Oracle® Data Foundation Cloud Service

Data Catalog

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Oracle Data Foundation Cloud Service Data Catalog, Release 25D

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Contents

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About This Guide

This section provides supporting information for the Oracle Data Foundation Cloud Services for Banking (DFCS).

Audience

This document contains release information of Oracle Data Foundation Cloud Services for Banking (DFCS).

Documentation Accessibility

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Related Resources

- Data Foundation for Banking

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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Data Catalog Overview

The Data Platform is a suite of services, including Data Catalog and Data Integration services, designed to support data management for Oracle's Finance, Risk, and Compliance applications.

Data Platform services include the following:

- Data Catalog
- Data Controls
- Issues and Actions
- Data Maintenance
- Data Services Data Operations

2.1 Data Catalog

Data Catalog is the logical representation of the underlying Data Model, which is contextualized by the Metadata to enable a better understanding of the Data Model and the enterprise-wide data. For example, understanding the End of Period Book Balance in the context of Loans and Securities may require two definitions of the term in discovering. Further analysis of the Metadata helps discover the sources, current business uses of the element, validation checks, and any privacy aspects.

The Data Catalog comprises of elements called Business Terms supporting business needs of the Banking and Financial Services Industry across the Finance, Risk, and Regulatory Compliance Functions. Data Catalog includes sourced, calculated, and master elements. Elements that require conformation to the standards will have a list of expected values. A combination of Business Terms and Entities form the underlying Data Model. The search capability allows you to explore data by different dimensions.

The Data Catalog helps you understand the business relevance of an Element and the associated Data Definition, grain through Entities and Subject Areas. You can group the Data Catalog by Subject Area and this subset is narrowed down to a business use case (For example, Basel Credit Risk).

In a multi-domain Data Catalog environment, you need to select the required Financial Domain that filters the Subject Areas relevant to the selected Domain or Service, Entities under the Subject Area, and Elements mapped to the Entities.

The Data Catalog is the gateway to create, view, or manage the physical instance of the Data Model.

You can use out-of-the-box define Pipelines (table to table process, Connector) to load data into the Entity, and execute and manage the Process.

The fundamental objectives of the Data Catalog are as follows:

- To provide a unified logical view of the Enterprise Data Model.
- To enable data discovery using predefined Metadata that is modifiable by Users.
- To support end-to-end data lineage as it connects data sources and uses.

2.2 Catalog Key Capabilities

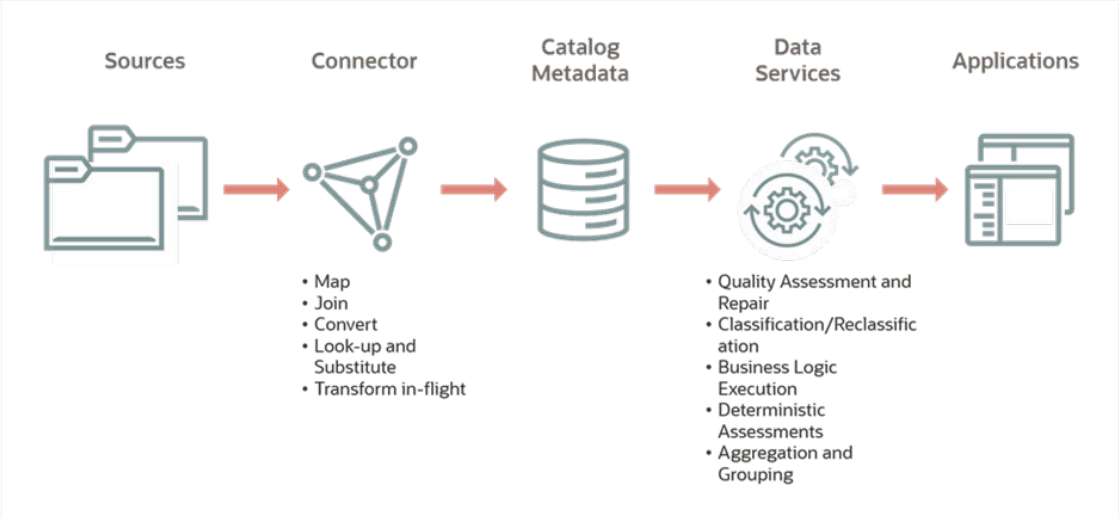
Data Catalog provides the Data Model for the Financial Services Industry. The key capabilities of the Data Catalog are as follows:

- **Catalog Browser**: Data Catalog consists of a Viewing Framework. The Data Catalog Browser API-based Interface allows you to view the Data Catalog Components. The Catalog Browser enables the Users to go through the Data Catalog Contents and view the Business Terms by Domain, Subject Areas, and Entity. The Catalog Browser also shows the Properties of Business Terms, Contextual Definition in a User-friendly language, List of Values, Data Sourcing Components, and Data Quality Rules.
- **In-built Data Modelling Capabilities**: Data Catalog contains all the required information to establish services underlying the Data Model, which is Entities, Attributes, and the relationship between Entities and Attributes. Similar to any Entity Relationship Modelling Tool used for this purpose, the Data Catalog can build, manage and hold Data Model for the deployment purpose.
- **Data Quality Checks Rule**: Data Catalog Contents include Data Quality Checks Rule so the system incoming data can be verified and validated.
- **Catalog Extension**: Data Catalog supports a Framework to extend the Data Catalog called the Data Catalog Extension or catalog Extension. The Catalog Extension allows user to extend the Seeded Catalog Contents to support a new or client-specific business use cases. You can add new Business Terms or customize the existing definitions when the Business Term is enforced by the external entities.
- **Comprehensive Coverage**: Data Catalog provides a collection of comprehensive Business Terms across the Business Lines and Use Cases.
- **Data Movement**: Data Catalog provides the mechanism of **Stage to Standardize to Process** to move the Data along to the Result for analytical consumption. The Catalog Services are accessed through API calls used by the Data Services Module to move data.

2.3 Catalog Architecture

Data Catalog is at the center of sources and uses of data. Along with providing comprehensive understanding of data through the available metadata about sources and uses, it is necessary to be able to enrich or modify as required. In this direction OFS Data Catalog is designed to support integration with Data Sources and downstream uses, which means predefined for known uses and extendable for the unknown. The Data Catalog by Subject Area can be further segregated as Sources, Results (calculated), and Master Data that are sourced and seeded, which helps to plan the sourcing and supplying of data based on the Enterprise needs. Considering the need to serve a conglomerate of users, the Data Catalog is embedded with a sound Governance Framework assuring the security and privacy.

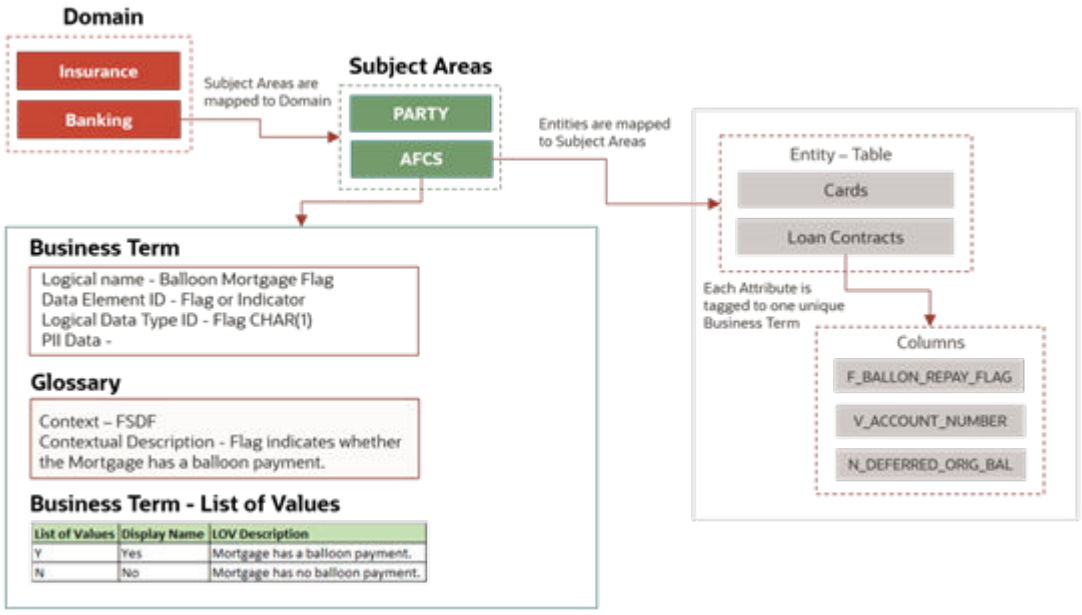
Figure 2-1 Data Catalog Architecture Diagram



2.4 Core Catalog Components

A well-defined structure is followed to seed and organize the Data Catalog Contents for efficient discovery and management. The structure starts with a Domain, which for example, in the OFSAA context can be either Banking or Insurance, and for this Domain, the Contents are created. Each Domain can have multiple Subject Areas, and a collection of Entities and Business Terms associated with those Subject Areas.

Figure 2-2 Data Catalog components



The Data Catalog consists of the following Components:

- Domain
- Subject Area
- Entity
- Business Term
- Glossary
- Data Quality Check Rules

2.4.1 Domain

A Domain represents the category of the Business in the Finance Industry.

The Data Catalog consists of the Data Catalog Framework and pre-seeded content associated with a specific Line of Business or Industry, referred to as a *Domain*.

In OFSAA, select the **Banking** domain.

Selecting the Domain Name limits the display of Catalog components to those relevant for that domain and enables you to deploy the corresponding Data Model selectively.

2.4.2 Subject Area

A Subject Area represents a high-level data organization, which belongs to a group of related areas within a specific functional area of a Finance Organization.

Entities are grouped together into distinct Subject Areas based on the business functions or processing supported for better identification and usage.

The relationship type between Domain and Subject Area is Many-to-Many.

The following are a few examples of Subject Areas in the Data Catalog:

- Data Foundation Cloud Service for Banking
- Party
- Product Processor
- Transaction
- Product

2.4.2.1 Relationship Between Subject Areas

Data Catalog has a provision to define the Parent-Child Relationship between the Subject Areas. Therefore, you can define the Parent-Child Relationship as follows if there is a business need:

- Domain to Subject Area Relationship

2.4.3 Entities

The Catalog has a comprehensive list of entities to support a very wide range of analytical business use cases across Banking domains. These entities are mapped to the subject area and the domain which helps in deploying the model, either completely or selectively, based on the services the user has subscribed.

Users can navigate through the logical layer comprising of entities using the Catalog Viewer. The physical layer comprising of table and column names are inconsequential to the user, and therefore, it is hidden from them.

2.4.3.1 Entity Type

Entities in the model are grouped into the following types based on data layers they are tied to:

- Download or Staging
- Result
- Dimension
- Preparation
- Integration

Preparation and Integration Entities or layers are internal to a product. A Preparation layer contains entities used for processing while an Integration layer contains placeholders for other engines or applications to publish their processed output.

2.4.3.1.1 Stage Entity

Stage Entities are a part of the Unified Data-Sourcing layer for data for a wide variety of analytical needs. The Staging layer faces the operational (OLTP) and Front Office Systems of a bank. It consists of entities to capture key business and operational data from these systems, which is then processed by one or more Analytical Engines.

Since these entities are designed to facilitate loading efficiency, they are denormalized. Typically, this data is extracted from source systems and placed in the object store and then loaded to Staging Entities using data services.

2.4.3.1.2 Result Entity

It is a Unified Reporting or a Consumption layer. Analytical results can be simple to complex, contain quantitative and qualitative measures of a bank's Risk, Compliance, Customer and Financial Performance. The Reporting layer is a Dimensional Data Model spanning these key analytical functions. It forms the foundation of OFSAA Business Intelligence Applications but can clearly be used as the result data store for any equivalent engines and processes provided by other vendors, or custom built solutions. By providing a Single Data Repository for reporting needs, this layer provides a foundation for departmental as well as Cross-Departmental and Cross-Functional Reporting. Additionally, the schema of the reporting area is specifically built for Financial Services Analytics. As an illustration, the reporting area has a **Run Dimension** that is shared across all BI/reporting use cases. Similarly, the aggregation of shared measures/ reporting into a common set of output structures (Account Summary) allows for Cross-Functional Reporting, which is increasingly the norm in Financial Institutions.

It is also the layer where all the input data sourced by the user through Staging Entities are persisted and available for reporting and consumption.

Along with the definition or structure of these entities, the catalog also provides mapping metadata to populate these entities from sourcing to PMF Data Pipeline.

Currently, this layer has entities to persist Journal, General Ledger Account, Transactions and Contract Data to cater to the needs of the DFCS solution.

> **Note**
>
> For any existing extractions defined on Journal, Journal Header, and General Ledger Account Data, re-select the grain, entity, and attributes and save. This will enable extraction from the Persistence layer.

> **Note**
>
> This is applicable only for the Banking domain. The PMF pipeline **Account Load Run Map Population** execution should have completed before executing the below step. This step is required for Common Account Summary and Transaction Summary data population.

Based on the domain, select **Add Domain** under **Administration**, domain specific Result Area Entities are populated.

The user must manually execute a **PMF Pipeline Result Area Entities Data Population** to populate data in the Result Area tables.

> **Note**
>
> This is specific to Banking domain. The following Target tables Accounting Entries, Accounting Entries Header, Currency Exchange Rates, General Ledger Data, Common Account Summary and Transaction Summary are used for data population in the result area.

The user must manually execute a **PMF Pipeline Data Service Result Area Data Population** to retrieve the data in the Result Area tables. The persistence of day and period-to-date movement information is performed through this pipeline.

> **Note**
>
> The **As of Date** parameter value passed while executing PMF Pipeline **Data Service Result Area Data Population** filters on **Effective Date** attribute in the source entity.

2.4.3.1.2.1 Execute Result Area Entities Run Pipeline

The steps to execute the Result Area Entities Run Pipeline are as follows:

Prerequisite:

The SCD pipeline execution should have completed before executing the below steps. For more details, see Slowly Changing Dimensions.

1. Execute the Run Pipeline after data is loaded in the Stage tables and processed.
2. Use the Run Execution Parameter **As of Date** to execute for each date, to get the data in the result tables. This parameter value is applied as a filter in the source entity on **As Of Date** Business term.
3. If you execute multiple times within a day, the data is loaded with different Run Execution Skey.

For example, if the execution is done thrice a day, the data is loaded thrice into the Target table.

> **Note**
>
> You should not re-run the already executed pipeline. If you re-run, the execution fails due to duplicate Run Execution Skey. You can resume the execution in case of pipeline failures after fixing the errors.

4. If the execution is repeated with the new Run Skey, the entire data available in the Stage table will be loaded to the Target table.

2.4.3.2 Properties

Entity consists of a set of Attributes. Each Attribute is mapped to a unique Business Term. Each Attribute derives its characteristics such as Data Type, Constraints, and so on from the Business Definitions.

2.4.3.3 Granularity

Data Catalog defines granularity of each of the Entity it holds.

V_GRAIN_ID	V_GRAIN_NAME
DATE	Date
ACCT	Customer Account
ACCT_TXN	Customer Account Transactions
ACCT_ENT	Accounting Entries
GL_DATA	General Ledger Data
EXCHANGE_RATE	Exchange Rates
PARTY_CONSENT	Party Consent

For example, as the Loan Contracts Entity contains information at the Account Level, the grains of Loan Entity are defined as ACCT.

