Users

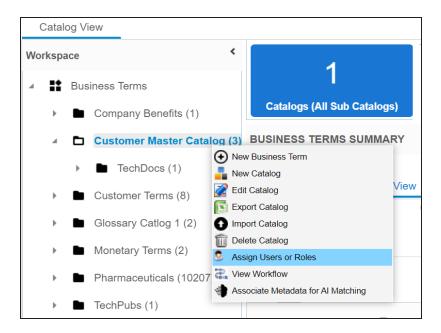
You can assign roles and users to a catalog. These assignments facilitates governance responsibilities assignment to the business assets in the catalog.

Assigning Roles

To assign roles, follow these steps:

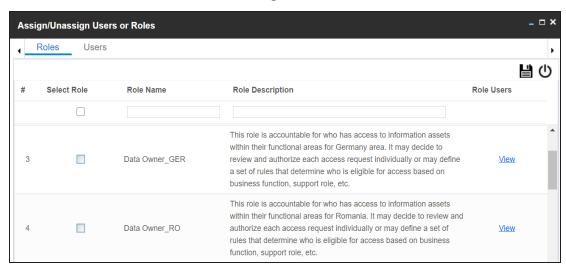
1. Right-click a catalog.

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



2. Click Assign Users or Roles.

The **Assign/Unassign Users or Roles** page appears. By default, the Roles tab appears. You can click View to view the users assigned to a role.

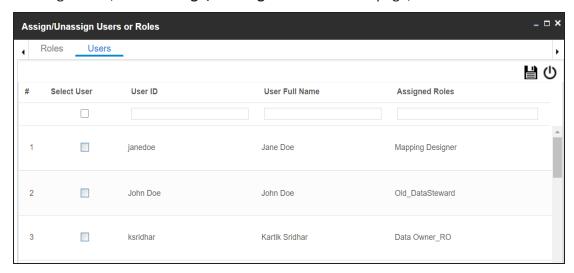


- 3. Select the required roles.
- 4. Click

The selected roles are assigned to the catalog.

Assigning Users

To assign users, on the **Assign/Unassign Users or Roles** page, click the **Users** tab.



Select the required users and click .

The users are assigned to the catalog.

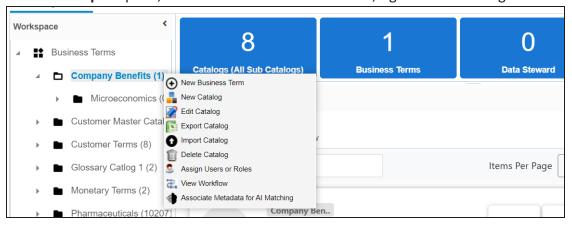
Creating Business Terms

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:

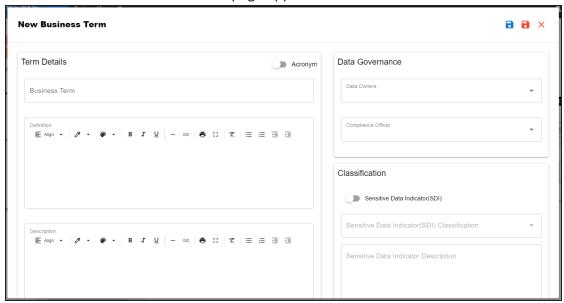
- 1. Go to Application Menu > Data Literacy > Business Glossary Manager.
- 2. In the browser pane, click **Business Terms**. The Workspace switches to the business terms view.

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.

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

Field Name	Description
Uploader	
Acronym	Specifies whether the business term is an acronym.
	Specifies the name of the data steward responsible for the business term.
Data Steward	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 <u>Configuring Asset Details</u> 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 <u>Managing Business</u> <u>Glossary Workflows</u> topic.

Once you create a business term, you can click a business term in the Business Term Summary pane to view it. 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:

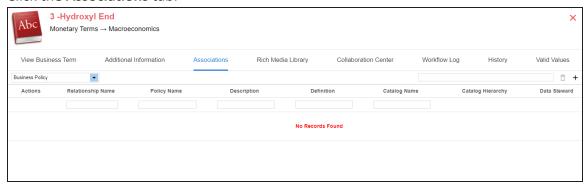
- Editing or deleting business terms
- Viewing mind maps
- Exporting business terms
- Viewing history

Setting Up Associations for Business Terms

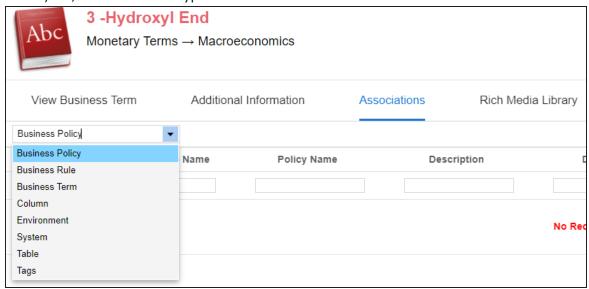
By default, you can associate business terms with business assets (business policies and other business terms) and technical assets (columns, environments, and tables). You can control the available asset types for association using the Business Glossary Manager settings page. For more information, refer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

To set up associations, follow these steps:

- On the Grid View tab, under the Options column, click .
 The business term opens in edit mode.
- 2. Click the **Associations** tab.

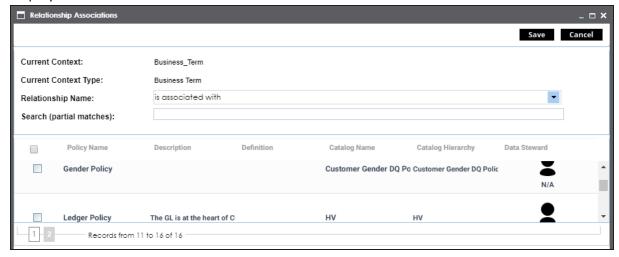


3. In the asset type (business policies, business terms, columns, environments, and tables) list, select an asset type to associate with the business term.



