



Documenting Business Terms

EBR User Guide # 2

Why we capture business terms

Business terms are the foundational elements of a business rule. To ensure business rules are understandable to business people, the business rules need to be documented using the vocabulary of the business. Understanding and capturing the business vocabulary is therefore the first step in writing good business rules. All business terms referred to in the business rules need to be defined to ensure consistent understanding of the business rules across the organisation.

How to identify, capture, and document business terms

Preferred business term

The business term being documented in the business terms glossary should always be the preferred business term across the organisation or an area of business. A preferred business term is the term that is the most accurate in describing the concept, and the most common or most used term when communicating the concept within the business.

However, in instances where the most common term in the business is inaccurate or does not describe a concept accurately enough, the preference is to capture the more accurate term as the preferred business term as opposed to the more common term. This approach allows for transforming the business into using more accurate business terms in its communication.

For example, at ACC, the term *client* is the preferred business term over the term *claimant* or *customer* to describe the concept of an injured person with a covered personal injury and receiving entitlements from ACC.

Synonyms

Synonyms are all the other terms used as variations of a preferred business term across the business (whether this usage is accurate or not). Synonyms are captured and linked to their preferred business terms. This builds a more accurate and complete business knowledge repository for the organisation. Acronyms and abbreviations are also types of synonym.

For example, the term *claimant* is not the preferred business term, but still a term used within the organisation's vocabulary and which needs to be understood in some contexts, will be captured as a synonym of the business term *client*.

Another example, the term ACC which is the acronym for *Accident Compensation Corporation*, will be captured as synonym of that term.

Homonyms

Homonyms are words which are spelled and/or even at times pronounced the same, however, they carry different meaning depending on context. An example of such words is 'mouth' (of a river), and 'mouth' (of an animal). The purpose of the business term glossary is to standardise meaning across the organisation. However, this may not be possible, therefore we need to capture homonyms as well.

The recommendation for capturing homonyms in business terms glossary is to use one of the following approaches.

1. Prefixing the business term with the context.

For example, the business term *service* may have multiple meanings in an airline business. The business term can be prefixed to provide additional context such as *meal service*, *customer service*, *maintenance service*. All prefixed business terms will be documented as a separate business term, sharing the synonym of the term being prefixed. In the example above, the synonym for each term would be 'service'.

2. In cases where prefixing does not work, the accepted approach is to provide disambiguating context by adding square brackets to the business terms.

For example, the business term *state* can be given context by adding brackets like *state [political]*, or *state [mood]*.

This disambiguating approach will also assist with resolving any conflicting use of business terms across the organisation, where the context of the business unit can be given in the brackets. For example, client [customer], or client [software].

Defining Business Terms

Only ACC specific business terms should be given a full definition. For non-ACC specific business terms, a business rules author should refer (cite) the definition of a business term to an accepted dictionary. This includes for specialised terminologies such clinical terms. This approach has been adopted to ensure the EBR glossary is not replicating a complete dictionary. Instead this allows the EBR glossary to be a single location for ACC internal definitions and for referencing non-ACC specific terms.

Before defining a business term, check the EBR glossary to see if the business term has already been defined.

Sourcing Definitions

There are two key principles that apply in defining a business term:

- A business term should be given the most logical definition for the term
- Definitions should only be sourced from authoritative sources

The preferred authoritative sources are (in order):

1. An existing and approved internal business glossary
2. Relevant legislation (for terms derived from legislation)
3. A business decision made by the business term owner, via a subject matter expert and/or procedural documentation (for business terms with a specific and non-standard meaning)

For example, *registered vendor*, which means something specific to the Provider business unit of ACC

4. Specialised dictionary (for industry specific terms, such as clinical terminology)
5. A general dictionary (for common/standard business terms which have no specific meaning within the organisation, for example *motor vehicle*).

If you are unsure whether an existing glossary or potential definition source is approved, then refer to it while getting the definition reviewed and approved by the business term owner. If the glossary or source is not approved, the source will be a business decision made by the business term owner.

Accepted Dictionaries

Ideally there will only be one accepted dictionary used to source standard definitions across an organisation. Where non-standard definitions are required (for example industry or clinically specialised terms), the principle is still to refer to the minimum required range of sources to ensure consistency.

Accepted General Dictionary

For capturing definitions of business terms at ACC (as well as ratifying grammar, usage, or synonyms) the Oxford English Dictionary (OED) should be used as a reference. Without a paid subscription or a print version of the dictionary, the easiest way to access OED content is through their free portal at <https://www.lexico.com>

Accepted Medical/Clinical Dictionary

The ACC Clinical team recommend the MedlinePlus dictionary from Merriam-Webster at <http://c.merriam-webster.com/medlineplus/>

Using business subject matter experts and procedural documentation as sources

The understanding of the context for a business term should be gathered from procedural documentation and interviews with subject matter experts, however, these should not be used in the first instance as the authoritative source for a definition.

As indicated above, business subject matter expert and/or procedural documentation should only be used as a definition source in circumstances where the business term is not defined anywhere else in the business and a standard dictionary definition does not provide an accurate representation of the concept.

Key principles in defining business terms

1. A business term should always be a noun or a compound-noun.
2. A definition should be concise.
If the definition is extremely long, or requires multiple complex clauses, or exceptions or other conditions, consider using a business rule (definition rule) to capture the details.
3. A business term should always be singular.
4. A definition always expresses the essence of the concept, not its purpose, function, or use.

At ACC we follow widely accepted business rules methodology and apply industry standards such as RuleSpeak, ConceptSpeak and TableSpeak. Refer to the primer "[How to define business terms in Plain English](#)" produced by Business Rule Solutions for additional guidance on these standards (particularly ConceptSpeak) as applied to business term definitions. (If this hyperlink is not available or out of date, please search Te Pātaka for the document title).

Linking with the Concept Model

All business terms captured should also be in your concept model. The creation of the concept model should occur before or simultaneously with the capturing of the business terms. The concept model gives all stakeholders a central point of reference for reference for the meaning and relationship between the terms being defined.

Refer to the Concept Model User Guide (EBR User Guide # 3 – search Te Pātaka) for more information on creating a concept model.

The concept model is a living document that can be expanded and refined as the understanding meanings and relationships between terms evolves.

Approving Business Terms

Refer to the Business Rules and Terms Approval matrix to guide you to the appropriate approver of a business term.

Business Term Ownership Model

All documented and approved business terms must have an owner assigned to the term. The default business term owner is the business unit or group that, by its business function, most commonly applies or use the business term in its everyday business processes. This is the unit that determines the meaning of the business term across the organisation.

Publishing and Re-using Business Terms

All approved business terms will be published on the Business Rules Portal along with the business rules. This is a searchable glossary that people across the organisation can use to find business terms.

The responsibility for publishing and managing the published business terms in the glossary is on the Enterprise Business Rules Centre of Expertise.

The Business Rules Portal should be the first port of call to see what business terms in the area of interest have already been captured and approved. Training and guidance on searching the portal and exporting results for analysis is available from the [Enterprise Business Rules](#) and [Documenting Business Rules](#) locations on Te Pātaka.