



erwin Data Intelligence

Workflow Management Guide

Release v12.0

Legal Notices

This Documentation, which includes embedded help systems and electronically distributed materials (hereinafter referred to as the Documentation), is for your informational purposes only and is subject to change or withdrawal by Quest Software, Inc and/or its affiliates at any time. This Documentation is proprietary information of Quest Software, Inc and/or its affiliates and may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of Quest Software, Inc and/or its affiliates

If you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all Quest Software, Inc and/or its affiliates copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to Quest Software, Inc and/or its affiliates that all copies and partial copies of the Documentation have been returned to Quest Software, Inc and/or its affiliates or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, QUEST SOFTWARE, INC. PROVIDES THIS DOCUMENTATION AS IS WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL QUEST SOFTWARE, INC. BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF QUEST SOFTWARE, INC. IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is Quest Software, Inc and/or its affiliates Provided with Restricted Rights. Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright© 2022 Quest Software, Inc. and/or its affiliates All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

Contact erwin

Understanding your Support

Review [support maintenance programs and offerings](#).

Registering for Support

Access the [erwin support](#) site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for [erwin Data Intelligence \(erwin DI\)](#), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit <http://erwin.com/>.

Provide Feedback

If you have comments or questions, or feedback about erwin product documentation, you can send a message to distechpubs@erwin.com.

erwin Data Modeler News and Events

Visit www.erwin.com to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

Contents

Managing Workflows	7
Using Workflow Manager	8
Adding Folders	10
Edit Folders	11
Delete Folders	11
Adding Workflows	13
Edit Workflows	15
Delete Workflows	15
Configuring Workflows	17
Creating Stages	17
Adding Stages to Workflows	19
Deleting Stages	21
Managing Stages	23
Managing Mapping Manager Workflows	26
Assigning Workflows to Projects	27
Executing Workflows	33
Managing Metadata Manager Workflows	37
Assigning Workflows to Environments	38
Executing Workflows for Environments	43
Assigning Workflows to Tables	47
Executing Workflows for Tables	52
Assigning Workflows to the Columns	56

Executing Workflows for Columns	61
Managing Business Glossary Manager Workflows	65
Assigning Workflows to Business Terms	66
Executing Workflows for Business Terms	70
Assigning Workflows to Business Rules	75
Executing Workflows for Business Rules	78
Assigning Workflows to Business Policies	82
Executing Workflows for Business Policies	85

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.

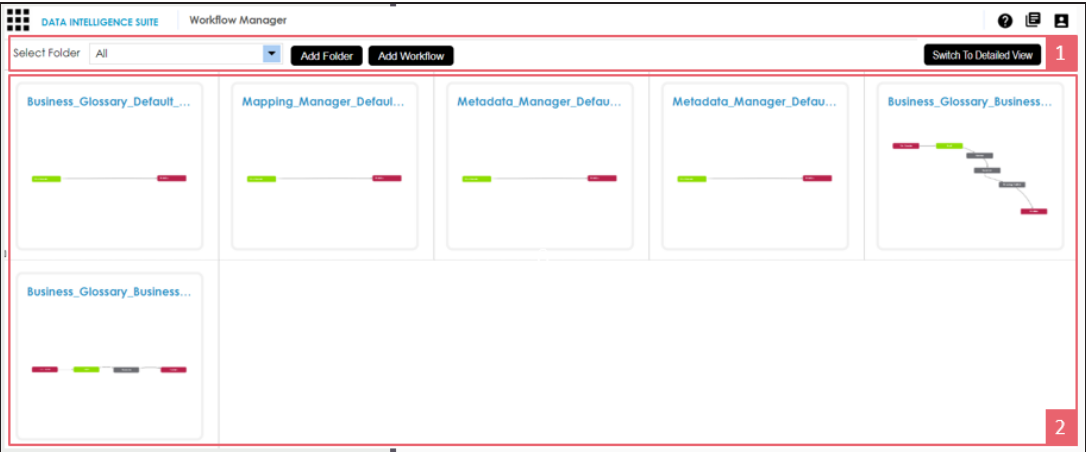
Also, you can create a collection of workflows and assign those workflows to any module based on the requirement.

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 foldersAdd foldersAdd workflowsSwitch 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](#)

Using Workflow Manager

- [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:

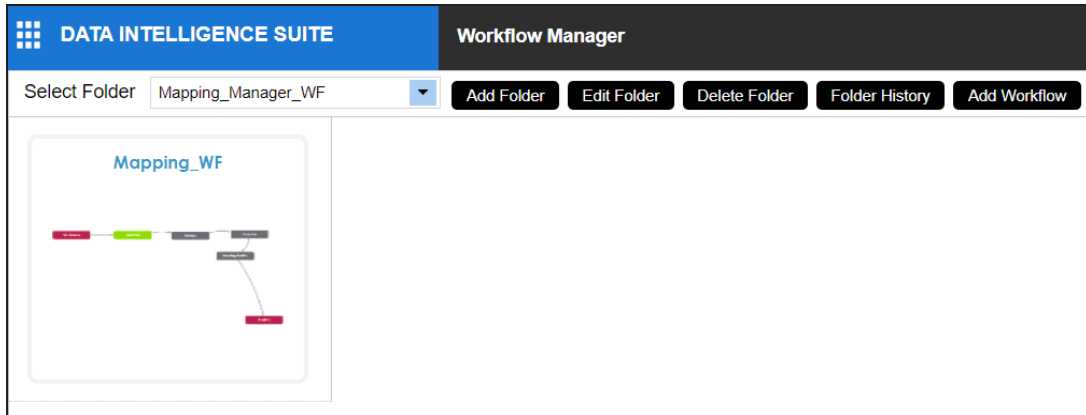
- [Add workflows](#)
- [Edit folders](#)
- [Delete folders](#)

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.



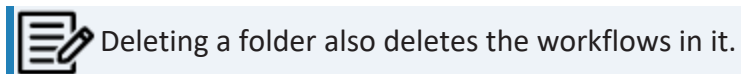
3. Click **Save**.

