

# **DSIRE Help Guide**

## Application Version History

Application Version	Released On	Released By	Approved By
1.0	04-09-2020	N. Padma Gokul	

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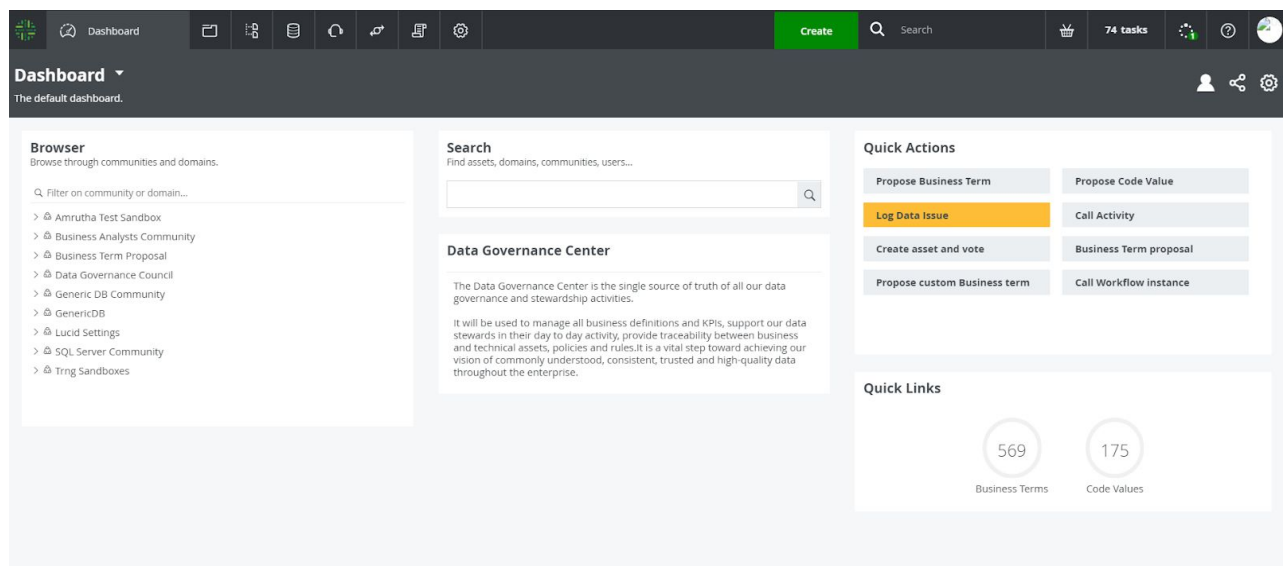
# 1.Introduction

This document provides step by step information on using the workflow.

