Informatica PowerCenter (Version 9.1.0 HotFix1)

Metadata Manager Business Glossary Guide
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Preface

The Metadata Manager Business Glossary Guide is written for data stewards, data analysts, data owners, and business analysts who manage a business glossary in Metadata Manager and administrators who maintain the Metadata Manager application. It contains information you need to create and manage business glossaries and relate the information in a business glossary to technical metadata in the Metadata Manager warehouse.

The Metadata Manager Business Glossary Guide assumes you have a working knowledge of the data and metadata for your organization and basic Metadata Manager concepts.

Informatica Resources

Informatica Customer Portal

As an Informatica customer, you can access the Informatica Customer Portal site at http://mysupport.informatica.com. The site contains product information, user group information, newsletters, access to the Informatica customer support case management system (ATLAS), the Informatica How-To Library, the Informatica Knowledge Base, the Informatica Multimedia Knowledge Base, Informatica Product Documentation, and access to the Informatica user community.

Informatica Documentation

The Informatica Documentation team takes every effort to create accurate, usable documentation. If you have questions, comments, or ideas about this documentation, contact the Informatica Documentation team through email at info_documentation@informatica.com. We will use your feedback to improve our documentation. Let us know if we can contact you regarding your comments.

The Documentation team updates documentation as needed. To get the latest documentation for your product, navigate to Product Documentation from http://mysupport.informatica.com.

Informatica Web Site

You can access the Informatica corporate web site at http://www.informatica.com. The site contains information about Informatica, its background, upcoming events, and sales offices. You will also find product and partner information. The services area of the site includes important information about technical support, training and education, and implementation services.
Informatica How-To Library

As an Informatica customer, you can access the Informatica How-To Library at http://mysupport.informatica.com. The How-To Library is a collection of resources to help you learn more about Informatica products and features. It includes articles and interactive demonstrations that provide solutions to common problems, compare features and behaviors, and guide you through performing specific real-world tasks.

Informatica Knowledge Base

As an Informatica customer, you can access the Informatica Knowledge Base at http://mysupport.informatica.com. Use the Knowledge Base to search for documented solutions to known technical issues about Informatica products. You can also find answers to frequently asked questions, technical white papers, and technical tips. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team through email at KB_Feedback@informatica.com.

Informatica Multimedia Knowledge Base

As an Informatica customer, you can access the Informatica Multimedia Knowledge Base at http://mysupport.informatica.com. The Multimedia Knowledge Base is a collection of instructional multimedia files that help you learn about common concepts and guide you through performing specific tasks. If you have questions, comments, or ideas about the Multimedia Knowledge Base, contact the Informatica Knowledge Base team through email at KB_Feedback@informatica.com.

Informatica Global Customer Support

You can contact a Customer Support Center by telephone or through the Online Support. Online Support requires a user name and password. You can request a user name and password at http://mysupport.informatica.com.

Use the following telephone numbers to contact Informatica Global Customer Support:

<table>
<thead>
<tr>
<th>North America / South America</th>
<th>Europe / Middle East / Africa</th>
<th>Asia / Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Toll Free</strong></td>
<td><strong>Toll Free</strong></td>
<td><strong>Toll Free</strong></td>
</tr>
<tr>
<td>Brazil: 0800 891 0202</td>
<td>France: 00800 4632 4357</td>
<td>Australia: 1 800 151 830</td>
</tr>
<tr>
<td>Mexico: 001 888 209 8853</td>
<td>Germany: 00800 4632 4357</td>
<td>New Zealand: 1 800 151 830</td>
</tr>
<tr>
<td>North America: +1 877 463 2435</td>
<td>Israel: 00800 4632 4357</td>
<td>Singapore: 001 800 4632 4357</td>
</tr>
<tr>
<td><strong>Standard Rate</strong></td>
<td><strong>Standard Rate</strong></td>
<td><strong>Standard Rate</strong></td>
</tr>
<tr>
<td>North America: +1 650 653 6332</td>
<td>Spain: 900 813 166</td>
<td>India: +91 80 4112 5738</td>
</tr>
</tbody>
</table>

| **Toll Free**                 | **Standard Rate**             |
| France: 0805 804632          | United Kingdom: 00800 4632 4357 or 0800 023 4632 |
| Germany: 01805 702702        |
| Netherlands: 030 6022 797    |
Chapter 1

Understanding the Business Glossary

This chapter includes the following topics:

- Understanding the Business Glossary Overview, 1
- Business Glossary Model, 2
- Business Glossary Process, 3
- Logging in to Metadata Manager, 5

Understanding the Business Glossary Overview

The business glossary is a set of terms that use business language to define relevant concepts for business users in an organization. A business term includes the business definition and usage of a concept. It also includes rules and valid values for data. Business terms can be organized by category. Categories can contain sub-categories. A Metadata Manager instance can contain multiple glossaries.

Organizations typically maintain business terms and definitions in multiple locations, and the terms are not consistently defined. It is difficult to relate the terms to the metadata they represent.

Business glossary users can maintain business definitions in a central location. They can standardize definitions, rules, and valid values for metadata across the organization. Users can easily relate the business terms with the technical metadata in the Metadata Manager catalog that the terms represent.

Business Glossary Tasks

Use Metadata Manager to perform the following tasks with a business glossary:

- Create a business glossary.
- Define and create business terms and categories.
- Define rules, usage, data stewards, and owners for business terms.
- Relate business terms to technical metadata and other business terms.
- Define and view valid values for the data that a business term represents.
- Propose business terms and then publish them to a wider audience.
- View the impact summary to view objects that impact and are impacted by objects related to the business term.
- Browse and search a business glossary and the related metadata.
Perform data lineage analysis to determine how metadata for a business term is derived.
View audit trails for business terms and categories.

Business Glossary Interface

Use the Glossary view in Metadata Manager to manage the business glossary. Use the navigator in the left pane to manage categories and business terms and navigate business glossaries. Use the Details section in the right pane to view and edit details for categories and business terms.

Business Glossary Model

The business glossary model defines the structure of a business glossary and the properties for each category and business term. The model includes classes for categories and business terms. You can view the business glossary model on the Model page in Metadata Manager.

The business glossary model has the following structure:

- BusinessGlossary
  - Category
    - BusinessTerm
  - Category
  - BusinessTerm

Use the business glossary model to create a business glossary with a tree structure. Create categories and subcategories. Create business terms at any level of the business glossary hierarchy. You can create relationships between business terms, metadata objects in the catalog, and other business terms. You can also create a relationship to add a business term to multiple categories. The categories can be located in multiple glossaries.

You can modify the business glossary model to add properties and relationships to the category and business term classes, or create a model based on the business glossary model. You can add classes to create other metadata object types. You cannot remove the existing properties or relationships that define the model.

Related Topics:
- “Modifying the Business Glossary Model” on page 34

Category Class

The Category class contains properties for category name, description, usage context, data steward, and owner. It contains relationships to all other Category and BusinessTerm classes. A category can be related to other category or business term objects in a business glossary. You can create a category in multiple glossaries.

The Category class is defined by the following properties:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name for the category.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the category.</td>
</tr>
</tbody>
</table>
### BusinessTerm Class

The BusinessTerm class contains properties for name, description, usage context, data steward, and owner. It contains relationships to all other Category and BusinessTerm classes. A business term can be related to other category or business terms in a business glossary. You can create a business term in multiple glossaries.

The BusinessTerm class is defined by the following properties:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name for the business term.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the business term.</td>
</tr>
<tr>
<td>Usage Context</td>
<td>Business context in which the category is used.</td>
</tr>
<tr>
<td>Reference Table</td>
<td>Link to a reference table that contains valid values for the business term data.</td>
</tr>
<tr>
<td>Rule</td>
<td>Describes how the value of the business term is derived.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the business term. The status can be one of the following values:</td>
</tr>
<tr>
<td></td>
<td>- Proposed</td>
</tr>
<tr>
<td></td>
<td>- Approved</td>
</tr>
<tr>
<td></td>
<td>- Standard</td>
</tr>
<tr>
<td></td>
<td>- Deprecated</td>
</tr>
<tr>
<td>Data Steward</td>
<td>Metadata Manager user who creates and maintains the business term in the business glossary. This property requires a user account in the Metadata Manager application.</td>
</tr>
<tr>
<td>Owner</td>
<td>Metadata Manager user who defines the business term for the organization. This property requires a user account in the Metadata Manager application.</td>
</tr>
</tbody>
</table>

### Business Glossary Process

To work with the business glossary, you create the glossary resource, categories, and business terms. You can create relationships between the business terms and the metadata that the business terms represent. After you create the business glossary, you can browse and maintain the business glossary.