Delete Folders

To delete a folder, follow these steps:

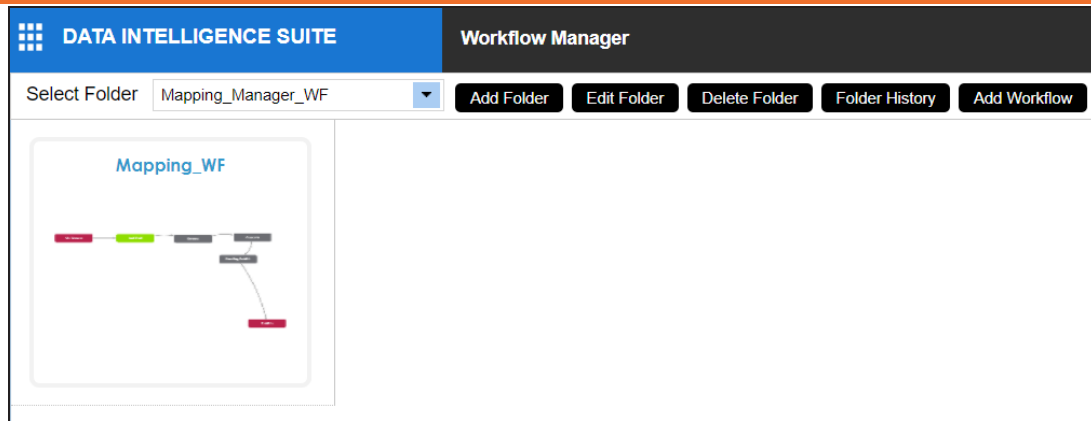
1. In the utility pane, select a folder.
2. Click **Delete Folder**.

A warning message appears.



Deleting a folder also deletes the workflows in it.

Adding Folders



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.

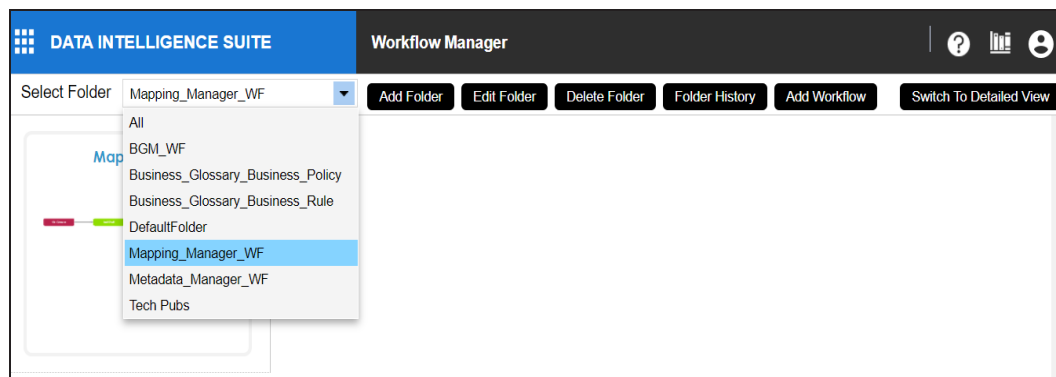
These workflows can be triggered automatically based on the requirements for:

- Business Glossary Manager
- Metadata Manager
- Mapping Manager

To add workflows, follow these steps:

1. On 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.

Adding Workflows

Add Workflow

Folder *
Mapping_Manager_WF

Module *
Select

Object *

Trigger Type *

Name *

Description
[Rich text editor toolbar and text area]

Save Cancel

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 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.

Adding Workflows

4. Click **Save**.

The workflow is added to the folder.

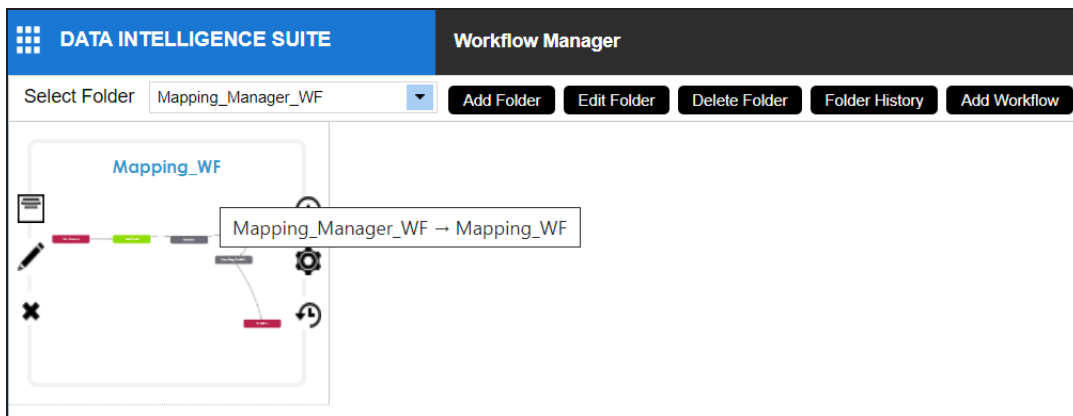
Once a workflow is added, you can:


- [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.