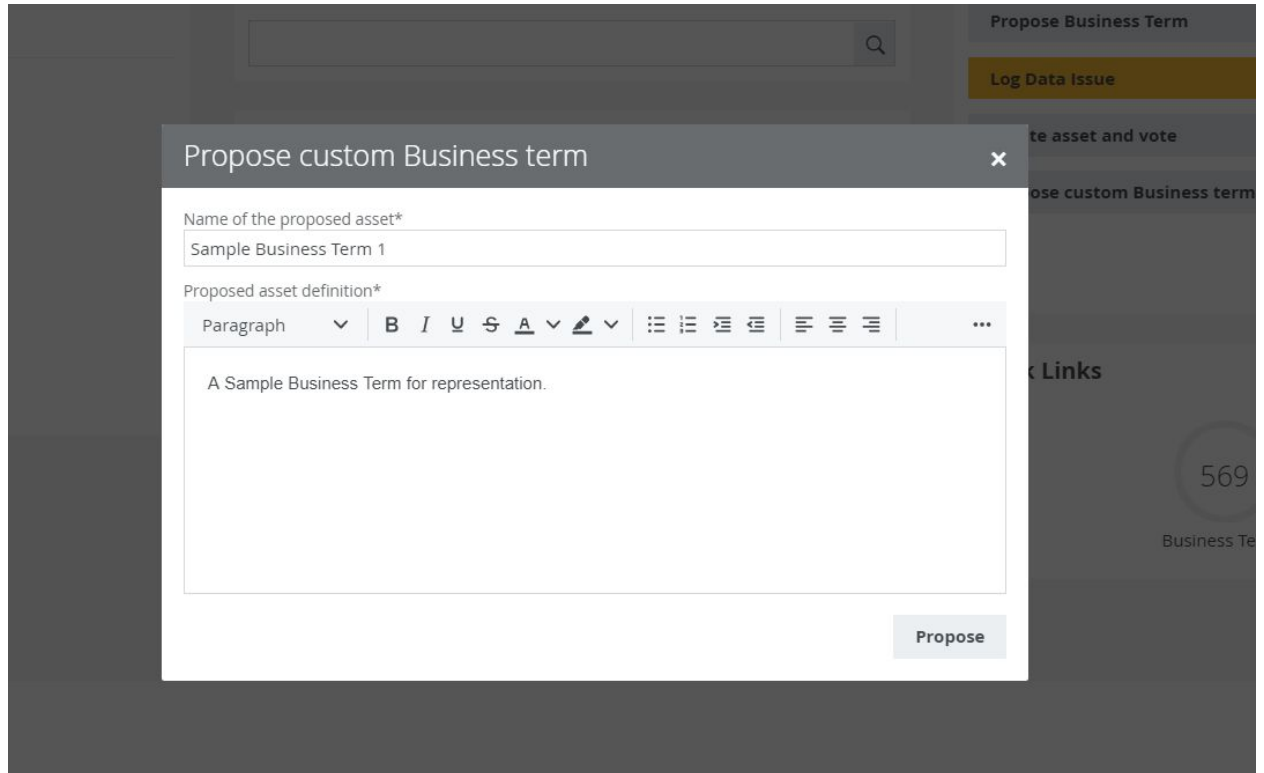
## 2.Help Guide

### 2.1 Business Term Proposal

1. Go to Collibra DGC dashboard and click on the button which you configured the proposal workflow with. A form will appear.

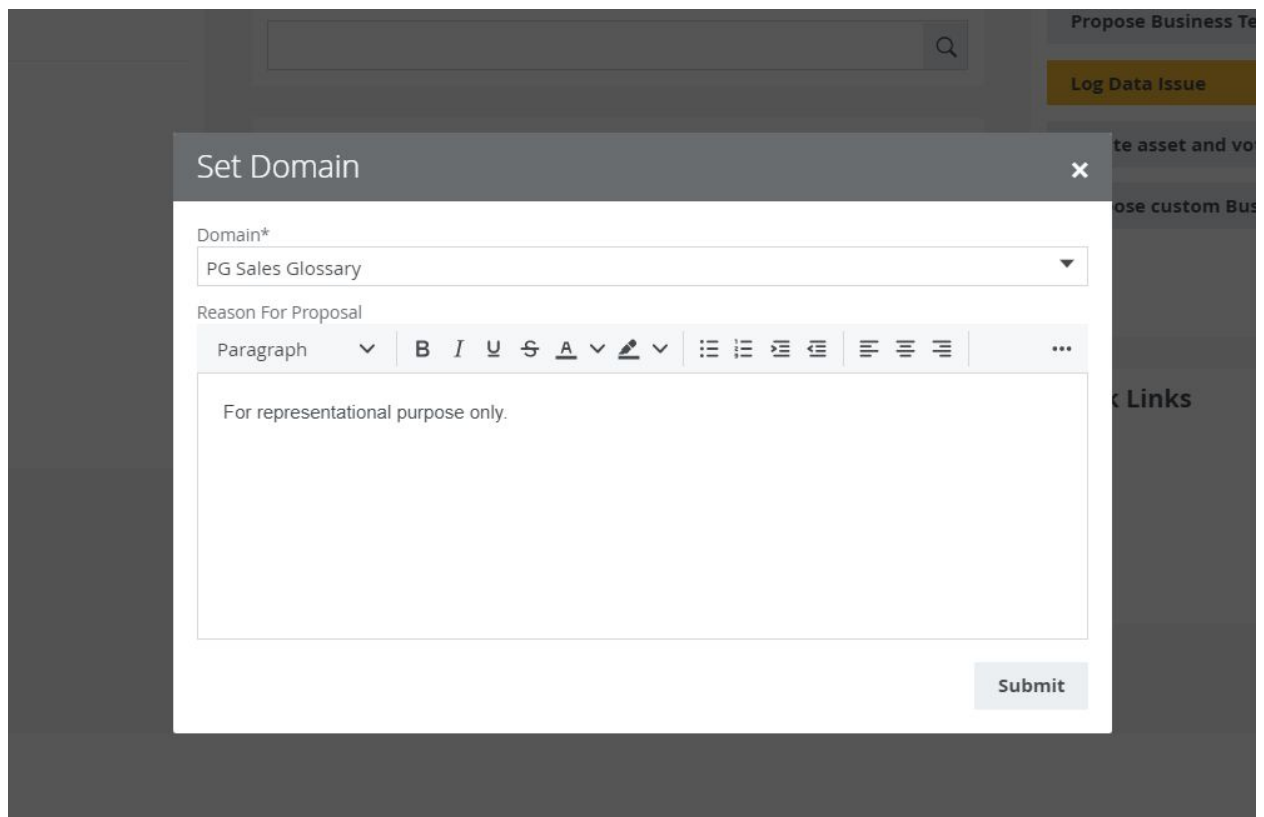


2. Fill in the required fields which are marked with star symbol “ \* ”. Click on “Propose” button. Another form appears.



