Implementation Plan: Populating the Business Glossary

BACKGROUND
The University’s Data Trustees, based on input from the Administrative Data Stewards, decided that one of the first projects in the Data Governance Initiative is the creation of a Business Glossary. This glossary will contain definitions and additional information about data within our administrative systems, as well as business terms in use at the University.

PURPOSE OF THE BUSINESS GLOSSARY
There are many purposes of the Business Glossary, including:

- Developing cross-University agreement on common terms and definitions as part of the glossary development process
- Guide to NYU “jargon” for new employees
- Reference for current employees using reports from, or doing ad hoc queries against, the UDW+
- Explanation of University processes, either directly or via links to other web-based information

HOW WILL WE POPULATE THE BUSINESS GLOSSARY?
The development of the contents of the Business Glossary will require time and effort from the various divisions and offices of the University, and will be an on-going project as new terms and definitions are added and existing ones are refined. The focus of the effort is two-fold: to document exactly what a data field means, and to come to University-wide agreement on the meaning of terms.

Teams of individuals will come together in Working Groups to develop agreed upon definitions of terms. In order to be respectful of everyone’s time, and recognizing that no Data Steward has the job function “data stewardship” as their sole responsibility, we will bring together in these Working Groups only the people needed for discussions about each particular term to be defined.

To manage this process, we are going to introduce a schema known as PCAD. The acronym stands for:

- Propose – The office/individual responsible for creating the first draft of the definition, which will be the starting point for the Working Group.
- Consult – The offices/individuals who participate in Working Group sessions to refine and agree upon a definition.
- Agree – Those offices/individuals recused from the Working Group meetings used to formulate the definition, with the understanding that the office will agree with (i.e., support) the Working Group’s decision – and not seek to revise it after agreement has been reached by the Working Group participants.
- Document – An individual to: help draft the definitions; record the decisions which have been agreed upon; and provide final edits before releasing the term in the Business Glossary.

As new terms come up for review we will ask each Data Steward to indicate, for each term, their role in the process to populate the Business Glossary. Those offices which indicate that they are to Propose or to be Consulted for any given term will be asked to attend the Working Group meeting where that term will be defined. Limiting the invitations to each meeting to the relevant...
participants avoids asking individuals to attend meetings where the discussion is not pertinent to them – both saving them time and leaving a smaller working group.

**ROLES IN THE PROCESS**
The roles involved in building the Business Glossary are among the roles identified in the University’s *Administrative Data Management Policy*. The projected roles are:

**Data Steward**
Each Data Steward will have multiple responsibilities in the building of the Business Glossary:
- Respond in a timely fashion to requests to indicate what their role will be in the evaluation of each term as new terms are targeted for review.
- For each term for which she or he is the “Proposer,” create the initial draft definition and enter it into the on-line Business Glossary. Attend those Working Group sessions where the terms she or he is responsible for are being discussed.
- Attend Working Group sessions for those terms for which she or he has a “Consult” role.

**Data Domain Trustee**
Each Data Domain Trustee will have these responsibilities in the building of the Business Glossary:
- If desired, review definitions prepared by the Data Steward, when the Steward is in the “Proposer” role, before they are brought to the Working Group.
- Act as first level of appeal, with other Data Domain Trustees, if the Data Stewards cannot come to consensus on a definition.
- Optionally use the Business Glossary system to approve the agreed upon definition, and “push it forward” for editorial review.

**Data Trustee**
Each Data Trustee will have the following responsibilities in the building of the Business Glossary:
- Act as second level of appeal, with other Data Trustees, in the unlikely event that both the Data Stewards and the Data Domain Trustees cannot come to consensus on a definition.
- Oversee progress of the project to build the Business Glossary by reviewing status reports presented at Data Trustee meetings.

**Chief Administrative Data Management Officer (CADMO)**
The CADMO will have the following responsibilities in the building of the Business Glossary:
- Schedule all Working Group sessions.
- Act as the Documenter for all Working Group sessions and all definitions.
- Work with individuals needing assistance in writing definitions.
- Prepare definitions as needed.
- Act as resource to Data Stewards in entering definitions into the Business Glossary.
- Along with the DSG, provide final editing of definitions and publish them to the Business Glossary (i.e., reveal them and make them searchable).
- Provide periodic status reports to the Data Trustees.
FAQ

Q: How will the list of terms to be defined be developed?
A: There will be multiple sources:

- As a new subject area is added to the UDW+, we will work on the fields included in the new release
- Conversion of existing definitions, where available
- Review existing UDW+ subject areas and include fields not previously defined
- Submissions from the Business Glossary website ("Can’t find a term? Request New Entry" option)
- Requests from Data Trustees, Data Domain Trustees, and Data Stewards

Q: What is the sequence for working with offices to include their terms in the Business Glossary?
A: We are developing the schedule now, and will try to proceed in as logical a manner as possible. Two areas were initially identified as they each touch on different aspects of the Business Glossary load process.

- Non-Area Specific Terms – by working on these definitions we expect to involve a large number of people in the Working Group who will learn more about the process and get a true feel for what is being accomplished. These terms will include such common words as “Student,” “Term,” “Net ID,” etc.
- University Development and Alumni Relations – since UDAR has a number of definitions already in place in the Advance system, it should be relatively easy to move those into the Business Glossary.

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