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.

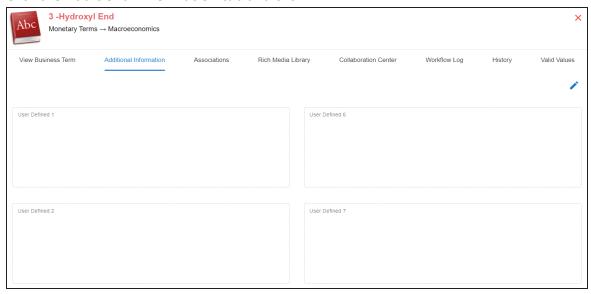
You can define as many associations as required.

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:

- On the Grid View tab, under the Options column, click .
 The business term opens in edit mode.
- 2. Click the **Additional Information** tab and click .



- 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 <u>Configuring Language Settings</u> 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.

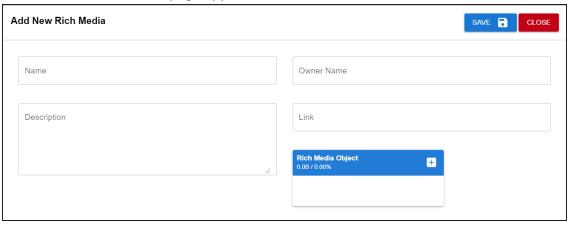
To add rich media to business terms, follow these steps:

- 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 Add New Rich Media 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
	Specifies the name of the rich media being attached to the business
Name	term.
	For example, Business Term Details.
Description	Specifies a description of the rich media that is being added.
Owner Name	Specifies the document owner's name.
Owner Name	For example, John Doe
Link	Specifies the URL of the rich media.
	For example, https://drive.google.com/file/I/2sC2_SZIyeFKI7OOn-
	b5YkMBq4ptA7jhg5/view
	Click the Pick Files button to choose and upload files from your com-
Rich Media	puter.
Object	

5. Click Save.

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.

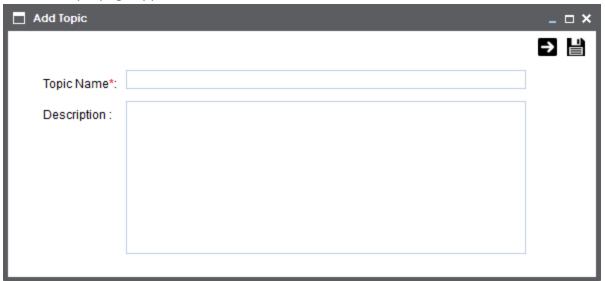
To set up collaborations, follow these steps:

- 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 (). <u>Managing a topic</u> involves:

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

Managing Topics

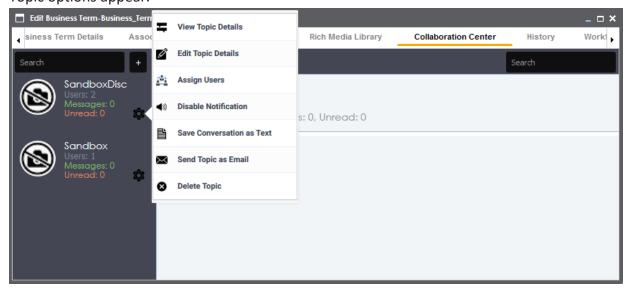
Managing topics involves:

- 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 the 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.

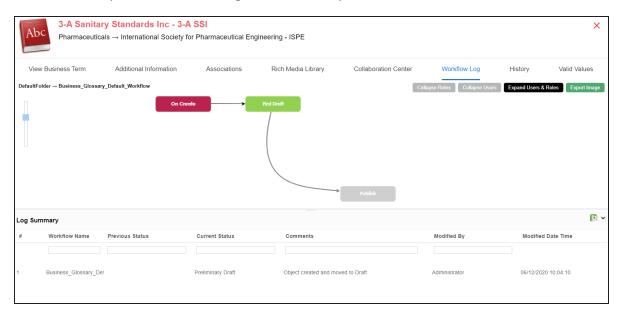
By default, it displays only the stages of the workflow and highlights the current stage. Use the following options to view more information:

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.

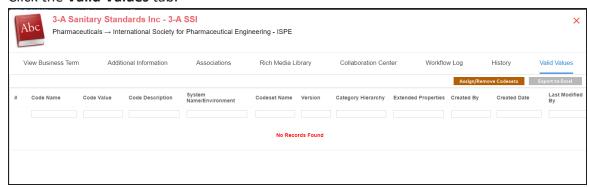
Assigning Valid Values

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:

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 list of valid values, click **Export to Excel**.

Managing Business Terms

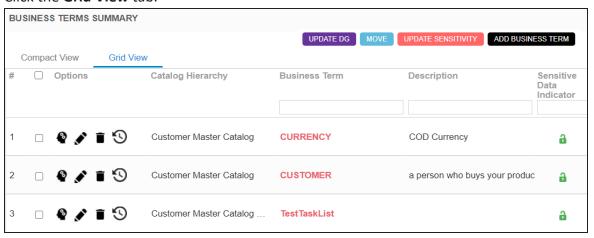
Managing business terms involves:

- Editing or deleting business terms
- Viewing mind maps

Viewing history

To manage business terms, follow these steps:

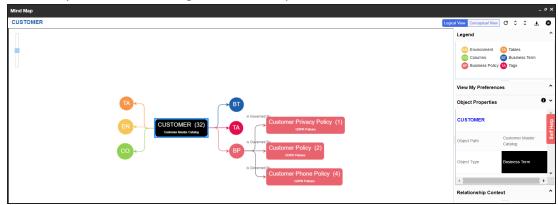
1. Click the Grid View tab.



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 more in a logical and conceptual view.



Use the following options to work on the mind map:

Reload Diagram (C)

Use this option to reload the mind map.

