



erwin Data Intelligence Suite

Workflow Management Guide

Release v10.2

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Managing Workflows

The Workflow Manager enables you to manage and create automated workflows to perform a task in Business Glossary Manager, Metadata Manager, and Mapping Manager. It also provides workflow execution insight.

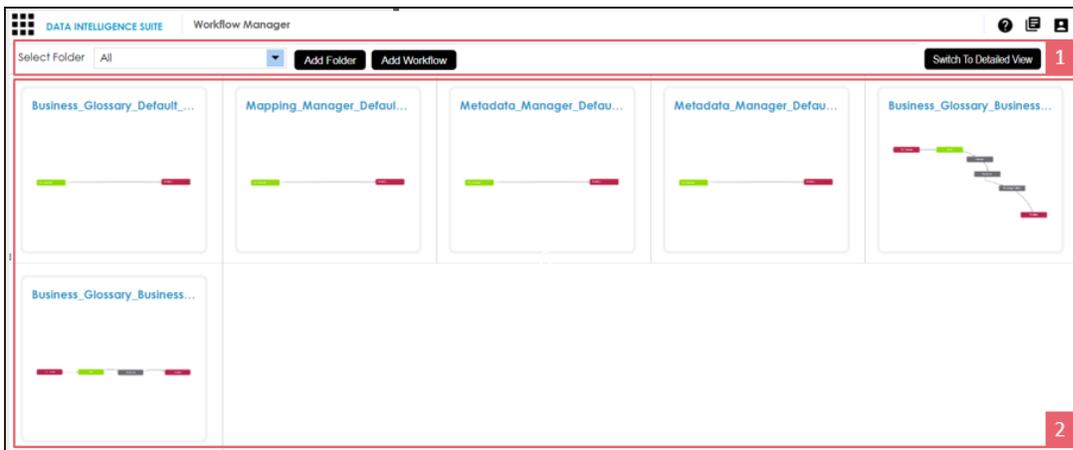
Also, you can create a collection of workflows and assign those workflows to any module based on the requirement.

For more information about Workflow Manager, refer to [Using Workflow Manager](#) topic.

Using Workflow Manager

The Workflow Manager displays a list of workflows and allows you to create and manage them.

To access the Workflow Manager, go to **Application Menu > Miscellaneous > Workflow Manager Manager**. The Workflow Manager dashboard appears:



UI Section	Function
1-Utility Pane	The utility pane allows you to: <ul style="list-style-type: none">▪ Select folders▪ Add folders▪ Add workflows

UI Section	Function
	<ul style="list-style-type: none"> Switch between tile view and detailed view
2-Workflow Pane	Use this pane to configure, assign, edit, delete or view the workflows.

Using Workflow Manager involves:

- [Adding folders](#)
- [Adding workflows](#)
- [Configuring workflows](#)
- [Managing mapping manager workflows](#)
- [Managing metadata manager workflows](#)
- [Managing business glossary manager workflows](#)

Adding Folders

You can create workflows and categorize them in folders. The application has a few default folders and workflows in it.

To create folders, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Click **Add Folder**.

The Add Folder page appears.

3. Enter a **Name** and **Description**.

For example:

- **Name:** Mapping_Manager_WF
- **Description:** This folder contains workflows for Mapping Manager module.

4. Click **Save**.

The new folder is created.

Once a folder is created, you can:

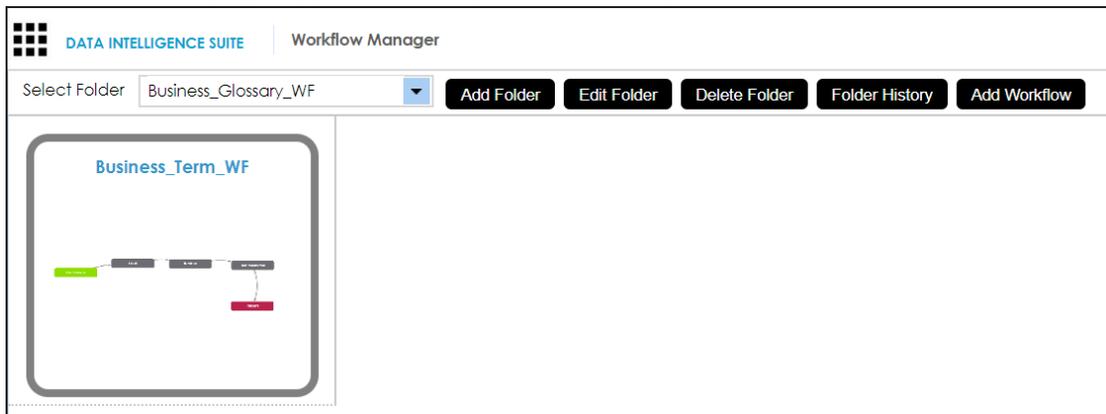
- [Add workflows](#)
- [Edit folders](#)
- [Delete folders](#)

Edit Folders

To update a folder information, follow these steps:

1. In the utility pane, select a folder.
2. Click **Edit Folder**.

The Edit Folder page appears, and update necessary fields.



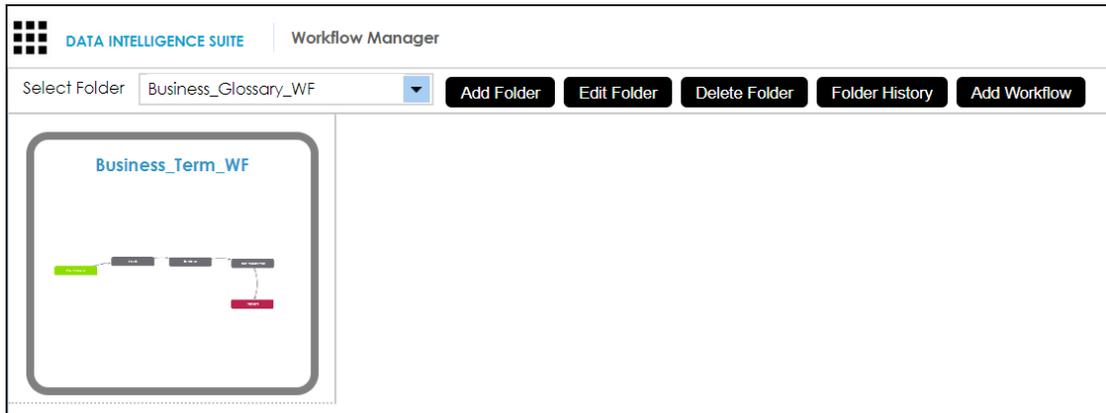
3. Click **Save**.

Delete Folders

To delete a folder, follow these steps:

1. In the utility pane, select a folder.
2. Click **Delete Folder**.
A warning message appears.

 Deleting a folder also deletes the workflows in it.



3. Click **Yes**.
The folder is deleted.

 You can not delete a folder if the workflows in it are used by objects.

Adding Workflows

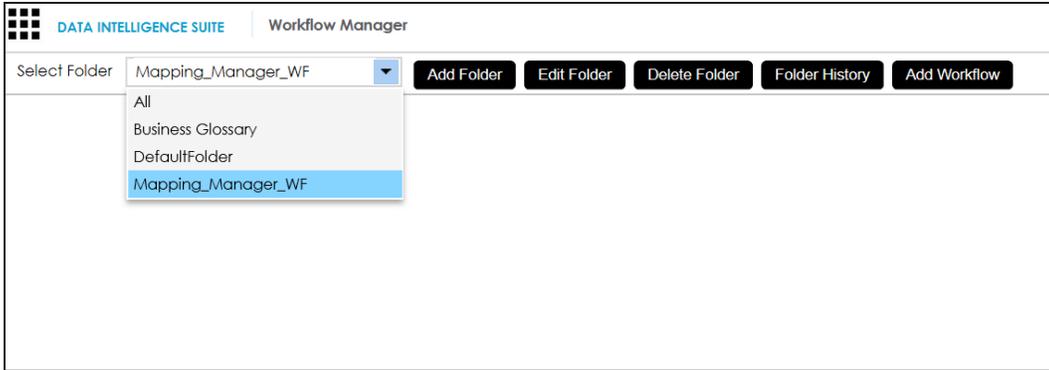
You can create workflows and add them to a folder.

These workflows can be triggered automatically based on the requirements for:

- Business Glossary Manager
- Metadata Manager
- Mapping Manager

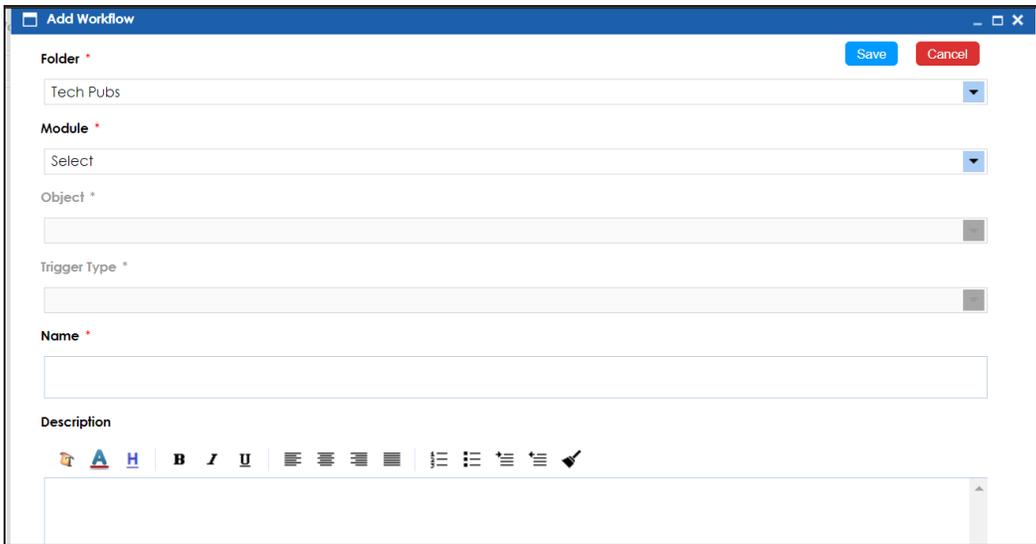
To add workflows, follow these steps:

1. In the **Workflow Manager** page, select a folder in the utility pane.
You can add workflows to the selected folder.



2. Click **Add Workflow**.

The Add Workflow page appears.



3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Folder *	Select a folder from the drop-down to add workflow.
Module *	Select an applicable module for this workflow from the drop-down. You can create workflow for Business Glossary Manager, Metadata Manager, and Mapping Manager.
Object *	Select an object for the workflow. These workflow will be applicable to

Field Name	Description
	selected object. The object list depends on the module you choose.
Trigger Type	Select a trigger type. The workflow will be triggered automatically based on this selection.
Name	Enter a name for the workflow. For example, Map_Wkflw.
Description	Enter a description about the workflow. For example: The workflow module is Mapping Manager and it is for the mapping object.

4. Click **Save**.

The workflow is added to the folder.

Once a workflow is added, you can:

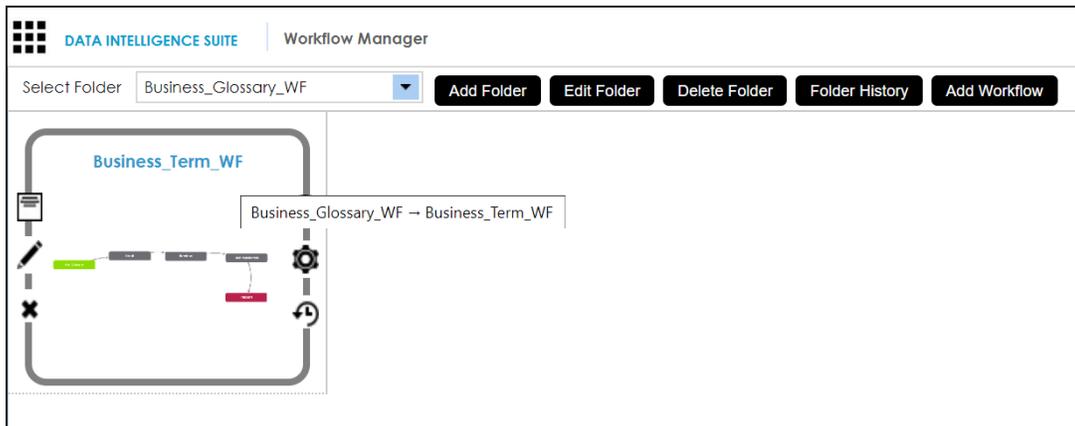
- [Configure workflows](#)
- [Edit workflows](#)
- [Delete workflows](#)

Edit Workflows

To update or edit a workflow, follow these steps:

1. In the utility pane, select a folder.
The workflow pane displays a list of workflow in that folder.

2. Hover over a workflow.



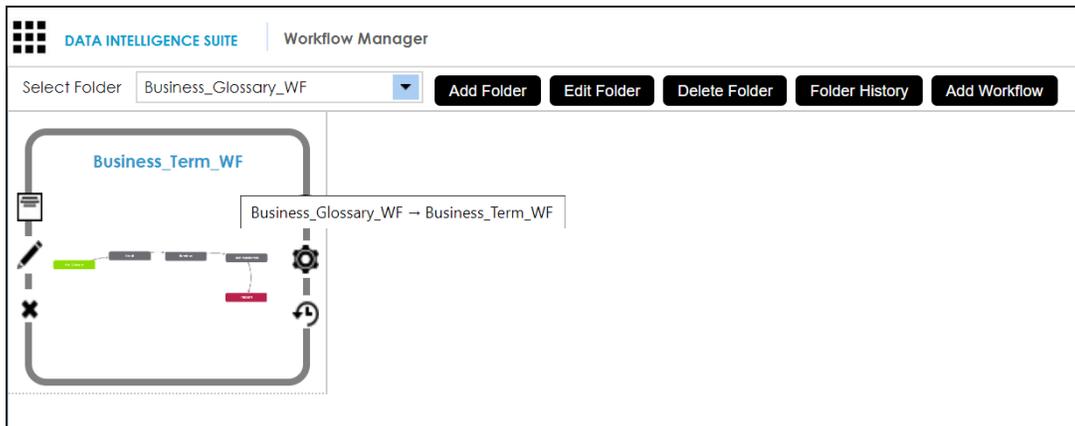
3. Click  .
The Edit Workflow page appears.
4. Click the **Folder** drop-down to choose a different folder for the workflow.
5. Update other necessary fields and click **Save**.
The workflow is updated.

Delete Workflows

To delete a workflow, follow these steps:

1. In the utility pane, select a folder.
The workflow pane displays a list of workflow in that folder.

2. Hover over a workflow.



3. Click **X**.
A warning message appears.
4. Click **Yes**.
The workflow is deleted.

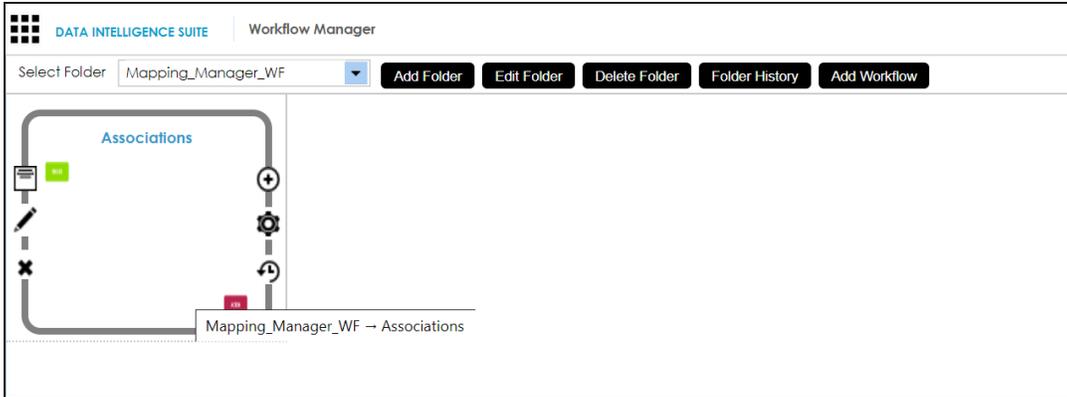
Configuring Workflows

After creating workflow, you can configure it by adding and connecting different stages in a sequence. You can also create different stages and assign roles to these stages.

Creating Stages

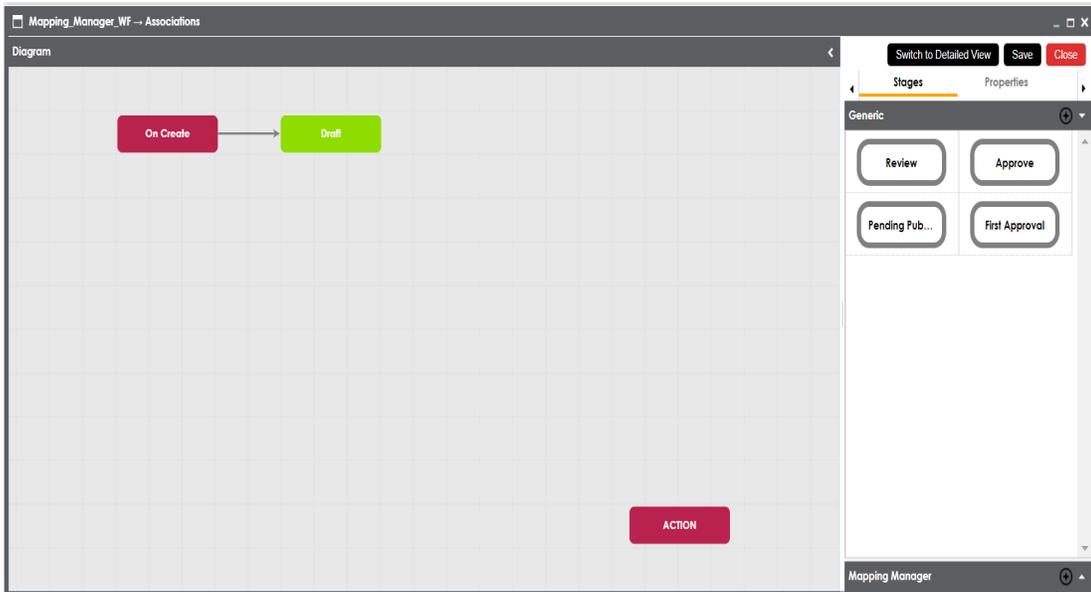
To create stages, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.
The workflow pane displays a list of workflows.
3. Hover over a workflow.



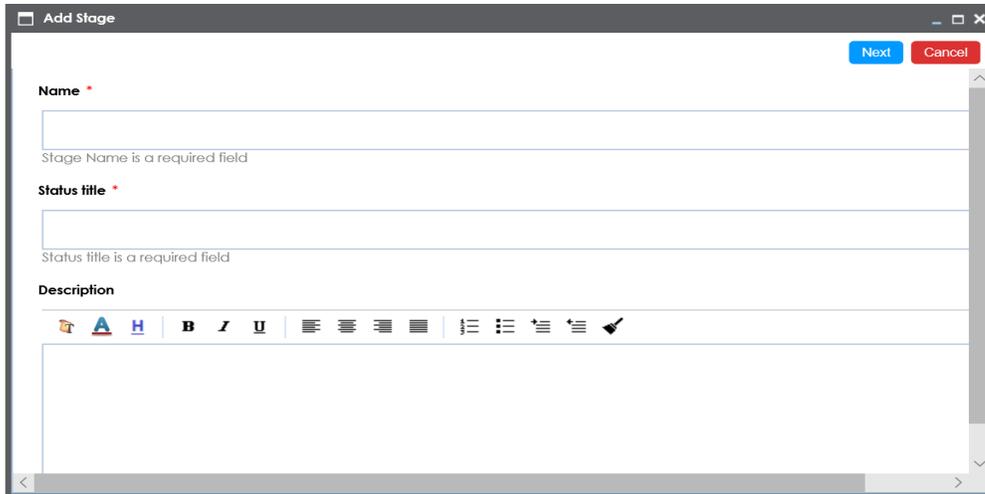
4. Click .

The following page appears. By default, the first stage name and status, both are set to Draft. You can configure the first stage name and status as per your requirements. For more information on configuring the first stage, refer to the [Configuring Workflow Settings](#) topic.



5. On the **Stages** tab and click .

The Add Stage page appears.



6. Enter **Name**, **Status Title**, and **Description**.

For example:

- **Name:** Review
- **Status Title:** Pending Review
- **Description:** The stage is part of Mapping_Manager_WF.

7. Click **Next**.

The Add Stage page appears.



The Select Governance Responsibilities section does not appear for mapping manager and metadata Manager workflows.