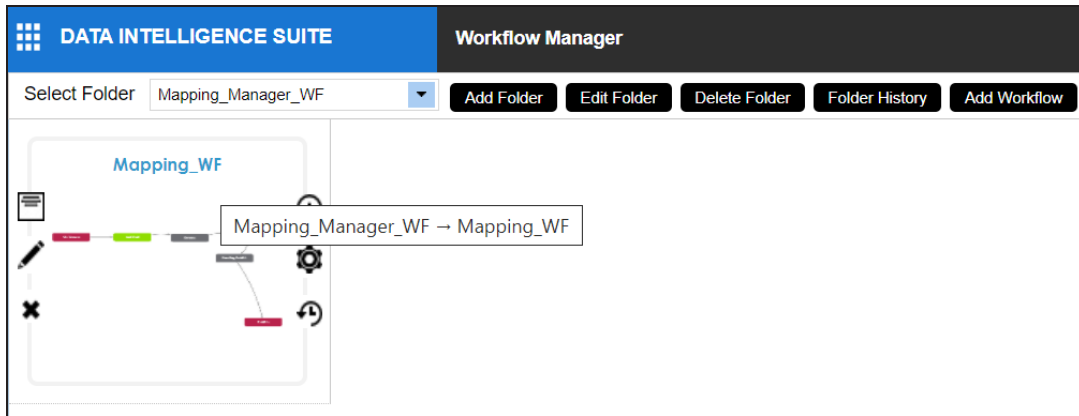
3. Click .
The Edit Workflow page appears.
4. Click the **Folder** drop-down to choose a different folder for the workflow.
5. Update other necessary fields and click **Save**.
The workflow is updated.

Delete Workflows

To delete a workflow, follow these steps:

Adding Workflows

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.

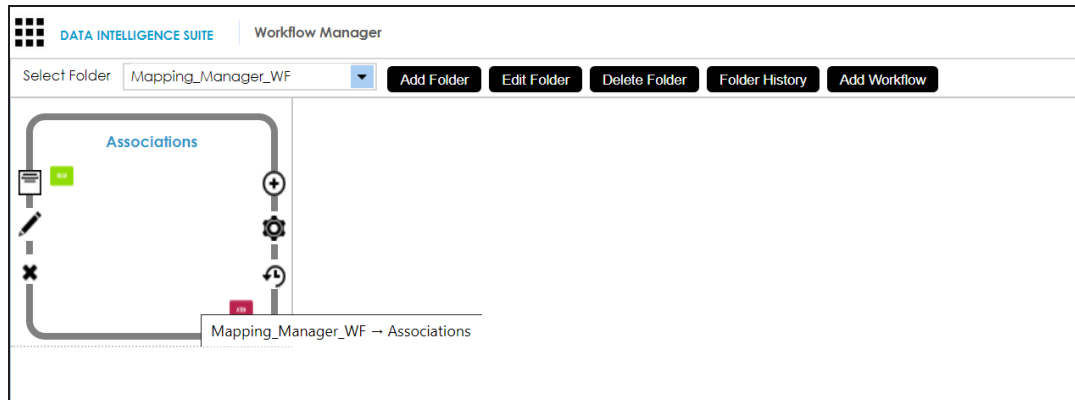
Configuring Workflows

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:

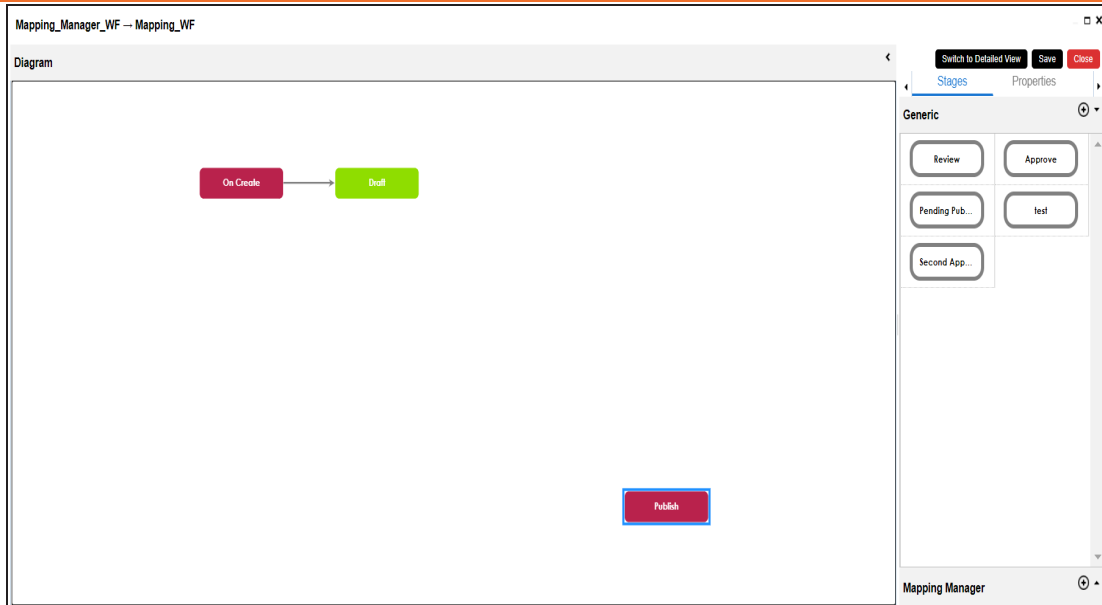
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.
The workflow pane displays a list of workflows.
3. Hover over a workflow.



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.

Configuring Workflows



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

The Add Stage page appears.

The screenshot shows the 'Add Stage' form. It has three main fields: 'Name', 'Status title', and 'Description'. The 'Name' field is a text input with a red asterisk and a red error message 'Stage Name is a required field'. The 'Status title' field is a text input with a red asterisk and a red error message 'Status title is a required field'. The 'Description' field is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and other formatting options. At the top right of the form, there are 'Next' and 'Cancel' buttons.

