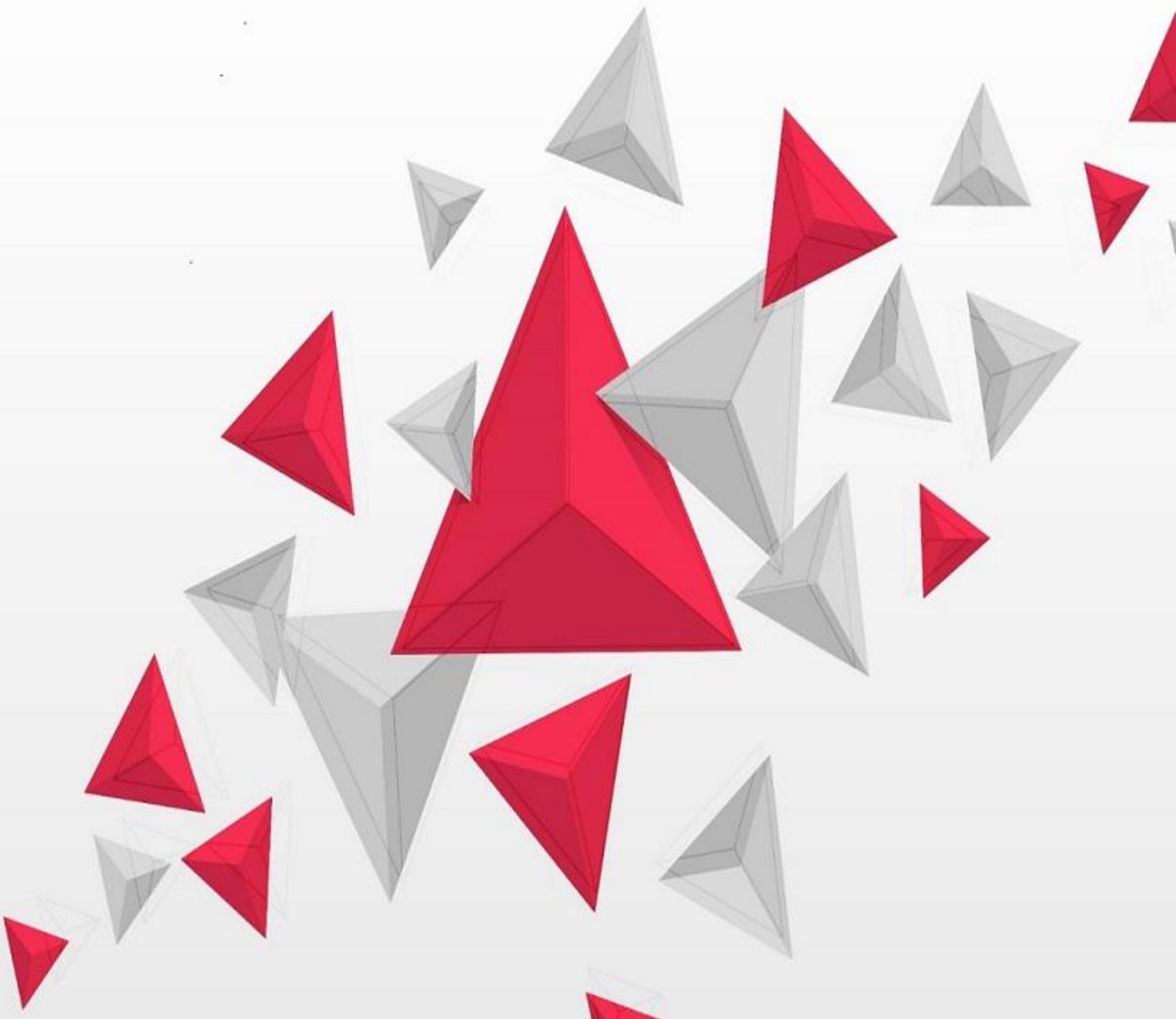


Glossary

Guide Book





GLOSSARY – INTRODUCTION

Let's begin this chapter with an amusing incident that happened when I was demonstrating an application to a group of guys from Corporate Finance (not a very technical audience). In the middle of the demo, I said something like, "This application boasts of rich, interactive GUI, and multiple users can interact with the application at the same time. Also, the user requests are processed in FIFO order..."

At the end of the presentation, during the 'Questions' round, one gentleman commented, "Hey, excellent presentation there, but don't you want to tell us who is Miss. Gui and Mr. Feefoo?"

Although a spell of laughter followed his comment in the room, however, I was a bit embarrassed at not elaborating those acronyms in the first place.

Many terms and acronyms used in requirement documentation are subjected to misinterpretation as we tend to write based on our knowledge and vocabulary while thinking little about our prospective readers' technical or educational backgrounds.