The screenshot shows a modal dialog titled "Propose custom Business term" with a close button (X) in the top right corner. The dialog contains two main input fields. The first is labeled "Name of the proposed asset\*" and contains the text "Sample Business Term 1". The second is labeled "Proposed asset definition\*" and contains the text "A Sample Business Term for representation..". Above this second field is a rich text editor toolbar with options for Paragraph, Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Text Color (A), Background Color (background), Bulleted List, Numbered List, Indent Left, Indent Right, Decrease Indent, Increase Indent, and a More options menu (three dots). A "Propose" button is located at the bottom right of the dialog.

3. Fill in the domain where the business term need to be created and click on "Submit" button.

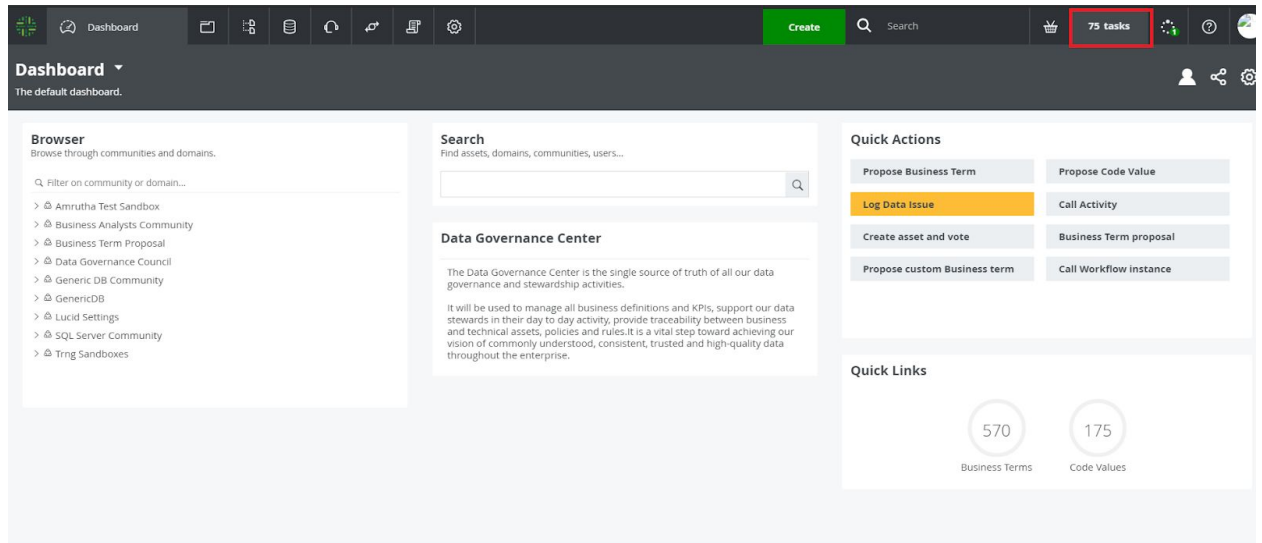


The screenshot shows a modal dialog titled "Set Domain" with a close button (X) in the top right corner. The dialog contains two main input fields. The first is labeled "Domain\*" and is a dropdown menu currently showing "PG Sales Glossary". The second is labeled "Reason For Proposal" and contains the text "For representational purpose only.". Above this second field is a rich text editor toolbar with options for Paragraph, Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Text Color (A), Background Color (background), Bulleted List, Numbered List, Indent Left, Indent Right, Decrease Indent, Increase Indent, and a More options menu (three dots). A "Submit" button is located at the bottom right of the dialog.

