Lucid™
Technologies & Solutions

Business Term Approval Workflow Deployment Documentation

Application Version History

Application Version	Released On	Released By	Approved By
1.0	02-09-2020	N. Padma Gokul	

Contents

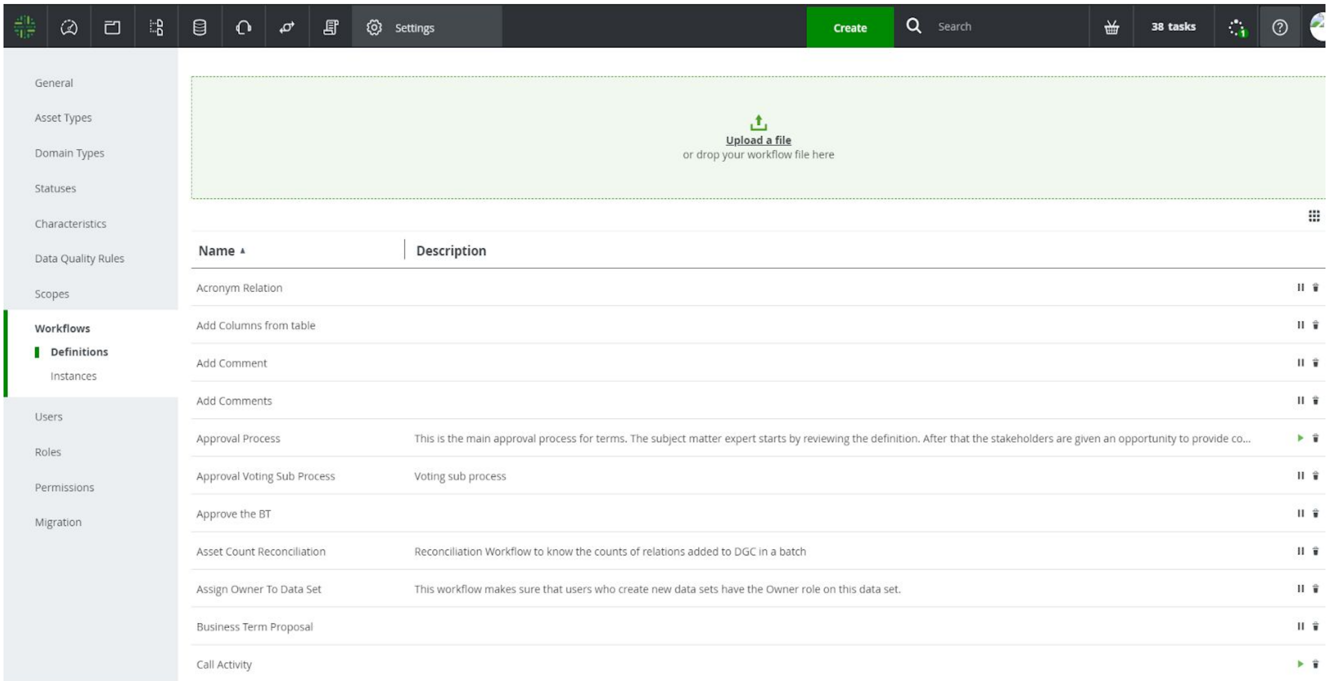
1. Overview

This document lists the steps involved in deploying & configuring the following workflows

- Propose Business Term Workflow
- Custom Approval Process Workflow
- Approval Voting Sub Process Workflow