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

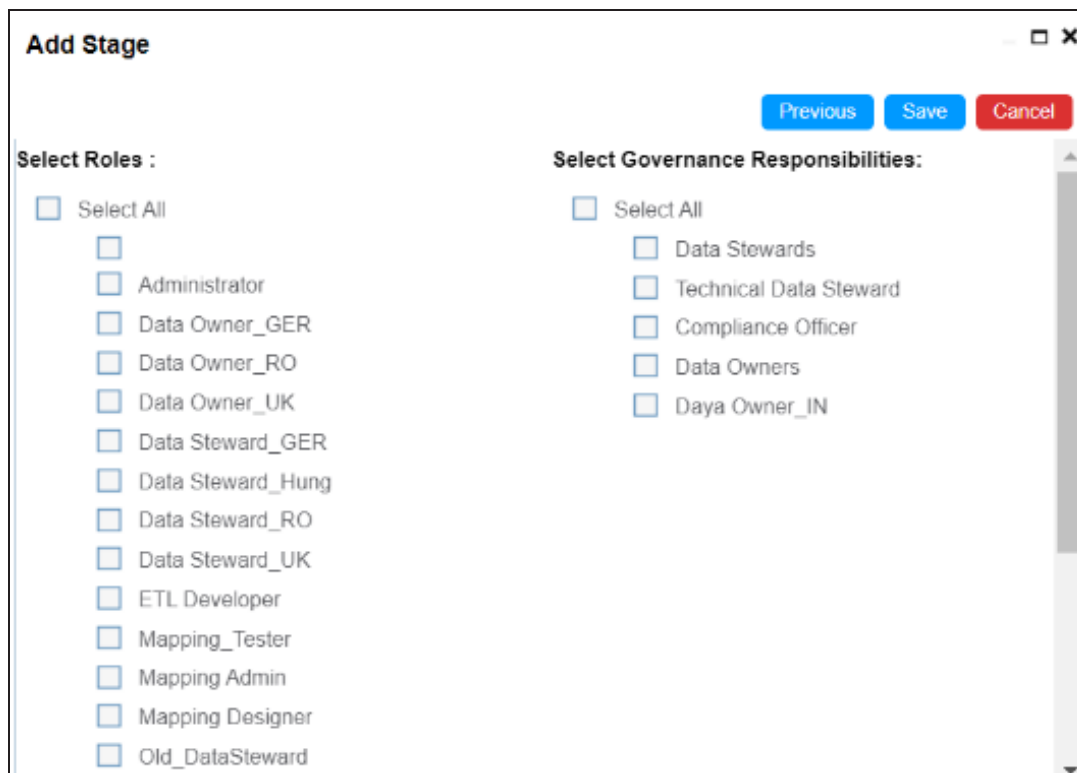
For example:

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

Configuring Workflows

- Click **Next**.

The Add Stage page appears.



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

- Select the required roles and roles groups.
- Click **Save**.

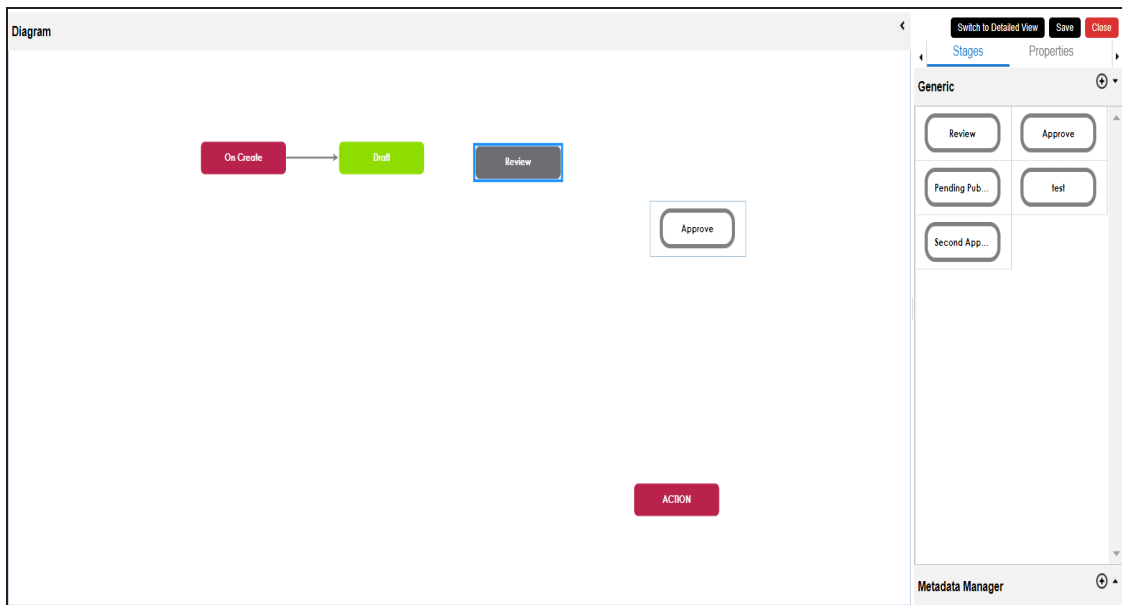
The generic stage is created. You can create as many generic stages you want and assign roles to each stage.

Adding Stages to Workflows

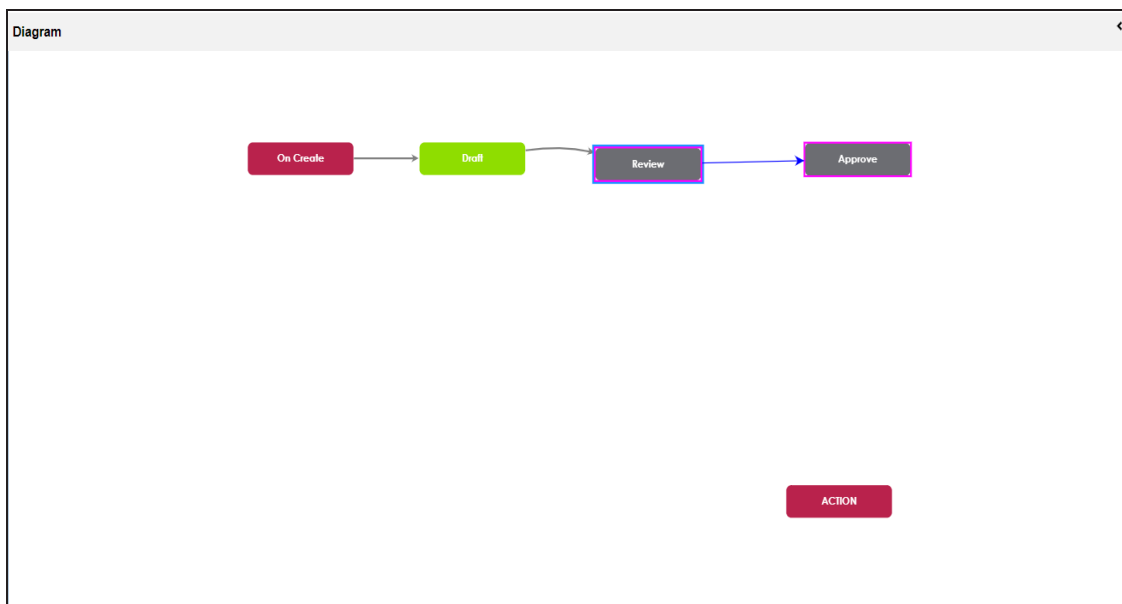
To add generic stages to workflows, follow these steps:

