the data governance company

erwin Data Intelligence Suite

Workflow Management Guide

Release v10.2

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Contents

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.

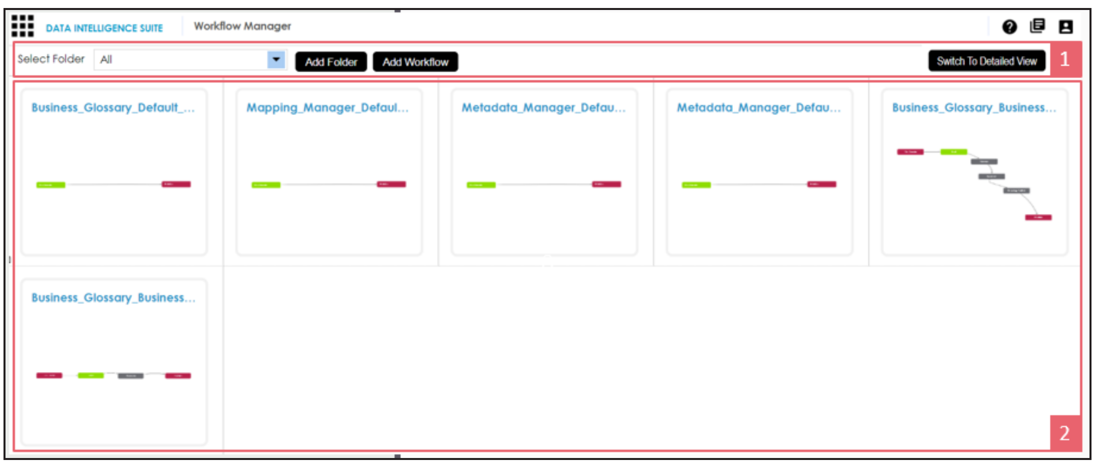
Also, you can create a collection of workflows and assign those workflows to any module based on the requirement.

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: ▪ Select folders ▪ Add folders ▪ Add workflows

UI Section	Function
	▪ 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

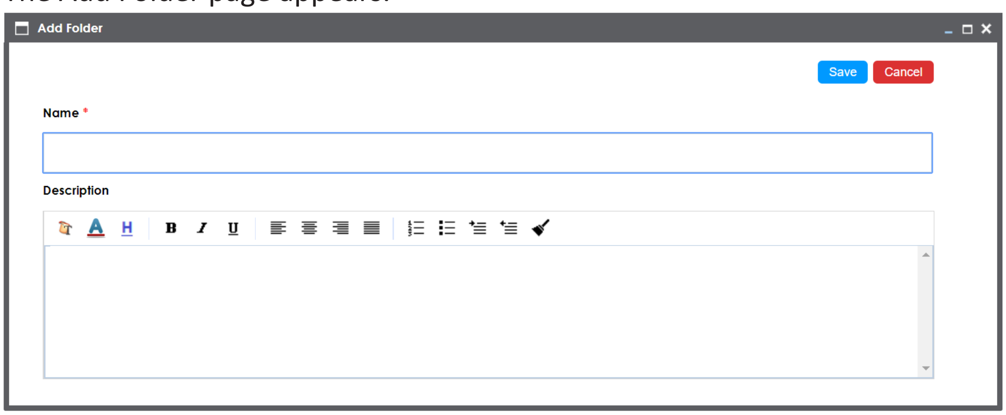
Adding Folders

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.

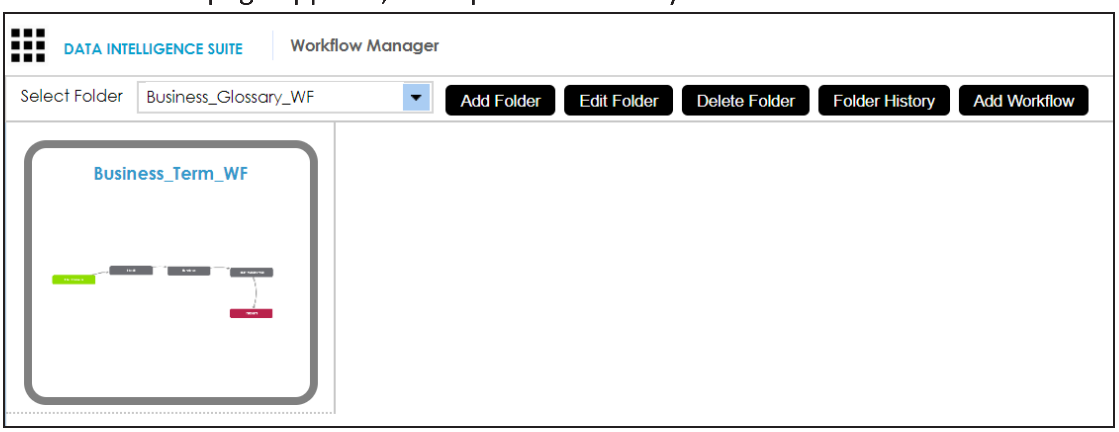
Once a folder is created, you can:

- 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.



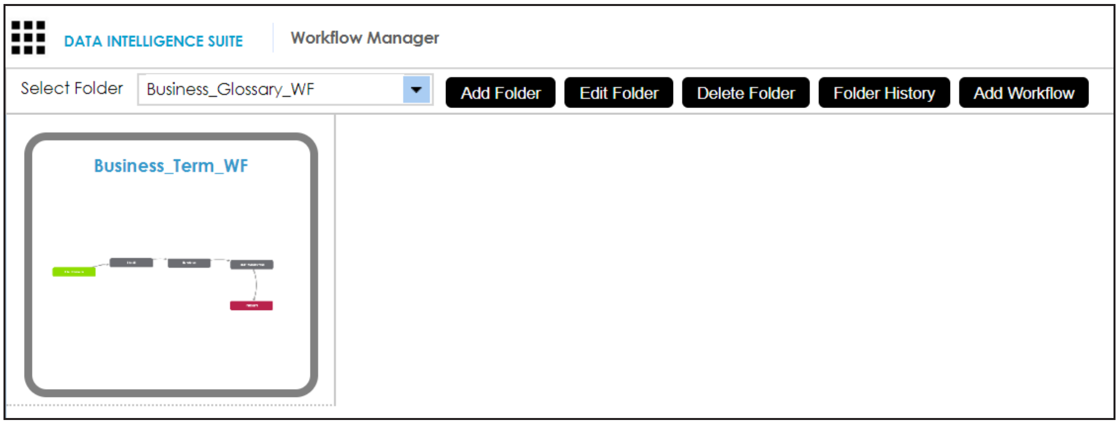
3. Click **Save**.

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

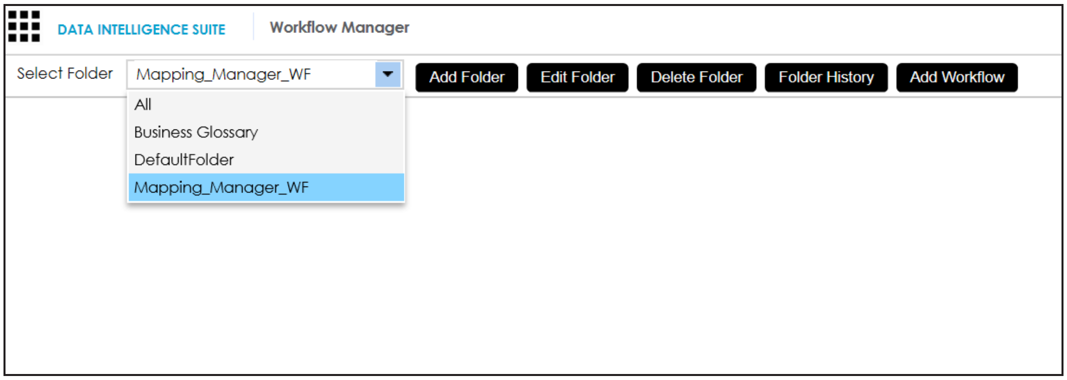
You can create workflows and add them to a folder.

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:

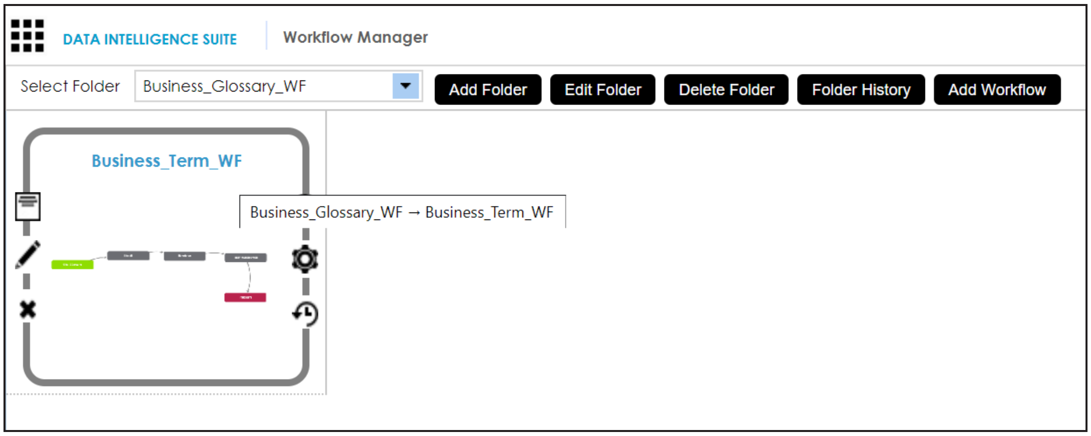
   - Configure workflows
   - Edit workflows
   - Delete workflows

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.

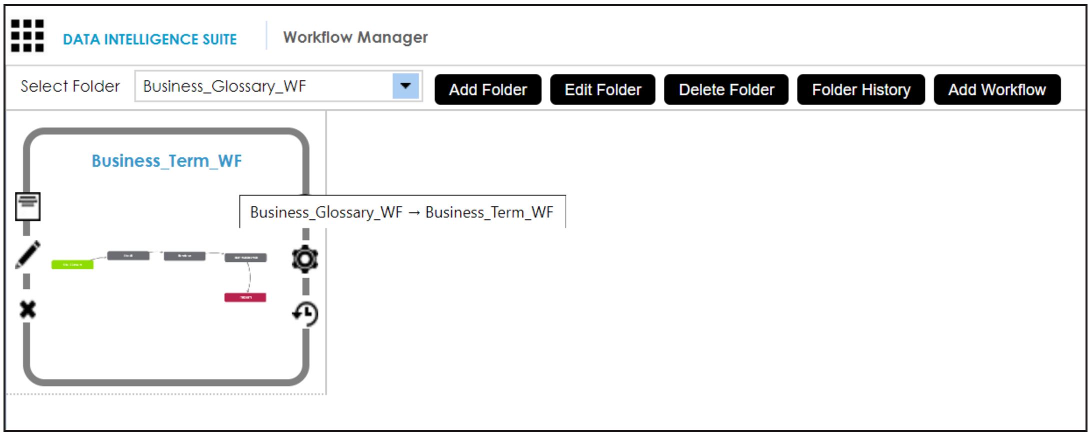
5. Update other necessary fields and click **Save**.
   The workflow is updated.

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

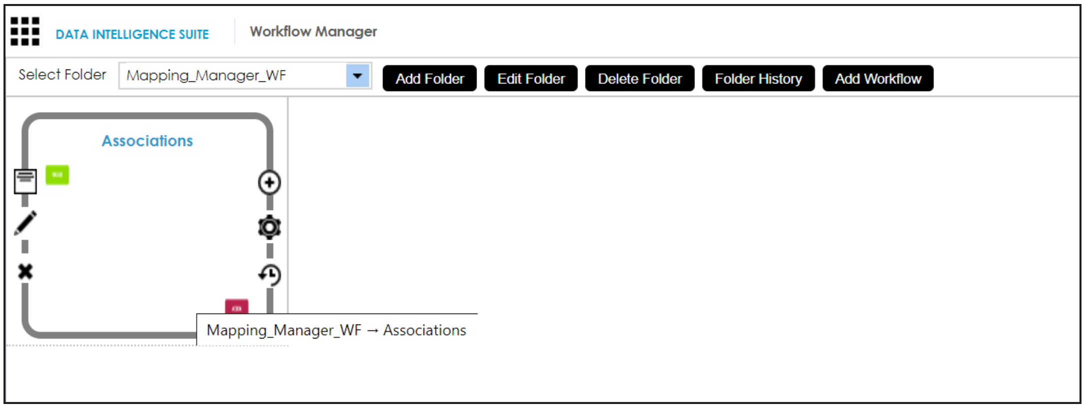
Configuring Workflows

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

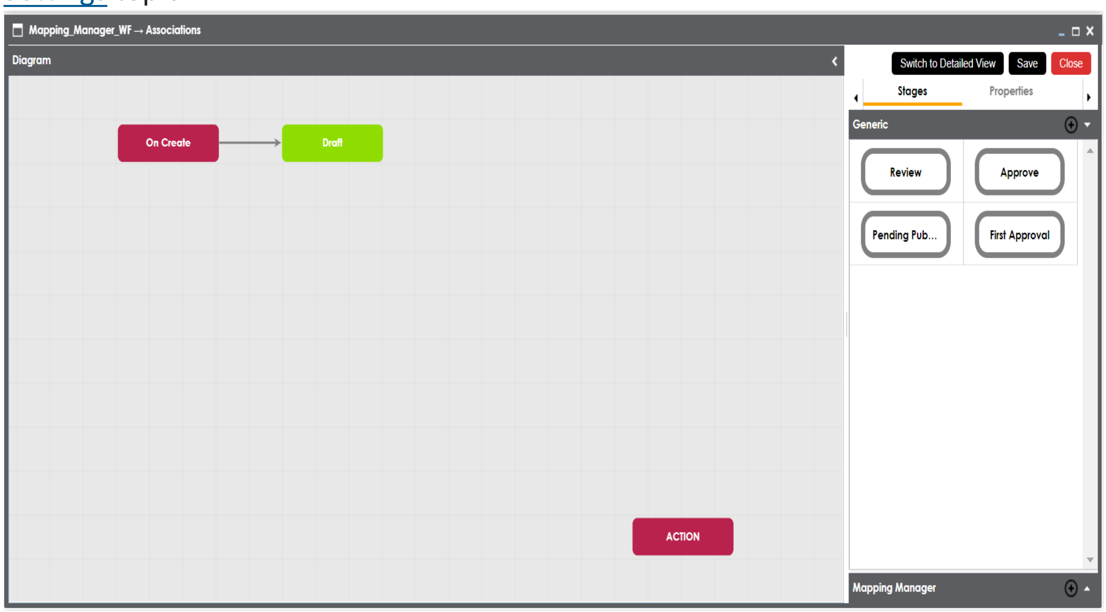
To create stages, follow these steps:

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.



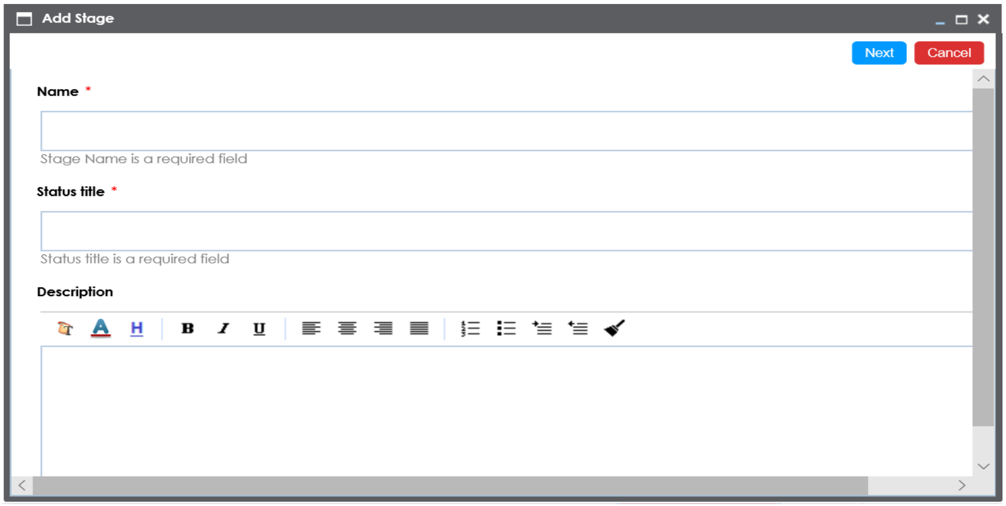
4. Click .

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.



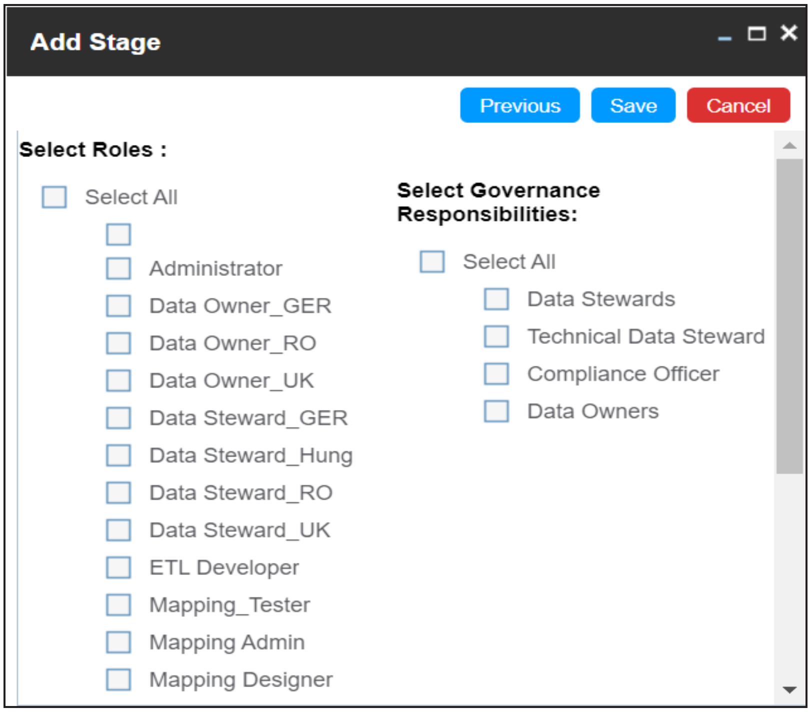
6. Enter **Name**, **Status Title**, and **Description**.

   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.

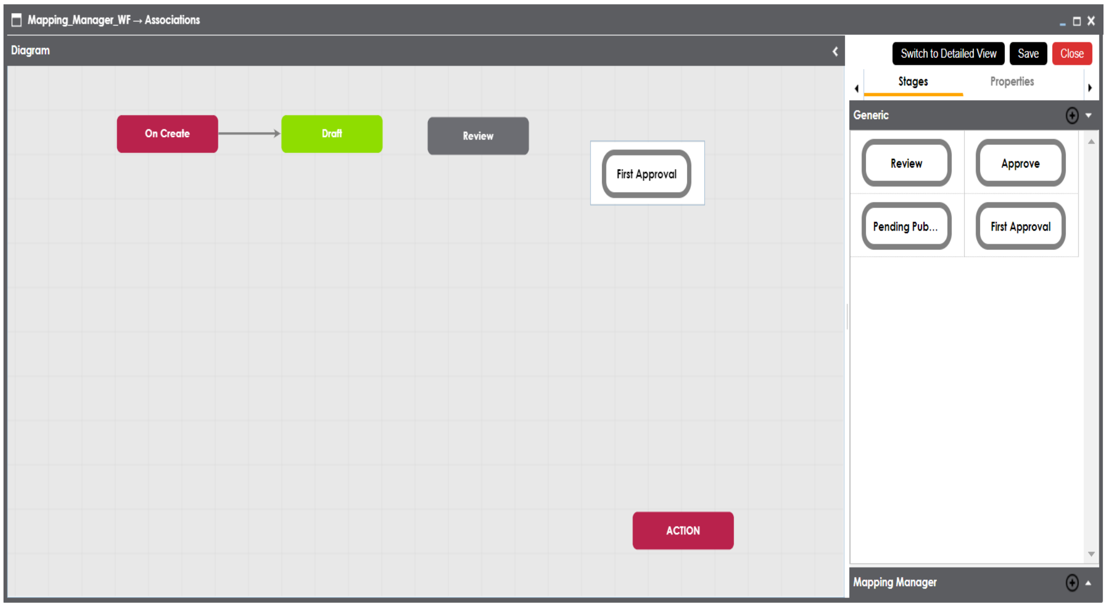
8. Select the required roles and roles groups.
9. Click **Save**.