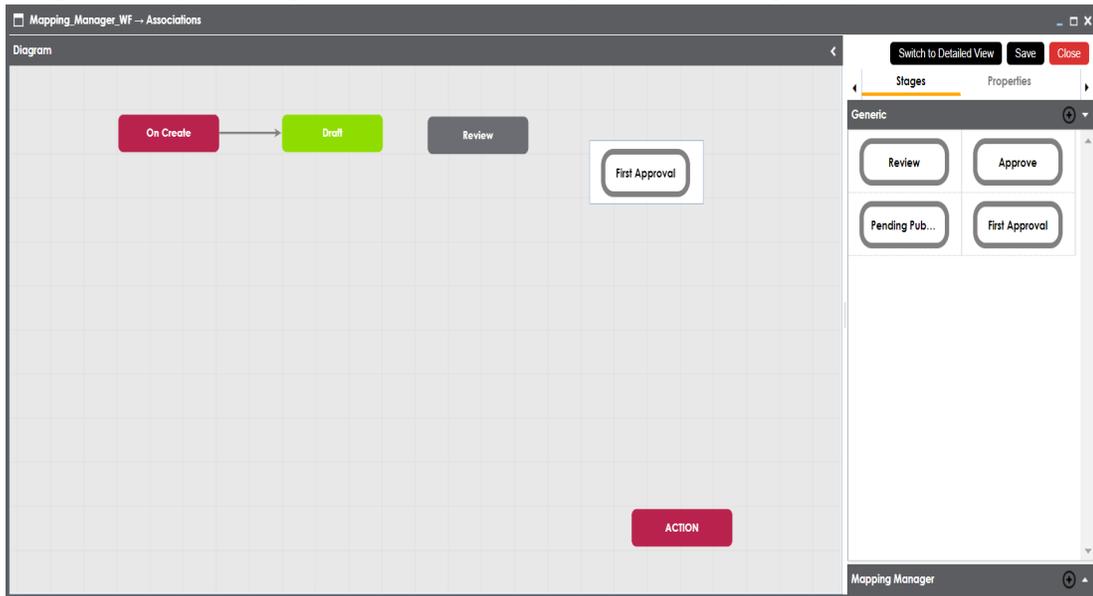
8. Select the required roles and roles groups.
9. Click **Save**.

The generic stage is created. You can create as many generic stages you want and assign roles to each stage.

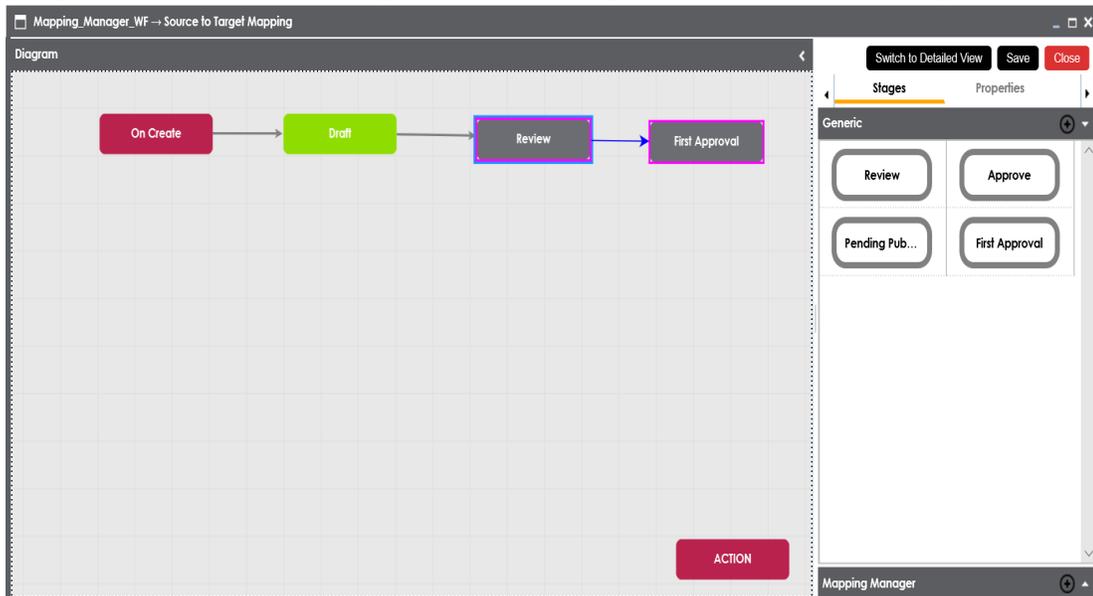
Adding Stages to Workflows

To add generic stages to workflows, follow these steps:

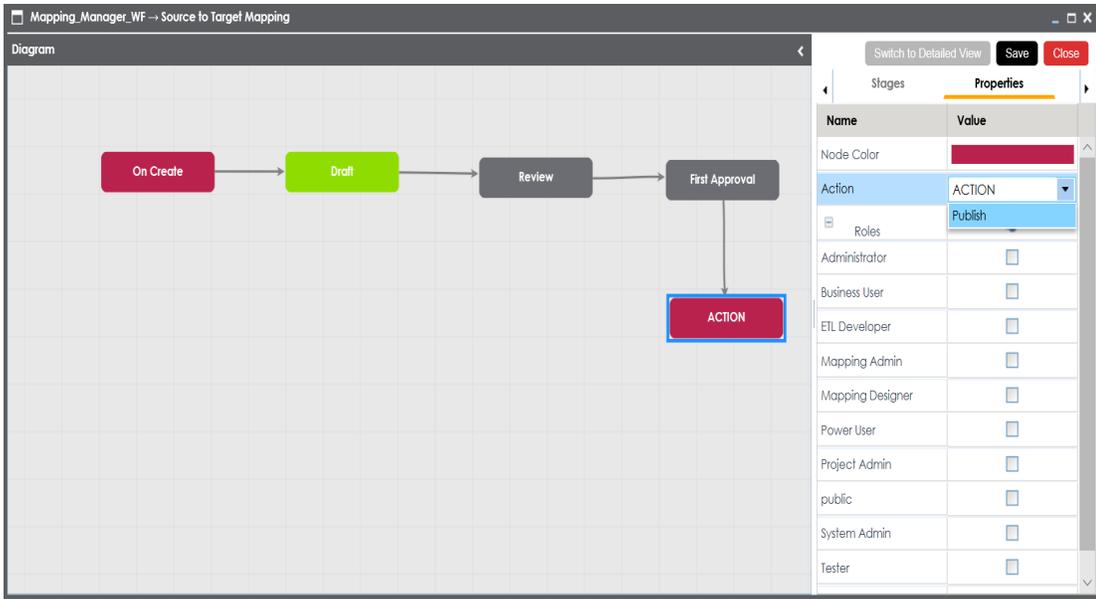
1. Drag and drop the stages from the **Generic** pane to the **Diagram** pane.



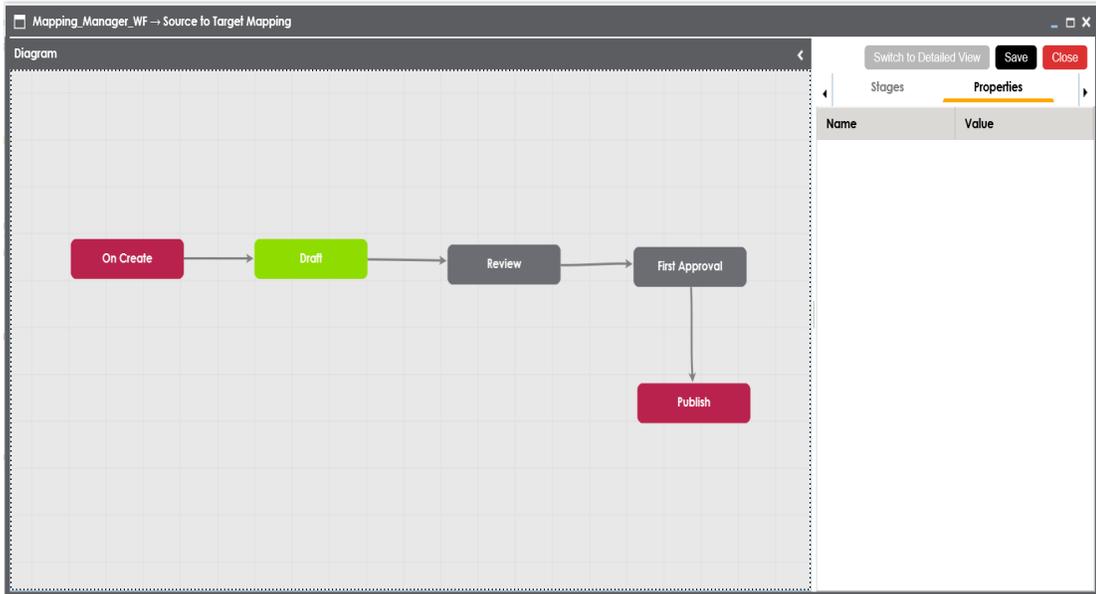
2. Drag the cursor from one stage to the next stage to connect the two stages.



3. Select **Action** stage block, and click **Properties**.
4. Double-click the cell under the **Value** column against **Action** and select **Publish**.



5. Select appropriate roles by selecting the appropriate check boxes.
6. Click **Save**.

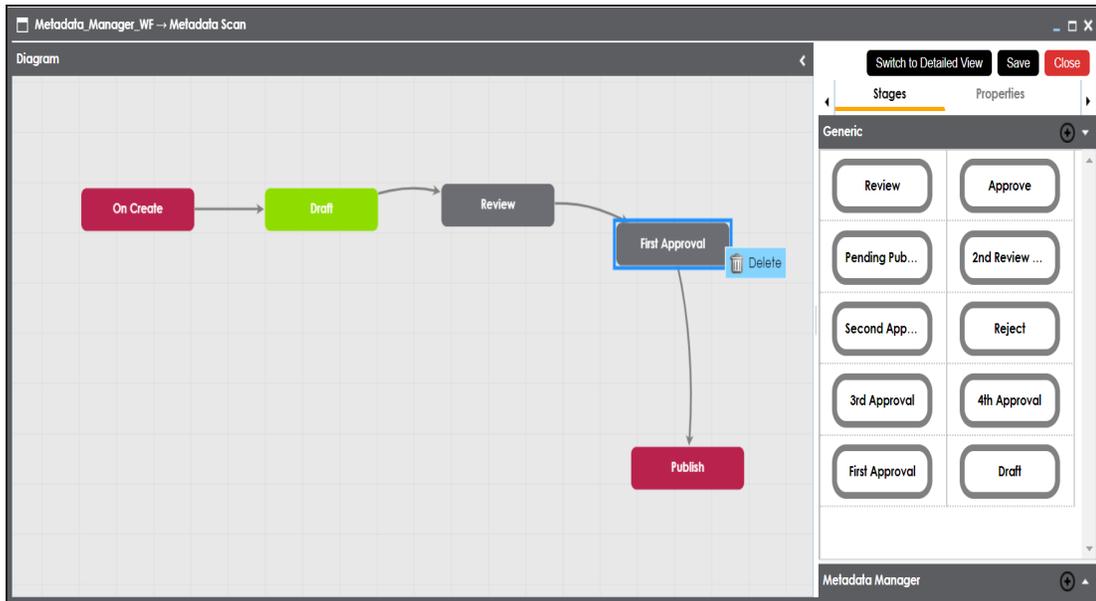


The workflow is configured and saved.

Deleting Stages

To delete stages from a workflow diagram, follow these steps:

1. In the **Diagram** pane, right-click a stage.



2. Click **Delete**.

The stage is deleted from the workflow diagram.

You can manage a stage in the Generic pane using the options available on the Properties tab. [Managing stages](#) involves:

- Editing or deleting a stage.
- Configuring properties of a stage.

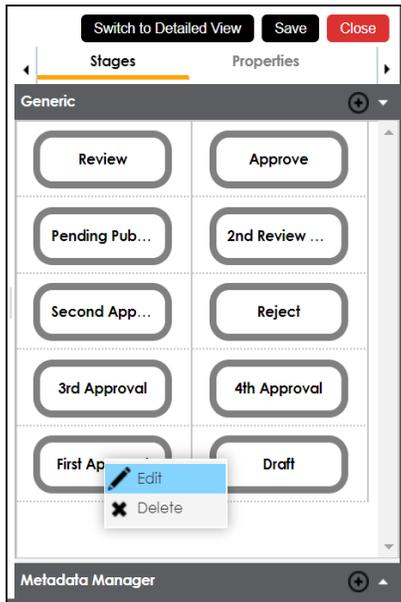
Managing Stages

Managing stages involves:

- Editing or Deleting stages
- Configuring properties

To edit or delete stages, follow these steps:

1. In the **Generic** pane, right-click a stage.



2. Use the following options:

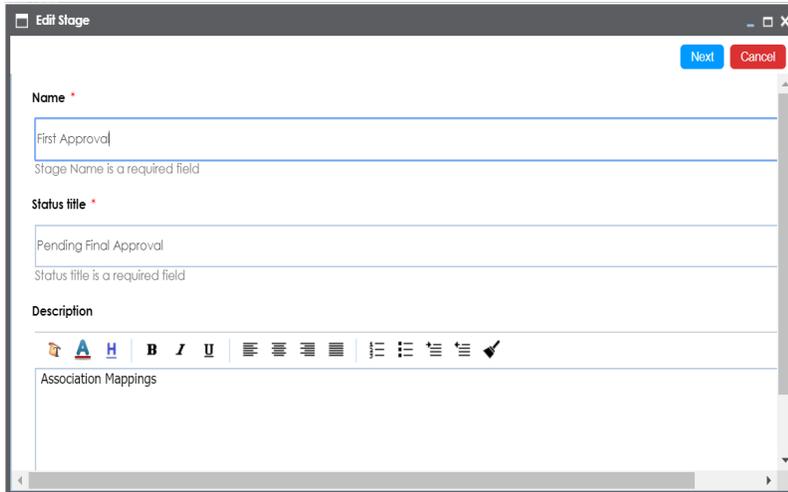
Edit

Use this option to update Name, Status Title, Description, and Roles assigned to the stage.

Click **Edit**.

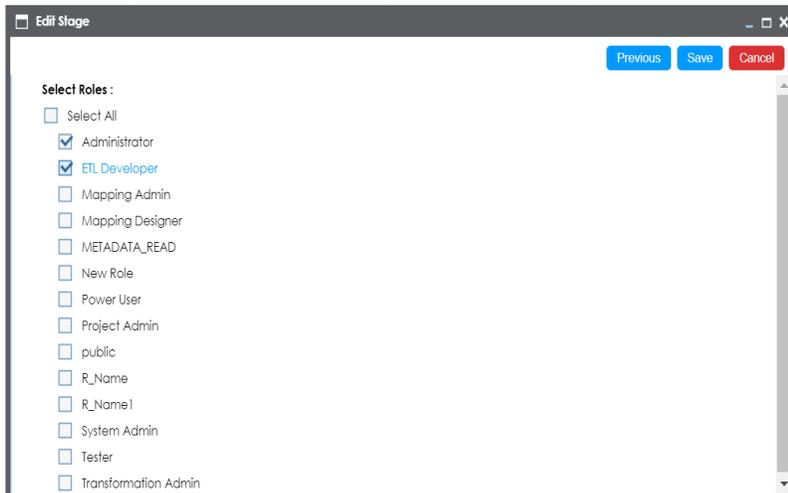
The Edit Stage page appears.

You can update the Name, Status Title, and Description.



Click **Next**.

You can update the roles assigned to the stage.



Click **Save**.

The stage is updated.

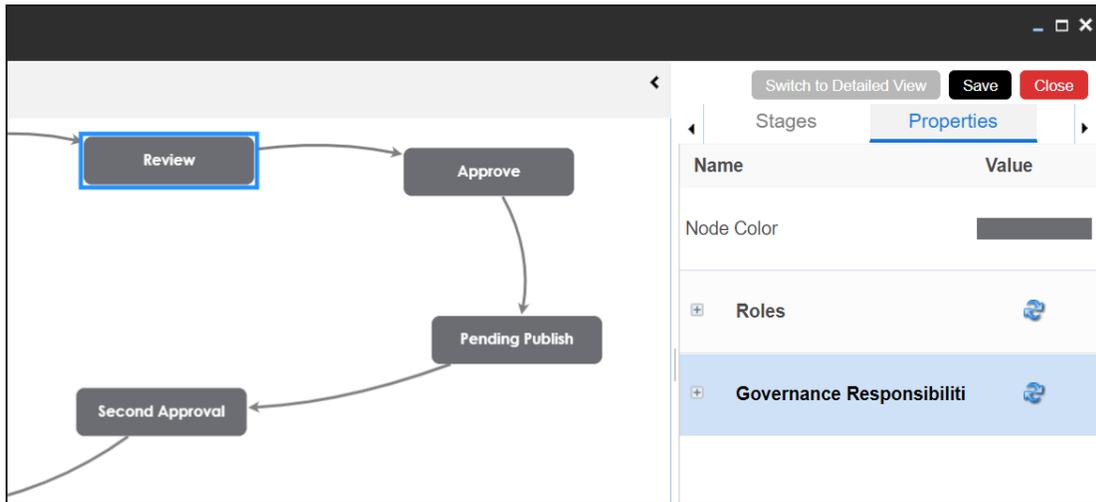
Delete

Use this option to delete a stage that is not required.

You can configure properties of a stage and update its node color, roles, and roles groups.

To configure properties, follow these steps:

1. In the **Diagram** pane, click a stage and then click the **Properties** tab.



2. Use the following options:

Node Color

Use this option to change the color of the stage node.

Click the cell next to the Node Color and use the color palette to set the color.

Roles

Use this option to assign roles to a stage.

Governance Responsibilities

Use this option to assign roles group to a stage.

3. Click **Save**.

The properties of the stage are configured.

Managing Mapping Manager Workflows

You can create a generic workflow and assign it to projects in the Mapping Manager.

Creating and configuring workflows involves:

1. [Adding folders](#)
2. [Adding workflows](#)

3. [Configuring workflows](#)

Once a workflow is configured it can be [assigned to projects in the Mapping Manager](#).

A workflow assigned to a project applies to all the mappings under the project. The workflow stages are assigned to different roles and the users assigned to those roles receive work queue notifications. The workflow can be [executed via workflow queue](#) and the mapping object moves across the different stages of the workflow.

Assigning Workflows to Projects

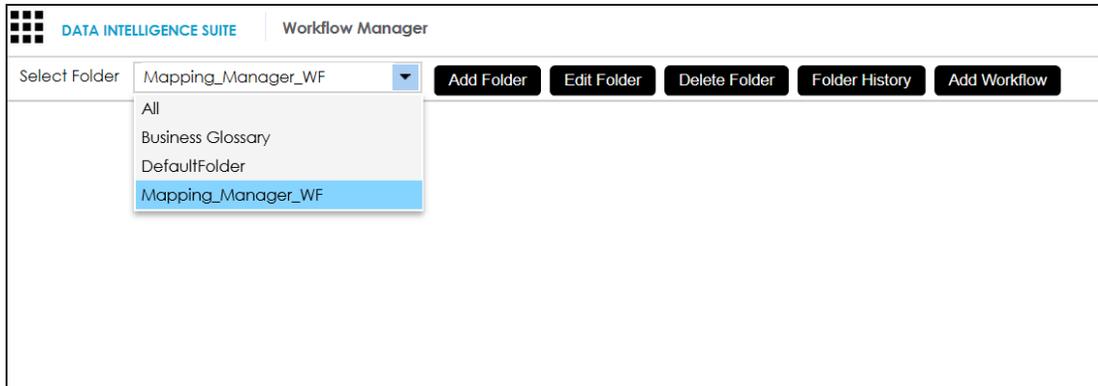
After creating, and configuring a workflow, you can assign the workflow to projects in the Mapping Manager.

Before you assign workflows to a project:

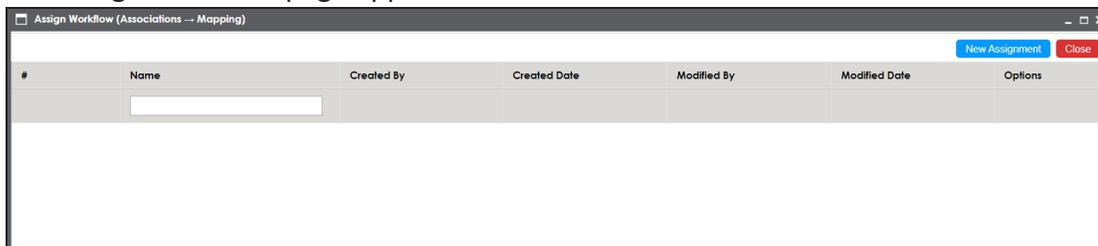
- Ensure that you choose **Mapping Manager** as a module and an object as **Mapping** while adding the workflow to the folder.
- Note that the default workflow (Mapping_Manager_Default_Workflow) is assigned to all the mappings in the Mapping Manager. You can re-assign your own workflow and over-ride the default workflow.