Configuring Workflows

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



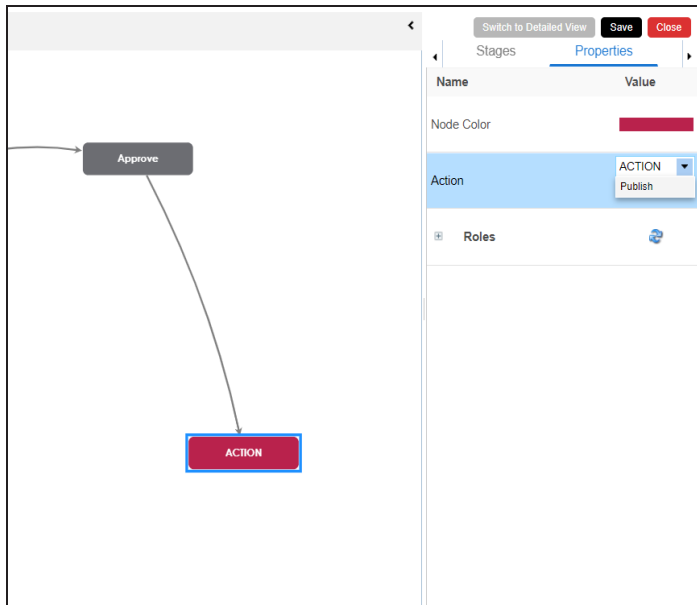
2. Drag the cursor from one stage to the next stage to connect the two stages.



3. In the **Diagram** pane, select the **Action** block stage, and then click the **Properties** tab.

Configuring Workflows

4. Double-click the cell under the **Value** column against **Action** and select **Publish**.



5. Expand the **Roles** node and select appropriate roles.
6. Click **Save**.

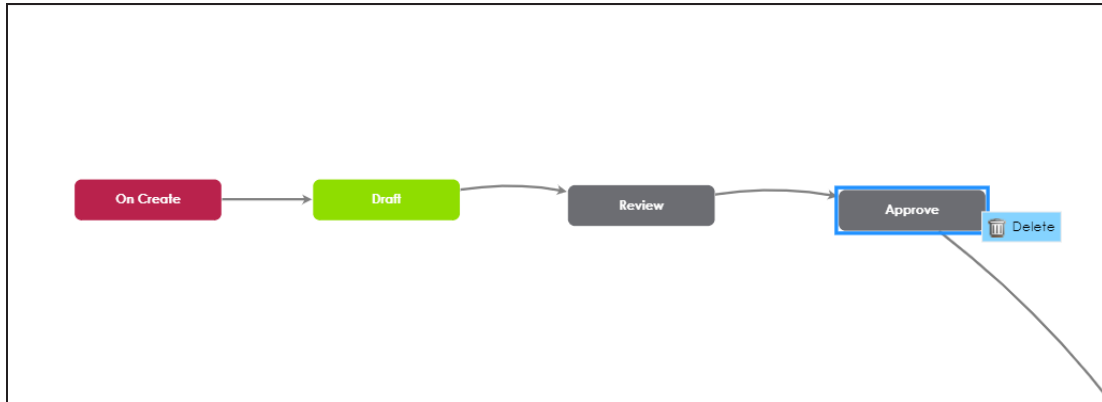
The workflow is configured and saved.

Deleting Stages

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

Configuring Workflows

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.

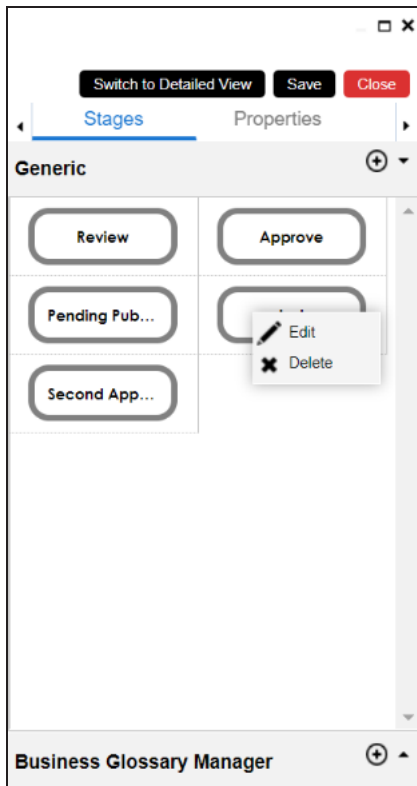
Managing Stages

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:

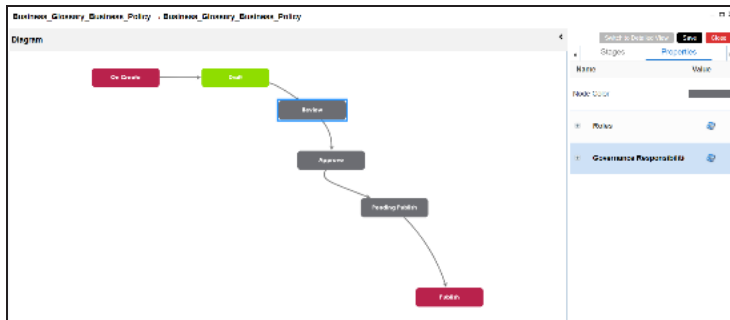
Edit

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

Click **Edit**.