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

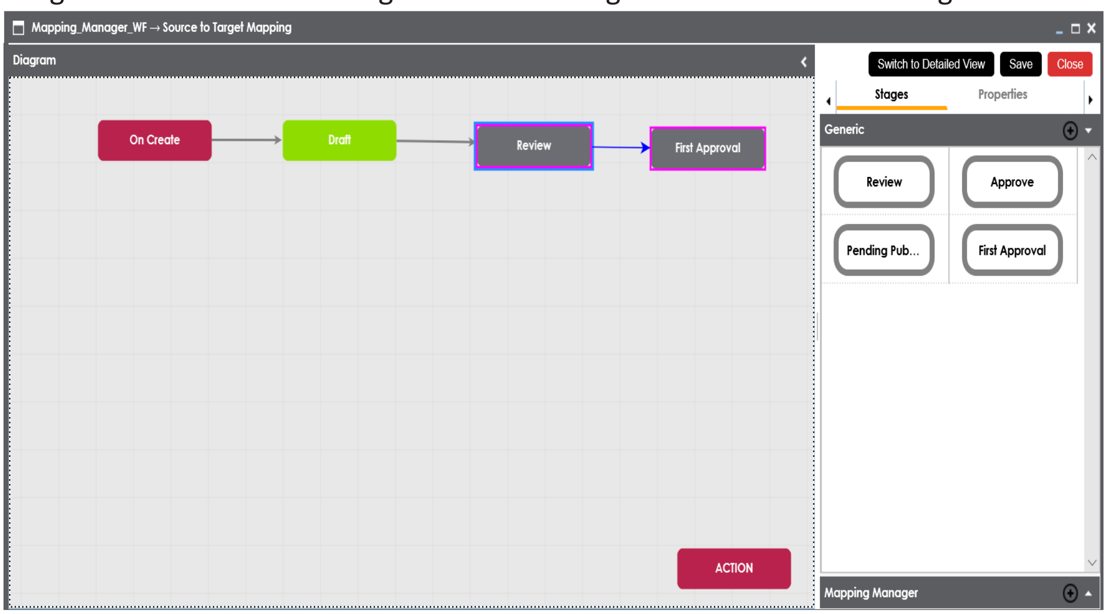
Adding Stages to Workflows

To add generic stages to workflows, follow these steps:

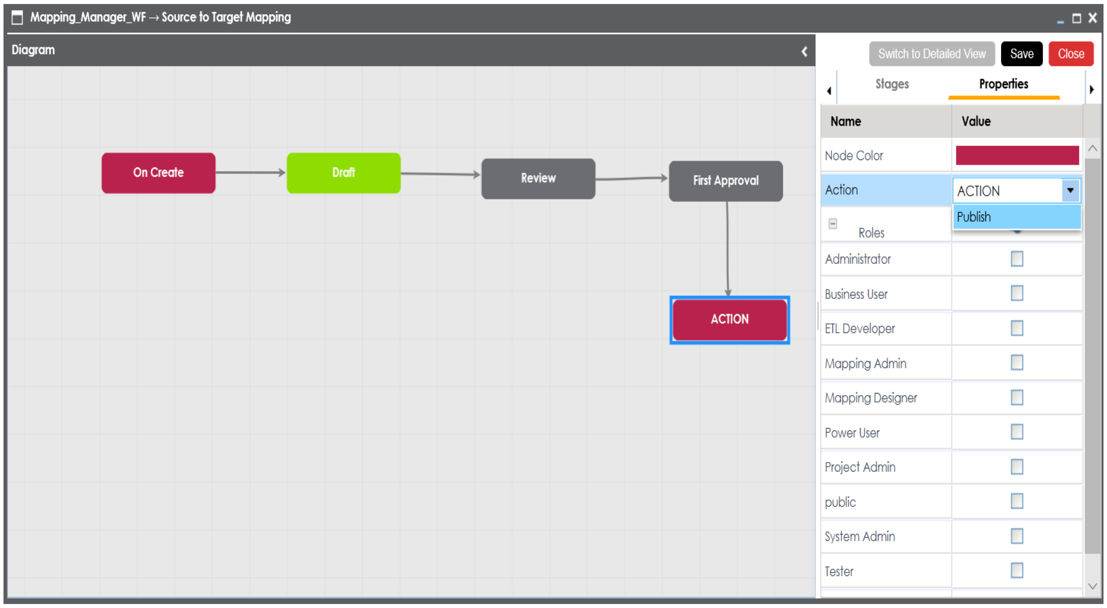
1. Drag and drop the stages from the **Generic** pane to the **Diagram** pane.



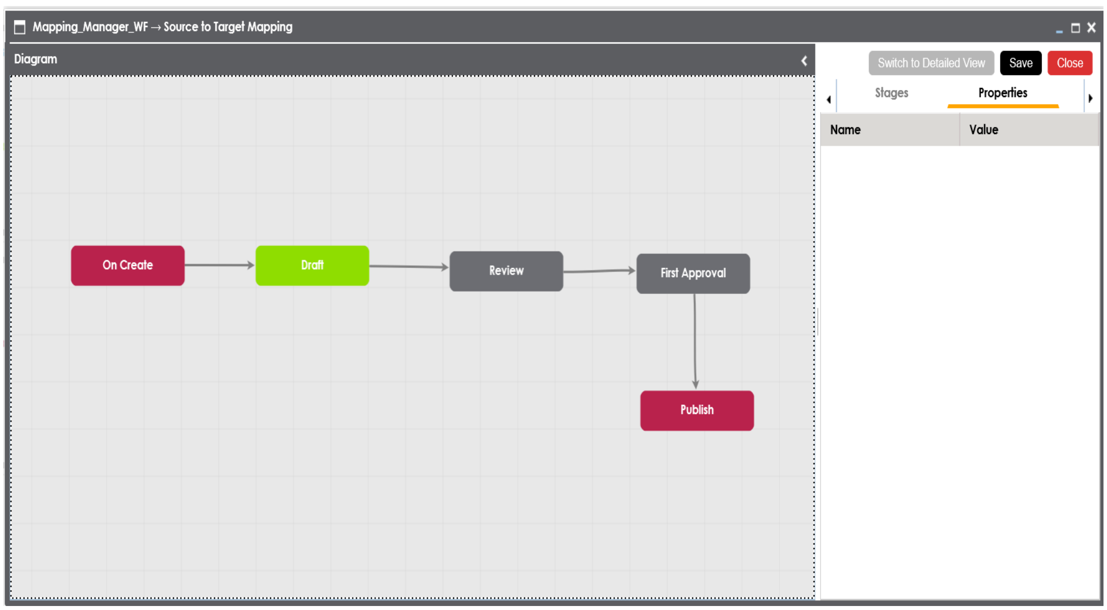
2. Drag the cursor from one stage to the next stage to connect the two stages.



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**.

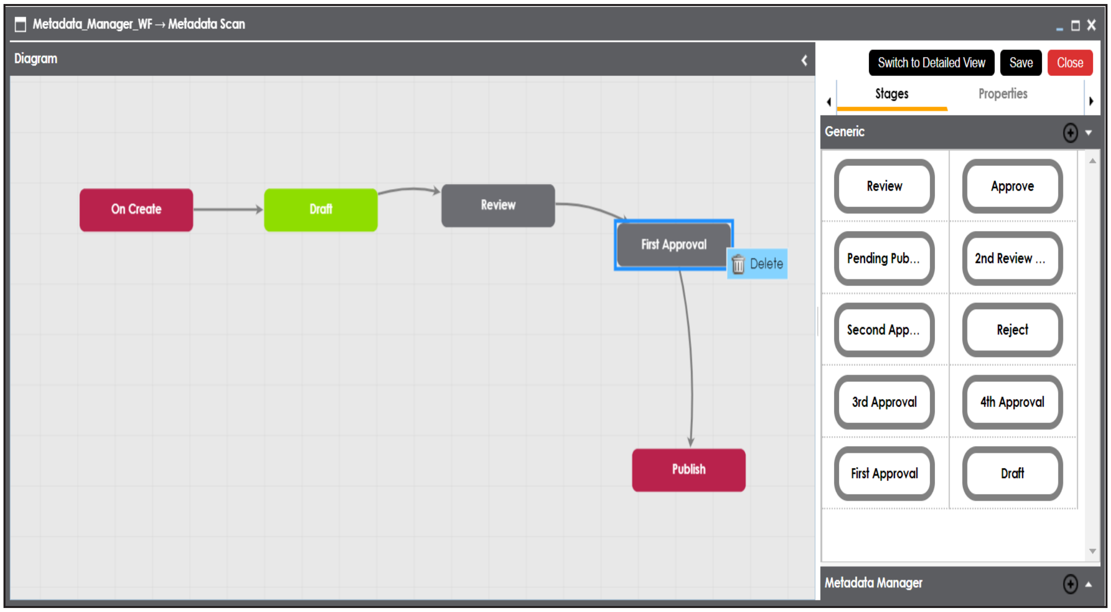


The workflow is configured and saved.

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.

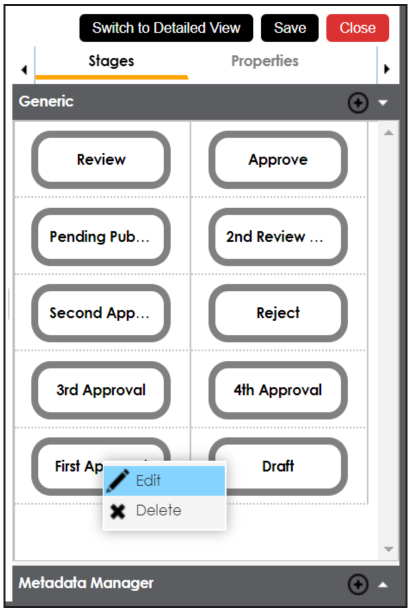
Managing Stages

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:

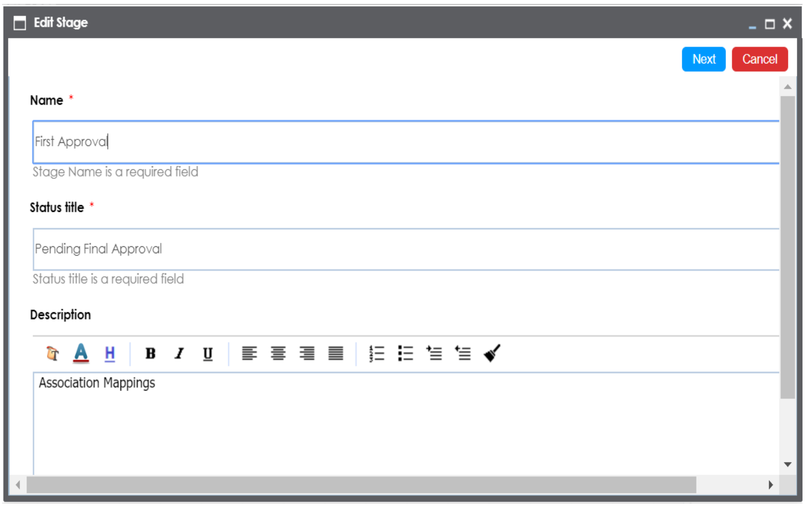
Edit

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

Click **Edit**.

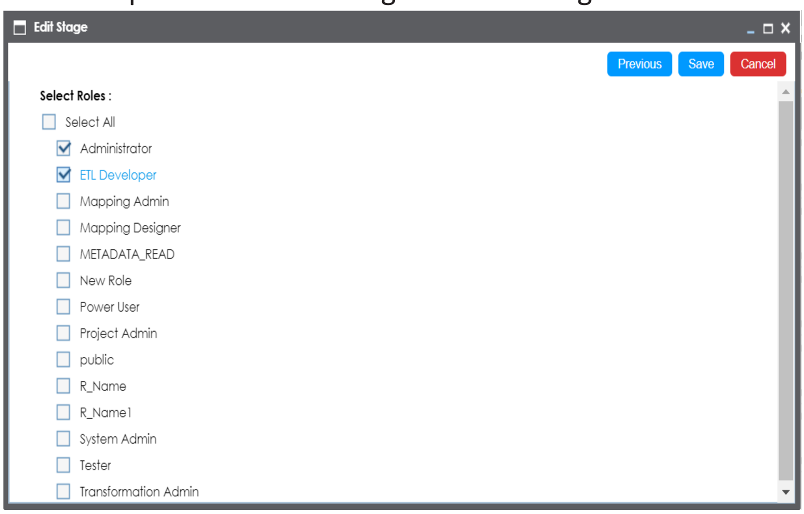
The Edit Stage page appears.

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.

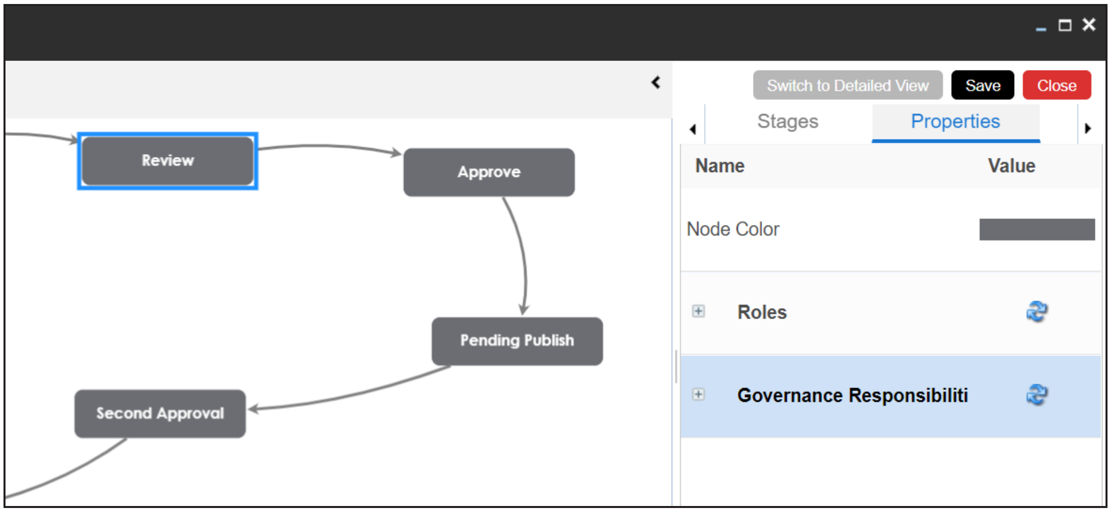
Delete

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

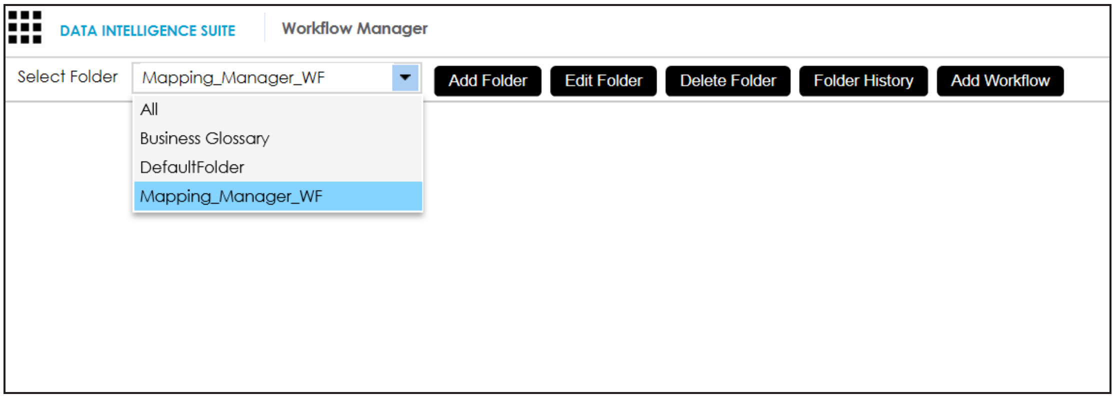
After creating, and configuring a workflow, you can assign the workflow to projects in the Mapping Manager.

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.

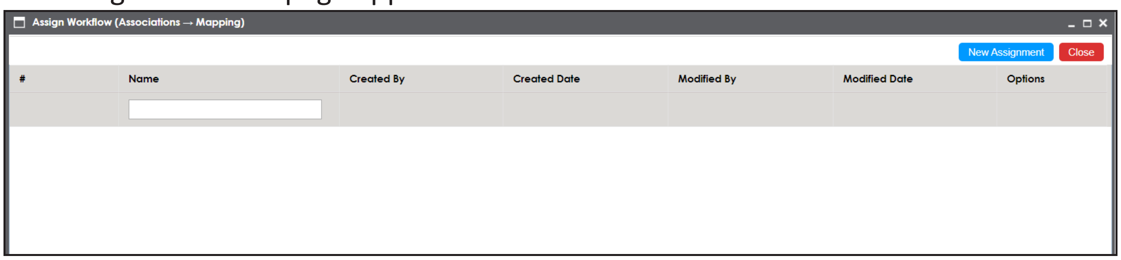
To assign workflows to projects, follow these steps:

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



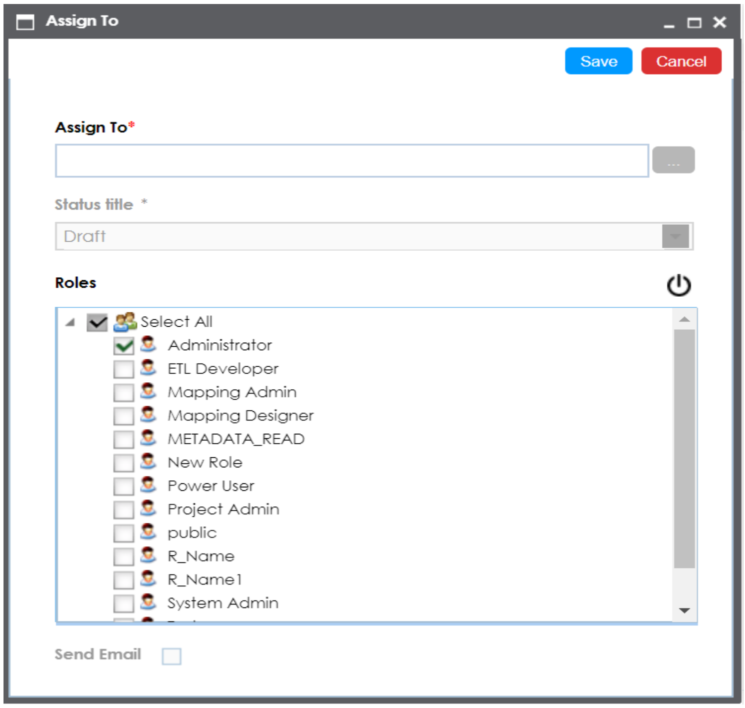
3. Hover over the required workflow, and click ⊕.