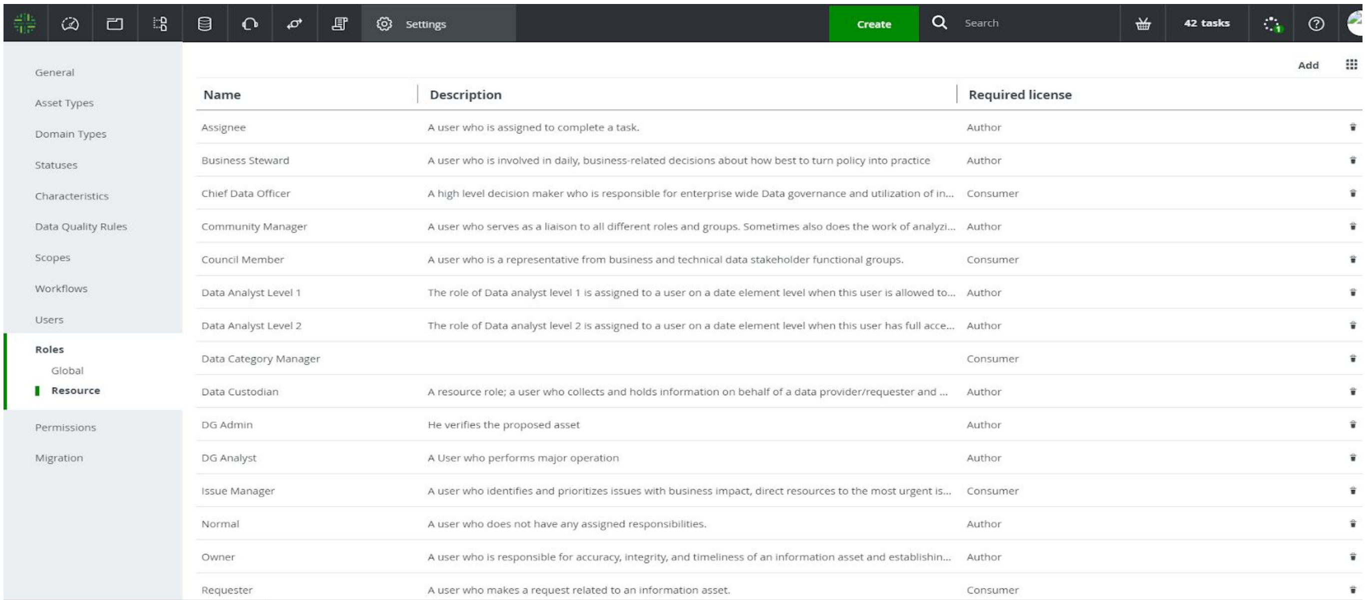
2. Workflow Deployment

- Login to Collibra DGC.
- Navigate to “Settings -> Workflows” and click on upload workflow.
- In the package folder, go to “Business Term Approval Workflow -> Workflow -> Business Term Approval -> src -> bpmn” and select the bpmn files one by one and click upload.
- The bpmn files will be uploaded to the DGC.