The most appropriate way to avoid such confusion is to have a **standard and formal document containing the definitions of all the terminologies used within the project, much like a dictionary or, more appropriately, a Project Dictionary.**

You probably would have guessed by now that I am talking about having a separate 'Glossary document' for your projects (yaa... another document) and how it stops your readers from getting lost in translation!

Before you start cursing me for tricking you into creating another document, note that creating a separate glossary document will make your work less when compared to creating a glossary section for every important requirement document you create!

Are you feeling better already?



ASPECTS OF A GLOSSARY

Let's dive a bit deeper to see the aspects and benefits of a glossary.

1. The boundaries and scope of a glossary are beyond your project

A glossary is a document that contains an alphabetical listing of terms and their definitions, which are exclusive and unique to your project, the *domain* of your project (finance, banking, government, etc...), the *industry* (information technology, manufacturing, etc...) you are working within and your *organization*.

Think of your glossary as a reference document using which anybody, from any walk of life, will be able to make sense out of your project's material.

2. A significant aid in developing a shared understanding of the project requirements

A project combines stakeholders belonging to diverse domains having different contexts and priorities. For instance, your business stakeholders will understand what strategic objectives, business vision, and return on investment mean, but, likely, the developers don't. Similarly, they know what enterprise architecture, SaaS, and application servers are, but the business folks don't have a clue!

If you want to ensure that everybody gets the same *and* intended meaning out of your requirement documents, it's imperative everybody is provided with a clear definition before they start to *speculate* the implications.

3. Easy to create and maintain throughout the project lifecycle

A glossary is probably the easiest yet highly effective document a BA could author as it can be created through a simple word document or spreadsheet and can be updated as and when complex terms or jargon are encountered. A minimalistic glossary will contain only two fields – the ‘term’ and its ‘definition,’ and if required, it can be made comprehensive by adding additional fields like an alias, domain, related terms, etc..

4. Removes ambiguity and fosters consensus

The project glossary is an excellent document to remove ambiguity around the project terminology, and there are no doubts about it. However, many stakeholders fail to refer to it, resulting in disagreements.

Let me tell you a little secret to deal with this – Humans (and not stakeholders!) get offended when they are taught without their permission. However, if you politely ask them to *refer to* a document or article, they are more than willing to comply.

The reason, you ask?

When you ask somebody to *refer* something, it is subjected to their ‘free will’ as they might or might not. The mind interprets it as a ‘suggestion’ and makes them feel in charge of the decision resulting in complying with your suggestion!

However, when you teach a concept to somebody outside their will, their mind interprets it as an ‘imposed’ understanding – something bound to get a refusal.

So, in my brainstorming sessions, whenever there was a situation of confusion or disagreement against a term, jargon, or acronym, I always used to ‘*suggest*’ referring the glossary document. 4 out of 5 times, it used to do the trick resulting in saving the time and restoring consensus amongst the members.

5. Handy project refresher document

Agree to it; a BA has to work on multiple projects simultaneously, and being out of a project for a couple of weeks is enough to throw you off the project requirements and concepts. Now, if you are boarded again on the project, it’s essential to refresh the concepts as soon as possible – and that’s where the glossary comes in handy!

Going through the project-related terms listed in the glossary helps you rekindle those dormant neurons containing the project information and revives your old memories

within no time – much like looking at an odd scene of an old movie and recalling the complete plot instantly.



AUDIENCE OF A GLOSSARY

A project glossary is one document that a whole lot of stakeholders can reference - It can be referenced by the **project manager, development community, business community, vendors, 3rd party stakeholders, quality team**, and the **external and internal audit team**.

However, the intent of all these stakeholders is the same: to gain an accurate, relevant, and shared understanding of all the terms (both technical and business-related), phrases, and acronyms being used throughout the project artifacts.

Knowing the importance of collective understating of specialized project terminology, the business analyst should encourage all the project stakeholders to use the glossary document to the fullest and ask them to suggest revisions to the glossary if some terms are found to be missing or are newly introduced to the project. Better still, some of the experienced project members like the senior developers, technical lead, or the QA lead can be given the privilege of editing the project glossary on their own by supplementing it with new project terminologies.

Such a practice will ensure that the glossary remains updated at any point in time, along with providing the participation of the project members. Also, this practice is quite common, and one of the core practices of Agile Modeling and is called 'Collective Ownership'.

With this, let's learn how to create a Glossary document.



HOW TO CREATE A GLOSSARY

It's relatively easy to create the glossary document, and we will now see how to go about creating one.

1. This is one lesson that, for sure, will be pretty helpful if you are creating a glossary for the first time. *Never make a glossary from scratch; instead, use some existing resources as a starting point.*

You can use the glossary of other projects within your organization or even the pre-filled reference glossary template available as a supplement to this lesson. I have a list of resources that you can use to kick start your glossary, and it's described under the best practices section of this document.