2.4.4 Business Term

A Business Term is a Functional Keyword that represents a unique functional aspect of the Financial Artefacts (Entities and Attributes). There is a business meaning to each Financial Artefact, and therefore, a business name is created in the form of a Business Term. Then the Business Term is used to find and fit into a purpose of different contexts. Therefore, Business Terms are expressions of the Participants/Actors, their Activities, and requirements conveyed in common business.

The approach to arrive at the Logical View of the Physical Model has inverted in the Data Catalog. Contrary to the previous practices, first the Functional Keyword or Artefacts are identified, collated, and then expressed in common business language, and then the corresponding Physical Model is developed.

Multiple Business Terms are a part of each Subject Area. A Business Term is a singular term irrespective of multiple places it appears in and the Business Term will have a recognizable naming pattern.

Metadata is attached to the Business Terms.

The Content Structure allows you to define relationship between related Business Terms for better discovery and usage in the aspect of sourcing.

Table 2-1 Example of Relationship between Business Terms

Business Term	Related Business Term	Relationship Type
Current Write Off Amount	Write Off General Ledger Code	MEASURE_GL

To create or update a Business term, see Create Business Terms.

2.4.4.1 Business Term Properties

In the process of creating a Business Term, certain characteristics are also defined that serves as input when arriving to a Physical Model Structure. These characteristics include origin, classification, logical data type, PII term indicator, list of accepted values, and data quality check applicable for a Business Term.

The Business Term Properties are as follows:

- Term ID
- Logical name
- Origin
- Data Element ID
- Language
- Logical Data Type ID
- PII Flag
- LOV Code
- Display Name
- LOV Description

> **Note**
>
> The Business Terms for which PII Flag is set and for those Business Terms that are used in Entities, the underlying attributes of those Entities will be redacted by applying the appropriate redaction policies. A normal user cannot query or view the redacted data. Only users with exempt redaction policy role can view or query the data.

2.4.4.2 Business Term Glossary

For each Business Term, there is a corresponding Glossary. The Glossary explains the meaning and purpose of each Business Term, which is the context. The Glossary consists of the information such as description, usage, sample values, and usage examples of the Business Terms.

2.4.4.3 Business Term List of Values

Data Catalog defines and seeds the List of Values for all the Business Terms that are Flags. The List of Values help you with data sourcing and creating Data Quality Checks.

Table 2-2 Example of Business Term List of Values

List of Values	Display Name	List of Values Description
Y	Yes	Mortgage has a balloon payment
N	No	Mortgage has no balloon payment

2.4.4.4 Related Business Terms

Catalog has a provision to store the metadata to represent the relationship between two Business Terms along with the type of relationship.

Some information is later used for specific purpose. For example, In the case of `SHARED_DEFINITION` relationship type, Data Quality rules are automatically replicated for the related Business Term if there are rules existing for the Business Terms.

`MEASURE_GL` is another relationship type where the Business Term is a reconciliation measure and the related Business Term is corresponding to a GL account.

Table 2-3 Example of Related Business Term

Business Term	Related Business Term	Relationship Type
Account or Contract Number	Parent Account Number	SHARED_DEFINITION
End of Period Balance	General Ledger Account code	MEASURE_GL
Maturity Amount	Maturity Date	VALUE_AS_OF_DATE
End of Period Balance	End of Period Balance in Local Currency	CURRENCY_EQUIVALENT
Account Tenor	Tenor Unit	MULTIPLIER_UNIT

2.4.5 Derived Business Terms

Derived Terms are expressions or formulas used that generate values not directly available from Business Terms. Derived Terms provide users with access to pre-defined and custom data derivations. These derived terms represent calculated or logical attributes created using existing data elements, helping users understand how specific business metrics or transformations are generated.

The system provides both seeded data (predefined terms and expressions) and the ability for users to custom derive business terms tailored to specific needs.

This guide demonstrates the following.

- View existing derived terms, including both seeded and custom terms.
- Create new custom derived terms by defining expressions using business data.
- Review and manage derived terms to ensure consistency, accuracy, and relevance in your data-driven processes.

> **Note**
>
> – Derived Business Terms support only **Oracle SQL single-row functions**. For more details see, Single-Row Functions.
>
> – Aggregation and **XML/JSON** functions are **not supported**.

1. Open the application and navigate to the **Data Catalog** section in the left-hand menu.
2. Under **Data Catalog**, select **Derived Terms**. The **Derived Terms** page will appear, displaying all available derived terms
3. The **Derived Terms** list page displays key information about each derived term.

Column	Description
Name	The name of the derived term (e.g., *Account Age in Months*).
Element Type	Indicates the type of data (e.g., *Numerical Non-Monetary*, *Flag or Indicator*).
Description	Provides a short explanation of how the derived term is calculated.
View Button	Opens a detailed view of the selected derived term.

4. Use the **Search bar** to look up a term by name or description.
5. Filter results by **Seeded/Customized** or **Element Type**.
6. Use the **Sort By** drop down to arrange the list as needed.
7. Click **Create Derived Term** to define a new derived term (if you have the appropriate permissions).
8. On the **Derived Terms** list page, click the **View** button next to the term you wish to explore.
9. The **Derived Term Details** panel opens, showing two main tabs:
   - **Expression**: The **Expression** tab displays the logic or formula used to derive the term. **Example: Account Age in Months**
     Description: Refers to Account Age. The attribute is derived using the difference between the *Value Date* and *As Of Date* in months.

     ```
     TRUNC(MONTHS_BETWEEN([As Of Date],[Value Date]))
     ```
   - **References**: The **References** tab lists the specific **entities** (data domains or subject areas) where this derived term is applied, along with the corresponding expressions.

> **Note**
>
> In DFCS 25C release, datatype validation during Derived Business Term creation is not implemented. Ensure that the selected **Element Type** (datatype) matches the expected **output datatype** of the expression.
> **Examples:**
>
> – For expressions such as `EXTRACT(YEAR FROM [As Of date])`, select **Date and Timestamp** as the Element Type.
>
> – Select `Numerical – Monetary` or `Numerical Non-Monetary` as the Element Type.
>
> Selecting an incorrect Element Type (for example, choosing `Numerical (Non-Monetary)`for a date-based expression) may result in successful creation of an invalid Derived BT.
>
> Datatype validation will be implemented in a future DFCS release.

Creating a New Derived Term

1. Click **Create Derived Term** at the top-right corner of the Derived Terms page.

Table 2-4 Enter the following details

Field	Description
Derived Term Name	Name of the new derived term (e.g., Total Advance Payment Amount).
Element Type	Select the type of data (e.g., Monetary Amount, Text Description).
Description	A brief description of the derived term (e.g., "Testing Total Advance Payment Amount").
Business Terms	Select the relevant business terms associated with the derived term.
Expression	Enter the formula for the derived term (e.g., CONCAT or MINUS)).
Justification	Provide a justification for the term (e.g., "Justification of Total Advance Payment Amount").

> **Note**
>
> If the expression contains syntax errors (such as missing parentheses), the system will display a Validation Failed message.

2. Verify all the details, including the term name, expression, and justification.
3. Under **Entities**, confirm where the derived term will be applied (e.g., Overdraft Accounts, Loan Contracts, Cards).
4. Click **Create** to create the new derived term.
5. After successfully creating the derived term, you will see a Submission Successful message confirming the term is created.

6. Once the derived Business Term is created, it appears in the list of derived terms and can be added to a custom ADS connector mapping template for future connector configurations.

Edit Business Terms

The Edit option is available only for custom derived business terms.

From the term's details page, you can choose to edit its expression or delete the term if needed. For more information see, Application Data Services Connectors.

1. To edit a derived term, navigate to the **Derived Terms** section in your Data Foundation for Banking interface.
2. Use the filter to select the term type:
   - Click the filter dropdown and select either **Custom** or **Seeded** depending on the type of derived term you wish to edit.
   - You may also use the search bar to find the term by its name or description.
3. Browse or search for the desired derived term in the list.
   a. Click the **View** button next to the derived term you want to edit. For example: "Custom Derived Account Status Date AllTest".
   b. On the term details pane, you will see the current definition including:
      - Derived Term Name (read-only)
      - Element Type (e.g., Date and Timestamp)
      - Description
   c. You can update the **Description** or other editable fields depending on the permissions.
   d. Click **Continue** to proceed to the Review and Update window.
   e. Click **Update** to update the derived term.

2.4.6 Data Quality Checks

Data Catalog Contents include Data Quality Check Rules. These Rules are defined at the Business Term and Entity Level, and seeded as a part of the Data Catalog Content. For more information on user-configurable Data Quality Rules, see *Data Quality Framework*.

2.4.6.1 Types of Data Quality Checks

The following are the types of Data Quality Checks and their definitions:

Data Quality Check	Definition
Blank Value Check	Identifies if the base column is empty considering the blank space.
Column Reference/Specific Value Check	Compares the base column data with another column of the base table or compare with any attribute of compatible data type from a referenced dimension of a base entity.
Data Length Check	Checks for the length of the base column data by using a minimum and maximum value, and identifies if it falls outside the specified range.

Data Quality Check	Definition
Duplicate Check	Is used when a combination of the column is unique and identifies all duplicate data of a base table in terms of the columns selected for the duplicate check.
List of Value Check	It can be used to verify values where a dimension/ master table is not present. This check identifies if the base column data does not match with a value or specified code in a list of values.
NULL Value Check	Identifies if NULL is specified in the base column.
Referential Integrity Check	Identifies all the base column data that has not been referenced by the selected column of the referenced table. Here, the user specifies the reference table and columns.
Range Check	Identifies if the base column data falls outside a specified range of a Minimum and Maximum value. Value Needs to be between 0 and 100.
Uniqueness Check for Numeric Identifiers in Dimension	Check to identify duplicates in Numeric Identifier Attribute for a Dimension Entity. Check to identify changes in Numeric Identifier Attribute for a Dimension Entity for the same Business Key member. **Note** Threshold option is currently not supported for custom check.
Special Character Check	Identify business term contains only the allowed set of special characters. Currently, DFCS has preconfigured rules for the following Business Terms: • Legal Entity Code • Legal Entity Description • Legal Entity Name • Data Source Code • Data Source Description

Note

The check category for custom DQ check referencing to dimensions will be shown as **Custom Check** in the Data Quality Result reports.

2.4.6.2 Use and Execute the Source Data Quality Check Process

Use this Run Pipeline (Process) to generate and view the Data Quality report for any of the Data Quality run execution. The Data Quality Reporting Engine Pipeline uses the 'As of Date' and the 'Run Identifier' parameters to generate the Data Quality reports for run executions which are in 'Completed' status either for a passed or a failed run execution.

> **Note**
>
> Once the DQ Report has been generated for the failed DQ run pipeline, post the execution of this PMF, users must provide the Process Instance ID of the failed DQ run to the public API to view the DQ Groups that are breaching the threshold limit. For more information, see Data Operations Guide.

1. To access the **Source Data Quality Check Process Pipeline**, select the **Process Orchestration** from the home page.

   The **Process Modeller** page is displayed.

2. On the **Process Modeller** page, search and select the **Source Data Quality Check Process Pipeline**.

   The **Process Flow** page is displayed. This Process Flow is designed on the Drawing Canvas using the Transition, Activity, and Widgets Components available in the floating toolbar. `RUN DQ RULE` widgets representing Data Quality Groups are set up in parallel to each other. A Data Service widget called as **Data Quality Reporting Engine** is added at the end meant for reporting Data Quality Checks.

3. To view the details of any widget, double-click on the widget and the details related to its Activity, Transition, and Notification are displayed. On the drawing canvas, you can select and see the Definition, Data Fields, and Application Rule details.

4. To execute the **Run**, you can select the **Run Parameter Values** using the **Execution** button on the **Process Flow** page or on the **Process Modeller** page.

5. Go to the **Process Modeller** page to execute the **Run**.

6. Click the menu button corresponding to the **Source Data Quality Check Process** that needs to be executed.

7. Click **Execute Run**.

   The **Execution** page is displayed.

8. On the **Execution** page, to execute the **Run** with parameters, select **With Parameters** in the **Execution Type** list.

9. Select the required **As of Date** for which the Data Quality Checks need to be processed.

10. Click **Apply** to initiate the **Run Pipeline** execution.

> **Note**
>
> The execution of the Run Pipeline is triggered using the selected Extraction Date. See the Process Orchestration section for more details about the Process Orchestration framework.

To verify the Run Execution of the Source Data Quality Check Process, do the following:

a. To open the **Process Monitor** page, on the Process Modeller page, click the **Process Monitor** button or select **Process Flow Monitor** on the **Process Modeller** menu.

   The **Process Monitor** page is displayed, which lists all the Run Instances corresponding to the Source Data Quality Check Process.

b. On the **Process Monitor** page, search by the Process ID, or by the Process Name Source Data Quality Check Process, and select the Process Instance for the required Run Pipeline (Process) that was executed.

11. The **Process Flow** page is displayed with the Run Execution Status on each Node of the Source Data Quality Check Process.
12. To verify the Run Execution Logs, do the following:
    a. On the Process Monitor page, click the required Process Instance for which you need to verify the Execution Logs. The Process Flow page is displayed with the Run Execution Status on each Node.
    b. To see the Execution Status details of a Node, double-click on that Node. The Execution Status details page is displayed.
    c. Click **Execution Logs**.

       The Log Viewer page is displayed, which lists all the Logs related to the Process Instance. To see the details of a log entry, click the Show More Button. Click outside the Log Viewer page to close it.

2.5 Glossaries, Glossary Mappings, and ADS Connectors (DFCS Only)

Managing data efficiently is key to seamless integration, validation, and accessibility. Follow these steps to create a well-structured data catalog, map glossary terms, and integrate connectors for a smooth data management experience.

2.5.1 View Glossaries

The *Foundation Catalog for Banking* is a published data set within the Oracle Financial Services Analytical Applications (OFSAA). It serves as a data warehouse aiding financial institutions in managing risk, performance, and compliance.

1. Click on **Glossaries** under Data Catalog section.
   The catalog summary page has the below components:

Table 2-5 Catalog Summary

Column	Description
Catalog Status	**Catalog Status** indicates the current status of the catalog: • **Draft** – The catalog is still being modified by the user. • **Validated** – The catalog has been reviewed and validated but is not yet published. • **Published** – The catalog is finalized and available for use.

Table 2-5 (Cont.) Catalog Summary

Column	Description
Catalog Title	**Catalog Title** includes the following details: • **Catalog Name** – e.g., PBSM Catalog • **Published Version Number**- Refers to the unique identifier assigned to a specific version of a configuration, rule, or dataset that has been finalized and made available for use in production or downstream processes. • **Catalog Description** – A brief description (up to 250 characters)
Catalog Type	**Catalog Type** includes: • **Type of Catalog** – e.g., Foundation, Application, BIRD, Seeded • **Source/Results** – Indicates whether the catalog is a source or results catalog
Created by	**Created By** includes details of the user who created or last modified the catalog.
Purpose	Ingress / Egress- for data movement into and out of systems.
Source	Seeded – provided out-of-the-box by the system.
Line of Business	All – applicable across all business areas.
Count	**Count** displays the number of Business Terms followed by the number of Entities.
...	The **Menu Button** (also known as the meatball or burger button).