4. A business term will be created in the temporary domain and a task will be assigned to the DG Admins.

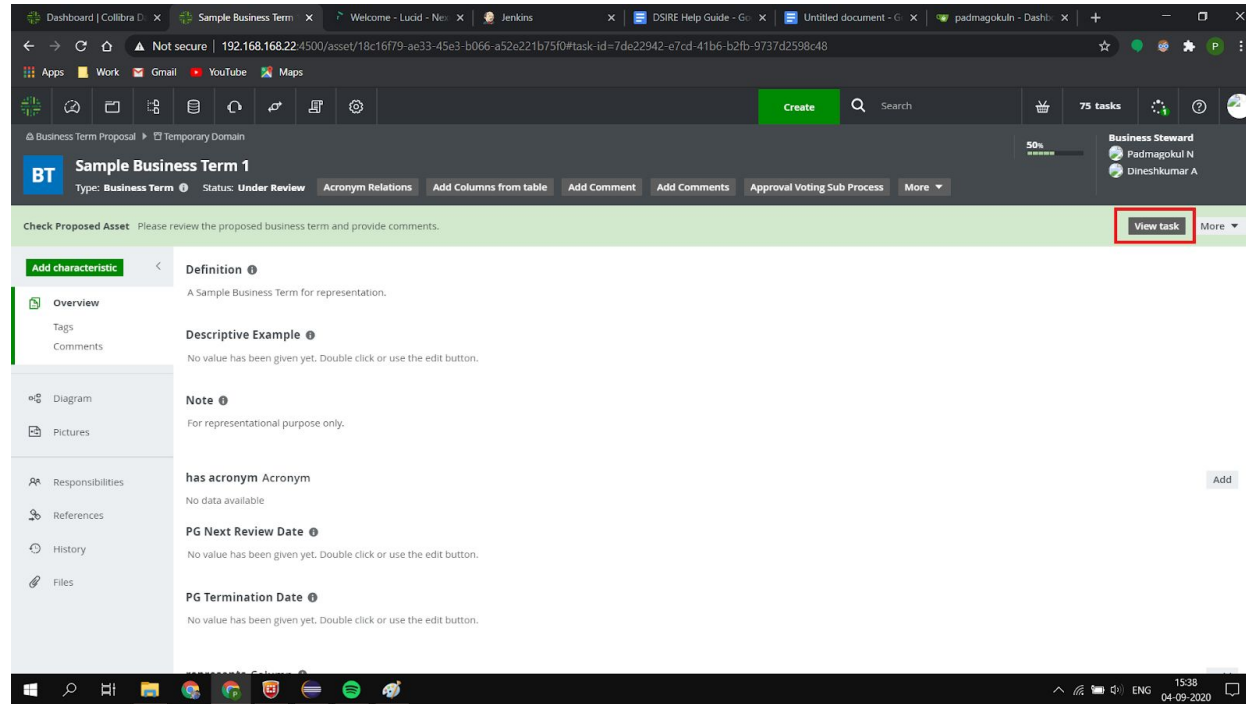
## 2.2 Business Term Approval

1. At first the status of the business term changes to “Under Review” and a task is assigned to the DG Admin. To view the task, go to the DGC Dashboard and click on Tasks on top right corner.



2. Click on “Check Proposed Asset”, the asset page opens. Click on “View Tasks”.

Check Proposed Asset	lksad	10/5/2020
<a href="#">Check Proposed Asset</a>	Sample Business Term 1	10/5/2020
Check Proposed Asset	ewtrete	10/5/2020



Dashboard | Collibra | Sample Business Term | Welcome - Lucid - New | Jenkins | DSIRE Help Guide - Google | Untitled document - Google | padmagokuln - Dashboard

Not secure | 192.168.168.22:4500/asset/18c16f79-ae33-45e3-b066-a52e221b75f0#task-id=7de22942-e7cd-41b6-b2fb-9737d2598c48

Apps | Work | Gmail | YouTube | Maps

Create | Search | 75 tasks | Business Steward: Padmagokul N, Dineshkumar A

Business Term Proposal | Temporary Domain

**BT Sample Business Term 1**  
Type: Business Term | Status: Under Review | Acronym Relations | Add Columns from table | Add Comment | Add Comments | Approval Voting Sub Process | More

Check Proposed Asset Please review the proposed business term and provide comments. **View Task** More

**Add characteristic** < Definition ⓘ  
A Sample Business Term for representation.

**Overview**  
Tags  
Comments

**Diagram**  
Pictures

**Responsibilities**  
References

**History**  
Files

**Descriptive Example ⓘ**  
No value has been given yet. Double click or use the edit button.

**Note ⓘ**  
For representational purpose only.

**has acronym Acronym**  
No data available

**PG Next Review Date ⓘ**  
No value has been given yet. Double click or use the edit button.

**PG Termination Date ⓘ**  
No value has been given yet. Double click or use the edit button.

Windows taskbar: 15:38 04-09-2020





















3. A form appears and the values inputted by the proposer is displayed as read-only. Scroll down to add the comments or change the domain if required and click “Approve” or “Reject” button. This task can be completed by any one of the DG Admin. If the DG Admin did not add the comment and click on “Approve” or “Reject” button, then an exception will pop up saying to add comment.
4. After adding the comments, if the Admin accepts the asset, then another task will be assigned to DG Analyst. If rejected, then the status of asset changes to rejected and the process stops.

as term and provide comments.