The following users interact to manage a business glossary:

- **Data stewards.** Create categories and business terms, define rules, and determine valid values for business term data. Data stewards may work with subject matter experts and data owners to complete tasks.
Business analysts. Determine the business terms and rules that are needed for a project and define rules.

Data analysts. Define rules and create relationships between business terms and categories and the technical metadata. Data analysts can include data modelers and data architects.

Data owners. Own definitions and rules for categories and business terms.

Administrators. Maintain the Metadata Manager instance.

Note: Before you log in to Metadata Manager and work with the business glossary, the administrator must create user accounts, configure user privileges, and configure permissions on business glossaries.

Creating and Publishing a Business Glossary

To create and publish a business glossary, complete the following steps:

1. Determine business requirements. Determine the business concepts to document in the business glossary. Determine the required categories and business terms.
2. Create the business glossary resource. Create the business glossary resource in Metadata Manager.
3. Create categories and business terms. Create the categories and business terms in Metadata Manager. Configure the properties for categories and business terms.
4. Edit categories and business terms. Edit properties, link to reference tables for valid values, and create relationships between categories, business terms, and metadata objects.
5. Propose business terms for review. Enable data stewards and data owners to review the business terms.
6. Review the business terms. Data stewards and owners can review the business terms and enter any comments or edits as necessary.
7. Publish the business terms. Publish the business terms to make them available to all business glossary users.

Related Topics:

• “Creating and Publishing a Business Glossary” on page 7

Browsing the Business Glossary

You can perform the following tasks when you browse a business glossary:

• Browse categories and business terms. Browse the Glossary view to view categories and business terms in a business glossary.
• View the related metadata in the metadata catalog. View the metadata objects that the categories and business terms represent.
• View reference table values. Open a reference table and view the valid values for the data that a business term represents.
• Add business terms to categories. Organize the business glossary and add business terms to categories.
• Create relationships for related terms. Create relationships between related business terms.
• View the impact summary. View the impact summary to view objects that impact and are impacted by objects related to the business term.
• View business term and category definitions. View the definitions of business terms and categories.
• View audit trails. View the history of changes in a business glossary.
Managing the Business Glossary

You can perform the following tasks to manage a business glossary:

- **Migrate a business glossary.** Export a business glossary from one Metadata Manager instance to a Microsoft Excel file and import it into another instance. You can also create a business glossary in Microsoft Excel and import it.

- **Modify the business glossary model.** Add properties for categories and business terms or add metadata object types.

- **Set up remote access through the URL API.** Access details for business glossary categories and business terms from third-party applications.

**RELATED TOPICS:**
- “Managing the Business Glossary” on page 26

Logging in to Metadata Manager

You must have a user account to log in to Metadata Manager. When you log in to Metadata Manager, it creates a cookie. You can change your password after you log in.

**Note:** If you access Metadata Manager from Informatica Administrator, Metadata Manager logs you in to Metadata Manager using the user name and password you used to log in to Informatica Administrator.

To log in to Metadata Manager:

1. Open Microsoft Internet Explorer or Mozilla Firefox.
2. In the Address field, enter the following URL for the Metadata Manager login page:
   http(s):/<host>:<port>/mm
   In the URL, <host>:<port> represents the host name and port number of the machine that runs the Metadata Manager application.
   If the node is configured for HTTPS with a keystore that uses a self-signed certificate, a warning message appears. To enter the site, accept the certificate.
   The Informatica Metadata Manager and Business Glossary login page appears.
3. Enter the user name and password.
4. Select Native or the name of a specific security domain.
   The Security Domain field appears when the Informatica domain contains an LDAP security domain. If you do not know the security domain that your user account belongs to, contact the Informatica domain administrator.
5. Click Login.
   If this is the first time you log in with the user name and password provided by the Informatica domain administrator or Metadata Manager administrator, change your password to maintain security.
Cookies

When you log in to Metadata Manager, the PowerCenter Service Manager creates a cookie that it uses to authenticate your user name in Metadata Manager. If you access Metadata Manager again before the cookie expires, the Service Manager uses the authentication information in the cookie to log you in to Metadata Manager. You must have cookies enabled in your browser for the Service Manager to create the cookie.

If the browser session is inactive for 12 hours or you log out of Metadata Manager, the Service Manager deletes the cookie. You can increase the timeout for the cookie in the Metadata Manager imm.properties file by setting the Session.timeOut property to a value from 30 through 43,200 minutes.

Changing a Password

You can change an account password for Metadata Manager. Passwords can be up to 80 characters.

To change your password:

1. Click Manage > Account Settings in Metadata Manager.
   The Account Settings window appears.
2. Enter the old password.
   Passwords can be up to 80 characters.
3. Enter a new password and confirm the new password.
4. Click OK.
Creating and Publishing a Business Glossary Overview

When you create a business glossary, you define the categories and terms for relevant concepts for business users in an organization.

You create the categories and business terms, edit the category and business term properties, and define valid values for business terms. You can also create relationships between categories and terms and the metadata in the metadata catalog that they represent.

When you create or edit a business term, you can add hyperlinks to any other business term in the same or different business glossary. You can also provide links to external web pages as a reference to a business term. These internal and external links help you to browse through related business terms in the business glossary.

Metadata Manager includes an approval process for defining and approving business terms before publishing them to all business glossary users. Business analysts, data stewards, and data owners work together to create categories and business terms. They agree on the business language, including definitions and rules that define the term, before they make the categories and terms available to all users of the business glossary. You can assign data stewards and owners for categories and terms when you create them.

The approval process includes three phases for a term:

- Draft. Indicates that the term is being created or edited but is not yet ready for review. By default, any term that you create starts in draft phase.
- Under Review. Indicates that the term is ready for review. The data stewards assigned to the term review the term.
• Published. Indicates that the term has been approved by the data stewards. Any business glossary user can view the category or term.

The approval process sends an email notifying users when a data steward proposes a draft business term for review or when a user adds comments to a business term.

Use the following process to create business glossary categories and terms and publish business terms:

1. Create the business glossary resource.
2. Create the categories and terms.
3. Edit the category and term properties, define valid values for business terms with reference tables, and create relationships.
4. Propose business terms for review.
5. Review the business terms and enter comments.
6. Publish the business terms.

**Category Properties**

You configure the category properties when you create the category. You can also edit the category to configure the properties after you create it.

The following table describes the properties that you configure for categories:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name for the category.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the category.</td>
</tr>
<tr>
<td>Usage Context</td>
<td>Business context in which the category is used. You can enter any text that describes the business context. For example, you create multiple categories that contain terms related to sales revenue for a division. You use the terms at different times during a quarter. The usage context defines when the terms in the category are applicable.</td>
</tr>
<tr>
<td>Data Steward</td>
<td>Metadata Manager user who creates and maintains the category in the business glossary. You can assign a single data steward or a group of users who are data stewards.</td>
</tr>
<tr>
<td>Owner</td>
<td>Metadata Manager user who defines the category for the organization.</td>
</tr>
</tbody>
</table>

**Business Term Properties**

You configure the business term properties when you create the term. You can also edit the term to configure the properties after you create it.

The following table describes the properties that you configure for business terms:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name for the business term.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the business term.</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Usage Context</td>
<td>Business context in which the business term is used. You can enter any text that describes the business context. For example, during a data migration project, you require multiple terms that define the customer information, and you use each term in a different context. Use this property to define when to use each set of customer information.</td>
</tr>
</tbody>
</table>
| Rule           | Describes how the value of the business term is derived. You can enter any text that describes how the value is derived. For example, sales revenue for a customer equals total purchase orders minus purchase orders not yet paid. You create the following business terms that describe each number:  
|                | - FINAL_SALES  
|                | - TOTAL_PO  
|                | - PAID_PO  
|                | Use the following rule to define how the final sales numbers for a customer are derived:  
|                | FINAL_SALES = TOTAL_PO - PAID_PO |
| Status         | Status of the business term in the business term life cycle. The status can be one of the following values:  
|                | - Proposed  
|                | - Approved  
|                | - Standard  
|                | - Deprecated |
| Data Steward    | Metadata Manager user who creates and maintains the business term in the business glossary. You can assign a single data steward or a group of users who are data stewards. |
| Owner          | Metadata Manager user who owns the business term for the organization. |
| Phase          | Indicates the phase of the business term in the approval workflow. A business term can have one of the following phases:  
|                | - Draft. Indicates that the term is being created or edited but is not yet ready for review. By default, any term that you create starts in draft phase.  
|                | - Under Review. Indicates that the term is ready for review. The data stewards assigned to the term review the term.  
|                | - Published. Indicates that the term has been approved by the data steward. Any business glossary user can view the category or term.  
|                | **Note:** You cannot edit this field. |

**Internal and External Hyperlinks**

When you create or edit a business term, you can add hyperlinks to any other business term in the same or different business glossary. You can also provide links to external web pages as a reference to a business term. These internal and external links help you to browse through related business terms in the business glossary.