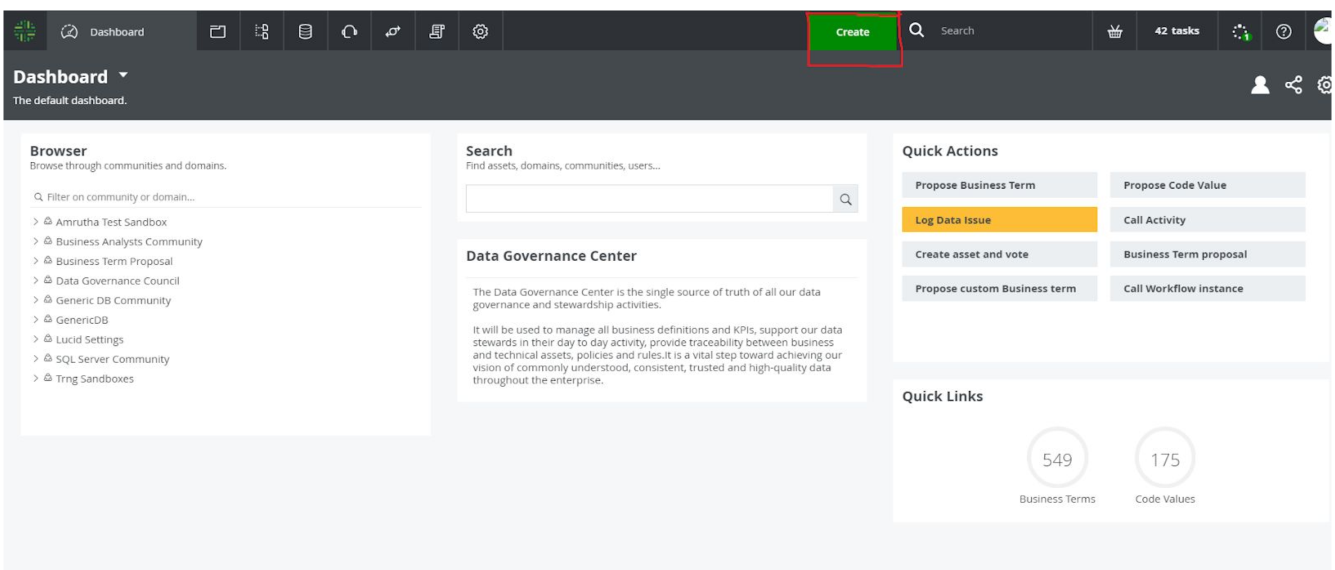


3. Configuration

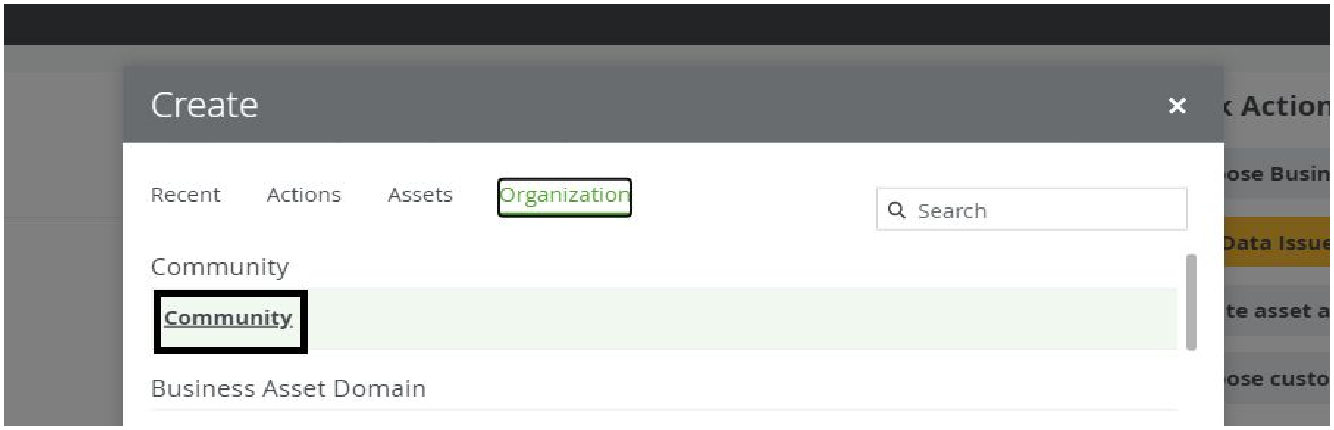
- Now scroll down the workflow page and enable “Propose Business Term Workflow”, “Custom Approval Workflow” and “Approval Voting Sub Process” by clicking on the play button  adjacent to it.
- Now go to “Settings -> Roles -> Resources” and click on the “Add” button.



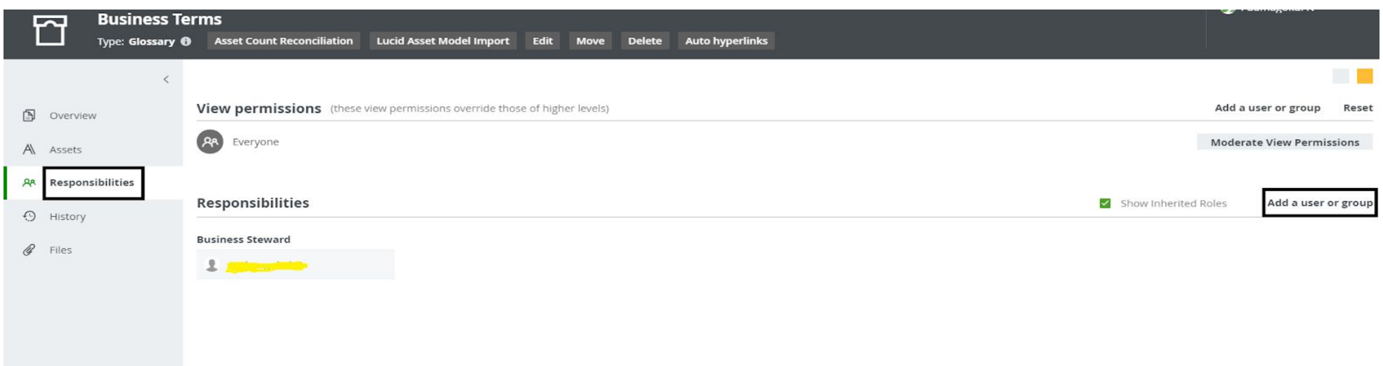
- Create roles named “DG Admin”, “DG Analyst” and “Technical Steward” one by one with description as optional.
- Now click on the “Dashboard” icon and in the dashboard, click on the “Create” button.