### Check Proposed Asset

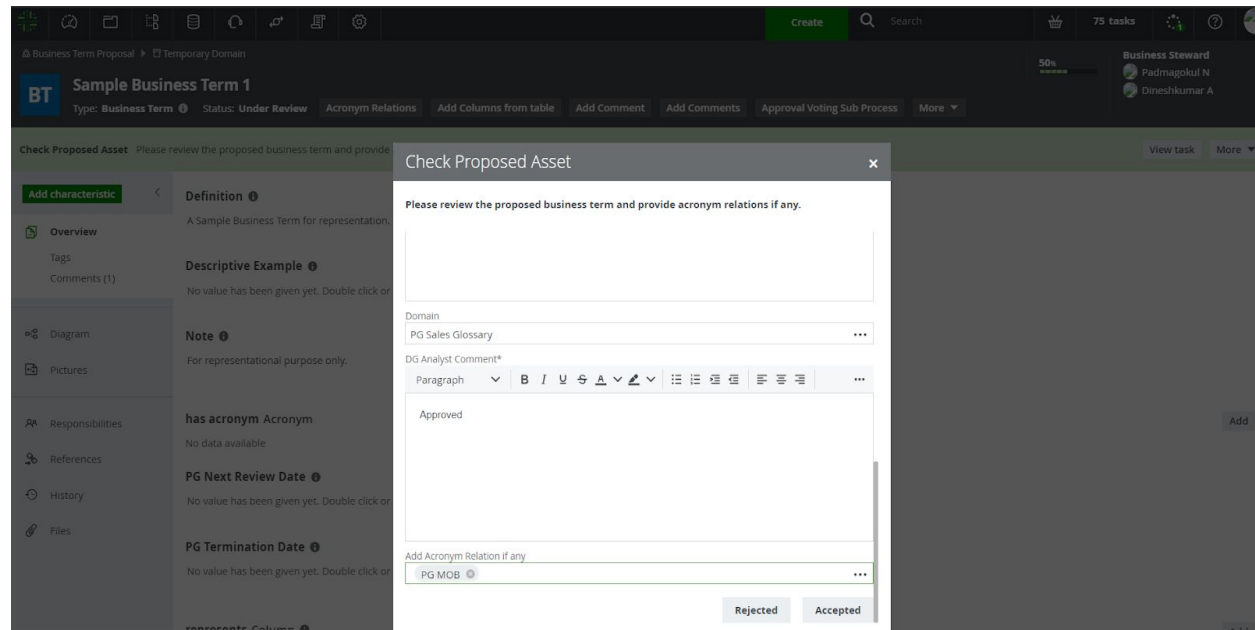
Please review the proposed business term and provide comments.