To assign workflows to projects, follow these steps:

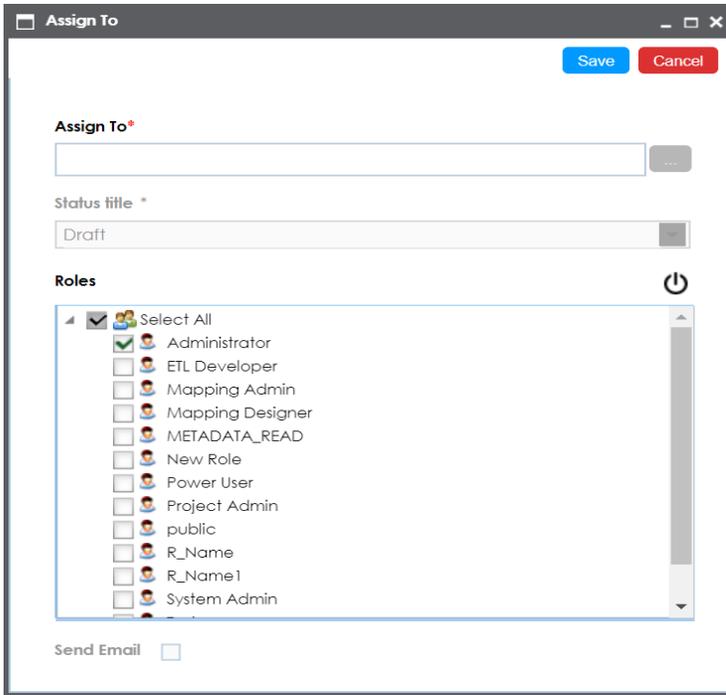
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.
All the workflows in the folder appears.



3. Hover over the required workflow, and click .
The Assign Workflow page appears.

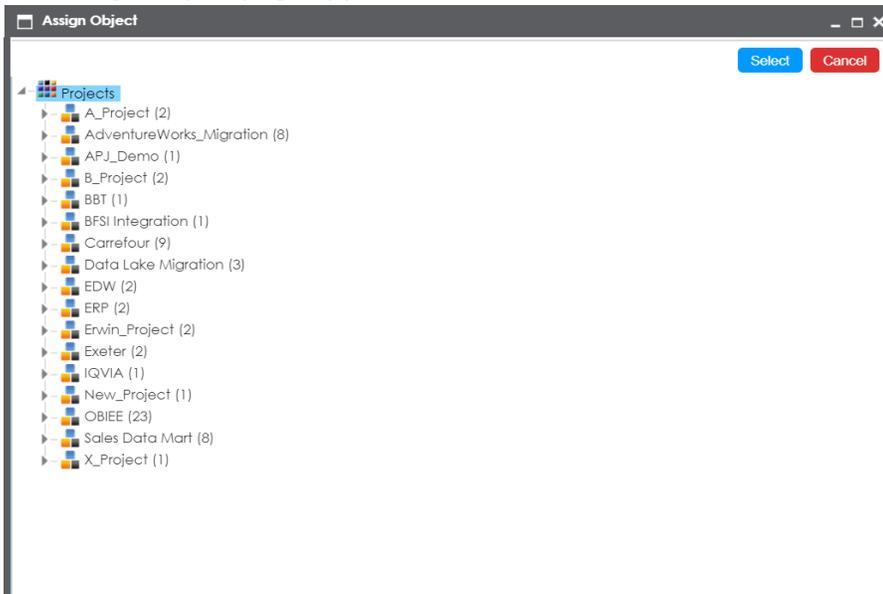


4. Click **New Assignment**.
The Assign To page appears.



5. In **Assign To** field, click .

The Assign Object page appears.



6. Select a project and click **Select**.

A warning page appears.

7. Click **Yes**.

The Workflow Re-assignment page appears displaying the **Current Object Status** and gives you option to select the **Fallback/New Status**.



Fallback/New Status options depend on Title Status of the stages in the workflow.

Workflow Re-Assignment

Next Cancel

Please select the fallback or new status for the existing objects

Current Object Status	Fallback/New Status
Draft	<ul style="list-style-type: none">DraftPending ReviewPending Final Approval

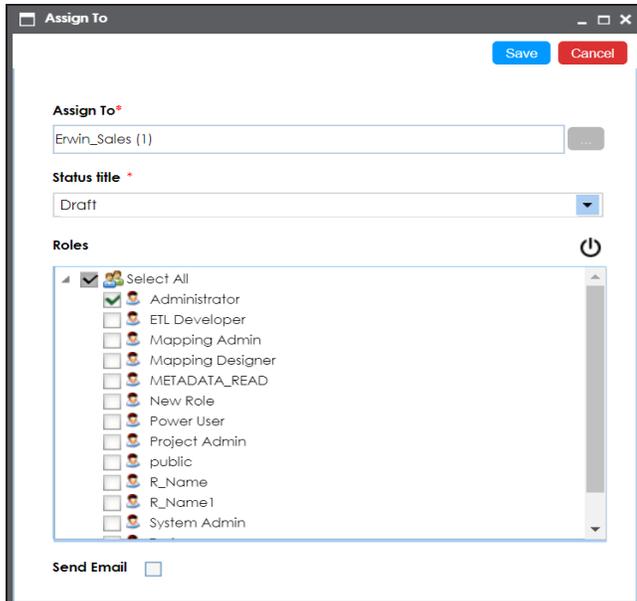
8. Select an appropriate **Fallback/New Status**.

For example, if you select Draft, then the new status of the mappings is set to Draft.

9. Click **Next**.

10. Enter comments, and click

The Assign To page re-appears with Assign To field filled.



You can update roles assigned to the new fall back stage and select **Send Email** check box to send email notifications about the assignment. These notifications are sent from administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

11. Click **Save**.

The workflow is assigned to the selected project in the Mapping Manager and it applies to all the mappings under the project.

Once the workflow is assigned successfully to a project in mapping manager, users who are part of the assigned roles will get work queue notifications. For more information on workflow execution via workflow queue, refer to the [Executing Workflows via the Workflow Queue](#) topic.

Executing Workflows

When you assign a workflow to a project, the workflow is applicable to all the mappings under the project.

A workflow has different stages and each stage is assigned to different roles. The users with the assigned roles receive the work queue notifications as the object moves across the stages. They can enter relevant comments while moving the object to the next stage.

Executing workflows involves:

1. Receiving workflow queue notifications
2. Examining and moving the mapping object to the next stage

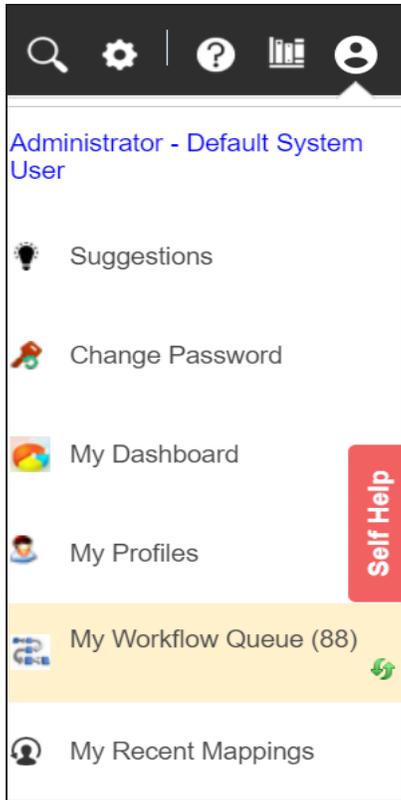
To execute workflows for the mappings in the Mapping Manager, follow these steps:

1. Go to **Application Menu > Data Catalog > Mapping Manager**.

The Mapping Manager page appears.

#	Project Name	Project Description	Project Owner	Subject Count	Mapping Count	Created By	Created Date Time	Last Modified By	Last Modified Time
7	ABC			0	2	Administrator	2020-03-17 05:34:23.33	Administrator	2020-03-17 05:34:23.33

2. Click .



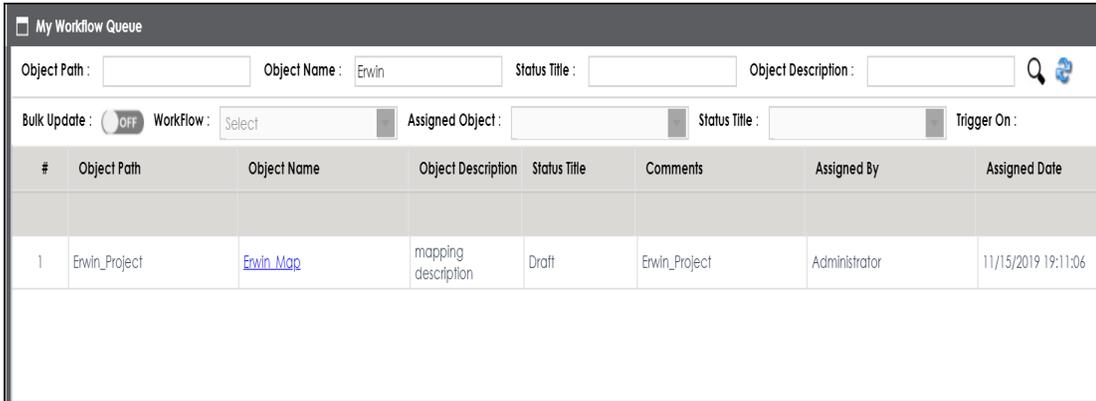
3. Click **My Workflow Queue**.

The My Workflow Queue page appears showing workflow queues.

My Workflow Queue							
Object Path :		Object Name :		Status Title :		Object Description :	
Bulk Update : <input type="checkbox"/> OFF		Workflow : Select		Assigned Object :		Status Title :	
Trigger On :							
#	Object Path	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	ERP	SAP		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
3	ERP	SAP		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
5	Data Lake Migration/Data Lake To EDW	Load_Customers		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
7	Data Lake Migration/Data Lake To EDW	Load_Customers		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
9	Data Lake Migration/EDW To Reports	Load_Customer_Report		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58

- Search the required object. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

The search results appear.

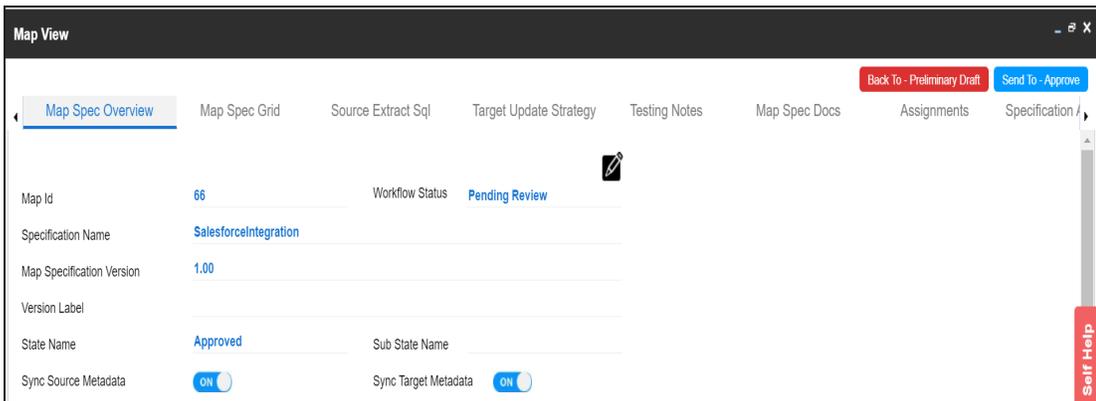


The screenshot shows the 'My Workflow Queue' interface. At the top, there are search filters for Object Path, Object Name (Erwin), Status Title, and Object Description. Below the filters, there are controls for Bulk Update (OFF), Workflow (Select), Assigned Object, Status Title, and Trigger On. A table below displays the search results:

#	Object Path	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Erwin_Project	Erwin_Map	mapping description	Draft	Erwin_Project	Administrator	11/15/2019 19:11:06

- Click the <Object_Name> appearing as a hyperlink.

The Map View page appears.

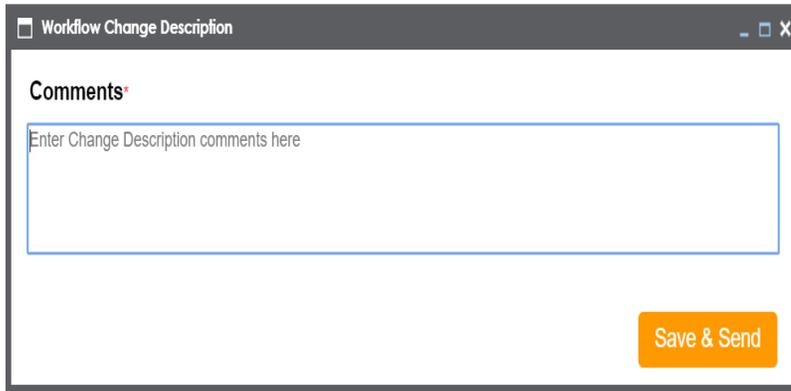


The screenshot shows the 'Map View' interface. At the top, there are navigation tabs: Map Spec Overview (selected), Map Spec Grid, Source Extract Sql, Target Update Strategy, Testing Notes, Map Spec Docs, Assignments, and Specification. Below the tabs, there are buttons for 'Back To - Preliminary Draft' and 'Send To - Approve'. The main content area displays the following details:

Map Id	66	Workflow Status	Pending Review
Specification Name	SalesforceIntegration		
Map Specification Version	1.00		
Version Label			
State Name	Approved	Sub State Name	
Sync Source Metadata	<input checked="" type="checkbox"/>	Sync Target Metadata	<input checked="" type="checkbox"/>

- Click **Send To - <Next_Stage>** to move the object to the next stage of the workflow.

The Workflow Change Description page appears.



7. Add relevant comments and click **Save & Send**.

The workflow status is updated to the <Title_Status> of next stage and the users with the assigned roles receive the work queue notification.



Each stage in the workflow is assigned to different roles. For example, if the Draft stage in the workflow was assigned to Mapping Admin role then, the users with the Mapping Admin role receive the work queue notification.

The workflow status is updated and can be viewed in the Mapping Manager. For more information on viewing the workflow logs, refer to the [Viewing Workflow Log](#) topic.

In the same manner you can move the object to different stages and finally publish the mapping object. Once the mapping is published, it moves into the Published Mappings tab (in Mapping Manager) and a new version of the mapping is created in the Workspace Mappings tab (in the Mapping Manager).

Managing Metadata Manager Workflows

You can create metadata manager workflows for three objects:

- Environments
- Tables
- Columns

Creating and configuring metadata manager workflows involves:

1. [Adding folders](#)
2. [Adding workflows](#)
3. [Configuring workflows](#)

After configuring generic workflows, you can:

- [Assign workflows to the environments](#)
- [Assign workflows to the tables](#)
- [Assign workflows to the columns](#)

The workflow stages are assigned to different roles and the users assigned to those roles receive work queue notifications. The workflow can be executed via a workflow queue and the object moves across the different stages of the workflow.

Execution of metadata manager workflows via workflow queue involves:

- [Executing workflows for environments](#)
- [Executing workflows for tables](#)
- [Executing workflows for Columns](#)

Assigning Workflows to Environments

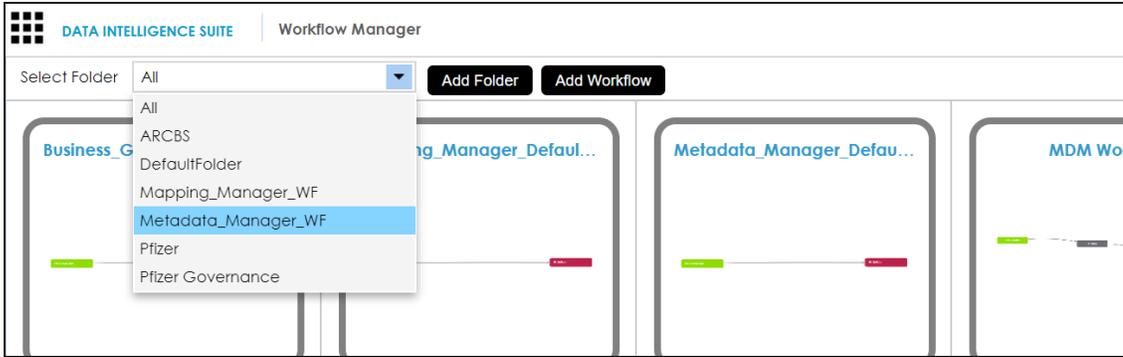
After creating, and configuring a workflow, you can assign the workflow to environments in the Metadata Manager.

Before you assign workflows to an environment:

- Ensure that you choose **Metadata Manager** as module and **Environment** as an object while adding the workflow to the folder.
- Ensure that you assign the workflow to the system before creating the environment.
- The workflow assigned to a system applies to all the environments under the system.

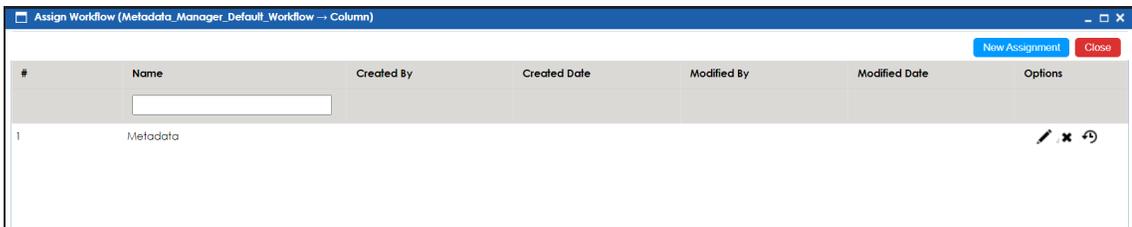
To assign workflows to environments, follow these steps:

1. In the **Workflow Manager** page, select a folder.
All the workflows in the folder appears.



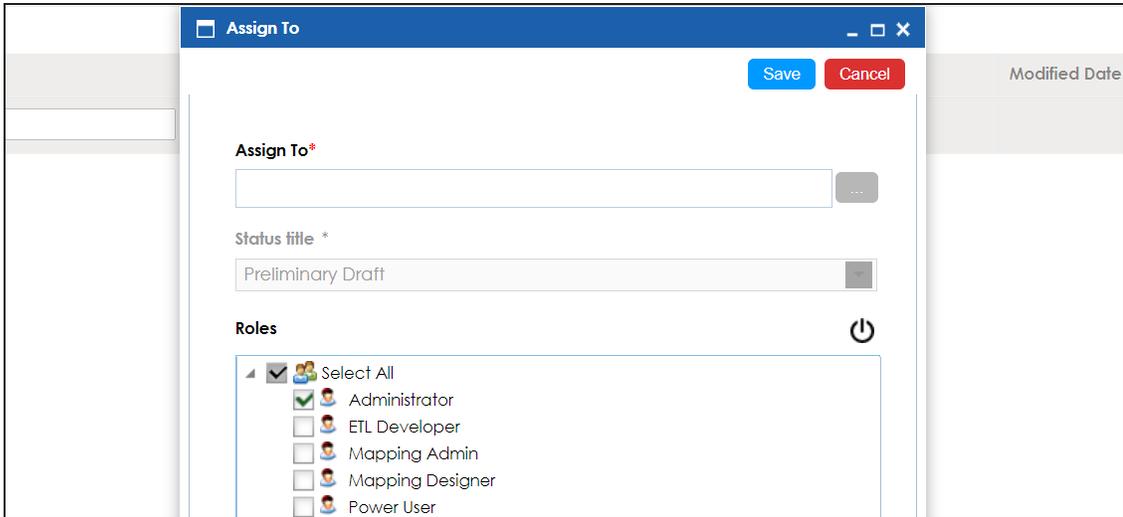
2. Hover over a workflow and click .

The Assign Workflow page appears.