Managing Stages

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.

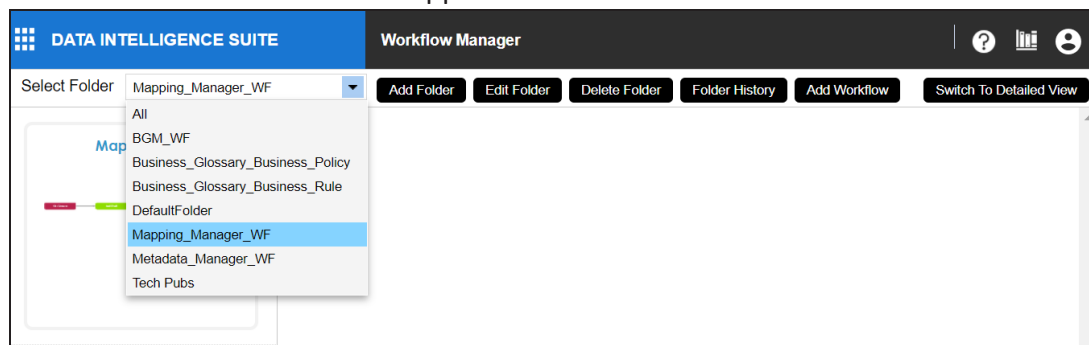
Before you assign workflows to a project:

- 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:

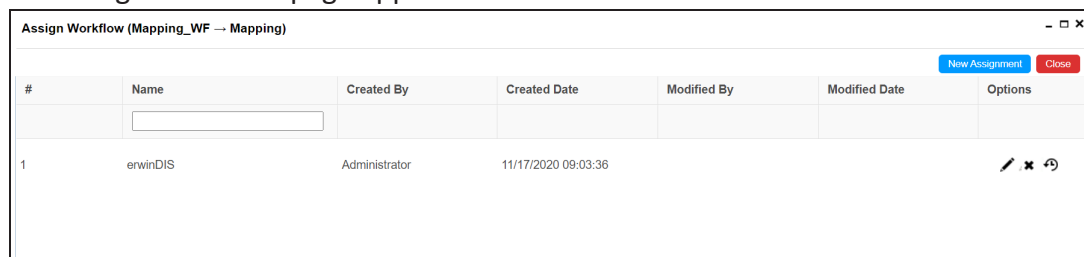
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



3. Hover over the required workflow, and click .

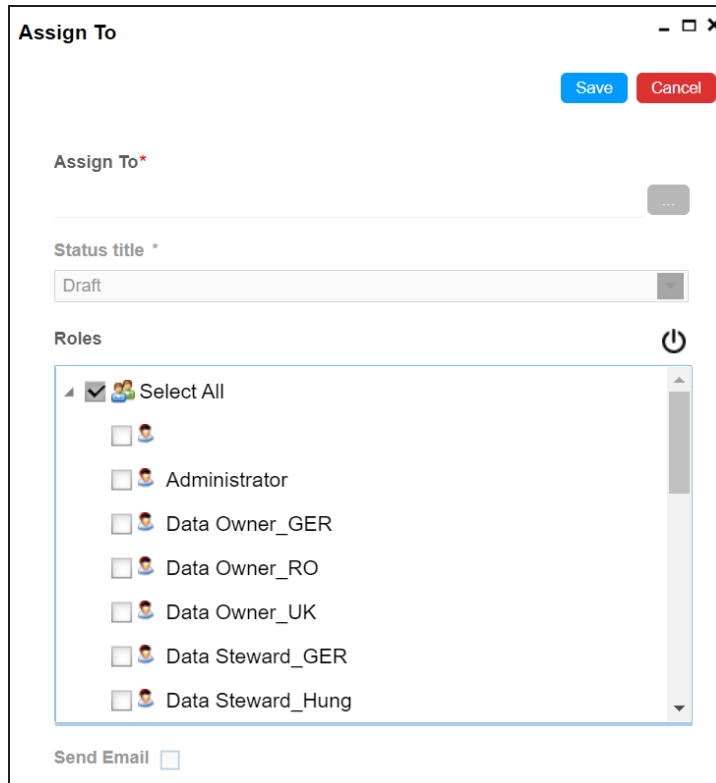
The Assign Workflow page appears.



Assigning Workflows to Projects

4. Click **New Assignment**.

The Assign To page appears.