Name  
Sample Business Term 1

Definition  
Paragraph **B** *I* U ~~S~~ **A**                       

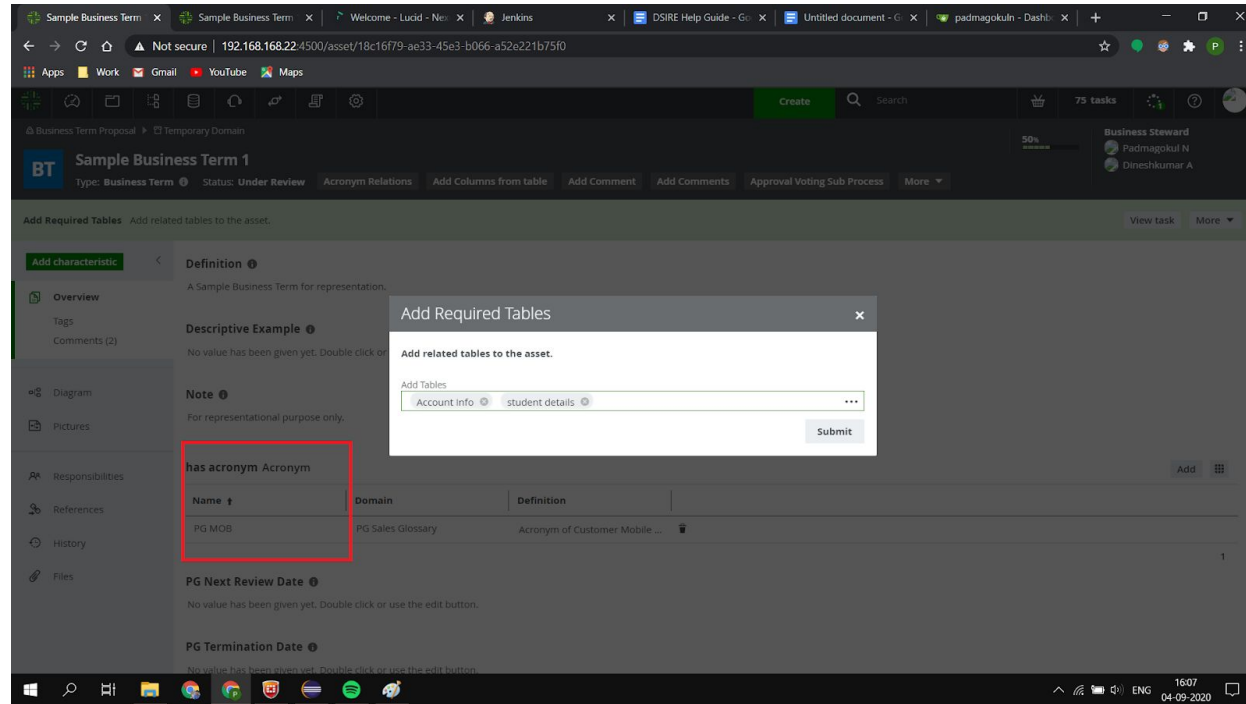


5. The DG Analyst now receives a task and he can access it the same way as DG Admin.
6. A form appears and the values inputted by the proposer and comments by DG Admin is displayed as read-only. Scroll down to add the comments or change domain and acronym to add if present.

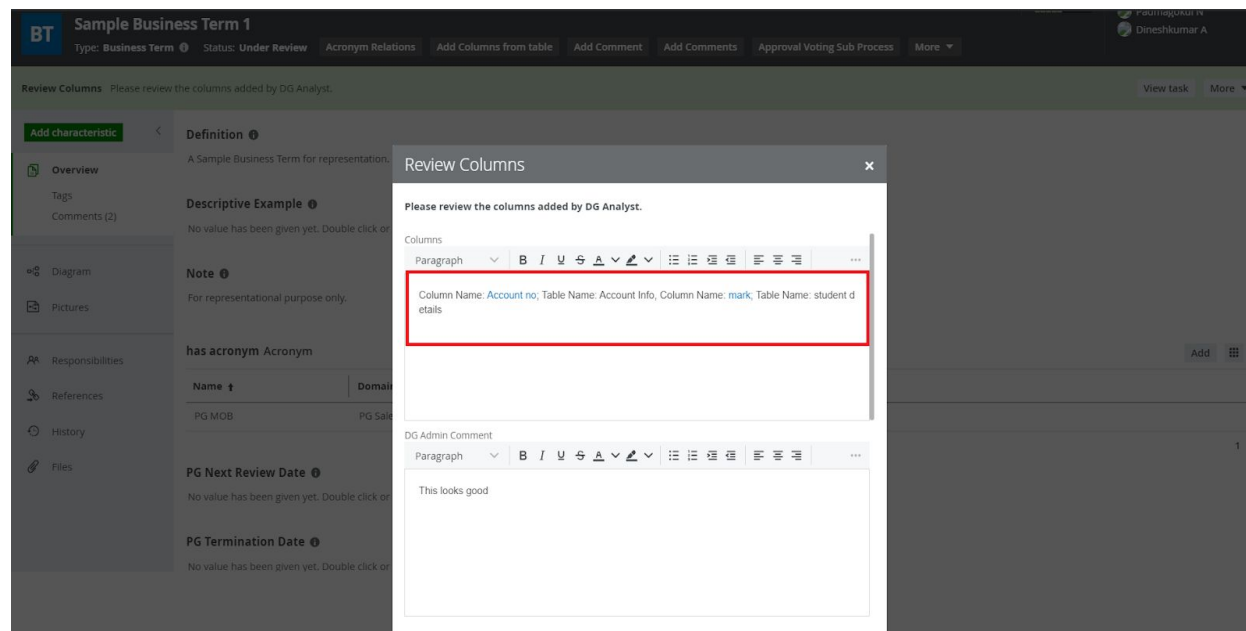


The screenshot displays the 'Check Proposed Asset' modal form within the Lucid software interface. The background shows a sidebar with navigation options like 'Overview', 'Tags', 'Comments (1)', 'Diagram', 'Pictures', 'Responsibilities', 'References', 'History', and 'Files'. The main content area is titled 'Sample Business Term 1' and includes sections for 'Definition', 'Descriptive Example', 'Note', 'has acronym Acronym', 'PG Next Review Date', and 'PG Termination Date'. The modal form itself has a title bar 'Check Proposed Asset' and a close button. It contains a text area for 'Please review the proposed business term and provide acronym relations if any.', a 'Domain' dropdown menu with 'PG Sales Glossary' selected, a 'DG Analyst Comment\*' text area with 'Approved' entered, and an 'Add Acronym Relation if any' section with 'PG MOB' selected. At the bottom of the modal are 'Rejected' and 'Accepted' buttons.