To provide internal links from the current business term to other business terms, click and drag those business terms to the Description, Rule, Usage fields, or any custom field of datatype LongString associated with the current business term. The referenced business term appears as a hyperlink.

You can provide external links using the following syntax:

[link="www.dummylink.com"]anchor text[/link].

For a business term, you can provide multiple links and a combination of internal and external links.
Email Notifications

Metadata Manager sends email notifications during the business term approval process.

Metadata Manager sends an email notifying users about the following events:

- A data steward proposes a draft business term for review. Metadata Manager displays the email options so that the data steward can send an email to other users.
- A user adds a comment to a business term in any phase. Metadata Manager sends an email to the data steward assigned to the term.

Metadata Manager does not send an email if these events occur when you import a business glossary from a Microsoft Excel file or an XML file.

You can configure email properties when you propose a business term for review. The following table describes the email properties that you can configure:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>Email address of recipients. Separate multiple email addresses with commas.</td>
</tr>
<tr>
<td>Cc</td>
<td>Email address of recipients that you want to receive a carbon copy of the email. Separate multiple email addresses with commas. Metadata Manager adds the email address of the data steward. If the data steward is a group, Metadata Manager adds the email addresses of all members of the group.</td>
</tr>
<tr>
<td>Subject</td>
<td>Subject of the email. Default is the following text: Please review business term &lt;business_term_name&gt;</td>
</tr>
<tr>
<td>From</td>
<td>Email address of the sender. If the sender does not have an email address in the system, Metadata Manager uses the default non-reply email address.</td>
</tr>
<tr>
<td>Attachment</td>
<td>Additional files to attach to the email. Click Add files and select the files to add. You can include up to three attachments with a total size of 2 MB.</td>
</tr>
<tr>
<td>Select a File Format</td>
<td>Type of file that you want to attach.</td>
</tr>
<tr>
<td>Select Items to be Included</td>
<td>Objects to send in the email. Select one of the following options:</td>
</tr>
<tr>
<td></td>
<td>- Selected item. Send email with the business term that you selected.</td>
</tr>
<tr>
<td></td>
<td>- Selected item and its sub-items. Send email with the business term that you selected and its child objects.</td>
</tr>
<tr>
<td>Select Information to be Included with Each Item</td>
<td>Information to include in the email for each object.</td>
</tr>
<tr>
<td>Message Text</td>
<td>Message text to include in the email. Default text includes the URL to the business term.</td>
</tr>
</tbody>
</table>

You cannot configure email properties when you add a comment to a business term. Metadata Manager automatically sends an email to the data steward assigned to the term. If a term in the Draft phase does not have an assigned data steward, Metadata Manager does not send an email. If the data steward is a group, Metadata Manager sends an email to all users in the group. The email contains the following information:

- The subject includes the following text:
  User <user_name> added comment to business term <business_term_name>.
- The from address includes the email address of the user that added the comment. If the user account does not have an email address, the from address includes the non-reply email address.
- The message text includes the URL to the business term and the added comment.
Before You Send Email

Before Metadata Manager can send email notifications, you must complete the following tasks:

- Use the Domain tab of Informatica Administrator to configure the host name and port number of the outgoing mail server. Configure the mail server host name and port number in the SMTP settings for the domain. Metadata Manager sends email to email addresses that are registered under this mail server.
  
  For more information about configuring domain SMTP settings, see the Informatica Administrator Guide.

- Use the Security tab of Informatica Administrator to enter email addresses for data stewards so that they can receive emails when a user adds a comment to a business term.
  
  For more information about managing user accounts, see the Informatica Administrator Guide.

- Configure the non-reply email address in the imm.properties file.
  
  For more information about configuring the imm.properties file, see the Metadata Manager Administrator Guide.

Rules and Guidelines for Creating a Business Glossary

Use the following rules and guidelines when creating and publishing business glossary categories and business terms.

- The privileges and permissions for business glossary users determine who can view and edit categories and terms at any phase in the process, including proposing and publishing terms. For example, until a business term is published, only the creator and data steward can view the business term by default.
  
  For more information about privileges, see the Informatica Administrator Guide. For more information about permissions, see the Metadata Manager Administrator Guide.

- After you publish a business term, you cannot set it back to draft or proposed phase. Use the Status property to indicate if a term is no longer in use. Optionally, you can delete the term and recreate it.

Creating a Business Glossary Resource

Each business glossary in Metadata Manager is defined by a business glossary resource. Create the business glossary resource in the Glossary view on the Metadata Manager Browse page.

When you create a business glossary resource, select the model for the business glossary. By default, this model is named BusinessGlossary and contains the Category and BusinessTerm classes. You can select the BusinessGlossary model or a custom model based on the BusinessGlossary model.

Create multiple business glossary resources based on your business requirements. For example, you can create a business glossary that contains terms related to company sales metadata and one that contains business terms related to customer metadata.

To create a business glossary resource:

1. On the Browse page in Metadata Manager, select the Glossary view.
2. Click Actions > New > Glossary or right-click and select New > Glossary.
   
   The Create Glossary window appears.
3. In the left pane, select the model that you want to use.
   
   The left pane displays the BusinessGlossary model and all models based on the BusinessGlossary model. The Preview of Model Hierarchy section shows the model classes that you can create objects for.
4. Enter the name and description for the business glossary.
Creating Categories and Business Terms

Create categories on the Categories view in the Glossary view.
Create business terms on the Categories or Alphabet views in the Glossary view. You can add business terms to the categories or you can add business terms without a category.

When you create categories and business terms, you specify the data steward and owner. Metadata Manager generates the list of users for the data steward and owner properties from the Metadata Manager users in the Informatica domain.

Note: The names of business terms and categories within a category must be unique.

Creating Categories

Use the Create Category window to create categories. You can create multiple categories at a time. You can browse through the categories before you create them.

1. From the Show list in the Glossary view, choose a business glossary.
2. To access the Categories view, click Actions > View > Categories.
3. Select the business glossary that you want to add the category to.
4. Click Actions > New > Category or right-click and select New > Category.
   The Create Category window appears.
5. Configure the category properties.
6. Click Add.
   Metadata Manager displays the category in the left pane.
7. Repeat these steps for each category you want to create.
8. Optionally, click the arrow icons to navigate between categories. You can modify the properties before you create the categories.
9. Optionally, to delete a category from the list, select the category and click Delete.
10. Click OK.
   Metadata Manager creates the categories. The categories appear in the Glossary view.

Creating Business Terms

Use the Create Business Term Objects window to create business terms. You can create multiple business terms at a time. You can browse through the business terms before you create them.

By default, after you create a term, the only business glossary users who can view the term are the user who created the term and the data steward or data steward group assigned to the term. In addition, any other user with the appropriate privileges and permissions, such as an administrator, can view or edit the term.
To create a business term:

1. From the Show list in the Glossary view, choose a business glossary.

2. To add a business term to a category, click Actions > View > Categories. Select the category that you want to add the business term to.
   Or, to add a business term without a category, click Actions > View > Alphabet.

3. Click Actions > New > Business Term or right-click and select New > Business Term.
   The Create Business Term window appears.

4. Configure the business term properties.

5. Click Add.
   Metadata Manager adds the business term to the Create Business Term window.

6. Create multiple business terms based your requirement.

7. Optionally, click the arrow icons to navigate between business terms. You can modify the properties before you create the business terms.

8. Optionally, to delete a business term from the list, select the business term and click Delete.

9. Click OK.
   Metadata Manager adds the business terms to the business glossary. You can also add business terms to categories.

