

IBM InfoSphere Business Glossary
Version 8 Release 7

Administrator's and Author's Guide



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Note

Before using this information and the product that it supports, read the information in “Notices and trademarks” on page 93.

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Chapter 1. Overview

IBM® InfoSphere® Business Glossary provides users with a Web-based tool for creating and managing standard definitions of business and organization concepts by using a controlled vocabulary. The tool divides metadata into categories, each of which contains terms. You can use terms to classify other objects in the metadata repository based on the needs of your organization. You can also designate users or groups as stewards for metadata objects.

Accessing business glossary content

You can access the data assets that are stored in the metadata repository with several different business glossary interfaces.

You can access glossary content by using the following interfaces:

InfoSphere Business Glossary browser

You can access InfoSphere Business Glossary from any web browser with the InfoSphere Business Glossary browser. From this interface, you can perform all glossary-related tasks. Designated users can administer the glossary and author glossary content, and all InfoSphere Business Glossary users can browse and search the glossary.

IBM InfoSphere Business Glossary Anywhere

This search tool, accessible from your Microsoft Windows desktop, provides access to glossary content from within other text applications without the need to open a separate web browser window.

InfoSphere Business Glossary REST API

A REST (Representational State Transfer) API (Application Programming Interface) is provided with InfoSphere Business Glossary Anywhere. This API enables client applications to access and author business glossary content.

InfoSphere Business Glossary Client for Eclipse

An Eclipse plug-in component enables users of other Eclipse-based applications to browse glossary content directly within the Eclipse application. For example, users of products in the IBM Rational® Software Architect family and users of IBM InfoSphere Data Architect can view and search for terms, categories, and their properties. You can assign terms to elements of physical data models and logical data models. You can also extend other Eclipse-based applications to incorporate similar glossary access.

The following table compares the access methods for the glossary:

Table 1. Comparison of business glossary access methods

	InfoSphere Business Glossary browser	InfoSphere Business Glossary Anywhere	InfoSphere Business Glossary REST API	InfoSphere Business Glossary Client for Eclipse
How do users access the interface?	In a web browser	On your computer in the system tray	Programmatic interface (any programming language)	From other Eclipse-based applications

Table 1. Comparison of business glossary access methods (continued)

	InfoSphere Business Glossary browser	InfoSphere Business Glossary Anywhere	InfoSphere Business Glossary REST API	InfoSphere Business Glossary Client for Eclipse
Who uses this interface?	Any Information Server user with the Business Glossary Basic User role or higher	Any Information Server user with the Business Glossary User role or higher	Application developers	<ul style="list-style-type: none"> Users of other Eclipse-based applications that work with physical data models, logical data models, or Unified Modeling Language (UML) models Eclipse developers
What can users do?	<ul style="list-style-type: none"> Administer the business glossary, including creation of custom attributes, properties, and filters Add, delete, edit, search, and view terms, categories, and custom attributes View terms, categories, stewards, and custom attributes Export and import terms and categories by using an XML, XMI, or CSV file Send feedback about the asset to its steward, if one is assigned 	<ul style="list-style-type: none"> Search the glossary for terms that are captured from any text-based document or Web page on your desktop Open the glossary browser to view details of a term 	Developers can develop client applications that enable users to perform some or all of the functions that are available from the administrative or browser interfaces of InfoSphere Business Glossary, but from within a custom client.	<ul style="list-style-type: none"> View and search for glossary terms and categories View properties of glossary terms and categories Assign terms to data model elements, or get autocomplete suggestions from the glossary when you edit a data model element name
What kind of searches can users do in the glossary?	<ul style="list-style-type: none"> All contents of the glossary Search results can be filtered 	<ul style="list-style-type: none"> Names and short descriptions of terms and categories Search results can be filtered 	Any of the searches that are available from the administrative or browser interfaces of InfoSphere Business Glossary, but from within a custom client.	<ul style="list-style-type: none"> All terms, categories, and their descriptions Search results can be filtered
Can users export the search results?	Yes. The export is in CSV format.	No	Depends on functionality of the custom client.	No
Can users export parts of the glossary?	Yes. The export formats are: <ul style="list-style-type: none"> comma-separated value (CSV) Extended Markup Language (XML) XML Metadata Interchange (XMI) 	No	Depends on the functionality of the custom client.	No

Table 1. Comparison of business glossary access methods (continued)

	InfoSphere Business Glossary browser	InfoSphere Business Glossary Anywhere	InfoSphere Business Glossary REST API	InfoSphere Business Glossary Client for Eclipse
Where can users learn more?	See "Logging in to IBM InfoSphere Business Glossary," "Administering the glossary," "Authoring glossary content," and "Viewing glossary content."	See "Looking up terms in business documents."	See the "Developing with the IBM InfoSphere Business Glossary REST API" section of the installed information center.	See "IBM InfoSphere Business Glossary Client for Eclipse".

Related information

 [Browsing glossary content](#)

 [Looking up terms in business documents](#)

Accessing business glossary content from Eclipse applications

IBM InfoSphere Business Glossary includes an Eclipse plug-in component to access glossary content from within any Eclipse-based application.

Business scenarios

You can easily organize and access business-relevant metadata to help make business decisions.

IBM InfoSphere Business Glossary and IBM InfoSphere Business Glossary

Anywhere provide a business context for managing and viewing metadata. The following scenarios show how two different business environments organized their metadata to solve business problems.

Insurance: Risk information

Problem: Insurance companies define levels of risk by using various parameters such as age, prior accident claims, credit rating, and so on. Agents need to know how their particular company defines levels of risk to process claims correctly.

Solution: By using InfoSphere Business Glossary, the glossary administrator and business analyst in an insurance company work together to design the glossary structure. The glossary is organized into categories, each of which contains terms used in business correspondence and financial reports. For example, terms such as *risk*, *coverage*, and *prior claims* are given definitions specific to the company. Along with a definition of each term, the business analyst associates each term with an asset such as a specific table or column in the company's database. Stewards are assigned to various terms to maintain the term definitions according to the needs of the company.

A new claims agent in the company is learning what to do in the case of a "Claim for an Assigned Risk 3 after Deductible". Because he does not know what "Assigned Risk 3" is in his company's policy plans, he uses InfoSphere Business Glossary browser to look up the definition. In addition, the claims agent finds other business terms that are related, instructions on how to handle these claims, and the location in the database where "Assigned Risk 3 Premium and Deductible" data is stored.

Manufacturing: Production information

Problem: A Chief Financial Officer needs to determine the profitability of a production line by using specific financial parameters. He wants to analyze each stage of production.

Solution: The glossary administrator and business analyst design the glossary structure by using InfoSphere Business Glossary. Separate categories are defined for each stage of production. Members of the finance team assign terms within each category to specific database tables and columns.

Another business analyst receives a request to present a business intelligence report on revenues and operating expenses at each stage of production. The analyst uses the InfoSphere Business Glossary browser to view each category, check the meaning of its terms, and select which terms are needed for his report. The analyst sends a request to the database team to build a report based on the selected terms. The database team builds the report by using the glossary browser to find which database columns are associated with those terms.

In addition to understanding the semantic meaning of these terms, the analyst invokes business lineage to view the data sources that populate the business intelligence report. The chief financial officer, while viewing the report, can use InfoSphere Business Glossary Anywhere to understand the definitions of the fields used in it.

Related information

Planning, designing, and publishing a glossary

A business glossary is an authoritative dictionary of the terms and relationships that are used throughout the enterprise. One of the main benefits of a well-designed business glossary is increased trust and confidence in enterprise information.

Chapter 2. Integrating with other software

You can integrate IBM InfoSphere Business Glossary with other software products as well as custom applications.

InfoSphere Business Glossary is designed to work with other software products, both within the IBM InfoSphere Information Server suite and outside of the suite. In addition, you can develop custom applications or extend existing applications to incorporate InfoSphere Business Glossary features and functions.

For example, you can interact with glossary content with the following InfoSphere Information Server components in addition to InfoSphere Business Glossary and IBM InfoSphere Business Glossary Anywhere:

- IBM InfoSphere Information Analyzer
- IBM InfoSphere Metadata Workbench
- IBM InfoSphere FastTrack

In addition, InfoSphere Business Glossary works together with IBM Industry Models, IBM Cognos® products, and, with the InfoSphere Business Glossary Client for Eclipse, with Eclipse-based IBM products such as Rational Software Architect and InfoSphere Data Architect.

You can use the InfoSphere Business Glossary Client for Eclipse Java API to extend other Eclipse-based applications. And, you can create custom applications or extend existing applications, with the InfoSphere Business Glossary REST API.

Integration with IBM Cognos products

IBM InfoSphere Business Glossary can work with IBM Cognos Business Intelligence products.

IBM Cognos Business Intelligence provides capabilities and information that businesses need to manage their performance. If you have IBM Cognos Business Intelligence 8 or IBM Cognos Business Intelligence 10 and InfoSphere Business Glossary or InfoSphere Business Glossary for Cognos installed, you can view glossary content from directly within the IBM Cognos Business Intelligence interface.

In addition, you can configure InfoSphere Business Glossary to directly search for references to terms within reports in IBM Cognos Business Intelligence. From within the InfoSphere Business Glossary display of term or category properties, users can click a link to display the results of searches by IBM Cognos 8 Go!, which searches the set of reports in IBM Cognos Business Intelligence. Network access must be available between IBM Cognos 8 Go! and InfoSphere Business Glossary.

You can also convert information in business intelligence (BI) reports from IBM Cognos products or other business intelligence tools into terms and categories by using the **bi2bg** command.

Related information

 [Generating glossary content from business intelligence models](#)

Integration with IBM Industry Models

The IBM InfoSphere Business Glossary Packs for IBM Industry Models provide industry-specific sets of terms that you can use to quickly populate a business glossary.

IBM InfoSphere Business Glossary Packs for industries such as telecommunications, financial services, retail, insurance, and health plan provide glossary archive (XMI) files of business terms specific to those business areas. You can import the file into InfoSphere Business Glossary to create a "starter" glossary that contains terms that apply to your business. You can then customize the glossary to meet the particular needs of your organization by using the glossary management functions available with InfoSphere Business Glossary.

If you have an IBM Industry Models Data Pack, you can also import assigned relationships between business terms and the data model elements.

Related information

 [IBM Industry Models](#)

Gather sources for categories and terms

You can populate your glossary with categories and terms that already exist in your enterprise or that come from external sources.

Integration with other IBM InfoSphere Information Server products

You can interact with glossary content by using several different products in the IBM InfoSphere Information Server suite.

You can interact with glossary content with the following components of the InfoSphere Information Server suite:

- IBM InfoSphere Information Analyzer
- IBM InfoSphere Metadata Workbench
- IBM InfoSphere FastTrack
- IBM InfoSphere Blueprint Director

You can also interact with glossary content with IBM InfoSphere Discovery.

You can import and export glossary content with these other components of InfoSphere Information Server:

- IBM InfoSphere Metadata Asset Manager
- IBM InfoSphere Data Architect MetaBroker®
- IBM Rational Data Architect MetaBroker
- IBM Rational Data Architect MetaBroker

Related information

Gather sources for categories and terms

You can populate your glossary with categories and terms that already exist in your enterprise or that come from external sources.

[IBM InfoSphere Information Analyzer](#)

[IBM InfoSphere Metadata Workbench](#)

[IBM InfoSphere FastTrack](#)

[IBM Categories and Terms MetaBroker](#)

Integration with Eclipse-based applications

IBM InfoSphere Business Glossary includes an Eclipse plug-in component to access glossary content from within any Eclipse-based application.

You can use the InfoSphere Business Glossary Core feature with any Eclipse-based application. This feature enables you to view the metadata repository glossary content in your local environment. You can also browse the glossary, search its content, and view the properties of terms and categories.

By using IBM InfoSphere Business Glossary UML Integration and the IBM InfoSphere Business Glossary UML Profile features, you can integrate glossary terms into UML model elements. InfoSphere Business Glossary UML Profile feature alone gives you the ability to see what terms have been assigned to existing model elements, but without editing capability.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Data Architect, you can assign terms to physical data model elements and logical data model elements. These assignments can be exported into the metadata repository for use by other products in the InfoSphere Information Server suite.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Warehouse, you can assign terms to data flow elements in the SQL Warehousing (SQW) Tool. These assignments can be exported to the metadata repository for use by other products in the InfoSphere Information Server suite.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Blueprint Director, you can assign terms to elements in blueprints.

You can extend other Eclipse-based applications to make use of the same features by using the InfoSphere Business Glossary Client for Eclipse Java API.

Related concepts

Chapter 9, “Accessing business glossary content from Eclipse applications,” on page 83

IBM InfoSphere Business Glossary includes an Eclipse plug-in component to access glossary content from within any Eclipse-based application.

Custom applications

You can create custom applications or extend existing applications to take advantage of IBM InfoSphere Business Glossary.

You can create custom software applications that use the features of InfoSphere Business Glossary with the InfoSphere Business Glossary REST (Representational

State Transfer) API (Application Programming Interface). You can also use the REST API to extend the functionality of existing applications.

You can extend Eclipse-based applications to integrate with InfoSphere Business Glossary by using the InfoSphere Business Glossary Java API.

Related concepts

Chapter 10, “Developing and extending applications,” on page 85

You can create custom applications or extend existing applications to take advantage of IBM InfoSphere Business Glossary.

Chapter 3. Glossary concepts

You should be familiar with certain concepts before you start using IBM InfoSphere Business Glossary.

Terms

A term is a word or phrase that describes a characteristic of the enterprise. Terms are the fundamental building block of the business glossary.

When you create a term in the glossary, you define it by specifying its properties. The properties of a term give it meaning and differentiate it from other terms.

The following term properties are required:

- A unique name
- A parent category that specifies its location in the glossary hierarchy
- Status in the lifecycle such as accepted or deprecated

Other, optional properties of a term further explain it and differentiate it from other terms. For example, you can enter a description (a long version and a short version), example of usage, a list of synonyms and a single preferred synonym, and relationships to other terms, categories, and other assets in the metadata repository. You can also define two kinds of custom properties: custom attributes and labels. After a custom attribute or a label is defined for the glossary as a whole, it can be applied to individual terms.

An important aspect of the business glossary is that information technology assets can be assigned to terms. By assigning an asset to a term you can provide business context to that asset. Assets that are assigned to terms can be of two types: assets that are represented in the IBM InfoSphere Information Server metadata repository, called assets, or assets that do not reside in the metadata repository, called external assets.

You can also define other kinds of term relationships. For example, a term can be related to another term, referenced by one or more categories other than its parent category, and can be replaced by another term.

Examples

The following examples illustrate some of the term properties that you can specify:

assigned asset

A BI report has a section called Account IDs. You assign the BI report, which is an asset, to the term Account ID, because the full definition of the term in the glossary explains the meaning of "Account ID" to the organization. The full definition of Account ID in the business glossary consists of the term, its properties, and any other information associated with the Account ID term. This information helps people who read the report understand what is being referred to in the "Account IDs" section. In this case you would set IsModifier to Yes.

synonym terms

The term Billing Information has the synonyms Billing Address and Bill To.

If you get a report on Billing Address but you use the term Billing Information, the synonym attribute confirms that these two terms are synonyms.

related terms

Billing Information has the related terms Address Details and Shipping Information. These related terms indicate that Billing Information is related to addresses. In contrast, if Billing Information had the related terms Invoice and Receipt, then the concept of Billing Information is related to financial charges.

referenced terms

The term Billing Information is contained by the category Payment Details. When you view the category Contact Details, you see Billing Information as a referenced term.

Related concepts

Chapter 7, "Authoring glossary content," on page 73

Users with the appropriate security roles can create and modify glossary terms and categories.

"Relationships" on page 15

Some term and category properties define relationships among terms, categories, and other assets in the metadata repository.

Related tasks

"Creating new terms" on page 73

Authorized users can create new terms.

"Editing terms and categories" on page 75

Authorized users can edit existing terms and categories.

Term status

The Business Glossary Administrator can specify a subset of terms to display in the glossary based on their maturity level.

When you define a term, you must designate one of the following status levels for the term: Standard, Accepted, Candidate, and Deprecated. The Business Glossary Administrator can specify which of these sets of terms to display in the glossary. By default, all status types are selected so that the glossary displays all terms, with any status.

For example, you might decide that you do not want to show terms that have been replaced by another term. You can specify that Deprecated terms should not be displayed. When a term is replaced by another term, the term author could edit the term that is being replaced and specify that it has Deprecated status. After this change, the term will not appear in the glossary.

To specify the status of terms to display, click the **Administration** tab, then under Options, select **Term and Property Display**.

Related concepts

"Deploying glossary content when workflow is disabled" on page 51

When the workflow feature is disabled, changes to glossary content are made immediately.

Categories

A category is like a folder or directory that organizes your glossary content.

Categories provide the logical structure for the glossary so that you can browse and understand the relationships among terms and categories in the glossary.

A category can contain other categories and terms. In addition, a category can reference terms that it does not contain. For example, the category named Customer Summary has a subcategory named Customer Expense Summary. The category has a term named Credit Card Risk Score and references the term Credit Card Risk.

Access to glossary content is provided by permissions that are based on categories. The Business Glossary Administrator can specify which categories can be accessed by specific users. By default, all users can access all categories.

Related concepts

Chapter 7, “Authoring glossary content,” on page 73

Users with the appropriate security roles can create and modify glossary terms and categories.

Related tasks

“Creating new categories” on page 74

Authorized users can create new categories.

“Editing terms and categories” on page 75

Authorized users can edit existing terms and categories.

Term and category properties

You specify properties for each term and category in the business glossary to provide glossary terms with meaning and context.

Terms are characterized in the glossary by the values of their properties. Properties can be standard properties, which are ready for use by authors of terms or categories, or they can be custom properties, which must first be configured for your particular glossary.