   The Assign Workflow page appears.



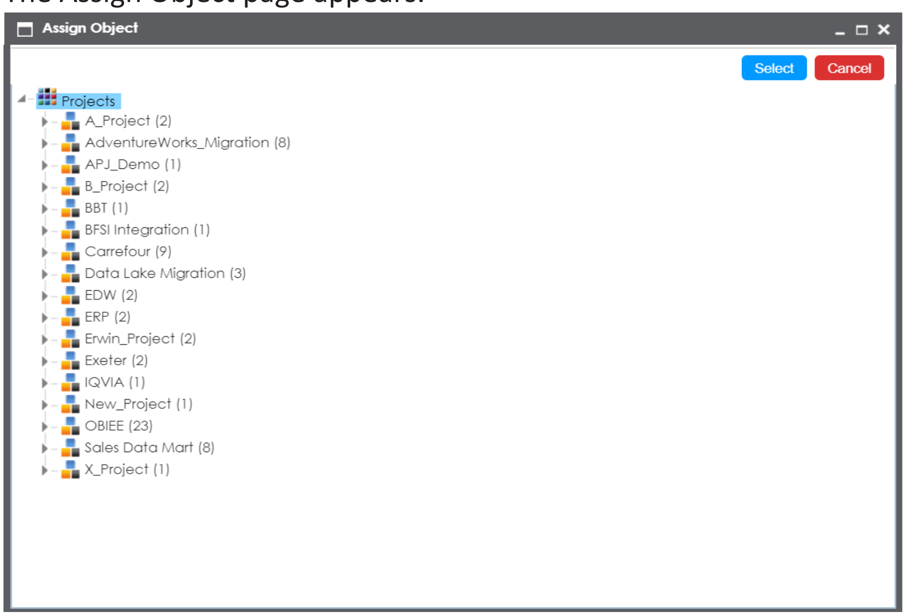
4. Click **New Assignment**.

   The Assign To page appears.



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

The Assign Object page appears.



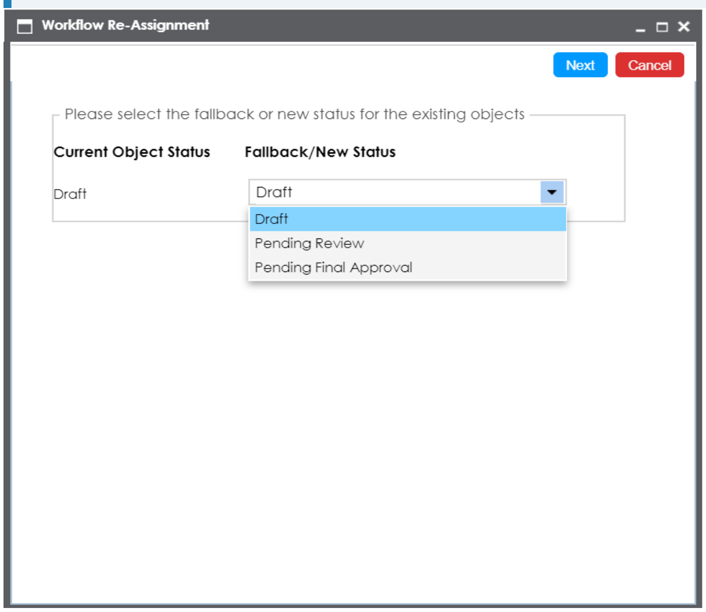
6. Select a project and click **Select**.

   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.



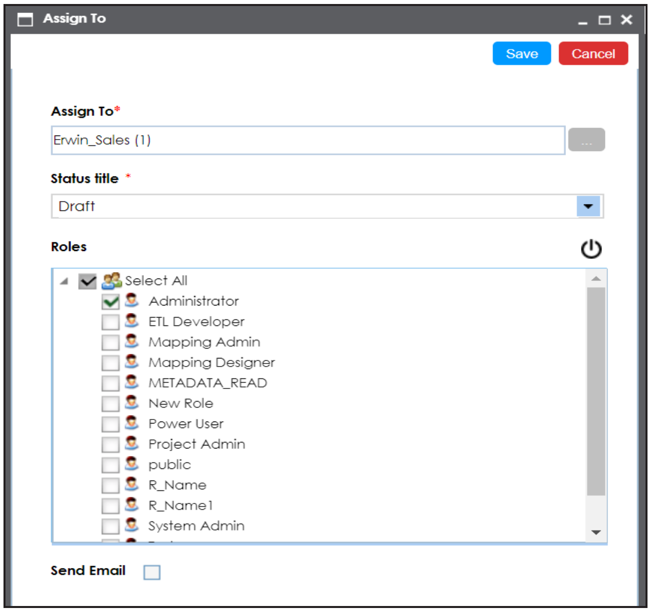
8. Select an appropriate **Fallback/New Status**.

   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.

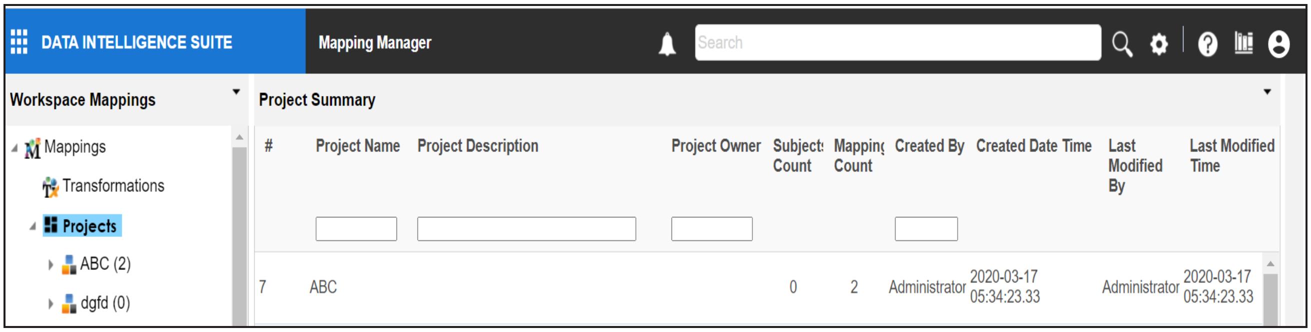
Executing workflows involves:

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

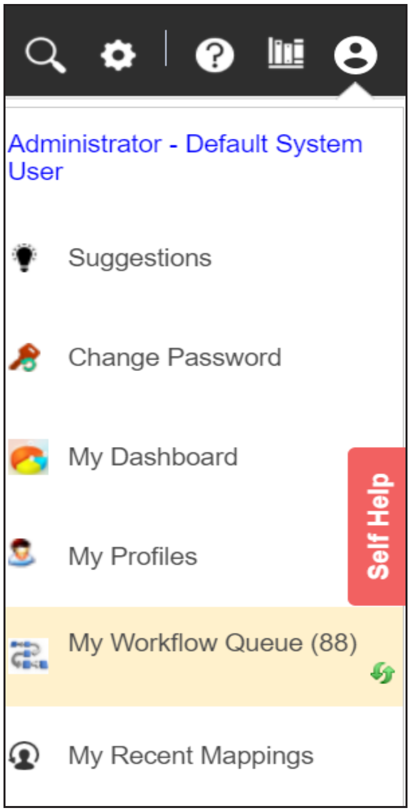
To execute workflows for the mappings in the Mapping Manager, follow these steps:

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

   The Mapping Manager page appears.

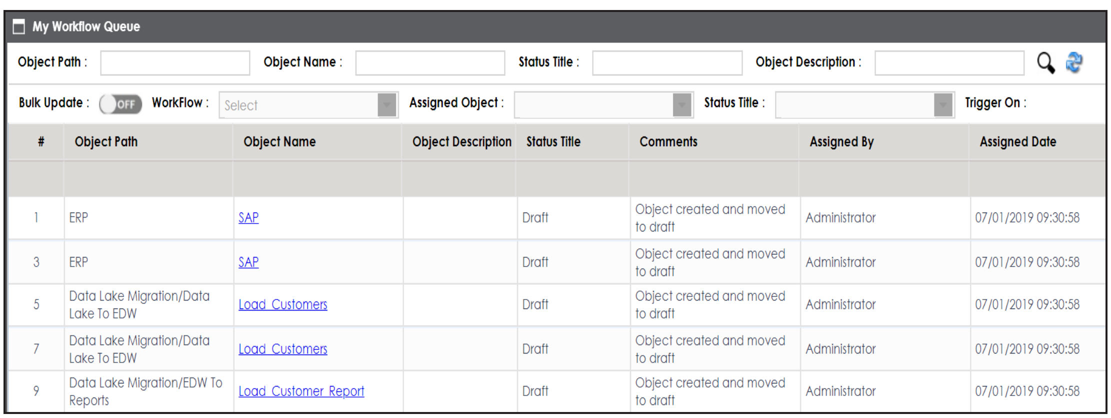


2. Click .



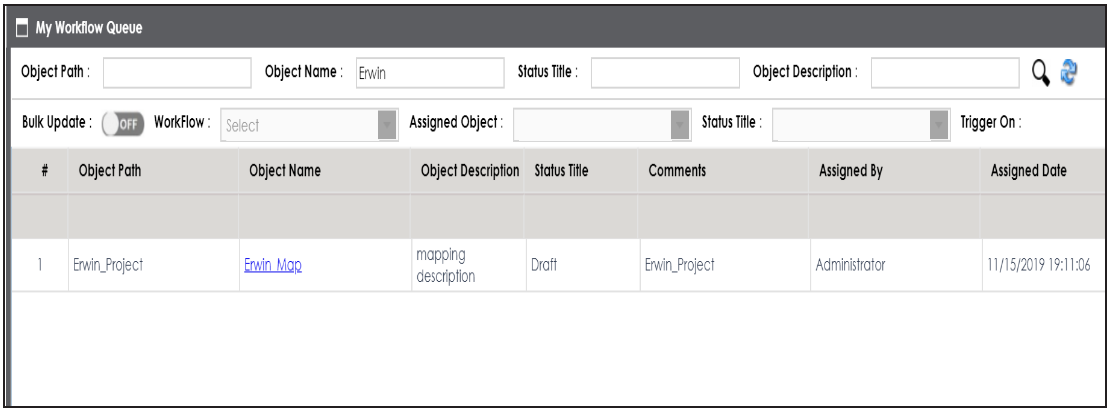
3. Click **My Workflow Queue**.

   The My Workflow Queue page appears showing workflow queues.



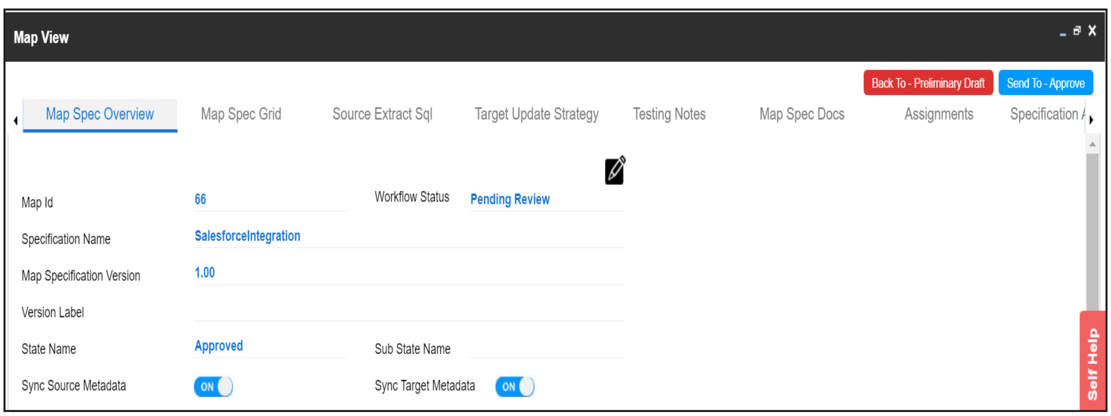
4. Search the required object. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search results appear.



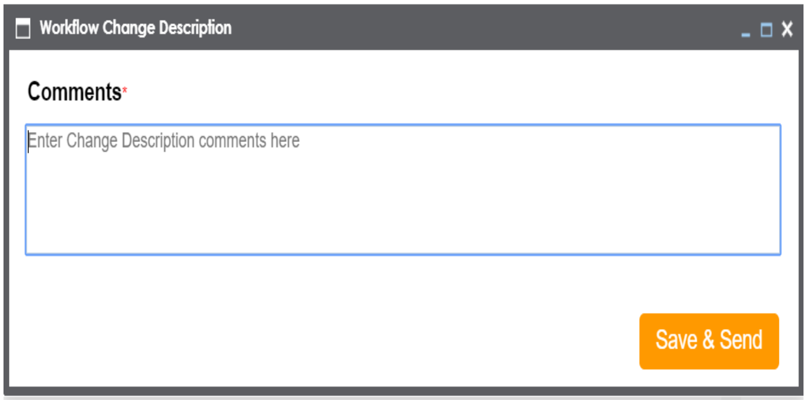
5. Click the <Object_Name> appearing as a hyperlink.

   The Map View page appears.



6. 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

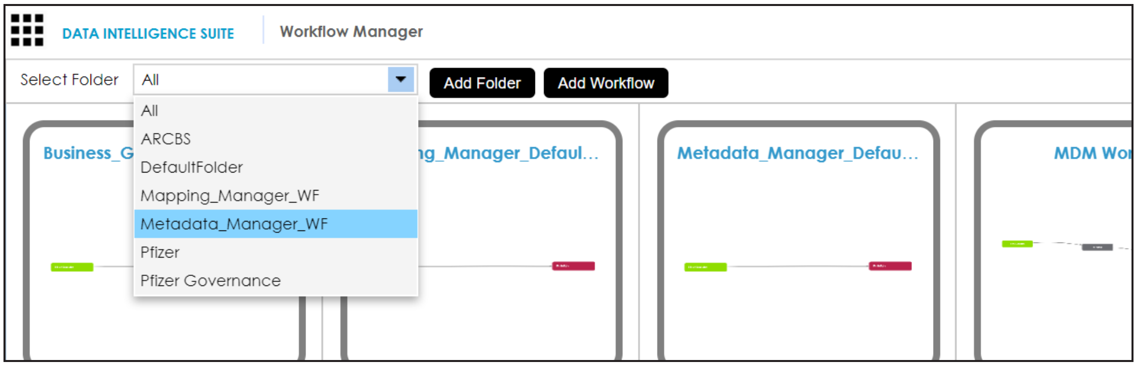
After creating, and configuring a workflow, you can assign the workflow to environments in the Metadata Manager.

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.

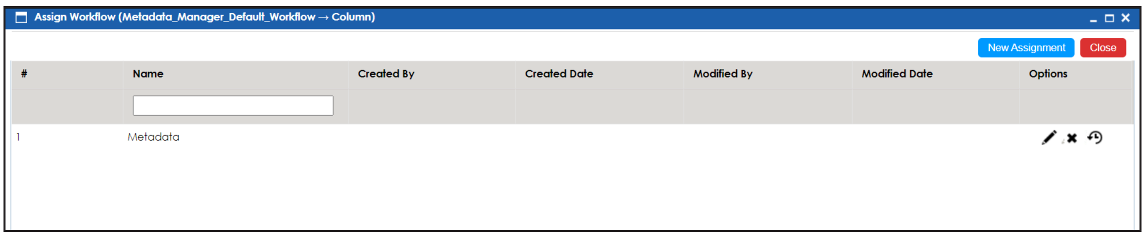
To assign workflows to environments, follow these steps:

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



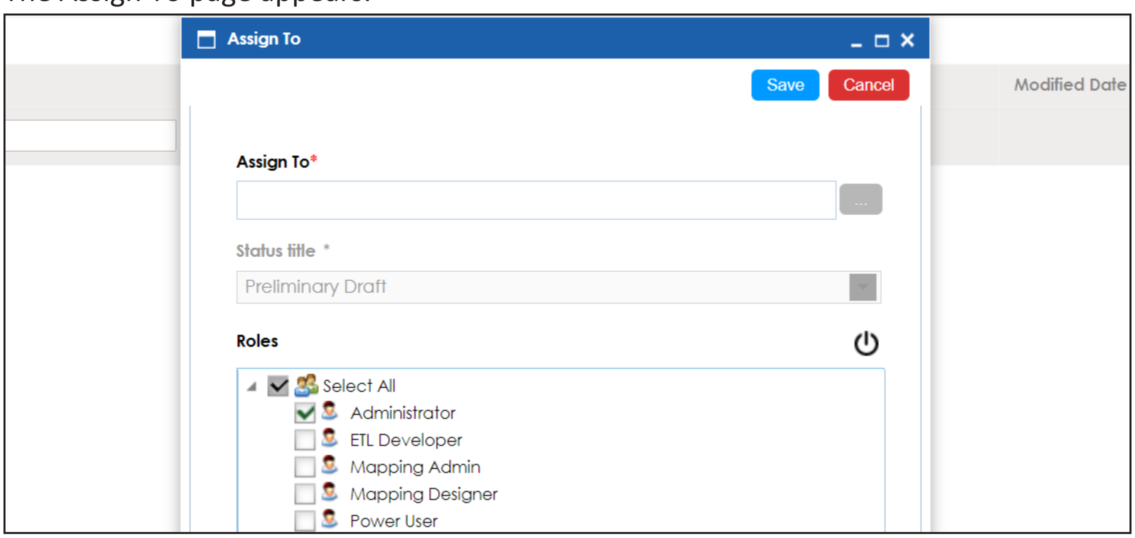
2. Hover over a workflow and click .

   The Assign Workflow page appears.



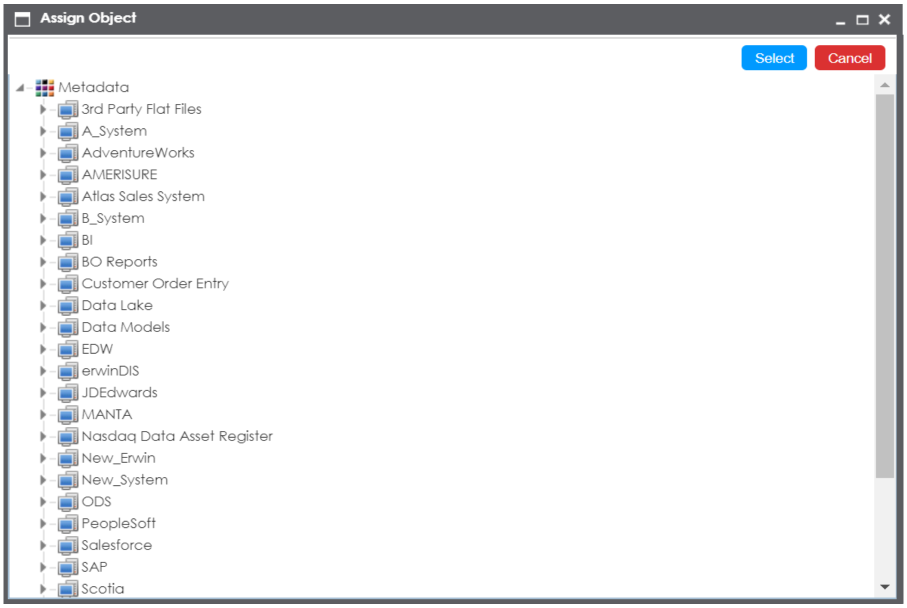
3. Click **New Assignment**.