**RELATED TOPICS:**
- “Adding Business Terms to Categories” on page 22

---

**Editing Categories and Business Terms**

After you create categories and business terms, you can edit them to modify the properties, define valid values with reference tables, and create relationships for the categories and business terms.

**Modifying Category and Business Term Properties**

You can modify properties for a category or business term or you can modify properties for multiple categories or terms.

To modify properties for a category or term:

1. From the Show list in the Glossary view, choose a business glossary or search for the category or business term.

2. Select the business term or category. You can use the shift or control keys to select multiple business terms.

3. Click Actions > Edit properties. For a single category or term, you can also click Edit under Properties in the Details section.
   The Edit Properties window appears.

4. Edit the category or business term properties. If you select multiple business terms, click the business term name in the left pane to edit the properties.

5. Click OK.
Linking Business Terms to Reference Tables

Create links between business terms and reference tables to view valid values for the data that a business term represents. Valid values are the values that business term data must contain.

You can associate a business term with a reference table name and a URL to the reference table. You can specify the following types of URLs:

- **Informatica Analyst URL.** You can include a URL to a reference table in Informatica Analyst. When you click the reference table URL, Metadata Manager launches Informatica Analyst. Your user account must be able to log in to Informatica Analyst and view reference tables.

- **Other URL.** You can include any valid URL to a reference table. When you click the reference table URL, Metadata Manager displays the reference table.

For example, as a business analyst, you create a report on a data warehouse that contains data migration results. You want to verify that the state value for the customer address contains valid values. You create a reference table in Informatica Analyst that describes the mapping between possible values for the state and the valid value. You associate the reference table URL to the business term that defines the customer information. You can view the business term in the glossary and click the reference table URL to view the reference table in Informatica Analyst.

**RELATED TOPICS:**
- “Viewing Reference Tables” on page 21

Creating a Link to a Reference Table

Edit the details of a business term to create a link between the business term and a reference table.

**Note:** If the reference table link includes a URL to Informatica Analyst, your Metadata Manager user account must also be able to log in to Informatica Analyst and view reference tables. Contact the Metadata Manager administrator to verify that you have the appropriate privileges in the Informatica domain.

To create a link to a reference table:

1. In the Glossary view, choose a business glossary.
2. Select a business term.
3. In the Details panel, click **Edit** under Reference Table.
   - The **Edit Properties** dialog box appears.
4. In the Reference Table field, enter a name for the reference table.
5. In the URL field, enter the URL to the reference table.
   - You can include variables in the URL using the following format: `${variable_name}`
   - You must define the variables in imm.properties.
6. Click **OK**.
   - If you included a URL, a link to the reference table appears under Reference Table.

Including Variables in a Reference Table URL

You can define variables in the imm.properties file and include the variables in reference table URLs.

Use a variable for the Informatica Analyst URL if you plan to migrate the business glossary from a development to a production environment. You can modify the Informatica Analyst URL in the variable instead of modifying the reference table URL for each business term in the glossary.
By default, imm.properties is in the following directory:

```
<Informatica installation directory>\tomcat\shared\classes
```

To include variables in a reference table URL:

1. Define a variable in imm.properties using the following format:
   
   `variable_name=variable_value`

   For example:
   
   `InformaticaAnalyst=http://<host>:<port>`

2. Disable and enable the Metadata Manager Service for the changes in imm.properties to take effect.

3. When you create a link from a business term to a reference table in Metadata Manager, include the variable in the reference table URL using the following format:
   
   `$$\{variable_name\}/remaining\_URL$`

   For example:
   
   `$$\{InformaticaAnalyst\}/AnalystTool/`

**Deleting a Link to a Reference Table**

To delete a link to a reference table:

1. In the Glossary view, choose a business glossary.
2. Select a business term.
3. In the Details panel, click **Delete** next to the reference table link under Reference Table.
4. Click **OK** to delete the link to the reference table.

**Creating Relationships**

To relate categories and business terms to technical metadata, create a relationship between a category or business term and a metadata object. Use the relationship to view the metadata that a category or business term represents.

For example, a business term represents sales metadata in a data warehouse. You can create a relationship from the business term to the metadata for the data warehouse where the sales metadata is located. You can then view the metadata objects that the business term represents.

You can create a relationship between the following objects:

- **Category or business term.** Create a relationship from a category or business term to a metadata object.
- **Metadata object.** Create a relationship from a metadata object to a category or business term. Select a metadata object and choose the category or business term.

**Relationships to PowerCenter Objects**

You can create a relationship between a business term and a PowerCenter object.
Some PowerCenter objects can be used in multiple contexts, used in a single context, or can refer to an original object. The information that a data lineage diagram displays depends on the following PowerCenter object types that you can associate to a business term:

- Reusable transformation or session. An object that you can use in multiple contexts.
  When you run data lineage analysis on the business term, the data lineage diagram displays the PowerCenter object and all instances of the object. However, when you view the details of the business term, the Related Catalog Objects section displays only the reusable PowerCenter object.
  When you run data lineage analysis on any instance of the PowerCenter object, the data lineage diagram displays the associated business term. However, when you view the details of an instance of the PowerCenter object, the Related Business Terms section does not display the business term.
  **Note:** If the reusable object is not used in another PowerCenter object, then the data lineage diagram does not display the relationship between the business term and the reusable object.

- Instance of a transformation or session. An instance of an object used in a single context.
  When you run data lineage analysis on the business term, the data lineage diagram displays the PowerCenter object instance within the context where the instance is used. For example, you relate a business term to a Lookup transformation instance. The data lineage diagram of the business term shows the Lookup transformation instance within its corresponding mapping and session context.

- Shortcut. A reference to an original object.
  When you run data lineage analysis on the business term, the diagram displays the instances of the original object and all instances of the shortcuts to the original object. However, when you view the details of the business term, the Related Catalog Objects section displays only the shortcut.

When you export and import the business glossary to XML or reload the PowerCenter resource, Metadata Manager creates or deletes associations based on changes made to the source. For example, you create a relationship between a business term and a reusable PowerCenter transformation that has one instance in a mapping. In the PowerCenter source, you add another instance of the transformation to a mapping. When you reload the PowerCenter resource, Metadata Manager associates the additional instance of the transformation to the business term.

### Creating Relationships to Categories and Business Terms
Create a relationship from a metadata object to a category or business term.

To create a relationship from a metadata object to a category or business term:

1. In the Catalog or Shortcuts view, select a metadata object.
2. In the Details section, click Edit under Related Terms.
   The Edit Related Terms window appears.
3. From the Show list in the Glossary view, choose the business glossary.
4. Drag the category or business term into the Edit Related Terms window.
5. To remove a relationship, select the business term in the Edit Related Terms window and click Remove.
6. Click OK.

### Creating Relationships to Metadata Objects
Create a relationship from a category or business term to a metadata object.

To create a relationship to a metadata object:

1. From the Show list in the Glossary view, choose a business glossary.
2. Select the category or business term.
3. In the Details section, click Edit under Related Catalog Objects. The Edit Related Catalog Objects window appears.
4. In the Catalog view, select a metadata object.
5. Drag the category or business term into the Edit Related Catalog Objects window.
6. To remove a relationship, select the metadata object in the Edit Related Catalog Objects window and click Remove.
   If a business term is related to a reusable PowerCenter object, you can delete the relationship to the reusable object. Metadata Manager removes the associations to all instances of the object. However, you cannot delete the relationship for a single instance of the object.
7. Click OK.

Deleting Categories and Business Terms

Delete an obsolete category or business term from a business glossary. When you delete a category, Metadata Manager deletes relationships between the category and metadata objects. Metadata Manager also deletes all business terms from the category. When you delete a business term, Metadata Manager deletes relationships between the business term and metadata objects.

**Note:** If you delete a business term, Metadata Manager also deletes the business term from any other glossary.

To delete a category or business term:
1. From the Show list in the Glossary view, choose a business glossary.
2. Select the business term or category.
3. Click Actions > Delete.
   Metadata Manager deletes the category or business term.

Proposing a Business Term for Review

Propose a business term for review by data stewards after you configure properties. Proposing a term changes the phase to Under Review and sends an email notification to other users.

You must select a data steward before you propose a term for review.

1. From the Show list in the Glossary view, choose a business glossary.
2. Select the term. You can use the shift or control keys to select multiple terms.
3. Click Actions > Propose or right-click on the term and select Propose.
   The Email window appears. Metadata Manager adds the email address of the data steward for the Cc property. You can enter additional email addresses for the To property.
4. Enter the email options and select the file format.
   You can change any of the default values.
5. Click Send.
   The email includes the URL to the business term.
Data stewards and other users that you added to the email properties receive an email notifying them that the business term is under review.
Reviewing a Business Term

Review a business term to verify that the properties for the term, including description, rules, and usage context are correct. You can add comments to the object while you review it.