Related tasks

“Editing terms and categories” on page 75

Authorized users can edit existing terms and categories.

Standard properties

You provide meaning to terms by specifying their properties. IBM InfoSphere Business Glossary provides a set of standard properties.

Terms are characterized in the glossary by the values of their properties. Properties can be standard properties, which are ready for use by authors of terms or categories, or they can be custom properties, which must first be configured for your particular glossary.

Standard properties are those that are ready for immediate use by term authors and do not require any additional configuration to InfoSphere Business Glossary.

Business Glossary Administrators can also define nonstandard properties, called custom properties.

Terms and categories can have the following standard properties, listed here in alphabetical order.

Abbreviations

Abbreviations of the term.

Assigned Assets

Assets such as jobs, reports, and database tables that are assigned to a term. Multiple assets can be assigned to a single term. An asset can be assigned to multiple terms.

Assigned External Assets

Assets that are outside of the InfoSphere Information Server metadata repository, such as business process models or web services, that are assigned to a term.

Contained term

A term must be contained by a category. The term must be contained by only one category.

Example

An example of how the term is used, or a typical sample value.

Is Modifier

Describes whether the primary purpose of the term is to provide descriptive information about an asset.

No The primary purpose of the term is to identify distinguishing characteristics of an asset. No is the default value.

Yes The primary purpose of the term is to provide descriptive information about an asset.

Label A simple, short descriptor that can be used as another way to group assets.

Long Description

A long description of the term (up to 8000 characters).

Name The name can contain any character, and can be several words separated by spaces. Names can be up to 255 characters.

Parent Category

The category that contains the term.

Preferred Synonym

The term that is the preferred term in a group of synonym terms. Terms with the Deprecated status cannot be preferred terms.

Referenced term

A category can reference a term. A term can be referenced by multiple categories.

Related Terms

Terms that are related in some way to the term in question. This relationship can be used for *see also* relationships to terms that are similar but not identical. The relationship is symmetrical. If you specify that term A has term B as a related term, then term B has term A as a related term. A term can have multiple related terms.

Replaced by term

The term that replaces this term.

Replaces

The term that is replaced by this term.

Short Description

A brief description of the term (up to 255 characters). Short descriptions are used in searches.

Status The approval status of the term within the organization:

Candidate

The default value for new terms.

Accepted

This term has been accepted by an administrator for general use.

Standard

Considered the standard for definitions of its type.

Deprecated

The term must no longer be used.

Steward

The user or user group that is the steward for the term.

Synonyms

Terms that have the same meaning. A term can have multiple synonym terms. The relationship is symmetrical and transitive. If term A is a synonym of term B, and term B is a synonym of term C, each term is a synonym of the others.

Type The classification of a term based on its use in your organization.

None The type has not been declared. None is the default value.

Primary

The term describes a major enterprise concept such as a client or an employee.

Secondary

The term identifies a secondary distinguishing characteristic of a business concept, such as an identification number.

Usage Information about how to use the term, and any business rules that govern its use.

Related concepts

“Custom properties”

Custom properties are properties that must be configured before they are available for use by term and category authors.

Custom properties

Custom properties are properties that must be configured before they are available for use by term and category authors.

You can define the following types of custom properties:

- Custom attributes
- Labels

These custom properties are defined for the glossary as a whole. They must be configured by a Business Glossary Administrator. After a custom property is configured for the glossary, it becomes available to authors for assignment to any term or category.

Related concepts

“Standard properties” on page 11

You provide meaning to terms by specifying their properties. IBM InfoSphere Business Glossary provides a set of standard properties.

Custom attributes

Custom attributes are properties of categories and terms that you can create if the standard properties do not meet your needs.

You must be a Business Glossary Administrator to create, modify, or delete a custom attribute.

Custom attributes apply to terms, categories, or to both terms and categories. If you apply the custom attribute to both terms and categories, two separate custom attributes are created with the same name: one that applies to terms and one that applies to categories.

Each custom attribute has a name, a description, and an attribute type. The type can be a string or an enumerated list of strings. You can edit the custom attribute and change its type at any time:

- From the Enumerated to the String type, the value is saved as type String.
- From the String to the Enumerated type, you lose the value of the string unless you include that exact string in the enumerated list of strings.

The initial value of each custom attribute for a term or a category is NULL. You can edit the term or category and assign a value for its custom attributes.

Example

You create a custom attribute that is named Data Sensitivity with this short description:

A number from 1 to 5 that indicates the sensitivity of the data. Sensitivity is a subjective measure of the impact of the term being released to unauthorized consumers.

You can specify that the Data Sensitivity attribute applies only to terms. You choose the enumerated type and enter the numbers 1 through 5 as values. After you create the custom attribute, you assign one of these values to each term that you release to consumers.

Related concepts

“Labels”

Labels are simple, short descriptors for assets that have something in common that is meaningful to your enterprise. Labels can be used in search and filtering.

Labels

Labels are simple, short descriptors for assets that have something in common that is meaningful to your enterprise. Labels can be used in search and filtering.

You can apply a label to any type of asset in the metadata repository. You can think of labels as keywords or tags that you apply to assets. You might want to label assets of a variety of types with the same label.

For example, if broad geographic region is of concern to your enterprise, you might have defined the labels Asia, America, and Europe. All assets related to Asia

can be labeled with the "Asia" label. All assets related to Europe can be labeled with the "Europe" label, and so on. In each case, the assets can be of a multiple types. For example, the label "Asia" might be applied to terms, categories, BI reports, jobs, and databases.

Business Glossary Administrators define labels from within IBM InfoSphere Business Glossary. Once a label is defined for the glossary, any InfoSphere Business Glossary, user who can author or edit terms can assign the label to metadata repository assets. In addition, Business Glossary Asset Assigners can assign labels from within other tools in the IBM InfoSphere Information Server suite that support the Business Glossary Asset Assigner role.

Even though a label has been defined for the glossary, it is optional to apply it to any given asset.

Labels cannot be applied to external assets.

Related concepts

"Custom attributes" on page 14

Custom attributes are properties of categories and terms that you can create if the standard properties do not meet your needs.

Relationships

Some term and category properties define relationships among terms, categories, and other assets in the metadata repository.

Properties can define the following kinds of relationships among assets:

- Between terms
- Between categories and terms
- Between terms and assets

Properties that define relationships

You can specify that terms have the following types of relationships, listed here in alphabetical order. These are a subset of all possible properties.

Assigned Assets

Assets such as jobs, reports, and database tables that are assigned to a term. Multiple assets can be assigned to a single term. An asset can be assigned to multiple terms.

Assigned External Assets

Assets that are outside of the InfoSphere Information Server metadata repository, such as business process models or web services, that are assigned to a term.

Contained term

A term must be contained by a category. The term must be contained by only one category.

Preferred Synonym

The term that is the preferred term in a group of synonym terms. Terms with the Deprecated status cannot be preferred terms.

Referenced term

A category can reference a term. A term can be referenced by multiple categories.

Replaced by term

The term that replaces this term.

Replaces

The term that is replaced by this term.

Synonyms

Terms that have the same meaning. A term can have multiple synonym terms. The relationship is symmetrical and transitive. If term A is a synonym of term B, and term B is a synonym of term C, each term is a synonym of the others.

Examples

The following examples illustrate some of the term properties that you can specify to define relationships:

assigned asset

A BI report has a section called Account IDs. You assign the BI report, which is an asset, to the term Account ID, because the full definition of the term in the glossary explains the meaning of "Account ID" to the organization. The full definition of Account ID in the business glossary consists of the term, its properties, and any other information associated with the Account ID term. This information helps people who read the report understand what is being referred to in the "Account IDs" section. In this case you would set the Is Modifier property to Yes.

synonym terms

The term Billing Information has the synonyms Billing Address and Bill To. If you get a report on Billing Address but you use the term Billing Information, the synonym attribute confirms that these two terms are synonyms.

related terms

Billing Information has the related terms Address Details and Shipping Information. These related terms indicate that Billing Information is related to addresses. In contrast, if Billing Information had the related terms Invoice and Receipt, then the concept of Billing Information is related to financial charges.

referenced terms

The term Billing Information is contained by the category Payment Details. When you view the category Contact Details, you see Billing Information as a referenced term.

Related concepts

"Terms" on page 9

A term is a word or phrase that describes a characteristic of the enterprise. Terms are the fundamental building block of the business glossary.

Assets

IBM InfoSphere Business Glossary connects business glossary terms with information assets.

An information asset is a piece of information that is of value to the organization and can have relationships, dependencies, or both with other information assets. With InfoSphere Business Glossary, you can assign assets to terms in the glossary.

By assigning an asset to a term, you indicate that there is some relationship between the term and the asset that has meaning to your enterprise.

When users of InfoSphere Business Glossary view the details of a term, they can see a list of assets that are assigned to that term. Users can also search for assets and display details about assets with InfoSphere Business Glossary .

Assets that are assigned to glossary terms can be of two types:

- Assets in the IBM InfoSphere Information Server metadata repository
- Assets that reside outside the metadata repository, called external assets

Assets in the metadata repository

The IBM InfoSphere Information Server metadata repository contains many different types of information assets. You can assign these assets to terms in the business glossary and you can view information about the assets from within IBM InfoSphere Business Glossary.

The metadata repository contains many different types of assets, including physical and logical model assets, implemented data resources, and business intelligence (BI) assets.

With InfoSphere Business Glossary you can search for repository assets, and you can view the following kinds of information about repository assets:

- Lists of assets that are assigned to terms
- Lists of all assets of a particular type in the repository
- Details about a particular asset, displayed on its own asset information page

Related information

 [Common metadata assets](#)

External assets

IBM InfoSphere Business Glossary enables you to create references from business terms to entities that are outside of the IBM InfoSphere Information Server metadata repository. These entities are referred to as assigned external assets.

An assigned external asset might be a business process model or UML model that is stored in an asset management system, a Web service, or a quarterly report on a shared network drive. The ability to assign business terms to these types of assets extends the value of InfoSphere Business Glossary in the following ways:

- Enables the glossary to give meaning to any technical assets of interest to the business, regardless of where they exist.
- Helps business users understand the meaning of all technical assets that are used in organizational processes.

External assets differ from assets that are in the metadata repository in the following ways:

- You cannot search or browse external assets by using IBM InfoSphere Business Glossary because external assets are outside of the metadata repository.
- You cannot assign stewards to external assets.
- External assets exist only in relationship to a term. If you delete the term, all information about the external asset is also deleted from the metadata repository.

- External assets cannot be included in displays of business lineage or data lineage. If you want to include information about an external asset in a display of business lineage, you can define the external asset as an extended data source from within IBM InfoSphere Metadata Workbench.

With external assets, you can do the following actions:

- You can assign an external asset to a term. You can describe the asset in enough detail for business users to identify it, locate it, and decide whether the asset is relevant and merits further investigation.
- While viewing a term, you can see the external assets that the term is assigned to. You can also see basic information about an external asset.

You can also assign external assets to terms by using the InfoSphere Business Glossary REST API or by specifying the assignment in an imported XML file.

Example

Consider the following example of how an organization might use external assets:

A company wants to add business meaning to software assets such as logical models and Web services by assigning business terms to them. The business glossary author for the “Customer Activity” term is asked to document some of the key software assets and related information in this subject area.

The software assets are stored in IBM Rational Asset Manager and include:

- the IBM WebSphere® Business Modeler model for “Modifying Account Information”
- the Web services “Change Address” and “Add Additional Address”
- the logical model “Customer Account Information”

In addition, a text document that describes corporate rules for modifying account information is stored in a content management system.

The glossary author, when creating the term, assigns these assets to the term with links to the Rational Asset Manager page and to the location of the text document in the content management system. Later, a business analyst, when examining a term, is able to find the relevant Web services, the process model, the logical model, and the corporate rules.

Glossary roles and permissions

A combination of user roles and category permissions control the functions that users can perform with the glossary and define user authority with respect to glossary content.

IBM InfoSphere Business Glossary supports role-based access to the glossary. These roles, sometimes in combination, control the way that a given user can interact with the glossary. The roles are of the following types:

- IBM InfoSphere Information Server security roles
- InfoSphere Business Glossary workflow roles
- IBM InfoSphere Information Server stewards

Security roles determine what type of information in the glossary a user can access and what kinds of changes a user can make to the glossary. For example, only a

Business Glossary Administrator can make configuration changes to the glossary. As another example, a Business Glossary Basic User cannot view information about data models or implemented data resources. The IBM InfoSphere Information Server suite administrator assigns security roles to users.

Workflow roles take effect only if the InfoSphere Business Glossary workflow feature is enabled. The two workflow roles are Editor and Publisher. A user with the Editor role can change the glossary. A user with the Publisher role can approve and publish glossary content. If workflow is not enabled, the Editor and Publisher roles are not required to publish glossary content.

Glossary terms and categories, and other metadata repository assets, can be assigned stewards. Stewards are responsible for the definition, purpose, and use of assets in the metadata repository. The capabilities of a steward are determined by the security role, category permissions, and if workflow is enabled, the workflow role assigned to that steward. Designating a user to be a steward does not confer any software capabilities to that user.

The InfoSphere Business Glossary Administrator assigns workflow and steward roles.

InfoSphere Business Glossary supports defining access to only certain categories. This access is called category permissions. Category permissions combined with assigned roles define what glossary content a user can interact with. For example, users who are Business Glossary Authors can edit information only in the categories to which they have been assigned category permissions.

Security roles

Security roles give business glossary users varying levels of authority to perform tasks.

The following table lists the IBM InfoSphere Business Glossary security roles. Each role is described in more detail following the table.

Role	Description
"Business Glossary Administrator role" on page 20	Sets up and administers the glossary
"Business Glossary Author role" on page 20	Creates and edit terms and categories
"Business Glossary User role" on page 21	Views glossary content, including information about any type of asset in the metadata repository
"Business Glossary Basic User role" on page 21	Views glossary content, but cannot view information about other types of assets in the metadata repository
"Business Glossary Asset Assigner role" on page 22	Assigns assets in the metadata repository to glossary terms and categories from other products in the InfoSphere Information Server suite

You assign InfoSphere Business Glossary security roles from the IBM InfoSphere Information Server web console.

Elements of the InfoSphere Business Glossary user interface are displayed to users who have authorization to do the tasks provided by the interface. For example, only Business Glossary Administrators can see the Administration tab.

Business Glossary Administrator role

Users with the Business Glossary Administrator role can set up and administer the glossary so that other users can find and analyze the information they need. Business Glossary Administrators have access to all menus and tabs provided by the InfoSphere Business Glossary browser, including the Administration tab. Most administrative tasks can be accessed from the Administration tab.

Administrators can do the following tasks in addition to the tasks that Business Glossary Authors, Business Glossary Users, and Business Glossary Basic Users can do:

- Customize the business glossary display and settings, including items such as:
 - Which terms are displayed based on their status
 - Whether a record of changes to terms is stored and displayed
 - Whether the glossary is connected to IBM Cognos 8 Go! Search, if available
- Create, edit, and delete the following items in the glossary:
 - All terms and all categories, regardless of author
 - Custom attribute definitions
 - External asset types
 - Labels
- Manage stewards: create stewards from users and groups, delete stewards, and assign assets to stewards
- Restrict certain users from viewing specific categories and their contents
- Restrict certain users from editing specific categories and their contents
- Import and export glossary content from or to external files
- Assign workflow roles to users

The Business Glossary Administrator role is the most privileged InfoSphere Business Glossary role.

Business Glossary Author role

Users with the Business Glossary Author role can create and edit terms and categories, and can assign assets to terms.

Authors can perform the following tasks in addition to the tasks that can be performed by Business Glossary Users and Business Glossary Basic Users:

- Create and edit categories and terms
- Delete categories and terms
- Assign stewards to terms, categories, and other assets
- Assign information assets to terms. These assets can be assets that are stored in the metadata repository, such as implemented data resources, and external assets.

The Business Glossary Author role is often assigned to stewards.

Business Glossary User role

Users with the Business Glossary User role can view the terms, categories, and stewards in the glossary, including the assets that are assigned to terms and categories. Users with this role can view glossary content from any interface that provides access to InfoSphere Business Glossary except from the glossary administrative interface.

Users can do the following tasks in the glossary browser in addition to the tasks that Business Glossary Basic Users can do:

- Browse the structure of data sources that are related to terms
- View the details of categories and terms, including assigned assets
- View assets in the metadata repository (whether they are assigned to terms or not)
- View the business lineage of a term (if supported by the configuration)
- View a list of assets that are managed by a particular steward, including assets other than terms and categories
- Search the glossary for other assets in addition to terms and categories

Business Glossary Basic User role

Users with the Business Glossary Basic User role can view the terms, categories, and stewards in the glossary, but information about other types of metadata repository assets is not available to them. In this way, users who do not need to know about the relationship of terms and categories to other assets are not presented with unnecessary information.

For example, the assets that are assigned to terms are not shown in the display of term details to users with the Business Glossary Basic User role. In addition, when users with this role search for assets, they can search only for terms and categories, and not other kinds of assets. Finally, some views that are available to other user roles are not available: for example, Business Glossary Basic Users cannot view the data source tree or business lineage.

Users with this role can view glossary content from any interface that provides access to InfoSphere Business Glossary except from the glossary administrative interface.

Business Glossary Basic Users can do the following tasks in the glossary browser:

- Browse the structure of categories and terms
- Search the glossary for categories and terms
- View the details of categories and terms, excluding assigned assets
- Send feedback to the administrator about categories and terms
- Find terms in IBM Cognos 8 Business Intelligence (if supported by the configuration)
- View a list of assets that are managed by a particular steward, excluding assets other than terms and categories

The Business Glossary Basic User role is the least privileged InfoSphere Business Glossary role.