   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.

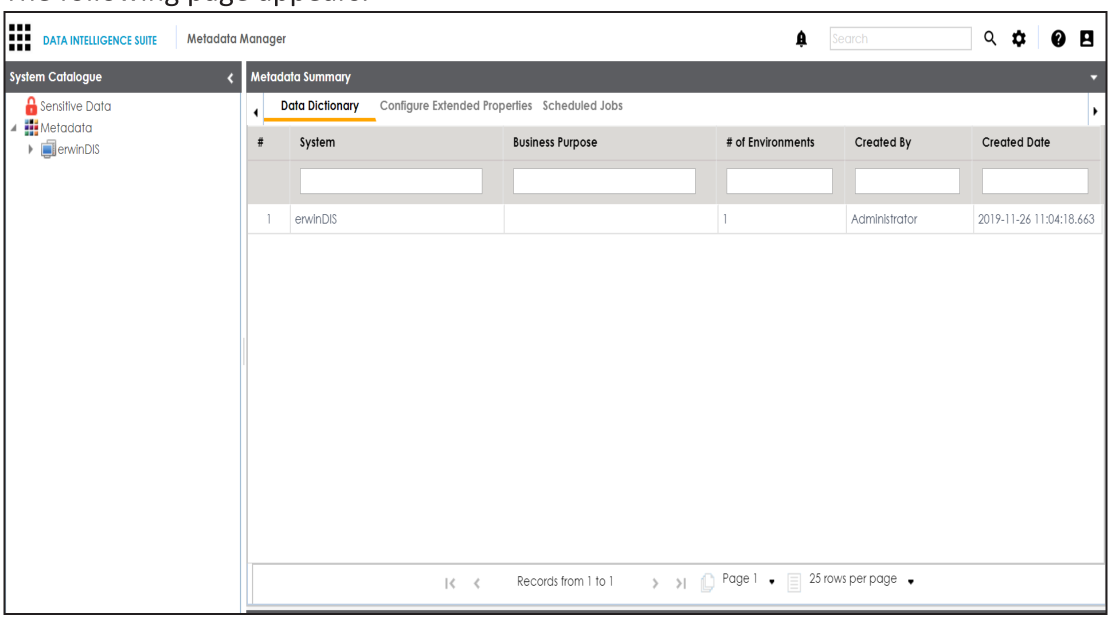
Executing workflows involves:

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:

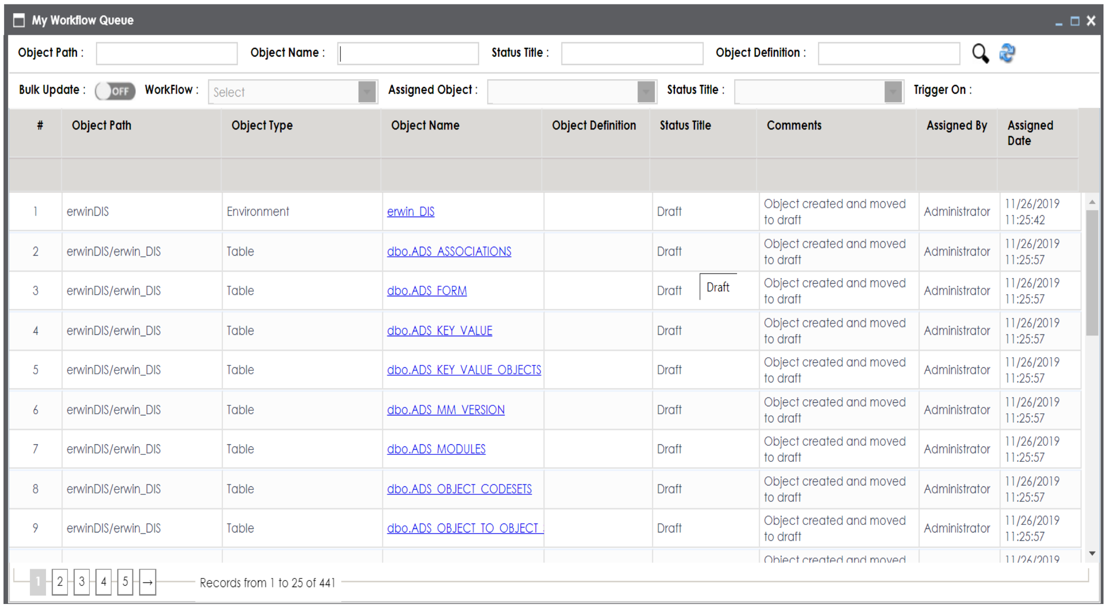
1. Go to **Application Menu** > **Data Catalog** > **Metadata Manager**.

   The following page appears.

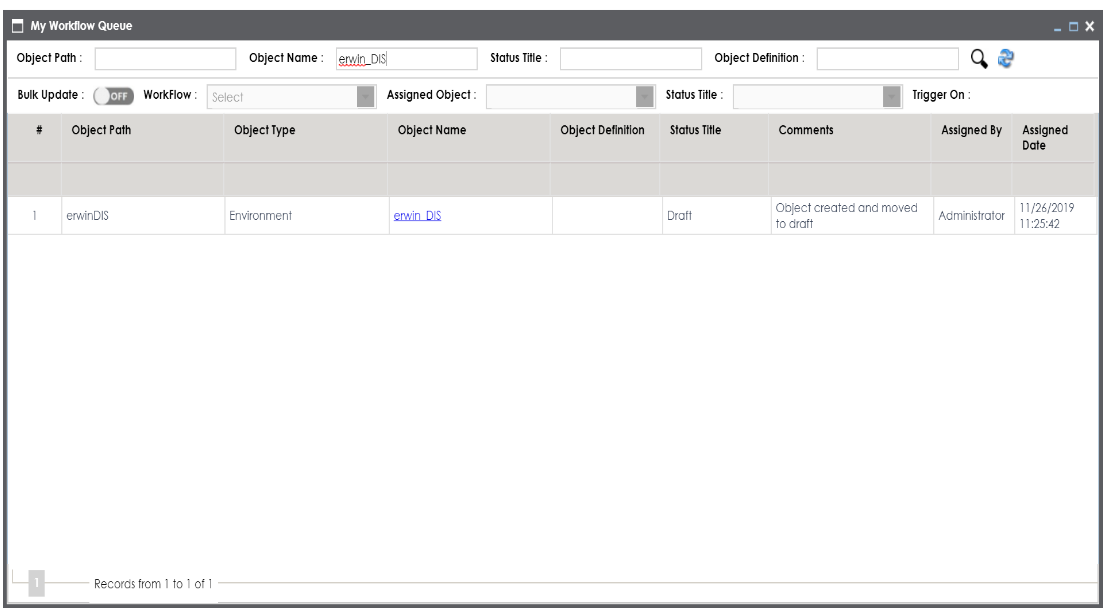
2. Click .
3. Click **My Workflow Queue**.

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



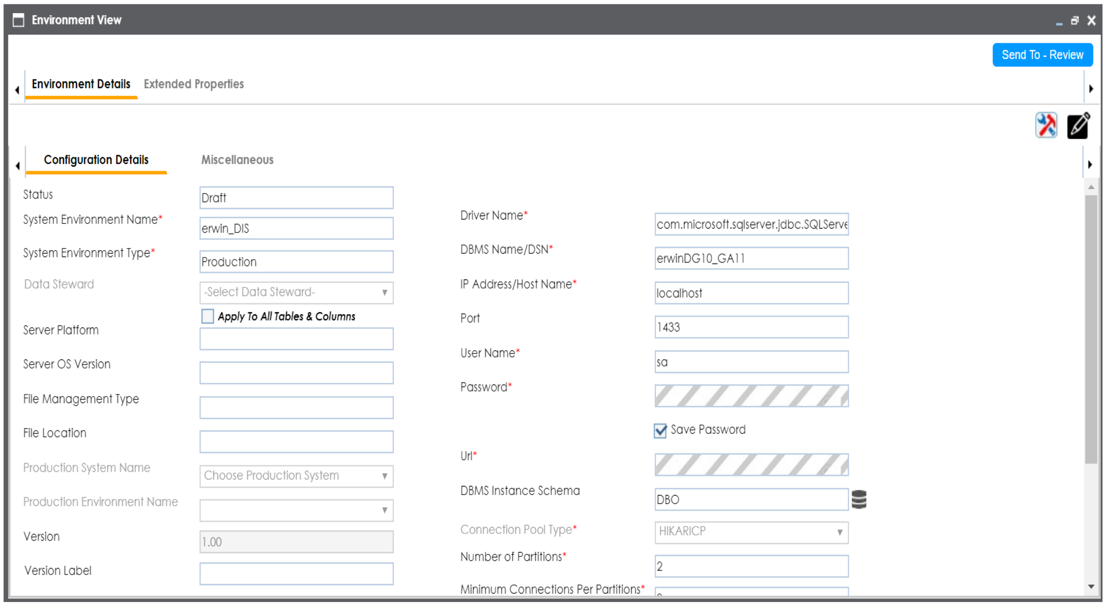
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search results are displayed.



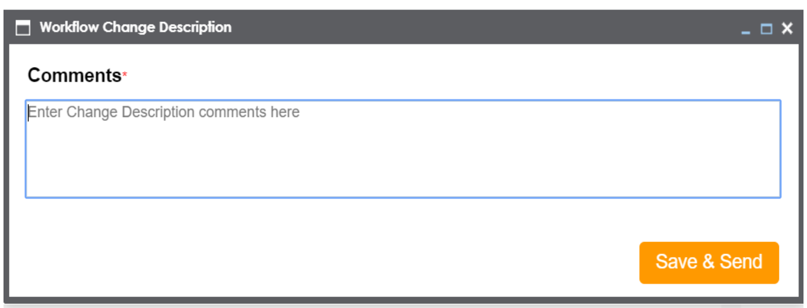
5. Click the required <Object Name> which appears as hyperlink.

   The Environment View page appears.



6. 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.

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.

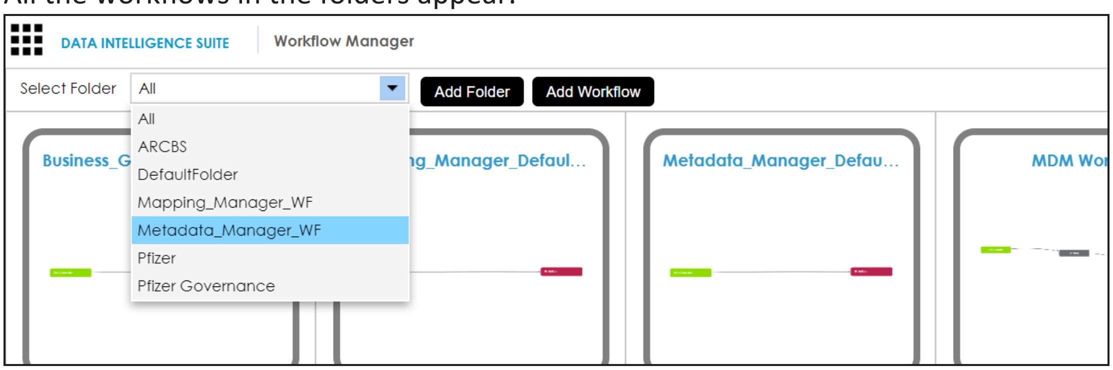
Assigning Workflows to Tables

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

Before you assign workflows to tables:

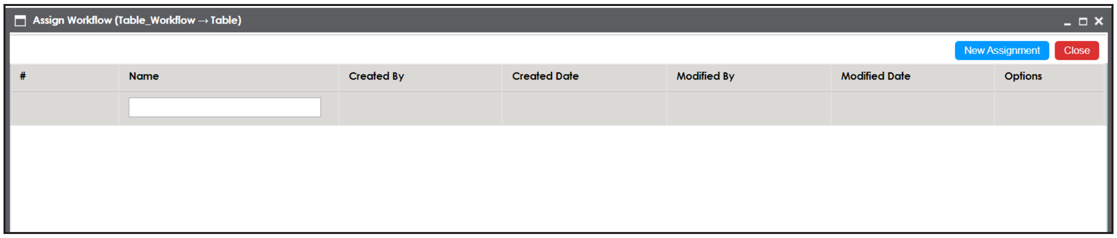
- Ensure that you select **Metadata Manager** as module and **Table** as object while adding the workflow to the folder.
- The default workflow, Metadata_Manager_Default_Workflow_1 is assigned to all the tables. Hence, you need to override the existing default workflow.

To assign workflows to tables, follow these steps:

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

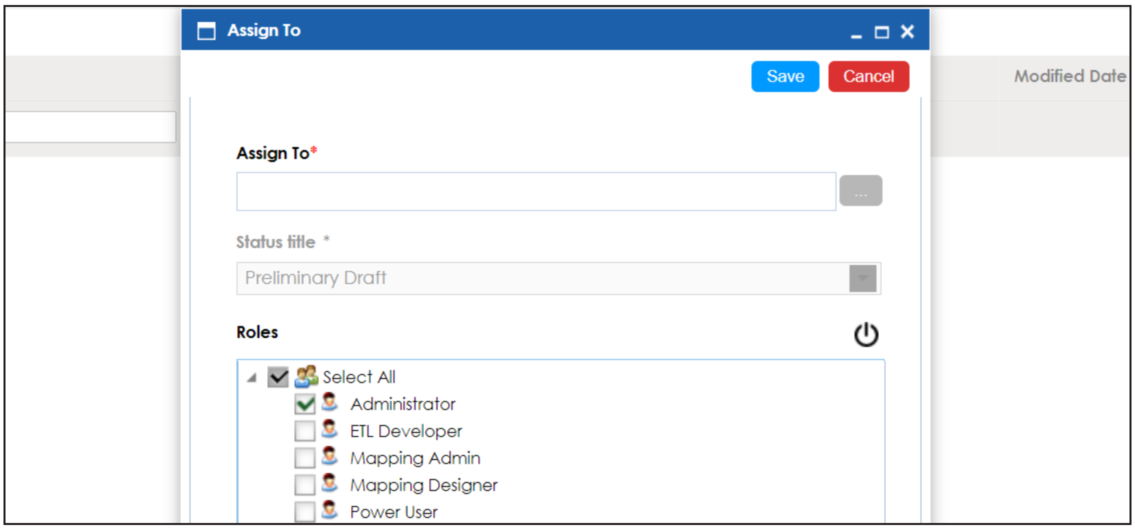
2. Hover over a workflow, and click ⊕.

The Assign Workflow page appears.



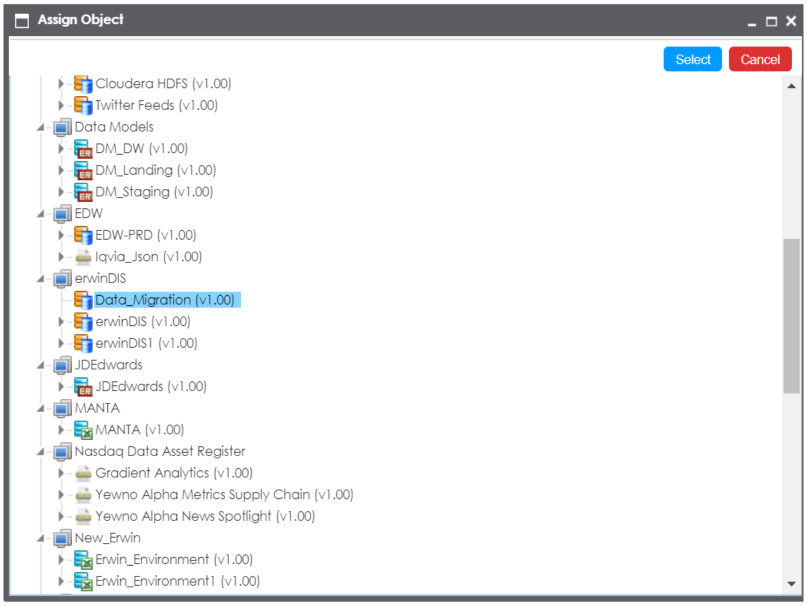
3. Click **New Assignment**.

   The Assign To page appears.



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

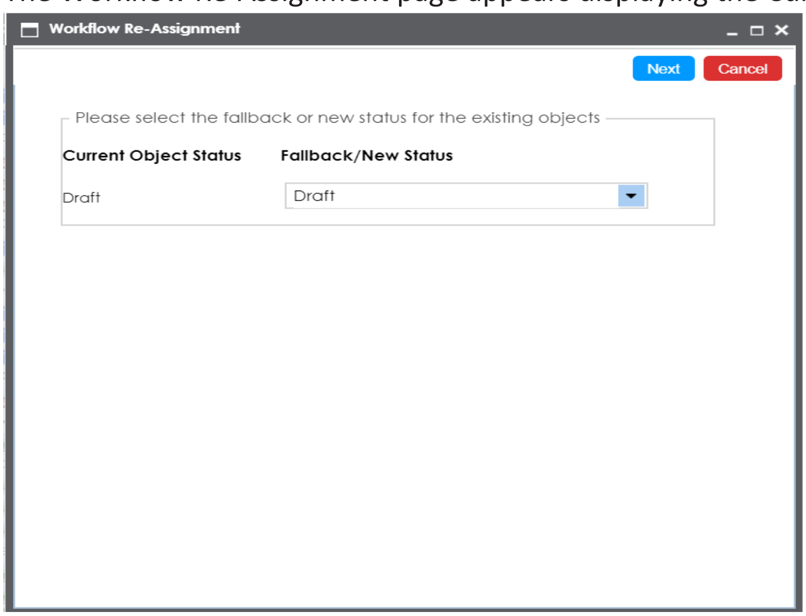
   The Assign Object page appears.



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.

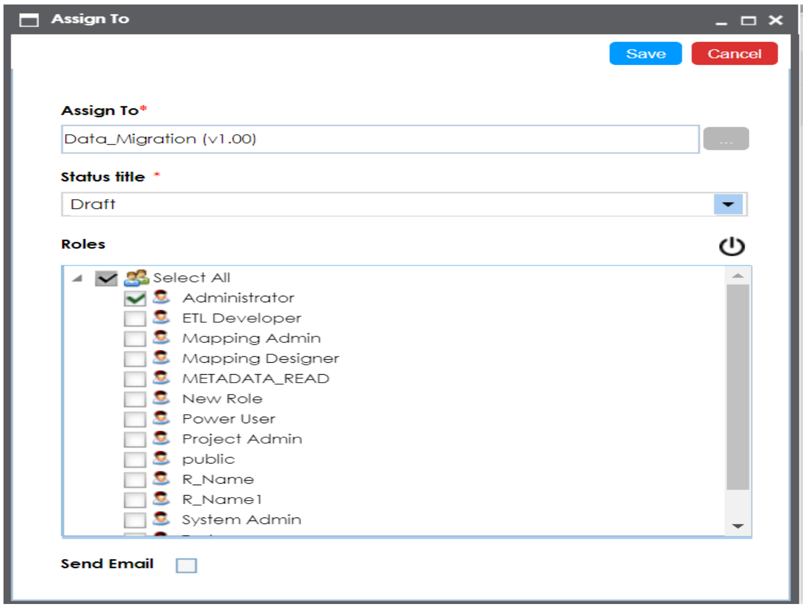
   The options for Fallback/New Status depends on the [stages defined in the workflow].

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 Work-flow 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.