> **Note**
>
> At least two versions of the catalog must be in the **Published** state to access the **Audit History** option under the **...** menu.

2. Click the three-dot menu (**⋮**) on the catalog tile or detailed view.

Table 2-6 View Catalog

Field Name	Description
Name	A free form field where the user enters the catalog name. This is a **mandatory** field.
Source	A drop-down field where the user selects the catalog's source. This is a **mandatory** field.
Source Version	Specifies the version of the selected source. This is a **mandatory** field.
Published Date for the Source	Displays the source's published date. The maximum allowed date is the current date.
Purpose	A drop-down field where the user selects the catalog's purpose. This is a **mandatory** field.
Product Category	A drop-down field where the user selects the appropriate product category.

Table 2-6 (Cont.) View Catalog

Field Name	Description
Line of Business	A drop-down field where the user selects the relevant line of business.
Description	A free form field where the user enters a description for the catalog. This is a **mandatory** field.
How to use	An optional field where the user can provide details on how to use the catalog or its intended purpose.

2.5.2 Glossary Mapping

Glossary mapping in a data catalog refers to linking business terms from a **Application catalog** (such as an PBSM glossary) to equivalent or related terms in a **mapped catalog** of DFCS.
The **Glossary Mapping Summary** page, similar to the Catalog Summary and Connectors, provides an overview of glossary mappings.

The **Glossary Mapping Summary** page, similar to the Catalog Summary and Connectors, provides an overview of glossary mappings.

The Glossary Mapping function allows you to view and manage mappings between different data catalogs.

1. Navigate to the **Data Foundation for Banking** application, under **Data Catalog** section, click **Glossary Mapping**.

   The **Glossary Mapping** screen appears to view the list of Glossary Mapping.
2. The table describes the various options in the Glossary Mapping screen.

Table 2-7 Glossary Mapping Components

Option	Description
Search Bar	Enables keyword search across glossary mapping name, primary catalog, mapped catalog, and created by.
Filters	• **Primary Catalog**: Shows only items with the selected primary catalogs. e.g., Profitability and Balance Sheet Management v25.6.1). • **Target**: Filters items by target catalog. • **Created By**: Filters items by the user.
Glossary Mapping Template	• A downloadable Glossary Mapping Template (xlsx) button is located on the top-right. • This template can be used to prepare mappings for upload or review. **Note** Previous versions of DFCS did not support template uploads.

Table 2-7 (Cont.) Glossary Mapping Components

Option	Description
Published Version Number	The Glossary Mapping screen always displays the **latest version** associated with the mapping.
Last Updated	Shows the user/system and relative time of the last update (e.g., **5 days ago**).
Mapping Info	• **Seeded Mappings**: Number of mappings preloaded or auto-generated (e.g., 795 Seeded Mappings). • **Extended Mapping**: Indicates if there are any extended mappings (e.g., No Extended Mapping).
Sort By Menu	Located on the top-right of the mapping list, the **Sort By** dropdown lets you organize the glossary mappings based on different criteria. • Glossary Mapping Name A to Z: Sorts mappings alphabetically by name in ascending order. • Glossary Mapping Name Z to A: Sorts mappings alphabetically by name in descending order. • Primary Catalog A to Z: Sorts based on the name of the primary catalog in ascending order. • Primary Catalog Z to A: Sorts based on the name of the primary catalog in descending order. • Mapped Catalog A to Z: Sorts based on the name of the mapped catalog in ascending order. • Mapped Catalog Z to A: Sorts based on the name of the mapped catalog in descending order.

2.5.2.1 Viewing Glossary Mapping

The **View Glossary Mapping Details** screen provides a summary of the glossary mapping configuration. It provides the source and target mapping details. It also displays key metadata that identifies and describes the mapping between two catalogs—**Primary Catalog** and **Mapped Catalog**. This step is read-only and intended to give users an overview before proceeding to define or review term-level mappings.

1. Click on the **three dots** > **View**.

   The View Glossary Mapping Details screen is displayed.

2. The Viewing Glossary Mapping Details screen is the first step in the 5-step mapping workflow, setting the context for the detailed term mappings that follow.

3. The View Glossary Mapping Details are listed in the table.

Table 2-8 View Glossary Mapping Details

Fields	Description
Mapping Name	The unique title assigned to the mapping.
Description	A brief description of the purpose or scope.

Table 2-8 (Cont.) View Glossary Mapping Details

Fields	Description
Primary Catalog	The source glossary or taxonomy from which terms are being mapped.
Mapped Catalog	The target glossary to which terms will be linked.

- Direct Mapping
- Expression
- Extension
- Review

2.5.2.1.1 Direct Mapping

The **Direct Mapping** tab displays how the **Primary Catalog Business Terms** (e.g., PBSM) map to their corresponding equivalents in the **Mapped Catalog Business Terms** (e.g., FSDF).

> **Note**
>
> Currently LOV is not enabled for glossary mapping.

1. Navigate to **Direct Mapping** from the **View Glossary Mapping Details** screen.
2. The following fields are displayed.

Table 2-9 Direct Mapping Interface

Feature	Description
Search Bar	Use the search bar to locate specific **Primary Catalog Business Terms** (PBSM). • Example: Type **"Current Payment"** to view all related terms.
Mapped/Unmapped Filters	Filter between viewing only mapped or unmapped terms by selecting the corresponding check box. • **Show Mapped Business Terms** – Display only terms that already have mappings. • **Show Unmapped Business Terms** – Display only terms needing mapping.
Term Pairing Table	Side-by-side comparison of PBSM and FSDF terms with editable drop down.

2.5.2.1.2 Expression

The **Expression Mapping** tab allows users to view and manage expression-based mappings between business terms from the **Primary Catalog Business Terms (PBSM)** and the **Mapped Catalog Business Terms (FSDF)**.

1. Navigate to the **Expression Mapping** screen.
2. Use the search bar to filter terms by name from the Primary Catalog. This helps quickly locate a specific business term. The screen displays the Mapping Table. The main section displays a list of mappings in a table format:

- **Primary Catalog Business Terms (PBSM)**: Original terms from the primary data source.
- **Mapped Catalog Business Terms (FSDF)**: Target terms from the mapped data catalog.
- **Expression:** Shows a **View** button to inspect transformation logic.

3. On the Mapping Table, click **View** to display the **View Expression Details** pane.
4. On the **Expression Details** pane, the **Expression Name** and **Expression** logic is displayed. The View Expression Details pane displays detailed information about a selected expression used in business term mappings.

> **Note**
>
> Example:
>
> - **Expression Name**: Account Age In Months
> - **Expression Logic**: TRUNC(MONTHS_BETWEEN([As Of Date], [Value Date]))
>   This formula calculates the difference in months between two dates, rounded down to the nearest month.

2.5.2.1.3 Extension

The Extension tab shows mapping between **Primary Catalog (say, PBSM)** and **Mapped Catalog (FSDF)** for local extensions in Primary Catalog and Mapped Catalog.

2.5.3 Application Data Services Connectors

DFCS includes built-in connectors called **Application Data Services (ADS)** that help send data to the application database via **Connectors**. To use this feature, you need to set up a connection between the two cloud systems by entering the required details in the **Data Services Subscriptions UI**.

The **Application Connectors** interface displays connector details in a structured table format, providing insights into their status, source, target catalogs, and mappings.

You can initiate a connection using either of the following methods:

- From the LHS menu, click **Data Catalog → Application Connectors**.
- or, navigate to the DFCS interface → **Data Catalogs → Application Connectors**.
  1. Click on any **Connectors** to view the summary screen.

Table 2-10 Connectors Summary User Interface

Column	Description
Search	Use this to find connectors by name, status, source catalog, target catalog, or created by.

Table 2-10 (Cont.) Connectors Summary User Interface

Column	Description
Status	Indicates the current status of the connector: – **Draft** – The connector is still being edited. – **Validated** – The connector has been validated but not yet published. **Published** – The connector is finalized and available for use.
Connector Name	Displays the **name of the connector**, along with details of: – Last created by – Who created it Time since creation
Target Catalog & Entity	Specifies the **name of the target catalog and entity** associated with the connector.
Source Catalog	Displays the **name of the source catalog** linked to the connector.
Number of Mappings	Shows the number of mappings and allows users to **view comments for the Business Term**.
Create New Connector	Allows users to create custom connectors.
Connector Extension Template (.xlsx)	Download the template to update details and upload.
Version	Each ADS connector now displays its version number directly in the connectors list. The connector list automatically displays the **latest connector version** (e.g., 25.12.1). **Note** – Published connectors show the full ADS version (e.g., **v25.12.1**) – Custom or validated connectors show a version label such as **v1**, **v2**, **v3** and so on.

2. Click the **three-dot menu (⋮)** next to a connector.
3. Select one of the following options based on the publish status.
   - **View** – to review connector details and view is common for predefined and custom connectors.
   - **Edit** – to modify connector configurations. Only custom connectors can edit the details.
   - **Download** – to export connector details. The download option is enabled for predefined and custom connectors that are already published.
   - **Publish Connector** – to publish the custom connector. The publish connector option is available only if the connector status is **Validate**.

> **Note**
>
> Predefined (seeded) connectors **cannot be edited** directly, they can **only be extended**.

2.5.3.1 Viewing Application Data Services Connector Details

The **View Connector Details** feature provides a guided interface that allows users to view, configure, and manage connector settings. This feature is available for connectors that are in **Published** or **Validated** status. It provides a summary of the connector configuration, including source and target entities, catalogs, and a brief description of its function.

1. Select the **Connector Name** from list displayed else click the three dots → **View**.
2. The following table describes the view connector details.

Table 2-11 View Connector Details

Field	Description
Connector Name	Predefined field displaying the connector name (e.g., *Stage Payment Schedule*).
Description	Brief explanation of the connector's purpose (e.g., data flow and usage).
Target Catalog	Verify the catalog where the target entity is located (e.g., *Profitability and Balance Sheet Management*).
Target Entity Name	Verify the entity in the target system (e.g., *Stage Payment Schedule*).
Source Catalog	Choose the catalog where the source data originates (e.g., *Foundation Catalog for Banking*).
Source Entity Name	Select the raw data entity (e.g., Payment Schedule).
Expression	The expression filters the source data being pulled into the target entity.

2.5.3.1.1 Key Business Terms

This section is used to view the mapped business terms between the **Source** and **Target** entities.

Figure 2-3 Key Business Terms

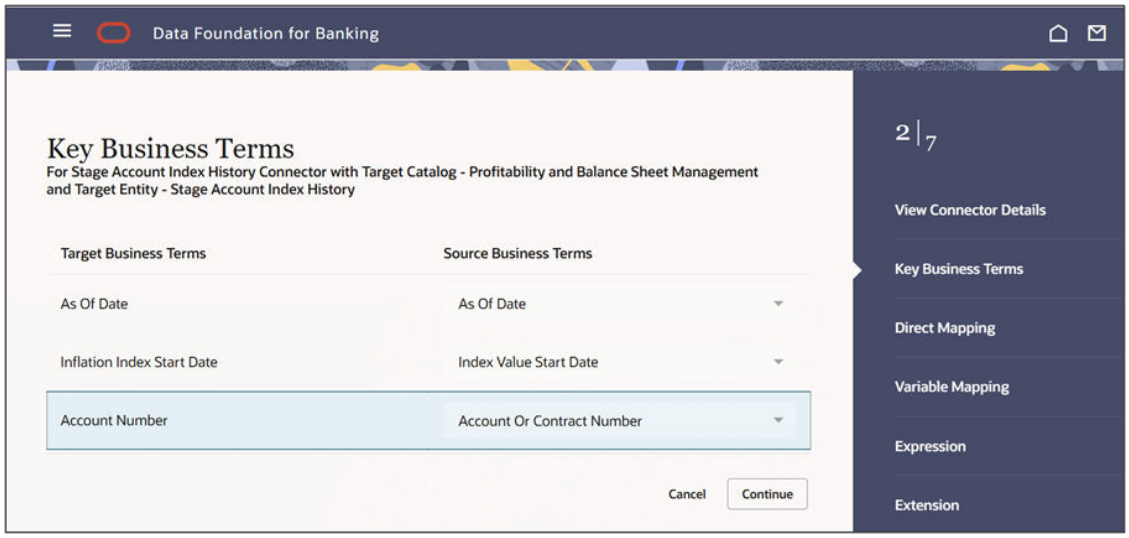


Table 2-12 Key Business Terms

Field	Description
Target Business Terms	Business terms associated with the target entity (e.g., *Stage Account Index History*). If empty, it means no terms are defined.
Source Business Terms	Business terms linked to the source entity. If empty, no terms have been assigned.

2.5.3.1.2 Direct Mapping

The **Direct Mapping** screen allows users to view the mapped business terms from the **Primary Catalog** (e.g., PBSM) to their corresponding equivalents in the **Mapped Catalog** (e.g., FSDF).

This section displays the **1:1 mapping** between business terms in the **source** and **target** entities. It helps users trace how each field from the source corresponds to the target in the connector setup.

1. Navigate to **Direct Mapping** tab and then view the following details.

Table 2-13 Direct Mapping

Field	Description
Target Business Term	The name of the business term in the **target entity** that will receive data.
Source Entity	The entity from which the data is fetched.
Source Business Term	The corresponding business term in the **source entity**.
LOV	**LOV (List of Values)** refers to a predefined set of valid values that users can select from when mapping data fields between **Target Business Terms** and **Source Business Terms** during the data mapping process.

2. Click **Download** to save the mapped entries.

2.5.3.1.2.1 LOV's

List of Values (LOV) is a feature within the **Direct Mapping** section that allows users to view and interpret predefined value mappings between **Target Business Terms** and **Source Business Terms** during the data mapping process.

1. Navigate to the **Direct Mapping** section (Step 3 of 7 in the Connectors mapping workflow).
2. Locate the row with the **Target Business Term** that supports LOV mapping.
3. If a LOV mapping is available, a green **View** button will appear under the **LOV Mapping** column.
4. Click the **View** button to open the LOV Mapping window.
   The LOV Mapping window displays the relationship between the values used in the **Target Business Term** and the corresponding values from the **Source Business Term** and LOV Mapping.

   The below example lists the values for Payment Type and Application Service Payment Type.

Table 2-14 LOV Mapping Table Columns

Column Name	Description
Payment Type Code	Code used in the Target Business Term.
Payment Type Name	Description of the Target Payment Type Code.
Application Service Payment Type Code	Code used in the Source Business Term.
Application Service Payment Type Name	Description of the Source Payment Type Code.

Table 2-15 Example LOV Mapping

Payment Type Code	Payment Type Name	Application Service Payment Type Code	Application Service Payment Type Name
INTONLY	Interest Only	INT	Interest Only
PRINONLY	Principal Only	PRIN	Principal Only
PRININT	Principal and Interest	PRIN_INT	Principal and Interest

This mapping ensures that the correct values are transformed between systems for accurate data integration and reporting.

2.5.3.1.3 Variable Mapping

The **Variable Mapping** section allows users to view the mapped input parameters or runtime variables to the corresponding **Target Business Terms**.