Expand Diagram (\$\hat{\circ}\$)

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

Reset Diagram to Original View (X)

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

Export (±)

Use this option to export the mind map. Hover over **Export** and use the following options:

Mind Map - Excel Report: Use this option to download the mind map in the .xlsx format. Ensure that you expand the mind map before downloading the report.

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.

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.

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.

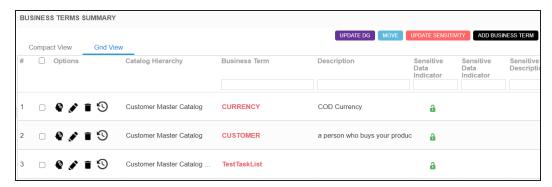
Moving Business Terms

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:

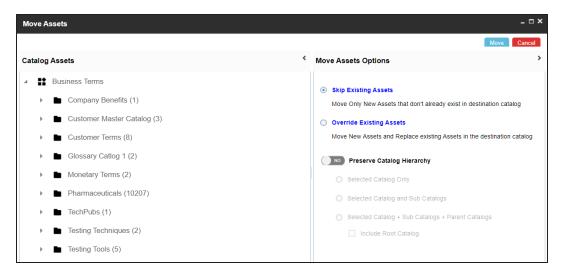
- In the Workspace pane, under the Business Terms node, click the required catalog.
 By default, the Compact View tab appears.
- 2. Click the Grid View tab.

The list of business terms in the catalog appears.



- 3. Select the required rows or use the check box at the 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.

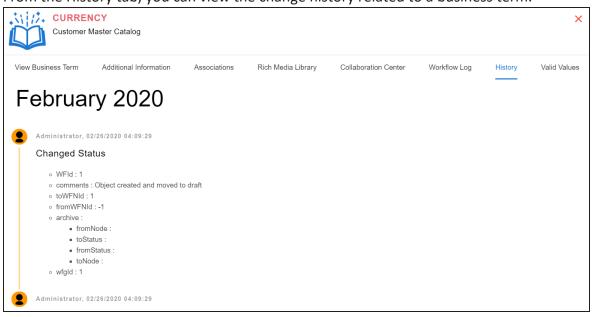
The business term is moved to the selected catalog.

Viewing History

You can view and track a list of changes for a business term. The History tab displays change status, added records, and more.

To view the history of a business term, follow these steps:

- On the Grid View tab, under the Options column, click .
 The business term opens in edit mode.
- Click the History tab.From the History tab, you can view the change history related to a business term.

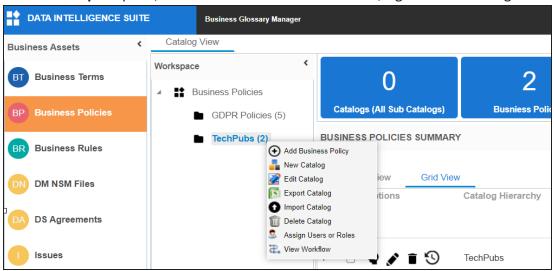


Creating Business Policies

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.

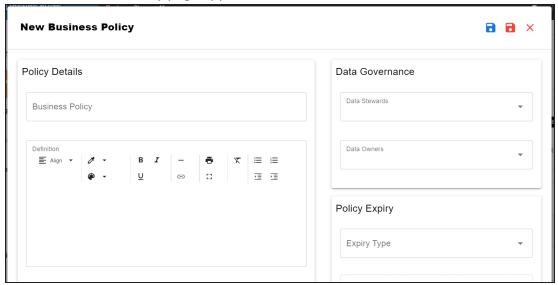
To create business policies, follow these steps:

- 1. Go to Application Menu > Data Literacy > Business Glossary Manager.
- 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	Specifies the business policy of the organization.
Policy	For example: Change of Address.
	Specifies the definition of the business policy.
Definition	For example: This policy documents the rules for change of cus-
	tomer's address.
Data Stewards	Specifies the data stewards for data governance process.
Data Owners	Specifies the data owner for data governance process.
Sensitive Data	Specifies whether the business policy is sensitive.
Indicator(SDI)	Switch Sensitive Data Indicator(SDI) to Yes to mark the business
marcator (3D1)	policy as sensitive.
Sensitive Data Indicator (SDI) Classification	Specifies the SDI classification of the business policy.
	For example, PHI.

Field Name	Description
	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)	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 you create a business policy, you can click a business policy in the Business Policy Summary pane to view it. 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:

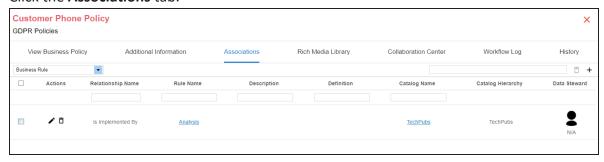
- Viewing, editing, or deleting business policies
- Viewing mind maps
- Viewing history

Setting Up Associations for Business Policies

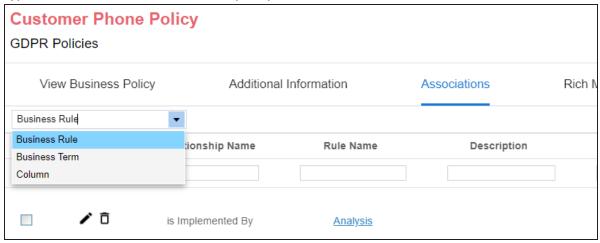
By default, you can associate business policies with business assets (business rules and business terms) and technical assets (columns). You can control the asset types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

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

- 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

Relationship Associations

Current Context:

Current Context Type:

Business Policy

Relationship Name:

Is associated with

Search (partial matches):

Rule Name

Description

Definition

Catalog Name

Catalog Hierarchy

Data Steward

Customer address sh

Customer address sh Customer DQ Rules

N/A

Customer Date of Birt

The Date of Birth for 1 Customer DQ Rules

Customer DQ Rules

N/A

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.