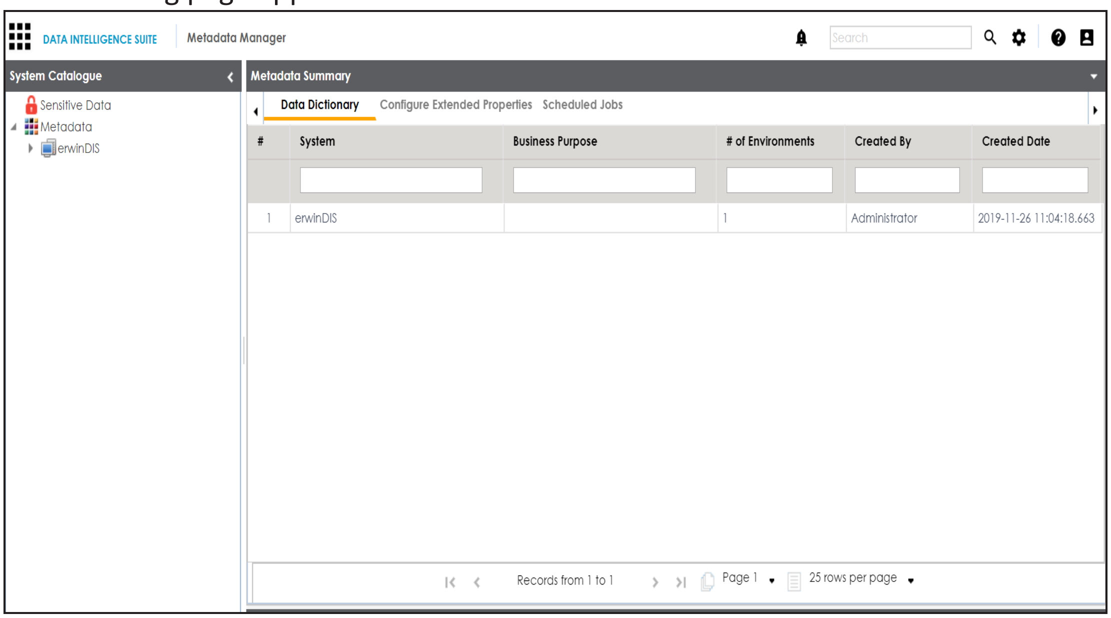
Executing workflows involves:

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:

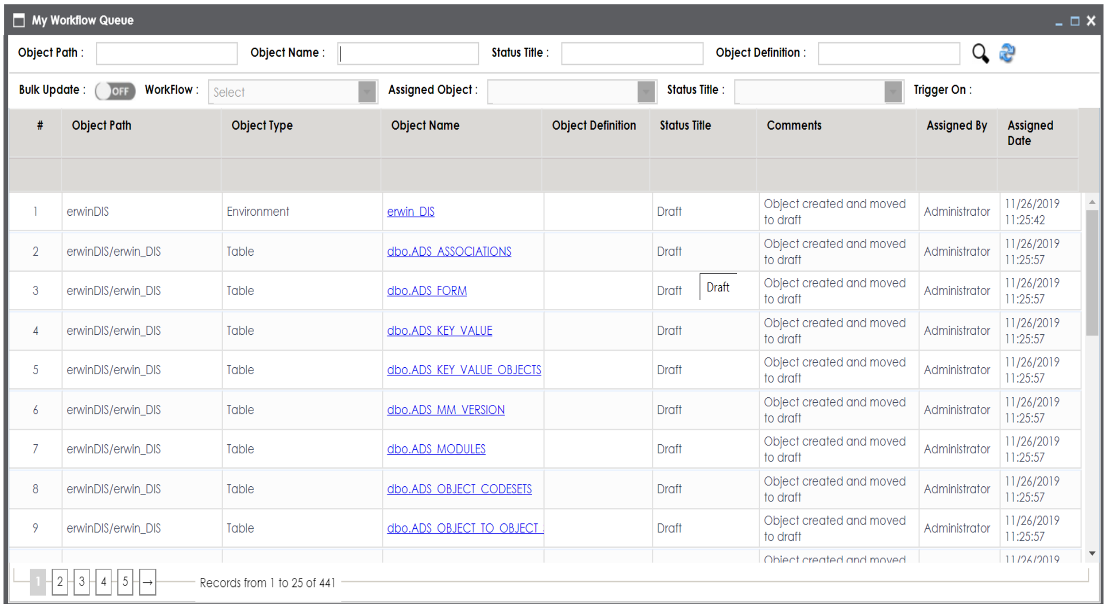
1. Go to **Application Menu** > **Data Catalog** > **Metadata Manager**.

   The following page appears.



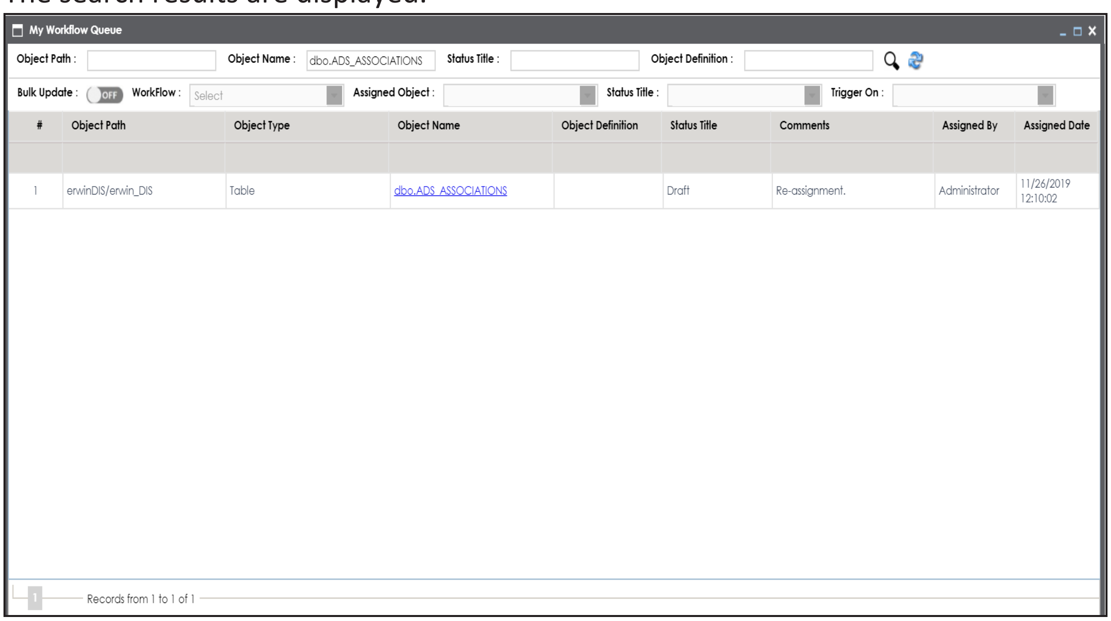
2. Click .
3. Click **My Workflow Queue**.

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



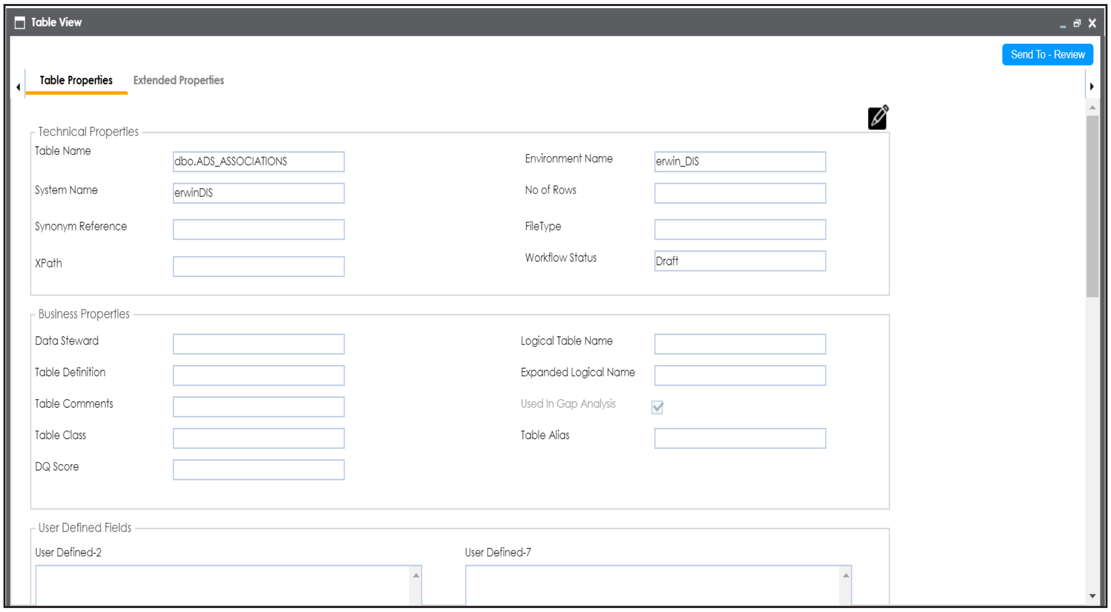
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search results are displayed.



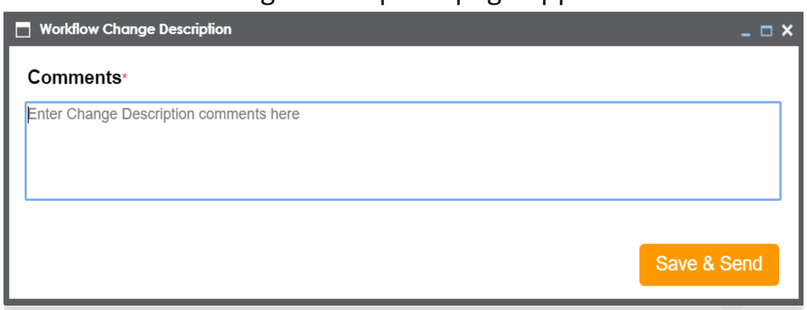
5. Click the required <Object Name> which appears as hyperlink.

The Table View page appears.



6. 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.

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

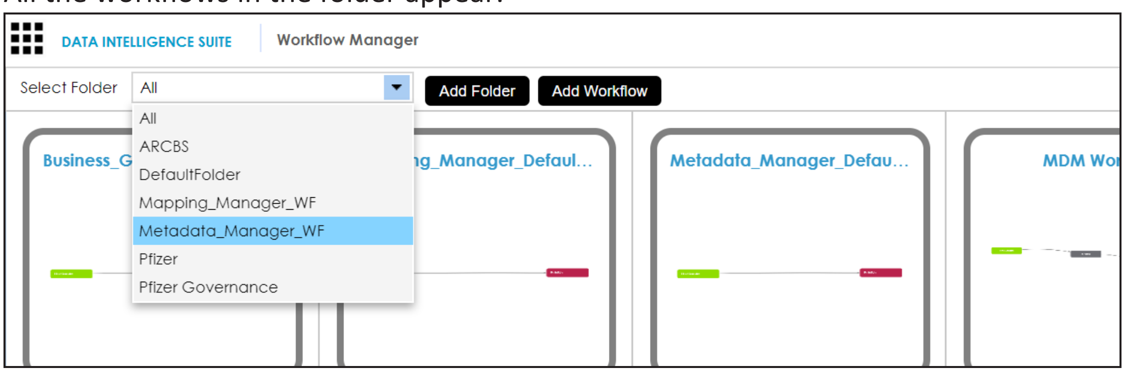
After creating, and configuring a workflow, you can assign the workflow to columns in Metadata Manager.

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.

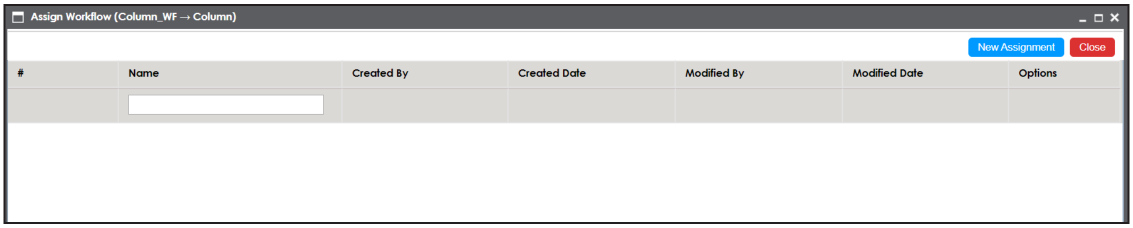
To assign workflows to columns, follow these steps:

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



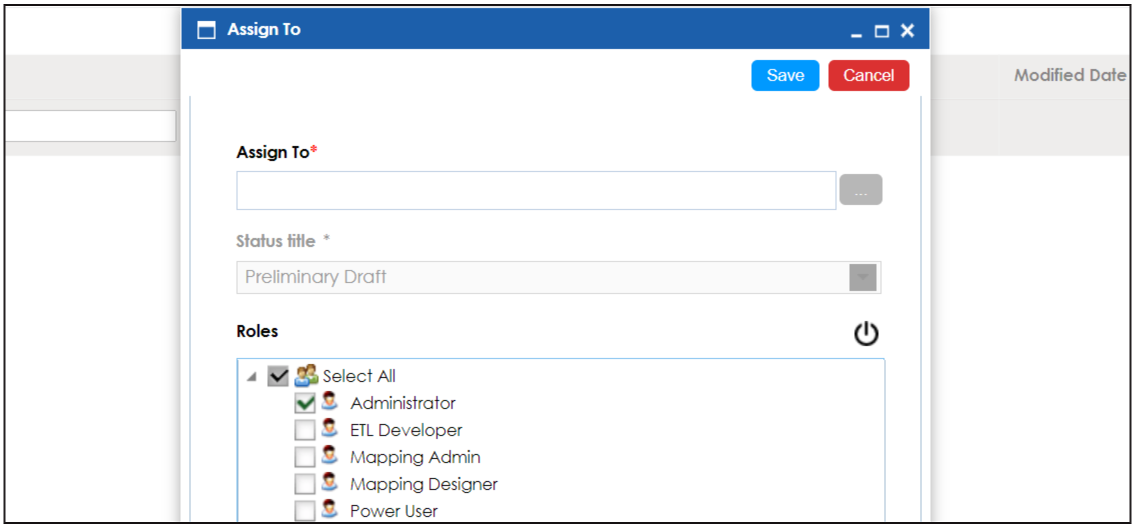
2. Hover over the required workflow and click ⊕.

   The Assign Workflow page appears.



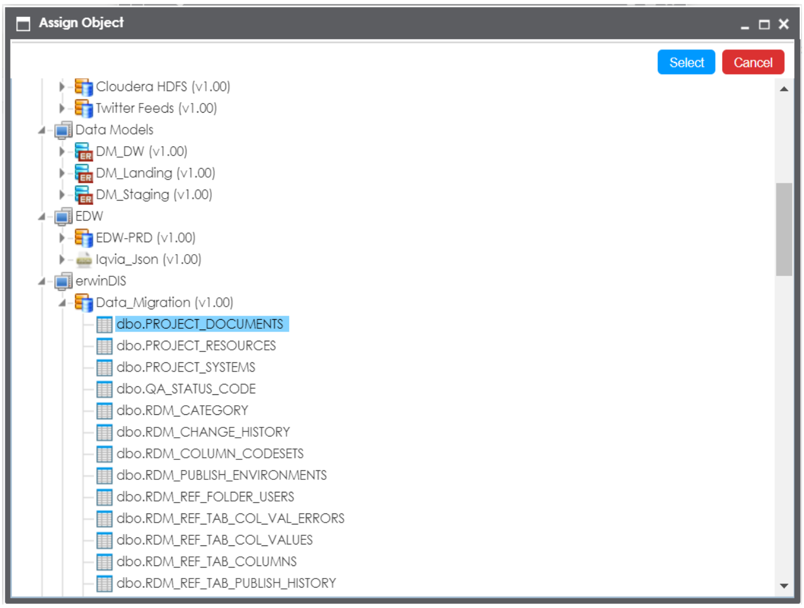
3. Click **New Assignment**.

   The Assign To page appears.



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

   The Assign Object page appears.

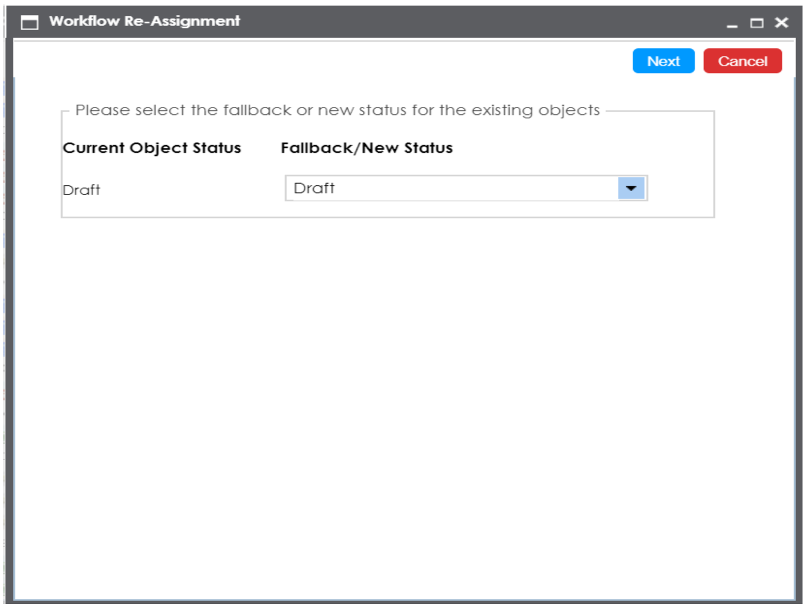


5. Select a table with necessary columns and click **Select**.

   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.

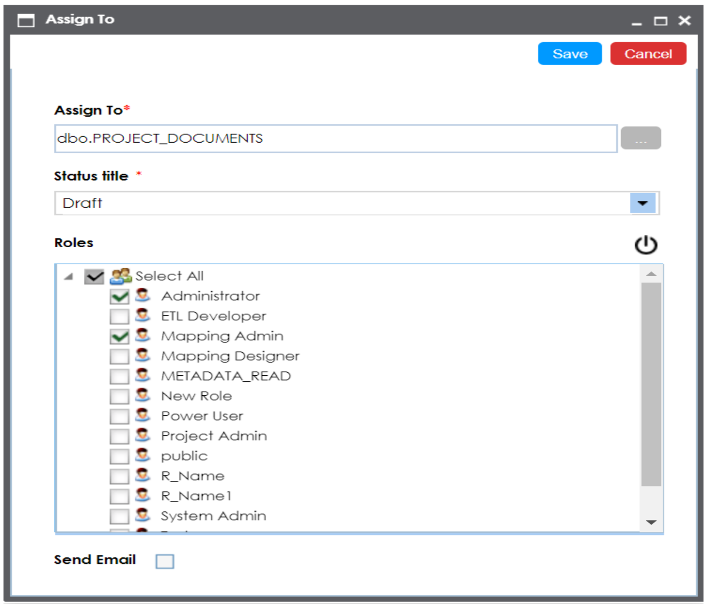
   The options for Fallback/New Status depends on the [stages defined in the workflow](#).

8. Click **Next**.

   The Comments page appears.

9. Enter relevant comments, and click .

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



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.