Business Glossary Asset Assigner role

The Business Glossary Asset Assigner is a security role designed for users of other products within the InfoSphere Information Server suite. Some of these products include features that enable users to interact with business glossary content directly from the other product, without requiring the user to log in to InfoSphere Business Glossary. If users of such a product are assigned the Business Glossary Asset Assigner role, they can assign information assets to terms from within the interface of the other product. For example, users of IBM InfoSphere Information Analyzer can assign assets to business glossary terms and categories.

Related concepts

“Workflow roles”

You can assign workflow roles to IBM InfoSphere Business Glossary users. These roles provide users with varying capabilities related to the stages of deploying a glossary if the workflow feature is enabled.

Related information

 [Assigning security roles in the Web console](#)

Workflow roles

You can assign workflow roles to IBM InfoSphere Business Glossary users. These roles provide users with varying capabilities related to the stages of deploying a glossary if the workflow feature is enabled.

Business Glossary Administrators can enable or disable the workflow feature. If workflow is enabled, the administrator can assign the Publisher role to one or more InfoSphere Business Glossary users. Only users who have the Publisher role can make glossary content available to users who do not have editing privileges when workflow is enabled. If workflow is not enabled, then changes made by users who have permission to edit the glossary are made immediately.

Related concepts

“Security roles” on page 19

Security roles give business glossary users varying levels of authority to perform tasks.

“Category permissions” on page 23

Business Glossary Administrators can restrict specific users from accessing certain glossary categories.

Stewards

Stewards are users or groups of users who are responsible for the definition, purpose, and use of assets in the metadata repository.

A steward who works with the glossary typically has the Business Glossary Author role and is assigned to the assets for which the user or group is the appropriate contact.

You can assign stewardship to a user or user group, but the assigned steward does not have to be a user of the glossary. For example, a steward could be a steward for a physical model from ERwin or for an asset from IBM InfoSphere Information Analyzer or IBM InfoSphere DataStage®.

An asset can have only one steward.

When you view the details page of an asset that has a steward, a link to its steward is displayed. That link opens the details page of the steward and contains the contact information for the steward that is configured in IBM InfoSphere Information Server.

Category permissions

Business Glossary Administrators can restrict specific users from accessing certain glossary categories.

By default, all IBM InfoSphere Business Glossary users can view all the categories and terms in the glossary. However, the Business Glossary Administrator can specify a subset of categories that only specific users are permitted to view. In this way, the Glossary Administrator can restrict access to certain categories and their associated content to certain glossary users.

InfoSphere Business Glossary supports different types of category permissions, depending on whether the workflow feature is enabled or disabled. If the workflow feature is disabled, the Business Glossary Administrator can set permissions known as Glossary Permissions. If the workflow feature is enabled, the Business Glossary Administrator can set two types of permissions: Development Glossary Permissions and Published Glossary Permissions.

You can set category permissions for users who have the following security roles:

- Business Glossary Basic Users
- Business Glossary Users
- Business Glossary Authors
- Business Glossary Asset Assigners

Business Glossary Administrators have unlimited access to all categories in both the development and published glossaries, and you cannot restrict their access.

The following table describes each type of permission:

Table 2. Types of category permissions

Permissions type	Workflow enabled or disabled	Description	Results for categories not authorized to the user
Glossary Permissions	Disabled	Determines the categories and category content that users with any security role besides Business Glossary Administrator are permitted to view when the workflow feature is disabled. Users with the Business Glossary Author role can create or modify terms or subcategories contained by the categories to which they have permission. Users with the Business Glossary Asset Assigner role can assign assets to terms that are contained by the categories to which they are assigned permission.	<ul style="list-style-type: none"> • The category and its associated content are not included in search results. • The category and its associated content do not appear in other glossary displays, such as the category tree or context. • If the user is a Business Glossary Author, the user cannot create or edit terms in the category, create subcategories of the category, or otherwise associate terms or other assets with the category.

Table 2. Types of category permissions (continued)

Permissions type	Workflow enabled or disabled	Description	Results for categories not authorized to the user
Development Glossary Permissions	Enabled	Determines the categories and category content that users assigned to be glossary Editors or Publishers can view, edit, and modify in the development glossary. Only Business Glossary Authors can be assigned permissions to categories in the development glossary.	<ul style="list-style-type: none"> • The category and its associated content are not included in search results. • The category and its associated content do not appear in other glossary displays, such as category trees or context, and displays of draft, pending approval, and approved terms. • Because the user cannot view any content in the restricted category, the user, even if a glossary Editor, cannot create or edit terms in the category, create subcategories of the category, or associate terms and other assets with the category. • If the user is a Publisher, the user cannot approve, send back to draft, or publish any content in a restricted category.
Published Glossary Permissions	Enabled	Determines the categories and category content that users with any security role besides Business Glossary Administrator are permitted to view in the published glossary when the workflow feature is enabled.	<ul style="list-style-type: none"> • The category and its associated content are not included in search results. • The category and its associated content do not appear in other glossary displays, such as the category tree or context.

You can set category permissions for individual users or for user groups. To set permissions, you select the appropriate permissions type from the InfoSphere Business Glossary **Administration** page.

Category permissions are inherited from parent categories to subcategories and their contents. Therefore, if the permissions for a user are changed and the user no longer has access to a certain parent category, that user also no longer has access to any subcategories or terms that are descendents anywhere in the category tree that starts with that parent category. In addition, if a glossary author changes the parent category of a term or subcategory, only users who are permitted to access the new parent category can access the term or subcategory.

Category permissions are enforced in the InfoSphere Business Glossary browser, in IBM InfoSphere Business Glossary Anywhere, and by the InfoSphere Business Glossary REST API.

User groups are included in the set of users for which you can define access. Any individual user who is a member of a user group and who has not been assigned a specific InfoSphere Business Glossary security role has permission to access only the categories and terms that are permitted to be seen by the group. If a member of a user group also has another security role assigned, the most privileged role determines category permissions. If a user is part of a user group that has the Business Glossary Basic User or Business Glossary User role, and is also assigned the same role as an individual user, then that user can be assigned category permissions that are different from those of the group.

After you have configured category permissions, the selected users can access only those categories and contained terms for which they have permission, starting with their next glossary session. In the category tree on each permissions configuration page, the visual icon displayed next to the category name changes if the category is available to no users or only some users.

Related concepts

“Workflow roles” on page 22

You can assign workflow roles to IBM InfoSphere Business Glossary users. These roles provide users with varying capabilities related to the stages of deploying a glossary if the workflow feature is enabled.

Chapter 4. Planning, designing, and deploying a glossary

A business glossary is an authoritative dictionary of the terms and relationships that are used throughout the enterprise. One of the main benefits of a well-designed business glossary is increased trust and confidence in enterprise information.

Development of a business glossary is both scalable and flexible. IBM InfoSphere Business Glossary can contain and display rich semantic information that describes business language and its relationships to information assets. However, a simple glossary can be deployed with just categories and terms. A useful approach for deploying glossary content is to start with such language-based assets and later expand the glossary contents and relationships.

Terms and categories can be imported into the glossary in a variety of methods and formats with InfoSphere Business Glossary. In addition, you can import a glossary model that is suited to your industry with an IBM Business Glossary Pack component of IBM Industry Models. You can also convert BI model and logical data model assets that have been imported into the metadata repository into terms and categories, and you can convert IBM InfoSphere Data Architect naming model words that have been imported into the metadata repository into terms.

A team of subject matter experts, data architects, and business analysts form a governance team that guides the development and maintenance of a glossary. When planning the glossary structure, the team considers the following questions:

- What categories and terms are needed? Which categories contain which terms?
- Are there existing categories and terms that can be imported into the glossary?
- Which categories are the top-level categories, and which are subcategories?
- Which glossary properties should be used to express how concepts are related to one another?
- What custom attribute fields should be defined in the glossary to capture additional types of information relating to my organization?

If you can answer these questions before you create the glossary structure, you can build a structure that is simple for users to understand and that supports your enterprise goals.

In addition to categories and terms, the business glossary also contains information about other assets such as database tables, jobs, and reports that are in the metadata repository. You can decide in advance which assets are related to which terms, which terms are related to other terms, and which terms refer to other terms. Alternatively, you can wait until after you build the glossary structure to make these decisions.

Do the following steps to plan, build, and make your glossary available to the enterprise:

1. “Establish a glossary governance team” on page 28
2. “Design the category structure of the glossary” on page 30
3. “Gather preliminary information” on page 31
4. “Design and develop glossary content” on page 34

5. "Customize the glossary environment" on page 38
6. "Populate the glossary with categories and terms" on page 38
7. "Populate the metadata repository with other assets" on page 40
8. "Assign stewards" on page 42
9. "Make the glossary available to the enterprise" on page 43

Related information

Glossary concepts

You should be familiar with certain concepts before you start using IBM InfoSphere Business Glossary.

Establish a glossary governance team

Glossary governance refers to the procedures that your organization uses to maintain oversight and accountability of the glossary contents. A multidisciplinary team should be responsible for glossary governance.

To get the correct term and category content into the business glossary, identify the people who know the most about the subject areas in your enterprise.

Typically, a variety of people are involved in glossary design and maintenance:

- Subject matter experts who understand the business use of the terms, their dependencies, and their relationships to other terms. They create and define new terms.
- Business analysts who know the business definitions of terms for each business entity and who receive requirements for delivering information to business audiences. The analysts work with subject matter experts to establish a list of terms that represent the most common words used in reports, applications, and general communication. They ensure that the term definition is consistent with the goals of the enterprise.
- Data architects who understand the physical and structural aspects of the data sources that terms might be assigned to. They find the terms or the assets such as database tables, jobs, and other assets that should be assigned to the term. They establish the relationships between terms and their physical storage location.
- Compliance officers who are in charge of overseeing and managing compliance issues within an organization. They ensure that term definitions and relationships to other terms and assets conform to business policies and legal regulations.

Related information

Glossary roles and permissions

A combination of user roles and category permissions control the functions that users can perform with the glossary and define user authority with respect to glossary content.

Define glossary workflow roles

Glossary users, typically members of the glossary governance team, can be assigned roles for creating and editing, approving, and publishing glossary content.

IBM InfoSphere Business Glossary supports a phased process of developing and deploying glossary content with a workflow feature. The workflow feature is optional. When the workflow feature is enabled, changes and additions to the business glossary are made in the following distinct phases of an iterative process:

1. Creation
2. Approval
3. Publishing

After initial publication, glossary content can be revised and republished on an ongoing basis, based on the needs of your enterprise.

When the workflow feature is enabled, InfoSphere Business Glossary displays two versions of the glossary to users with specified permissions:

Development glossary

The version of the glossary that contains glossary content that is being created or revised but that has not been published. Only users who have the Business Glossary Author or Business Glossary Administrator security roles can view the development glossary. The specific content that they can view is determined by additional development glossary permissions.

Published glossary

The version of that all glossary users, with any InfoSphere Business Glossary security role, can view. The specific content that they can view is determined by additional published glossary permissions.

With the workflow feature, specific business glossary users who are part of the glossary governance team are assigned the workflow roles of Editor and Publisher. When workflow is enabled, at least one user should be designated a glossary Editor and one user should be designated a glossary Publisher. The Business Glossary Administrator assigns these roles.

Users with the workflow Editor role can create and edit terms and categories. After completing the term or category definition, the Editor sends the new or changed content to the Publisher. The Publisher approves the content or rejects it by sending it back to draft state. After all content visible to the publisher that is being worked on in the development glossary is approved, the Publisher can publish it. After it is published, this content which formerly could be seen only in the development glossary can be seen in the published glossary. After the new or changed content is published, all glossary users who have permissions to access the affected categories can see the changes.

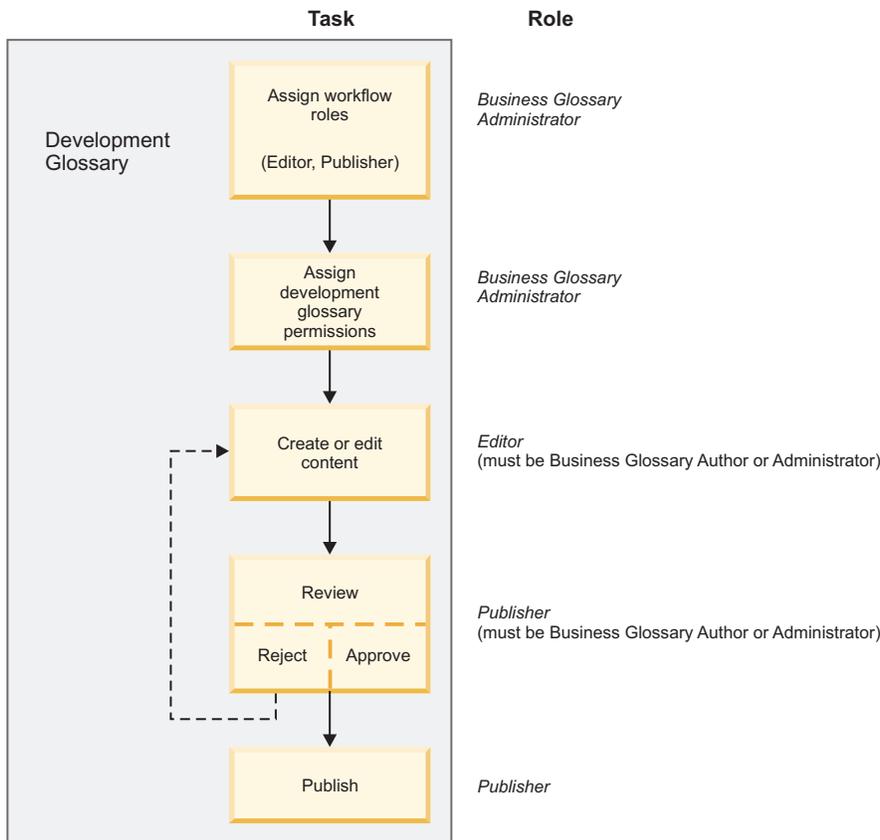


Figure 1. Workflow process

It is possible to assign both the Editor and Publisher roles to a single user. It is also possible to assign both the Editor and Publisher roles to multiple users. You can assign different development glossary category permissions to different users who have the Editor role or Publisher role, such that they are responsible for specific subsets of the business glossary.

If the workflow feature is not enabled, changes and additions to glossary content are made available to users as soon as they are saved or imported, based on the value of the status property. Content that is still undergoing revision can be hidden from users through the use of the this property.

Related information

Workflow roles

You can assign workflow roles to IBM InfoSphere Business Glossary users. These roles provide users with varying capabilities related to the stages of deploying a glossary if the workflow feature is enabled.

Deploying glossary content when workflow is enabled

If workflow is enabled, glossary content must go through an approval and publication process to be made available to users.

Design the category structure of the glossary

Data architects and subject matter experts establish a hierarchy of categories that reflects how a user might intuitively look for information about the business.

A common strategy is to divide the business by subject areas, such as customers and products. This approach is effective for organizations that implement

enterprise-wide data governance, customer data integration (CDI), or master data management (MDM) projects. A second strategy might be to divide the top-level categories by departments such as Marketing, Finance, and Human Resources. For large companies that have independent business units, the strategy might be to organize the business units into top-level categories.

If categories and terms are in multiple languages, each country or language should be a top-level category. This design enables users to search within the top-level category that is appropriate for their language. The subcategory structures of each language should be parallel.

Subcategories should be organized according to business areas and how users might think about where to find the term.

When terms are displayed in the browser interface of IBM InfoSphere Business Glossary, the context, or path, of the term can add important information about the meaning of the term. For example, the context for the term Finance Service Repayment Type is Marketing >> Geographies >> NE Region. The context indicates that the term is contained in the category Geographies, which is a subcategory of the category Marketing.

In addition to defining a term as being contained by a particular category, you can also specify that a particular term is referenced by a category other than the category that contains it. This provides another way of associating terms with categories. If, for example, there are two categories that have some relationship to the term, one category might be the parent category of the term, and the other category might be a referencing category.

Labels also provide another method of grouping terms and categories together, other than the category structure.

Related concepts

“Populate the glossary with categories and terms” on page 38

After you have decided on a category structure and which terms each category contains, either create the categories and terms, or import them into the glossary.

“Define labels for terms, categories, and other assets” on page 37

You define labels when you want to provide a way for users to categorize any type of asset in the metadata repository. Labels can be used in search and filtering.

Related information

 [Accessing the glossary browser](#)

[Categories](#)

A category is like a folder or directory that organizes your glossary content.

Gather preliminary information

Starting the glossary effort by leveraging existing content can accelerate deployment of the glossary. Determine the sources of content for your glossary and for information assets related to glossary content.

Gather sources for categories and terms

You can populate your glossary with categories and terms that already exist in your enterprise or that come from external sources.

Categories and terms have many properties associated with them such as descriptions, parent category, related terms, and custom properties such as labels and custom attributes.

You can import categories, terms, and their properties from the following sources:

- Existing lists of categories, terms, and custom attributes, or an existing data dictionary

Categories and terms from existing lists or from a data dictionary must be in a format that can be imported into the business glossary. The format can be either extensible markup language (XML) or comma-separated value (CSV). You can download import templates that are in XML or CSV format from IBM InfoSphere Business Glossary.

The differences between the two formats are:

XML The XML format is more comprehensive and robust than the CSV format. This format lets you create custom attributes, links to stewards, and links to assets.

CSV The CSV format is suitable for someone who does not have experience with the XML language.

Start with a category structure that has only top-level categories and one level of subcategories to make it easy to populate the CSV file.

You can design a job in IBM InfoSphere DataStage to extract terms and categories from a data source and to produce a file in a CSV or an XML format that is compatible with InfoSphere Business Glossary.