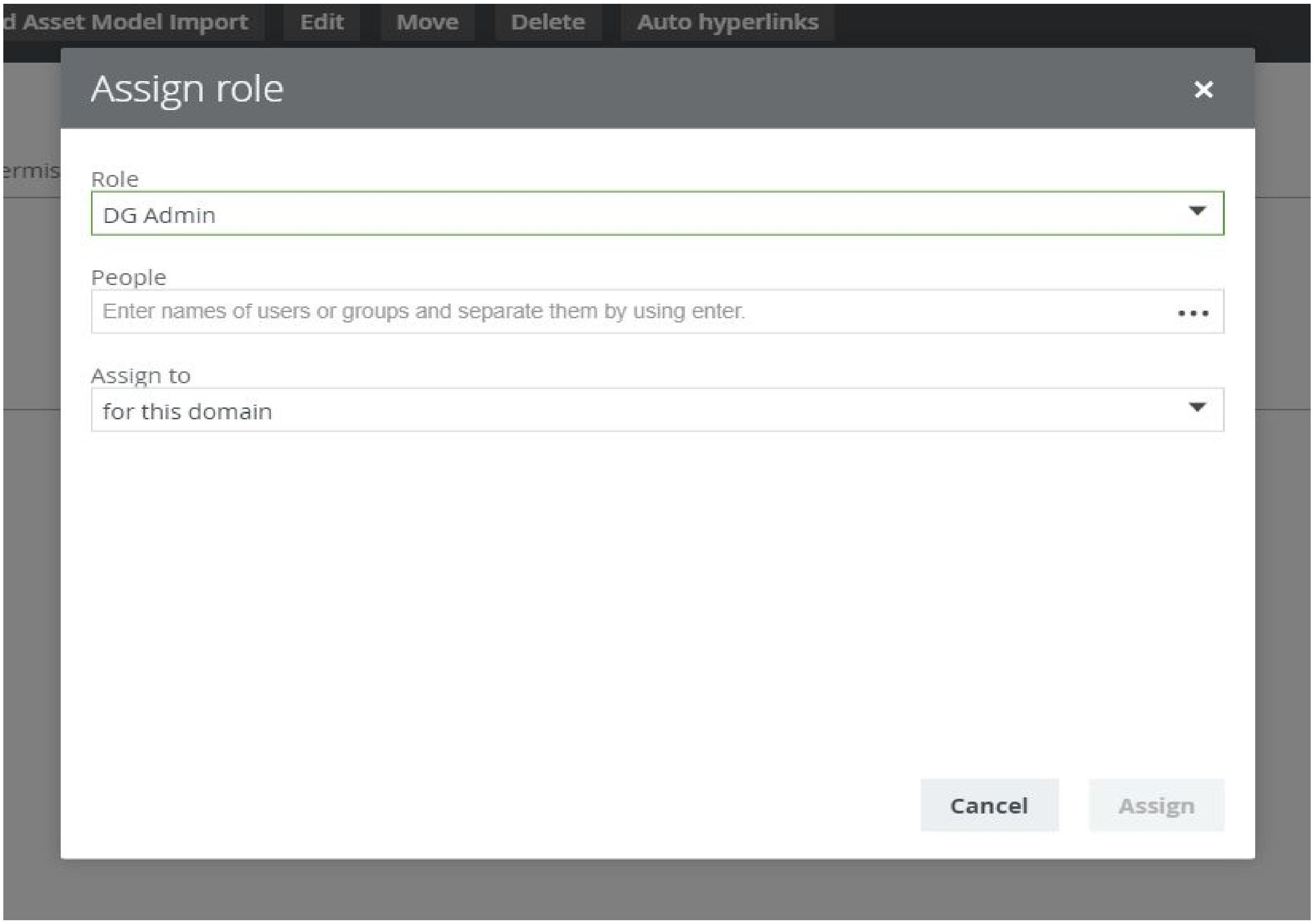
- Go to “Organization” and select community. Name the community of your choice.