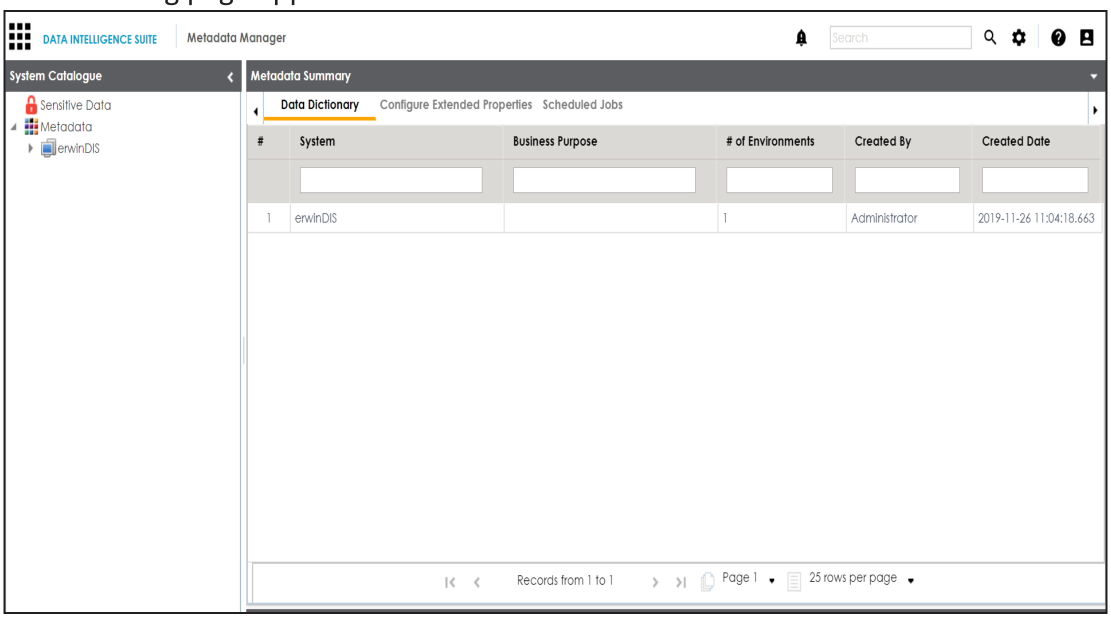
Executing workflows involves:

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:

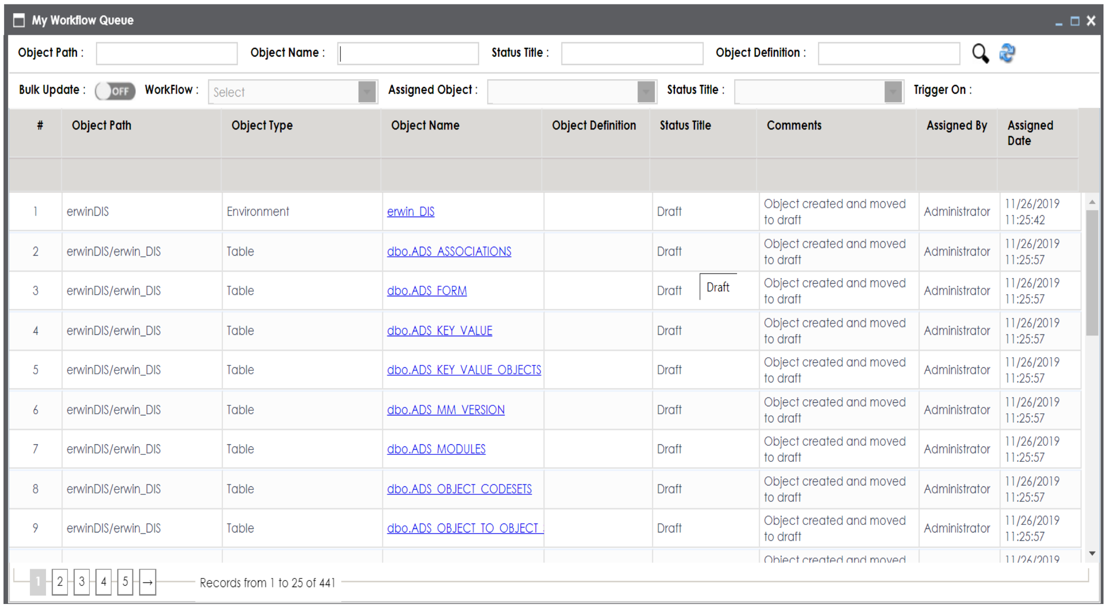
1. Go to **Application Menu** > **Data Catalog** > **Metadata Manager**.

   The following page appears.



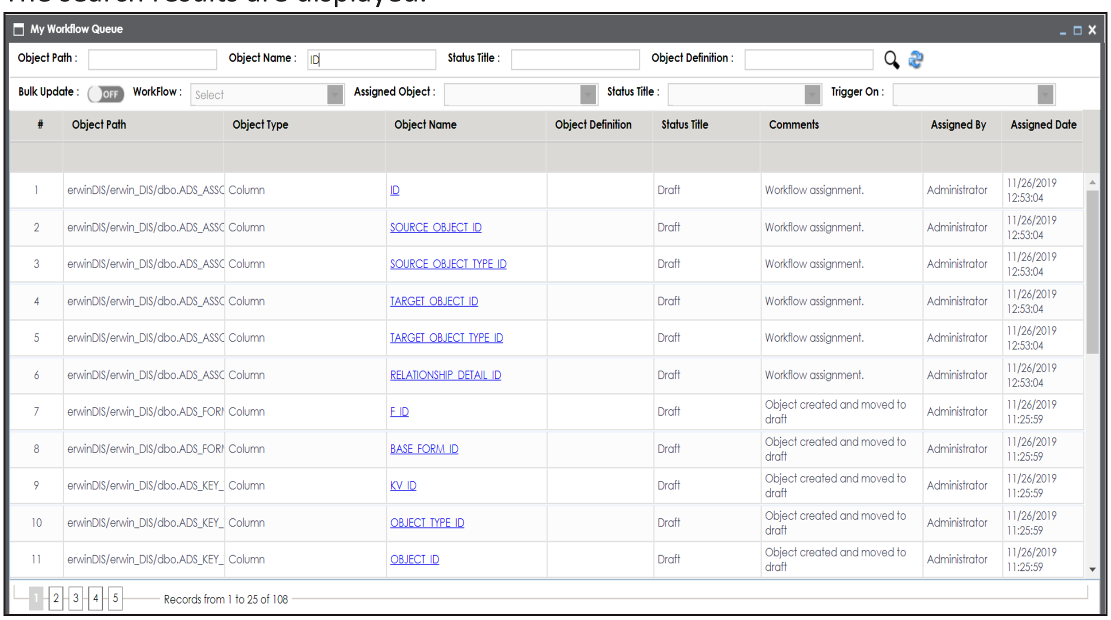
2. Click .
3. Click **My Workflow Queue**.

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



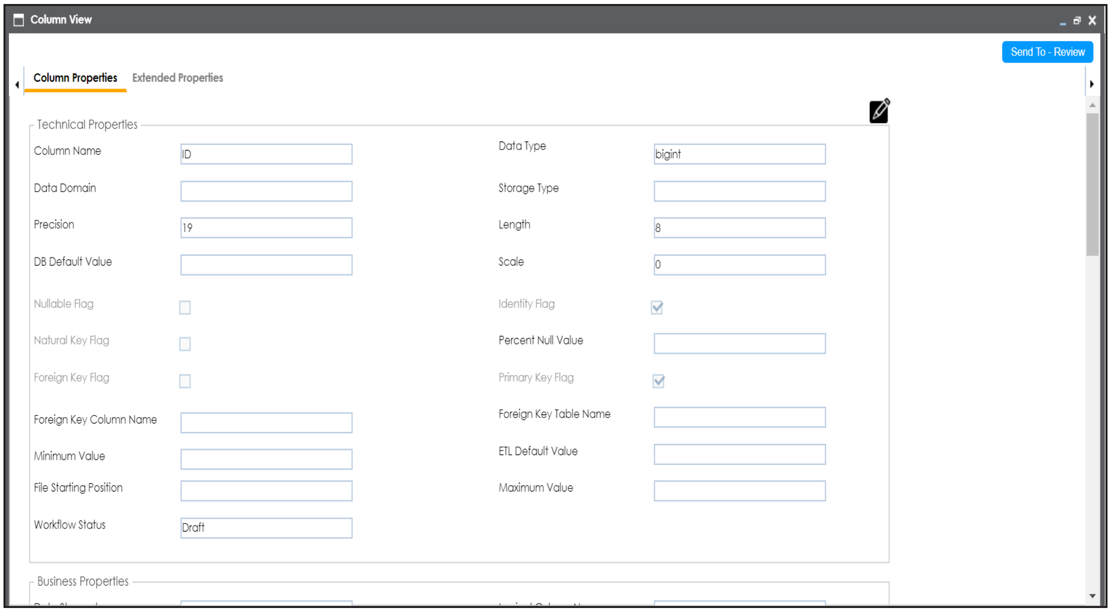
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking 🔍.

   The search results are displayed.



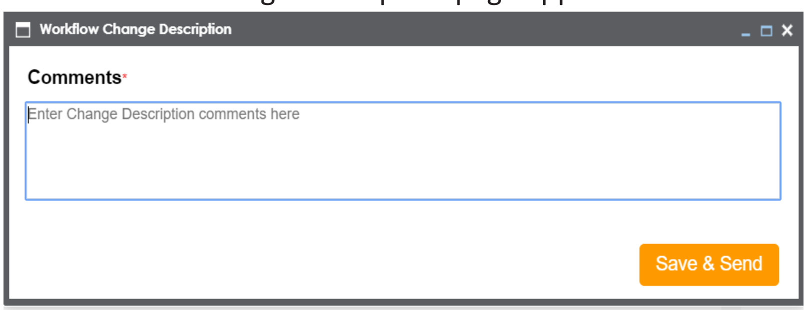
5. Click the required <Object Name> which appears as hyperlink.

The Column View page appears.



6. 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.

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

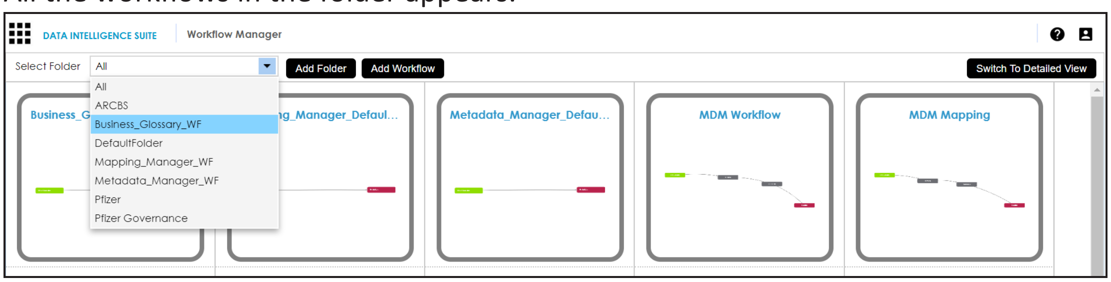
After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to business term in the Business Glossary Manager.

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.

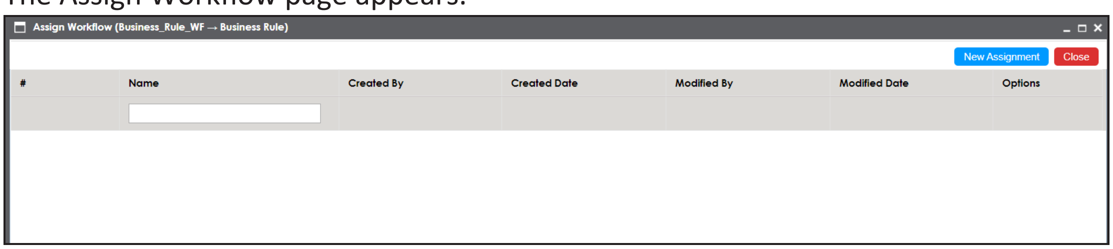
To assign workflows to business terms, follow these steps:

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



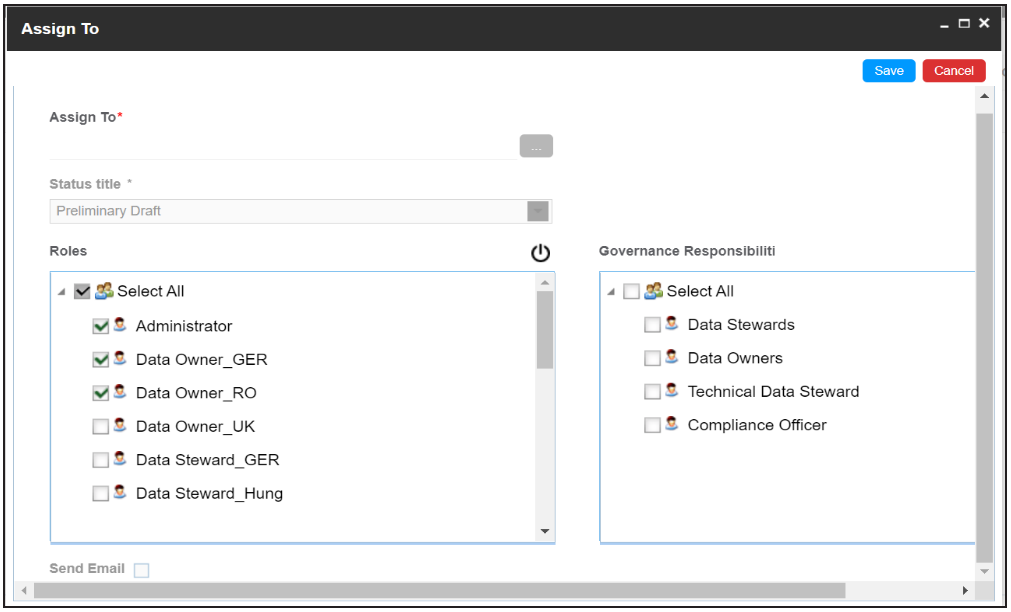
3. Hover over a workflow and click ⊕.

   The Assign Workflow page appears.



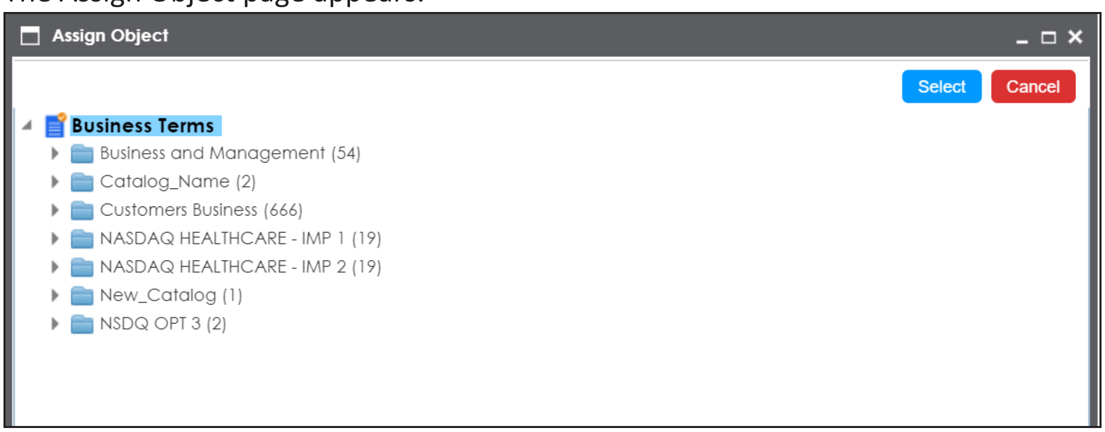
4. Click **New Assignment**.

   The Assign To page appears.



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

   The Assign Object page appears.

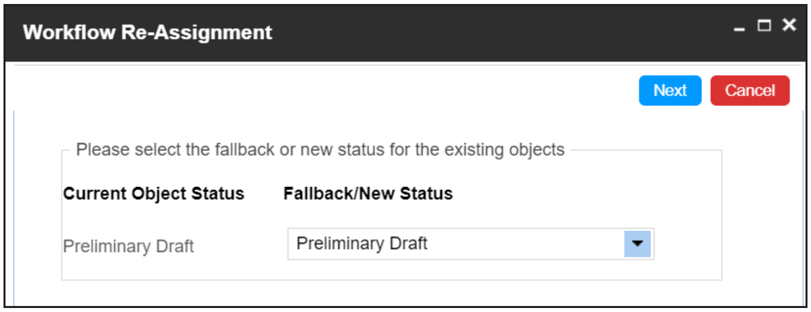


6. Select a catalog and click **Select**.

   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 Fall-back/New Status of the business terms.



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

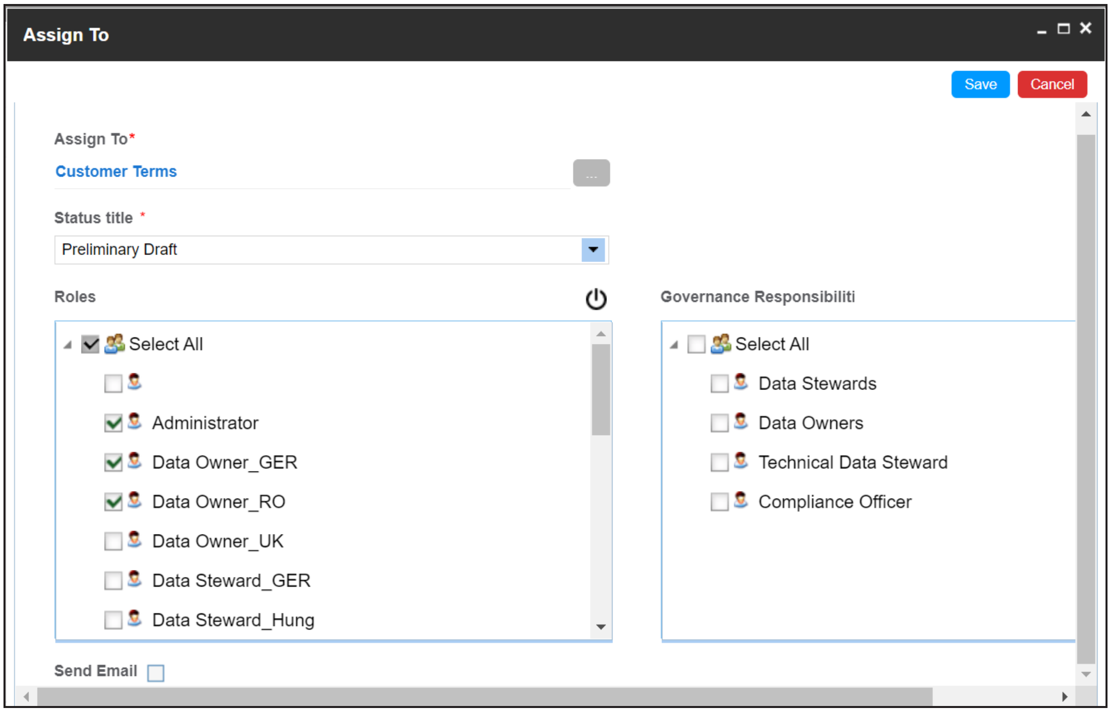
   For example, if you select Preliminary Draft then the new status of business terms is set to Preliminary Draft.

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.