- IBM Industry Models

If your enterprise has not previously created any terms and categories, you can use IBM Industry Models, a collection of prepared glossary models for various industries such as finance, banking, health care, and insurance. The models typically include the following features:

- A comprehensive list of terms and their definitions for your business
- A data warehouse model with assets that have dependencies on a glossary with categories and terms

Terms and categories are provided as naming model (.ndm) or XML files that you can import directly into the metadata repository. You can import by using the IBM InfoSphere Business Glossary import wizard (for XML files) or the glossary import command (for XML or .ndm files).

Note: IBM Industry Models are large and often require that you pick and choose which assets are needed for your enterprise. Before import, enterprises typically work with model consultants to edit the model so that it has only those assets that are needed by the enterprise. Pre-import editing makes it easier to manage the assets that you import into the glossary.

- Logical data models

You can import logical data model assets into the metadata repository by using IBM InfoSphere Metadata Asset Manager. Then, you can use the **ldm2bg** command with the asset management command line interface to convert logical model assets into terms. With this command, asset-to-term assignments are automatically generated between the generated terms and the logical model elements.

- Business intelligence (BI) models

You can import BI models into the metadata repository by using IBM InfoSphere Metadata Asset Manager or Import Export Manager. Then, you can use the

bi2bg command with the asset management command line interface to convert BI model assets into categories and terms.

- You can import InfoSphere Data Architect naming models (.ndm files) into the metadata repository by using the **glossary import** command with the asset management command line interface to convert naming model words into terms.

Related concepts

Categories

A category is like a folder or directory that organizes your glossary content.

Terms

A term is a word or phrase that describes a characteristic of the enterprise. Terms are the fundamental building block of the business glossary.

 [Import command for glossary assets](#)

 [Generating glossary content from business intelligence models](#)

“Populate the glossary with categories and terms” on page 38

After you have decided on a category structure and which terms each category contains, either create the categories and terms, or import them into the glossary.

Related reference

Importing and exporting glossary content

Glossary administrators can import and export glossary content to and from external files. Using external files, you can edit glossary content, bring content into the glossary from other sources, and transfer content from one glossary to another.

 [Importing and exporting glossary content](#)

Gather sources for other assets

You can assign technical information assets to terms to give the assets business meaning. Identify the sources of these assets.

Before you can assign assets to terms, the assets must be electronically accessible, either by being in the IBM InfoSphere Information Server metadata repository or, if the asset is an external asset, by being accessible from a local file or over a network connection. If the assets are in the repository, you can view and select them from within IBM InfoSphere Business Glossary . With external assets, you must identify a way to access the asset electronically (such as a network path or a URL) so that you can provide a link to it.

Assets that are in the metadata repository can come from the following sources:

- IBM Industry Models in IBM InfoSphere Data Architect

The models typically include a data warehouse model. Such a data warehouse model can include assets that are associated with logical data models, physical data models, and implemented data resources. The data warehouse model can also already include a glossary with categories and with terms that are assigned to those assets.

- Metadata from independent software vendors

You can import assets into the metadata repository by using IBM InfoSphere Metadata Asset Manager and an appropriate bridge. You can import metadata about the following types of assets:

- Logical data model entities such as domains and packages
- Physical data model assets such as design tables, stored physical procedures, and physical domains

- Implemented data resources such as database tables and columns
- Business intelligence (BI) metadata such as BI models

For example, you could use the ODBC 3.0 Metabroker to import metadata from databases that support the ODBC 3.0 protocol.

- Metadata that is generated by or imported by tools in the IBM InfoSphere Information Server suite.

You can generate metadata with tools such as IBM InfoSphere DataStage and QualityStage™, IBM InfoSphere FastTrack, IBM InfoSphere Information Analyzer, IBM InfoSphere Metadata Workbench, IBM InfoSphere Data Architect and IBM InfoSphere Discovery.

In most cases, this metadata will be in the metadata repository as a result of being generated and does not require an additional import process to occur. In some cases you must import the data with an appropriate IBM InfoSphere Metadata Integration Bridges bridge and IBM InfoSphere Metadata Asset Manager. For example, you could use the IBM InfoSphere Metadata Asset Manager and the IBM InfoSphere Data Architect Metabroker bridge to create data models and a corresponding business glossary for an ETL job.

External assets can come from many sources, including non-InfoSphere Information Server asset management systems and databases, web sites, and shared network drives.

Related concepts

 Importing and exporting assets by using IBM InfoSphere Metadata Asset Manager

“Populate the metadata repository with other assets” on page 40

An asset must be in the metadata repository before you can assign the asset to a term.

Design and develop glossary content

Whether you design a new business glossary or design a glossary from one or more glossaries that exist throughout the enterprise, the process is similar. When you develop the categories, terms, and their relationships, also plan what custom properties the terms need, and who the appropriate stewards should be.

Define terms

You define terms for the entire enterprise to ensure clarity and compatibility among departments, projects, or products. Follow guidelines to help ensure that you create clear and meaningful terms.

Here are some tips about creating terms:

- If the term name is long, use spaces instead of underscores or hyphens to break up the name. Otherwise, when long term names are displayed in results tables, the name does not wrap and the adjacent columns are narrow. For example, instead of “Northeast_Office_Billing_Address”, use “Northeast Office Billing Address”.
- Define terms according to the standards accepted by the International Organization for Standardization and the International Electrotechnical Commission (InterISO/IEC 11179-4):
 - Write term names in the singular form
 - State descriptions as a phrase or with a few sentences

- Express descriptions without embedded concepts and without definitions of other terms
- State what the concept of a term is rather than just what it is not
- Use only commonly understood abbreviations in descriptions
- In addition, according to ISO/IEC 11179–4, term descriptions should:
 - State the essential meaning of the concept
 - Be precise, unambiguous, and concise
 - Be able to stand alone
 - Be expressed without embedded rationale, functional usage, or procedural information
 - Avoid definitions that use other term definitions
 - Use the same terminology and consistent logical structure for related definitions
 - Be appropriate for the type of metadata item that is being defined

If departments, projects, or product lines have different meanings for the same term, review all definitions together and have subject matter experts arrive at a common definition. If a common definition is not possible, create several terms from the single term and identify the context for the term in the term name.

Terms can have the same name only if they are in different categories. In this scenario, the category that contains the term gives you added information about the term.

For example, the term Address might mean “Shipping Address” to Distribution, “Bill To Address” to Accounting, and “Contact Address” to Sales. You might define these in either of the following ways:

- Create a single category with different terms

In the same category, create terms “Shipping Address”, “Bill To Address”, and “Contact Address”. In the Short Description and Long Description fields of each term, give a definition that is specific to the relevant department.

This method lets you create terms that have a unique definition.
- Create separate categories where each category contains a term with the same name

In the Distribution, Accounting, and Sales categories, create the term Address. Each term is contained by a different category, which indicates that the term definition is specific to each department.

This method combines several term definitions into a single definition. To understand the meaning of a term, you must look at the category that contains it.

Also, when developing term names, be familiar with how users will find and display terms with the glossary tools. For example, terms such as "Billing Account Number" and "Account Number" will both be displayed high up in the search results for the string "Account Number." Knowledge of how users will access the terms will help you determine when you should add qualifying words to term names and when you might want to include more than one explanation in term descriptions.

Related concepts

“Design the category structure of the glossary” on page 30

Data architects and subject matter experts establish a hierarchy of categories that reflects how a user might intuitively look for information about the business.

Terms

A term is a word or phrase that describes a characteristic of the enterprise. Terms are the fundamental building block of the business glossary.

Related information



Examples of good and poor term definitions according to ISO standards

Relate terms to terms

You can relate a term to another term to provide users with other terms that might give additional information.

You can define relationships of terms to other terms:

- Different terms with the same meaning can be defined as synonyms.
- Terms that are not synonyms, but that are related in some other way, can be defined as related terms.
- Terms can be assigned to terms.
- Terms that are no longer in use can be given a "replaced by" relationship with another term that has been given deprecated status.

Typically, the subject matter expert with overall knowledge of the glossary decides which terms to relate to other terms.

You can define the relationships when you create the term in IBM InfoSphere Business Glossary or in a glossary file that you import.

If you plan to use IBM Rational Data Architect as your import tool, you can use this tool to relate the terms before you import into the business glossary. The relationship between the terms persists in the business glossary.

Related information

Relationships

Some term and category properties define relationships among terms, categories, and other assets in the metadata repository.

Define custom properties

You can define custom properties for terms and categories. The custom properties can be custom attributes or labels.

IBM InfoSphere Business Glossary has a set of standard properties that you can use to describe the terms and categories that you create. If these standard properties are insufficient for your needs, you can define custom properties.

Custom properties consist of the following types:

- Custom attributes
- Labels

A custom attribute is an additional property that you can define to help describe terms and categories. Labels are keywords that you can define to help describe any type of asset in the metadata repository. Users can use both custom attributes and labels to refine a search in the business glossary. Users can also browse a list of labels and drill down to find which assets have a particular label applied to them.

Related information

Custom properties

Custom properties are properties that must be configured before they are available for use by term and category authors.

Define custom attributes for terms and categories

You define custom attributes when you want to create additional properties to describe a term or category.

Custom attributes are properties of categories and terms that you create if you want to extend the meaning of a term or category beyond what you can define with the standard glossary attributes such as name, parent category, and description. For example, you might create a custom attribute called Data Sensitivity with predefined enumerated values 1 through 5, with 5 as the highest data sensitivity and the greatest security impact. You can also create custom attributes that accept string values, instead of enumerated values, that the author of the term can specify.

You can specify whether a custom attribute is for terms, categories, or both.

When a custom attribute has been defined, it will appear as a property that must be specified when an author creates or edits a term or category.

Related concepts

Custom attributes

Custom attributes are properties of categories and terms that you can create if the standard properties do not meet your needs.

Define labels for terms, categories, and other assets

You define labels when you want to provide a way for users to categorize any type of asset in the metadata repository. Labels can be used in search and filtering.

Labels provide a method by which metadata repository assets of all types can be categorized. For example, you might want to define labels that correspond to geography, line of business, project names, or applications. Define labels when you want assets of many different types to be grouped together. You can assign multiple labels to an asset.

Glossary users can display a list of all assets that have a particular label.

Business Glossary Administrators can define labels for the entire glossary from within IBM InfoSphere Business Glossary or by importing them from an XML file. Once the labels are defined within the glossary, users with the appropriate roles can assign any of the defined labels to assets. In addition to assigning labels to assets from within IBM InfoSphere Business Glossary, users with the Business Glossary Asset Assigner role can assign labels to assets from within other tools in the IBM InfoSphere Information Server suite.

You can also assign labels in an XML or CSV file that you import.

Related information

Labels

Labels are simple, short descriptors for assets that have something in common that is meaningful to your enterprise. Labels can be used in search and filtering.

Select users to be stewards

Select a user or user group to be a steward of a term, category, or other asset in the metadata repository. Stewards are responsible for the definition, purpose, and use of the asset.

Typically, the data architect decides who should be the steward of a term, category, or other asset in the metadata repository.

Choose stewards who have expertise in the subject area of the term, category, or other asset.

Related concepts

Stewards

Stewards are users or groups of users who are responsible for the definition, purpose, and use of assets in the metadata repository.

Customize the glossary environment

You can configure IBM InfoSphere Business Glossary to customize it for your enterprise.

The Business Glossary Administrator can configure settings so that the business glossary is set up to meet the needs of your enterprise. These settings control how the glossary appears to users and which users have access to different glossary functions and content. For example, you can configure the following items:

- Display settings, like welcome text and graphic that displays to all users upon login and name order
- Which terms to display, based on their status such as standard or deprecated
- The email address to send glossary feedback to
- Whether to display bidirectional text (for right-to-left reading languages)
- Whether to display the history of changes to terms
- Custom properties, including custom attributes and labels
- User roles and permissions
- Whether the workflow feature is enabled
- Integration with other products such as IBM Cognos Go! Search

Related information

Configuring the glossary

You can configure IBM InfoSphere Business Glossary to fit the needs of your organization.

Populate the glossary with categories and terms

After you have decided on a category structure and which terms each category contains, either create the categories and terms, or import them into the glossary.

Related concepts

Import command for glossary assets

➡ Importing and exporting assets by using IBM InfoSphere Metadata Asset Manager

➡ Generating glossary content from business intelligence models

Related reference

Importing and exporting glossary content

Glossary administrators can import and export glossary content to and from external files. Using external files, you can edit glossary content, bring content into the glossary from other sources, and transfer content from one glossary to another.

Create or import categories and terms

After the team has approved the categories and terms, use the appropriate tool either to create them or to import them into the glossary.

Tools to import categories and terms

The following tables list tools that you can use to import or to create categories and terms in your glossary. Which tool you use depends on the source of your categories and terms.

Table 3. Tools to import categories and terms into the glossary

Sources of categories and terms	Tools	Reference information
A file in a comma-separated value (CSV) format that conforms to the format as shown in the InfoSphere Business Glossary sample CSV file	InfoSphere Business Glossary	Using CSV files
	glossary import command (asset interchange command line interface)	Managing assets by using the command line
		Import command for glossary assets
A file in extensible markup language (XML) format that conforms to the InfoSphere Business Glossary schema	InfoSphere Business Glossary	Using XML files
	glossary import command (asset interchange command line interface)	Managing assets by using the command line
	Note: The XML file format includes more information associated with a term than does a CSV file.	Import command for glossary assets
logical data models	IBM InfoSphere Metadata Asset Manager	Importing and managing assets by using IBM InfoSphere Metadata Asset Manager
	ldm2bg command from the asset interchange command line interface	
business intelligence (BI) models	IBM InfoSphere Metadata Asset Manager	Importing and managing assets by using IBM InfoSphere Metadata Asset Manager
	bi2bg command from the asset interchange command line interface	Managing assets by using the command line
		Generating glossary content from business intelligence models
A file in IBM InfoSphere Data Architect naming model format (.ndm)	glossary import command (asset interchange command line interface)	Managing assets by using the command line
A glossary archive file in a metadata interchange format from InfoSphere Business Glossary, Version 8.1 or later	InfoSphere Business Glossary	Managing assets by using the command line
	glossary import command (asset interchange command line interface)	Import command for glossary assets

Tools to create categories and terms

Table 4. Tools to create categories and terms

Tool	Reference information
IBM InfoSphere Business Glossary	Authoring glossary content
IBM InfoSphere FastTrack	InfoSphere FastTrack
From within InfoSphere FastTrack, you can invoke InfoSphere Business Glossary to create terms.	
IBM InfoSphere Information Analyzer	InfoSphere Information Analyzer
From within InfoSphere Information Analyzer, you can invoke InfoSphere Business Glossary to create terms.	

Related concepts

Categories

A category is like a folder or directory that organizes your glossary content.

Terms

A term is a word or phrase that describes a characteristic of the enterprise. Terms are the fundamental building block of the business glossary.

 Import command for glossary assets

 Generating glossary content from business intelligence models

Related reference

Importing and exporting glossary content

Glossary administrators can import and export glossary content to and from external files. Using external files, you can edit glossary content, bring content into the glossary from other sources, and transfer content from one glossary to another.

 Importing and exporting glossary content

Review and revise the glossary structure

As the team develops the glossary, it can view the category structure, the terms that each category contains, and the term relationships to other assets.

Use IBM InfoSphere Business Glossary to browse and to edit categories, terms, and other assets in the glossary. You can make changes in the structure of the category tree, change term relationships, and check steward assignments.

Populate the metadata repository with other assets

An asset must be in the metadata repository before you can assign the asset to a term.

Typically, the data architect imports the assets into the metadata repository.

You can use various tools to import assets such as business intelligence (BI) reports, jobs, logical model assets, physical model assets, and implemented data resources.

Choose the tool to import the assets based on the source of the assets. For example, you could use the IBM InfoSphere Metadata Asset Manager and the IBM InfoSphere Data Architect MetaBroker to import physical data model assets (.dbm files) or logical data model assets (.ldm files) from IBM InfoSphere Data Architect. Or, if you wanted to import an IBM Cognos BI report, you could use the Cognos

BI 8 Reporting-Content Manager bridge. Then, you could convert the BI model entities to categories and terms with the **bi2bg** command (available from the asset interchange command line).

Note: External assets, which are assets that do not reside in the metadata repository, do not have to be imported before you assign them to terms.

Related concepts

- ➡ Importing and exporting assets by using IBM InfoSphere Metadata Asset Manager
- ➡ Generating glossary content from business intelligence models

Associate terms with assets

You can associate assets with terms to identify the implemented data resources, logical data model assets, physical data model assets, and business intelligence assets that are related to the term.

You associate an asset with a term by assigning the asset to the term. Assets can be of two types, depending on where they are stored:

- Assets that reside in the IBM InfoSphere Information Server metadata repository.
- Assets that do not reside in the IBM InfoSphere Information Server metadata repository. These assets are called external assets.

Related information

Relationships

Some term and category properties define relationships among terms, categories, and other assets in the metadata repository.

Assign metadata repository assets to terms

Assigning an asset to a term provides business analysts with the correct data sources that are associated with the term.

Typically, the data architect or data analyst works with the business analyst to decide which metadata repository assets are assigned to a term.

If you plan to use IBM InfoSphere Data Architect as your source of assets, you must import the model with IBM InfoSphere Metadata Asset Manager. Then you can assign the data model assets to terms with InfoSphere Data Architect.

If you use other tools to import assets into the business glossary, you can use IBM InfoSphere Business Glossary, IBM InfoSphere Metadata Workbench, IBM InfoSphere FastTrack, or IBM InfoSphere Information Analyzer to assign an asset to a term. Typically, you use InfoSphere Business Glossary to assign large numbers of assets to terms.

The following table lists tools that can assign assets to terms.

Table 5. Tools to assign assets to terms

Tool	Reference information
InfoSphere Business Glossary	Editing terms and categories
IBM InfoSphere Business Glossary Client for Eclipse	Chapter 9, "Accessing business glossary content from Eclipse applications," on page 83
InfoSphere Metadata Workbench	IBM InfoSphere Metadata Workbench

Table 5. Tools to assign assets to terms (continued)

Tool	Reference information
IBM InfoSphere FastTrack	Importing metadata into the metadata repository
IBM InfoSphere Information Analyzer	Associating imported metadata with your project

You can also define the assignment in an XML or CSV file that you import.