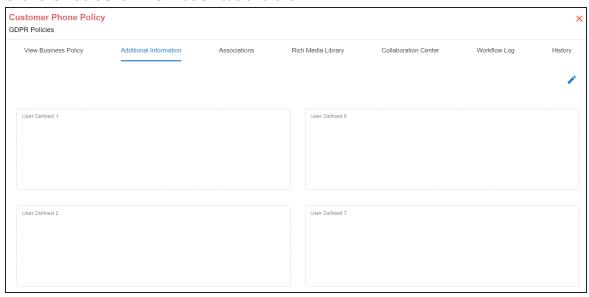
Setting Up Additional Details

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

To set up additional information, follow these steps:

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 .



- 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 <u>Configuring Language Settings</u> topic.

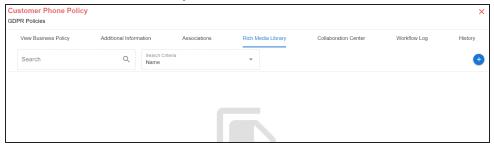
Adding Rich Media

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:

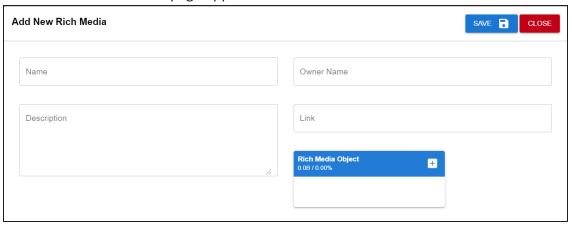
On the Grid View tab, under the Options column, click .
 The business policy opens in edit mode.

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



3. Click 😃.

The Add New Rich Media 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
Name	Specifies the name of the document being attached to the business policy.
	For example, Business Policy Details.
Description	Specifies a description of the rich media that is being added.
Owner Name	Specifies the document owner's name.
	For example, John Doe
Link	Specifies the URL of the rich media.
	For example, https://drive.google.com/file/I/2sC2_SZIyeFKI7OOn-

Field Name	Description
	b5YkMBq4ptA7jhg5/view
Rich Media Object	Click the Pick Files button to choose and upload files from your computer.

5. Click Save.

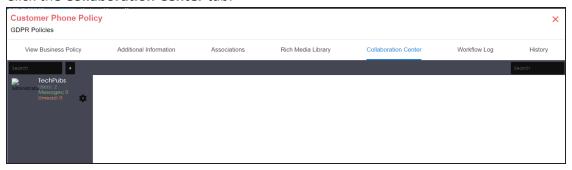
The selected rich media file and its description are added to the business policy.

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.

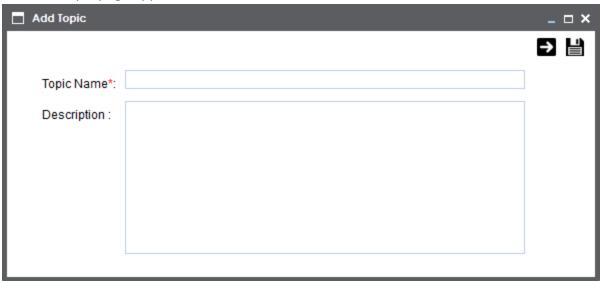
To set up collaborations, follow these steps:

- 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 (). <u>Managing a topic</u> involves:

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

Managing Topics

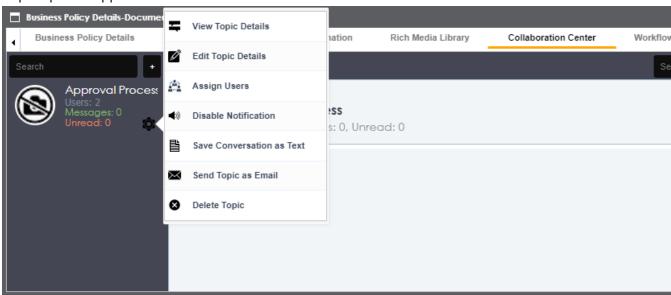
Managing topics involves:

- 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:

- 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

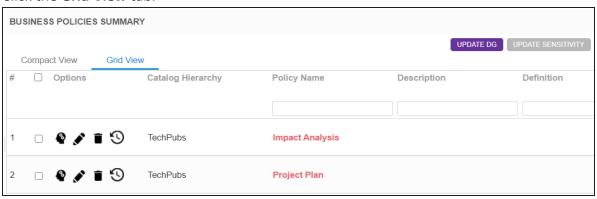
Managing business policies involves:

- Editing or deleting business policies
- Viewing mind maps

- Exporting business policies
- Viewing history

To manage business policies, follow these steps:

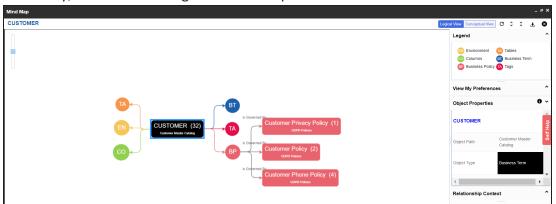
1. Click the Grid View tab.



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

View Mind Map ()

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



Use the following options to work on the mind map:

Reload Diagram (C)

Use this option to reload the mind map.

Expand Diagram ($\hat{\circ}$)

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

Reset Diagram to Original View (X)

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

Export (±)

Use this option to export the mind map. Hover over **Export** and use the following options:

Mind Map - Excel Report: Use this option to download the mind map in the .xlsx format. Ensure that you expand the mind map before downloading the report.

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.

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.

For more information on mind maps, 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 (9)

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.

Viewing History

You can view and track a list of changes for a business policy. The History tab displays change status, added records, and more.

To view the history of a business policy, follow these steps:

- 1. On the **Grid View** tab, under the **Options** column, click . The business term opens in edit mode.
- Click the History tab.From the History tab, you can view the change history related to a business policy.