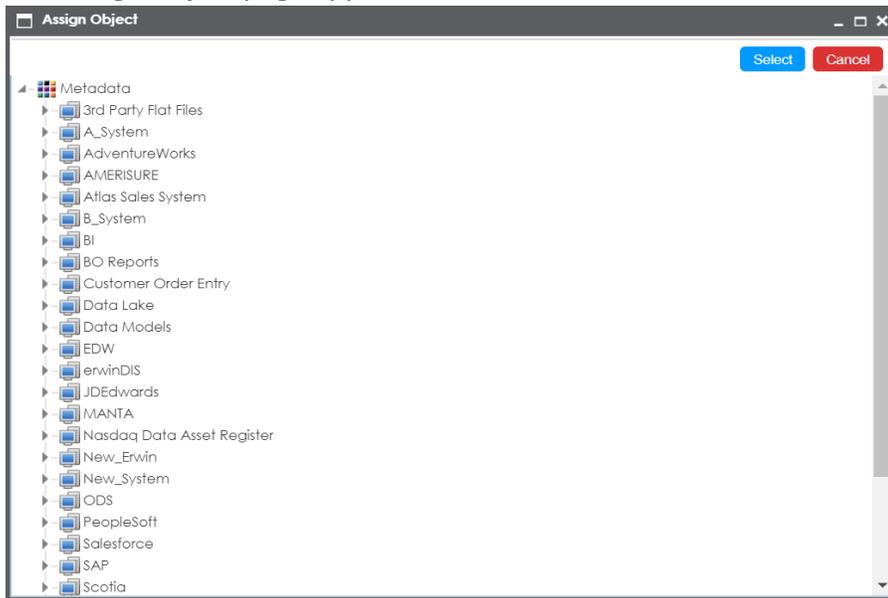
3. Click **New Assignment**.

The Assign To page appears.



4. In **Assign To** field, click .

The Assign Object page appears.



5. Select a system.

The workflow would apply to all the environments to be created under the system.

6. Click **Select**.

The Assign To page re-appears with Assign To field filled.

7. Select a **Status Title** from which the workflow starts.

A Status Title is assigned to a stage while creating a stage.

8. Select an appropriate **Roles**.

9. Select the **Send Email** check box to receive an email notification.

10. Click **Save**.

The workflow is assigned to the system.

Once the workflow is assigned successfully to a system in the Metadata Manager, users who are part of the assigned roles will get work queue notifications. For more information, on the execution of workflow via work queue notifications, refer to the [Executing Workflows for Environments via Workflow Queue](#) topic.

Executing Workflows for Environments

A workflow has different stages and each stage is assigned to different roles. The users with the assigned roles receive the work queue notifications as the object moves across the stages. They can enter relevant comments while moving the object to the next stage.

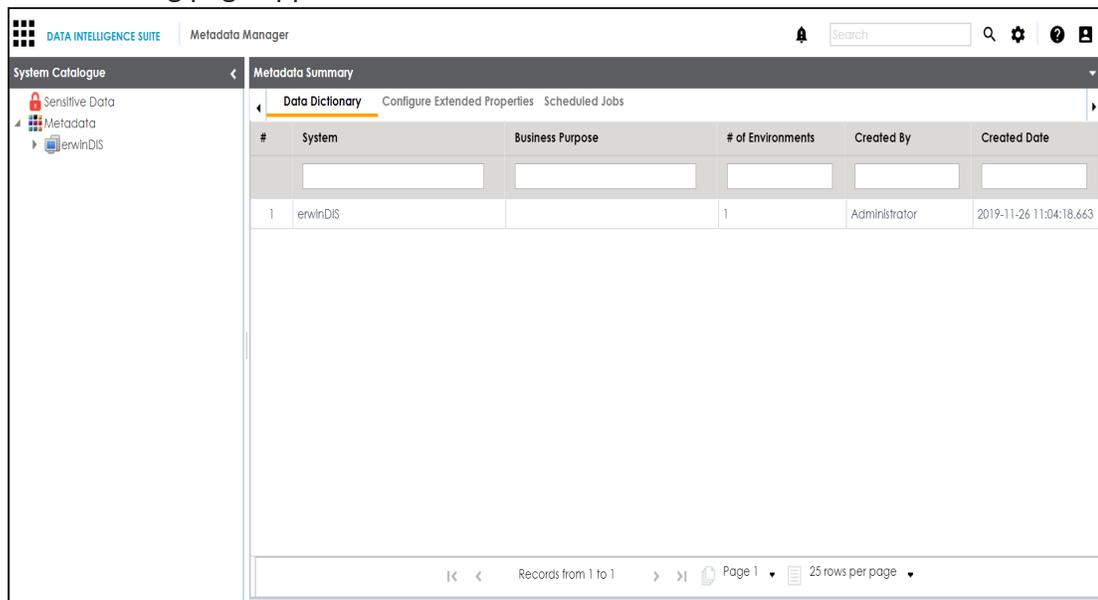
Executing workflows involves:

1. Receiving workflow queue notifications
2. Examining and moving the environment to the next stage

To execute workflows for the Environments in the Metadata Manager, follow these steps:

1. Go to **Application Menu > Data Catalog > Metadata Manager**.

The following page appears.



The screenshot shows the Metadata Manager interface. On the left is the System Catalogue with a tree view containing 'Sensitive Data', 'Metadata', and 'erwinDIS'. The main area is titled 'Metadata Summary' and contains a 'Data Dictionary' table. The table has columns for '#', 'System', 'Business Purpose', '# of Environments', 'Created By', and 'Created Date'. A single record is visible for 'erwinDIS' with 1 environment, created by 'Administrator' on '2019-11-26 11:04:18.663'. The bottom of the interface shows pagination controls: 'Records from 1 to 1', 'Page 1', and '25 rows per page'.

#	System	Business Purpose	# of Environments	Created By	Created Date
1	erwinDIS		1	Administrator	2019-11-26 11:04:18.663

2. Click .
3. Click **My Workflow Queue**.

The My Workflow Queue page appears showing the workflow queues of the logged in user.

My Workflow Queue

Object Path : Object Name : Status Title : Object Definition :

Bulk Update : Off Workflow : Assigned Object : Status Title : Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwinDIS	Environment	erwin_DIS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:42
2	erwinDIS/erwin_DIS	Table	dbo.ADS_ASSOCIATIONS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
3	erwinDIS/erwin_DIS	Table	dbo.ADS_FORM		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
4	erwinDIS/erwin_DIS	Table	dbo.ADS_KEY_VALUE		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
5	erwinDIS/erwin_DIS	Table	dbo.ADS_KEY_VALUE_OBJECTS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
6	erwinDIS/erwin_DIS	Table	dbo.ADS_MM_VERSION		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
7	erwinDIS/erwin_DIS	Table	dbo.ADS_MODULES		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
8	erwinDIS/erwin_DIS	Table	dbo.ADS_OBJECT_CODESETS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
9	erwinDIS/erwin_DIS	Table	dbo.ADS_OBJECT_TO_OBJECT		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57

Records from 1 to 25 of 441

4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking . The search results are displayed.

My Workflow Queue

Object Path : Object Name : Status Title : Object Definition :

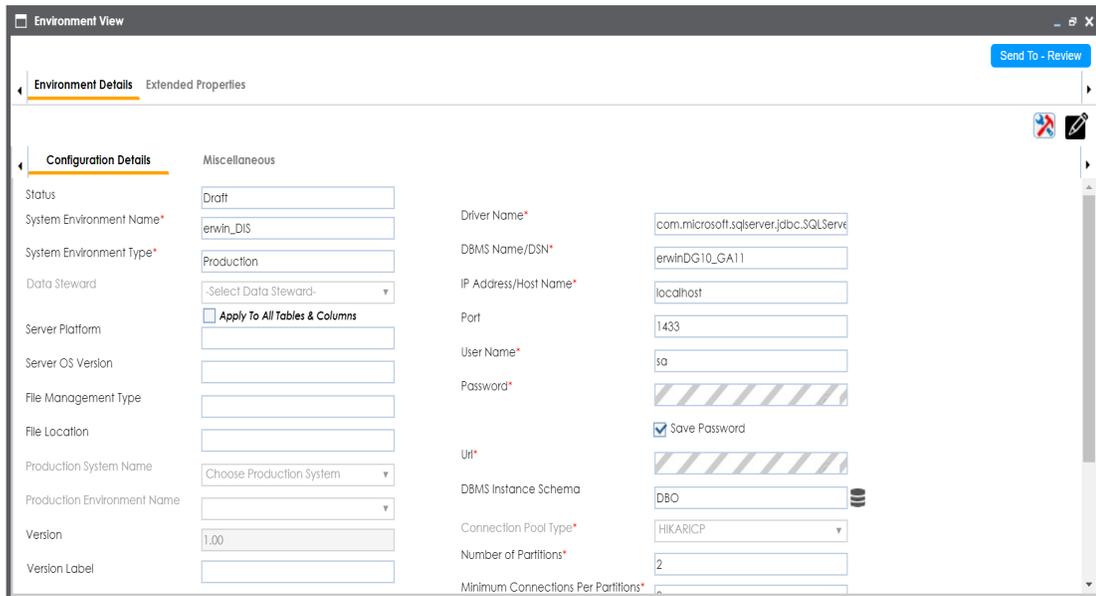
Bulk Update : Off Workflow : Assigned Object : Status Title : Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwinDIS	Environment	erwin_DIS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:42

Records from 1 to 1 of 1

5. Click the required <Object Name> which appears as hyperlink.

The Environment View page appears.

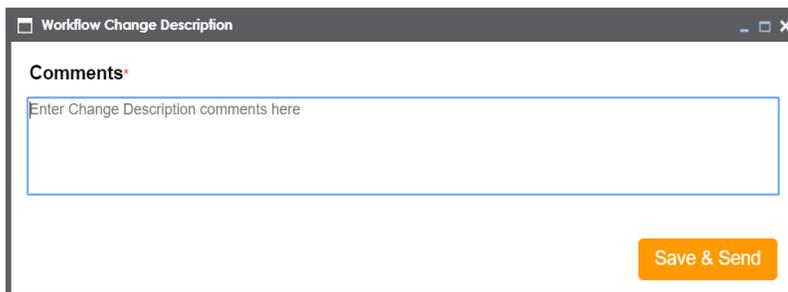


The screenshot shows the 'Environment View' window with the 'Environment Details' tab selected. The 'Configuration Details' section is active, displaying various fields for configuring a database environment. The fields are organized into two columns: 'Configuration Details' and 'Miscellaneous'.

Configuration Details	Miscellaneous
Status: Draft	Driver Name*: com.microsoft.sqlserver.jdbc.SQLServe
System Environment Name*: erwin_DIS	DBMS Name/DSN*: erwinDG10_GA11
System Environment Type*: Production	IP Address/Host Name*: localhost
Data Steward: -Select Data Steward-	Port: 1433
<input type="checkbox"/> Apply To All Tables & Columns	User Name*: sa
Server Platform:	Password*: [Masked]
Server OS Version:	<input checked="" type="checkbox"/> Save Password
File Management Type:	Util*: [Masked]
File Location:	DBMS Instance Schema: DBO
Production System Name: Choose Production System	Connection Pool Type*: HIKARICP
Production Environment Name:	Number of Partitions*: 2
Version: 1.00	Minimum Connections Per Partitions*: 5
Version Label:	

6. Click **Send To - <Next_Stage>** to move the object to the next stage of the workflow.

The Workflow Change Description page appears.



The screenshot shows the 'Workflow Change Description' window. It features a large text area for entering comments, a 'Save & Send' button, and a 'Comments*' label.

Comments*

Enter Change Description comments here

Save & Send

7. Add relevant comments and click **Save & Send**.

The workflow status is updated to the <Title_Status> of next stage and the users with the assigned roles receive the work queue notification.



Each stage in the workflow is assigned to different roles. For example, if the Draft stage in the workflow was assigned to Mapping Admin role then, the users with the Mapping Admin role receive the work queue notification.

As the object moves through different stages, you can view the workflow log to see its workflow status. For more information on viewing the workflow log of environments, refer to the [Viewing Workflow Logs](#) topic.

An environment can be moved to different stages and finally, it can be published.

Assigning Workflows to Tables

After creating, and configuring a workflow, you can assign the workflow to tables in Metadata Manager.

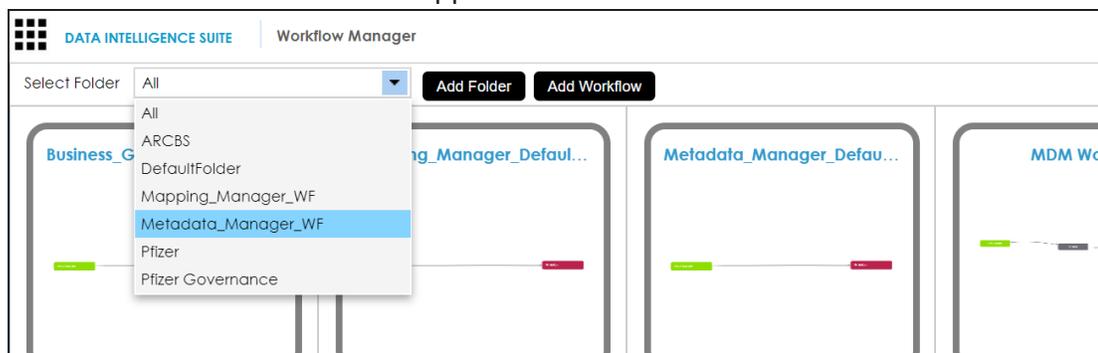
Before you assign workflows to tables:

- Ensure that you select **Metadata Manager** as module and **Table** as object while adding the workflow to the folder.
- The default workflow, Metadata_Manager_Default_Workflow_1 is assigned to all the tables. Hence, you need to override the existing default workflow.

To assign workflows to tables, follow these steps:

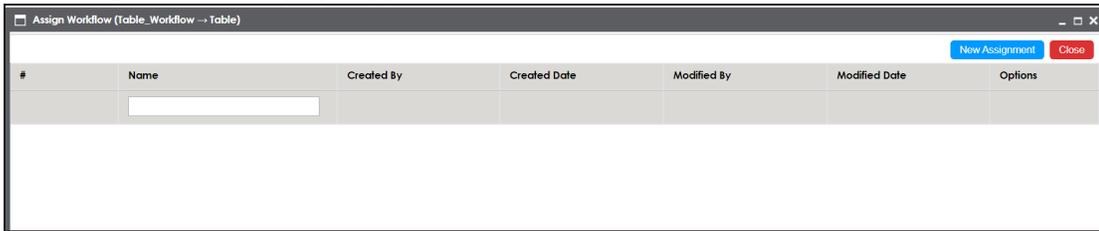
1. In the **Workflow Manager** page, select a folder.

All the workflows in the folders appear.



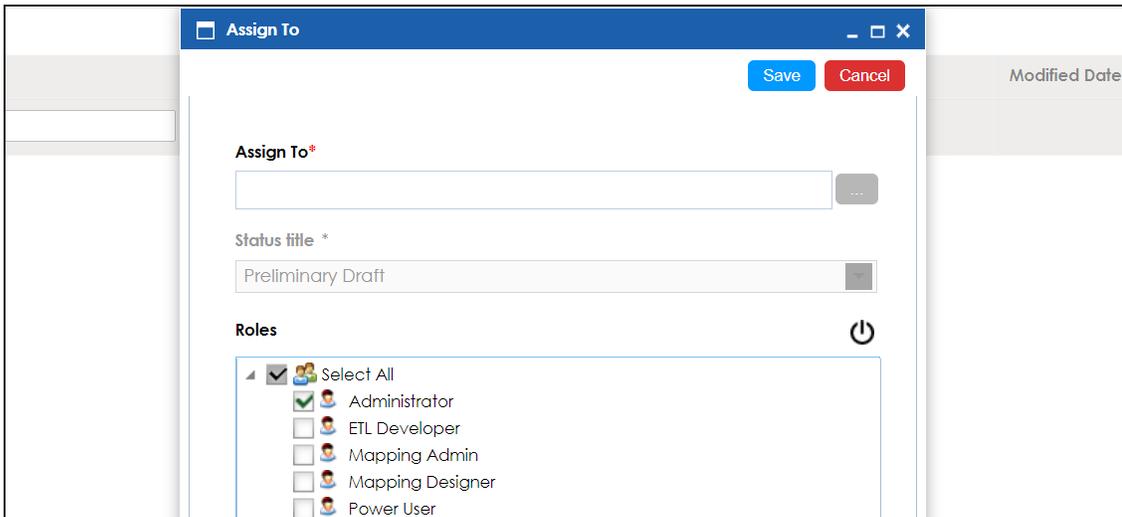
2. Hover over a workflow, and click .

The Assign Workflow page appears.



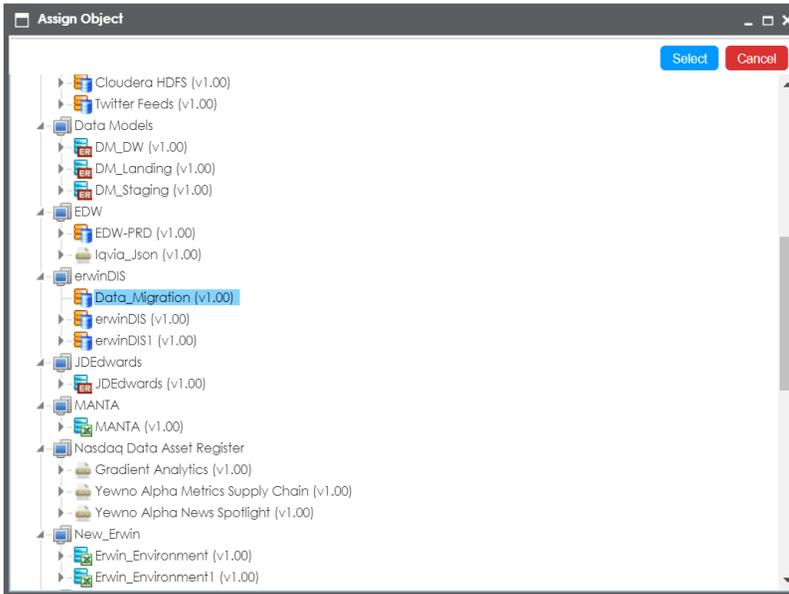
3. Click **New Assignment**.

The Assign To page appears.



4. In **Assign To** field, click .

The Assign Object page appears.



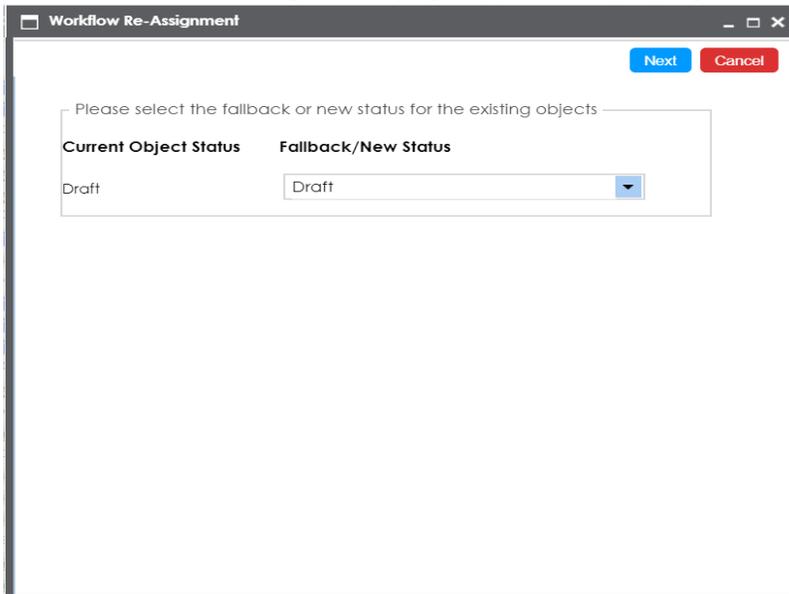
5. Click an Environment containing with required table.

6. Click **Select**.

A warning message appears giving you an option to override the existing workflow.

7. Click **Yes** to override the existing workflow.

The Workflow Re-Assignment page appears displaying the Current Object Status.



8. Select the appropriate Fallback/New Status.

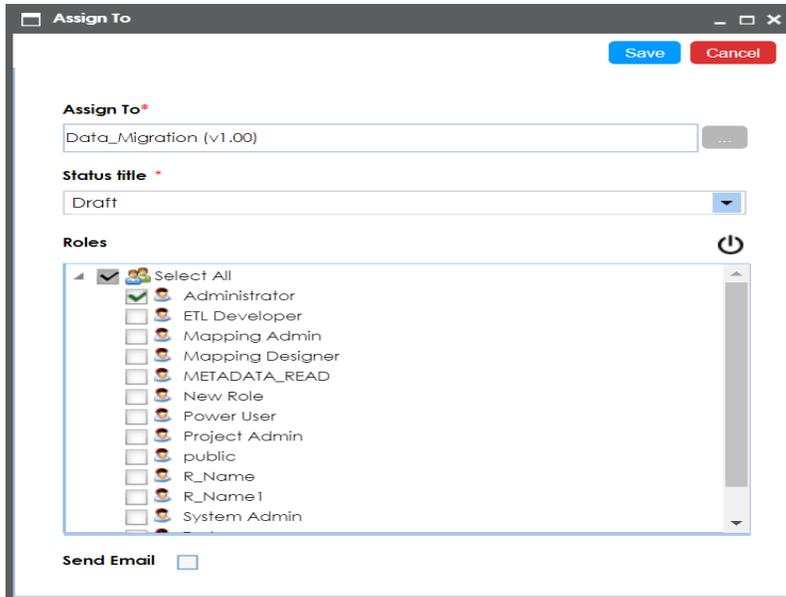
The options for Fallback/New Status depends on the [stages defined in the workflow](#).