Related information

 Information asset actions in InfoSphere Metadata Workbench

Assign external assets to terms

You assign external assets to a term when you define the term.

You assign external assets to a term when you define a term from within IBM InfoSphere Business Glossary. You can also define the assignment in an XML or CSV file that you import.

Related information

External assets

IBM InfoSphere Business Glossary enables you to create references from business terms to entities that are outside of the IBM InfoSphere Information Server metadata repository. These entities are referred to as assigned external assets.

Assign stewards

Assign a user in IBM InfoSphere Information Server to be a steward who is responsible for the definition, purpose, and use of a term, category, or other asset in the metadata repository.

You typically assign stewards from within IBM InfoSphere Business Glossary. You can also assign stewards by using IBM InfoSphere Metadata Workbench. Using IBM InfoSphere Business Glossary is most efficient if you have many stewards to assign.

Before a user can be assigned as a steward, the user must exist in IBM InfoSphere Information Server. If the user does not already exist, that steward will not be assigned to an asset.

You create the user in InfoSphere Information Server or use the User Information MetaBroker bridge to import a list of users with their contact information. If you use this bridge, you do not need any special administrator or security role in InfoSphere Information Server.

Related concepts

Stewards

Stewards are users or groups of users who are responsible for the definition, purpose, and use of assets in the metadata repository.

 [Stewards](#)

 [Information asset actions in InfoSphere Metadata Workbench](#)

Related information

 [Creating users in the Web console](#)

 [Creating users in the Web console](#)

Make the glossary available to the enterprise

Make the glossary available to the enterprise after the team decides that the glossary is ready for use.

About this task

The last step in developing the glossary is to make it available for use in the enterprise.

Procedure

1. Depending on whether the workflow feature is enabled or disabled, you make your glossary available to users by doing the following steps within IBM InfoSphere Business Glossary:

Option	Description
If the workflow feature is enabled	The glossary Publisher publishes the entire glossary.
If the workflow feature is not enabled	The Business Glossary Administrator configures the display settings to show the standard and accepted glossary terms and categories.

2. Verify that the new categories and terms are displayed in the glossary by using the InfoSphere Business Glossary browser or by using IBM InfoSphere Business Glossary Anywhere.

Related information

Deploying glossary content when workflow is enabled

If workflow is enabled, glossary content must go through an approval and publication process to be made available to users.

Chapter 5. Logging in to IBM InfoSphere Business Glossary

You open IBM InfoSphere Business Glossary for administering, authoring, and viewing the business glossary with a web browser.

Before you begin

- You must have one of the following Business Glossary user roles: Basic User, User, Administrator, or Author.
- You must know the host server name and port for your installation of InfoSphere Business Glossary. You must also know whether your installation of IBM InfoSphere Information Server uses HTTPS. Contact your InfoSphere Business Glossary administrator or your InfoSphere Information Server administrator for this information.

Procedure

1. Open a web browser and enter a URL in the following format:

protocol://host_server:port/bg

where

protocol is one of the following:

Option	Description
https	Use this if IBM WebSphere® Application Server is configured to use Hypertext Transfer Protocol Secure (HTTPS).
http	Use this if WebSphere Application Server is configured to use Hypertext Transfer Protocol (HTTP).

The value of *host_server:port* depends on whether WebSphere Application Server clustering is set up within your services tier configuration.

Option	Description
If clustering is set up	<p><i>host_server:port</i> is the name or IP address and the port of the front-end dispatcher (either the web server or the load balancer).</p> <p>Do not use the host name and port of a particular cluster member.</p>
If clustering is not set up	<p><i>host_server:port</i> is the host name or IP address of the computer where WebSphere Application Server is installed and the port that is assigned to the IBM InfoSphere Information Server Web console.</p>

If HTTPS is enabled on the IBM InfoSphere Information Server port being connected to, then the first time that you access the glossary browser, a message about a security certificate is displayed if the certificate from the server is not trusted. Follow the browser prompts to accept the certificate and proceed to the login page.

2. Log on to the glossary browser by using your user name and password for InfoSphere Information Server.

Example

The following examples use the default IBM InfoSphere Information Server port values:

If neither HTTPS nor clustering are set up, the URL might be:
`http://myhost:9080/bg.`

If HTTPS is set up but clustering is not, the URL might be: `https://myhost:9443/bg.`

If HTTPS is not set up but clustering is, the URL might be: `http://myhost:80/bg`

If HTTPS and clustering are set up, the URL might be: `https://myhost:443/bg.`

Note: In the case of a clustered environment using HTTPS in which 80 (the default) is the port, you can omit the port number and 80 is used automatically. In the case of a non-clustered environment using HTTPS in which 443 (the default) is the port, you can omit the port number and 443 is used automatically.

Chapter 6. Administering the glossary

Administrative tasks consist of configuring the glossary to meet the needs of your enterprise and of making glossary content available to users. You perform most IBM InfoSphere Business Glossary administrative tasks from the **Administration** tab. If the workflow feature is enabled, you perform tasks related to making glossary content available from the **Development Glossary** tab.

From the **Administration** tab, you can perform tasks such as configuring the glossary and importing and exporting glossary content.

If you are using the workflow feature, you use the **Development Glossary** tab to monitor, approve, and publish glossary content.

The tabs are visible after you log in to IBM InfoSphere Business Glossary. Click a tab to display a list of tasks that you can access from that tab.

You also might use IBM WebSphere Application Server to configure the direction of text display.

Configuring the glossary

You can configure IBM InfoSphere Business Glossary to fit the needs of your organization.

You configure most aspects of InfoSphere Business Glossary from the **Administration** tab.

You can configure the following items that help define and expand the meaning of glossary terms and categories:

- labels
- custom attributes
- external asset types
- integration with IBM Cognos 8 Go!

You can configure the following settings that affect the way glossary content is displayed to users:

- the welcome text and graphic that users see when they log in
- an email address for feedback about the glossary
- display order of parts of user names
- the set of terms to display based on their status (standard, accepted, a candidate or deprecated)
- whether to display undefined properties
- whether to display a history of changes to each term

You can configure the following items that affect user capabilities:

- security roles, which define overall access rights to the glossary
- workflow roles, which give selected users approval and publishing capabilities when the workflow feature is enabled

- content permissions, which can be used to restrict the access of specific users to particular subsets of glossary categories and terms

You can also configure support for right-to-left reading languages by configuring locale settings and settings in IBM InfoSphere WebSphere Application Server.

Related tasks

Chapter 5, “Logging in to IBM InfoSphere Business Glossary,” on page 45
You open IBM InfoSphere Business Glossary for administering, authoring, and viewing the business glossary with a web browser.

Language support

IBM InfoSphere Business Glossary provides support for international languages.

The InfoSphere Business Glossary user interface appears to each user in the language that is defined in the user’s web browser. If there is no language defined in the browser or the language defined in the browser is not supported, the user interface text is displayed in the language that is selected during installation of IBM InfoSphere Information Server.

You can optionally configure InfoSphere Business Glossary to display a specific supported language regardless of the browser language settings and the setting specified during installation of InfoSphere Information Server. You configure this setting from the IBM WebSphere Application Server administrative console.

InfoSphere Business Glossary includes support for right-to-left languages. When Hebrew or Arabic are configured, the user interface layout is automatically aligned from right-to-left. Glossary content is automatically aligned, right-to-left or left-to-right, based on the first directional letter that occurs in the text of the item that is being displayed.

Configuring a specific locale

Change the setting for the IBM InfoSphere Business Glossary locale by configuring it in the IBM WebSphere Application Server administrative console.

Before you begin

You must be a WebSphere Application Server administrator.

About this task

You can set the locale specifically for users of InfoSphere Business Glossary. Users of other IBM InfoSphere Information Server products are not affected. This setting takes precedence over the setting configured in the user’s browser and over the setting configured during installation of InfoSphere Information Server.

Procedure

1. Log in to the IBM WebSphere Application Server administrative console.
2. Expand **Servers**.
3. Click **Application servers**.
4. Click the name of the server that hosts InfoSphere Business Glossary.
5. Under the **Server Infrastructure** heading, expand **Java and Process Management**.
6. Click **Process Definition > Java Virtual Machine > Custom Properties**.

7. Click **New**, and enter the following information:
 - a. In the **Name** field, type `user.iis.bg.locale`.
 - b. In the **Value** field, type a value that specifies the language and country. The value must be one of the values shown in the following table:

Value	Language
ar	Arabic
en-US	English (United States)
de-DE	German
es-ES	Spanish
fr-FR	French
he-IL	Hebrew
it-IT	Italian
ja-JP	Japanese
ko-KR	Korean
pt-BR	Portuguese (Brazil)
ru-RU	Russian
zh-CN	Simplified Chinese
zh-TW	Traditional Chinese

8. Optional: Type a description.
9. Click **Apply** or **OK** to save the changes to the local configuration.
10. Click **Save** to apply these changes to the master configuration.
11. Restart WebSphere Application Server.

Note: You must restart WebSphere Application Server for the setting to take effect.

Results

When users log in to InfoSphere Business Glossary, the user interface will appear in the language defined by the locale that you configured.

Deploying glossary content

The method you use to deploy glossary content depends on whether the workflow feature is enabled or disabled.

If the workflow feature is enabled, a user who is a glossary Publisher must publish content that is in the development glossary to make it available to the enterprise. If the workflow feature is not enabled, then changes to the glossary become available to the enterprise immediately, whenever a change is saved or content is imported.

Deploying glossary content when workflow is enabled

If workflow is enabled, glossary content must go through an approval and publication process to be made available to users.

If the workflow feature is enabled, a user who is a Publisher must approve and explicitly publish glossary content before it can be seen by other glossary users. An

exception to this is that users who have been granted development glossary permissions to the affected categories can also see the changes.

For example, if a new term, "Calculated" is added to the category "Risk" and submitted to the Publisher for approval and publishing, Business Glossary Basic Users and Business Glossary Users cannot see the term "Calculated" until the Publisher publishes this new term. In addition, a user who is a Business Glossary Author but who does not have development glossary permission to the category "Risk" also cannot see the new term until it is published. However, a user who is a Business Glossary Author who has been given development glossary permission to the category "Risk" can see the new term before it is published, but only in the development glossary.

The workflow process consists of the following steps:

1. A business glossary Editor changes content in the development glossary. This change can consist of creating a term or category, modifying an existing term or category, or marking a term or category for deletion. After the changes are saved, the new or changed term or category is in draft state.
2. The Editor sends the draft to a Publisher for approval.
3. The Publisher approves the draft or sends it back to the author for additional revision.
4. After all draft and pending approval content is approved, the Publisher publishes it. The changes then appear in the published glossary.

Related information

Define glossary workflow roles

Glossary users, typically members of the glossary governance team, can be assigned roles for creating and editing, approving, and publishing glossary content.

Approving glossary content

When workflow is enabled, users who have been assigned the Publisher role can approve draft content in the development glossary.

Before you begin

An Editor must have sent draft content to the Publisher for approval.

About this task

When a user who is a glossary Editor makes and saves a change to a term or category, the change is displayed as a draft version of the term or category in the development glossary. The Editor must send the draft version to the Publisher for approval. The next step in the workflow process is for the Publisher to approve the pending approval version. The Publisher can also decide to not approve the content, and send terms or categories back to the draft state so that the Editor can make additional changes.

Procedure

1. Click the **Development Glossary** tab to navigate to the development glossary.
2. Click **Pending Approval** to display the list of pending approval terms and categories.
3. Select one or more terms or categories to approve or send back to draft state.
4. Click **Approve** to approve the terms or categories, or click **Return to Draft** if you want the Editor to make additional changes.

Results

If approved, the selected terms and categories move to approved state. You can view the list of terms and categories in the approved state by clicking **Approved** in the development glossary navigation pane. If returned to draft, the selected terms and categories move back to the draft state. You can view the list of terms and categories in draft state by clicking **Drafts** in the development glossary navigation pane.

Publishing glossary content

If workflow is enabled, the glossary Publisher must explicitly publish new or changed glossary content before it can be viewed in the published glossary.

Before you begin

You must be a glossary Publisher. The content to be published must already be approved, and there can be no draft or pending approval content in the development glossary.

About this task

After you publish new or changed content, the content can be viewed by any glossary users who have permission to access the affected categories in the published glossary. Publishing changed categories and terms overwrites the existing versions of them in the published glossary. Also, if any terms or categories have been marked for deletion, they are deleted from the glossary when you publish.

Procedure

1. Click the **Development Glossary** tab to navigate to the development glossary.
2. Click **Publish** in the development glossary navigation pane.
3. Click **Publish**.

Results

The published glossary is updated with the changes.

Deploying glossary content when workflow is disabled

When the workflow feature is disabled, changes to glossary content are made immediately.

When the workflow feature is not used, changes to terms and categories are displayed in the business glossary as soon as a glossary author makes and saves the changes. If you import a file that contains content changes, the changes take effect as soon as the import process is complete.

Business Glossary Administrators can choose to display only a subset of terms with a particular status. In this way, you can hide terms from glossary users if they are not yet ready for use. For example, you can configure the glossary to display only terms that have Standard or Accepted status. Terms with Candidate and Deprecated status are therefore not displayed, except to Business Glossary Administrators. When a term or category with Candidate status is ready for general use, the Business Glossary Administrator can change its status to Standard or Accepted. Then the term or category becomes visible to all glossary users who have permission to access content in the affected category.

Related concepts

“Term status” on page 10

The Business Glossary Administrator can specify a subset of terms to display in the glossary based on their maturity level.

Importing and exporting glossary content

Glossary administrators can import and export glossary content to and from external files. Using external files, you can edit glossary content, bring content into the glossary from other sources, and transfer content from one glossary to another.

Each import and export method and file format has different capabilities that you should consider before deciding which to use.

You can use the import and export capabilities to do the following:

- Import a new glossary.
- Import a partial glossary to add to the existing glossary. For example, you might add a new subcategory with some contained terms.
- Update the glossary with ongoing updates from a third party system. If the glossary is updated periodically in this way while regularly being manually updated by an administrator, you must put procedures in place to ensure that changes from one source do not incorrectly overwrite changes from the other source.
- Perform large-scale glossary update or maintenance. You could export part of the glossary, edit the resulting file, and then import this modified file to update the glossary.
- Create an archive of a glossary to be deployed on another instance of IBM InfoSphere Information Server.

If the workflow feature is enabled, then imported content becomes draft content in the development glossary.

Import and export methods

Glossary administrators can use several methods to import and export glossary content to enable rapid development of a glossary or to transfer a glossary among different IBM InfoSphere Information Server installations.

You can perform the import or export task from the IBM InfoSphere Business Glossary browser or from a command line. To use a command line, you use the IBM InfoSphere Information Server command-line interface (istool).

Because glossary content is stored in the metadata repository of InfoSphere Information Server, you can also interact with glossary content with the following InfoSphere Information Server components:

- IBM InfoSphere Information Analyzer
- IBM InfoSphere Metadata Workbench
- IBM InfoSphere FastTrack
- IBM InfoSphere Business Glossary Client for Eclipse
- IBM InfoSphere Blueprint Director

Related tasks

“Exporting files” on page 71

Business Glossary Administrators can export glossary content from the IBM InfoSphere Business Glossary browser.

“Importing files” on page 71

Business Glossary Administrators can import glossary content from the IBM InfoSphere Business Glossary browser.

Related information

Create or import categories and terms

After the team has approved the categories and terms, use the appropriate tool either to create them or to import them into the glossary.

 Importing and exporting from a command line

Version compatibility for import and export files

Importing glossary content that has been exported from the current version of IBM InfoSphere Business Glossary is supported with only certain versions of IBM InfoSphere Business Glossary. The supported versions depend on the format of the file.

Table 6. Versions of InfoSphere Business Glossary you can import into, if the original file was exported from the current version

File format	Current version	Previous version
XML	Yes	No
XMI (glossary archive)	Yes	No
CSV	Yes	Yes

For example, if you export an XML file from InfoSphere Business Glossary, Version 8.7, you can modify the contents of the file in accordance with the InfoSphere Business Glossary schema, and import the resulting file into the same or another instance of InfoSphere Business Glossary, Version 8.7. However, you cannot import the resulting file into an instance of InfoSphere Business Glossary, Version 8.5.0 or any earlier version of InfoSphere Business Glossary.

Related reference

“Import and export file formats”

Glossary administrators can decide which file format to use for IBM InfoSphere Business Glossary export and import based on the reasons for exporting and importing and based on the type of content that needs to be imported.

Import and export file formats

Glossary administrators can decide which file format to use for IBM InfoSphere Business Glossary export and import based on the reasons for exporting and importing and based on the type of content that needs to be imported.

You can export and import categories and terms by using any of these file formats: CSV, XML, or glossary archive (XMI).

Table 7. File formats available for import and export to InfoSphere Business Glossary

File Format	When to use	What the file can define
CSV file (comma-separated values)	Use a CSV file to import glossary content from a CSV file that has been generated from other software applications such as spreadsheet programs, and to export glossary content as rows of comma-separated values so that you can edit the content with a spreadsheet program. The CSV file format has some limitations on the type of glossary content that can be defined in it.	The file can define categories, terms, references to stewards, and the values of custom attributes of categories and terms. The file cannot define custom attribute definitions or some relationships. You can change the values of most, but not all, term and category properties.
XML file (Extensible Markup Language)	Use an XML file to import or export all or part of a glossary so that you can modify it outside of a running instance of IBM InfoSphere Business Glossary. You can generate an XML file for import with other software tools, as long as the file conforms to the InfoSphere Business Glossary XML schema. The XML file format is the most versatile of all IBM InfoSphere Business Glossary export and import file formats.	The file can define any kind of glossary content, including new or existing terms, categories, their properties, custom attributes, and relationships.
XMI file (XML Metadata Interchange)	Use an XMI file (glossary archive file) to transfer glossary content to and from different instances of InfoSphere Business Glossary	The file includes all glossary content but cannot be used to define new terms or categories. The XMI file can be used to change properties of existing terms or categories with an accompanying mapping file.