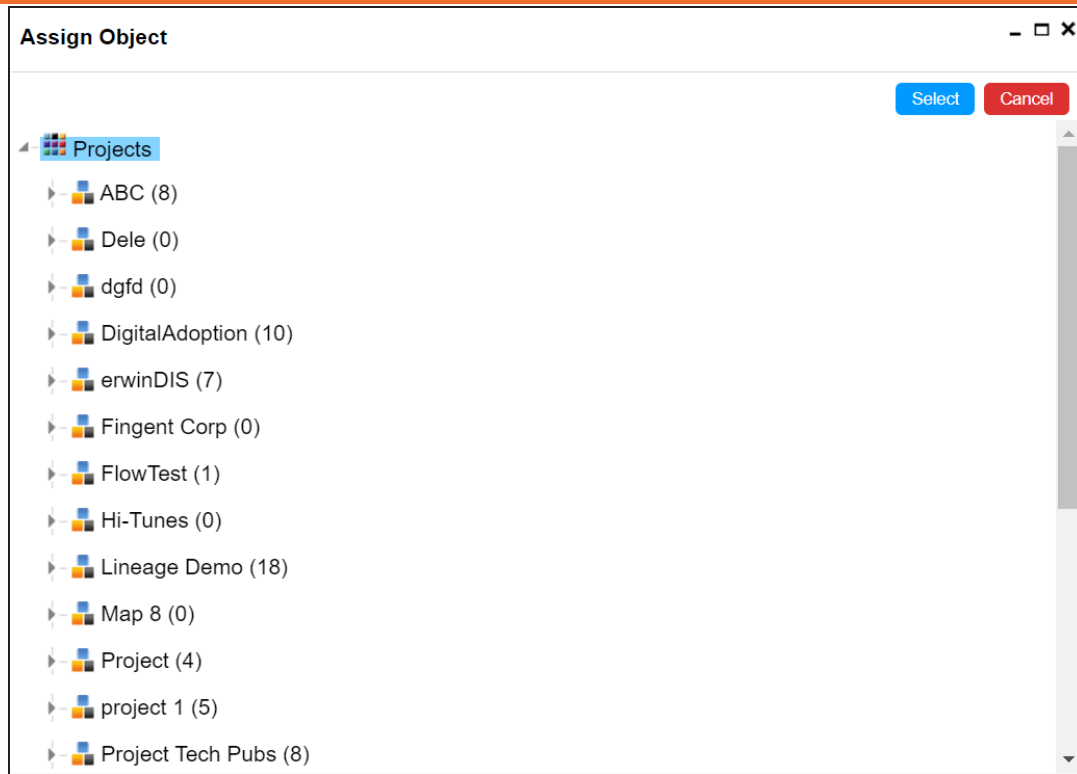


The screenshot shows a dialog box titled "Assign To" with a close button (X) in the top right corner. Inside the dialog, there are two buttons: "Save" (blue) and "Cancel" (red). Below these buttons is a text field labeled "Assign To*" with a dropdown arrow on the right. Underneath is a "Status title *" dropdown menu currently set to "Draft". Below that is a "Roles" section with a power icon on the right. The roles list includes a "Select All" option with a checked checkbox and a list of roles: Administrator, Data Owner_GER, Data Owner_RO, Data Owner_UK, Data Steward_GER, and Data Steward_Hung, each with an unchecked checkbox. At the bottom left, there is a "Send Email" checkbox.

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

The Assign Object page appears.

Assigning Workflows to Projects



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

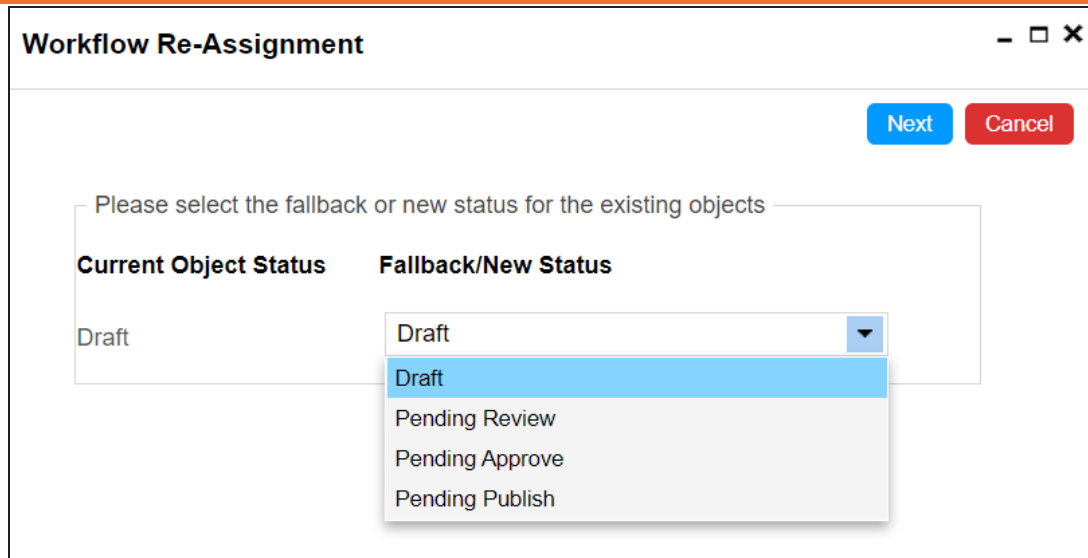
A warning page appears.

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.



The image shows a 'Workflow Re-Assignment' dialog box. At the top right are standard window controls (minimize, maximize, close) and two buttons: 'Next' (blue) and 'Cancel' (red). Below these is a text prompt: 'Please select the fallback or new status for the existing objects'. Underneath is a table with two columns: 'Current Object Status' and 'Fallback/New Status'. The 'Current Object Status' column contains the text 'Draft'. The 'Fallback/New Status' column contains a dropdown menu. The dropdown menu is open, showing a list of options: 'Draft' (highlighted in blue), 'Pending Review', 'Pending Approve', and 'Pending Publish'.

Current Object Status	Fallback/New Status
Draft	<div>Draft Pending Review Pending Approve Pending Publish</div>

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.

Assign To

Save Cancel

Assign To*

DigitalAdoption (10) ...

Status title *

Draft ▼

Roles

◀ ☐ Select All

☐

☐ Administrator

☐ Data Owner_GER

☐ Data Owner_RO

☐ Data Owner_UK

☐ Data Steward_GER

☐ Data Steward_Hung

Send Email ☐

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.

Assigning Workflows to Projects

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.