1. Navigate to **Variable Mapping** tab and view the following details.

Figure 2-4 Variable Mapping

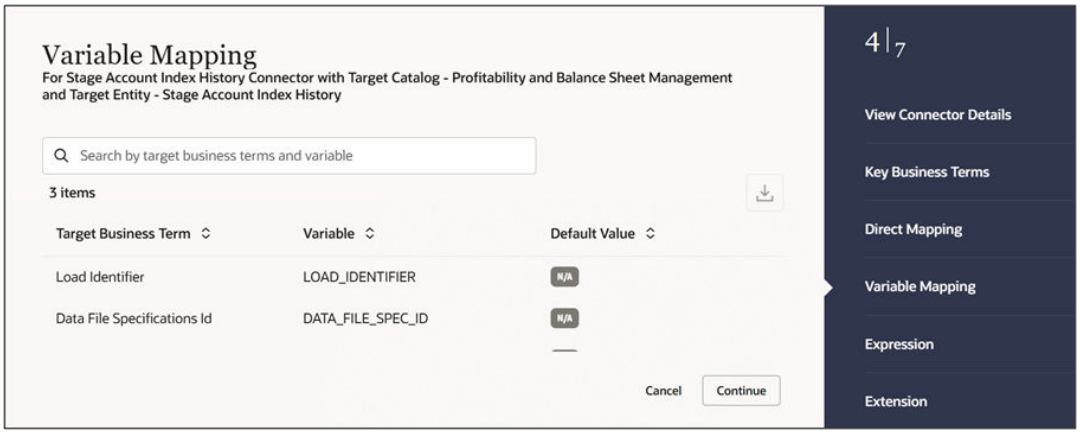


Table 2-16 Variable Mapping

Field	Description
Target Business Term	Business term in the target entity that will receive the runtime value.
Variable	Name of the variable to be mapped (e.g., INPUT_FILE_NAME, LOAD_IDENTIFIER).
Default Value	Optional field to provide a fallback value if no input is passed at runtime.

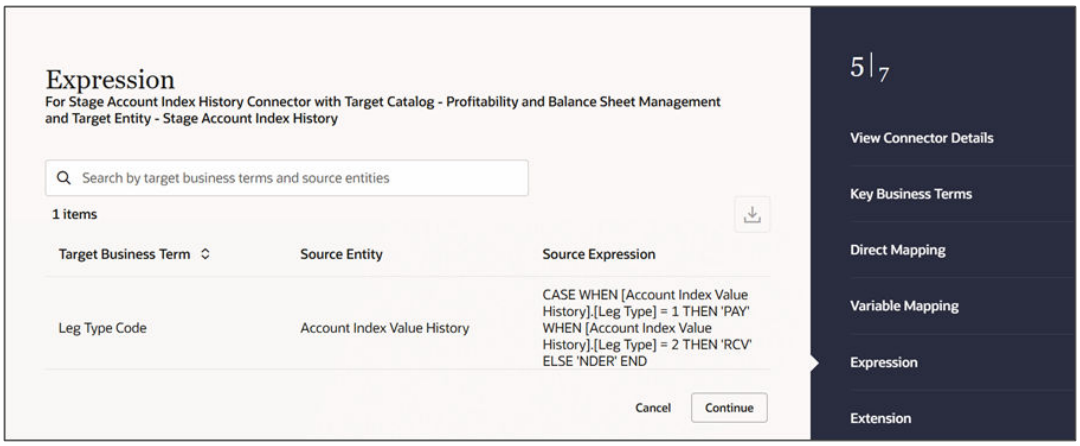
2. Click **Download** to save the mapped entries.

2.5.3.1.4 Expression Mapping

The **Expression** step displays the target business terms using logical expressions or formulas based on source entity data.

1. Navigate to the **Expression** tab (Step 5 of 7 in the connector setup wizard) and view the list of **Target Business terms** and their mapped source entity.

Figure 2-5 Expression Tab



2. You'll be mapping a target business term to a derived value using a SQL-like expression.

3. Review the mappings in the next steps and submit the connector setup when done.

2.5.3.1.5 Application Data Service Connector Extension

The **Extension** tab allows users to view the extension for the existing redefined connector.

- The extension view will display mappings between target business terms and source business terms/entities.
- You can see columns for **Target Business Term**, **Source Entity**, and **Source Business Term**.
- Use the search bar to filter or find specific target or source business terms and entities.
- Review the listed mappings to understand how the extension connects source data fields with the target data structure.
- After reviewing, you can choose to cancel or continue with any further actions such as editing or applying the extension.

3
Catalog Extension

With Catalog Extension, you can extend the seeded Catalog data model to support new or client-specific business use cases. You can create new entity definitions or customize the existing entity definitions based on the use case.

> **Note**
>
> The execution of the Run Pipeline is triggered using the selected Extraction Date.

Table 3-1 Enabled Data Model Extensions in Catalog

Catalog Object Type	Create	Modify	Extend	Delete
Business Term	Yes	No	No	No
Dimension Entity	Yes	No	Yes	No
Fact Entity	Yes	Yes	Yes	No
Data Quality Framework	Yes	Yes	Yes	No

All the points mentioned above are applicable to both Seeded and Custom Objects

- New Business Terms added to fact entities can be dimension references, measures, flag or indicators and alphanumeric attributes without dimensional reference.
- Fact logical entities that are allowed for extensions are product processors, account transactions, accounting entries, Accounting Entries Header and Transaction Header.
- Extensions are allowed to logical entities and physical model modification is controlled by the service.
- Required data flow for the extended entities are auto generated by the system.
- Completes basic data quality checks required for extended entities.

You must identify the additional data requirements to implement in the application through system and business use case analysis. Data model gaps need to be captured in Issues and Action governance framework.

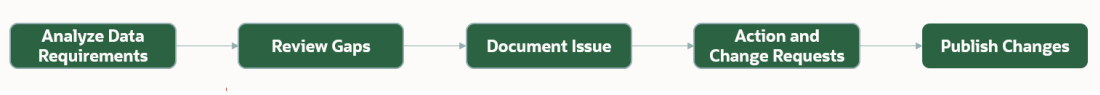
Data model extensions must be designed based on the guidelines provided for each area.

Catalog Result layer is designed as a Star Schema for better performance of Analytical and Reporting queries. Hence it is highly recommended that Dimensional Entities must be created for a pre-defined list of values before adding to the Fact Entities. Adding of alphanumeric attributes for Fact Entities must be avoided wherever possible.

3.1 Catalog Extension - Core

The catalog extension process workflow is as follows:

Figure 3-1 Catalog Extension Process Workflow



- **Analyze**
  - Analyze the requirements based on the existing details in Data Catalog.
  - Use the Catalog Viewer to understand existing Business Terms, logical entities and their properties.
- **Review**
  - Prepare the list of Gaps – additional business terms, dimensions, fact extensions and other associated properties.
  - Document the list of Gaps – group based on type and purpose of extensions.
  - Review the list of Gaps to ensure if the proposed additions are consistent and conformance according to the Data Catalog Extension Principles and Naming Standards.
- **Document**
  - An Issue Administrator will Log an Issue (Category as Catalog Extensions) based on the purpose of the extension. To know how to log an Issue, see the Issues and Actions section.
  - Document the details of the extension requirements in the Issue. Upload the analysis and requirement documents.
  - Assign to the Issue Owner.
- **Action**
  - Issue Owners create Action (Type as Catalog Extension) for the issue. It is recommended to define an action for each type of change. To learn how to create an Action, see the Issues and Actions section.
  - Upload the document containing the list of changes in Action details.
  - Action Owners create or extend the catalog objects based on the type of Change Request.
  - Action Owners submits the action for approval.
- **Publish**
  - Issue Owner reviews submitted actions and approves or rejects along with appropriate comments.
  - After approval no modification is allowed to object definitions.
  - Issue Administrator publishes the approved Action to approve the changes in the Catalog data model.
  - Actions need to be published sequentially and in the logical sequence that would be reflected in schema. To use a Custom BT in a new Dimension Entity or while Extending the Fact, first create and publish the Business Term. Once the BT is published, it will be available in the list of Available Business Terms during creation of Dimension Entity and while extending a Fact.

- You can verify the published Actions from Catalog Viewer for Dimension Entity and Extend Fact Entity.
- Please note that extensions will be reflected in master repository of objects only on Publish and it is mandatory to publish before users can view or consume the object for further extensions.
- If a Publish action is successful, the action is displayed under Publish tab. If a Publish action is unsuccessful, the action is displayed under Approved tab.

> **Note**
>
> * To publish an action, the custom DQ rule must be mapped to at least to one group. A custom rule which is not mapped to any group will not be published.
> * Similarly, to publish an action, the custom DQ group must be mapped to at least one rule. A custom DQ group with no DQs mapped to it will not be published.

3.1.1 Create Business Terms

Based on the Action created, follow the steps below to create a Business Term.

To create a custom Business Term for an Action, do the following:

1. Go to the **Inbox** by clicking the **Inbox** button on the Home page

   The Inbox page is displayed.
2. To create a custom Business Term for an Action, do the following:
   a. Select the required Action for which you need to create a custom Business Term.

      The Action Details Page is displayed.
   b. On the **Extension** tab, click **Create Business Term**.

      The **New Business Term** page is displayed.
   c. On the **Definition** tab, set the following values.

Table 3-2 Business Terms Field Names and Description on the Definition Tab

Field Name	Description
Business Term Logical Name	Type a unique name for the Business Term. By default, the logical name will be appended with the Affix Type which is Prefix and the Affix Value for this prefix is "Custom " with a space in the last before beginning the Business Term. For Example: Custom BusinessTerm1 Type a unique name for the Business Term Logical Name. • The Business Term needs to be long and meaningful. Short meaningless Abbreviations cannot be used. • The Business Term must always be in Camel case. • Logical names must have A to Z and 0 to 9 characters only • The Business Term can consist of alphanumeric without special characters. Maximum allowed length is 150 characters. A single space can be used as a Delimiter to separate the words. **Note** You should not create two Business Terms with the same logical name in different cases. For Example: Business Term1 and business term1.
Classification	Select one of the following categories for the Business Term: • Date and Timestamp • Flag or Indicator • List of Values • Monetary Amount • Numerical Non-Monetary • Text Description • Identifiers

Table 3-2 (Cont.) Business Terms Field Names and Description on the Definition Tab

Field Name	Description
Logical Data Type	Select the required Logical Data Type that defines the Data Type and Length of the Business Term. For more information, see the Logical Data Type and Data Length Table.

Note

If you want to configure the List of Values, select the Logical Data Type from the following list:

Table 3-3 Logical Data Type and Data Length

Logical Data Type	Data Length
Amount	NUMBER(22,3)
Amount_Long	NUMBER(38,6)
Amount_Medium	NUMBER(30,11)
Clob	CLOB
Blob	BLOB
Code_Alphanumeric	VARCHAR2(20)
Code_Alphanumeric_Long	VARCHAR2(60)
Code_Numeric	NUMBER(14)
Currency	VARCHAR2(3)
Date	DATE
Description_Short	VARCHAR2(100)
Description_Medium	VARCHAR2(1000)
Description_Long	VARCHAR2(4000)
Description	VARCHAR2(255)
Flag	CHAR(1)
Indicator	VARCHAR2(1)
Number_Factor	NUMBER(10,6)
Number_Factor_Long	NUMBER(38,15)
Numeric	NUMBER(10)
Numeric_Long	NUMBER(30)
Rate_Percent	NUMBER(11,6)
Rate_Percent_Medium	NUMBER(15,11)
Rate_Percent_Long	NUMBER(30,11)
SurrogateKey	NUMBER(10)
SurrogateKey_Long	NUMBER(15)
Timestamp	TIMESTAMP
Amount_Currency	NUMBER(22,3)
Amount_Currency_Long	NUMBER(38,6)
Amount_Currency_Date	NUMBER(22,3)
Amount_Currency_Date_Long	NUMBER(38,6)
Number_Area	NUMBER(30,3)
Number_Geog_Temp	NUMBER(3,2)
Number_Speed	NUMBER(4,2)

Table 3-2 Business Terms Field Names and Description on the Definition Tab

Field Name	Description
	Table 3-3 Logical Data Type and Data Length | Logical Data Type | Data Length | | --- | --- | | Number_Weight_Ltrs | NUMBER(7,2) | | Number_Distance | NUMBER(10,2) | | Number_Elec_Str | NUMBER(4,2) | **Note** It is recommended to not have more than 10 distinct LOVs (List of Values) for lov codes definition. If the number of distinct LOVs exceeds 10, it is advisable to create a new custom dimension.
Personally Identifiable Information	Select if the Business Term is personal information. The value can be a Yes or No (Enable the Toggle Switch for Yes and disable for No). **Note** All the PII attributes created by the User is enabled for data masking while creating a cloned environment in the system.
Add	Click this button to add this Business Term in the Glossary List
Glossary Name	It is auto-populated based on the logical name of the Business Term.
Glossary Context	It is auto-populated with a pre-defined value (FSDF).
Business Term Description	Double-click on the blank space corresponding to this field and type a proper Description for the Business Term: • It must be a complete sentence with possible indication of data domain and list of values it contains along with business context. • Business term description shall be without special characters. Maximum allowed length is 4000 characters.
Delete	To delete a Glossary item, select the Glossary and click **Delete**.

d. On the **Relationships** Tab, set the following values.

Table 3-4 Business Terms Field Names and Description on the Relationships Tab

Field Name	Description
Add	Click this button to add the Business Term in the Glossary List.
Group Code	Enter an identifier that represents that one Business Term is related to another Business Term. Group Code shall be alphanumeric with maximum 10 characters in length. An existing group code can be mentioned if the new relationship falls into existing group.
Relationship Type	Enter the relationship type that occurs between Business Terms. For more information, see the Related Business Terms.
Related Business Term	Double-click on the blank space corresponding to this field and type a proper Description.
Delete	To delete a Relationship item, select the Relationship and click **Delete**.

e. On the **List of Values** Tab, click **Add** and set the following values.

> **Note**
>
> The Add or Delete options in List of Values tab is enabled only for the Custom Business Terms for the following Data types:
>
> - Flag
> - Indicator
> - Code_Alphanumeric
> - Code_Alphanumeric_Long
> - Code_Numeric

Table 3-5 Business Terms Field Names and Description on the List of Values Tab

Field Name	Description
Code	Enter the code for the LOV. For Example: Y. This is limited to one character and only alphanumeric character is supported and should be unique. The code is case sensitive.
Display Name	Enter the display name for the LOV.
Description	Enter the description for the LOV.

Following are the current behavior of LOV:

- The Business Term with Logical Data Type as Flag, Indicator, Code_Alphanumeric, Code_Alphanumeric_Long and Code_Numeric are allowed to have associated LOV. For other BT types, it is recommended to create a Dimension.
- LOV definition will capture Code, Display Name, and Description.
- The LOV should match the data type and data length of the Business Term.

- The Business Term follows the existing governance validations. For example: You cannot modify after the approval, only Action owner is allowed to modify, and so on. For more details, see the Approval workflow of Issues and Actions section.

Based on the list of values configured for a given custom business terms, the system auto generates data quality rules for the associated entities.

f. Click **Save**.