The following tables show which category and term properties can be imported by each method.

Table 8. Category properties that can be added or changed, by import method

Category property	CSV file	XML file	XMI file
Name	Yes, if being added for a new category only. Names of existing categories cannot be changed.	Yes	Yes
Long descriptions	Yes	Yes	Yes
Short descriptions	Yes	Yes	Yes
Subcategories	Yes	Yes	Yes
Parent category	Yes, if being added for a new category only. Parent categories of existing terms or categories cannot be changed.	Yes	Yes
Referenced terms	No	Yes	Yes
Contained terms	Yes	Yes	Yes
Custom attribute	Can be assigned to a category but cannot be defined.	Yes. can be assigned to a category and defined.	Yes, can be assigned to a category and defined.
Custom attribute value	Yes, if the custom attribute already exists in the target metadata repository. If the custom attribute does not exist, the import fails.	Yes	Yes

Table 8. Category properties that can be added or changed, by import method (continued)

Category property	CSV file	XML file	XMI file
Reference to steward	Yes, if the user or user group already exists in the target metadata repository. If the user or user group does not exist, the import fails.	Yes, if the user or user group already exists in the target metadata repository. If the user or user group does not exist, the steward relationship is not created but other content is imported successfully.	Yes, if the user or user group already exists in the target metadata repository. If the user or user group does not exist, the steward relationship is not created but other content is imported successfully.
Labels	Yes, can be assigned to a category if the label already exists in the target metadata repository. If the label does not exist, the import fails.	Yes. can be both defined and assigned to a category.	Yes. can be both defined and assigned to a category.

Table 9. Term properties that can be added or changed, by import method

Term property	CSV file	XML file	XMI file
Name	Yes, if being added for a new term only. Names of existing terms cannot be changed.	Yes	Yes
Long descriptions	Yes	Yes	Yes
Short descriptions	Yes	Yes	Yes
Abbreviations	Yes	Yes	Yes
Usages	Yes	Yes	Yes
Examples	Yes	Yes	Yes
Status	Yes	Yes	Yes
Related terms	No	Yes	Yes
Attribute IsModifier	Yes	Yes	Yes
Attribute Type	Yes	Yes	Yes
Synonyms	No	Yes	Yes
Containing (parent) category	Yes, if being added for a new term only. Parent categories of existing terms or categories cannot be changed.	Yes	Yes
Custom attribute	No	Yes	Yes
Custom attribute value	Yes, if the custom attribute already exists in the target metadata repository. If the custom attribute does not exist, the import fails.	Yes	Yes

Table 9. Term properties that can be added or changed, by import method (continued)

Term property	CSV file	XML file	XMI file
Reference to steward	Yes, if the user or user group already exists in the target metadata repository. If the user or user group does not exist, the import fails.	Yes, if the user or user group already exists in the target metadata repository. If the user or user group does not exist, the steward relationship is not created but other content is imported successfully.	Yes, if the user or user group already exists in the target metadata repository. If the user or user group does not exist, the steward relationship is not created but other content is imported successfully.
Reference to assigned assets (such as columns, jobs, tables)	No	Yes, if the asset already exists in the target metadata repository. If the asset does not exist, the relationship is not created but other content is imported successfully.	Yes, if the asset already exists in the target metadata repository. If the asset does not exist, the relationship is not created but other content is imported successfully.
References to assigned external assets (such as business process models or Web services)	No	Yes	Yes
Labels	Yes, can be assigned to a term if the label already exists in the target metadata repository. If the label does not exist, the import fails.	Yes. can be both defined and assigned to a term.	Yes. can be both defined and assigned to a term.

Related reference

“Version compatibility for import and export files” on page 53

Importing glossary content that has been exported from the current version of IBM InfoSphere Business Glossary is supported with only certain versions of IBM InfoSphere Business Glossary. The supported versions depend on the format of the file.

Import and export scenarios

The import and export capabilities of IBM InfoSphere Business Glossary can be useful in a variety of situations. The file format you choose will depend on the scenario.

Add or modify any type of glossary content

You can modify any term or category property, and you can do so with any program that can make changes to text files, by using the XML file format. You can also use an XML file to transfer information from some other system to InfoSphere Business Glossary. For example:

Modify glossary content with a text editor or XML editor

Export the business glossary, or parts of it, to an XML file and use a text editor or XML editor to modify glossary content, then import the changes. You can take advantage of search and replace and other advanced features of the editing program to make many changes quickly.

Initially populate the glossary with content from an external system

If your enterprise has content in a proprietary database, a programmer can write a program that extracts content from the proprietary database and writes it to an XML file that conforms to the InfoSphere Business Glossary schema.

Add or modify some types of glossary content from a spreadsheet

Use the CSV file format if you need a file format that is easy to view and work with, but do not need to modify all types of properties. The CSV file can be displayed by a spreadsheet program. For example:

Initially populate the glossary

Use the sample CSV file provided as a template and enter terms and categories in a spreadsheet. Import the file into InfoSphere Business Glossary to populate the glossary with terms and categories. You can now add more properties to the terms and categories by using the InfoSphere Business Glossary graphical user interface.

Modify glossary content

If you export existing glossary content into a CSV file, you can open the file in a spreadsheet program and view terms, categories, and their properties in spreadsheet rows and columns. You can edit this file to make changes and import it back into InfoSphere Business Glossary.

Note: Some properties cannot be modified with a CSV file. See “Import and export file formats” on page 53 for a list of the properties that you can change by using a CSV file.

Transfer a glossary from one InfoSphere Business Glossary environment to another

Use the glossary archive file format to save the glossary and transfer it among different computer environments. For example:

Make changes to your business glossary in a test environment before releasing to production

You have one instance of IBM InfoSphere Information Server for production and a second instance for testing. You want to change critical data in the business glossary and test those changes before you deploy them in the production environment. You can export your business glossary metadata from the production server and import it to a test server. Once you have made all changes to the metadata on the test server, export the changes to a glossary archive file and then import that file to the production glossary.

Move or upgrade systems

If you move your InfoSphere Information Server to a different physical server, or upgrade the operating system on the existing server, you can use the glossary archive export and import process to move your business glossary metadata to the new instance of the glossary. The import and export process is supported across different operating systems and different database types and versions.

You can also use the glossary archive format to transfer glossary content from one computer environment to another.

Using CSV files

To modify glossary content outside of the business glossary itself, glossary administrators can import from and export to a CSV (comma-separated values) file.

You can import glossary content from a CSV file that has been generated from another software application such as a spreadsheet program. Or, you can import

from a CSV file that you originally exported from InfoSphere Business Glossary and then edited to contain the glossary content that you want to import.

CSV file content

With the CSV file format, you can define categories, terms, links to stewards, and the values of custom attributes of categories and terms. You cannot define custom attribute definitions or relationships. You can change the values of most, but not all, term and category properties. See “Import and export file formats” on page 53 for a list of the properties that you can change by using a CSV file.

The CSV file that you import must be in formatted in the same way as shown in the CSV sample file. You can download the sample file from the import wizard.

You should be aware of the following points before you use the CSV import and export capability:

- If you import terms and categories that already exist in the glossary, the imported terms and categories replace the existing ones.
- If you import the values of custom attributes, the definitions of those custom attributes must already exist in the target metadata repository.
- You cannot assign relationships other than those among categories, subcategories, and terms. For example, you cannot specify synonyms or assign assets to terms.
- Names of categories and terms can contain any character, but cannot begin or end with a leading blank space. Names can consist of several words separated by spaces. Names can be up to 255 characters.
- The character encoding format (UTF-8 or a particular locale) of the imported file is not changed by the import process.
- If the file was originally created by exporting glossary content to a CSV file, then the IBM InfoSphere Information Server that hosts the business glossary into which the CSV file is imported must be set to the same locale that was in effect for the instance of InfoSphere Information Server from which the CSV file was originally created.

Considerations when exporting to a CSV file

You should be aware of the following points before you export to a CSV file.

- A parent category that contains subcategories can be exported only if all of its subcategories are exported.
- If you are importing from the IBM InfoSphere Business Glossary import wizard:
 - You can choose between UTF-8 and locale encoding (UTF-8 is the default). Use UTF-8 encoding unless you plan to open the resulting CSV file with an application that does not support UTF-8, such as Microsoft Excel. If you plan to open the file with an application that does not support UTF-8, select **Automatic coding - according to server locale** for the export format. If you choose this option, make sure that the client computer that is running the application that you use to open the exported CSV file is set to the same locale setting as that of the computer that is hosting InfoSphere Information Server. If the locale settings do not match, the file could appear to be corrupted when you open it.
 - You can select the **Glossary** check box to export the entire glossary.

Related reference

“Import and export scenarios” on page 56

The import and export capabilities of IBM InfoSphere Business Glossary can be useful in a variety of situations. The file format you choose will depend on the scenario.

Using XML files

Use an XML file to modify glossary content outside of the running InfoSphere Business Glossary.

To modify glossary content outside of the running InfoSphere Business Glossary, you can export the glossary to an XML (Extensible Markup Language) file, edit it, and then import the file. To modify the file, edit it with any text editor or XML editor.

XML file content

You can define all aspects of glossary content – terms, categories and their properties, custom attributes and their values, notes, stewardship, synonyms, and all types of relationships that are available in InfoSphere Business Glossary– in the XML file. Relationships can include those among categories, subcategories, and terms, assignment of assets to terms, custom typed assignments and labels.

The required structure and syntax of this file is defined by the InfoSphere Business Glossary XML schema. You can download the XML schema and a sample XML file from the import wizard.

Assigned assets themselves cannot be imported from the XML file, but if an asset already exists in the metadata repository, you can include term assignments to that asset in the XML file. See “Import and export file formats” on page 53 for a list of the properties that you can change by using an XML file.

When you select the categories that you want to export, the selected categories, their subcategories, and the terms included in any of the categories or subcategories are exported to the file.

Considerations when importing from an XML file

You should be aware of the following points before you import an XML file:

- When you import from an XML file, you must specify a merge method to resolve conflicts between the existing and the imported glossary assets.

In addition to adhering to the merge options that you select, relationships are established during the import process according to the following rules:

- If an assigned asset exists in the metadata repository, the assignment relationship between the asset and the term or category is established.
- Assigned external assets by definition do not exist in the metadata repository, so no relationship is established.
- If a user or user group that is assigned as a steward exists in the metadata repository, the steward relationship is established.
- If a user, user group, or an assigned asset does not exist in the metadata repository, then the relationship between a term or category and the asset or the steward is not established.

- Synonym relationships are established only after conflicts between the existing and the imported categories and terms are resolved by the merge method that you select.
- If assigned assets or stewards do not exist in the target metadata repository, the imported references to them are discarded. Therefore, before you import a file that contains assignments to assets or stewards:
 - Make sure that the assets exist in the metadata repository. Import them into the repository or create them in some other way.
 - Create users and user groups that do not exist and define them as stewards.

Related reference

“Import and export scenarios” on page 56

The import and export capabilities of IBM InfoSphere Business Glossary can be useful in a variety of situations. The file format you choose will depend on the scenario.

Schema concepts:

You should understand the way that glossary content is defined in the XML schema.

The XML schema for the business glossary defines categories and terms in one of two ways: with a repository identifier or *RID*, or with a glossary identity.

A repository identifier (RID) is a string that is generated by the metadata repository that uniquely identifies a category or term. When you export glossary content to an XML file, the file includes a RID for each category and term in the glossary.

A glossary identity consists of the name and full context, or path, from the top-level category, of a term or category. The context of each category and term is defined in the XML file.

When you import an XML file into an existing business glossary, a process of reconciliation occurs between what is defined in the file being imported and what is in the existing business glossary.

Reconciliation

Reconciliation refers to the process of determining the content differences between a file being imported and an existing business glossary. In trying to merge the new content with the existing content, the import utility first searches for a RID in the existing glossary that matches the RID in the imported file. If it does not find a matching RID, it then searches for a matching identity.

Reconciliation is used for terms, categories, and relationships. For example, consider this snippet from an XML file:

```
<category name="Category1" rid="reww">
<referencedTerms>
<termRef identity="Category2::Term2" rid="asdf"/>
</referencedTerms>
</category>
```

In this case, the reconcile process is used for two things: to look for the category Category1 in the existing glossary and to look for the referenced term Term2, with a parent category Category2, in the existing glossary.

Merging

The reconciliation process determines if there are content differences between the file being imported and the existing glossary. After reconciliation, the glossary content in the file and the glossary content in the existing glossary are combined, or merged. Merging refers to the process of selecting which assets and which asset attributes (or properties) should be used in the updated glossary if there are differences between what is defined in the file and what is defined in the existing glossary, and then actually combining them. In the example introduced earlier, if the reconcile process does not find the category Category1 in the existing glossary, then Category1 is added to the existing glossary during the import process.

Merge options

You can choose from among several merge options when you import a file. The merge options determine how conflicts between information in the import file and the existing glossary are resolved, for any terms and categories that exist in both places at the time of the import.

Relationships

Within the business glossary, you can define certain relationships among terms and categories. One term can be a "related term" to another term, or a term can be a "referenced term" or a "contained term" with respect to a category. In addition, the assignment of a steward to a term or category constitutes a relationship, and terms that are synonyms of one another also have a relationship.

If the file that is being imported contains an RID or identifier that is not found in the existing glossary, then the relationship is dropped. That is, even if such a relationship existed in the current glossary, after the import occurs, the relationship will no longer exist.

Using the example introduced earlier, if the reconcile process does not find the referenced term Term2, with a parent category Category2, in the existing glossary, then the referenced term relationship between Category1 and Term2 is dropped.

Related concepts

“Merge options”

Merge options give you control over how to manage conflicts between the imported and the existing business glossary assets when you import glossary content from an XML or glossary archive file.

“Synonym relationships after import” on page 63

Synonym relationships are reconciled in a specific way, depending upon what is in the imported file and what already exists in the business glossary.

Related reference

“XML schema and sample file” on page 64

You can download and study the XML schema and sample XML file to understand how business glossary content is represented in an XML file.

Merge options:

Merge options give you control over how to manage conflicts between the imported and the existing business glossary assets when you import glossary content from an XML or glossary archive file.

The merge option that you select specifies the method used by IBM InfoSphere Business Glossary to resolve conflicts between the imported and the existing values.

The merge option that you select is applied to the entire import process. In general, if a term or category that is defined in the file being imported does not exist in the repository, it is added to the existing glossary during the import process, regardless of which merge option you choose. Attributes include term and category properties, custom attributes, and labels.

Choose from the following merge options:

Ignore the imported asset and keep the existing asset

The import does not change the values of the existing assets.

Overwrite the existing asset with the imported asset

The import uses the values of the imported assets.

Merge the asset and ignore imported attributes that cannot be merged

For attributes that can have only one value, if the existing value is:

- null, the imported value overwrites the existing value
- not null, the import leaves the existing value unchanged

For all other attributes, the import combines the existing and imported values.

Merge the asset and overwrite existing attributes that cannot be merged

For attributes that can have only one value, if the imported value is:

- null, the import leaves the existing value unchanged
- not null, the imported value overwrites the existing value

For all other attributes, the import combines the existing and imported values.

Example

This example shows how terms with two types of attributes are imported by using each of the merge options. The short description attribute has only one value whereas there are several values for contained terms of the category.

The following table displays the attributes in an existing business glossary and in the import file.

Table 10. Existing and imported values of an attribute

Attribute	Existing value	Imported value
Short description Can have only one value.	"The unique identifier of the Customer Life Cycle Status Scheme involved in the relationship"	"The unique identifier of the Customer Life Cycle Status Type"
Contained terms of a category Can have more than one value.	Term 1, Term 2, Term 3	Term 2, Term 3, Term 4.

The following table displays the results from each merge method.

Table 11. Results from each merge method

If you chose this merge method	The short description is	The contained terms are
Ignore the imported asset and keep the existing asset	“The unique identifier of the Customer Life Cycle Status Scheme involved in the relationship”	Term 1, Term 2, Term 3
Overwrite the existing asset with the imported asset	“The unique identifier of the Customer Life Cycle Status Type”	Term 2, Term 3, Term 4
Merge the asset and ignore imported attributes that cannot be merged	“The unique identifier of the Customer Life Cycle Status Scheme involved in the relationship”	Term 1, Term 2, Term 3, Term 4
Merge the asset and overwrite existing attributes that cannot be merged	“The unique identifier of the Customer Life Cycle Status Type”	Term 1, Term 2, Term 3, Term 4

Related concepts

“Schema concepts” on page 60

You should understand the way that glossary content is defined in the XML schema.

“Synonym relationships after import”

Synonym relationships are reconciled in a specific way, depending upon what is in the imported file and what already exists in the business glossary.

Related reference

“XML schema and sample file” on page 64

You can download and study the XML schema and sample XML file to understand how business glossary content is represented in an XML file.

Synonym relationships after import:

Synonym relationships are reconciled in a specific way, depending upon what is in the imported file and what already exists in the business glossary.

Synonym relationships are created only after conflicts between the existing and the imported categories and terms are resolved by the merge method that you selected. The rules for creating synonym relationships are the same for all of the merge methods.

In the following table, each letter represents a term. Terms that are synonyms to each other are in parentheses.