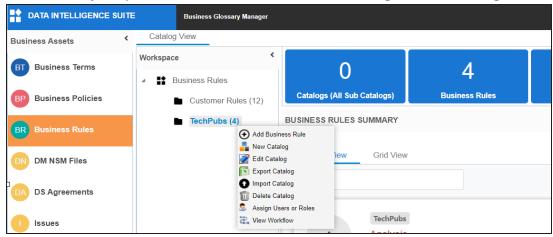
Creating Business Rules

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:

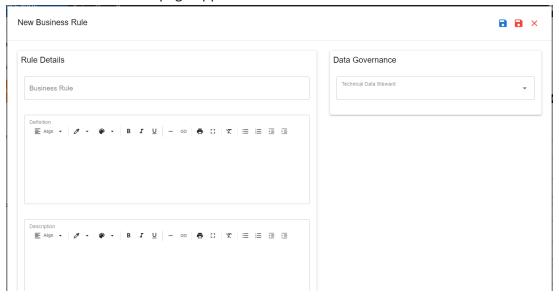
- 1. Go to Application Menu > Data Literacy > Business Glossary Manager.
- In the browser pane, click Business Rules.
 The Workspace switches to the business rules view.

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.
Technical Data	Specifies the name of technical data steward for data governance pro-
Steward	cess.
	Specifies the definition of the business rule.
Definition	For example: A customer's date of birth should be a valid date as per
	the US format.
Sensitive Data	Specifies whether the business rule is sensitive.
Indicator(SDI)	Switch Sensitive Data Indicator(SDI) to Yes to mark the business rule
maleator (3B1)	as sensitive.
	Specifies the SDI classification of the business rule.
Sensitive Data	For example, PHI.
Indicator (SDI) Classification	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 you create a business rule, you can click a business rule in the Business Rule Summary pane to view it. You can enrich it further by:

- Setting up associations
- Attaching rich media

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

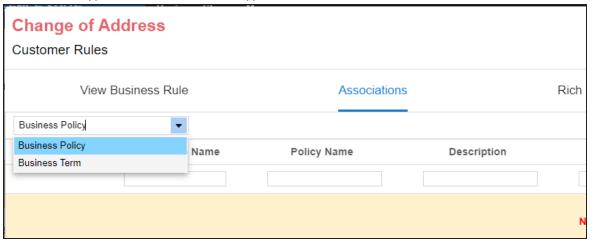
By default, you can associate business rules with business assets (business policies). You can control the asset types available for association using the Business Glossary Manager settings page. For more information, refer to the configuration topic.

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

- On the Grid View tab, under the Options column, click .
 The business rule opens in edit mode.
- 2. Click the Associations tab.

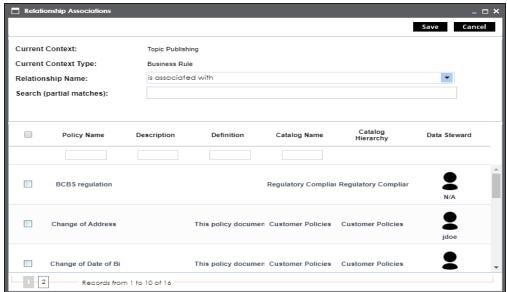


3. In the asset type list, select an asset type to associate with the business rule.



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.
- Click Save.
 The selected objects are associated with the business rule and added to the list of

associations.

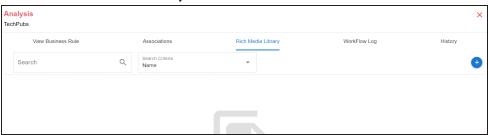
You can define as many associations as required.

Adding Rich Media

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

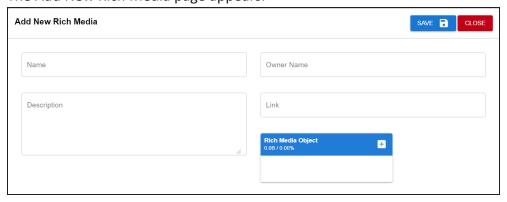
To add documents to a business rule, follow these steps:

- On the Grid View tab, under the Options column, click .
 The business rule opens in edit mode.
- 2. Click the Rich Media Library tab.



3. Click .

The Add New Rich Media 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
Name	Specifies the name of the document being attached to the business
	rule.
	For example, Business Rule Details.
Description	Specifies a description of the rich media that is being added.
Owner Name	Specifies the document owner's name.
Owner Name	For example, John Doe
	Specifies the URL of the rich media.
Link	For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-
	b5YkMBq4ptA7jhg5/view
	Click the Pick Files button to choose and upload files from your com-
Rich Media	puter.
Object	

5. Click Save.

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 the 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 like to export the summary.

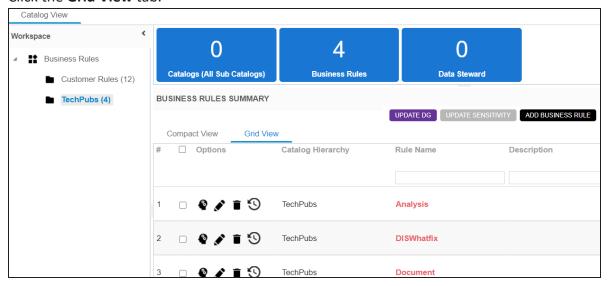
Managing Business Rules

Managing business rules involves:

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

To manage business rules, follow these steps:

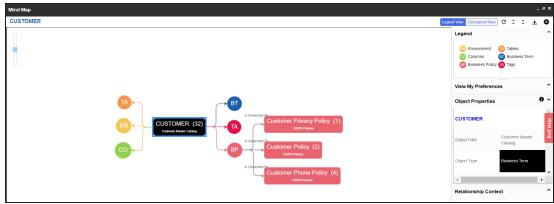
1. Click the Grid View tab.



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 term, its associations, relationships, sensitivity, and more in a logical and conceptual view.



Use the following options to work on the mind map:

Reload Diagram (C)

Use this option to reload the mind map.