> **Note**
>
> When you create an Action for the first time and wish to extend the catalog, during a Business Term or a Dimension Entity creation, the following warning is displayed:
> "Please ensure that the affix details are configured. Click **Yes** to proceed with saving the Business Term/Dimension"

A confirmation message is displayed. Click **OK**.

g. On the **Extension** Tab, in the **Business Term Extensions** Section, the new Business Terms are listed.

h. Click **Submit** to submit the Action for approval.

A confirmation message is displayed.

i. Click **Yes** to confirm.

Your confirmation is acknowledged.

> **Note**
>
> Once a Business Term has been Approved or Published, it cannot be modified or removed from the Extension. The properties of an existing Out-of-box Business terms cannot be modified, but any new custom Business Terms which are in only **Draft** status can be modified

> **Note**
>
> If you create any custom Business Term and want to use the same in any of the custom Dimension or in extending a Fact entity, the Business Term alone must be initially published.

3. To update a draft Business Term for an Action, do the following:

a. Click the required Action for which you need to update a Business Term. The Action Details Page is displayed.

b. On the **Extension** Tab, click the Business Term that you need to update.

The Business Term Details Page is displayed.

c. You can update any Field and Click **Save**.

A confirmation message is displayed. Click OK to confirm.

d. On the **Extension** Tab, in the **Business Term Extensions** Section, the new Business Terms are listed. Click outside the Action Details Page to close it.

For information about Approval of Action (for Business Term), see the Approval workflow of Issues and Actions section.

3.1.2 Extend Business Terms

To extend a Business Term for an Action, do the following:

1. Go to the **Inbox** by clicking the **Inbox** button on the home page.

   The **Inbox** page is displayed.

2. To extend a Business Term for an Action, do the following:

   a. Select the required Action for which you need to extend a Business Term. The Action Details page is displayed.

   b. On the **Extension** tab, click **Extend Business Term**. The **Extend Business Term** page is displayed.

   c. Set the following values:

Table 3-6 Business Term Field Names and Description

Field Name	Description
Available Business Terms	Based on the Logical Data Type selected during Business Term creation, select the required Business Term.
Add	Click this button to add the LOV code, name, and description.
Delete	Click this button to remove the LOV data.
LOV table	If List of Values are existing, those are displayed in the table.

Following are the current behavior of LOV:

- You can add `LOV` for an existing custom Business Terms for the `Data Types Flag`, `Indicator`, `Code_Alphanumeric`, `Code_Alphanumeric_Long`, and `Code_Numeric`.
- `LOV` definition will capture Code, Display Name, and Description.
- The `LOV` should match the data type and data length of the Business Term.
- The published `LOV` code cannot be removed or modified.
- You can modify the display name and description for existing `LOV` values.
- The Business Term follows the existing governance validations. For more details, see the Approval workflow of Issues and Actions section.

Table 3-7 Business Terms Field Names and Description on the Relationships Tab

Field Name	Description
Add	Click this button to add the Relationship for Business Term.
Group Code	Enter an identifier that represents that one Business Term is related to another Business Term. Group Code shall be alphanumeric with maximum 10 characters in length. An existing group code can be mentioned if the new relationship falls into existing group.

Table 3-7 (Cont.) Business Terms Field Names and Description on the Relationships Tab

Field Name	Description
Relationship Type	Select the relationship type that occurs between Business Terms from the drop down. For more information, see the Related Business Terms.
Related Business Term	Select the related business term from the drop down.
Delete	To delete a Relationship item, select the Relationship and click **Delete**.

> **Note**
>
> - Users can now add relationships to the Custom Business Terms as well as Out-of-the-Box Business terms.
> - Users cannot add multiple relationships of same type for a Business Term.
> - For an Out-of-the-Box BT, users can only add the Measure GL relationship and the Business Term must be a numerical Data type.

d. Click **Save**. A confirmation message is displayed.

e. Click **OK**.

f. On the **Extension** tab, in the **Entity Extensions** section, the new extended Business Term is listed.

> **Note**
>
> Once an extended Dimension Entity has been Approved, the extension request cannot be modified.

3. If you want to update a draft Entity for an Action, do the following:

a. Click the required Action for which you need to update a Dimension Entity. The Action Details Page is displayed.

b. On the **Extension** tab, click the **Extend Dimension Entity** that you need to update which is in **Draft** status.

c. The **Entity Details** page is displayed. You can update the existing values in the available fields.

d. Click **Save**. A confirmation message is displayed.

e. Click **OK**.

f. On the **Extension** tab, in the **Entity Extensions** section, the new extended Dimension Entities are listed. Click outside the Action Details page to close it.

- Only sourced or custom dimensions (Not seeded) can be extended.
- Once the publish action is complete, the Dimensions will be added with new attributes and also their corresponding SCDs will be modified.
- Also if the added attribute has a DQ associated with it, it will be added to the DQ Group.
- You can view the modified changes to the Dimension using Data Catalog.

3.1.3 Manage Dimension Entity

Based on the Action created, follow the steps below to create a Dimension Entity.

3.1.3.1 Create a Dimension Entity

To create a Dimension Entity for an Action, do the following:

1. Go to the **Inbox** by clicking the **Inbox** button on the home page.

   The **Inbox** page is displayed.

2. To create an Entity for an Action, do the following:

   a. Select the required Action for which you need to create a Dimension. The Action Details page is displayed.

   b. On the **Extension** tab, click **Create Dimension**. The **Create Dimension Entity** page is displayed.

   c. On the **Definition** tab, set the following values.

Table 3-8 Dimension Entity Field Names and Description on the Definition Tab

Field Name	Description
Entity Name	Type a unique name for the Entity. The name should start with the word **Local** with a space in the last before beginning the entity name. For Example: Custom Entity1 • Entity logical name must be in Camel case. • It must have A to Z and 0 to 9 characters only. • It must be alphanumeric with maximum length 120 characters. **Note** You should not create two Entity names with the same logical name in different cases. For Example: Custom ENTITY1 and Custom entity1.
Entity Description	Enter a description for the Entity. **Note** New line character (Enter key) should not be used in the Entity Description field. • It must be a complete sentence with possible indication of data domain and list of values it contains along with business context. • It must be alphanumeric with maximum length 4000 characters.

Table 3-8 (Cont.) Dimension Entity Field Names and Description on the Definition Tab

Field Name	Description
Is data sourced to this entity from an external system	Select if the Dimension Entity has data sourced from external system. The value can be a Yes or No (Enable the Toggle Switch for Yes and disable for No). It is recommended to always enable this switch to source data from external systems as seeded dimension data flow is not supported.
Should this Entity contain hierarchical data	Select if the Dimension Entity contains hierarchical data. The value can be a Yes or No (Enable the Toggle Switch for Yes and disable for No). Keep this switch enabled if not absolutely sure if the new dimension will not contain hierarchical data as modification to published dimensions are not supported and required physical structure and data flow for hierarchical data cannot be enabled later.

Table 3-8 (Cont.) Dimension Entity Field Names and Description on the Definition Tab

Field Name	Description
Available Business Terms	Based on the Logical Data Type selected during Business Term creation, select the required Business Term to be added to the Dimension entity. **Note** You must add a minimum of two business terms such that at least one is a business key (i.e., natural key of the dimension) with an alphanumeric code column, and one is a numerical identifier (its unique numerical value for the corresponding business key). **Note** An error is displayed if you are trying to create multiple dimensions with the same business terms as the business key. If role-based dimensions are required, then it is recommended to create separate business terms for each role and use them as a business key in dimensions. **For Example:** Issuer, Guarantor. • A Business Term is displayed in the Business Terms selection column only after it is published. You can then add the relevant Business Term while creating the Dimension Entity. • Add only slowly changing attributes to dimension entity, don't add numerical measures, surrogate key(s). • Only add functional business terms, standard technical business terms required for a dimension entity e.g. Start Date, End Date, Latest Record Indicator, surrogate key, and Closed Flag will be added by extension service by default. • The Business Term 'Record Creation Date' should not be used for custom extensions. • Flag the BTs which are nullable, by default all new additions and Not Null. • Avoid adding alphanumeric business terms to fact entity(s) which does not have an associated dimension. • The Dimension retire parameter should not be set for custom dimensions. • Business Terms with logical data types SurrogateKey_Long, Numeric and Code_Numeric are mapped as Numeric Identifiers. It is recommended to add a Business Term with logical name that contains the key word name, which defines the business key of the dimension. This will be used to define the child name in hierarchical data.
Add Attribute	Click this button to add the Attribute (Business Term) in the Business Terms List.

Table 3-8 (Cont.) Dimension Entity Field Names and Description on the Definition Tab

Field Name	Description
Remove Attribute	Click this button to remove the Attribute (Business Term) from the Business Terms List.

d. Click **Save**. A confirmation message is displayed. Click **OK**. On the **Extension** tab, in the **Entity Extensions** section, the new Dimension Entity is listed.

- Logical dimension entity definition creates all the required physical structures. The Data flow (SCD) is created by the extension service along with entity definition. You must create a pipeline to add the SCDs created by the extension service.
- When the Hierarchical data toggle button is enabled, a data Flow (Connector) is created by the extension service along with Stage Hierarchy and Dimension Hierarchy. You must create a pipeline to add the Connectors created by the extension service.
- Create a new pipeline and the Data Quality group created for new entity (if any). A single pipeline can be created to add all the newly created Data Quality groups for catalog extensions.

> **Note**
>
> Once a Dimension Entity has been Approved it cannot be modified or removed from the Extension. Once a Dimension Entity has been Approved it cannot be modified or removed from the Extension.

3. If you want to update a draft Entity for an Action, do the following:
   a. Click the required Action for which you need to update a Dimension Entity.

      The **Action Details** page is displayed.
   b. On the **Extension** tab, click the Dimension Entity that you need to update which is in **Draft** Status.
   c. The Entity Details page is displayed. You can update any Field.
   d. Click **Save**. A confirmation message is displayed. Click **OK**. On the **Extension** tab, in the **Entity Extensions** section, the new Dimension Entities are listed. Click outside the Action Details page to close it.

3.1.3.2 Extend Dimension Entity

To extend a Dimension Entity for an Action, do the following:

1. Go to the **Inbox** by clicking the **Inbox** button on the home page. The **Inbox** page is displayed.
2. To extend an Entity for an Action, do the following:
   a. Select the required Action for which you need to extend a Dimension. The Action Details page is displayed.
   b. On the **Extension** tab, click **Extend Dimension**. The **Extend Dimension Entity** page is displayed.
   c. On the **Definition** tab, set the following values.

Table 3-9 Dimension Entity Field Names and Description on the Definition Tab

Field Name	Description
Dimension	Select the appropriate dimension from the drop-down list.
Available Business Terms	Based on the Logical Data Type selected during Business Term creation, select the required Business Term to be added to the Dimension entity. • The Business Term 'Record Creation Date' should not be used for custom extensions. **Note** You must not extend a Dimension or a Fact table with a Business Term of Data Type 'TimeStamp''.
Selected Business Terms	This field displays the selected business terms for the extended dimension entity. • You must add a minimum of one business term. • The default value cannot be empty when nullable is disabled. • The maximum size allowed for the default value is 10.
Add Attribute	Click this button to add the Attribute (Business Term) in the Business Terms List. **Note** You cannot add an Amount column as an attribute in the dimension.
Remove Attribute	Click this button to remove the Attribute (Business Term) from the Business Terms List.

d. Click **Save**. A confirmation message is displayed. Click **OK**.

e. On the **Extension** tab, in the **Entity Extensions** Section, the new extended Dimension Entity is listed.

Note

Once an extended Dimension Entity has been Approved, the extension request cannot be modified.

3. If you want to update a draft Entity for an Action, do the following:

a. Click the required Action for which you need to update a Dimension Entity. The Action Details page is displayed.

b. On the **Extension** tab, click the Extend Dimension Entity that you need to update which is in **Draft** status.

c. The Entity Details page is displayed. You can update the existing values in the available fields.

d. Click **Save**. A confirmation message is displayed. Click **OK**. On the **Extension** tab, in the **Entity Extensions** section, the new extended Dimension Entities are listed. Click outside the Action Details page to close it.

- The seeded dimensions can be extended by only custom Business Terms and custom dimensions can be extended by seeded as well as custom Business Terms.
- Once the publish action is complete, the Dimensions will be added with new attributes and also their corresponding SCDs will be modified.
- Also if the added attribute has a DQ associated with it, it will be added to the DQ Group.

3.1.4 Manage Fact Entity

Based on the Action created, follow the steps below to create a Custom Fact Entity.

3.1.4.1 Custom Fact Entity

A Custom Fact Entity is a tailored data structure designed to store specific factual information within a data system. It serves as a powerful tool for analysis and reporting, enabling you to enhance the data models by integrating customized facts that address unique business needs.

This section outlines the process of creating a custom fact entity, including the necessary validations, attribute selection, and business key configuration.

> **Note**
>
> Create Fact component must be standalone limited to a single Fact entity creation and must not be combined with any other Catalog Extension component(s) in the same action.

Steps to Create a Custom Fact Entity

1. Log in to the OFSAA DFCS portal.
2. Click on the **Inbox** icon. The **Inbox** window is displayed.
3. Click on **Log Issue** icon. The **Create Issue** window appears.
4. In the Create Issue window, enter the following:

Table 3-10 Create Issue

Field	Description
Name	Provide a clear, concise name for the issue. This could be a title or identifier.
Description	Fill in any necessary details about the issue, explaining what is wrong or needs to be addressed.

Table 3-10 (Cont.) Create Issue

Field	Description
Category	Choose the relevant category from the dropdown menu (e.g., Catalog Extension).
Criticality	Determine the urgency or importance of the issue (e.g., "Medium").
Execution Date	Pick the date when this issue should be executed or resolved, using the calendar picker.
Source	Specify where the issue is coming from (e.g., "Key Indicators").
Owner	Choose the team responsible for addressing the issue.
Target Date	Optionally, add any extra comments or context.
Comments (Optional notes or updates)	Choose the target date for completing the issue, using the calendar.
Attach Documents (Optional upload)	If necessary, upload any relevant documents that provide context or detail about the issue.

5. Click **Save** to create the issue.
6. From the inbox window, select the Log Issue from the list, and select **Actions** > **Create**.
7. In the **New Action** window, enter the following details and click **Save**.

Table 3-11 Entity Description

Field	Description
Entity Name	Enter the Entity name. Ensure the following are considered. • Must start with capital letter • No special characters allowed • Maximum 120 characters • Must be unique (no duplicates) • Must conform to prefix/suffix requirement • Must be in CamelCase.
Entity Description	Enter the description. Maximum 4000 characters Newlines, double quotes, slashes characters are not allowed

Table 3-11 (Cont.) Entity Description

Field	Description
Business Terms Selection	a. System will display available Business Terms (BTs). **Note** By default, the **As Of Date** (Nullable) and **Data Source Code** (Business Key) BT attributes will be added. b. Select relevant BTs for your fact entity. **Note** At least one business key attribute must be enabled for fact entity creation. The Business key is the functional key of the selected entity.
Save Attribute	a. Click **Save**. The Entity and Attributes is saved to the logical tables. b. Click **Submit** to save the data and update status on DC_CR object tables. **Note** The **Load Run Identifier** is not mandated.
Validation & Submission	a. Click **Validate Data** to check all fields are updated. b. Review the confirmation prompt: Do you want to submit BT/Entities for Create Fact Entity? c. Click **Yes** to proceed, else click **No** to modify the fields. **Note** Please ensure that the affix details are configured before proceeding.