Data stewards review business terms. If the steward approves the term, the steward can publish the term to make it available to all business glossary users.

1. Use the Glossary view to browse the business glossary and find the business term that you want to review.
2. Optionally, you can use the advanced search in the toolbar to find terms where you are the data steward or owner and the phase is Under Review.
3. Open the business term. You can open the term from the Glossary view or search results.
4. Review the business term properties.
5. To add comments, click Add in the Comments section. In the Add Comment window, add any comments about the term.

Metadata Manager sends the data steward assigned to the business term an email. The email contains the URL to the term and the added comment.

If you want to approve the business term, you can publish it. Otherwise, you can leave the term in the Under Review phase. The creator of the term can modify the term according to the comments.

Publishing a Business Term

Publish a business term to expose the business term to all business glossary users.

1. Use the Glossary view to browse the business glossary and find the business term that you want to publish.
2. Optionally, you can use the advanced search in the toolbar to find categories or terms where you are the data steward and the phase is Under Review.
3. Click Actions > Publish or right-click on the term and select Publish.
4. Optionally, you can edit the term to change the status of the term to Approved or Standard.
Browsing the Business Glossary Overview

Use the Glossary view to browse through the business glossaries in a Metadata Manager instance. You can browse categories and business terms. You can view business terms by category or by alphabetic order. Select any category or business term to view more information in the Details section. You can also view the contact number and email option if they are configured for the user. Move the pointer over the data steward or owner to view the contact number. Click the data steward or owner link to send an email using their email client application.

The following table describes the information in the Details section for categories and business terms:

<table>
<thead>
<tr>
<th>Area</th>
<th>Category/Business Term</th>
<th>Description</th>
</tr>
</thead>
</table>
| Properties | Category/Business Term | All properties for the category or business term. In addition to the properties you configure when you create the object, it includes the following additional properties:  
- Class. Class type of object. Object can be a Category or BusinessTerm class.  
- MM Creation Date. Date the object was created in Metadata Manager.  
- MM Update Date. Date the object was last updated in Metadata Manager.  
- Location. Location of the object in Metadata Manager. |
<p>| Categories | Business Term          | The categories to which a business term belongs. You can add business terms to more than one category.                                                                                                      |</p>
<table>
<thead>
<tr>
<th>Area</th>
<th>Category/Business Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related Terms</td>
<td>Business Term</td>
<td>Business terms related to the current business term. You can create relationships between business terms.</td>
</tr>
<tr>
<td>Reference Table</td>
<td>Business Term</td>
<td>Links to reference tables that contain valid or default values for a business term.</td>
</tr>
<tr>
<td>Links</td>
<td>Category/Business Term</td>
<td>Links to supporting documentation for the category or business term.</td>
</tr>
<tr>
<td>Comments</td>
<td>Category/Business Term</td>
<td>Comments made by Metadata Manager users about the category or business term. Use comments to share information about the object with other Metadata Manager users.</td>
</tr>
<tr>
<td>Related Catalog Objects</td>
<td>Category/Business Term</td>
<td>Metadata objects in the metadata catalog that the category or business term represents.</td>
</tr>
<tr>
<td>Impact Summary Downstream</td>
<td>Business Term</td>
<td>Metadata objects that are impacted by the objects related to the business term. In a data lineage diagram, these objects are downstream from the related object. If required, you can filter objects based on resource types.</td>
</tr>
<tr>
<td>Impact Summary Upstream</td>
<td>Business Term</td>
<td>Metadata objects that impact objects related to the business term. In a data lineage diagram, these objects are upstream from the related object. If required, you can filter objects based on resource types.</td>
</tr>
<tr>
<td>Audit Trail</td>
<td>Category/Business Term</td>
<td>The history of changes to a business term or category over time.</td>
</tr>
</tbody>
</table>

You can also perform the following tasks from the Glossary view:

- **Search for categories and business terms.** Search for categories and business terms by all properties or by properties that you choose.
- **Run data lineage analysis.** Run data lineage analysis to view where the metadata that categories and business terms represent appears in the metadata catalog. You can also export a data lineage diagram.

For example, you want to see if metadata that a business term represents is used properly in reports or if the value for the term is calculated properly. You can run data lineage analysis on the business term and view metadata that the term represents.

**RELATED TOPICS:**

- "Adding Business Terms to Categories" on page 22
- "Creating Relationships Between Business Terms" on page 22
- "Viewing Reference Tables" on page 21
- "Viewing Related Metadata Objects" on page 21

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**Browsing the Glossary View**

Browse the Glossary view to view categories and business terms in a business glossary.
To browse the Glossary view:
1. Select the Glossary view in Metadata Manager.
2. From the Show list, choose a business glossary.
3. To view business terms grouped by category, click Actions > View > Categories.
4. To view all business terms in a business glossary in alphabetic order, click Actions > View > Alphabet.
5. To view all business terms that start with a specific letter, click the letter.

**Viewing Related Metadata Objects**

Categories and business terms represent metadata objects in the Metadata Manager catalog. You can view the metadata object that a category or business term represents. You can find the metadata object in the metadata catalog.

To view related metadata objects:
1. From the Show list in the Glossary view, choose a business glossary.
2. Select the category or business term.
3. Under Related Catalog Objects in the Details section, click the link for the related metadata object.
   Metadata Manager switches to the Catalog view, displays the metadata object in the catalog hierarchy, and displays the details about the metadata object.

**Viewing Reference Tables**

You can view reference tables for a business term.

For example, a business term that represents customer information has a link to an Informatica Analyst reference table that displays valid values for the customer address. You can launch Informatica Analyst from Metadata Manager and view the reference table to view the valid values for the customer address.

**Note:** If you view an Informatica Analyst reference table, your Metadata Manager user account must also be able to log in to Informatica Analyst and view reference tables. Contact the Metadata Manager administrator to verify that you have the appropriate privileges in the Informatica domain.

To view a reference table:
1. In the Glossary view, choose a business glossary.
2. Select the business term.
3. In the Details panel, click the link for the reference table under Reference Table.
   Metadata Manager opens a browser window to display the reference table.
Adding Business Terms to Categories

Business terms can belong to more than one category. After you create a business term, you can edit the business term and add it to other categories. You can add the business term to a category from the same business glossary.

To add a business term to multiple categories:

1. From the Show list in the Glossary view, choose a business glossary.
2. Select the business term.
3. Click Edit in the Details section under Categories.
   The Edit Related Categories window appears.
4. Browse the business glossary and find the category that you want to add.
5. Drag the category into the Edit Related Categories window.
6. Click OK.

Creating Relationships Between Business Terms

You can create relationships between different business terms. For example, the rule for a business term includes other business terms. You can create relationships between the business term and the business terms included in the rule.

To create a relationship between business terms:

1. From the Show list in the Glossary view, choose a business glossary.
2. In the Details section, click Edit under Related Terms.
   The Edit Related Terms window appears.
3. In the Glossary view, select the business term.
4. Drag the business term into the Edit Related Terms window.
5. Click OK.

Viewing the Impact Summary

When you view the details of a business term, you can view an impact summary. The impact summary displays all objects that impact and are impacted by objects related to the business term.

For example, you create a relationship from a business term to an Oracle table. The impact summary for the business term displays the objects that impact and are impacted by the related Oracle table.

The impact summary for a business term displays the following details:

- Impact Summary Downstream. Lists all business intelligence reports, relational database tables, relational database synonyms, PowerCenter mappings, and additional business terms that are downstream from the object related to the business term. Changes to the related object impact these objects.
Impact Summary Upstream. Lists all business intelligence reports, relational database tables, relational database synonyms, PowerCenter mappings, and additional business terms that are upstream from the object related to the business term. Changes to these objects impact the related object.

You can filter the objects that appear in the impact summary based on the type of resource. Resource type can be Application, Business Glossary, Business Intelligence, Database Management, Data Integration, Data Modeling, or Custom. Enable filters and select one or more resource types from the list. The filter criteria is persisted across objects in the catalog.

Click an impacted object name to view the details of the metadata object or business term in the Browse tab. To refresh the impact summary, click Actions > Refresh. When you export a business term, you can choose to export the impact summary.