Expand Diagram (\$\hat{\circ}\$)

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

Reset Diagram to Original View (X)

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

Export (±)

Use this option to export the mind map. Hover over **Export** and use the following options:

Mind Map - Excel Report: Use this option to download the mind map in the .xlsx format. Ensure that you expand the mind map before downloading the report.

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.

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.

For more information on mind maps, 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 (1)

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.

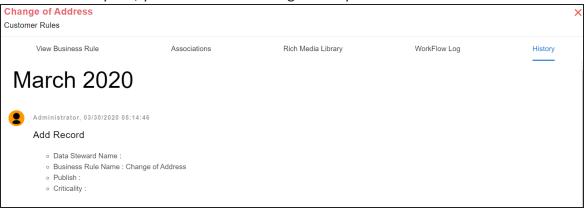
Viewing History

You can view and track a list of changes for a business rule. The History tab displays change status, added records, and more.

To view the history of a business rule, follow these steps:

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

From the History tab, you can view the change history related to a business rule.



Viewing Mind Maps

A mind map displays the pictorial representation of a business asset and its association with other assets.

You can see Mind Maps in different views:

- Logical View
- Conceptual View

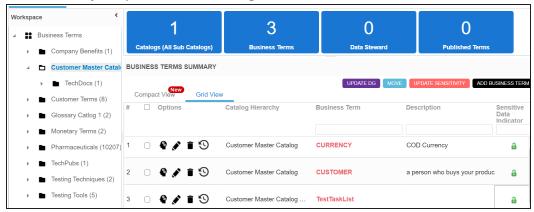
You can select an asset on a mind map and view its properties, association statistics, and sensitivity under the Object Properties pane.

To view mind maps, follow these steps.

1. In the **Business Assets** pane, click a business asset.

The Workspace displays a list of catalogs related to the asset. For example, if you select Business Terms in the Business Asset pane, the Workspace switches to the Business Terms Summary view.

2. In the Workspace pane, click a catalog.

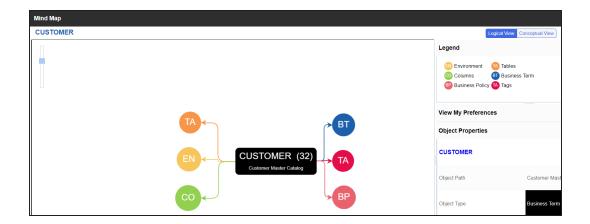


- 3. From the **Business Asset Summary** section, click for a business asset. The Mind Map page appears.
- 4. From the Mind Map page, you can switch click **Logical View** or **Conceptual View** to switch between them.

For more information on views, see the list below:

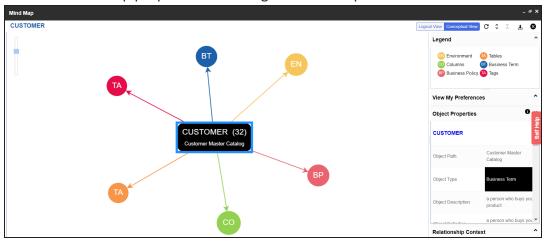
Logical View

Displays the associated technical assets on the left side and associated business assets on the right of the business asset. Also, view Mind Map properties on the right-hand side pane.



Conceptual View

Displays the associated technical assets in non-hierarchical representation. Also, view the Mind Map properties on the right-hand side pane.



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

Reload Diagram (C)

Use this option to reload the mind map.

Expand Diagram (🗘)

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

Reset Diagram to Original View (X)

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

Export (±)

Use this option to export the mind map. Hover over **Export** and use the following options:

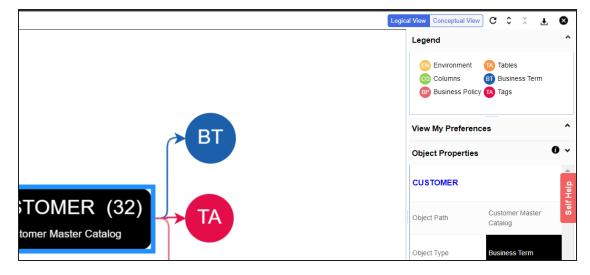
Mind Map - Excel Report: Use this option to download the mind map in the .xlsx format. Ensure that you expand the mind map before downloading the report.

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.

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.

Legend

Use the legends to identify the list of components in a mind map.



View My Preferences

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

Asset Hierarchy

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.

Association Statistics

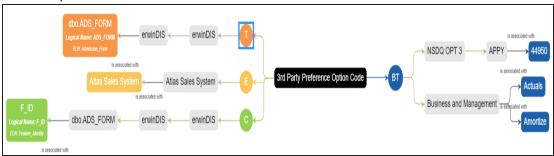
Select the **Show Counts** check box to view the number of associations for a business asset.

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 <u>Business Glossary Manager Settings</u>.

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.



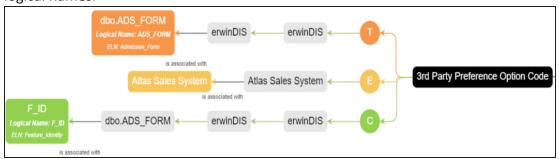
View Logical Names

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 the 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 <u>tables</u> 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 for the mind map:

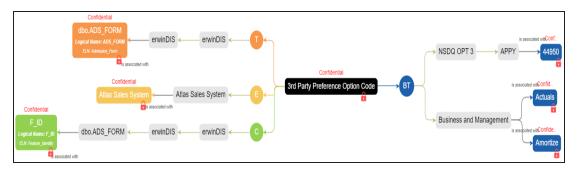
- Sensitivity Data Indicator(Y/N):
 Use this option to enable/disable to view the sensitive assets on the mind map.
- Sensitive Data Classification:

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 (for items that are classified sensitive.

For more information on updating the asset's sensitivity in a mind map, refer to

the Updating Sensitivity topic.