Table 3-11 (Cont.) Entity Description

Field	Description
Post-Submission	System will display confirmation: All BT/Entities have been submitted successfully for approval. The request will be tracked in the console. a. Click **Approve**, the **Create Fact Entity - Add Comment** window appears b. Enter the reason for approval and click **Save**. A confirmation message appears.
Approval Workflow	a. Navigate to: **Legal Entity** > **Publish Change Request**. Approvers will review the submission, once approved, the fact entity becomes available for use. **Note** Hover over the Custom Fact Entity to view the details that is tagged. b. Click **Publish**.

Note

Troubleshooting Errors:

- **Entity Name invalid** - Verify naming rules.
- **Business Terms not available** - Check if terms were already assigned.
- **System timeout** - Session expires after inactivity.

Note

The Custom Fact Entity created is defined under Extend Fact Entity > Null Grain > Other category. The existing published entities is listed in the Other category. For more information, see Extend Fact Entity.

3.1.4.2 Extend Fact Entity

Based on the Action created, follow the steps below to create an Extend Fact Entity.

To Extend Fact Entity for an Action, do the following:

1. Go to the Inbox by clicking the Inbox button on the home page. The Inbox page is displayed.
2. To Extend Fact Entity for an Action, do the following:

a. Select the required Action for which you need to Extend Fact Entity. The Action details page is displayed.

b. On the **Extension** tab, click **Extend Fact**. The Extend Fact Entity page is displayed.

c. On the **Definition** tab, set the following values.

Table 3-12 Extend Fact Field Names and Description on the Definition Tab

Field Name	Description
Grain/Grain Group	Select one of the following categories for the Entity: • Customer Account Transactions • Accounting Entries • Customer Account • Others
Include Entities	Select an Entity from the list of available entities. **Note** The list of unsupported entities for extension are Dimension, Stage Master and Stage Hierarchy Tables.
Add Entity	Click this button to add this Entity in the Entities List.
Remove Entity	Select the entity, and click this button to remove an entity from the added list of Entities.

Table 3-12 (Cont.) Extend Fact Field Names and Description on the Definition Tab

Field Name	Description
Available Business Terms	Select one or more Business Terms to the Fact Entity: • Nullable: If a Business Term has Null value or not • Default Value: The Default value for the Business Term • Reference Entity: The list of dimensions for which Business Terms is a Business Key. **Note** If you disable the Nullable option for an added Business Term, then it is mandatory to add a default value for the same business term. • Verify the Business Terms that are not already part of the entity(s) to be extended. • Mark the business terms as "Not Null" only when it is absolutely essential. • In case of a BT marked as not null, system mandates to provide a default value as per the data type and data length of BT definition. • Avoid adding alphanumeric business terms to fact entity(s) which does not have an associated dimension. • The Business Term 'Record Creation Date' should not be used for custom extensions. • The system populates the dimension list referenced by a Business Term and allows you to select the referenced dimension entity in case of multiple references. In case of single reference entity, the reference entity is auto-populated. **Note** You must not extend a Dimension or a Fact table with a Business Term of Data Type “TimeStamp”.
Add Attribute	Click this button to add this Attribute in the Business Terms List.
Remove Attribute	Click this button to remove an attribute from the added list of Business Terms.

d. Click **Save**. A confirmation message is displayed.

e. Click **OK**.

f. On the **Extension** tab, in the **Entity Extensions** section, the new Fact Entity is listed. You must select the appropriate grain or group for the entities to be extended and verify if the Business Terms are not already part of the entity(s) to be extended. The Best practice is to add a referenced dimension before adding an alphanumeric Business Terms to the fact entities. You must limit the number of extensions to 100 Business Terms for each Fact Entity. You can create the Data Quality pipeline for the extension generated Data Quality checks for the extended entity.

> **Note**
>
> When an Out-of-the-Box fact entity is selected, only custom business terms are displayed.

3. If you want to update a draft Extend Fact Entity for an Action, do the following:
   a. Click the required Action for which you need to update an Extend Fact Entity. The Action Details page is displayed.
   b. On the **Extension** tab, click the Extend Fact Entity that you need to update.
   c. The Entity Details page is displayed. You can update any Field.
   d. Click **Save**. A confirmation message is displayed.
   e. Click **OK**.
   f. On the **Extension** tab, in the Entity Extensions section, the new Extend Fact Entities are listed.
   g. Click outside the Action Details page to close it.

3.2 Publish Change Request

Approved change requests for Catalog extensions must be published by Administrators to persist the extensions and generate associated configuration.

3.2.1 Publish Change Request Process Workflow

Publish change request process spans across multiple components involving automation of complex configurations as explained below:

Figure 3-2 Publish Change Request Process Workflow

- **Model Upload**
  - The Data catalog extension generates a model artifact in the Object store.
  - The Physicalization of the above model and the object registration will be performed in the system.
- **Slowly Changing Dimensions Publish**
  - The Slowly Changing Dimensions (SCD) definition of new entities that are part of the model are registered with the system.
- **Data Quality Publish**
  - The Data Quality definition of new entities that are part of the model are registered with the system.

- **Data Redaction for GDPR**
  - Any PII attribute part of the Data catalog extension model is implicitly eligible for the redaction which safeguards the data against any unauthorized access and the data theft.
- **Connector Metadata Refresh (ADI Refresh)**
  - This reads the data catalog extension model uploaded in the system and creates ADIs.
  - This is a mandatory activity for any model change.

> **Note**
>
> Steps are automated and internal while triggering publish process.

3.2.2 System Restrictions during Publish Change Request Operations

This section provides information on the operations that can be performed and the system restrictions during a Publish Change Request.

3.2.2.1 Operations which can be performed during Publish Change Request

The following activities are allowed by the system during a Publish Change Request operation.

- Browse Data Catalog
- Balance Reconciliation
- Catalog Extension
- Issues and Actions
- Upload and Download files
- Legal Entity
- Report Analysis
- Access Data Visualization
- System Administration - creating users and modifying user access

3.2.2.2 Operations which cannot be performed during Publish Change Request

The following activities are restricted by the system during a Publish Change Request operation.

- Data Ingestion Connector creation or modification or copy
- Data Extraction
- Process Pipeline Executions

3.3 Publish an Action

To publish an Action, do the following:

1. Go to **My Profile** by clicking the **My Profile** button on the home page.
2. Select **Administration**. The Administration page is displayed.

3. Navigate to the **Publish Change Request** tab. The list of Actions in **Approved** status is displayed.
4. To publish an Action, do the following:
   a. Select the required Action and click **Publish**.

      A confirmation message is displayed. Click **OK** to acknowledge the message.

   b. To view the list of **Fail to publish** actions, click the **Approved** button. The list of actions to be published are displayed.

      > **Note**
      >
      > If a Publish action is unsuccessful, the action is displayed under **Approved** button. You can publish this action again or contact My Oracle Support (MOS) for further assistance.

   c. To view the list of ongoing publish operations, click the **Ongoing** button. The list of ongoing publish operations is displayed.

      > **Note**
      >
      > The publish operation might take up to 2 hours to complete and the User can navigate out of the User Interface and comeback later to check the status of the event. If the publish operation is still **Ongoing** after 2 hours, contact My Oracle Support (MOS) for further assistance.
      > Publish action cannot be performed during an ongoing Process Pipeline execution. The user can perform the Publish action once all the PMF executions are complete.
      >
      > Similarly, Process Pipeline execution should not be performed during an ongoing Publish operation of a Change Request. If a process is triggered during an ongoing Publish, the process will be cancelled automatically, and the status is displayed as **CANCELLED** in the Process Monitor Summary page with an error message **Auto-cancellation could be due to Catalog Publish running in parallel**.

   d. To view the list of published actions, click the **Published** button. The list of published actions is displayed.

      After a Publish action is successful, the User can perform Data Ingestion, view the Catalog Framework and Design pipeline.

3.4 Extension of Glossaries, Glossary Mappings, and ADS Connectors (DFCS Only)

The Extension process allows you to map between Primary Catalog (say, PBSM) and Mapped Catalog (FSDF) for local extensions in Primary Catalog and Mapped Catalog.

3.4.1 Glossary Mapping Extension

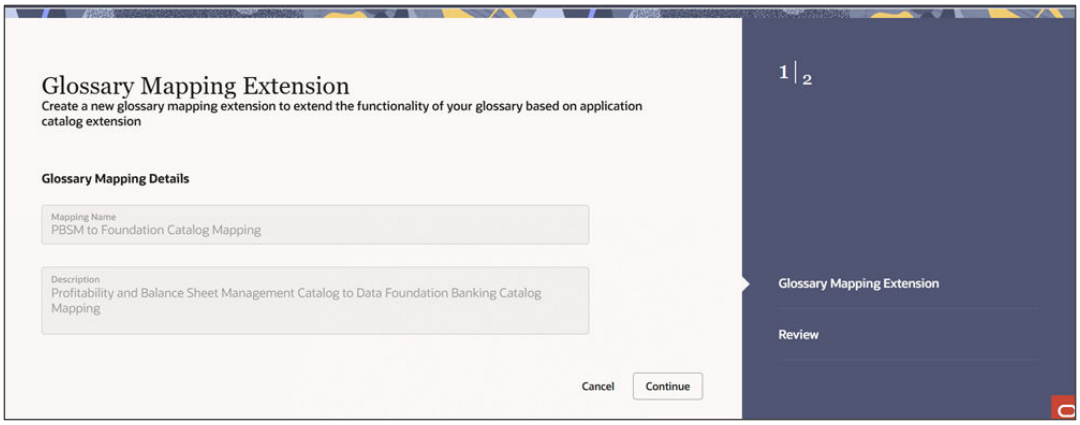
Glossary mappings act as a **blueprint** to ensure that **OCI Applications (PBSMCS)** and **DFCS** interpret business terms consistently. Without these mappings, connectors may exchange

values correctly, but the **business meaning** could differ (for example, *Asset Value* in DFCS versus *Asset Amount* in PBSMCS).

Glossary Mapping Extension allows users to extend existing glossary mappings between PBSM and DFCS by adding or linking new or updated business terms. This ensures that new attributes, such as *Home Equity Amount*, maintain the same business meaning across both systems.

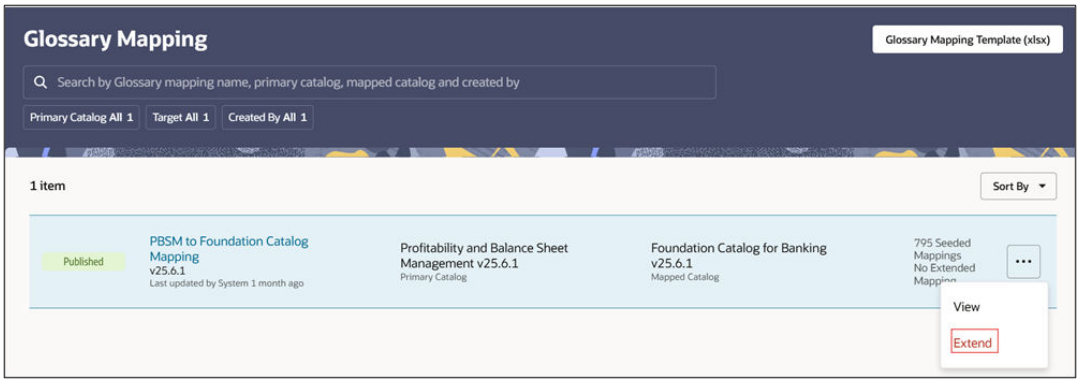
1. Go to **Glossaries** → **Glossary Mapping** page.
2. Use filters to locate the mapping:
   - **Primary Catalog**
   - **Target Catalog**
   - **Created By**
   - Or use the search bar for quicker access to specific mappings.
3. Click on the three dots and select **Extend**. The **Glossary Mapping Extension** window appears.

Figure 3-3 Glossary Extension Mapping



   - The **Mapping Name** and **Description** fields are **predefined** and **non-editable**.
   - These are derived from the original mapping:
     - **Mapping Name:** e.g., *PBSM to Foundation Catalog Mapping*
     - **Description:** e.g., *Profitability and Balance Sheet Management Catalog to Data Foundation Banking Catalog Mapping*
4. Click the three-dot menu (⋮) next to the required mapping and select **Extend**.

Figure 3-4 Extend Glossary Mapping



5. Click on **Select a glossary mapping data file (xlsx) or drop one here.** to drag a pre filled template with the required details.

> **Note**
>
> The maximum file size is 5mb. Use the provided **Glossary Mapping Template (xlsx)** as a base to prepare your mapping file. If you see an error indicator, it means the file is missing or invalid.

6. Add the **logical column name** (e.g., *Home Equity Amount*) and its **description**.
7. Link the **Primary Catalog Business Term (DFCS)** with the **Mapped Catalog Business Term (PBSM)**.
8. Ensure the logical column name prefix matches the **glossary extension prefix**.
9. Save and upload the configured file to complete the glossary extension.

> **Note**
>
> If the business term already exists (e.g., *Home Equity Amount* in Stage Loan Contracts), proceed directly to **Glossary Mapping**.

> **Note**
>
> If the business term does not exist, determine its source:
>
> - **Customer-sourced**: Create a new Business Term (BT) in DFCS using the **Issues and Actions** framework. For more information on creating Business Terms, see Create Business Terms.
> - **Not customer-sourced**: Create a **Derived Business Term (Derived BT)** using existing BTs. For more information on how to Derive Business Terms, see Derived Business Terms.

10. After uploading a valid file, click **Continue** to proceed to the **Review** step. If the file isn't uploaded or valid, the **Continue** button will not proceed.
11. Click **Review and Confirm** to review all entered details. Make changes if necessary and submit to finalize the mapping. At any point, click **Cancel** to exit without saving your progress.

3.4.1.1 Publishing a Glossary Mapping

After uploading the mapping file and completing earlier steps, you will reach the **Review** screen to validate all mapping details before final submission.

1. After reviewing all details, click **Submit** to finalize the glossary mapping extension.
2. If the **Submit** button is disabled, ensure all required steps (e.g., valid file upload) are completed.
3. Click **Cancel** to discard and return without saving changes.
4. Navigate to **Data Foundation for Banking**.
5. Go to the **Glossary Mapping** section.
6. Click the three-dot menu (⋮) next to the required mapping and select **Publish**.
7. Follow the on-screen instructions to publish a glossary mapping.

3.4.2 Application Data Service Connector Extension

The Connector Extension feature allows users to extend or override an existing connector. This is typically required when catalogs have been extended, and the corresponding data service connectors must be updated to reflect these changes.

DFCS provides 38 connectors, of which 16 are extensible. Only instrument category data elements can be extended. You have two options depending on your access rights and configuration permissions:

Scenario	Recommended Action
Modification allowed	Extend the connector (Recommended)
Modification not allowed	Override by creating a new ADS connector

3.4.2.1 Create Custom Connector

This section explains how to create a new custom connector in DFCS to extend or modify the existing connector functionality.