7. After adding the comments, if the Admin accepts the asset, then another task will be assigned to DG Analyst asking them to select tables to add their column to the asset. If rejected, then the task moves back to DG Admin for rechecking.
8. If the acronym is added, it will be reflected in the business term page in “has acronym” section.



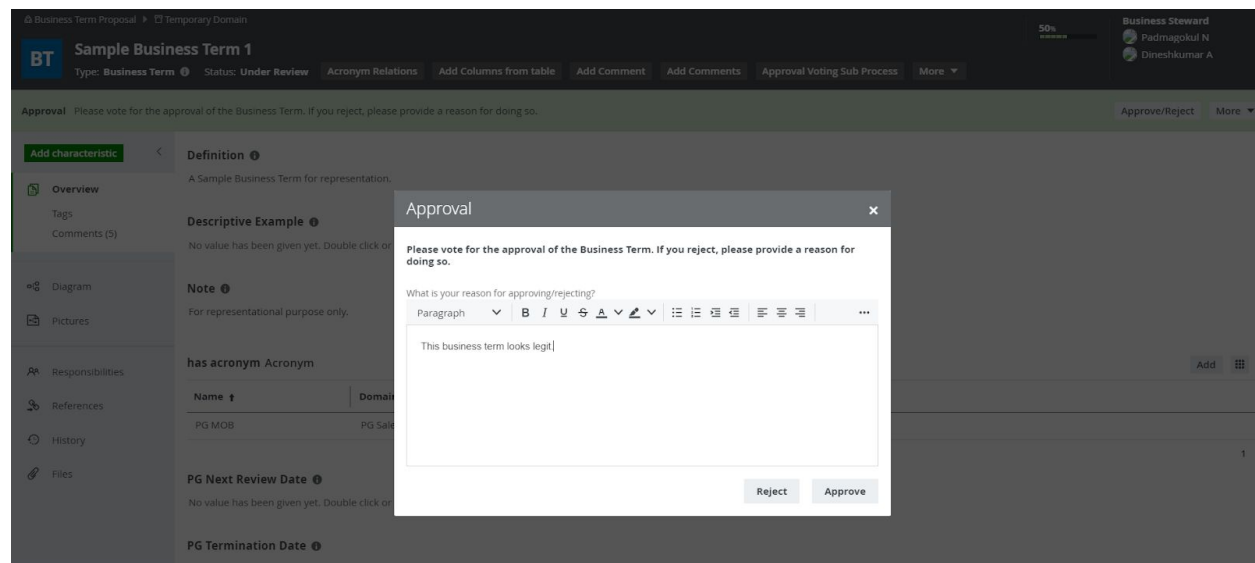
9. After selecting the table, all the columns from the table will be displayed to the Analyst in the next form when the column field is selected.
10. Select the required columns to add from the list. Press submit button.
11. Now another task is assigned to the technical steward asking them to review the selected columns.
12. The Technical Steward now receives a task and he can access it the same way as others.



13. They receive a form with the columns added by DG Admin with hyperlink to the column and all the comments by previous users.
14. If the technical steward rejects the proposal, then the process goes back to DG Analyst for recheck.  
**Note: After the recheck by DG Analyst, before accepting the asset make sure to remove the Acronym if it was the same one that was added previously to avoid errors. This also applies to the “Select Columns” form. You can add new acronym or column though.**
15. If the Technical Steward accepts the business term, voting process starts and the task moves to Business Stewards.