- Now again click on the “Create” button and go to “Organization” and search for “Glossary”. Name the domain of your choice and for the “Community” field select the newly created community. This domain will house the proposed business term temporarily before approval.
- To assign responsible users for the domain, search for the required domain and select it. Then go to the responsibility section in the left hand side and click “add a user or group”.



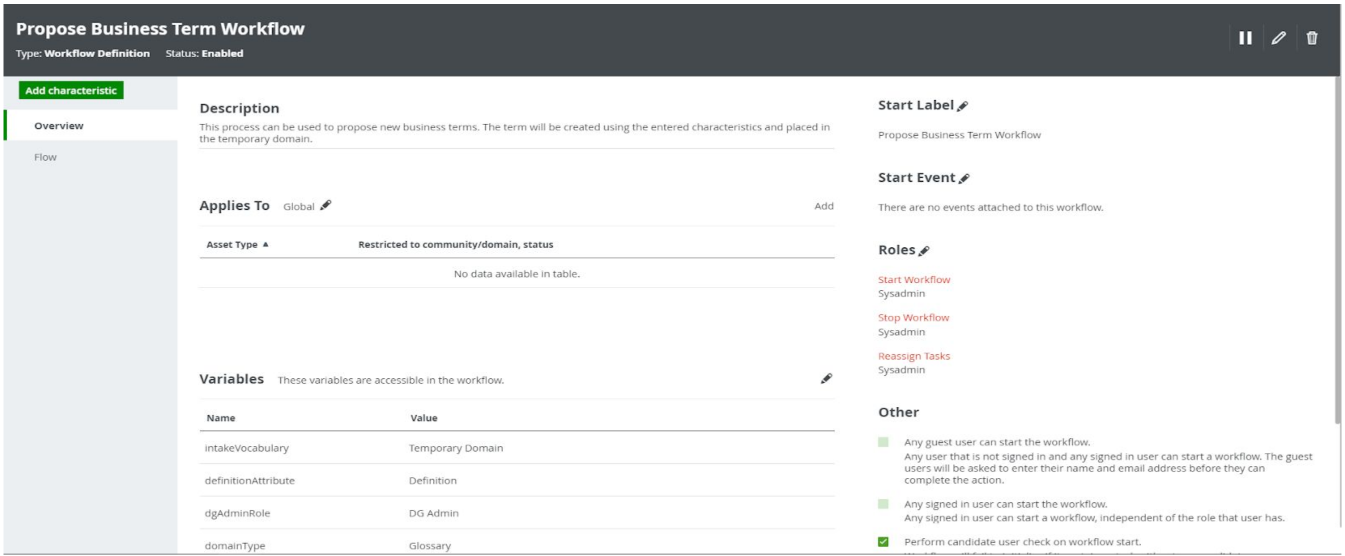
- For the role select “DG Admin” and for “people”, select the required users for the role and click ok.



- Repeat the process for all the other roles and for any newly created Glossary Domains.

3.1 Business Term Proposal Workflow

- Now go to “Settings -> Workflow” and select “Propose Business Term Workflow”. In the “Workflow Variables” section, select the “Pencil” icon and in the field “Intake Vocabulary” enter the name of the temporary domain created.