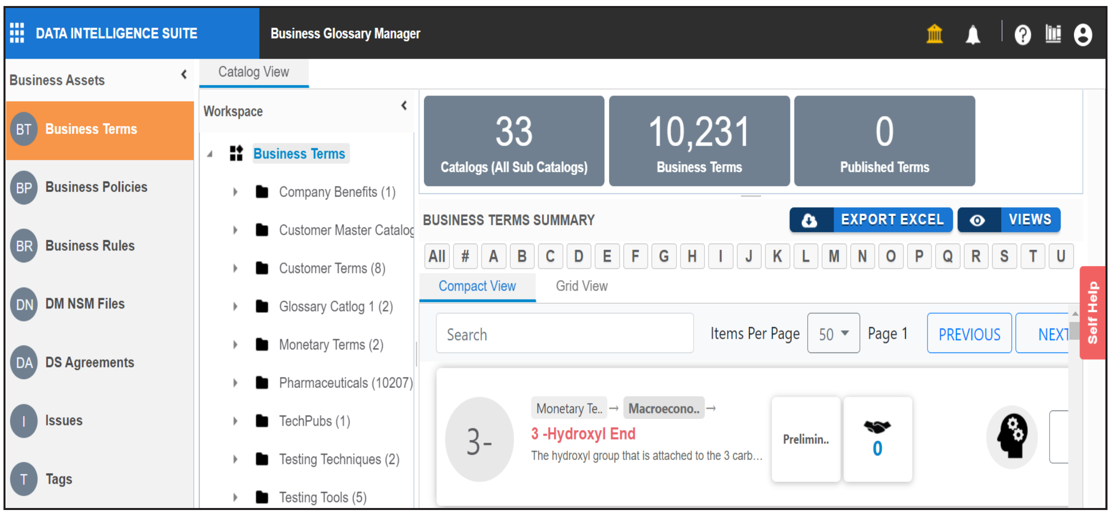
Executing workflows involves:

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

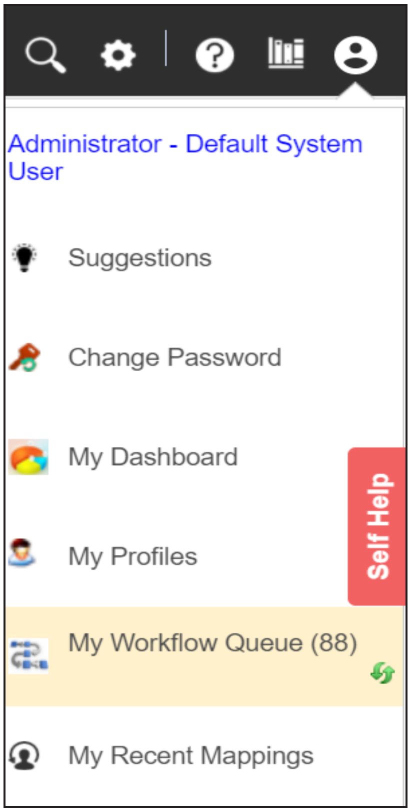
To execute workflows for the business terms, follow these steps:

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

   The following page appears.

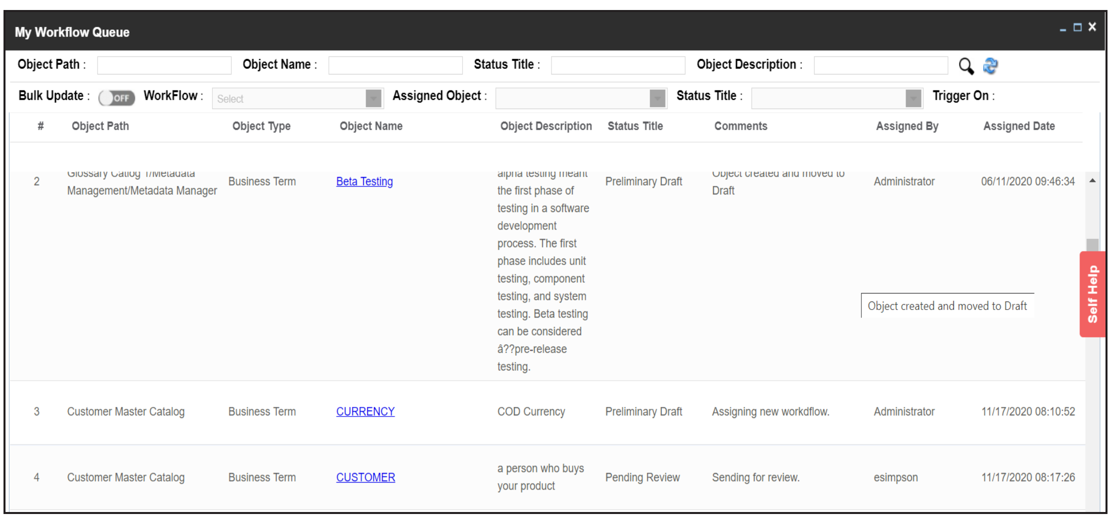
   

2. Click .



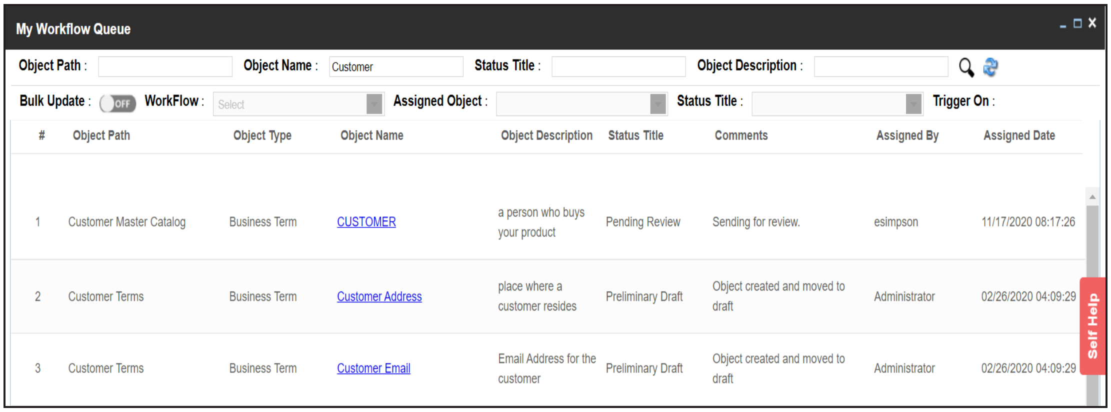
3. Click **My Workflow Queue**.

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



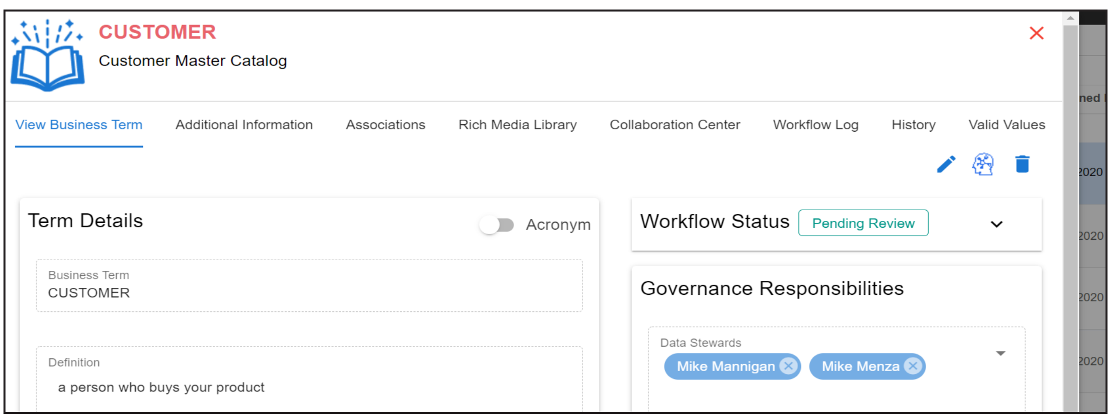
4. Search the required object. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search result appears.



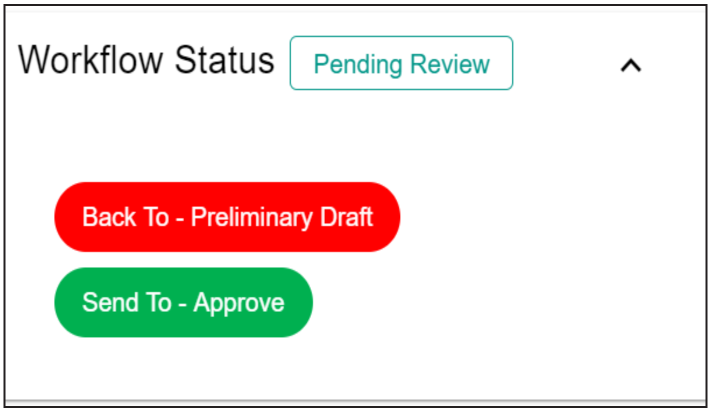
5. Click the <Object_Name> appearing as a hyperlink.

   The <Business_Term> page appears.



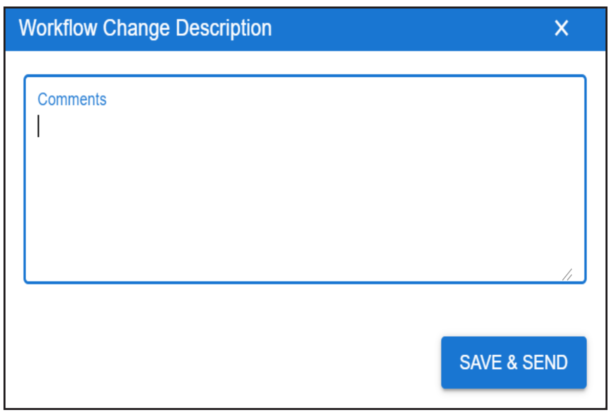
6. Click the **Workflow Status** drop down.

   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

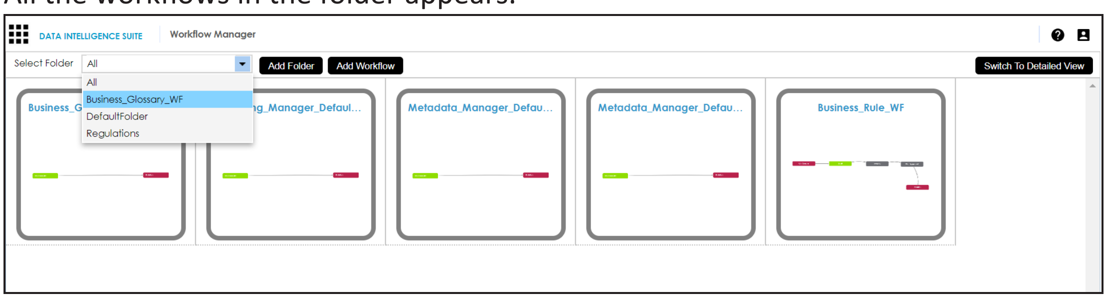
After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to business rules in the Business Glossary Manager.

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.

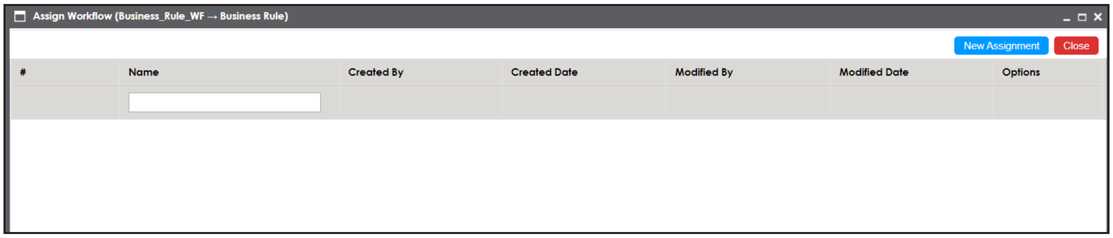
To assign workflows to business rules, follow these steps:

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



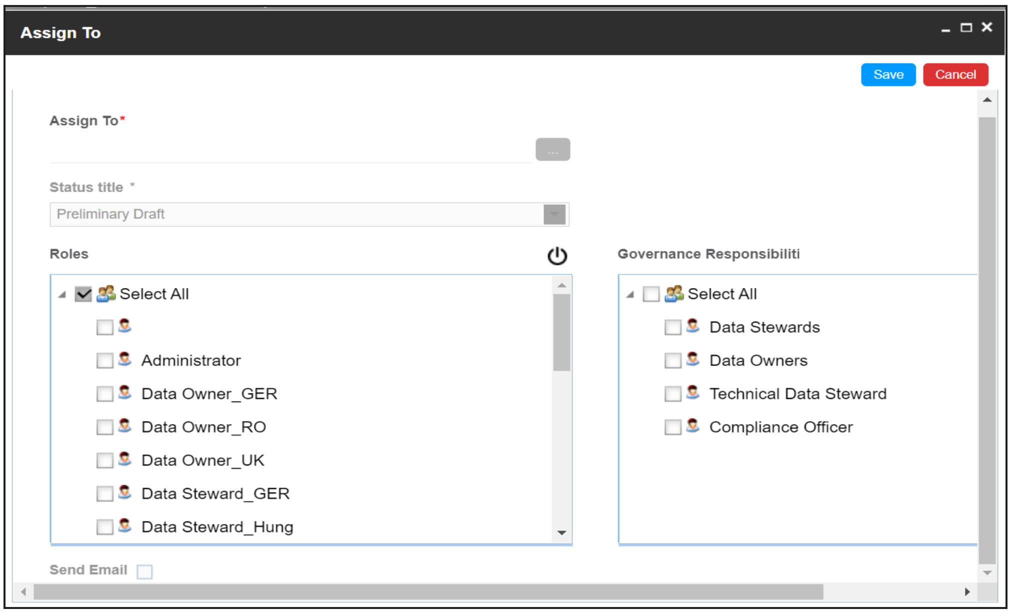
3. Hover over a workflow and click .

   The Assign Workflow page appears.



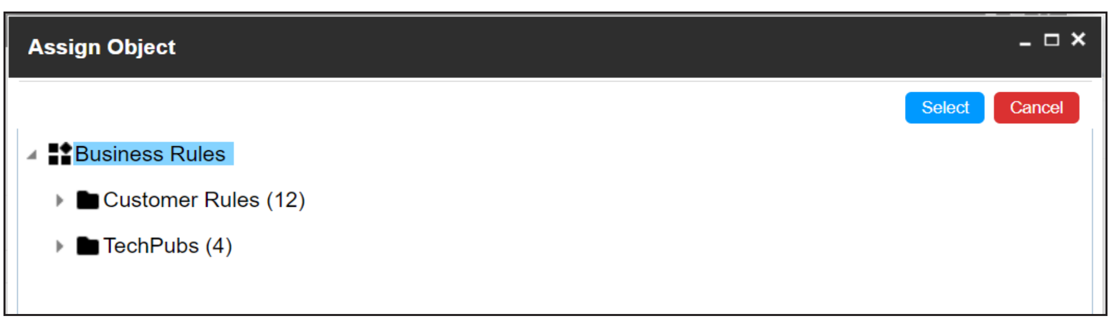
4. Click **New Assignment**.

   The Assign To page appears.

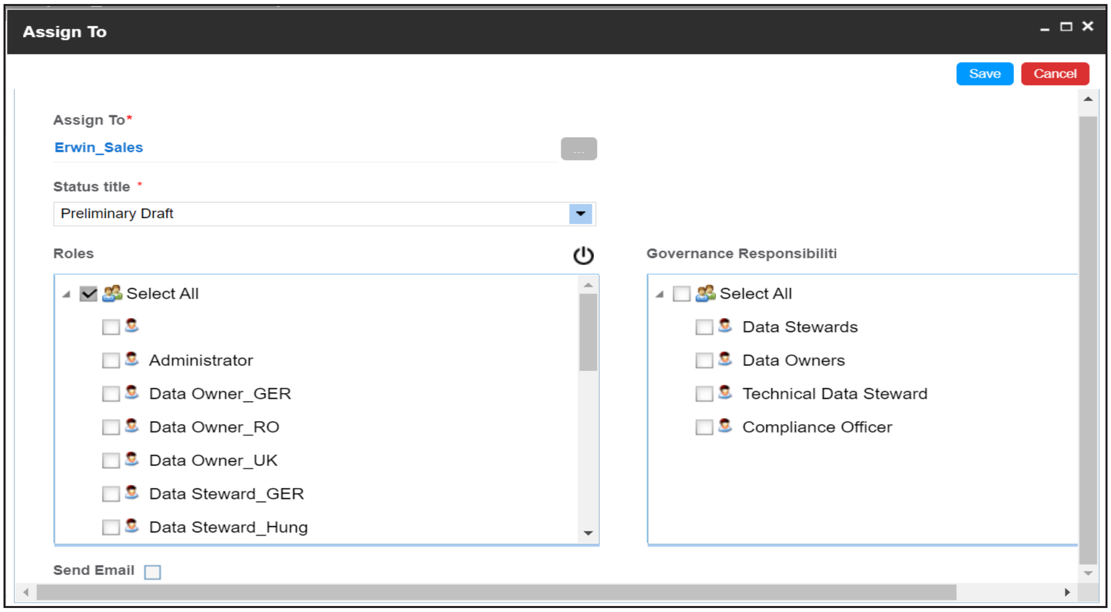


5. In the **Assign To** field, click .

   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.

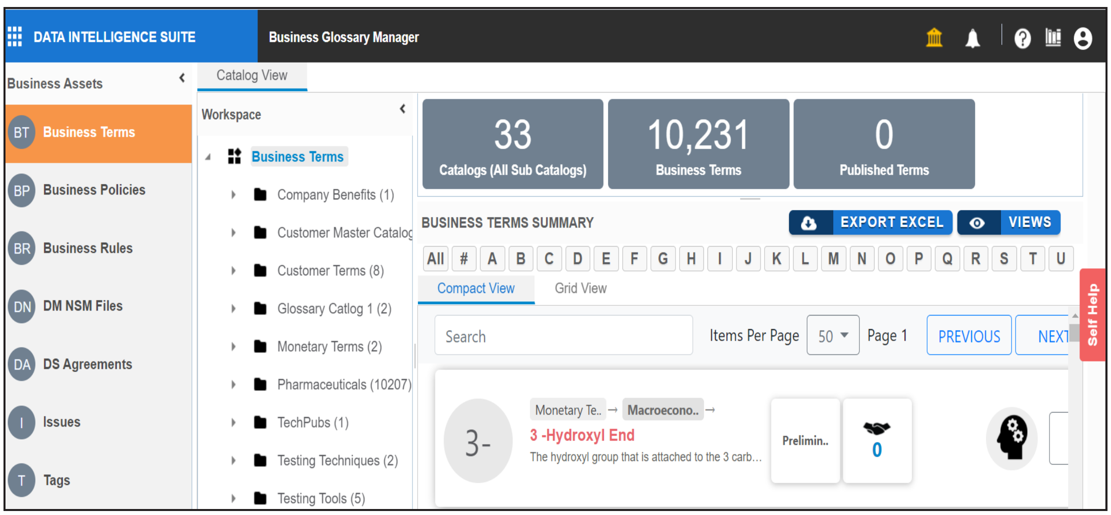
Executing workflows involves:

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.