1. Go to the **Application Connectors** page.
2. Download the **Connector Extension Template (.xlsx)** from an existing Application Connectors.
   a. Select any existing published connectors from the list of seeded/ custom connectors.
   b. Click on the **three dots** menu → **Download**.

> **Note**
>
> The connector extension template Excel is used **only** for creating extensions to existing connectors. It is **not** to be used for creating new ADS connectors.

3. Open the downloaded file and enter the required connector details.

> **Note**
>
> Replace the *Base Connector Name* with the **seeded connector name** in the downloaded template before saving.

4. Click **Create New Connector**. The system opens the **Create Connector** wizard. The **Create Connector** page appears with a wizard navigation panel showing six steps:
   a. Create Connector
   b. Key Business Terms
   c. Direct Mapping
   d. Variable Mapping
   e. Expression
   f. Review
5. Click **Select a custom connector data file (xlsx)** to browse and upload your connector definition file.
   - Alternatively, **drag and drop** the Excel file into the upload area.
   - Ensure the uploaded file adheres to the **Connector Extension Template (.xlsx)** structure.
   - The maximum file size allowed is **1 MB**.

> **Note**
>
> If the connector is validated successfully *with warnings*, it means the upload is accepted but certain mappings or configurations may need attention. It is recommended to review and address these warnings (for example: missing optional mappings, unused terms, or missing default values) before publishing to ensure data consistency.

6. Click **Key Business Terms** to view the target business terms to corresponding source business terms. Key business term mappings cannot be edited or modified in this tab because they reflect the base connector's original key business term mappings.
7. Click **Direct Mapping**.
   - View **one-to-one mappings** between target business terms and source entities. Note that only the **Review** option is available and cannot create or modify mappings.
   - Use the **search** option to locate target or source terms quickly.
   - For rows with a **LOV Mapping** (List of Values), click **View** to open the LOV details. The dialog displays columns such as *Behavior Type*, *Behavior Type Name*, and *Application Service Behavior Type Code*.
8. Click **Variable Mapping** to view **system variables** to target terms or assign **default values**. This ensures that runtime variables or file metadata are correctly passed into connector mappings. Users can only **view** or **review** mappings in this tab. Assigning or editing mappings is not permitted here.
9. Click **Expression** to define **formulas or conditional expressions**.

> **Note**
>
> The system displays both **Seeded** (predefined by the application) and **Custom Derived** (user-created) Business Terms in this section. Each BT may have an associated **Expression**, which defines how its value is derived.

10. Verify expressions for syntax and reference correctness (entity/column IDs must match the source entity).
11. Click**Review** to verify all connector details.
12. Once you have confirmed that the information is correct, **click Continue** to proceed.
13. After making necessary edits and reviewing mappings, the connector's status updates to **Validated**.
14. To finalize, click the **three-dot menu ( )** beside the connector entry and select **Publish Connector** to make it available for use. You can also click **Download** to export the connector definition.
15. To exit without saving, click **Cancel**.

3.4.2.1.1 Edit Custom Connector

This section explains how to edit an existing custom connector to extend its functionality in DFCS.

1. From the **Application Connectors** page, locate the connector you want to modify.
2. Use the search or filter options (by **Connector Name**, **Source Catalog**, **Target Catalog**, or **Created By**) to quickly find your connector.
3. Each connector entry displays its **status** (e.g., *Validated*, *Published*), **catalog information**, and the number of **seeded mappings**.
   Example: *UITest_Stage Asset - Cards*, *Profitability and Balance Sheet Management v25.6.1 → Foundation Catalog for Banking v25.9.1*.
4. Click the **three-dot menu ( )** next to the connector you wish to edit.
5. From the menu, select **Edit**. This opens the **Edit Connector** wizard.
6. The **Edit Connector** wizard consists of six steps, displayed on the right panel:
   a. **Edit Connector**
   b. **Key Business Terms**
   c. **Direct Mapping**
   d. **Variable Mapping**
   e. **Expression**
   f. **Review**
7. Upload Custom Connector Data File
   a. In the **Edit Connector** step:
      - The **Connector Name** and **Base Connector Name** fields are auto-populated and read-only. Example:
        – Connector Name: *UITest_Stage Asset – Cards*
        – Base Connector Name: *Stage Asset – Cards*

b. Under **Upload custom connector data file**, click **Select a custom connector data file (xlsx)** or **drag and drop** the Excel file into the upload box.
   - The file must follow the **Custom Connector** template format (.xlsx), downloaded file. It is not the generic Connector Extension Template.

8. After making necessary edits and reviewing mappings, the connector's status updates to **Validated**.
9. To finalize, click the **three-dot menu ()** beside the connector entry and select **Publish Connector** to make it available for use.

3.4.2.1.2 Overriding a Connector

If direct modification is **not allowed**, create a **new ADS connector** by overriding the factory-shipped one.

1. From **Application Connectors**, select the existing connector you wish to override.
2. Click **Download Configuration File**.
   Open the downloaded file and edit the following fields:

Field	Description
Base Connector Name	Must match the original connector name
Connector Name	The new name you want to assign
Source–Target Linkage	Define the Source BT → Target BT relationships
Mapping Type	Specify the mapping method (Derived, Direct, Lookup, etc.)

> **Note**
>
> *Ensure that only valid instrument category data elements are included.*

3. Go to, **Application Connectors > Create New Connector**.
4. Upload the modified configuration file.
5. Proceed through the wizard to:
   - Review **Business Terms (BTs)**
   - Validate **Mappings**
   - Confirm **Entity Relationships**
   - Save and activate the new connector.

3.4.2.1.3 Discard Draft

The **Discard Draft** option allows you to remove a draft or discard any recent changes made to a connector that has not yet been published.

1. From the **Application Connectors** page, locate the connector you want to discard.
2. Click the **three-dot () More Actions** icon on the right side of the connector row.
3. Click **Discard Draft**.

   This initiates the discard draft process and opens a confirmation pop-up.

4. Click **Yes** to proceed with discarding the draft else click **No** if you want to cancel and keep the connector draft.

> **Note**
>
> The **Discard Draft** option is only available for connectors in a **draft** state. For **published** connectors, you must **extend** them to apply any required changes.

3.4.2.1.4 Viewing Version History

The **Version History** option allows you to view both the **subscriber** and **publisher** application versions of a connector, along with an option to download any listed version. This feature provides a centralized view of all system-generated versions, displaying key details such as the version number, creation date, and the user or system that created the version. By offering visibility into previously released versions, Version History helps users track updates, verify changes, and download older versions when needed for reference or reuse for both custom and out-of-box connectors. This feature is available for both **custom** connectors and **out-of-the-box** connectors.

1. From the Application Connectors page, locate the connector you want to modify.
2. Use the search or filter options (by Connector Name, Source Catalog, Target Catalog, or Created By) to quickly find your connector.
3. Click the **three-dot menu ( )** next to the connector you wish to view history.
4. Click **Version History**.
5. A Version History page will open displaying:
   - Version Number
   - Created By
   - Created On (date & time)
   - Actions
6. If you want to download the connector, click the **Download** icon under Actions to export it.

4

Issues and Actions

In **Issues and Actions**, the following tasks can typically be performed:

- Catalog Extension
- Data Privacy
- Data Security
- Data Authorization
- Data Availability
- Data Accuracy
- Data Entry

The Issues and Actions feature enables users to address and resolve data-related issues within the cloud framework. These issues may include Data Quality, Privacy, Security, Availability, Accuracy, and Adjustments. Additionally, users can perform Catalog Extensions, such as creating and extending Business Terms, extending Fact Entities, and Dimension Entities.

4.1 Issues

On the **Inbox** Page, you can log an Issue and create a set of Actions for that Issue. Users can select the appropriate **Action Type** based on the requirement. For instructions to log or manage an Issue, see the Manage an Issue section in the Tracking and Work flow section.

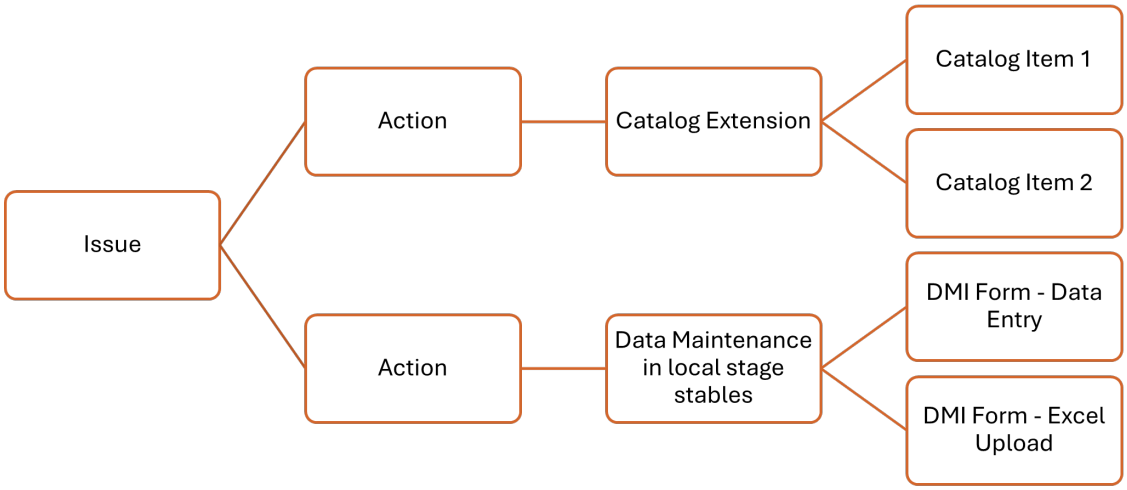
4.2 Actions

After logging an issue, you can define a set of actions for it on the **Inbox** page. As part of an action, you have the option to create a Business Term. For detailed instructions on logging or managing an action, refer to the Manage an Issue section in the Tracking and Workflow section.

4.3 Tracking and Work flow

The Inbox page displays all user tasks, including Issues and Actions. Issues can be logged manually, initiated by a Governance Process, or reassigned from another user. Actions, which are remedial tasks to resolve an issue, can involve various processes such as adjustments, catalog extensions, direct data entry into stage tables via DMI, and Data Quality name creation. The Notification tab provides an overview of the latest tasks assigned to the user.

Figure 4-1 Tracking and Work flow



4.3.1 Manage an Issue

This section outlines how to create, update, close, reopen, or delete an issue within the system.

4.3.2 Create or Log an Issue

To create an Issue, perform the following steps:

1. Navigate to the Inbox by clicking **Inbox** on the home page.

   The Inbox page is displayed.

2. On the **Inbox** page, click **Log Issue**.

   The **Create Issue** page is displayed.

3. Set the following values.

Table 4-1 Issues Field Names and Description

Field Name	Description
Name	Type a unique name.
Description	Type a description.

Table 4-1 (Cont.) Issues Field Names and Description

Field Name	Description
Category	Select the required Category: • **Data Authorization** • **Data Privacy** • **Data Security** • **Data Accuracy** • **Data Availability** • **Timeliness** • **Catalog Extension**: Use this if you want to extend the out-of-the-box Data Structure.
Criticality	Set the criticality level for the Issue as: • **Low** • **Medium** • **High**
Target Date	Select the date till when you need this Issue to be active.
Execution Date	Select the date for executing this Issue.
Source	Select a source for the Issue: • – **Controls**: Defines the operational and quality controls on every data element and monitors the effectiveness of the control. – **Key Indicators**: Monitors all the key metrics, trends of the metrics, variances, and so on, for the data elements. – **Catalog**: To create the Business Term that comprises of elements supporting the business needs of the financial industry.
Owner	Select the required owner for the Issue.
Comments	Add comments for the Issue, if required.
Attach Documents	Use this to attach documents relevant for this Issue. The file format can be of type: .xls, .pdf, .txt or .doc.

4. Click **Save**.

   A confirmation message is displayed.

5. Acknowledge the confirmation message. The new Issue is listed on the **Inbox** page marked with **New** status along with its details.

4.3.3 Update an Issue

To update an existing Issue, perform the following steps:

1. Navigate to the Inbox by clicking **Inbox** on the home page.

   The Inbox page is displayed.

2. On the **Inbox** page, click the required Issue.

   The **Issue Details** page is displayed.

3. You can edit the **Description**, **Category**, **Criticality**, **Target Date**, **Owner**, **Comments**, and **Attach Documents** fields.
4. Click **Update**.

   A confirmation message is displayed. Acknowledge the confirmation message.

4.3.4 Close an Issue

To close an existing Issue, perform the following steps:

1. On the **Inbox** page, click the required Issue.

   The **Issue Details** page is displayed.
2. Click **Close**.

   A confirmation message is displayed.
3. To close the Issue, click **Yes**.

   A confirmation message is displayed. Acknowledge the message.

4.3.5 Reopen an Issue

To reopen a closed issue, follow these steps:

1. Navigate to the **Inbox** page and select the closed issue you wish to reopen.

   The Issue Details page will be displayed.
2. Click the **Re-open** button.

   A confirmation message will appear.
3. To confirm and reopen the issue, click **Yes**.

   Another confirmation message will be displayed. Acknowledge the confirmation message to complete the process.

4.3.6 Delete an Issue

To delete an Issue, perform the following steps:

1. On the **Inbox** page, select the required **Issue**.
2. Click **Delete**.

   A confirmation message is displayed.

> **Note**
>
> Ensure that you close all the Actions associated with the Issue and then close the Issue.

3. To delete the Issue, click **Yes**.

   A confirmation message is displayed. Acknowledge the confirmation message.

   Alternatively, to re-open, close, delete an Issue, on the **Inbox** page, select the required Issue, click the menu associated with the Issue, and select **Re-open** or **Close** or **Delete** respectively, and follow further instructions as mentioned in the preceding sections.

4.3.7 Manage an Action

This section outlines how to create, update, close, reopen, or delete an action.

4.3.8 Create an Action

To create an Action, perform the following steps:

1. Navigate to the Inbox by clicking the **Inbox** button on the home page.

   The **Inbox** page is displayed.

2. On the **Inbox** page, select the required Issue for which you need to create an Action.

   The **Issue Details** page is displayed.

3. On the **Actions** tab, click **Create**.

4. Set the following values.

Table 4-2 Actions Field Names and Description

Field Name	Description
Action Type	Select the required **Action Type**: • **Data Adjustments - DQ Errors** • **Data Adjustments -Others** • **Data Adjustments - Regulatory Reporting** • **Reconciliation Adjustments** • **Others** • **Catalog Extension**: Use this to extend the out-of-the-box Data Structure. • **Note** If you select the **Adjustment** based Action Type, then on the **Action Details** page, **Adjustments Tab** is displayed, where you can create an Adjustment for the Action. If you select the **Catalog Extension** Action Type, then on the **Action Details** page, **Extension Tab** is displayed, where you can create a Business Term for the Action. • **Data Entry**: Use this if you want to edit or add data to the master table directly. This allows to edit data through Data Entry forms and through Excel upload as well.
Criticality	Set one of the following criticality levels for the Action: • **Low** • **Medium** • **High**
Start Date	Select the beginning date in the range on which you need this Action to be executed.

Table 4-2 (Cont.) Actions Field Names and Description

Field Name	Description
Target Date	Select the last date in the range within which you need this Action to be executed.
Owner	Assign the required Owner for the Action.
Comments	Add comments for the Action, if required.
Attach Documents	Use this to attach documents relevant for this Action. The file format can be of type: .xls, .pdf, .txt and .doc.