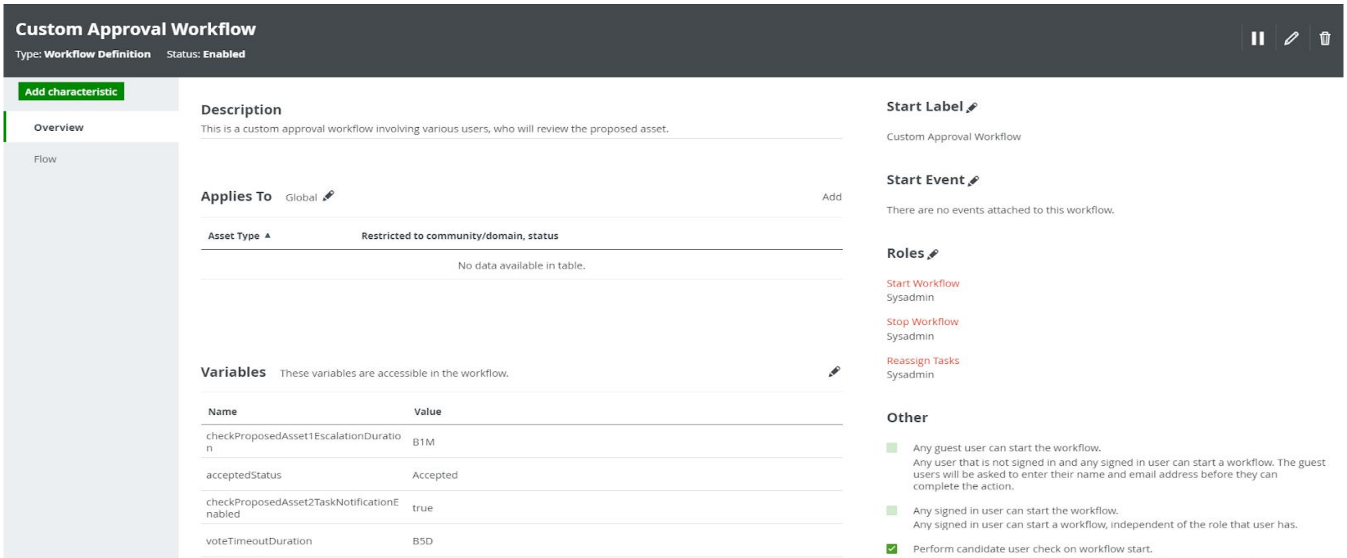


Workflow Variables:

S. No	Variable	Out of The Box (OOTB) / Custom	Default	Description
1	Domain where the asset is created	Custom	Temporary Domain	The domain name where the proposed asset is created
2	Definition Attribute	Custom	Definition	Definition attribute name, which is used to show the definition given by proposer in the asset
3	Note Attribute	Custom	Note	Definition attribute name, which is used to show the definition given by proposer in the asset

4	Type of Asset	Custom	Business Term	Type of asset to be created
5	Name of the workflow to be called	Custom	customApprovalWorkflow	Process Id of the workflow to be called (Do not modify this)
6	Domain Type	Custom	Glossary	Domain type for fetching the responsible user from the domain(Do not modify this)
7	DG Admin	Custom	DG Admin	Role name for assigning task to the user (Do not modify this)

3.2 Business Term Approval Workflow



Workflow Variables:

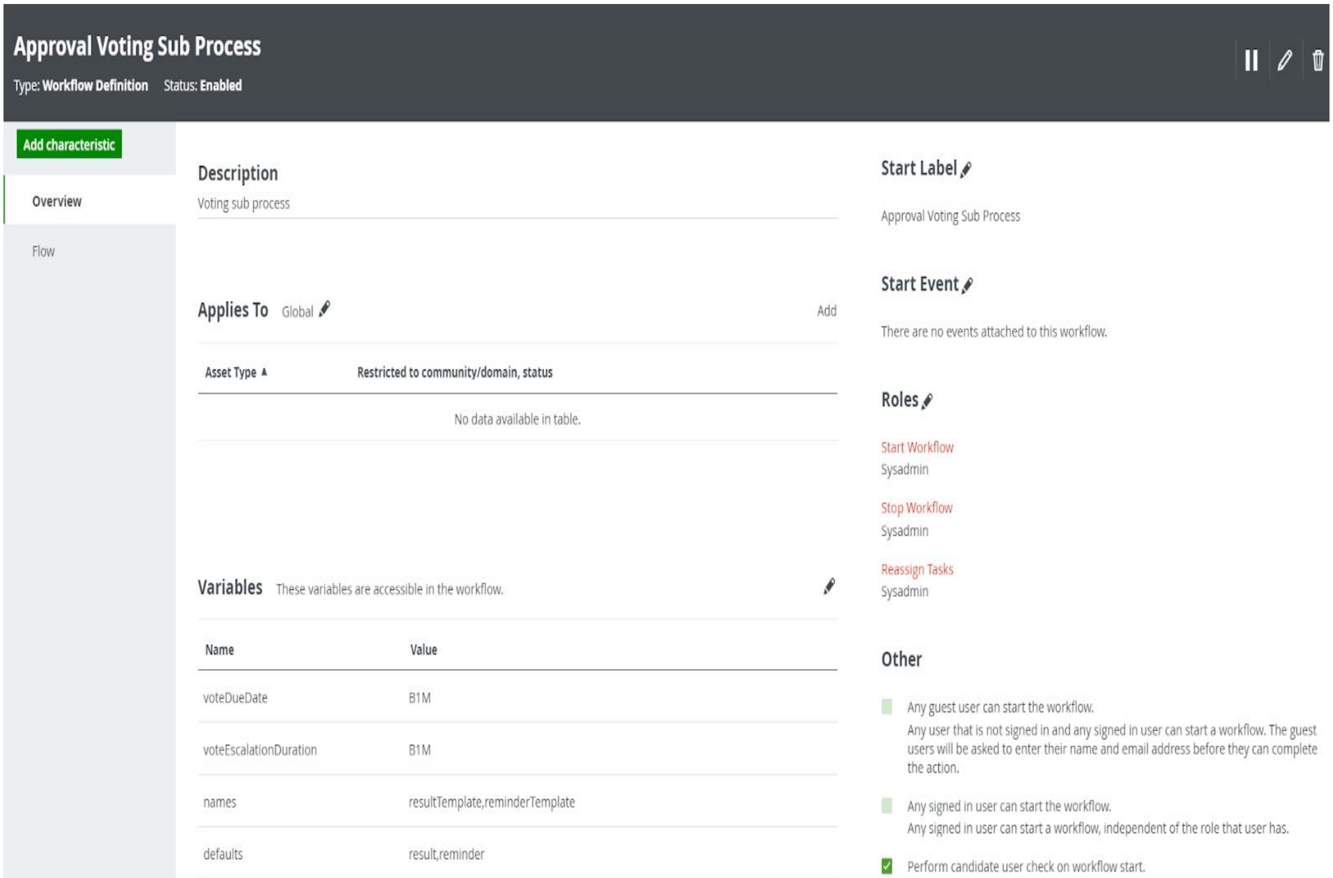
S. No	Variable	Out of The Box (OOTB) / Custom	Default	Description
1	Under Review Status	Custom	Under Review	Status of the asset to be set after proposal.
2	Asset ID	Custom	outputCreatedTermId	Asset Id of the proposed asset.(Do not modify this)
3	Accepted Status	Custom	Accepted	Status of the asset to be set after approval.

4	Rejected Status	Custom	Rejected	Status of the asset to be set after rejection.
5	Acronym Relation	Custom	has acronym	Relation name to relate an asset to an acronym
6	Column Relation	Custom	is part of	Relation name to relate an asset to a column
7	Represents Relation	Custom	represents	Relation name to relate an table to a column
8	Acronym Relation Source Type	Custom	Business Asset	Relation head name to get the relation ID
9	Acronym Relation Target Type	Custom	Acronym	Relation tail name to get the relation ID
10	Column Source Type	Custom	Column	Relation head name to get the relation ID
11	Technical Steward	Custom	Technical Steward	Role name for assigning task to the user (Do not modify this)