Table 12. Merge results of synonyms

Synonyms in file to be imported	Existing synonyms	Synonyms after import
(A B) C	A B C	(A B) C
no terms with synonyms	(A B) C	(A B) C
(A B)	(A B C)	(A B C)
(A B) C D	(A B C) (D E)	(A B C) (D E)
(A B)	(B C) D	(A B C) D
(B C) D E	(A B) (C D)	(A B C D) E

Table 12. Merge results of synonyms (continued)

Synonyms in file to be imported	Existing synonyms	Synonyms after import
A (B C) E	(A B) (C D) (E F)	(A B C D) (E F)
(A B C D)	(A B) (C D)	(A B C D)

Related concepts

“Schema concepts” on page 60

You should understand the way that glossary content is defined in the XML schema.

“Merge options” on page 61

Merge options give you control over how to manage conflicts between the imported and the existing business glossary assets when you import glossary content from an XML or glossary archive file.

Related reference

“XML schema and sample file”

You can download and study the XML schema and sample XML file to understand how business glossary content is represented in an XML file.

“Mapping files” on page 66

If you are importing a glossary archive file, you can change glossary content with an accompanying mapping file.

XML schema and sample file:

You can download and study the XML schema and sample XML file to understand how business glossary content is represented in an XML file.

Introduction

The IBM InfoSphere Business Glossary XML schema defines the relationship of different kinds of glossary content to one another. Any XML file that is imported into the glossary must conform to the schema, and when you export to an XML file, the resulting file conforms to the schema. From the Import XML pane, you can download the XML schema file and a sample XML file. The sample file conforms to the schema. The file format supports all aspects of the glossary; for example, categories, terms, synonyms, notes, custom attributes, stewards and assigned assets.

Understanding the sample file

Download the sample XML file from the **Download a sample XML file** link in the Import XML pane. You can use the sample XML file to import the following categories, terms, and custom attributes into the glossary:

- Attributes
 - Owner
 - Legacy Name
- Categories
 - Category1
 - Category2
- Terms
 - Term1

- Term2

Attributes

Attribute Owner applies to categories. Attribute Legacy Name applies to terms. Attribute Legacy Name can have any value that is a string. Attribute Owner can have these string values: HR, FINANCE, or BUS DEVELOPMENT.

Categories

In the sample, Category1 contains Term1 and refers to Term2. Category1 has value FINANCE that is assigned as the value for attribute 'Owner'. Category2 contains Term2 and refers to Term1. Category2 has value HR that is assigned as the value for attribute Owner.

Terms

Term1 has Category1 as its parent category. Term2 has Category2 as its parent category. Term1 and Term2 are synonyms.

Related concepts

“Schema concepts” on page 60

You should understand the way that glossary content is defined in the XML schema.

“Merge options” on page 61

Merge options give you control over how to manage conflicts between the imported and the existing business glossary assets when you import glossary content from an XML or glossary archive file.

“Synonym relationships after import” on page 63

Synonym relationships are reconciled in a specific way, depending upon what is in the imported file and what already exists in the business glossary.

Using glossary archive (XMI) files

Use XML Metadata Interchange (XMI) files to transfer all or part of the business glossary from one IBM InfoSphere Information Server environment to another or to save a backup copy of the glossary.

You can export all or part of the contents of a glossary to an archive file that is in XML Metadata Interchange (XMI) format. You can then import the archive file into a metadata repository on a different instance of InfoSphere Information Server.

Glossary archive file content

You can define all aspects of glossary content – terms, categories and their properties, custom attributes and their values, notes, stewardship, synonyms, and all types of relationships that are available in InfoSphere Business Glossary– in the glossary archive file. Relationships can include those among categories, subcategories, and terms, assignment of assets to terms, custom typed assignments and labels. You cannot edit or modify the archive file itself, but you can change term or category properties with an accompanying mapping file. You can also select a merge method to resolve conflicts between the existing and the imported glossary assets.

With a glossary archive, all relationships are preserved. When you select the categories that you want to export, the selected categories, their subcategories, and the terms included in any of the categories or subcategories are exported to the

file. Assigned assets themselves are not exported or imported. However, if an asset already exists in the metadata repository, you can use the mapping file to assign a term or category to that asset. See “Import and export file formats” on page 53 for a list of the properties that you can change by using a glossary archive file with a mapping file.

Considerations when importing from a glossary archive file

You should be aware of the following points before you import a glossary archive file:

- If you need to change the values of assets in the archive file, you must use a mapping file to make those changes.
- When you import from an XMI file, you must specify a merge method to resolve conflicts between the existing and the imported glossary assets.

In addition to adhering to the merge options that you select, relationships are established during the import process according to the following rules:

- If an assigned asset exists in the metadata repository, the assignment relationship between the asset and the term or category is established.
- Assigned external assets by definition do not exist in the metadata repository, so no relationship is established.
- If a user or user group that is assigned as a steward exists in the metadata repository, the steward relationship is established.
- If a user, user group, or an assigned asset does not exist in the metadata repository, then the relationship between a term or category and the asset or the steward is not established.
- Synonym relationships are established only after conflicts between the existing and the imported categories and terms are resolved by the merge method that you select.

Related reference

“Import and export scenarios” on page 56

The import and export capabilities of IBM InfoSphere Business Glossary can be useful in a variety of situations. The file format you choose will depend on the scenario.

Mapping files:

If you are importing a glossary archive file, you can change glossary content with an accompanying mapping file.

Purpose

When you move assets from one business glossary to another, the exported attributes might not be suitable in the target glossary. For example, in the exported archive file, an asset that is assigned to a term is a database name. Before the archive file is imported, that asset must be reassigned to a database that exists in the target environment. Any attribute that refers to the exported database name can be mapped to the target database name.

About the mapping file

You import the mapping file from the import wizard at the same time that you import the glossary archive file. Be aware of the following points about the mapping file:

- Changes in the mapping file are case-sensitive. Enter the changes into the mapping file in the same case (uppercase or lowercase) in which they are entered in the target glossary.
- If assigned assets or stewards do not exist in the target metadata repository, the imported references to them are discarded. Therefore, before you use a mapping file that contains changed assignments to assets or stewards:
 - Make sure that the assets exist in the metadata repository.
 - Create users and user groups that do not exist and define them as stewards.

Sample mapping file

The mapping file is in an Extensible Markup Language (XML) format. The following XML code makes the following changes in an exported archive file:

Table 13. Changes in an exported archive file

Property	Original value in exported archive file	Changed value in imported business glossary
Assigned asset (database server)	server_a	server_b
Related asset that is a project name (for example, name of an IBM InfoSphere DataStage project)	Year_End	Northwest_Year_End
Status of a term	CANDIDATE	ACCEPTED
Short description of a term or category	Indicates whether the customer participates in a frequent flyer program.	Indicates whether the customer is a member of an airline hospitality club.

```
<?xml version="1.0" encoding="UTF-8" ?>
<!-- ===== -->
<!-- Business Glossary Mapping File -->
<!-- ===== -->

<Mapping xsi:schemaLocation="MappingFile.xsd"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">

<!-- ===== -->
<!-- CHANGE THE STATUS OF A TERM FROM CANDIDATE TO ACCEPTED -->
<!-- ===== -->

<!-- <TermStatusMappings>
  <TermStatusMapping>
    <CurrentStatus literal="CANDIDATE" />
    <!-- can use a '*' as a wildcard -->
    <NewStatus literal="ACCEPTED" />
  </TermStatusMapping>
</TermStatusMappings>

<!-- ===== -->
<!-- CHANGE AN ASSET (DATABASE SERVER) FROM server_a TO server_b -->
<!-- ===== -->

<ObjectMappings>
  <ObjectMapping>
    <Attribute packageNsUri="http://3.0/ASCLModel.ecore" classname="HostSystem"
      attrname="name"/>
    <!-- only string attributes -->
    <CurrentValue val="server_a" />
    <NewValue val="server_b" />
  </ObjectMapping>
</ObjectMappings>
```

```

    </ObjectMapping >

<!-- ===== -->
<!-- CHANGE AN ASSET (PROJECT) FROM Year_End TO Northwest_Year_End -->
<!-- ===== -->

    <ObjectMapping>
      <Attribute packageNsUri="http://1.1/DataStageX.ecore" classname="DSProject"
        attrname="Name" />
      <!-- only string attributes -->
      <CurrentValue val="Year_End" />
      <NewValue val="Northwest_Year_End" />
    </ObjectMapping>

<!-- ===== -->
<!-- CHANGES A SHORT DESCRIPTION -->
<!-- ===== -->

    <ObjectMapping>
      <Attribute packageNsUri="http://3.0/ASCLModel.ecore" classname="BusinessTerm"
        attrname="shortDescription"/>
      <!-- only string attributes -->
      <CurrentValue val="Indicates whether the customer participates in a frequent
        flyer program." />
      <NewValue val="Indicates whether the customer is a member of an airline
        hospitality club." />
    </ObjectMapping>
  </ObjectMappings>
</Mapping>

```

Related concepts

“Merge options” on page 61

Merge options give you control over how to manage conflicts between the imported and the existing business glossary assets when you import glossary content from an XML or glossary archive file.

“Synonym relationships after import” on page 63

Synonym relationships are reconciled in a specific way, depending upon what is in the imported file and what already exists in the business glossary.

Merge options:

Merge options give you control over how to manage conflicts between the imported and the existing business glossary assets when you import glossary content from an XML or glossary archive file.

The merge option that you select specifies the method used by IBM InfoSphere Business Glossary to resolve conflicts between the imported and the existing values.

The merge option that you select is applied to the entire import process. In general, if a term or category that is defined in the file being imported does not exist in the repository, it is added to the existing glossary during the import process, regardless of which merge option you choose. Attributes include term and category properties, custom attributes, and labels.

Choose from the following merge options:

Ignore the imported asset and keep the existing asset

The import does not change the values of the existing assets.

Overwrite the existing asset with the imported asset

The import uses the values of the imported assets.

Merge the asset and ignore imported attributes that cannot be merged

For attributes that can have only one value, if the existing value is:

- null, the imported value overwrites the existing value
- not null, the import leaves the existing value unchanged

For all other attributes, the import combines the existing and imported values.

Merge the asset and overwrite existing attributes that cannot be merged

For attributes that can have only one value, if the imported value is:

- null, the import leaves the existing value unchanged
- not null, the imported value overwrites the existing value

For all other attributes, the import combines the existing and imported values.

Example

This example shows how terms with two types of attributes are imported by using each of the merge options. The short description attribute has only one value whereas there are several values for contained terms of the category.

The following table displays the attributes in an existing business glossary and in the import file.

Table 14. Existing and imported values of an attribute

Attribute	Existing value	Imported value
Short description Can have only one value.	“The unique identifier of the Customer Life Cycle Status Scheme involved in the relationship”	“The unique identifier of the Customer Life Cycle Status Type”
Contained terms of a category Can have more than one value.	Term 1, Term 2, Term 3	Term 2, Term 3, Term 4.

The following table displays the results from each merge method.

Table 15. Results from each merge method

If you chose this merge method	The short description is	The contained terms are
Ignore the imported asset and keep the existing asset	“The unique identifier of the Customer Life Cycle Status Scheme involved in the relationship”	Term 1, Term 2, Term 3
Overwrite the existing asset with the imported asset	“The unique identifier of the Customer Life Cycle Status Type”	Term 2, Term 3, Term 4
Merge the asset and ignore imported attributes that cannot be merged	“The unique identifier of the Customer Life Cycle Status Scheme involved in the relationship”	Term 1, Term 2, Term 3, Term 4

Table 15. Results from each merge method (continued)

If you chose this merge method	The short description is	The contained terms are
Merge the asset and overwrite existing attributes that cannot be merged	“The unique identifier of the Customer Life Cycle Status Type”	Term 1, Term 2, Term 3, Term 4

Related concepts

“Schema concepts” on page 60

You should understand the way that glossary content is defined in the XML schema.

“Synonym relationships after import” on page 63

Synonym relationships are reconciled in a specific way, depending upon what is in the imported file and what already exists in the business glossary.

Related reference

“XML schema and sample file” on page 64

You can download and study the XML schema and sample XML file to understand how business glossary content is represented in an XML file.

Synonym relationships after import:

Synonym relationships are reconciled in a specific way, depending upon what is in the imported file and what already exists in the business glossary.

Synonym relationships are created only after conflicts between the existing and the imported categories and terms are resolved by the merge method that you selected. The rules for creating synonym relationships are the same for all of the merge methods.

In the following table, each letter represents a term. Terms that are synonyms to each other are in parentheses.

Table 16. Merge results of synonyms

Synonyms in file to be imported	Existing synonyms	Synonyms after import
(A B) C	A B C	(A B) C
no terms with synonyms	(A B) C	(A B) C
(A B)	(A B C)	(A B C)
(A B) C D	(A B C) (D E)	(A B C) (D E)
(A B)	(B C) D	(A B C) D
(B C) D E	(A B) (C D)	(A B C D) E
A (B C) E	(A B) (C D) (E F)	(A B C D) (E F)
(A B C D)	(A B) (C D)	(A B C D)

Related concepts

“Schema concepts” on page 60

You should understand the way that glossary content is defined in the XML schema.

“Merge options” on page 61

Merge options give you control over how to manage conflicts between the imported and the existing business glossary assets when you import glossary content from an XML or glossary archive file.

Related reference

“XML schema and sample file” on page 64

You can download and study the XML schema and sample XML file to understand how business glossary content is represented in an XML file.

“Mapping files” on page 66

If you are importing a glossary archive file, you can change glossary content with an accompanying mapping file.

Exporting files

Business Glossary Administrators can export glossary content from the IBM InfoSphere Business Glossary browser.

Before you begin

You must have the Business Glossary Administrator role.

Make sure that during the export process no one else is making changes to the portions of the business glossary that you are exporting to prevent changes from being lost.

If the export or import fails, no business glossary content is changed.

About this task

Note: You can also import or export glossary content from a command line with the istool command line interface.

Procedure

1. Navigate to the Administration tab.
2. Click **Export**.
3. Follow the prompts to complete the export process.

Related concepts

“Import and export methods” on page 52

Glossary administrators can use several methods to import and export glossary content to enable rapid development of a glossary or to transfer a glossary among different IBM InfoSphere Information Server installations.

Importing files

Business Glossary Administrators can import glossary content from the IBM InfoSphere Business Glossary browser.

Before you begin

You must have the Business Glossary Administrator role.

Make sure that during the import process no one else is making changes to the portions of the business glossary that you are importing to prevent changes from being lost.

If the export or import fails, no business glossary content is changed.

About this task

If the workflow feature is enabled, then imported content becomes draft content in the development glossary.

Note: You can also import glossary content from a command line with the istool command line interface.

Procedure

1. Navigate to the Administration tab.
2. Click **Import**.
3. Follow the prompts to complete the import process.

Related concepts

“Import and export methods” on page 52

Glossary administrators can use several methods to import and export glossary content to enable rapid development of a glossary or to transfer a glossary among different IBM InfoSphere Information Server installations.

Chapter 7. Authoring glossary content

Users with the appropriate security roles can create and modify glossary terms and categories.

Users who have the security role of Business Glossary Administrator or Business Glossary Author can create terms and categories and modify existing terms and categories. For users who are Business Glossary Authors, the terms and categories that the user creates or modifies must be in a category to which the user has been given category permissions.

Business Glossary Administrators have access to all categories.

You author glossary content in two ways, depending upon whether the workflow feature is enabled:

- If the workflow feature is enabled, you work in the Development Glossary.
- If the workflow feature is not enabled, you work in the Glossary.

Within these two glossaries, the steps to create and modify terms and categories are the same.

Related concepts

“Categories” on page 10

A category is like a folder or directory that organizes your glossary content.

“Terms” on page 9

A term is a word or phrase that describes a characteristic of the enterprise. Terms are the fundamental building block of the business glossary.

Related tasks

Chapter 5, “Logging in to IBM InfoSphere Business Glossary,” on page 45

You open IBM InfoSphere Business Glossary for administering, authoring, and viewing the business glossary with a web browser.

Creating new terms

Authorized users can create new terms.

About this task

You must be a Business Glossary Administrator or a Business Glossary Author. If you are a Business Glossary Author you must have permissions to the parent category for the term.

Procedure

1. If workflow is enabled, click the Development Glossary tab. If workflow is not enabled, click the Glossary tab.
2. Click **Create New Term**.
3. Enter information in the required fields and other fields that you want to include.
4. Click **Save** and choose the next step from the menu.

Results

A term is created with basic information. If workflow is enabled, the term is in draft mode in the Development Glossary. If workflow is not enabled, the term is in the glossary, and is available to all users who have the appropriate category permissions.

What to do next

Edit the term to add information about it and extend its meaning.

Related concepts

“Terms” on page 9

A term is a word or phrase that describes a characteristic of the enterprise. Terms are the fundamental building block of the business glossary.

Related tasks

“Including hypertext links” on page 75

You can include hypertext links in the details about a term or category.

Creating new categories

Authorized users can create new categories.

About this task

You must be a Business Glossary Administrator or a Business Glossary Author. If you are a Business Glossary Author you must have permissions to the parent category of the category that you intend to create.

Procedure

1. If workflow is enabled, click the Development Glossary tab. If workflow is not enabled, click the Glossary tab.
2. Click **Create New Category**.
3. Enter information in the required fields and other fields that you want to include.
4. Click **Save** and choose the next step from the menu.

Results

A category is created with basic information. If workflow is enabled, the category is in draft mode in the Development Glossary. If workflow is not enabled, the category is in the glossary, and is available to all users who have the appropriate category permissions.

What to do next

Edit the category to add information about it and extend its meaning.

Related concepts

“Categories” on page 10

A category is like a folder or directory that organizes your glossary content.

Related tasks

“Including hypertext links”

You can include hypertext links in the details about a term or category.

Editing terms and categories

Authorized users can edit existing terms and categories.