2. Let's consider you don't have any reference document at your disposal, and you have to create a glossary. Now, at the bare minimum, your glossary should contain at least two fields or columns:
 - **'Terms,'** i.e., the unique words, phrases, acronyms, or jargon that are a part of your project documents.
 - **'Definition'** is the exact, unambiguous meaning of the terms explained in the context of your project. Definition defines the boundaries of the usage of that term within the project.

Since we don't have any references to start with, your task is to find out the terms that are unique to your project. Rather than going through all the project documents trying to find our terms that require a definition, a more structured way is to segregate the terms in various logical sections. Let's learn through an example:

- **Section 1 – Project**

Try and list down all the terms specific to your project. Some examples of functional project terms could be:

- | | | |
|---------------|---------------------|-------------|
| ▪ Tool | ▪ Customer / Client | ▪ Dashboard |
| ▪ Application | ▪ Stakeholders | ▪ Users |
| ▪ Portal | ▪ Project Team | ▪ Modules |

Similarly, examples of technical project terms include:

- | | | |
|---------------------------|------------------------|------------------------------|
| ▪ SaaS | ▪ ITSM | ▪ Analytics |
| ▪ Response Time | ▪ Development | ▪ Servers |
| ▪ Enterprise Architecture | ▪ Application security | ▪ Search Engine Optimization |

- **Section 2 – Domain**

If your project belongs to the ‘banking’ domain, the following terms shall be in the glossary:

- | | | |
|-------------|-------------|--------------|
| ▪ Liquidity | ▪ Repo rate | ▪ Collateral |
| ▪ Mortgage | ▪ Bonds | ▪ Assets |

- **Section 3 – Industry**

If somebody outside your industry, let’s say some third party vendors, are reading your documents, they must be aware of some of the common words used in IT:

- | | | |
|---------------|-------------------------|------------------|
| ▪ Lifecycle | ▪ Waterfall | ▪ Cloud |
| ▪ Environment | ▪ Responsive | ▪ QC |
| ▪ Agile | ▪ Business Intelligence | ▪ Cross-platform |

- **Section 4 – Organization**

Some terms hold their meaning only within an organization and are tied towards the company’s culture and policies. Examples include terms like Dev members, QC members, review procedures, HR policies, etc...

3. The glossary document can be expanded to include some additional sections that give more information about the terms, like:
 - ‘Alias’ is a word/phrase that can be used to substitute the primary term in the glossary. E.g., Dev can be used interchangeably with development, and staging can be mentioned in place UAT.

- **'Related Terms'** are words/phrases related to the primary term listed in the glossary but cannot be used interchangeably. For e.g. the words related to 'Stage' could be cycle, build, phase, and milestone.

And, that's it about creating the glossary document. Please refer to the simple glossary template available with this lesson.

We now advance towards the best practices to implement while creating a glossary.



GLOSSARY - BEST PRACTICES

1. A glossary is not a dictionary

For the sake of better understanding, one may call a glossary a project dictionary, but unlike an actual dictionary, a glossary contains one and only one definition against a term. This ensures consistent usage of project terminology and prevents the reader's understanding from going out of context.

Also, don't waste unnecessary time writing definitions like a linguistics professor! Your descriptions should be good enough to be able to express the intended meaning, and it's not worth your time making them very formal or precise.

2. Use your organizational knowledge base as a starting point of your glossary

I have already mentioned that you should always jump-start your glossary document by taking help from some existing documents. Some examples of such resources are:

- Glossary documents of previous projects in your organizations (the organizational knowledge base)
- Relevant excerpts from the 'glossary section' of the requirement documents belonging to the organization's previous projects
- A basic glossary defined by your organization as a part of its process and org templates (most of the organizations maintain such documents)
- A domain-specific glossary available as a resource over the internet

Following this practice, you will save a lot of time off your already occupied schedule while ensuring that your glossary is more thorough and comprehensive.

3. Prepare a glossary through collaboration

I know how hard it can be to decide what terms should go inside the standard glossary document, and I have found that the best way to do so is to follow a collaborative approach! - All you need to do is ask a fellow analyst (working on a different project) or a colleague to go through the document and just mark the words or terms they had a difficult time understanding.

And that's it. All you need is somebody who doesn't share the same project understanding as you.

Note – For projects containing sensitive information, you can ask your fellow team members who still haven't had a chance to look at the requirements. (All you need is a fresh pair of eyes on the document and the requirements contained).

4. Be creative while defining the terms

Suppose you are finding it hard to describe a project concept/component (this happens especially with the technical terms), and your definition is not able to do full justice to the same. Why don't you use a picture or image or an external link to the same (if one is available!).

"A picture is worth a thousand words". Remember?

5. Be consistent in the usage of your project terminologies

The very reason you are using a glossary is to make sure that everybody shares a mutual meaning of the project-specific terms, and not sticking to the same will be a guaranteed recipe of confusion!

So, that brings an end to this lesson, my fellow analyst. Make sure you check the templates available with this lesson.