Business terms that are related to many other objects may decrease performance when you open the impact summary details. Close the impact summary details when you are not viewing the impact summary.

To view additional details about how a metadata change may affect other metadata objects, run data lineage analysis.

Note: Metadata Manager analyzes and finds impacted objects when you load PowerCenter resources. If a PowerCenter resource load fails, then business terms related to the failed PowerCenter resource may have incorrect information in the impact summary. To view accurate information, ensure that all related PowerCenter resources have successfully loaded.

Differences Between Impact Summary and Data Lineage

When you view the impact summary on a custom object or a packaged metadata object or business term related to a custom object, you may see the following differences from the data lineage diagram:

- A custom object can be related to other objects as both a structure and a field. The impact summary treats such custom objects as a structure or a field, depending on how the custom object is related to the object for which you are viewing the impact summary. Data lineage treats such custom objects as both a structure and a field.

  For example, a custom object is related to a relational database column as a structure and related to a relational database table as a field. The impact summary for the column displays the relationship to the custom object only. The data lineage diagram for the column displays the relationship to the custom object and the custom object's relationship to the upstream relational database table.

- If a custom object is defined as a structure container and is related to another object as a structure, the impact summary for the related object does not display all of the custom object's child elements. Data lineage for the related object does display all of the custom object's child elements.

- If an object is related to a custom object as a structure, the impact summary for a field contained in that structure displays the object related to the custom object. Data lineage displays only the field and does not display the object related to the custom object.

Audit Trails

An audit trail is the history of changes to a business term or category. The audit trail shows the changes that users have made to the properties of a business term or category.

Any change made to a category or business term appears in the audit trail log. Use the audit trail to track the history of changes to a category or to a business term over time.
The audit trail change log for a business term indicates the previous value for the property and the value to which it was changed. The audit trail also includes information on which user made the edit and the date on which the edit was made.

Users can also sort the audit trail information in ascending or descending order.

**Note:** You can also view audit trails for custom glossary objects, properties added to metadata objects, and custom objects. For more information about custom objects, see the *Metadata Manager Custom Metadata Integration Guide*.

### Viewing Audit Trails

You can view audit trails from the following areas on the Browse tab in Metadata Manager:

- Catalog view
- Glossary view
- Search results
- Data lineage analysis

1. Select the business term, category, or custom object for which you want to view the audit trail.
2. In the Details section, click the Audit Trail icon.
3. Click a header to sort the results.
4. To sort audit trails by period, choose a period from the period list and click **Go**.
5. To sort audit trails by a specific property, choose a property from the property list and click **Go**.

### Rules and Guidelines

Use the following rules and guidelines for business term audit trails:

- If you use the Custom Metadata Configurator to load a business glossary, you cannot view the audit trail.
- Metadata Manager includes the audit trail information when you export a business glossary to XML, but not to Excel.

### Searching the Business Glossary

You can perform a basic or advanced search on a business glossary.

#### Performing a Basic Search on a Business Glossary

Perform a basic search on a business glossary to find particular glossary terms.

To perform a basic search on a business glossary:

1. In the Search All field, select **Glossary**.
2. Enter your search criteria.
3. Click **Go**.
   - The Search Results view shows all matching glossary terms and lists them based on the search result configuration. The **Go** button changes to the **Clear** button.
4. Click **Clear** to remove the search criteria.
Performing an Advanced Search on a Business Glossary

Perform an advanced search on a business glossary to find particular glossary terms based on detailed criteria.

To perform an advanced search on a business glossary:

1. In the Search All field, select Advanced Search.
   
The Advanced Search view appears.

2. Enter the following advanced search criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Select <strong>Glossary</strong> and then select the type of glossary term on which you want to search.</td>
</tr>
<tr>
<td>Include Audit Trail</td>
<td>Select to search historical values of business term attributes.</td>
</tr>
<tr>
<td>That Were</td>
<td>Select <strong>Created</strong> or <strong>Last Modified</strong> to specify when the object was created or last modified. If you select one of these options, you must also specify the time frame.</td>
</tr>
<tr>
<td>And</td>
<td>Optionally, select another business term attribute and specify a criteria for the attribute.</td>
</tr>
</tbody>
</table>

3. Click **And** or **Or** to create additional search criteria.

4. Click **Go**.
   
The Search Results view shows all matching glossary terms and lists them based on the search result configuration. If you enabled the **Include Audit Trail** option and Metadata Manager finds a result based on a previous version of a glossary term, Metadata Manager appends "audit trail" to the end of the returned result.

5. Click **Clear** to remove all search criteria.

6. Click the **Save** icon to save the search criteria.
CHAPTER 4

Managing the Business Glossary

This chapter includes the following topics:
- Creating a Business Glossary in Microsoft Excel, 26
- Migrating a Business Glossary, 29
- Modifying the Business Glossary Model, 34
- Using the URL API, 35

Creating a Business Glossary in Microsoft Excel

You can create a business glossary in Microsoft Excel instead of creating it in Metadata Manager. After you create the business glossary in Excel, you can import it into Metadata Manager.

To create the business glossary, you create worksheets named Category and BusinessTerm in a Microsoft Excel file. You then add the values for each category and business term property and add related metadata objects, related business terms, and reference tables for business terms.

To create a business glossary in Microsoft Excel, complete the following steps:

1. Create a Microsoft Excel file with worksheets named Category and BusinessTerm.
2. On the Category worksheet, create a header row with the following columns:
   - Parent Glossary
   - Parent Locations
   - Name
   - Description
   - Usage Context
   - Data Steward
   - Owner
3. On the BusinessTerm worksheet, create a header row with the following columns:
   - Parent Glossary
   - Parent Locations
   - Name
   - Description
   - Usage Context
4. To add custom properties for categories or business terms, add the property names in the header row.
5. Add the category properties that you want to import into the business glossary. Add a row for each category.
6. Add the business term properties you want to import into the business glossary. Add a row for each business term.
7. If you add custom properties for categories and business terms, extend the business glossary model and add the properties.
8. Save the Excel file.

**RELATED TOPICS:**
- “Extending the Model” on page 34

**Category Properties**

The following table describes the properties you configure on the Category worksheet:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Glossary</td>
<td>Required. Name of the business glossary in which the category was created. The parent glossary is the name of the glossary that you want to import. Use a different parent glossary name if the category exists in a different business glossary than the one you import.</td>
</tr>
<tr>
<td>Parent Locations</td>
<td>Required. Location of the category in the business glossary. Use the following syntax: MGY/glossary name&gt; Include multiple categories if the location is a sub-category. For example, if category CustomerInfo is a sub-category of Customers in business glossary Sales, use the following syntax: MGY/Sales/CustomerInfo</td>
</tr>
<tr>
<td>Name</td>
<td>Required. Name of the category. Metadata Manager creates a category with this name when you import the business glossary.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the category.</td>
</tr>
<tr>
<td>Usage Context</td>
<td>Business context in which the category is used.</td>
</tr>
<tr>
<td>Data Steward</td>
<td>Data steward for the category. This must be a Metadata Manager business glossary user with write permission on the business glossary.</td>
</tr>
<tr>
<td>Owner</td>
<td>Owner for the category definition. This must be a Metadata Manager business glossary user with read permission on the business glossary.</td>
</tr>
</tbody>
</table>
### Business Term Properties