9. Click **Next**.

The Comments page appears.

10. Enter relevant comments, and click .

The Assign To page re-appears with Assign To field filled.



11. Select the **Status Title** from which the workflow starts.

A Status Title is assigned to a stage while creating the stage.

12. Select the appropriate **Roles**.

13. Select the **Send Email** check box to receive email notification.

14. Click **Save**.

The workflow is assigned to all the tables in the selected environment.

Once a workflow is assigned successfully to the tables in the selected environment, users who are part of the assigned roles will get work queue notifications. For more information on the workflow execution via workflow queue notifications, refer to the [Executing Workflow for Tables via Workflow Queue](#) topic.

Executing Workflows for Tables

A workflow has different stages and each stage is assigned to different roles. The users with the assigned roles receive the work queue notifications as the object moves across the stages. They can enter relevant comments while moving the object to the next stage.

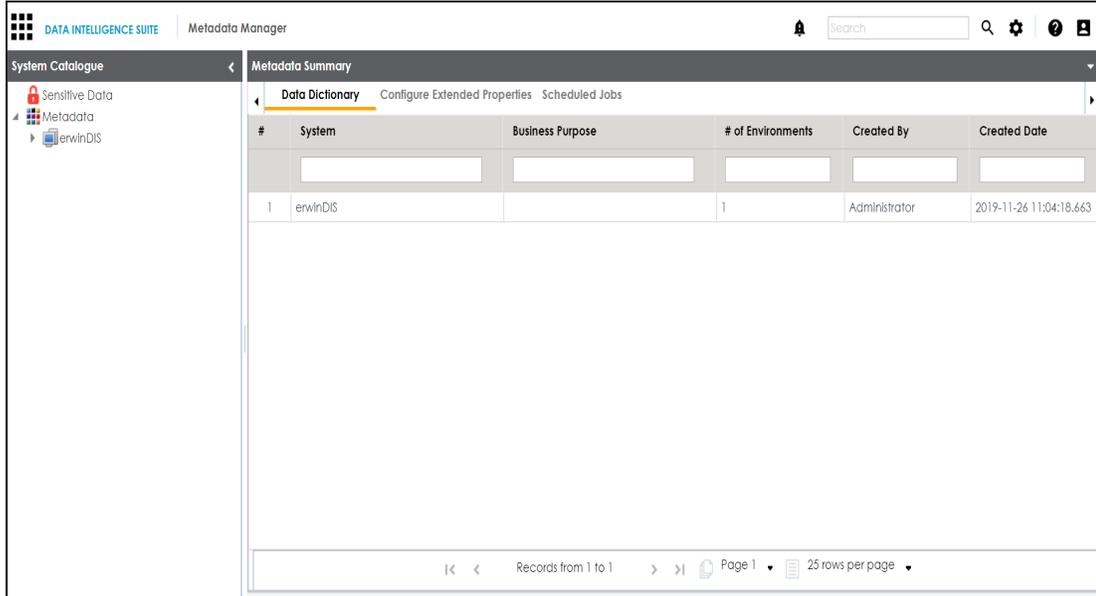
Executing workflows involves:

1. Receiving workflow queue notifications
2. Examining and moving the table to the next stage

To execute workflows for the Tables in the Metadata Manager, follow these steps:

1. Go to **Application Menu > Data Catalog > Metadata Manager**.

The following page appears.



The screenshot shows the Metadata Manager interface. On the left is the System Catalogue with a tree view containing 'Sensitive Data', 'Metadata', and 'erwinDIS'. The main area is titled 'Metadata Summary' and has tabs for 'Data Dictionary', 'Configure Extended Properties', and 'Scheduled Jobs'. Below the tabs is a table with the following data:

#	System	Business Purpose	# of Environments	Created By	Created Date
1	erwinDIS		1	Administrator	2019-11-26 11:04:18.663

At the bottom of the table, there is a pagination bar showing 'Records from 1 to 1', 'Page 1', and '25 rows per page'.

2. Click .
3. Click **My Workflow Queue**.

The My Workflow Queue page appears showing the workflow queues of the logged in user.

My Workflow Queue

Object Path : Object Name : Status Title : Object Definition :

Bulk Update : Off Workflow : Assigned Object : Status Title : Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwinDIS	Environment	erwin_DIS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:42
2	erwinDIS/erwin_DIS	Table	dbo.ADS_ASSOCIATIONS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
3	erwinDIS/erwin_DIS	Table	dbo.ADS_FORM		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
4	erwinDIS/erwin_DIS	Table	dbo.ADS_KEY_VALUE		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
5	erwinDIS/erwin_DIS	Table	dbo.ADS_KEY_VALUE_OBJECTS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
6	erwinDIS/erwin_DIS	Table	dbo.ADS_MM_VERSION		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
7	erwinDIS/erwin_DIS	Table	dbo.ADS_MODULES		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
8	erwinDIS/erwin_DIS	Table	dbo.ADS_OBJECT_CODESETS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
9	erwinDIS/erwin_DIS	Table	dbo.ADS_OBJECT_TO_OBJECT		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57

Records from 1 to 25 of 441

- Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking

The search results are displayed.

My Workflow Queue

Object Path : Object Name : Status Title : Object Definition :

Bulk Update : Off Workflow : Assigned Object : Status Title : Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwinDIS/erwin_DIS	Table	dbo.ADS_ASSOCIATIONS		Draft	Re-assignment.	Administrator	11/26/2019 12:10:02

Records from 1 to 1 of 1

- Click the required <Object Name> which appears as hyperlink.

The Table View page appears.

The screenshot shows a 'Table View' window with a 'Send To - Review' button in the top right. The window is divided into three sections: 'Technical Properties', 'Business Properties', and 'User Defined Fields'. The 'Technical Properties' section includes fields for Table Name (abc.ADS_ASSOCIATIONS), Environment Name (erwin_DIS), System Name (erwinDIS), No of Rows, Synonym Reference, FileType, XPath, and Workflow Status (Draft). The 'Business Properties' section includes Data Steward, Logical Table Name, Table Definition, Expanded Logical Name, Table Comments, Used In Gap Analysis (checked), Table Class, DQ Score, and Table Alias. The 'User Defined Fields' section shows two fields labeled 'User Defined-2' and 'User Defined-7'.

6. Click **Send To - <Next_Stage>** to move the object to the next stage of the workflow.

The Workflow Change Description page appears.

The screenshot shows a 'Workflow Change Description' window. It features a 'Comments' section with a text area containing the placeholder text 'Enter Change Description comments here'. At the bottom right of the window is an orange 'Save & Send' button.

7. Add relevant comments and click **Save & Send**.

The workflow status is updated to the <Title_Status> of next stage and the users with the assigned roles receive the work queue notification.



Each stage in the workflow is assigned to different roles. For example, if the Draft stage in the workflow was assigned to Mapping Admin role then, the users with the Mapping Admin role receive the work queue notification.

As the object moves through different stages, you can view the workflow log to see its workflow status. For more information on viewing the workflow logs of tables, refer to the [Viewing Workflow Logs of Tables](#) topic.

A table can be moved to different stages and finally, it can be published.

Assigning Workflows to the Columns

After creating, and configuring a workflow, you can assign the workflow to columns in Metadata Manager.

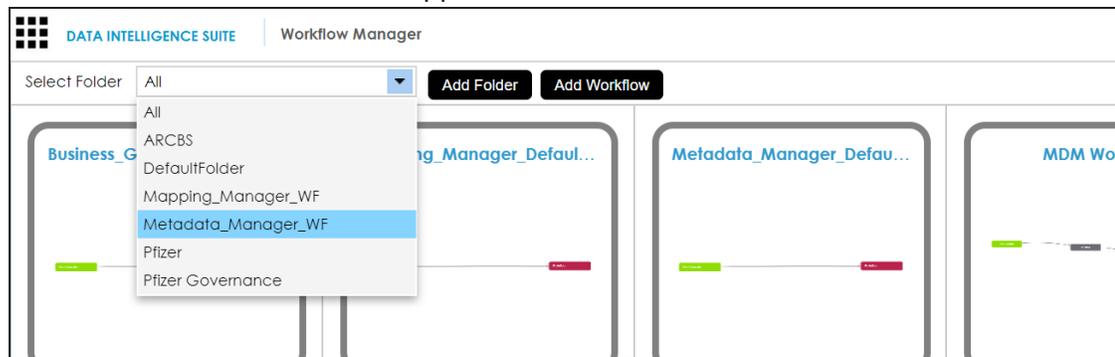
Before you assign workflows to columns:

- Ensure that you select **Metadata Manager** as module and **Column** as object while adding the workflow to the folder.
- The default workflow, Metadata_Manager_Default_Workflow is assigned to all the columns. Hence, you need to override the existing default workflow.

To assign workflows to columns, follow these steps:

1. In the **Workflow Manager** page, select a folder.

All the workflows in the folder appear.



2. Hover over the required workflow and click .

The Assign Workflow page appears.

#	Name	Created By	Created Date	Modified By	Modified Date	Options
	<input type="text"/>					

3. Click **New Assignment**.

The Assign To page appears.

Assign To
⌵ ⌵ ⌵

Save
Cancel

Assign To*

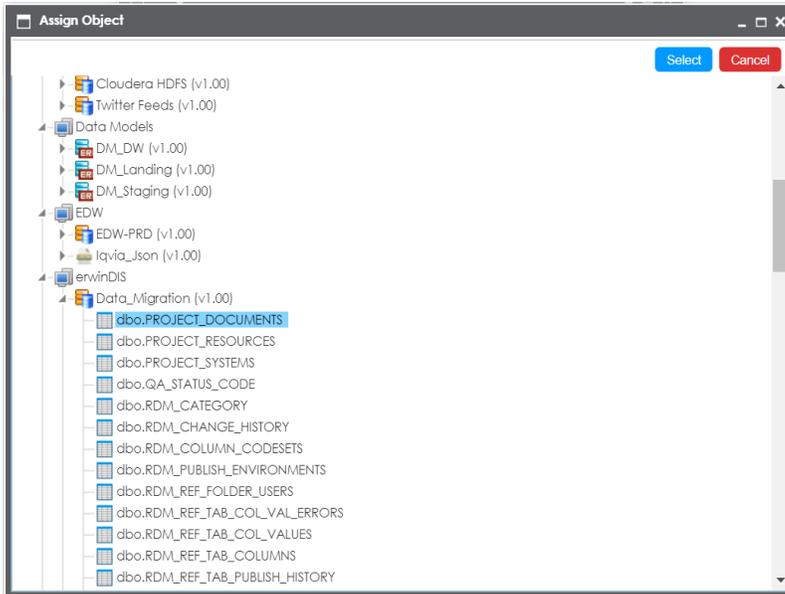
Status title *

Roles ⏻

- Select All
- Administrator
- ETL Developer
- Mapping Admin
- Mapping Designer
- Power User

4. In **Assign To** field, click .

The Assign Object page appears.

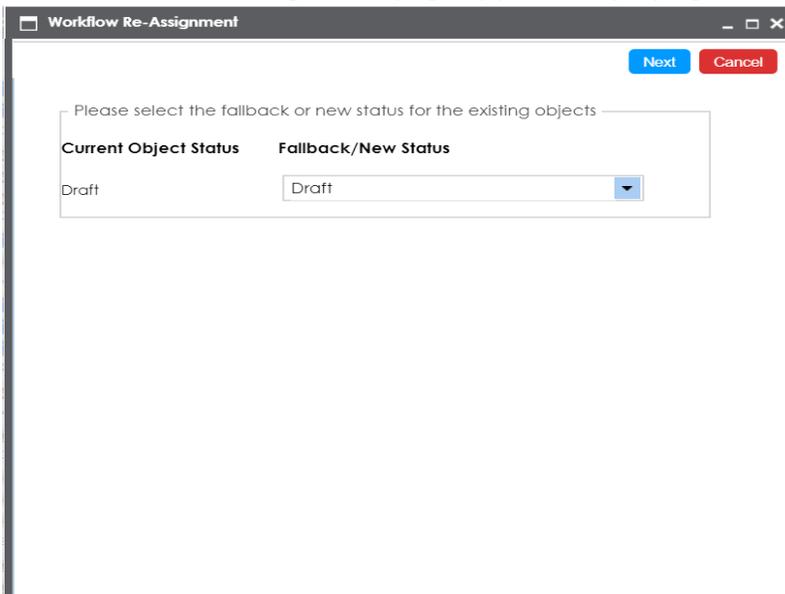


5. Select a table with necessary columns and click **Select**.

A warning message appears giving you an option to override the existing workflow.

6. Click **Yes** to override the existing workflow.

The Workflow Re-Assignment page appears displaying the Current Object Status.



7. Select the appropriate Fallback/New Status.

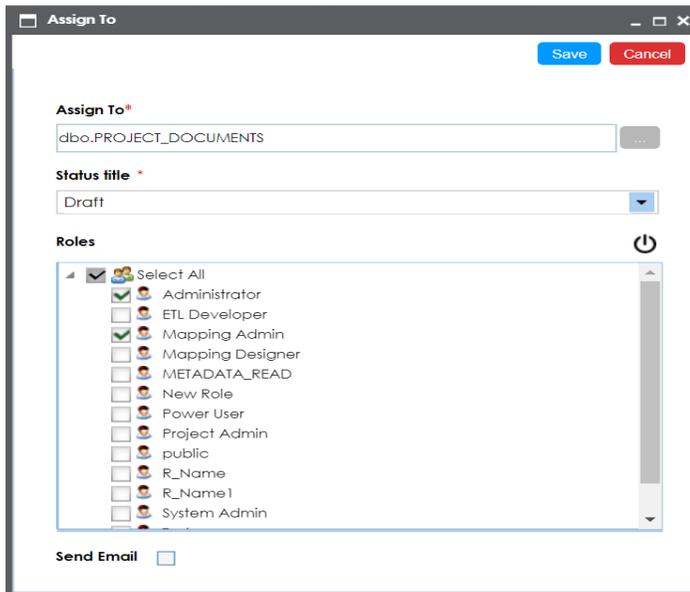
The options for Fallback/New Status depends on the [stages defined in the workflow](#).

8. Click **Next**.

The Comments page appears.

9. Enter relevant comments, and click .

The Assign To page re-appears with Assign To field filled.



The screenshot shows a dialog box titled "Assign To" with a "Save" button and a "Cancel" button. The "Assign To*" field contains the text "dbo.PROJECT_DOCUMENTS". The "Status title*" dropdown menu is set to "Draft". Below this is a "Roles" section with a refresh icon and a list of roles with checkboxes: "Select All" (checked), "Administrator" (checked), "ETL Developer" (unchecked), "Mapping Admin" (checked), "Mapping Designer" (unchecked), "METADATA_READ" (unchecked), "New Role" (unchecked), "Power User" (unchecked), "Project Admin" (unchecked), "public" (unchecked), "R_Name" (unchecked), "R_Name1" (unchecked), and "System Admin" (unchecked). At the bottom, there is a "Send Email" checkbox which is currently unchecked.

10. Select the **Status Title** from which the workflow starts.

A Status Title is assigned to a stage while creating the stage.

11. Select the appropriate **Roles**.

12. Select the **Send Email** check box to receive email notification.

13. Click **Save**.

The workflow is assigned to all the columns in the selected table.

Once the workflow is assigned successfully to the columns in the selected table, users who are part of the assigned roles will get work queue notifications. For more information on workflow execution, refer to the [Executing Workflows for Columns via Workflow Queue](#).

Executing Workflows for Columns

A workflow has different stages and each stage is assigned to different roles. The users with the assigned roles receive the work queue notifications as the object moves across the stages. They can enter relevant comments while moving the object to the next stage.

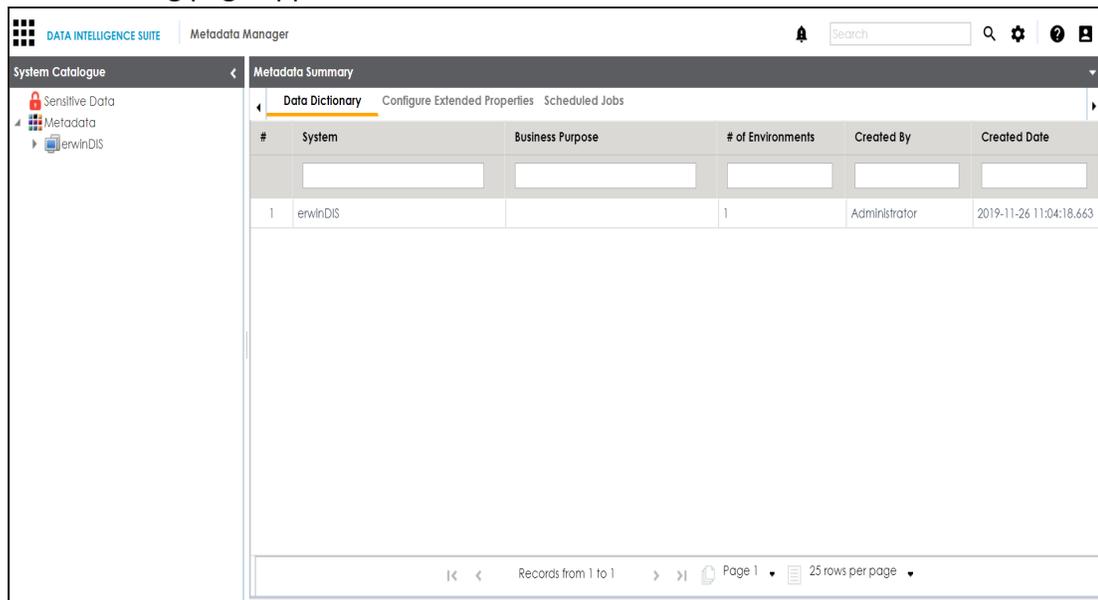
Executing workflows involves:

1. Receiving workflow queue notifications
2. Examining and moving the column to the next stage

To execute workflows for the columns in the Metadata Manager, follow these steps:

1. Go to **Application Menu > Data Catalog > Metadata Manager**.

The following page appears.



The screenshot shows the Metadata Manager interface. On the left is the System Catalogue with a tree view containing 'Sensitive Data', 'Metadata', and 'erwinDIS'. The main area displays the 'Metadata Summary' for 'erwinDIS', with tabs for 'Data Dictionary', 'Configure Extended Properties', and 'Scheduled Jobs'. A table lists metadata entries with the following data:

#	System	Business Purpose	# of Environments	Created By	Created Date
1	erwinDIS		1	Administrator	2019-11-26 11:04:18.663

At the bottom, there is a pagination control showing 'Records from 1 to 1', 'Page 1', and '25 rows per page'.

2. Click .
3. Click **My Workflow Queue**.

The My Workflow Queue page appears showing the workflow queues of the logged in user.

My Workflow Queue

Object Path : Object Name : Status Title : Object Definition :

Bulk Update : OFF Workflow : Assigned Object : Status Title : Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwinDIS	Environment	erwin_DIS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:42
2	erwinDIS/erwin_DIS	Table	dbo.ADS_ASSOCIATIONS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
3	erwinDIS/erwin_DIS	Table	dbo.ADS_FORM		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
4	erwinDIS/erwin_DIS	Table	dbo.ADS_KEY_VALUE		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
5	erwinDIS/erwin_DIS	Table	dbo.ADS_KEY_VALUE_OBJECTS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
6	erwinDIS/erwin_DIS	Table	dbo.ADS_MM_VERSION		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
7	erwinDIS/erwin_DIS	Table	dbo.ADS_MODULES		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
8	erwinDIS/erwin_DIS	Table	dbo.ADS_OBJECT_CODESETS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
9	erwinDIS/erwin_DIS	Table	dbo.ADS_OBJECT_TO_OBJECT		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57

Records from 1 to 25 of 441

- Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking

The search results are displayed.