5. Click **Save**.

   A confirmation message is displayed. Acknowledge the confirmation message.

6. Click outside the Action Details page to close it. The new Action is listed on the **Inbox** page with the status marked as **New** along with the other Action details.

4.3.9 Creating Issue and Action for DMI

You can resolve any data issue identified in the Cloud framework by creating Issues and appropriate Actions on the Inbox page.

To Add/Edit data directly in the Stage master entities, follow these steps:

Ensure the **DMI forms** have been created and approved for the specific entity before making any changes.

- For detailed steps on creating a DMI form, refer to:
  - **Creating Forms using Excel Upload**: For bulk entries through Excel uploads.
  - **Creating Forms using Data Entry**: For single or limited entries through the Data Entry Designer form.

Once the DMI form is ready and approved, you can proceed with issues and actions. For more information, see Create an Action for DMI.

4.3.9.1 Adding Data to Entity – Forms created using Data Entry

For Data Management through Data Entry.

1. Navigate to the inbox by clicking **Inbox** button on the home page.

   The **Inbox** page is displayed.

2. On the **Inbox** page, select the required Issue for which you need to create an **Action**.
3. Select **Data Entry** in the Action Type.
4. You can edit the Description, Criticality, Start Date, Target Date, Owner, Comments, and Attach Documents fields.
5. Click **View more** to open Data Entry tile.
6. Select the **Form ID**. Refer to Configuring Data Entry for creating the form.
7. The Data Entry form for the Stage entity associated with the Form name is displayed in a new window.
8. Click on **Add** [+] button to start adding data. For adding subsequent data, the user can click on the three dots and then select the **Edit** button.

9. Enter data as in accordance to the Data Type for the specific field in the entity.
10. Click **Update** to add to data list. Repeat the above steps to keep adding data.
11. To edit a row, click the three dots in the Actions column and select **Edit**.
12. To Delete any row(s), select the intended row(s) and click the **Delete** icon to delete the selected row(s).
13. Once Data is added / modified, click on **Save** in the inner Data Entry window.

> **Note**
>
> You can edit an existing entity record and save the changes. Clicking **Delete** will remove all unsaved records, even those that have not been selected.

14. You can return to the saved form any number of times before submitting the action. After submitting the action, the form can still be viewed, but modifications are only allowed when the action is in a **New** or **Returned** state.

> **Note**
>
> **Changing the Form**:
>
> - Users can select a different form from the drop-down menu when the action is in either **Draft** or **Returned** state.
> - Only one form can be associated with a specific Data Entry type action.
>
> If the user selects a different form:
>
> - A **confirmation message** will be displayed.
> - If confirmed, **all intermediate data** (draft or awaiting records) from the previous form will be deleted.
> - **Note:** The user must have **Delete permission** mapped for the previous form under User Security in order to perform this action.
>
> **Closing Data Entry Action:**
>
> - Closing a data entry action will also **clean up all its intermediate data** (draft/ awaiting records).
> - For the user to close the data entry action and delete the intermediate data, the **Delete permission** must be mapped for the form under **User Security**.

15. When the form is ready for submission, click the **Submit** button on the Action screen. The Action will then be sent to the Action owner for approval.

    Submitting the Data Entry form will move the records from Draft Status to Awaiting Status.

    Refer to Approve an Action and Return an Action for Approving or Returning the action.
16. Once the Action Owner approves the action, the form is ready to be Published.

    Refer to Publish an Action to Publish the Data Entry action.

> **Note**
>
> Entities list is cached in a service, which gets refreshed every 2 hours. When you create a new dimension via Catalog, it would get reflected after the next refresh cycle. Only one form can be associated to one Data Entry type of action and if user picks a different form then a confirmation message will be displayed, and when confirmed then all the intermediate data (draft/awaiting records) of previous form's will be deleted.

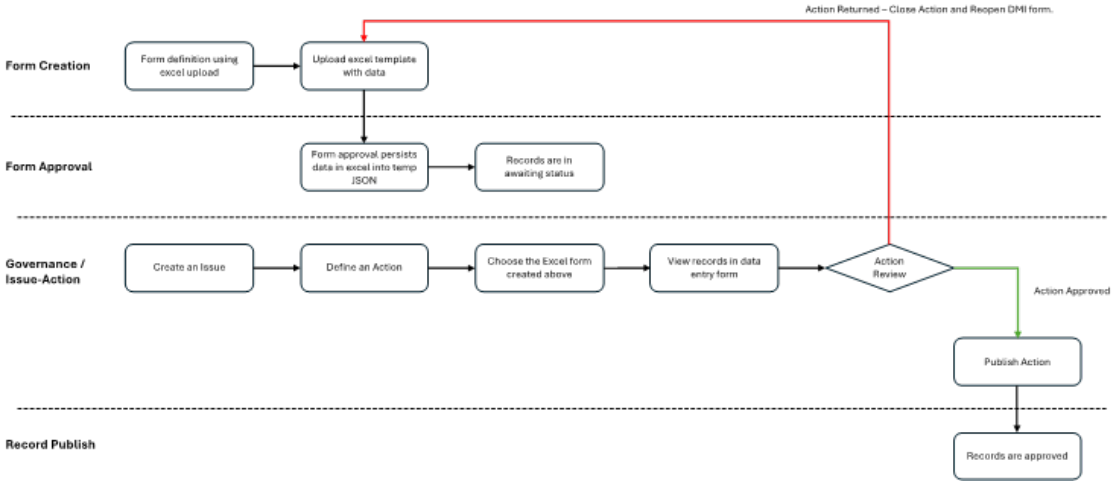
> **Note**
>
> - Closing a Data Entry action will also remove all its intermediate data.
> - Only one form can be associated with a Data Entry type action. If the user selects a different form, a confirmation message will appear. Upon confirmation, all intermediate data (draft/awaiting records) from the previous form will be deleted.
> - The user who submits a Data Entry action cannot return or publish the same action.

17. **Submitting a Data Entry Action**: The user who submits a Data Entry type action cannot return or publish the same action.
18. **Post-Publish Action**: Once the action is published, successful records will be published, and failed records will be moved back to the Draft state of the same form. A new action can be created with the same form to edit the failed records (moved back to Draft) for correction.
19. **Viewing Record Counts**: The count of failed and successful records can be viewed by clicking on the **Published Actions** > **Publish Change Request** tab.
20. **Troubleshooting Failed Records**: For failed records moved back to the Draft state, click on the Options (three dots) and then select **Audit** to view the reason for the failure.

4.3.9.2 Adding Data to Entity – Forms created using Excel Upload Excel Workflow

For Data Management through Excel Upload.

Figure 4-2 Upload Excel Workflow



1. Create a form in DMI using the Configuring Excel Upload. The excel template with the actual data is uploaded in the from creation.
2. Approve the DMI form.
3. Navigate to the Inbox by clicking the Inbox button on the home page. The Inbox page is displayed.
4. On the Inbox page, select the required Issue for which you need to create an Action.
5. Select **Data Entry** in the Action Type.
6. You can edit the Description, Criticality, Start Date, Target Date, Owner, Comments, and Attach Documents fields.
7. Click **View more** to open Data Entry tile.
8. Select the Form created in step 1 with the Excel upload.
9. The Designer form for the Stage table associated with the Form name is displayed.
10. The Form is already in the **Awaiting** status. No modifications are allowed in this stage.
11. Click the **Submit** button on the Action screen. The Action goes to the Action owner for approval.
12. Once the Action Owner approves the action, the form is ready to be Published.
13. Refer to Approve an Action and Return an Action for Approving or Returning the action.
14. Refer to Publish an Action to Publish the Data Entry action.

> **Note**
>
> No validation of data in the excel is currently performed. The user needs to manually verify the data before proceeding to upload while creating the DMI form. Should there be errors at the time of Publish Change Request, the user will be notified the numbers of records Passed and Failed. The user can remediate for the failed records using the Issue/Action – Publish procedure.

4.3.9.3 Update an Action

Follow these steps to update an existing Action:

1. On the **Inbox** page, click the required Action.

   The **Action Details** page is displayed.

2. You can edit the **Description**, **Action Type**, **Criticality**, **Start Date**, **Target Date**, **Owner**, **Comments**, and **Attach Documents** fields.

3. Click **Update** to save the modifications.

   A confirmation message is displayed.

4. Review and acknowledge the confirmation message.

5. Click outside the **Action Details** page to exit.

4.3.9.4 Approval Workflow for Issues and Actions

This section provides information on the approval workflow for the created issue and the submitted action in Data Foundation.

4.3.9.5 Issue Action Workflow

The Issue owner has the privilege to view and approve the Actions submitted by the Action owner. Actions once approved cannot be edited further; all the extensions will be disabled for further modifications.

Figure 4-3 Approval Workflow for Issues and Actions

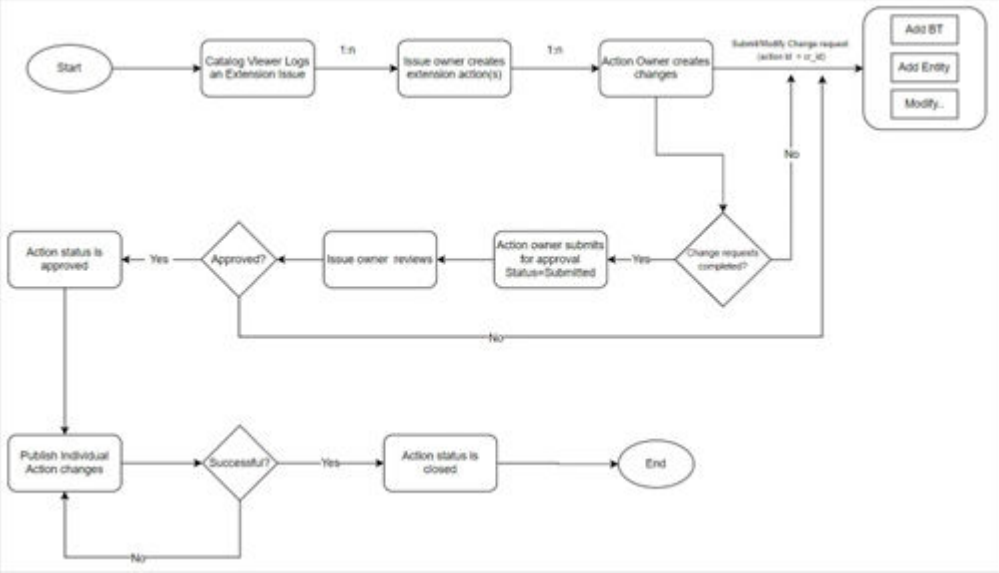
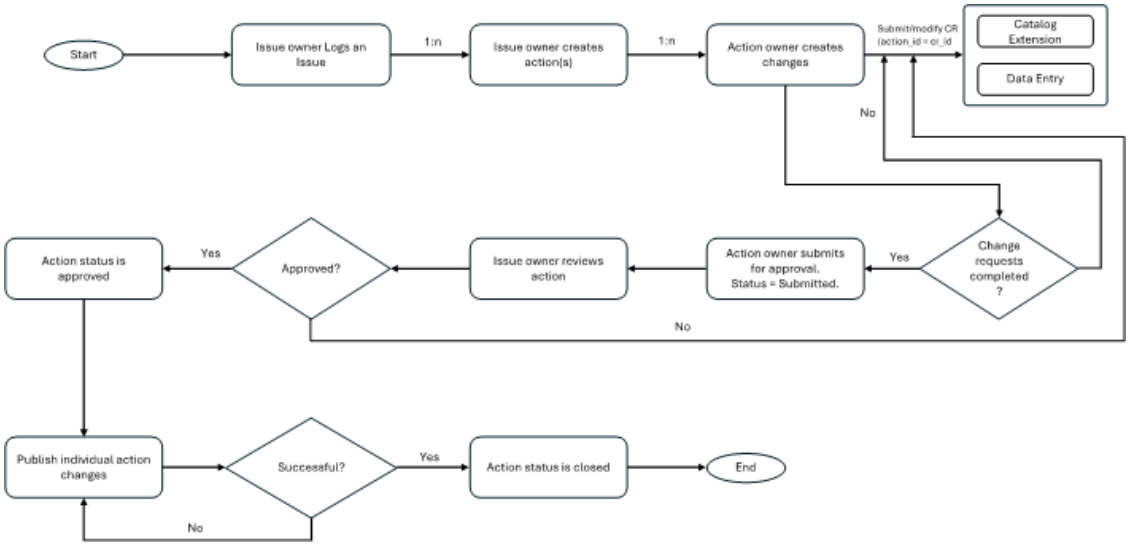


Figure 4-4 Approval Workflow for Issues and Actions Start



4.3.9.6 Approve an Action

To approve an Action, follow these steps:

1. On the **Inbox** page, click the required **Action** that is in **Submitted** status.
2. View the submitted action and the corresponding **Business Term** details.
3. Click **Approve** to proceed.

   A confirmation message is displayed.
4. Enter the reason for approving the submitted action, and click **Save** to confirm.
5. Review and close the acknowledgment message.
6. Click outside the **Action Details** page to close it.

4.3.9.7 Return an Action

To return an Action, follow these steps:

1. On the **Inbox** page, click the required Action.

   The **Action Details** page is displayed.
2. View the submitted Action and its corresponding **Business Term** details.
3. Click **Return** to proceed.

   A confirmation message is displayed.
4. Enter the reason for rejecting the submitted action, and click **Save**.

   A confirmation message is displayed.

> **Note**
>
> You can modify Action details and re-submit it for approval.

5. Close the acknowledgment.
6. Click outside the **Action Details** page to close it.

4.3.9.8 Close an Action

To close an Action, follow these steps:

1. On the **Inbox** page, click the required Action. The **Action Details** page is displayed.
2. Click **Close**. A confirmation message is displayed.
3. To close the Action, click **Yes**.
4. Close the acknowledgment. A confirmation message is displayed.
5. Close the acknowledgment.
6. Click outside the **Action Details** page to close it.

4.3.9.9 Reopen an Action

To reopen an Action, follow these steps:

1. On the **Inbox** page, click the closed Action that you want to reopen. The **Action Details** page is displayed.
2. Click **Re-open**. A confirmation message is displayed.
3. To reopen the Action, click **Yes**. A confirmation message is displayed.
4. Review and close the acknowledgment message.
5. Click outside the **Action Details** page to close it.

4.3.9.10 Delete an Action

To delete an Action, follow these steps:

1. On the **Inbox** page, select the required Action.
2. Click **Delete**. A confirmation message is displayed.
3. To delete the Action, click **Yes**. A confirmation message is displayed.
4. Close the acknowledgment.
5. Click outside the **Action Details** page to close it.

   Alternative Method:
   To **Re-open, Close, or Delete** an Action:

   a. On the **Inbox** page, select the required Action.
   b. Click the **menu** associated with the Action.
   c. Choose **Re-open, Close, or Delete** as needed and follow the relevant instructions from the preceding sections.

4.3.9.11 Create or Update a Business Term

To create or update a Business Term for an Action, see the Manage Business Terms section in the *OFS DFCS Data Catalog User Guide*.