Filter

Use the filter options to sort the components of mind map. Expand the **Filter** pane, and use the following options:

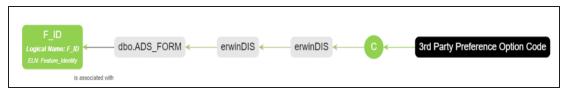
By Asset Type:

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 relationships shown in the mind map.



Object Properties

Click the asset's Object Properties to view its association statistics and sensitivity properties of an asset. Asset properties will differ for technical and business assets.

Relationship Context

Click the asset's Relationship Context to view its relationship with the associated business assets.

Overview

Use this open to see the mind map in an expanded pan view. You can navigate across the mind map to view it.

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 <u>Configuring Asset Details</u> 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 <u>Configuring Sensitivity Update Notifications</u> 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.

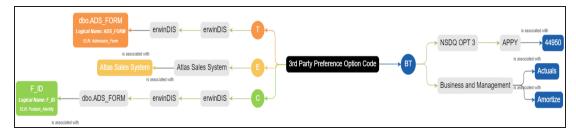
Selected Asset

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

To update sensitivity of an asset, follow these steps:

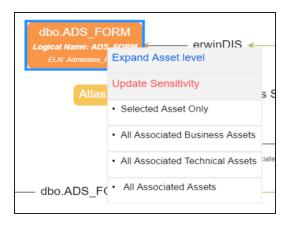
1. On the mind map, click Expand All.

The mind map appears in its expanded form.



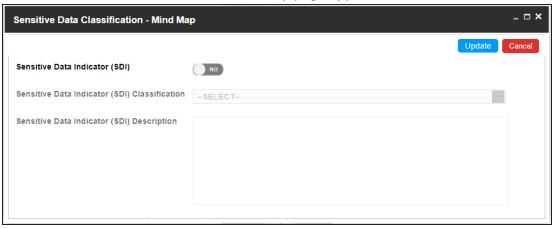
2. Right-click the required asset.

The options available for the asset appear.



3. Click Selected Asset Only.

The Sensitive Data Classification - Mind Map page appears.



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

Field Name	Description
Sensitive Data	Specifies whether the selected asset is sensitive.
Indicator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to YES to mark the asset as
Flag	sensitive.
	Specifies the SDI classification of the selected asset.
Sensitive Data Indicator (SDI) Classification	For example, PHI.
	This list is enabled when Sensitive Data Indicator (SDI) Flag is
	switched to YES. For more information on configuring SDI clas-
	sifications, 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.

5. Click Update.

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

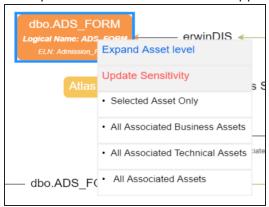
Associated Assets

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:

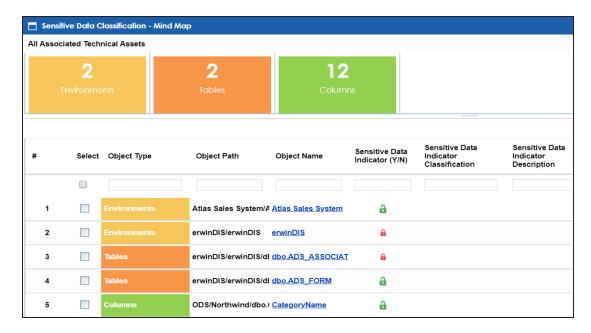
1. On the mind map, right-click the required asset.

The options available for the asset appear.



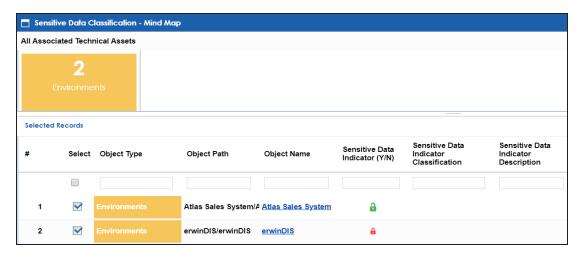
- 2. Click any one of the following:
 - All Associated Business Assets: Use this option to update sensitivity of associated business assets.
 - All Associated Technical Assets: Use this option to update sensitivity of associated technical assets.
 - All Associated Assets: Use this option to update sensitivity of associated business and technical assets.

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



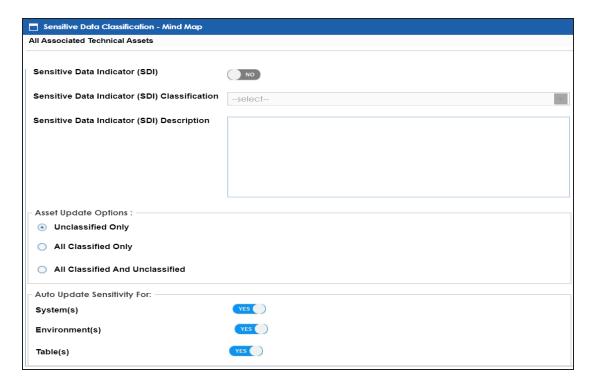
3. Select the required assets and click Next.

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 <u>table above</u> for field descriptions.
- 6. Click Update.

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

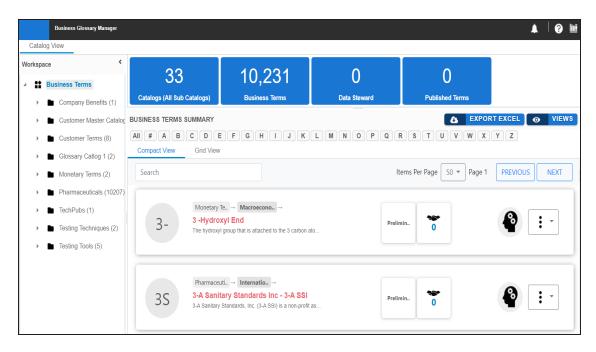
Grid View

You can view a 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:

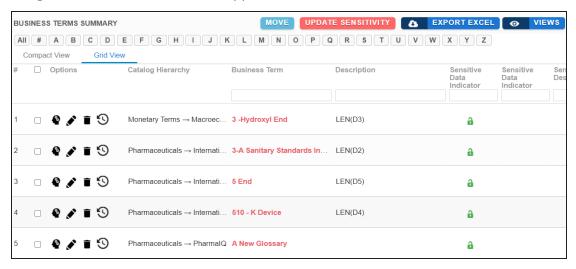
1. In the browser pane, click a <Business_Asset_Name>.