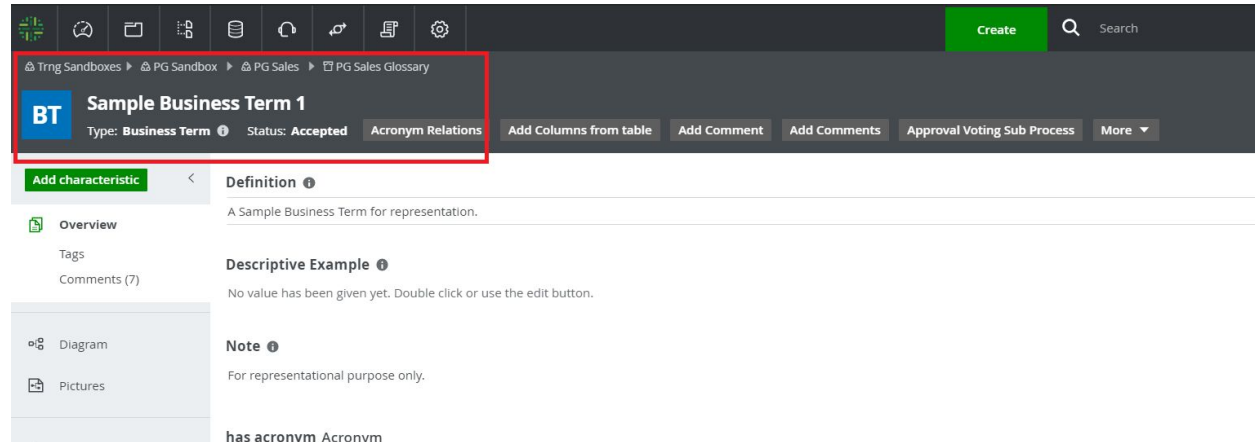
## 2.3 Voting Process

1. The Business Steward now receives a task and he can access it the same way as others.

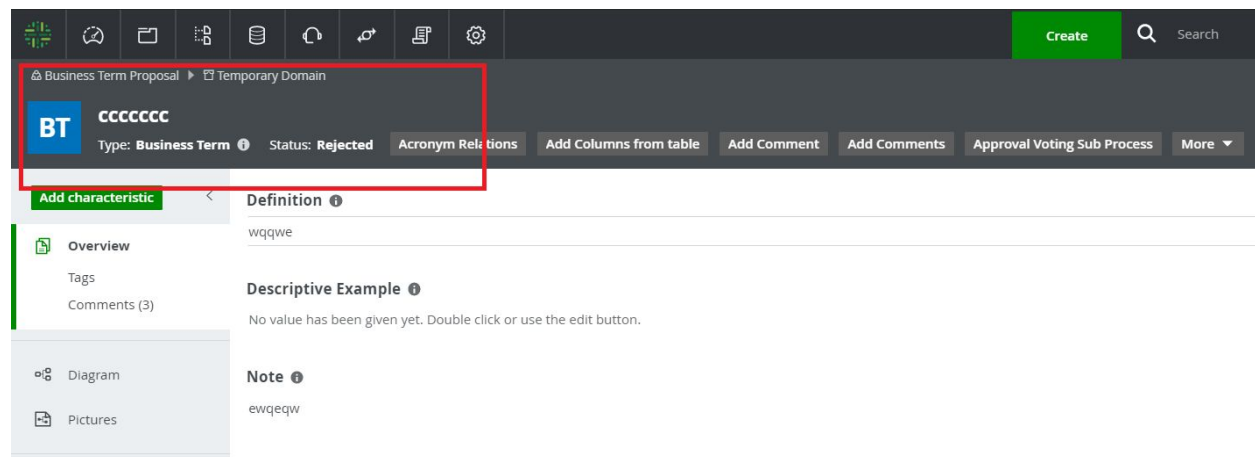


The screenshot displays the 'Sample Business Term 1' interface. The top navigation bar includes tabs for 'Definition', 'Descriptive Example', 'Note', 'has acronym Acronym', 'PG Next Review Date', and 'PG Termination Date'. The 'Definition' tab is active, showing a text area for the definition and a table for the acronym. An 'Approval' modal is open, prompting the user to vote for the approval of the Business Term. The modal includes a text area for the reason for approving/rejecting, a 'Paragraph' dropdown, and 'Reject' and 'Approve' buttons. The background interface shows a sidebar with navigation options like 'Overview', 'Tags', 'Comments', 'Diagram', 'Pictures', 'Responsibilities', 'References', 'History', and 'Files'.

2. They can state the reason to accept or reject the business term. Based on the vote percentage, the business term gets approved or rejected.
3. If the business term gets approved, the status of the business term changes to “Accepted” and the business term moves to the domain last specified by DG Analyst.



4. If rejected, then the status changes to “Rejected” and the business term stays in Temporary Domain.



5. It is possible to view all comments made by the approvers by going to asset page and scrolling to “Comments” section.

Trng SandboxesPG SandboxPG SalesPG Sales Glossary

BT

Sample Business Term 1

Type: Business TermStatus: AcceptedAcronym RelationsAdd Columns from TableAdd CommentAdd CommentsApproval Voting Sub ProcessMore

100%

Business Steward

Padmagokul N

Dineshkumar A

Add characteristic

OverviewTagsComments (7)

DiagramPicturesResponsibilitiesReferencesHistoryFiles

No value has been given yet. Double click or use the edit button.

Comments

Write a comment...

Dineshkumar A

it was approved by Gokul, so it must be legit.

4 minutes ago

Padmagokul N

This looks legit

4 minutes ago

Padmagokul N

Accepted

21 minutes ago

Padmagokul N

Approved

22 minutes ago

Padmagokul N

Not accepted

24 minutes ago

Padmagokul N

Approved

37 minutes ago