The following table describes the properties that you configure on the BusinessTerm worksheet:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Glossary</td>
<td>Required. Name of the business glossary in which a business term was created. The parent glossary is the name of the glossary that you want to import. Use a different parent glossary name if the business term exists in a different business glossary than the one you import.</td>
</tr>
<tr>
<td>Parent Locations</td>
<td>Required. Location of the business term in the business glossary. Use the following syntax:</td>
</tr>
<tr>
<td></td>
<td>MM/&lt;glossary name&gt;/&lt;category name&gt;</td>
</tr>
<tr>
<td></td>
<td>Include multiple categories if the location is a sub-category. For example, if the business term is in the category CustomerInfo, and CustomerInfo is a sub-category of Customers in business glossary Sales, use the following syntax:</td>
</tr>
<tr>
<td></td>
<td>MM/Sales/Customer/CustomerInfo</td>
</tr>
<tr>
<td>Name</td>
<td>Required. Name of the business term. Metadata Manager creates a business term with this name.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the business term.</td>
</tr>
<tr>
<td>Usage Context</td>
<td>Business usage context for the business term.</td>
</tr>
<tr>
<td>Phase</td>
<td>The phase of the business term. Valid values are Draft, Under Review, and Published. If you do not assign a phase, Metadata Manager assigns Draft as the phase when it is imported.</td>
</tr>
<tr>
<td>Reference Table</td>
<td>Reference table name.</td>
</tr>
<tr>
<td>Reference Table URL</td>
<td>URL to the reference table.</td>
</tr>
<tr>
<td>Rule</td>
<td>Rule for the business term that defines how the value of the business term is derived.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the business term in the approval process. Enter one of the following values:</td>
</tr>
<tr>
<td></td>
<td>- Proposed</td>
</tr>
<tr>
<td></td>
<td>- Approved</td>
</tr>
<tr>
<td></td>
<td>- Standard</td>
</tr>
<tr>
<td></td>
<td>- Deprecated</td>
</tr>
<tr>
<td></td>
<td>If you do not enter a value for this property, Metadata Manager imports the business term with an empty value for Status. If you do not enter a legal value for this property, Metadata Manager skips the business term during the import and writes an error in the mm.log file.</td>
</tr>
<tr>
<td>Data Steward</td>
<td>Data steward for the business term. This must be a Metadata Manager business glossary user with write permission on the business glossary. Data Steward is a required property if the phase is set to Under Review or Published. If Data Steward is required but not set, Metadata Manager skips the term during the import and writes an error in the mm.log file.</td>
</tr>
<tr>
<td>Owner</td>
<td>Owner for the business term definition. This must be a Metadata Manager business glossary user with read permission on the business glossary.</td>
</tr>
<tr>
<td>Related Terms</td>
<td>Business terms related to the business term. Use the following syntax:</td>
</tr>
<tr>
<td></td>
<td>MM/&lt;glossary name&gt;/&lt;category name&gt;/&lt;business term name&gt;</td>
</tr>
<tr>
<td></td>
<td>For example, to create a relationship to the business term Q3Sales in category SalesData and in the business glossary Sales, use the following value:</td>
</tr>
<tr>
<td></td>
<td>MM/Sales/SalesData/Q3Sales</td>
</tr>
</tbody>
</table>
### Migrating a Business Glossary

To migrate a business glossary between Metadata Manager instances, export a business glossary from one Metadata Manager instance and import it into another instance. Metadata Manager exports the categories and business terms to a Microsoft Excel or XML file that you can import into another Metadata Manager instance.

Export and import a business glossary from XML between Metadata Manager repositories with the same version. You cannot import a business glossary from XML from a different version.

Export a business glossary to XML if you want to export custom objects and custom relationships. Metadata Manager does not export custom objects and custom relationships when you export the business glossary to Microsoft Excel.

To migrate a business glossary, complete the following steps:

1. **Export the business glossary.** Export the business glossary from Metadata Manager.
2. **Optionally, edit the Excel file.** Edit the Excel file if you want to make changes to the business glossary before you import it.
3. **Create the business glossary resource.** Use the Glossary view in Metadata Manager to create the business glossary resource. To import the categories and business terms, a business glossary resource must exist in Metadata Manager.
4. **Import the business glossary.** Import the Microsoft Excel or XML file that contains the categories and business terms that you exported.

**Related Topics:**
- “Creating a Business Glossary Resource” on page 11

### Exporting a Business Glossary

You can export a business glossary to a Microsoft Excel or XML file. When you export a business glossary, Metadata Manager exports all categories, business terms, relationships, comments, links, properties, and the history of changes to each property.
The following table describes the default category and the business term properties that Metadata Manager exports:

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Parent Glossary, Parent Locations, Name, Description, Usage Context, Data Steward, Owner</td>
</tr>
<tr>
<td>BusinessTerm</td>
<td>Parent Glossary, Parent Locations, Name, Description, Usage Context, Reference Table, Rule, Status, Data Steward, Owner, Related Terms, Related Catalog Objects, Impact Summary Downstream, Impact Summary Upstream, Phase</td>
</tr>
</tbody>
</table>

The parent glossary is the business glossary in which a business term is created. The parent location is the name of the business glossary that includes the categories and business terms.

**Rules and Guidelines for Exporting a Business Glossary**

Read the following rules and guidelines before you export a business glossary.

Use the following rules and guidelines when you export a business glossary to a Microsoft Excel or XML file:

<table>
<thead>
<tr>
<th>Applicable File Types</th>
<th>Guideline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Excel</td>
<td>Metadata Manager exports all properties for the categories and business terms. Metadata Manager also exports objects that other business glossaries share and lineage.</td>
</tr>
<tr>
<td>XML</td>
<td>If you export to Microsoft Excel, Metadata Manager exports packaged objects. If you export to XML, Metadata Manager exports packaged and custom objects.</td>
</tr>
<tr>
<td>XML</td>
<td>Metadata Manager does not assign default values to properties that do not contain a value in the business glossary.</td>
</tr>
<tr>
<td>XML</td>
<td>You can import a category or business term under the root directory of a business glossary. You cannot import an existing category under a business term or custom object.</td>
</tr>
<tr>
<td>XML</td>
<td>When you export a business glossary to XML, Metadata Manager includes Audit Trails, custom objects, and custom relationships. Metadata Manager does not export Audit Trails.</td>
</tr>
</tbody>
</table>
Applicable File Types | Guideline
--- | ---
Microsoft Excel | custom objects, and custom relationships when you export a business glossary to Excel.
Microsoft Excel | The first row in each worksheet is a header row that corresponds to the category or business term property name. Metadata Manager creates header columns for custom properties that you added to the category or business term, and to the model.
Microsoft Excel | Metadata Manager exports each category and business term to a separate row in the Microsoft Excel file.
Microsoft Excel | Metadata Manager exports all related terms and related catalog objects for each business term in the same cell. A comma and a line break separate related metadata objects in a cell.
Microsoft Excel | If a category or business term has more than one parent, Metadata Manager exports all parent locations in a single cell. A comma and a line break separate each parent location in a cell.
Microsoft Excel | Metadata Manager creates a header column named Phase in Microsoft Excel to indicate the phase of a business term. Valid values are Draft, Under Review, and Published.
XML | To prevent file corruption, do not modify the exported XML file before you import it.

Exporting a Business Glossary to Microsoft Excel

You can export the business glossary to Microsoft Excel to migrate the business glossary to another Metadata Manager instance or to back up the glossary.

To export a business glossary to Microsoft Excel:
1. From the Show list in the Glossary view, select a business glossary.
2. Click Actions > Export > Glossary to Excel.
   
   Metadata Manager exports the business glossary to a Microsoft Excel file. You can save the Microsoft Excel file.

Exporting a Business Glossary to XML

You can export the business glossary to XML to migrate the business glossary to another Metadata Manager instance or to backup the glossary.

To export a business glossary to XML:
1. From the Show list in the Glossary view, select a business glossary.
2. Click Actions > Export > Glossary to XML.

   Metadata Manager exports the business glossary to an XML file. You can save the XML file.
Importing a Business Glossary

Import a business glossary to create or update business glossary categories and business terms in Metadata Manager. You can import a business glossary that you created or one that you exported from Metadata Manager. You can import a business glossary from a Microsoft Excel or XML file.

When you import a business glossary, Metadata Manager validates the contents and structure of the Microsoft Excel or XML file. Metadata Manager imports each row in a Microsoft Excel file as a separate category or business term.

When importing a business glossary, Metadata Manager inserts new terms and categories, and updates existing terms and categories. Metadata Manager uses the relative location and the object name to decide if an object exists in the business glossary.

Rules and Guidelines for Importing a Business Glossary

Read the following rules and guidelines before you import a business glossary.