12	Business Steward	Custom	Business Steward	Role name for assigning task to the user (Do not modify this)
13	Vote Completion Percentage	Custom	100	Minimum percentage of vote required to complete the voting process. You can modify this to your choice.
14	Acronym Concept Type	Custom	Acronym	For suggesting only acronyms when selecting acronym relation to add(Do not modify this)
15	Table Concept Type	Custom	Table	For suggesting only tables when selecting table relation to add(Do not modify this)
16	DG Analyst	Custom	Technical Steward	Role name for assigning task to the user (Do not modify this)
17	Vote Completion time	Custom	B5D	Deadline for business stewards to complete the vote

- Vote Completion time - This specifies the deadline for business stewards to complete the vote. The default is B5D(5 Business Days). It can be modified in the workflow variables.

3.2 Approval Voting Sub-Process



Workflow Variables:

S. No	Variable	Out of The Box (OOTB) / Custom	Default	Description
1	Time duration before a warning mail is send to vote	Custom	B3D	Deadline for business stewards before a warning mail is sent

2	Time duration before the voting is stopped and the process continued	Custom	B5D	Deadline for business stewards before the vote is completed

4. Settings

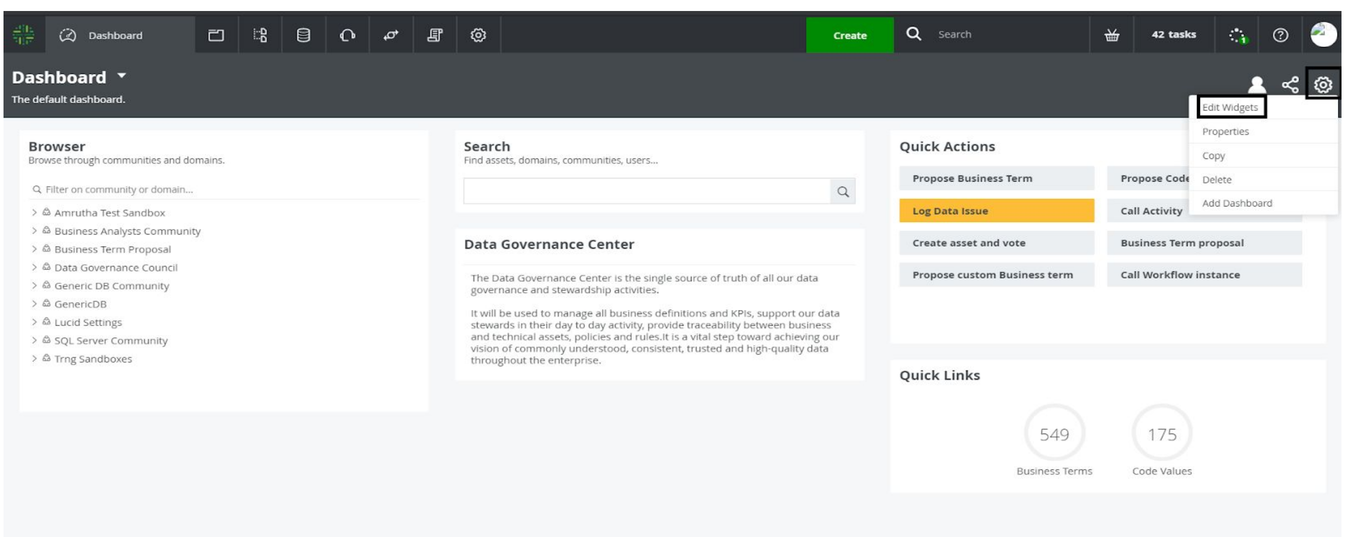
4.1 Dashboard Settings

The following Workflows must be configured in the dashboard:

- Propose Business Term Workflow

To configure the Workflows in the dashboard, follow the steps below:

1. Click on Dashboard -> Settings -> Edit Widgets



2. Click on the Configure icon under Quick Actions. Click on Add Button. Enter the name of the button as "Propose Business Term" in the first box and select the required workflow "Propose Business Term Workflow" in the second box. Click on the Save button.