My Workflow Queue

Object Path : Object Name : Status Title : Object Definition :

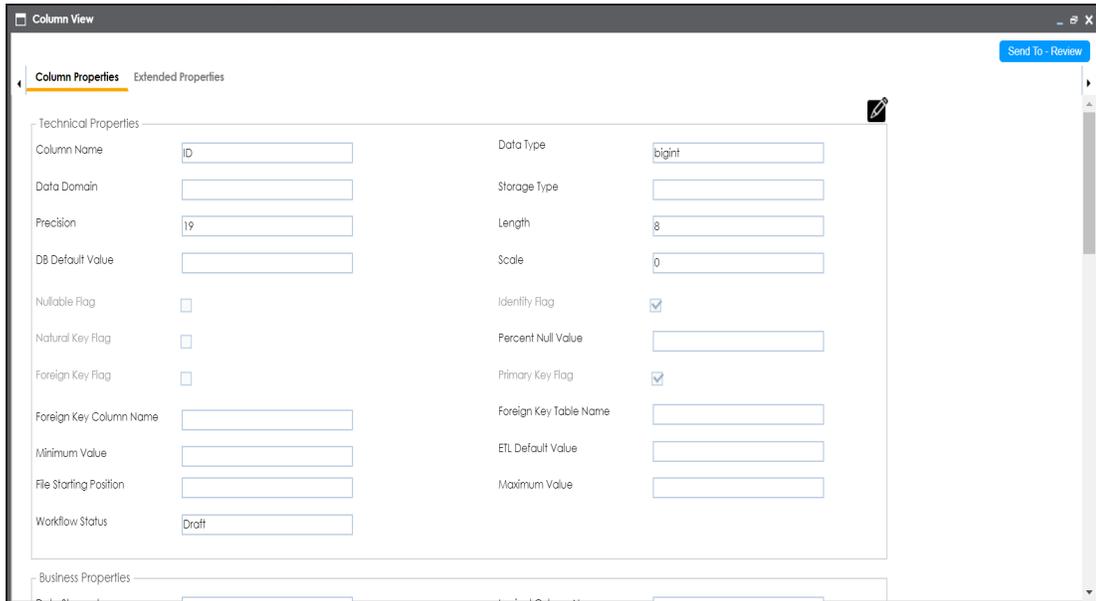
Bulk Update : OFF Workflow : Assigned Object : Status Title : Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwinDIS/erwin_DIS/dbo.ADS_ASSC	Column	ID		Draft	Workflow assignment.	Administrator	11/26/2019 12:53:04
2	erwinDIS/erwin_DIS/dbo.ADS_ASSC	Column	SOURCE_OBJECT_ID		Draft	Workflow assignment.	Administrator	11/26/2019 12:53:04
3	erwinDIS/erwin_DIS/dbo.ADS_ASSC	Column	SOURCE_OBJECT_TYPE_ID		Draft	Workflow assignment.	Administrator	11/26/2019 12:53:04
4	erwinDIS/erwin_DIS/dbo.ADS_ASSC	Column	TARGET_OBJECT_ID		Draft	Workflow assignment.	Administrator	11/26/2019 12:53:04
5	erwinDIS/erwin_DIS/dbo.ADS_ASSC	Column	TARGET_OBJECT_TYPE_ID		Draft	Workflow assignment.	Administrator	11/26/2019 12:53:04
6	erwinDIS/erwin_DIS/dbo.ADS_ASSC	Column	RELATIONSHIP_DETAIL_ID		Draft	Workflow assignment.	Administrator	11/26/2019 12:53:04
7	erwinDIS/erwin_DIS/dbo.ADS_FORI	Column	F_ID		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:59
8	erwinDIS/erwin_DIS/dbo.ADS_FORI	Column	BASE_FORM_ID		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:59
9	erwinDIS/erwin_DIS/dbo.ADS_KEY_	Column	KV_ID		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:59
10	erwinDIS/erwin_DIS/dbo.ADS_KEY_	Column	OBJECT_TYPE_ID		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:59
11	erwinDIS/erwin_DIS/dbo.ADS_KEY_	Column	OBJECT_ID		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:59

Records from 1 to 25 of 108

- Click the required <Object Name> which appears as hyperlink.

The Column View page appears.

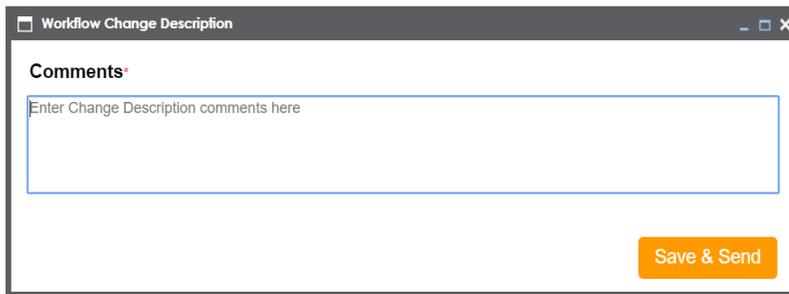


The screenshot shows a window titled "Column View" with a "Send To - Review" button in the top right. The main area is divided into "Technical Properties" and "Business Properties". Under "Technical Properties", the following fields are visible:

Property	Value
Column Name	ID
Data Domain	
Precision	19
DB Default Value	
Nullable Flag	<input type="checkbox"/>
Natural Key Flag	<input type="checkbox"/>
Foreign Key Flag	<input type="checkbox"/>
Foreign Key Column Name	
Minimum Value	
File Starting Position	
Workflow Status	Draft
Data Type	bigint
Storage Type	
Length	8
Scale	0
Identify Flag	<input checked="" type="checkbox"/>
Percent Null Value	
Primary Key Flag	<input checked="" type="checkbox"/>
Foreign Key Table Name	
ETL Default Value	
Maximum Value	

6. Click **Send To - <Next_Stage>** to move the object to the next stage of the workflow.

The Workflow Change Description page appears.



The screenshot shows a window titled "Workflow Change Description" with a "Comments" section. It contains a text area with the placeholder text "Enter Change Description comments here" and a "Save & Send" button in the bottom right corner.

7. Add relevant comments and click **Save & Send**.

The workflow status is updated to the <Title_Status> of next stage and the users with the assigned roles receive the work queue notification.



Each stage in the workflow is assigned to different roles. For example, if the Draft stage in the workflow was assigned to Mapping Admin role then, the users with the Mapping Admin role receive the work queue notification.

As the object moves through different stages, you can view the workflow log to see its workflow status. For more information on viewing the workflow logs of columns, refer to the [Viewing Workflow Logs of Columns](#) topic.

A column can be moved to different stages and finally, it can be published.

Managing Business Glossary Manager Workflows

You can create workflows for business glossary manager for three objects:

- Business terms
- Business rules
- Business policies

Creating and configuring business glossary manager workflows involves:

1. [Adding folders](#)
2. [Adding workflows](#)
3. [Configuring the Workflows](#)

After configuring generic workflows you can:

- [Assign it to business terms](#)
- [Assign it to business rules](#)
- [Assign it to business policies](#)

The workflow stages are assigned to different roles and the users assigned to those roles receive work queue notifications. The workflow can be executed via a workflow queue and the object moves across the different stages of the workflow.

Execution of business glossary manager workflows via workflow queue involves:

- [Executing workflows for business terms](#)
- [Executing workflows for business rules](#)
- [Executing workflows for business policies](#)

Assigning Workflows to Business Terms

After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to business term in the Business Glossary Manager.

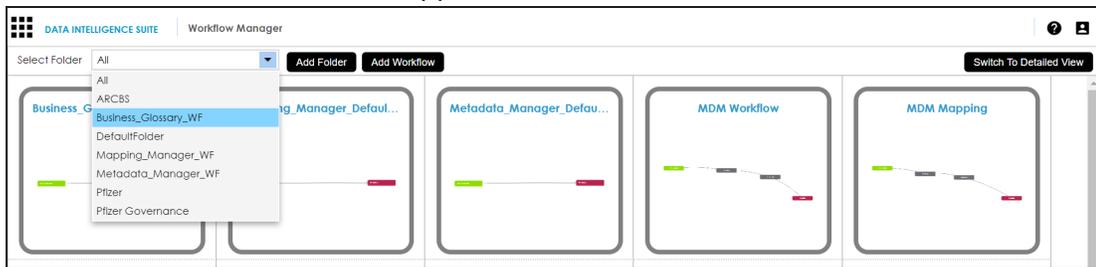
Before you assign workflows to business terms:

- Ensure that you choose **Business Glossary Manager** as a module and **Business Term** while adding the workflow to the folder.
- Note that the default workflow, Business_Glossary_Default_Workflow is assigned to all the business terms. Hence, you need to override the existing default workflow.

To assign workflows to business terms, follow these steps:

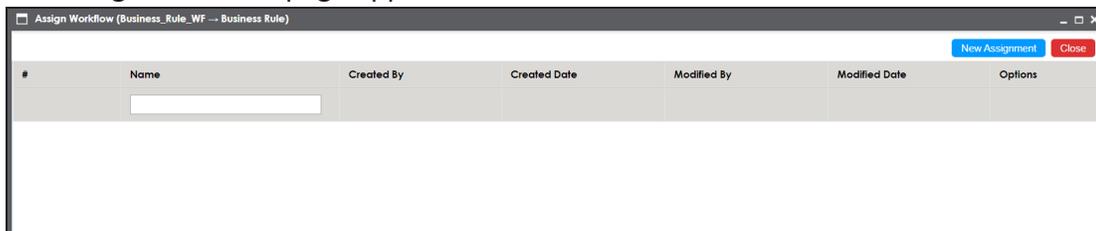
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



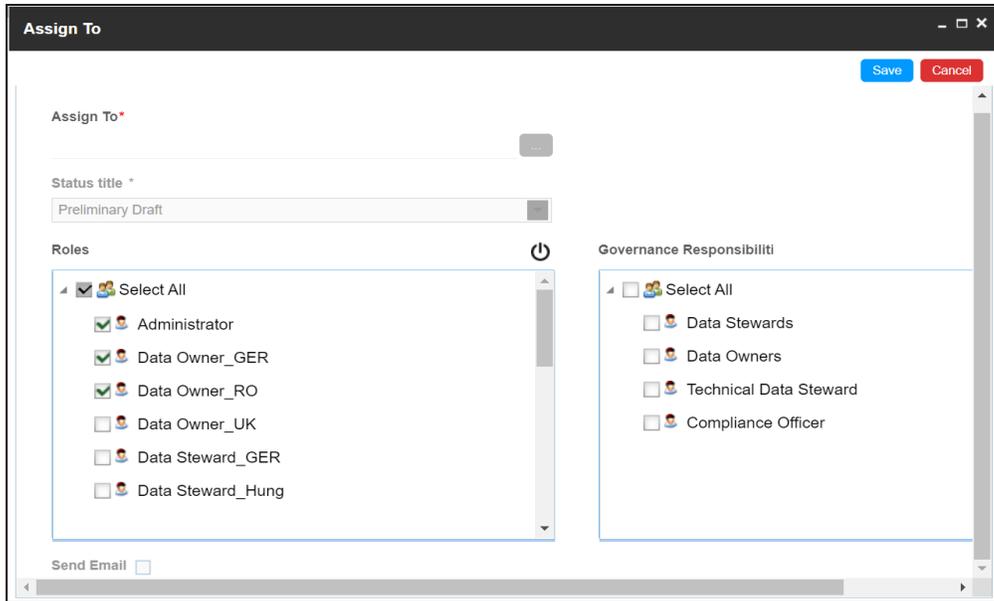
3. Hover over a workflow and click .

The Assign Workflow page appears.



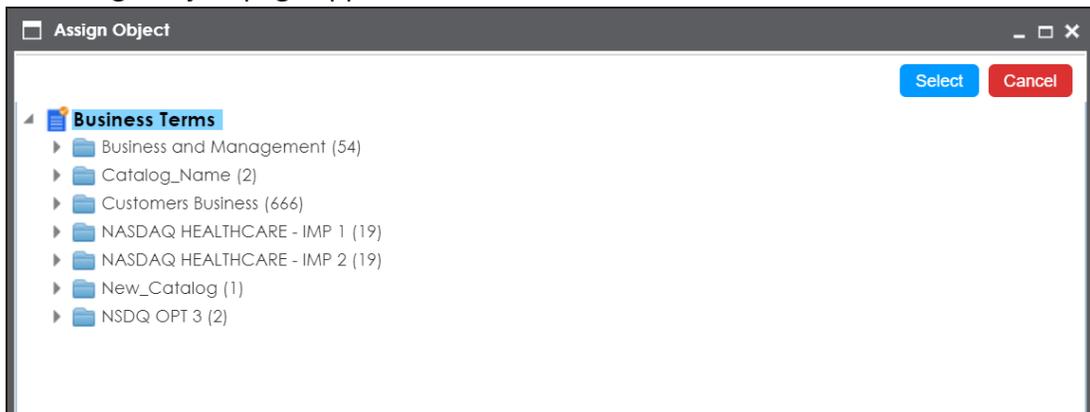
4. Click **New Assignment**.

The Assign To page appears.



5. In **Assign To** field, click .

The Assign Object page appears.

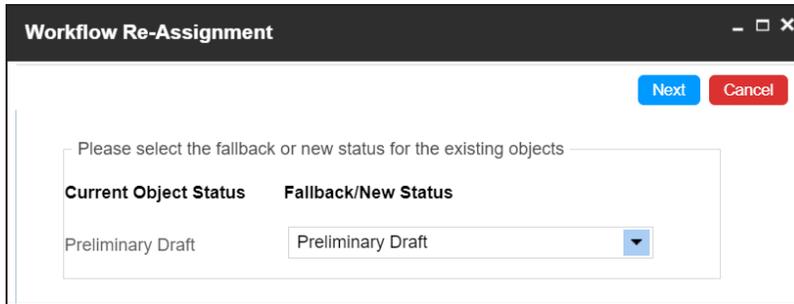


6. Select a catalog and click **Select**.

A warning message appears.

7. Click **Yes** to override the existing default workflow.

The Workflow Re-assignment page appears displaying the **Current Object Status** of all the business terms in the selected catalog and gives you option to select the Fallback/New Status of the business terms.



The screenshot shows a window titled "Workflow Re-Assignment" with standard window controls (minimize, maximize, close) in the top right corner. Below the title bar, there are two buttons: "Next" (blue) and "Cancel" (red). The main content area contains a text prompt: "Please select the fallback or new status for the existing objects". Below this prompt is a table with two columns: "Current Object Status" and "Fallback/New Status". The first row shows "Preliminary Draft" under the first column and a dropdown menu with "Preliminary Draft" selected under the second column.

8. Select an appropriate **Fallback/New Status**.

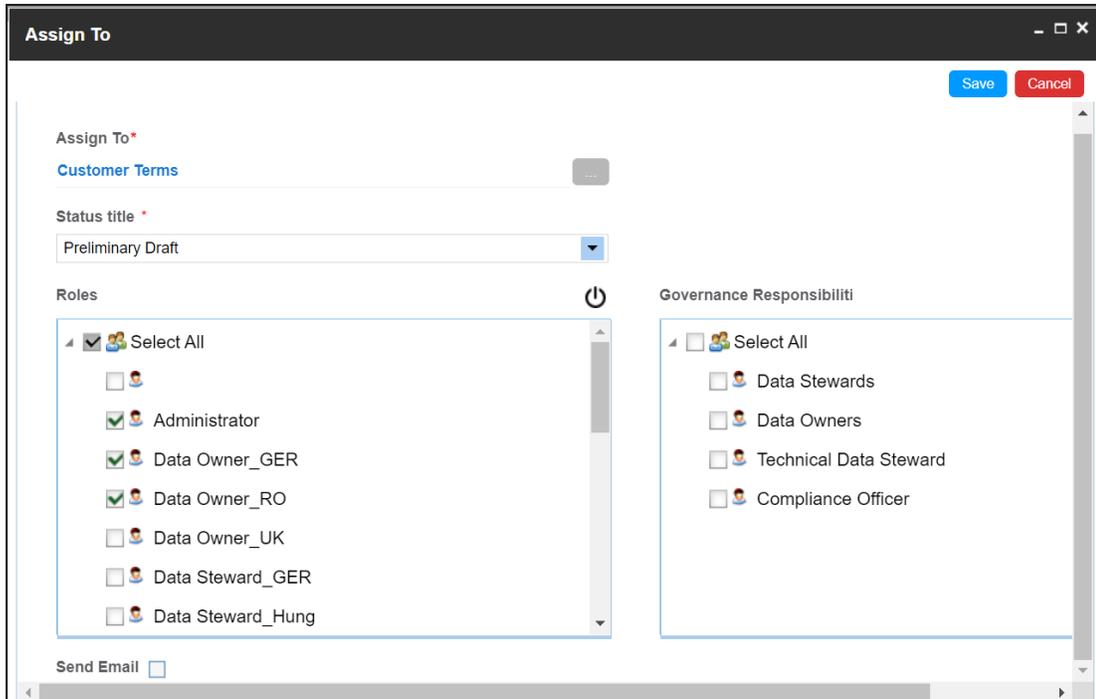
For example, if you select Preliminary Draft then the new status of business terms is set to Preliminary Draft.

9. Click **Next**.

The Comments page appear.

10. Enter relevant comments, and click .

The Assign To page re-appears with Assign To field filled.



You can update roles and roles group assigned to the new fall back stage and select **Send Email** check box to send email notifications about the assignment. These notifications are sent from administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

11. Click **Save**.

The workflow is assigned to the selected catalog in the Business Glossary Manager and it applies to all the business terms under the catalog.

Once the workflow is assigned successfully to a business term in business glossary manager, users who are part of the assigned roles will get work queue notifications. For more information on workflow execution via work queue notifications, refer to the [Executing Workflows for Business Terms via the Workflow Queue](#) topic.

Executing Workflows for Business Terms

A workflow assigned to a business term catalog is applicable to all the business terms under the catalog.

A workflow has different stages and each stage is assigned to different roles. The users with the assigned roles receive the work queue notifications as the object moves across the stages. They can enter relevant comments while moving the object to the next stage.

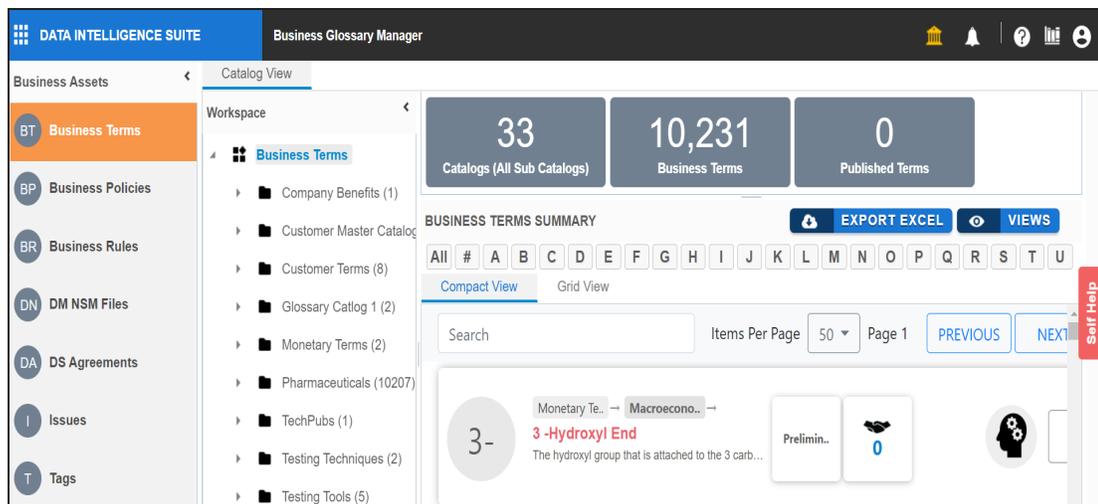
Executing workflows involves:

1. Receiving workflow queue notifications.
2. Examining and moving the business term to the next stage.

To execute workflows for the business terms, follow these steps:

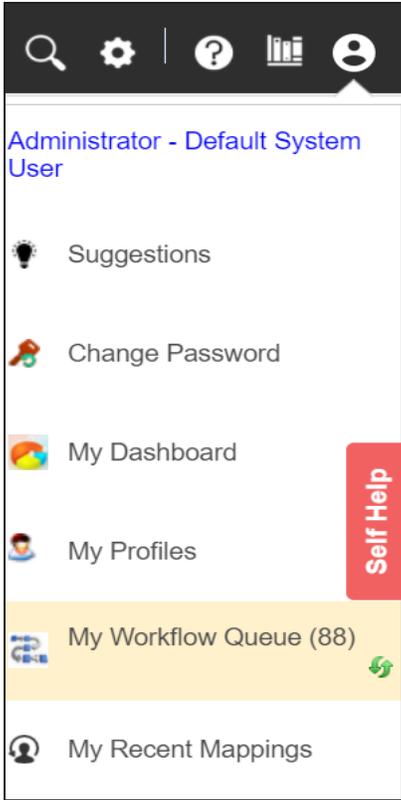
1. Go to **Application Menu > Data Literacy > Business Glossary Manager**.