Use the following rules and guidelines when you import a business glossary from a Microsoft Excel or XML file:

<table>
<thead>
<tr>
<th>Applicable File Types</th>
<th>Guideline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Excel</td>
<td>If the import process fails, Metadata Manager does not import any categories or business terms into the business glossary.</td>
</tr>
<tr>
<td>XML</td>
<td>Metadata Manager imports a business term that has an empty status or one of the following valid statuses: Proposed, Approved, Standard, or Deprecated. If the business term has a status value that is not valid, Metadata Manager does not import the business term and an error appears in the mm.log file.</td>
</tr>
<tr>
<td>Microsoft Excel</td>
<td>Metadata Manager imports a business term that has any status value. Metadata Manager does not validate the status value of a business term.</td>
</tr>
<tr>
<td>XML</td>
<td>If a business term has multiple relationships with different categories in the file, Metadata Manager maintains all the relationships.</td>
</tr>
<tr>
<td>Microsoft Excel</td>
<td>If a category or business term exists, Metadata Manager updates it with the property values in the file. Metadata Manager uses the value of the Parent Location and Name properties to determine if the category or business term exists.</td>
</tr>
<tr>
<td>XML</td>
<td>If the file does not provide values for all required fields for a category or business term, Metadata Manager does not import the category or business term. You can view the errors and values that are not valid in the mm.log file.</td>
</tr>
<tr>
<td>Microsoft Excel</td>
<td>If an object does not have a related business term or related catalog object, Metadata Manager imports the object. Metadata Manager displays a message in the mm.log that no related business terms or related catalog objects exist.</td>
</tr>
<tr>
<td>XML</td>
<td>Metadata Manager does not import the comment or link when the user who created the object does not exist in the business glossary. Metadata Manager displays the error in the mm.log file.</td>
</tr>
</tbody>
</table>
Applicable File Types | Guideline
---------------------|----------------------------------------------------------
Microsoft Excel      | The import process does not validate the reference table name or reference table URL. |
XML                  | Metadata Manager does not import attribute change history. |
Microsoft Excel      | If a value for a property exceeds 4000 characters, Metadata Manager truncates the value of the property to 4000 characters. Metadata Manager adds the category or business term name with the truncated property value to the mm.log file. |
XML                  | If the import file contains duplicate entries for a category or business term, Metadata Manager imports the first instance and adds the ignored values in the mm.log file. |
Microsoft Excel      | Metadata Manager ignores business terms with values other than Draft, Under Review, and Published in the Phase column. Metadata Manager adds the ignored business terms in the mm.log file. |

Importing a Business Glossary from Microsoft Excel

You might import a business glossary from Microsoft Excel if you migrate a business glossary to another Metadata Manager instance or create the business glossary in Microsoft Excel.

To import a business glossary from Microsoft Excel:

1. From the Show list in the Glossary view, select a business glossary.
2. Click Actions > Import > Glossary from Excel.
   The Import Glossary Metadata dialog box appears.
3. Enter the name and path of the Microsoft Excel file that contains the business glossary, or click Browse to select the file.
4. Click Import.
   Metadata Manager validates the contents of the Microsoft Excel file and imports the business glossary. It also displays the number of objects that were created, updated, and not valid.

Importing a Business Glossary from XML

You might import a business glossary from XML if you migrate a business glossary to another Metadata Manager instance.

To import a business glossary from XML:

1. From the Show list in the Glossary view, select a business glossary.
2. Select a term in the business glossary.
3. Click Actions > Import > Glossary from XML.
   The Import Glossary Metadata dialog box appears.
4. Enter the name and path of the XML file that contains the business glossary, or click Browse to select the file.
5. Click Import.
   Metadata Manager validates the contents of the XML file, imports the business glossary, and displays the number of objects that were created, updated, and not valid.
Modifying the Business Glossary Model

The business glossary model is a group of classes, properties, and relationships that define a business glossary. Metadata Manager uses the model to define the types of metadata objects, properties, and relationships you can include in a business glossary. Each class in the model defines a type of metadata object that the business glossary may contain.

You can modify the business glossary model packaged with Metadata Manager to add properties for categories and business terms or add metadata object types. You can also extend the business glossary model packaged with Metadata Manager.

If you want all business glossaries created in Metadata Manager to contain the properties and metadata object types that you add, extend the business glossary model. For example, you want to add a property named Technical Name that contains the metadata object name that a business term represents. You want all business glossaries to contain this object type.

Note: You cannot remove the category and business term classes, properties, or relationships from the business glossary model.

Extending the Model

If you want to add custom properties or metadata objects to a business glossary, extend the model. Modify the model and add properties and metadata object types. All business glossaries based on that model will contain the changes you make. You can then modify business glossaries and specify values for the properties or create the metadata object types.

To extend the business glossary model, complete the following steps on the Model page in Metadata Manager:

1. Select the business glossary model. Select the BusinessGlossary model to view the Category and BusinessTerm classes.
2. Add properties to the Category class. Open the Category class, select the Attributes view, and configure name, description, and type for the properties. Save the changes.
3. Add properties to the BusinessTerm class. Open the BusinessTerm class, select the Attributes view, and configure name, description, and type for the properties. Save the changes.
4. Add classes. Select the level of the BusinessGlossary model hierarchy to which you want to add classes. Add the classes and configure the properties and relationships. Save the changes.

After you extend the model, complete one of the following tasks on the Browse page:

- Configure the categories, business terms, and metadata objects. In the Glossary view on the Browse page, select the categories and business terms and configure the properties. If you added classes to the business glossary, create the metadata objects for the classes in the business glossary. Configure the metadata object properties and related catalog objects.
- Create a business glossary. Create a business glossary resource and configure the categories, business terms, and metadata objects.

Modifying a Model

To modify a model, add properties to the existing classes or create classes and properties. You can then create a business glossary that contains the properties and metadata object types.

To modify a business glossary model, complete the following steps on the Model page in Metadata Manager:

1. Add properties to the Category class. Open the Category class, select the Attributes view, and configure name, description, and type for the properties. Save your changes.
2. **Add properties to the BusinessTerm class.** Open the BusinessTerm class, select the Attributes view, and configure name, description, and type for the properties. Save your changes.

3. **Add classes.** Select the level of the BusinessGlossary model hierarchy to which you want to add the class. Add the class and configure the properties and relationships. The classes you create correspond to the metadata objects that you want to create in the business glossary. Save your changes.

To create the business glossary and add metadata objects, complete the following steps on the Browse page:

1. **Create the business glossary resource.** In the Glossary view, create a business glossary resource and select the model that you created.

2. **Add the metadata objects.** Add the custom metadata objects for which you created classes in the model. You can also add categories and business terms.

3. **Configure relationships.** Configure the related catalog objects for the metadata object types that you added to the business glossary.

---

### Using the URL API

Metadata Manager includes a URL API that you can use to access details for business glossary categories and business terms from third-party applications.

To use the URL API, create a link to the category or business term that you want to view from the third-party application. When you click the link, Metadata Manager displays the Details section for the category or business term in a browser window.

**Note:** You can also use the URL API to view data lineage for the category or business term.

The URL API uses the following syntax:

```
http[s]://<host name>[:<port>]/mm/lineage?objectPath=MM/<resource name>/
<metadata object path>/<metadata object name>&mode=<mode>
```

For example, to view the Address business term in the Customers category of the Sales business glossary, use the following URL:

```
http://MMHost:10250/mm/lineage?objectPath=MM/Sales/Customers/Address&mode=detail
```

The following table describes the lineage URL API arguments:

<table>
<thead>
<tr>
<th>Argument</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>host name</td>
<td>Required. Host name of the machine running the Metadata Manager application.</td>
</tr>
<tr>
<td>port</td>
<td>Required. Port number of the Metadata Manager application.</td>
</tr>
<tr>
<td>resource name</td>
<td>Required. Name of the resource in the metadata catalog or name of the business glossary.</td>
</tr>
</tbody>
</table>
| metadata object path| Required. Path to the metadata object in the metadata catalog. The value of this argument must meet the following requirements:  
- Start with the top-level resource name, such as PowerCenter or Oracle_DB.  
- End with the name of the object that you want to use.  
- Use the same delimiter for the entire path. Use slash (/). |
<table>
<thead>
<tr>
<th>Argument</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>metadata object name</td>
<td>Required. Name of the metadata object in the metadata catalog or the category or business term name in a business glossary.</td>
</tr>
<tr>
<td>mode</td>
<td>Mode you want to use to access the metadata object:</td>
</tr>
<tr>
<td></td>
<td>- Lineage. Displays results as a data lineage diagram with the Details section.</td>
</tr>
<tr>
<td></td>
<td>- Details. Displays the Details section only.</td>
</tr>
<tr>
<td></td>
<td>If you do not enter a mode, the URL API displays results as a data lineage diagram.</td>
</tr>
</tbody>
</table>
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  creating categories 12
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  changing a password 6
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  propose
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  publish
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  linking 14
  linking to business term 14
  URL 14
  variables in URL 14
  viewing 21

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  creating 16
  viewing 21

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  creating 22
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  viewing object details 35
  usage context
    business terms 12
    categories 12
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