About this task

You must be a Business Glossary Administrator or a Business Glossary Author. If you are a Business Glossary Author you must have permissions to the parent category for the term or subcategory that you want to create.

Procedure

1. If workflow is enabled, click the **Development Glossary** tab. If workflow is not enabled, click the **Glossary** tab.
2. Navigate to the details page of the term or category you want to edit. You can find the term or category by browsing or by searching. You can also use the **Quick Term Finder** to find terms.
3. Click **Edit**. You are now in edit mode and can change any property of the term or category.
4. Change the properties and save the changes.

Results

If workflow is enabled, the edited term or category is now in draft mode in the Development Glossary. If workflow is not enabled, the term is in the glossary, and can be viewed by all users who have the appropriate category permissions.

What to do next

If workflow is enabled, you can send the changed term or category to the Publisher for approval.

Related concepts

“Categories” on page 10

A category is like a folder or directory that organizes your glossary content.

“Terms” on page 9

A term is a word or phrase that describes a characteristic of the enterprise. Terms are the fundamental building block of the business glossary.

“Term and category properties” on page 11

You specify properties for each term and category in the business glossary to provide glossary terms with meaning and context.

Related tasks

“Including hypertext links”

You can include hypertext links in the details about a term or category.

Including hypertext links

You can include hypertext links in the details about a term or category.

Before you begin

You must be a Business Glossary Administrator or Author user.

About this task

You can add hypertext links to any text entry field that defines a term or category. For example, you can add links to a description, custom attribute value, or notes about a term or category.

The link text can be the same as the link destination or you can choose different text. You can also create a link to a file or directory location or an e-mail address.

Note: As a security precaution, some Web browsers restrict direct access to files from the internet. Because the IBM InfoSphere Business Glossary is accessed through your Web browser, this restriction might apply and prevent access to files.

Procedure

1. To add a link that is the same as its destination text, enter the URL. For example, you could enter `http://www.example.com`. The link is displayed as `http://www.example.com` in the InfoSphere Business Glossary browser or IBM InfoSphere Business Glossary Anywhere.
2. To add a hypertext link for which the displayed link text is different than the destination text, and that can be a link to a file name, an e-mail address or a URL, use the following syntax:

```
[destination | linktext]
```

where

destination

is the destination that you are linking to: either a Web address, a file or directory location, or an e-mail address.

linktext

is the text you that you want to display to glossary users that will link to the destination specified by *destination*.

Only the *linktext* will be displayed in the InfoSphere Business Glossary browser or InfoSphere Business Glossary Anywhere.

Note: The hypertext link will not function as a live link in the truncated version of a long or short description. Users must expand the description to see a working link.

Example

To have the browser display the phrase "company home page" as a link to `http://www.example.com`, enter the following text:

```
[http://www.example.com | company home page]
```

To have the browser display "Joe Smith" as a hyperlink that, when selected, opens an e-mail program with the e-mail address "joe@example.com" entered as the recipient, enter the following text:

```
[joe@example.com | Joe Smith]
```

To have the browser display the word "File1" as a link to a file with that name that resides on a server called "server1" enter the following text:

[file://server1/file1.txt | File 1]

Chapter 8. Viewing glossary content

You can view information in the business glossary in a variety of ways.

Once you are logged in to InfoSphere Business Glossary, you can use several techniques to find information about terms and categories.

The fastest way to display information about a term that you know the name of is to use the Quick Term Finder that appears in the upper right of the InfoSphere Business Glossary screen. To find a term, start typing it in the Quick Term Finder data entry field.

You can also use the following methods:

Related tasks

Chapter 5, “Logging in to IBM InfoSphere Business Glossary,” on page 45

You open IBM InfoSphere Business Glossary for administering, authoring, and viewing the business glossary with a web browser.

Searching for glossary content

You can search for glossary content from the glossary home page. Narrow your search results with search options.

About this task

You can search for glossary content by using the **Search Business Glossary** field on the glossary home page. You can refine your search by using search options. If workflow is enabled and you have a workflow role, you can search in either the published glossary or in the development glossary.

Procedure

1. Type zero or more characters in the search field. If you leave the field empty, the search results will consist of all terms in the glossary. If you enter a string of one or more characters, the search results will consist of all terms that contain the string that you typed.
2. Click **Search**.
3. Optional: To refine your search, click **Options**. You can specify which types of assets you want to include in your search, and the properties you want to include. You can also limit the search to assets that have specific labels, if labels were defined in your glossary, that have specific stewards, or were modified within a certain period of time.
 - a. Select the assets that you want to search for and properties that you want to search within by selecting them from the pull-down menus. When you select an asset or property, it appears in the list above the appropriate pull-down menu. To remove an item from the list, click on the item in the list.
 - b. Optional: Narrow your search results further by selecting labels, stewards, and modification period.
 - c. Optional: Click **Save** to save your search options for a future session. If you saved search options in a previous IBM InfoSphere Business Glossary

session, you can revert to the previously saved options by clicking **Restore**. You can revert to the default search options by clicking **Reset**.

Browsing the glossary

You can find terms, categories, and other assets by browsing.

About this task

When you browse, you display a list or a hierarchical tree of glossary or metadata repository content. You can narrow the type of content you view at one time by choosing to browse a particular type of asset. You can also browse by label or by steward.

Procedure

On the home page of the glossary, click the type of list you want to display from the list of items displayed under the heading **Browse**. If you choose **All Assets**, you can continue to refine what you are looking for by selecting from particular kinds of assets.

Example

To display a list of all terms in the glossary, click **Terms**. To find information about a particular term in the resulting list, click the name of the term. Clicking the term displays the details page of the term. From the details page, you can click the name of any asset related to the term to display the details page of this related asset. For example, you can click the parent category for the term and find out more information about the parent category.

Filtering a list

Use filtering to narrow the results of a list of glossary assets that you displayed by browsing.

About this task

By using filters, you can further refine the results of a list of assets that you obtained by browsing the glossary.

Procedure

1. Display a list by browsing the glossary for terms, categories, or other assets.
2. Click the filter icon (). A list of basic filters is displayed.
3. Optional: Select **Show all filters** to show all possible filters.
4. Choose the filters you want to apply by selecting from the drop-down menus or by filling in the fields.
5. Click **Apply**.

Results

A narrowed list of assets is displayed, based on the filters that you applied to the original list.

Browsing hierarchical trees

You can browse hierarchical tree views of glossary content. The tree view shows you the structural relationships between items in the tree.

About this task

You can browse tree views of categories, logical data model assets, physical data model assets, and implemented data resources.

Procedure

1. Navigate to the published glossary.
2. Under the **Browse** heading, click one of the following items, depending on what type of assets you want to view a tree of:
 - For categories, click **Category Tree**.
 - For logical data model assets, physical data model assets, and implemented data resources, click **All Assets**. Then, click the **Tree View** icon in the Logical Data Models, Physical Data Models, or Implemented Data Resources row, corresponding to the type of assets you wish to view.

Viewing business lineage

You can display business lineage reports that display the flow of information between assets.

Before you begin

For business lineage of an asset to be displayed in an IBM InfoSphere Business Glossary interface (such as the glossary browser), the following conditions must be met:

- IBM InfoSphere Metadata Workbench must be installed as part of the same instance of IBM InfoSphere Information Server that hosts InfoSphere Business Glossary.
- You must have Adobe Flash Player installed on your local system. The version used must be no earlier than Adobe Flash Player 10.0.22.
- The asset must be configured, in InfoSphere Metadata Workbench, to be available in a business lineage display.

About this task

A business lineage report is a read-only report that displays the flow of information between assets. For example, a business lineage report for a BI report might show the flow of data from one database table to another database table. From the second database table, the data flows into a BI report collection table and then to a BI report. The display shows the context of the database tables and the BI report collection table.

Procedure

1. Browse or search for any of the following types of assets: extended data sources (application, file, stored procedure definition), BI reports and report models, data files, and schemas.
2. From the details page for the asset, click **Business Lineage**.

Results

A new window opens that displays the business lineage for the asset.

Related information

 [Running business lineage reports in InfoSphere Metadata Workbench](#)

Saving results to a file

You can save a list obtained by searching or browsing the glossary to a file.

About this task

When IBM InfoSphere Business Glossary displays a list of items, you can save the list to comma-separated values (CSV) file. Examples of types of lists are lists of terms, categories, labels, stewards, or any type of asset.

Procedure

1. Display a list by browsing or searching the glossary.
2. Select **List Options**.
3. Under **Save List To File** select **CSV**.
4. Follow the prompts displayed by your web browser to save or open the file.

Chapter 9. Accessing business glossary content from Eclipse applications

IBM InfoSphere Business Glossary includes an Eclipse plug-in component to access glossary content from within any Eclipse-based application.

You can view glossary content from within any Eclipse application by using the InfoSphere Business Glossary Client for Eclipse Core feature. The Glossary Explorer view provides a navigation tree of the terms and categories in the glossary. You can perform text searches for terms and categories and view more in-depth information about them in the Properties view.

The InfoSphere Business Glossary Client for Eclipse UML Profile feature gives you the ability to see what terms have been applied to existing models but without editing capability. If, in addition to the UML Profile feature, you also install InfoSphere Business Glossary Client for Eclipse UML Integration, you can integrate glossary terms into model elements. You can assign the terms to existing model elements, create new model elements with terms assigned to them, or use a term name as the name of a model element.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Data Architect, you can assign terms to physical data model elements and logical data model elements. These assignments can be exported into the metadata repository for use by other products in the InfoSphere Information Server suite.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Warehouse, you can associate terms with data flow elements in the SQL Warehousing (SQW) Tool. These associations can be imported into the metadata repository for use by other products in the InfoSphere Information Server suite.

By using a supported IBM Rational Software Architect product and InfoSphere Business Glossary Client for Eclipse, you can view glossary content while you develop software models of business processes. Having glossary terms readily available to you enables you to choose the correct term to assign with elements in your model.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Blueprint Director, you can assign terms to elements in blueprints.

Accessing business glossary content from Eclipse applications

IBM InfoSphere Business Glossary includes an Eclipse plug-in component to access glossary content from within any Eclipse-based application.

You can view glossary content from within any Eclipse application by using the InfoSphere Business Glossary Client for Eclipse Core feature. The Glossary Explorer view provides a navigation tree of the terms and categories in the glossary. You can perform text searches for terms and categories and view more in-depth information about them in the Properties view.

The InfoSphere Business Glossary Client for Eclipse UML Profile feature gives you the ability to see what terms have been applied to existing models but without

editing capability. If, in addition to the UML Profile feature, you also install InfoSphere Business Glossary Client for Eclipse UML Integration, you can integrate glossary terms into model elements. You can assign the terms to existing model elements, create new model elements with terms assigned to them, or use a term name as the name of a model element.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Data Architect, you can assign terms to physical data model elements and logical data model elements. These assignments can be exported into the metadata repository for use by other products in the InfoSphere Information Server suite.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Warehouse, you can associate terms with data flow elements in the SQL Warehousing (SQW) Tool. These associations can be imported into the metadata repository for use by other products in the InfoSphere Information Server suite.

By using a supported IBM Rational Software Architect product and InfoSphere Business Glossary Client for Eclipse, you can view glossary content while you develop software models of business processes. Having glossary terms readily available to you enables you to choose the correct term to assign with elements in your model.

By using InfoSphere Business Glossary Client for Eclipse with IBM InfoSphere Blueprint Director, you can assign terms to elements in blueprints.

Chapter 10. Developing and extending applications

You can create custom applications or extend existing applications to take advantage of IBM InfoSphere Business Glossary.

You can create custom software applications that use the features of InfoSphere Business Glossary with the InfoSphere Business Glossary REST (Representational State Transfer) API (Application Programming Interface). You can also use the REST API to extend the functionality of existing applications.

You can extend Eclipse-based applications to integrate with InfoSphere Business Glossary by using the InfoSphere Business Glossary Java API.

Integrating with Eclipse-based applications

You can add IBM InfoSphere Business Glossary functionality to existing Eclipse-based applications by using IBM InfoSphere Business Glossary Client for Eclipse Java API.

The Java API documentation extends Eclipse-based applications to include many of the functions provided by InfoSphere Business Glossary Client for Eclipse. The Java API documentation supports these InfoSphere Business Glossary Client for Eclipse features:

IBM InfoSphere Business Glossary Core

This feature can be added to any Eclipse application.

The Core API enables you to browse the local glossary and to search its content.

IBM InfoSphere Business Glossary UML Profile

This feature can be added to any Eclipse application that includes Unified Modeling Language (UML) support.

The UML Profile API enables you to apply the Business Glossary profile and its related stereotype to your model. You can also add, remove, and read term assignments of your model elements.

IBM InfoSphere Business Glossary Data Model Integration

This feature can be added to IBM InfoSphere Data Architect.

The Data Model API enables you to add, remove, and read term assignments of your data model elements.

IBM InfoSphere Business Glossary Physical Model Integration

This feature can be added to any Eclipse application that supports physical data model infrastructure.

The Physical Model API enables you to add, remove, and read term assignments of your physical data model elements.

The Java API and its supporting documentation are provided with IBM InfoSphere Business Glossary Client for Eclipse.

Accessing product documentation

Documentation is provided in a variety of locations and formats, including in help that is opened directly from the product client interfaces, in a suite-wide information center, and in PDF file books.

The information center is installed as a common service with IBM InfoSphere Information Server. The information center contains help for most of the product interfaces, as well as complete documentation for all the product modules in the suite. You can open the information center from the installed product or from a Web browser.

Accessing the information center

You can use the following methods to open the installed information center.

- Click the **Help** link in the upper right of the client interface.

Note: From IBM InfoSphere FastTrack and IBM InfoSphere Information Server Manager, the main Help item opens a local help system. Choose **Help > Open Info Center** to open the full suite information center.

- Press the F1 key. The F1 key typically opens the topic that describes the current context of the client interface.

Note: The F1 key does not work in Web clients.

- Use a Web browser to access the installed information center even when you are not logged in to the product. Enter the following address in a Web browser: `http://host_name:port_number/infocenter/topic/com.ibm.swg.im.iis.productization.iisinfsv.home.doc/ic-homepage.html`. The `host_name` is the name of the services tier computer where the information center is installed, and `port_number` is the port number for InfoSphere Information Server. The default port number is 9080. For example, on a Microsoft® Windows® Server computer named `iisdocs2`, the Web address is in the following format: `http://iisdocs2:9080/infocenter/topic/com.ibm.swg.im.iis.productization.iisinfsv.nav.doc/dochome/iisinfsv_home.html`.

A subset of the information center is also available on the IBM Web site and periodically refreshed at `http://publib.boulder.ibm.com/infocenter/iisinfsv/v8r7/index.jsp`.

Obtaining PDF and hardcopy documentation

- A subset of the PDF file books are available through the InfoSphere Information Server software installer and the distribution media. The other PDF file books are available online and can be accessed from this support document: `https://www.ibm.com/support/docview.wss?uid=swg27008803&wv=1`.
- You can also order IBM publications in hardcopy format online or through your local IBM representative. To order publications online, go to the IBM Publications Center at `http://www.ibm.com/e-business/linkweb/publications/servlet/pbi.wss`.

Providing feedback about the documentation

You can send your comments about documentation in the following ways:

- Online reader comment form: www.ibm.com/software/data/rcf/
- E-mail: comments@us.ibm.com

Contacting IBM

You can contact IBM for customer support, software services, product information, and general information. You also can provide feedback to IBM about products and documentation.

The following table lists resources for customer support, software services, training, and product and solutions information.

Table 17. IBM resources

Resource	Description and location
IBM Support Portal	You can customize support information by choosing the products and the topics that interest you at www.ibm.com/support/entry/portal/Software/Information_Management/InfoSphere_Information_Server
Software services	You can find information about software, IT, and business consulting services, on the solutions site at www.ibm.com/businesssolutions/
My IBM	You can manage links to IBM Web sites and information that meet your specific technical support needs by creating an account on the My IBM site at www.ibm.com/account/
Training and certification	You can learn about technical training and education services designed for individuals, companies, and public organizations to acquire, maintain, and optimize their IT skills at http://www.ibm.com/software/sw-training/
IBM representatives	You can contact an IBM representative to learn about solutions at www.ibm.com/connect/ibm/us/en/

Providing feedback

The following table describes how to provide feedback to IBM about products and product documentation.

Table 18. Providing feedback to IBM

Type of feedback	Action
Product feedback	You can provide general product feedback through the Consumability Survey at www.ibm.com/software/data/info/consumability-survey

Table 18. Providing feedback to IBM (continued)

Type of feedback	Action
Documentation feedback	<p>To comment on the information center, click the Feedback link on the top right side of any topic in the information center. You can also send comments about PDF file books, the information center, or any other documentation in the following ways:</p> <ul style="list-style-type: none"><li data-bbox="967 443 1459 499">• Online reader comment form: www.ibm.com/software/data/rcf/<li data-bbox="967 506 1459 539">• E-mail: comments@us.ibm.com

Product accessibility

You can get information about the accessibility status of IBM products.

The IBM InfoSphere Information Server product modules and user interfaces are not fully accessible. The installation program installs the following product modules and components:

- IBM InfoSphere Business Glossary
- IBM InfoSphere Business Glossary Anywhere
- IBM InfoSphere DataStage
- IBM InfoSphere FastTrack
- IBM InfoSphere Information Analyzer
- IBM InfoSphere Information Services Director
- IBM InfoSphere Metadata Workbench
- IBM InfoSphere QualityStage

For information about the accessibility status of IBM products, see the IBM product accessibility information at http://www.ibm.com/able/product_accessibility/index.html.

Accessible documentation

Accessible documentation for InfoSphere Information Server products is provided in an information center. The information center presents the documentation in XHTML 1.0 format, which is viewable in most Web browsers. XHTML allows you to set display preferences in your browser. It also allows you to use screen readers and other assistive technologies to access the documentation.

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