The following page appears.



The screenshot displays the 'Business Glossary Manager' interface within the 'DATA INTELLIGENCE SUITE'. The main view is 'Catalog View' showing a list of business terms. Key statistics are displayed: 33 Catalogs (All Sub Catalogs), 10,231 Business Terms, and 0 Published Terms. A 'BUSINESS TERMS SUMMARY' section includes an 'EXPORT EXCEL' button and a 'VIEWS' dropdown. Below this is a search bar and pagination controls (Items Per Page: 50, Page 1, PREVIOUS, NEXT). A detailed view of a business term is shown, including a chemical structure '3-Hydroxyl End' and a description: 'The hydroxyl group that is attached to the 3 carb...'. A 'Prelimin...' button and a '0' indicator are also visible. A 'Self Help' button is located on the right side of the interface.

2. Click .



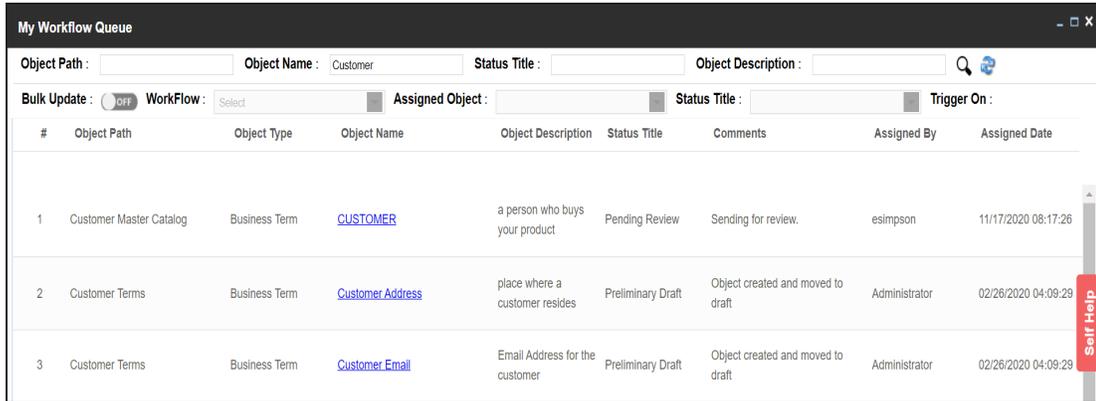
3. Click **My Workflow Queue**.

The My Workflow Queue page appears. It displays workflow queues.

#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
2	Customer Catalog Management/Metadata Manager	Business Term	Beta Testing	engine testing (read the first phase of testing in a software development process. The first phase includes unit testing, component testing, and system testing. Beta testing can be considered a pre-release testing.	Preliminary Draft	Object created and moved to Draft	Administrator	06/11/2020 09:46:34
3	Customer Master Catalog	Business Term	CURRENCY	COD Currency	Preliminary Draft	Assigning new workflow.	Administrator	11/17/2020 08:10:52
4	Customer Master Catalog	Business Term	CUSTOMER	a person who buys your product	Pending Review	Sending for review.	esimpson	11/17/2020 08:17:26

4. Search the required object. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

The search result appears.

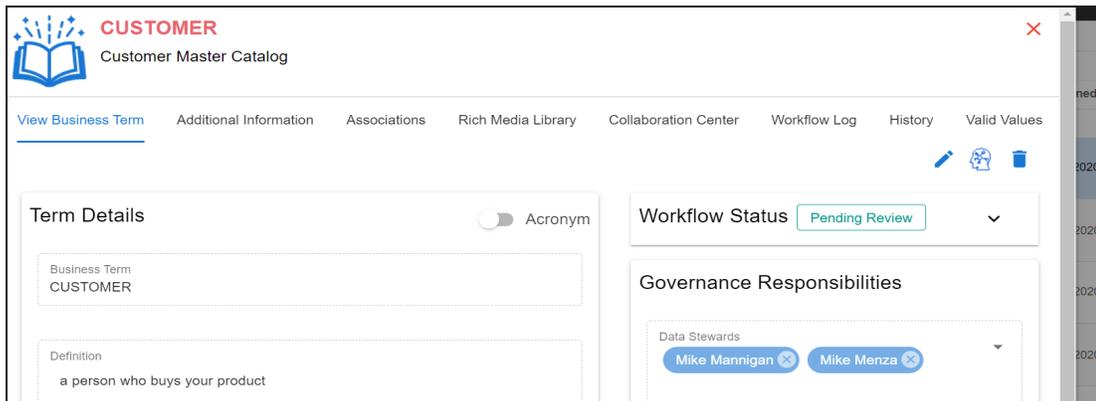


The screenshot shows a 'My Workflow Queue' window with search filters and a table of workflow items. The search filters include Object Path, Object Name (set to 'Customer'), Status Title, and Object Description. Below the filters are controls for Bulk Update (set to 'Off'), Workflow (set to 'Select'), Assigned Object, Status Title, and Trigger On. The table below lists three items:

#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Customer Master Catalog	Business Term	CUSTOMER	a person who buys your product	Pending Review	Sending for review.	esimpson	11/17/2020 08:17:26
2	Customer Terms	Business Term	Customer Address	place where a customer resides	Preliminary Draft	Object created and moved to draft	Administrator	02/26/2020 04:09:29
3	Customer Terms	Business Term	Customer Email	Email Address for the customer	Preliminary Draft	Object created and moved to draft	Administrator	02/26/2020 04:09:29

5. Click the <Object_Name> appearing as a hyperlink.

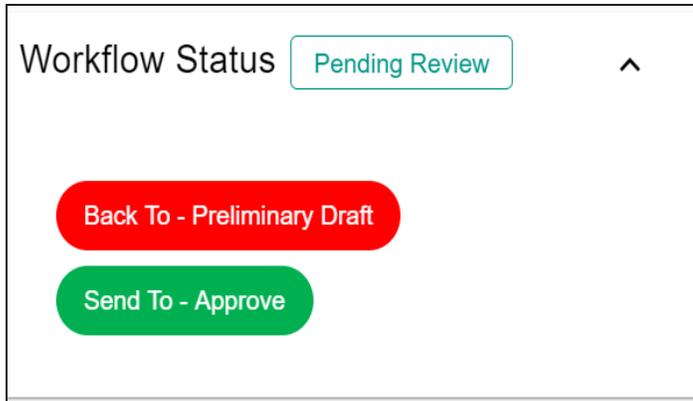
The <Business_Term> page appears.



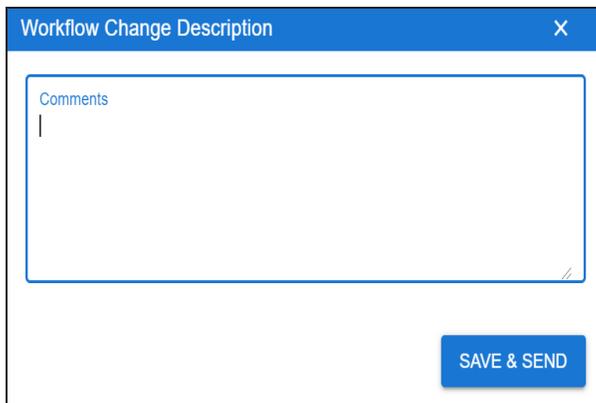
The screenshot shows the 'CUSTOMER' Business Term page. The page title is 'CUSTOMER' and the subtitle is 'Customer Master Catalog'. There are navigation tabs: 'View Business Term' (selected), 'Additional Information', 'Associations', 'Rich Media Library', 'Collaboration Center', 'Workflow Log', 'History', and 'Valid Values'. The main content area is divided into two sections: 'Term Details' and 'Workflow Status'. The 'Term Details' section includes a toggle for 'Acronym' and a text box containing 'CUSTOMER'. The 'Definition' section contains the text 'a person who buys your product'. The 'Workflow Status' section shows a dropdown menu currently set to 'Pending Review'. Below this, the 'Governance Responsibilities' section lists 'Data Stewards' as 'Mike Mannigan' and 'Mike Menza', each with a close button.

6. Click the **Workflow Status** drop down.

The available options appear. These options depend on the stages of the assigned workflow.



7. Click **Send To - <Next_Stage>** to move the object to the next stage of the workflow.
The Workflow Change Description page appears.



8. Enter comments.
9. Click **Save & Send**.

The workflow status is updated to the <Title_Status> of next stage and the users with the assigned roles receive the work queue notification.



Each stage in the workflow is assigned to different roles. For example, if the Draft stage in the workflow was assigned to Mapping Admin role then, the users with the Mapping Admin role receive the work queue notification.

As the object moves through different stages, you can view the workflow log to see its workflow status. For more information on viewing the workflow logs of business terms, refer to the [Viewing Workflow Logs](#) topic.

A business term can be moved to different stages and finally, it can be published.

Assigning Workflows to Business Rules

After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to business rules in the Business Glossary Manager.

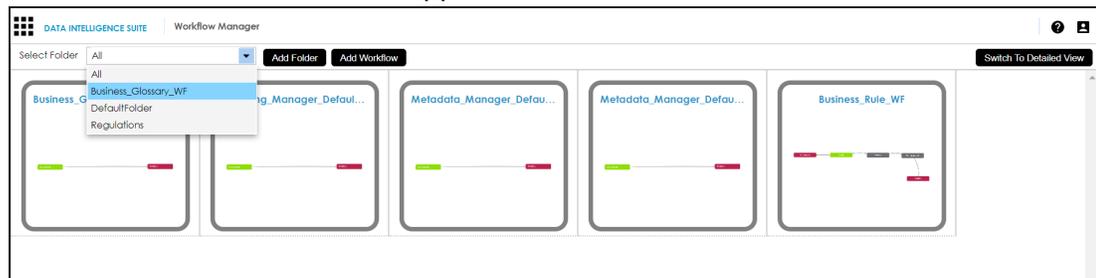
Before you assign workflows to business rules:

- Ensure that you choose **Business Glossary Manager** as a module and **Business Rule** while adding the workflow to the folder.
- Ensure that you assign the workflow to the business rule catalog before creating the business rule.
- Note that the workflow assigned to a business rule catalog applies to all the business rule under the catalog.

To assign workflows to business rules, follow these steps:

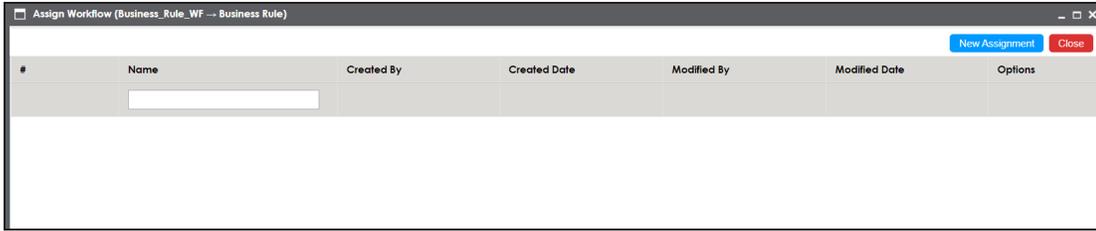
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. In the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



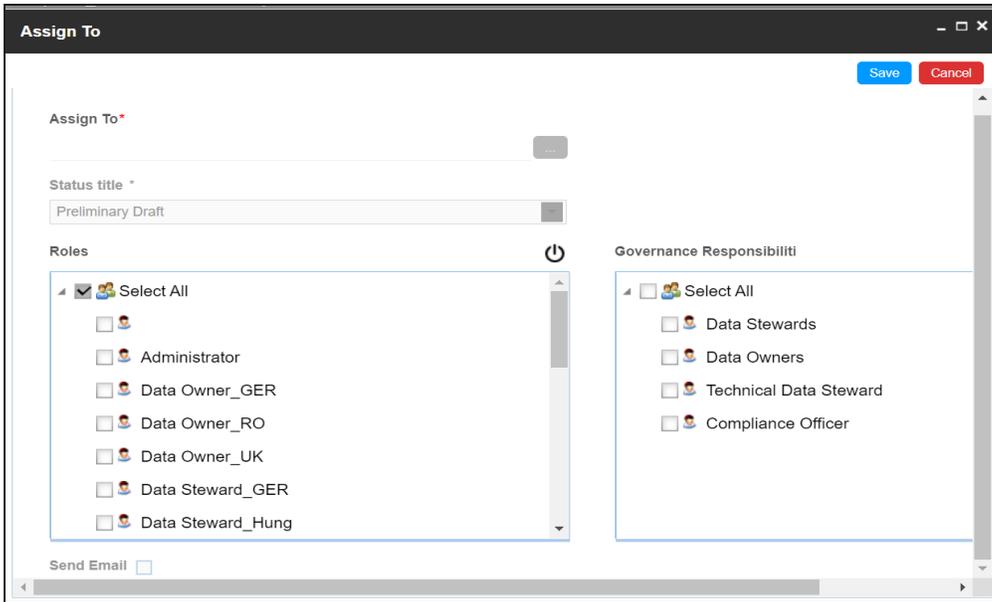
3. Hover over a workflow and click .

The Assign Workflow page appears.



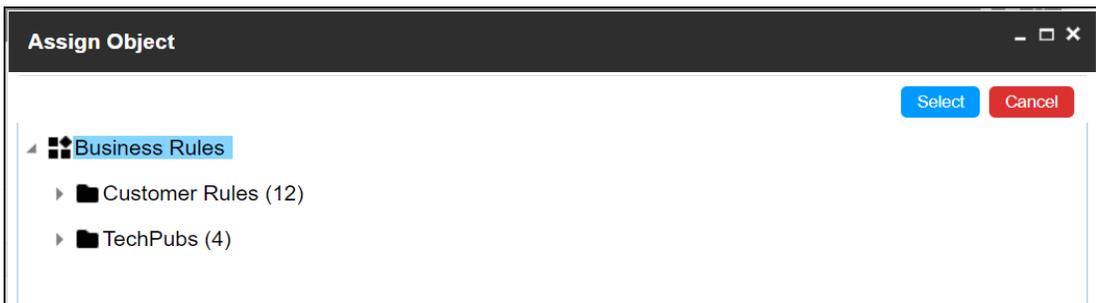
4. Click **New Assignment**.

The Assign To page appears.



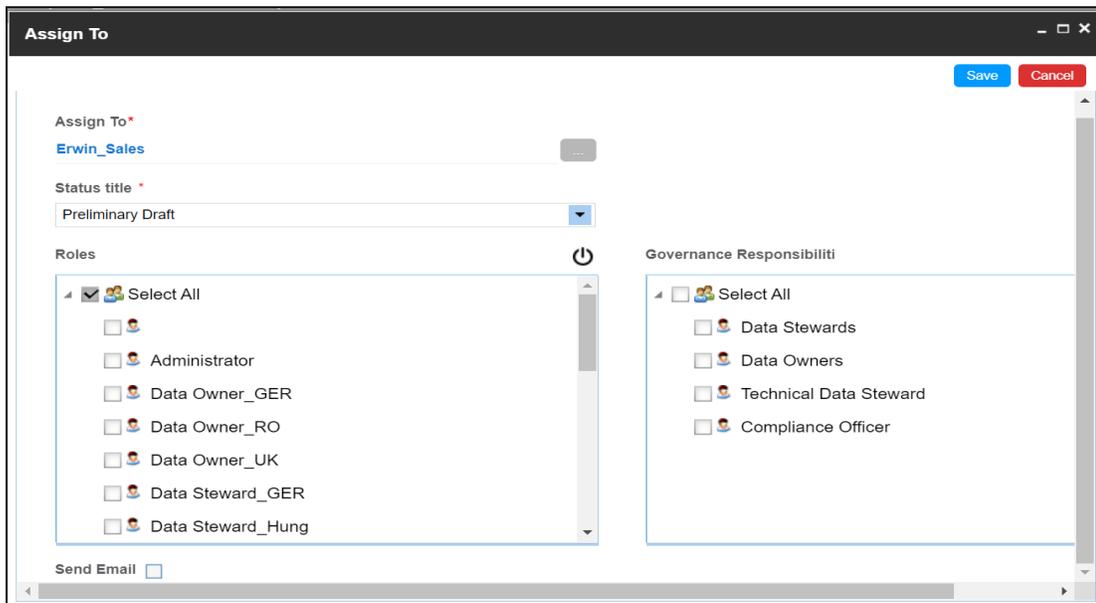
5. In the **Assign To** field, click .

The Assign Object page appears.



6. Select a catalog and click **Select**.

The Assign To page re-appears with Assign To field filled.



You can update roles and roles group assigned to the first stage and select **Send Email** check box to send email notifications about the assignment. These notifications are sent from administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

7. Click **Save**.

The workflow is assigned to the selected catalog in the Business Glossary Manager and it applies to all the business rules under the catalog.

Once a workflow is assigned successfully to a business rule in the Business Glossary Manager, users who are part of the assigned roles will get work queue notifications. For more information on the workflow execution via work queue notifications, refer to the [Executing Workflows for Business Rules via the Workflow Queue](#) topic.

Executing Workflows for Business Rules

You should assign a workflow to the business rule catalog before creating business rules under it. The workflow assigned to the business rule catalog is applicable to all the business

rules created under it.

A workflow has different stages and each stage is assigned to different roles. The users with the assigned roles receive the work queue notifications as the object moves across the stages. They can enter relevant comments while moving the object to the next stage.

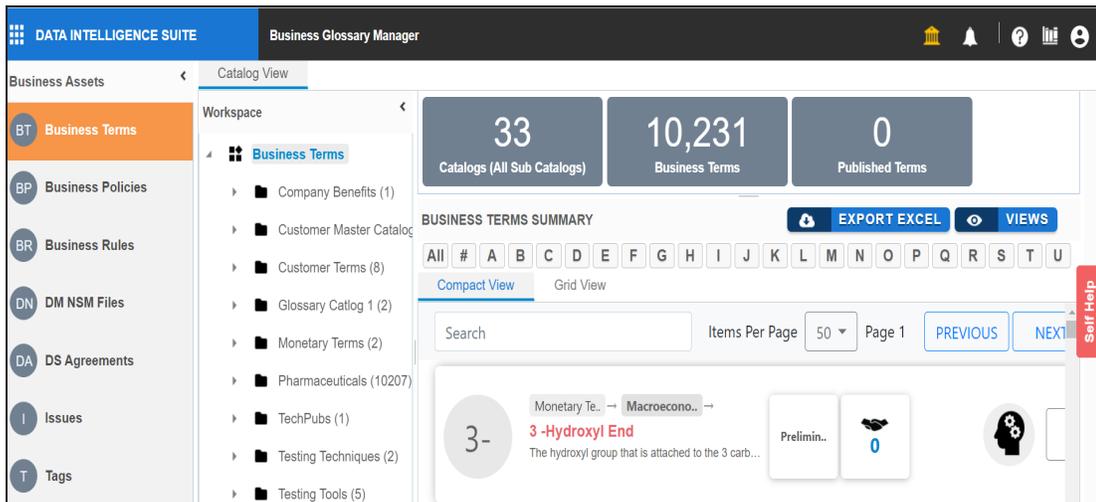
Executing workflows involves:

1. Receiving workflow queue notifications
2. Examining and moving the business rules to the next stage

Once the workflow is assigned to the business rule, it can be executed via the Workflow Queue.

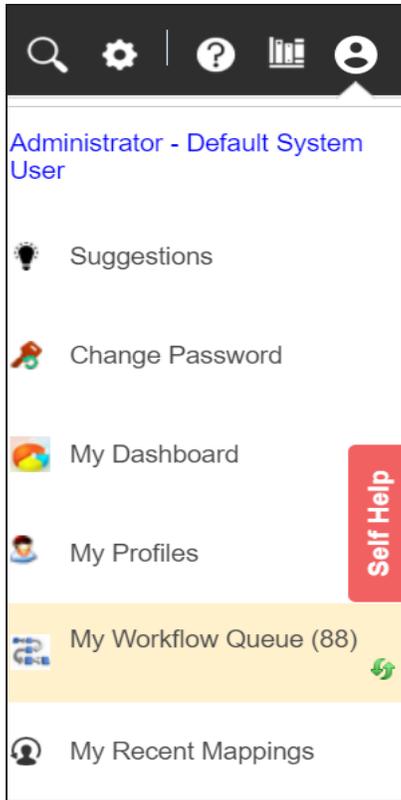
To execute workflows for business rules, follow these steps:

1. Go to **Application Menu > Data Literacy > Business Glossary Manager**.



2. Click .

The available options appear.