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. See the below image for an example of the grid view for Business Terms appears.

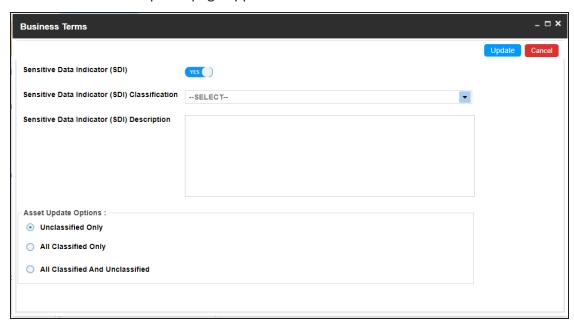


3. Select the required business assets.

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

4. Click **Update Sensitivity**.

The Business Terms update page appears.



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

Field Name	Description
Sensitive Data	Specifies whether the selected assets are sensitive.
Indicator (SDI)	Switch Sensitive Data Indicator (SDI) Flag to YES to mark the assets
Flag	as sensitive.
	Specifies the SDI classification of the selected assets.
Sensitive Data	For example, PHI.
Indicator (SDI) Classification	This list is enabled when Sensitive Data Indicator (SDI) Flag is
	switched to YES. For more information on configuring SDI clas-
	sifications, 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	Specifies whether sensitivity applies to:

Field Name	Description
Options	 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.

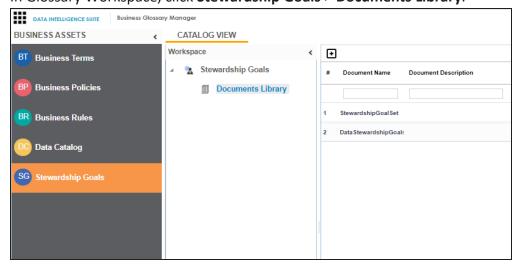
Sensitivity of the business assets is updated.

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.

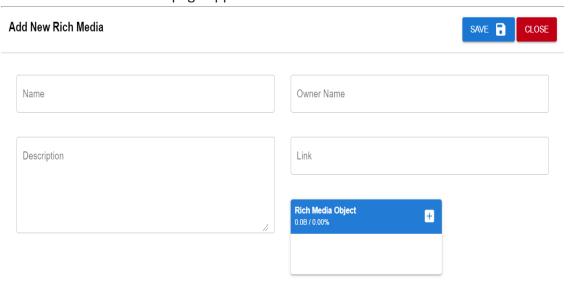
To set up stewardship goals, follow these steps:

- 1. Go to Application Menu > Data Literacy > Business Glossary Manager.
- 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.
ment Name	For example, ABCL Goal Details.
System Docu- ment Object	Drag and drop document files or use to select and upload document files.
System Docu-	Specifies the document owner's name.
ment Owner	For example, John Doe.
	Specifies the URL of the document.
Document Link	For example, https://drive.google.com/file/I/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	Specifies whether the document requires approval.

Field Name	Description
Required Flag	Select the Approval Required Flag check box to select the document
Required Flag	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. <u>Managing stewardship goals</u> 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.



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.

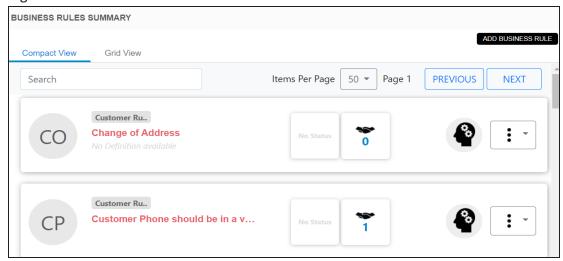
Updating Data Governance

You can update data governance and assign governance responsibilities for business assets to users. The user-list appears as pick list values based on the roles group. Ensure that you assign appropriate roles and users to the catalog containing the business assets.

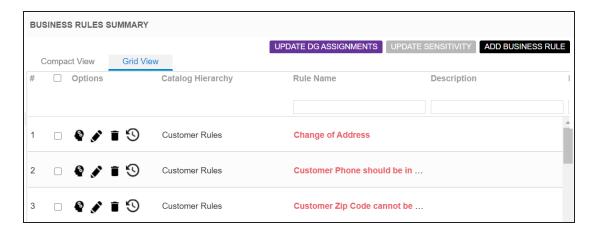
To update data governance, follow these steps:

- 1. Go to Application Menu > Data Literacy > Business Glossary Manager.
- In the Business Assets pane, click a business asset.
 The Workspace displays a list of catalogs related to the asset. For example, if you click Business Rules, the Workspace switches to the Business Rules Summary view.
- 3. In the Workspace pane, click a catalog.

By default, the Compact View tab appears. It displays the business assets in the catalog.



4. Click the Grid View tab.

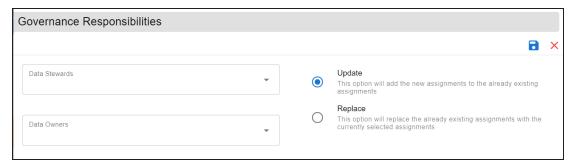


5. Select required business assets.

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

6. Click **Update DG Assignments**.

The Governance Responsibilities page appears. It displays roles groups based on the roles and users assigned to the Catalog.



- 7. Select the required users for each roles group.
- 8. On the **Governance Responsibilities** page, use the following options:

Update

Use this option to add new assignments.

Replace

Use this option to replace existing assignments.

9. Click .

The data governance is updated.