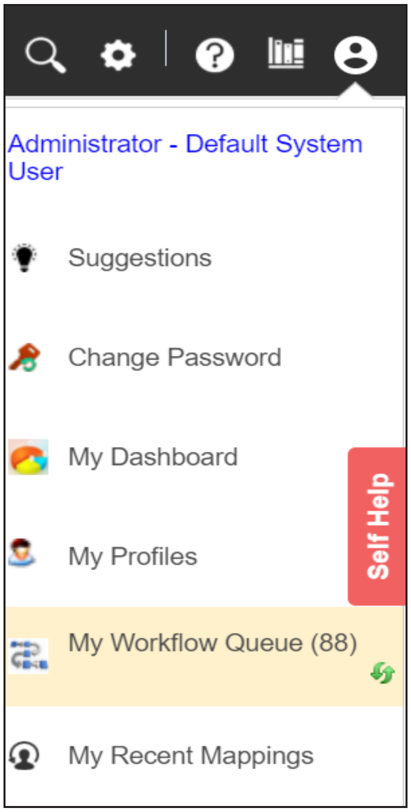
To execute workflows for business rules, follow these steps:

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



2. Click .

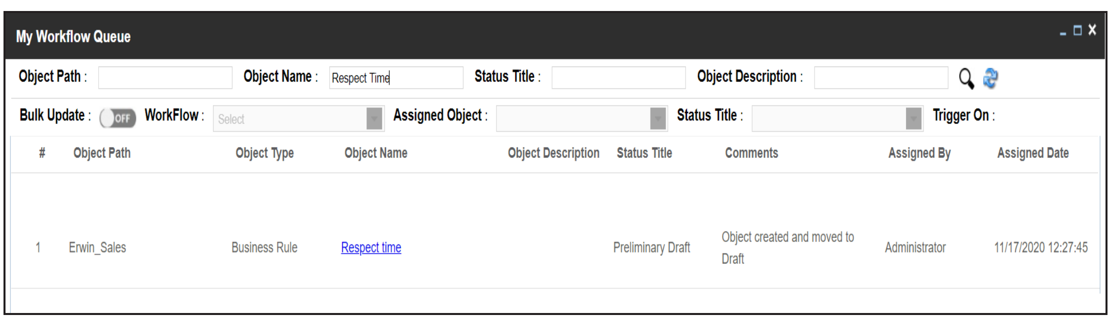
   The available options appear.



3. Click **My Workflow Queue**.

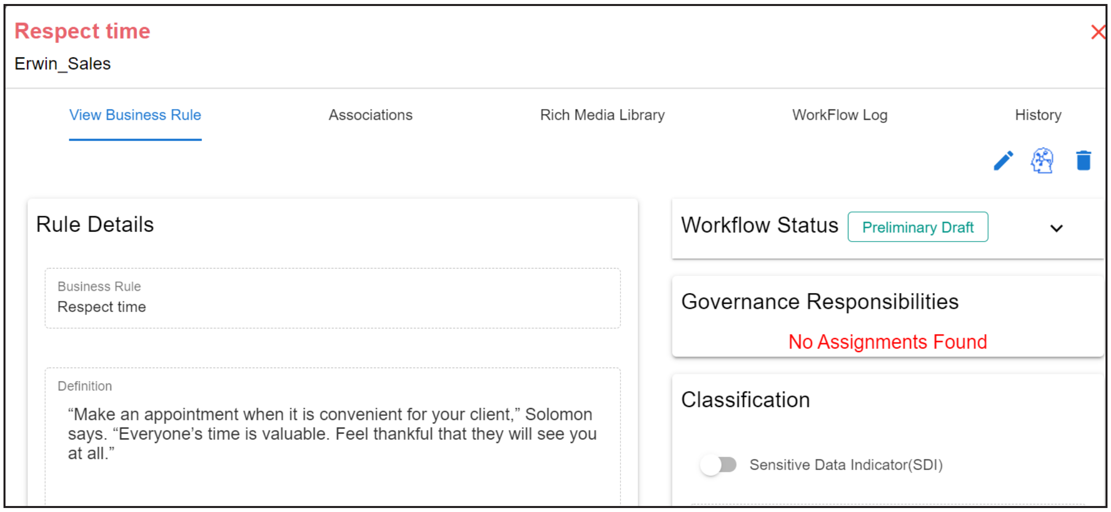
   The My Workflow Queue page appears. It displays workflow queues.

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



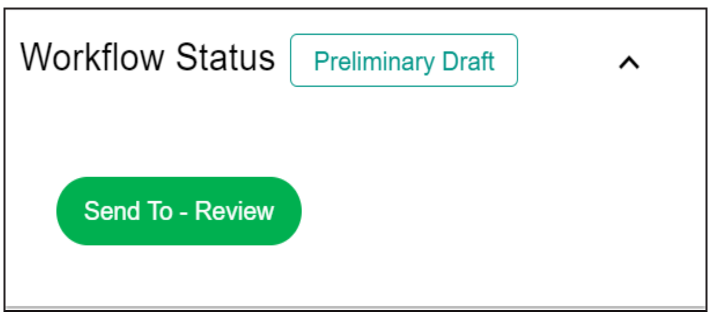
4. Click the <Object Name> appearing as a hyperlink.

   The <Business_Rule> page appears.



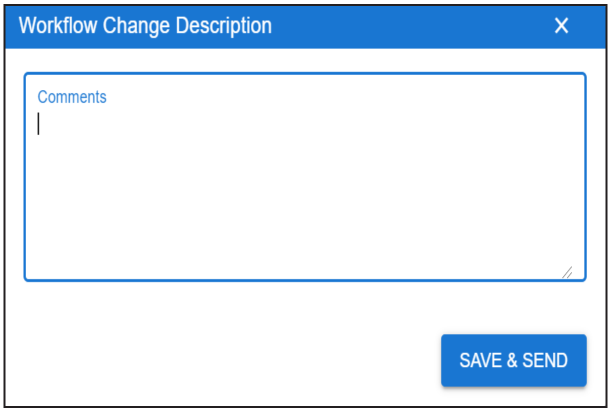
5. Click the **Workflow Status** drop down.

   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.

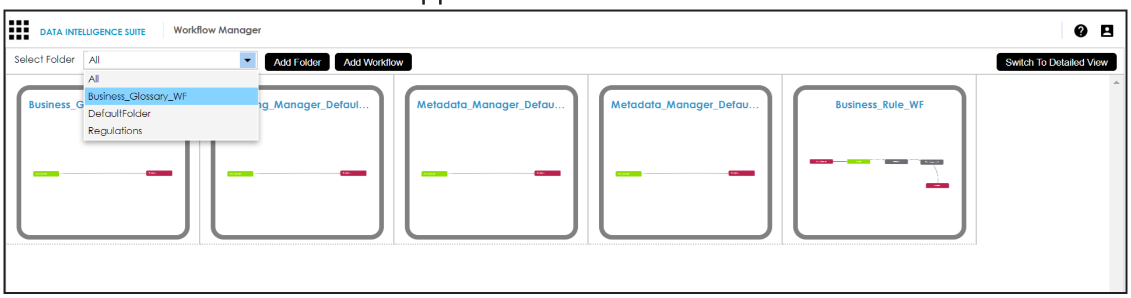
Before you assign workflows to business policies:

- 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.

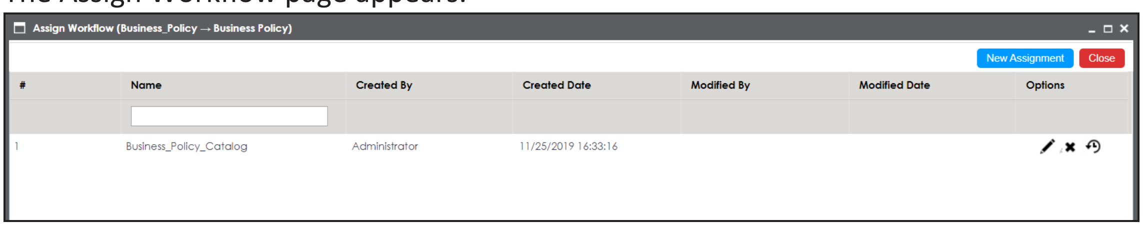
To assign workflows to business policies, follow these steps:

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



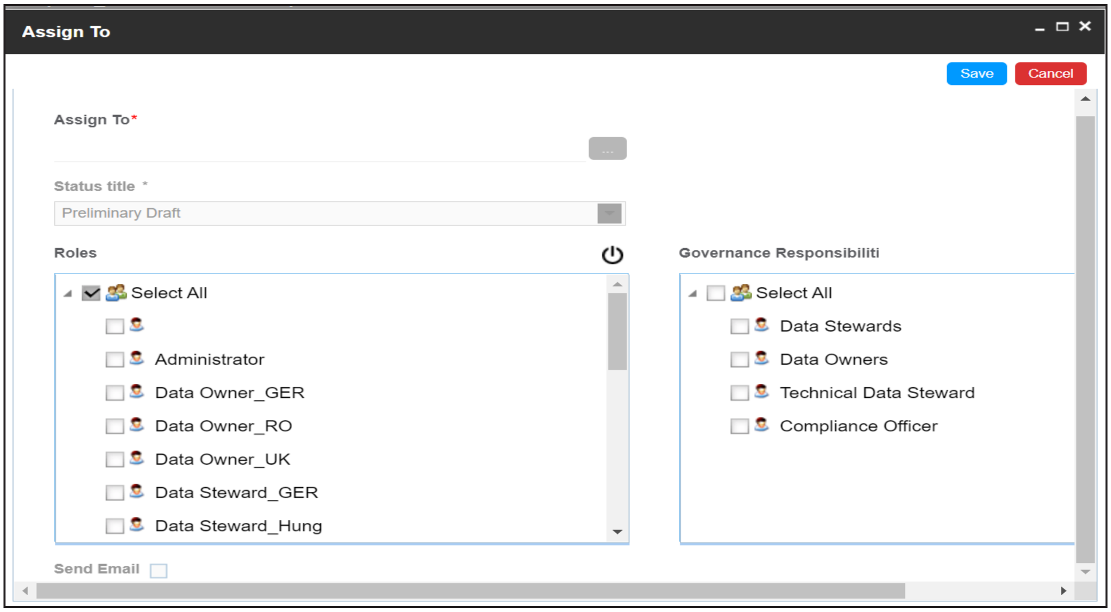
3. Hover over a workflow and click ⊕.

   The Assign Workflow page appears.



4. Click **New Assignment**.

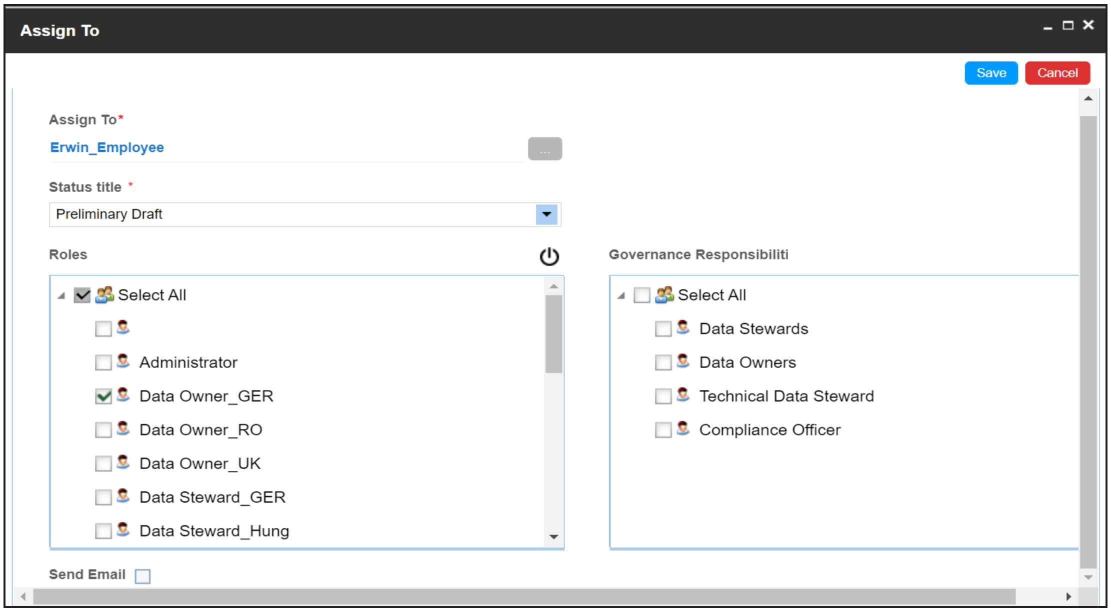
   The Assign To page appears.



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.

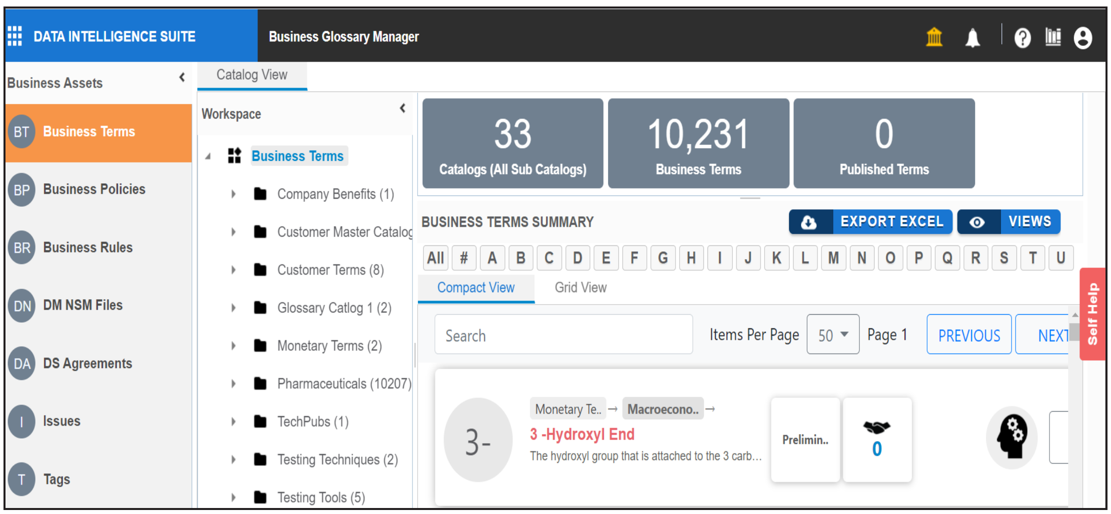
Once the workflow is assigned to the business policy, it can be executed via the Workflow Queue.

Executing workflows involves:

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

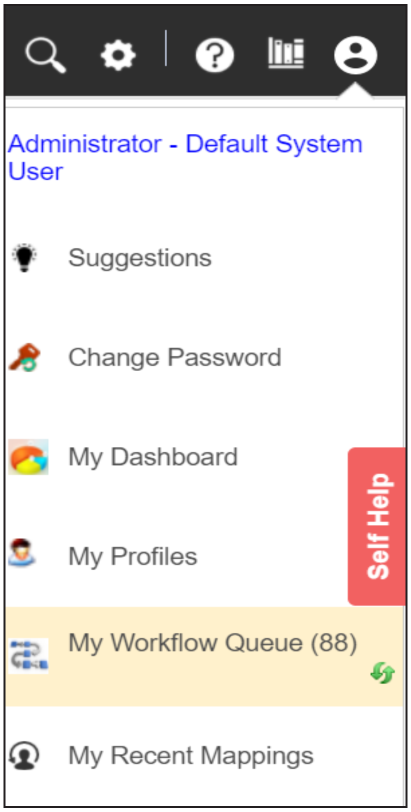
To execute workflows for business policies, follow these steps:

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



2. Click .

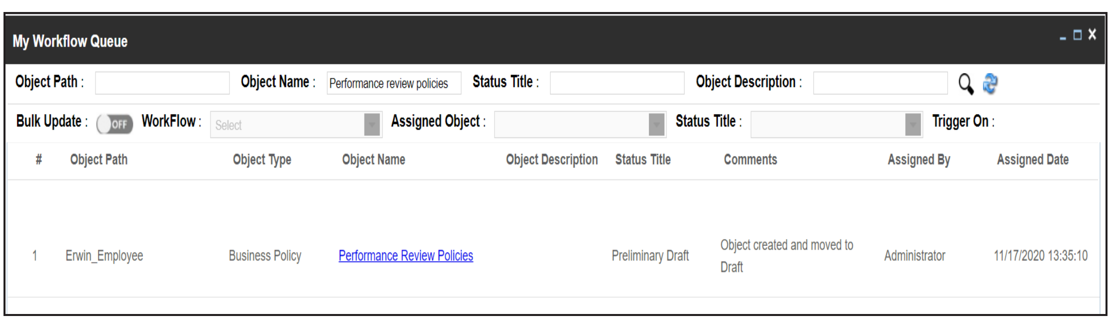
   The available options appear.



3. Click **My Workflow Queue**.

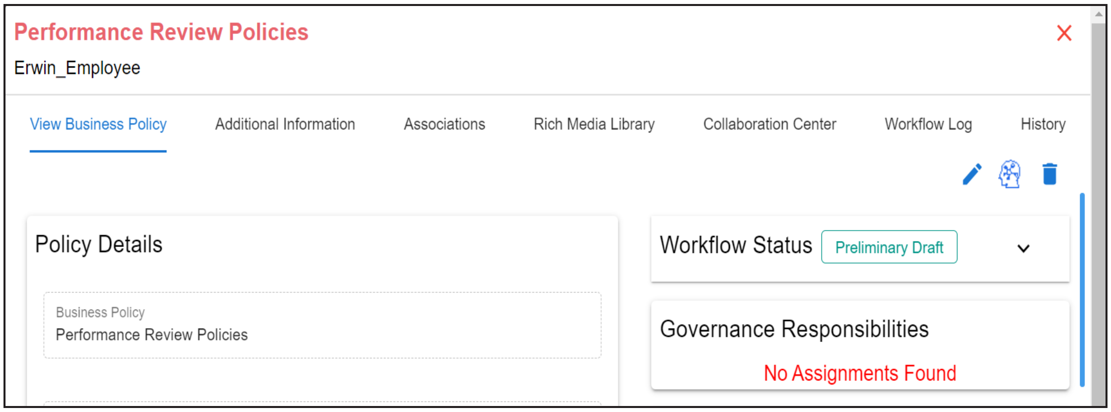
   The My Workflow Queue page appears showing workflow queues of the logged in user.

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



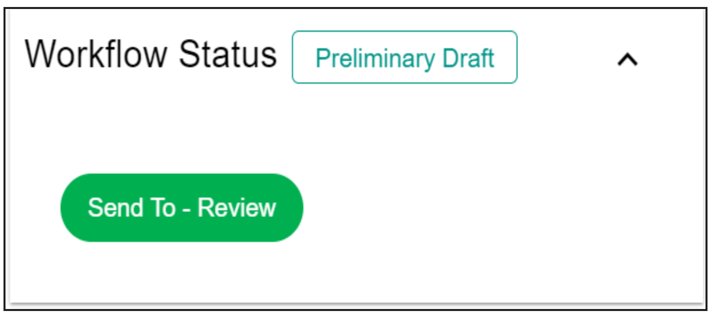
4. Click the **<Object Name>** appearing as a hyperlink.

The <Business_Policy> page appears.



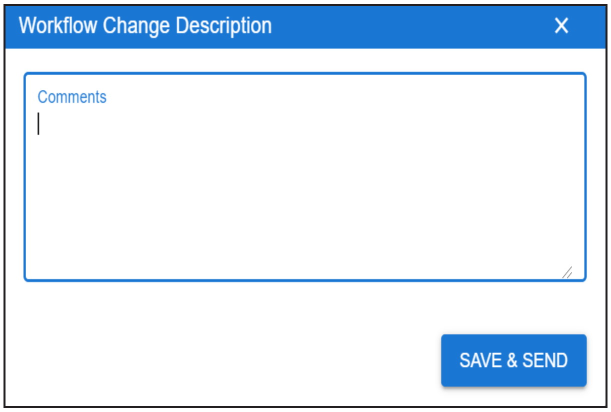
5. Click the **Workflow Status** drop down.

   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.