3. Click **My Workflow Queue**.

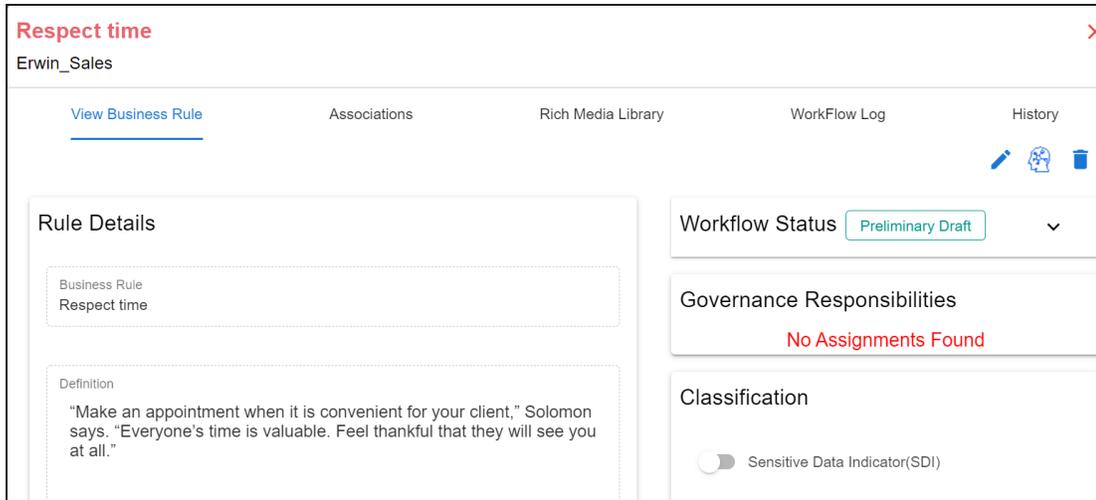
The My Workflow Queue page appears. It displays workflow queues.

You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

My Workflow Queue								
Object Path :		Object Name : <input type="text" value="Respect Time"/>		Status Title :		Object Description : <input type="text"/>		
Bulk Update : <input type="checkbox"/> Off		Workflow : <input type="text" value="Select"/>		Assigned Object :		Status Title : <input type="text"/>		
Trigger On :								
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Erwin_Sales	Business Rule	Respect time		Preliminary Draft	Object created and moved to Draft	Administrator	11/17/2020 12:27:45

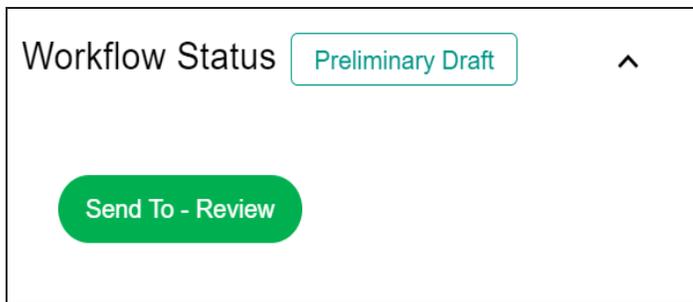
4. Click the <Object Name> appearing as a hyperlink.

The <Business_Rule> page appears.

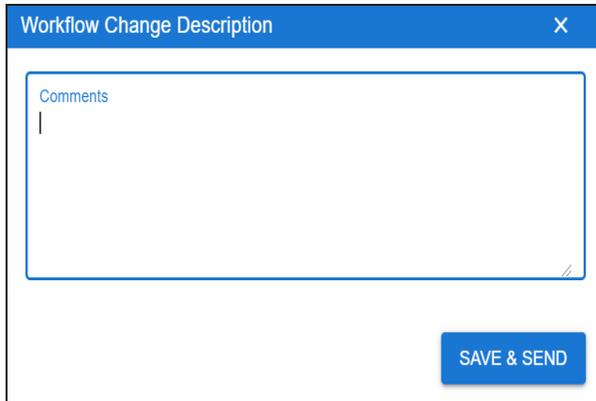


5. Click the **Workflow Status** drop down.

The available options appear. These options depend on the stages of the assigned workflow.



6. Click **Send To - <Next_Stage>** to move the object to the next stage of the workflow.
The Workflow Change Description page appears.



7. Enter change description comments.
8. Click **Save & Send**.

The workflow status is updated to the <Title_Status> of next stage and the users with the assigned roles receive the work queue notification.



Each stage in the workflow is assigned to different roles. For example, if the Draft stage in the workflow was assigned to Mapping Admin role then, the users with the Mapping Admin role receive the work queue notification.

As the object moves through different stages, you can view the workflow log to see its workflow status. For more information on viewing the workflow logs of business rules, refer to the [Viewing Workflow Logs](#) topic.

A business rule can be moved to different stages and finally, it can be published.

Assigning Workflows to Business Policies

After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to business policies in the Business Glossary Manager.

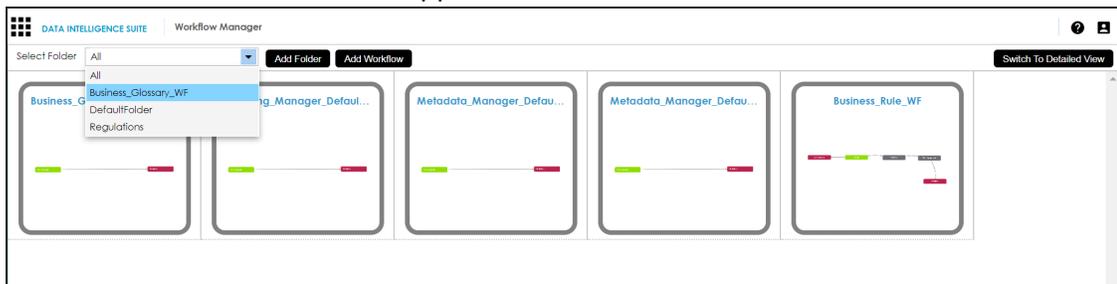
Before you assign workflows to business policies:

- Ensure that you choose **Business Glossary Manager** as a module and **Business Policy** while adding the workflow to the folder.

- Ensure that you assign the workflow to a business policy catalog before creating business policy.
- Note that the workflow assigned to a business policy catalog applies to all the business policies under the catalog.

To assign workflows to business policies, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. In the **Workflow Manager** page, select a folder.
All the workflows in the folder appears.



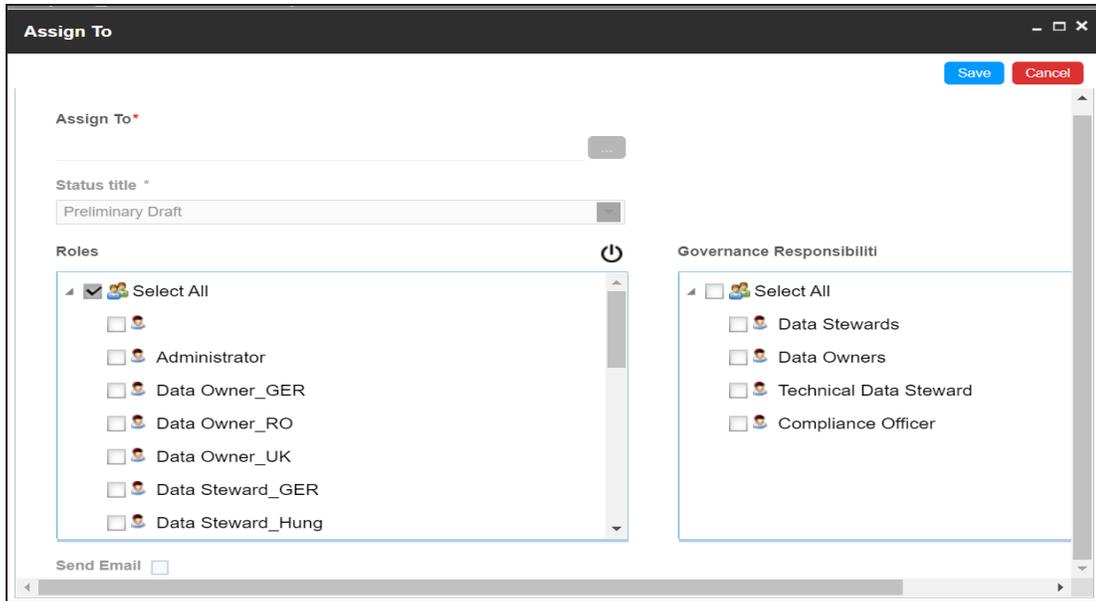
3. Hover over a workflow and click .

The Assign Workflow page appears.



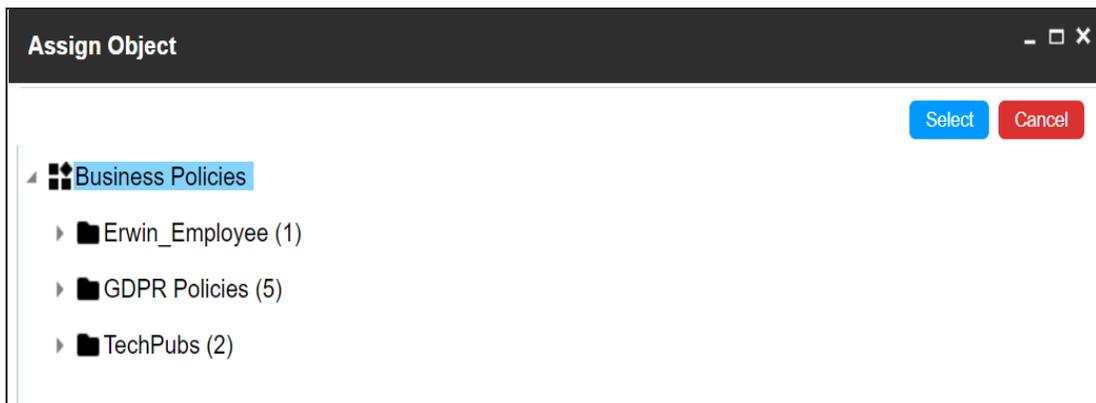
4. Click **New Assignment**.

The Assign To page appears.



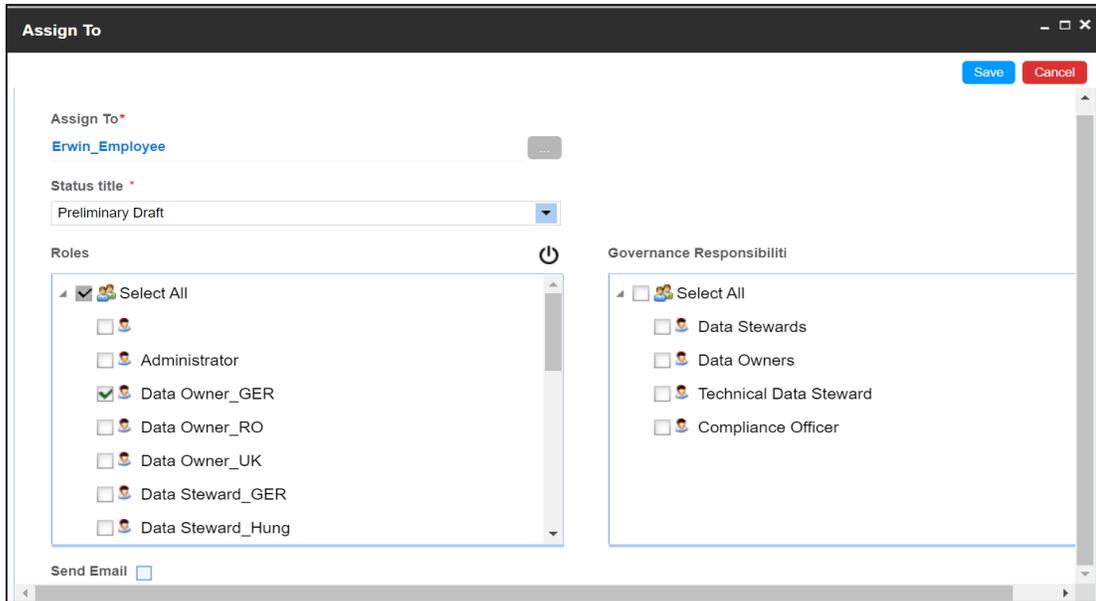
5. In the **Assign To** field, click .

The Assign Object page appears.



6. Click a catalog and then click **Select**.

The Assign To page re-appears with Assign To field filled.



You can update roles and roles group assigned to the first stage and select **Send Email** check box to send email notifications about the assignment. These notifications are sent from administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

7. Click **Save**.

The workflow is assigned to the selected catalog in the Business Glossary Manager and it applies to all the business policies under the catalog.

Once a workflow is assigned successfully to a business policy in business glossary manager, users who are part of the assigned roles will get work queue notifications. For more information on workflow execution via work queue notifications, refer to the [Executing Workflows for Business Policies via the Workflow Queue](#) topic.

Executing Workflows for Business Policies

You should assign the workflow to the business policy catalog before creating business policies under it. The workflow assigned to the business policy catalog is applicable to all the business policies created under it.

A workflow has different stages and each stage is assigned to different roles. The users with the assigned roles receive the work queue notifications as the object moves across the stages. They can enter relevant comments while moving the object to the next stage.

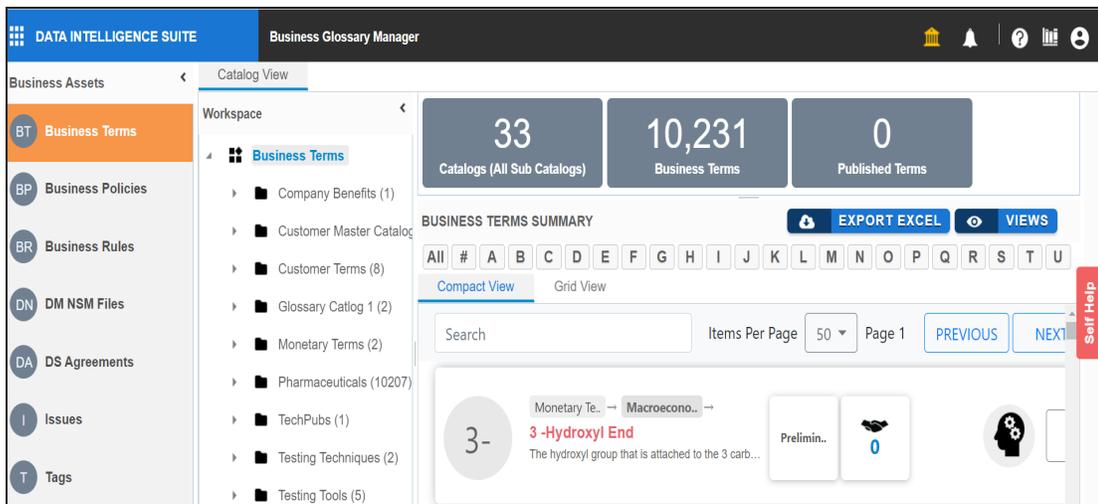
Once the workflow is assigned to the business policy, it can be executed via the Workflow Queue.

Executing workflows involves:

1. Receiving workflow queue notifications
2. Examining and moving the business policy to the next stage

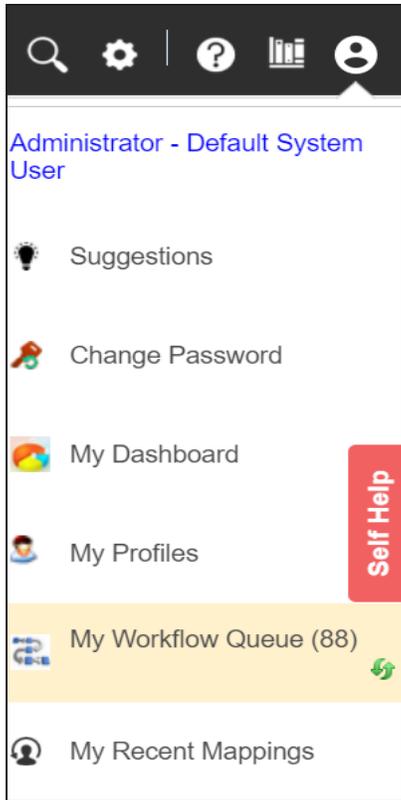
To execute workflows for business policies, follow these steps:

1. Go to **Application Menu > Data Literacy > Business Glossary Manager**.



2. Click .

The available options appear.



3. Click **My Workflow Queue**.

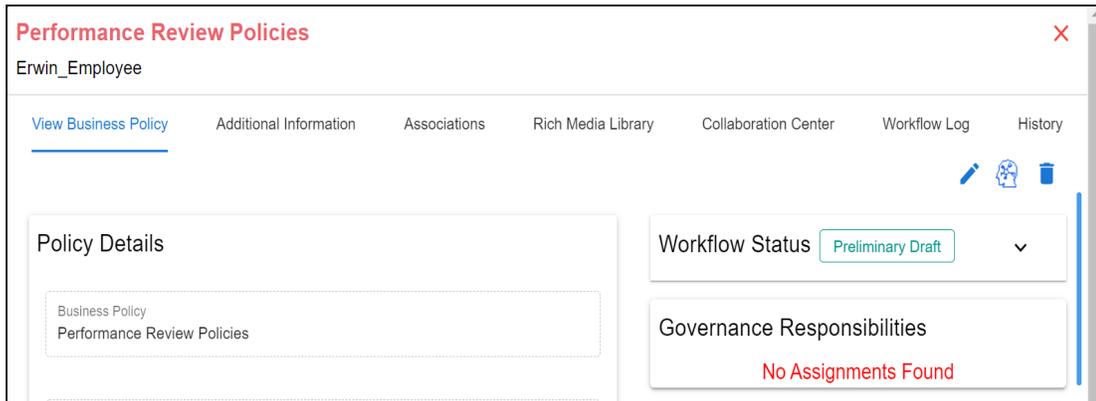
The My Workflow Queue page appears showing workflow queues of the logged in user.

You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

My Workflow Queue								
Object Path :		Object Name : Performance review policies		Status Title :		Object Description :		
Bulk Update : OFF		WorkFlow : Select		Assigned Object :		Status Title :		
Trigger On :								
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Erwin_Employee	Business Policy	Performance Review Policies		Preliminary Draft	Object created and moved to Draft	Administrator	11/17/2020 13:35:10

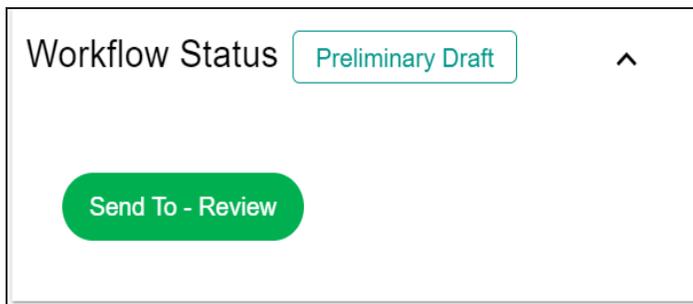
4. Click the **<Object Name>** appearing as a hyperlink.

The <Business_Policy> page appears.



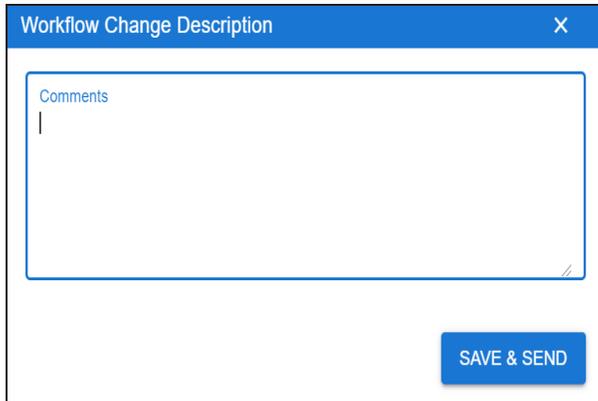
5. Click the **Workflow Status** drop down.

The available options appear. These options depend on the stages of the assigned workflow.



6. Click **Send To - <Next_Stage>** to move the object to the next stage of the workflow.

The Workflow Change Description page appears.



7. Enter change description comments.
8. Click **Save & Send**.

The workflow status is updated to the <Title_Status> of next stage and the users with the assigned roles receive the work queue notification.



Each stage in the workflow is assigned to different roles. For example, if the Draft stage in the workflow was assigned to Mapping Admin role then, the users with the Mapping Admin role receive the work queue notification.

In the same manner you can move the object to different stages and finally publish the object. The updated [workflow status can be viewed in the Business Glossary Manager](#).