DATA INTELLIGENCE SUITE

Mapping Manager

Search

Workspace Mappings

Mappings

Transformations

Projects

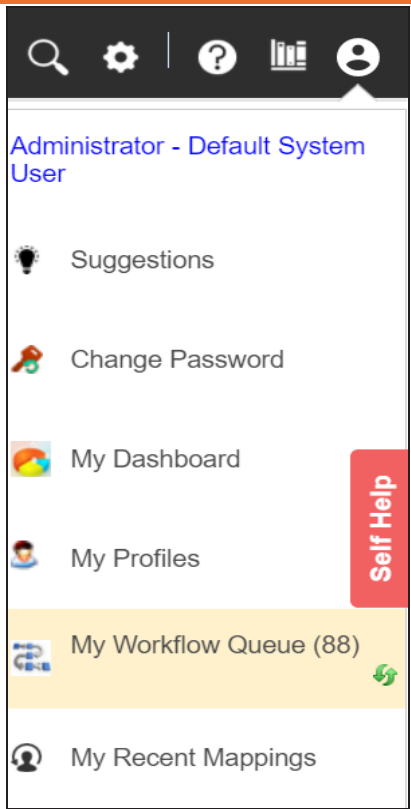
ABC (2)

dgdf (0)

Project Summary

#	Project Name	Project Description	Project Owner	Subject Count	Mapping Count	Created By	Created Date Time	Last Modified By	Last Modified Time
	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>				
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="radio"/> OFF		WorkFlow : <input type="text" value="Select"/>		Assigned Object : <input type="text"/>		Status Title : <input type="text"/>
				Trigger On : <input type="text"/>		<input type="button" value="Update Options"/>
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	Lineage Demo	Mapping	Informatica_m_CBDOR_BDM_CASA		Draft	Object created and moved to draft
2	Lineage Demo	Mapping	Talend_staging		Draft	Object created and moved to draft
3	Lineage Demo	Mapping	test		Draft	Object created and moved to draft
4	Lineage Demo	Mapping	TestDataMap1		Draft	Object created and moved to draft

Executing Workflows

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.

My Workflow Queue						
Object Path :		Object Name :	Erwin	Status Title :		Object Description :
Bulk Update :		Workflow :	Select	Assigned Object :		Trigger On :
				Status Title :		Update Options :
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	erwinDIS	Mapping	erwinSalesIntegration		Draft	Assigning new workflow.
2	Project Tech Pubs	Mapping	erwinSalesIntegration		Draft	Object created and moved to Draft

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

The Map View page appears.

Map View

[Map Spec Overview](#) | Map Spec Grid | Source Extract Sql | Target Update Strategy | Testing Notes | Map Spec Docs | Assignments | Specification Artifacts

Map Id

104

Workflow Status

Draft

Specification Name

[erwinSalesIntegration](#)

Map Specification Version

1.01

Version Label

State Name

Approved

Sub State Name

Sync Source Metadata

ON

Sync Target Metadata

ON

Job Name XRef

Mapping Description

Assigned To

Created By

Administrator

Created Date Time

2020-05-19 08:49:28.127

Modified By

ksridhar

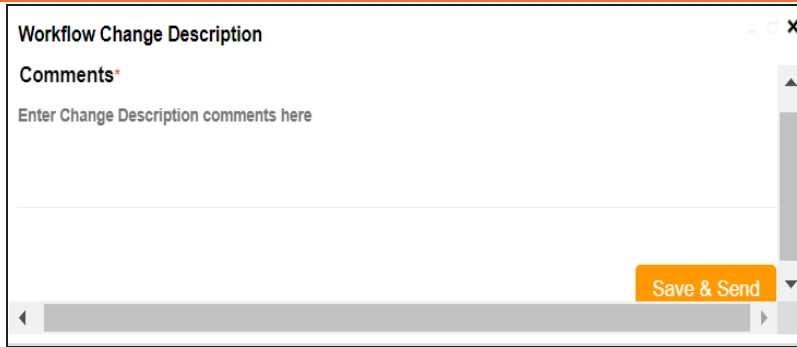
Modified Date Time

2020-10-14 08:02:07.943

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

The Workflow Change Description page appears.

Executing Workflows



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.

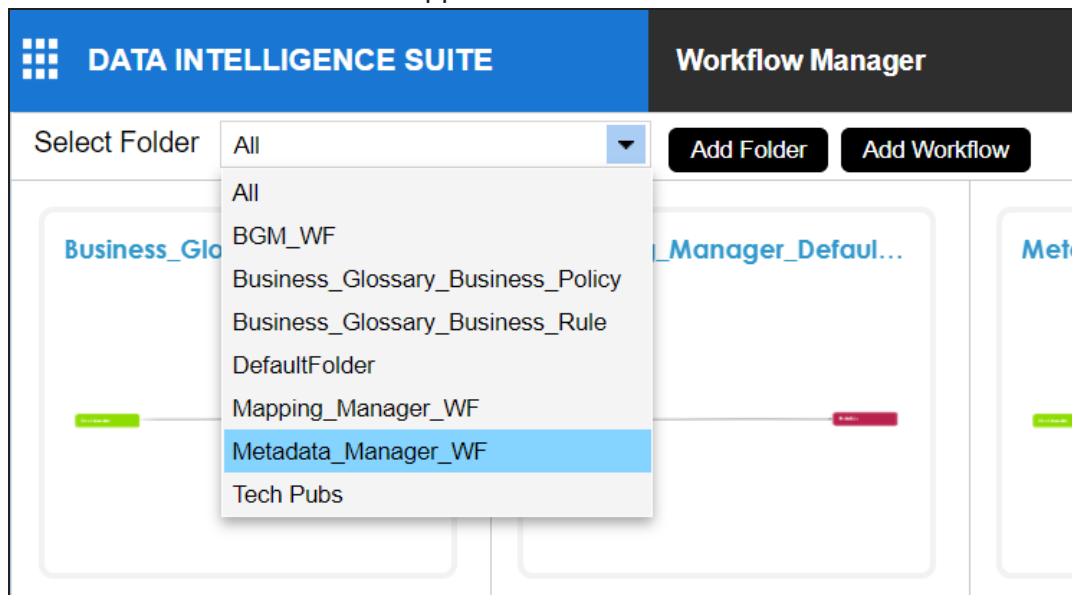
Before you assign workflows to an environment:

- 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 .







Assigning Workflows to Environments

The Assign Workflow page appears.

Assign Workflow (Environment_WF -- Environment)

New Assignment

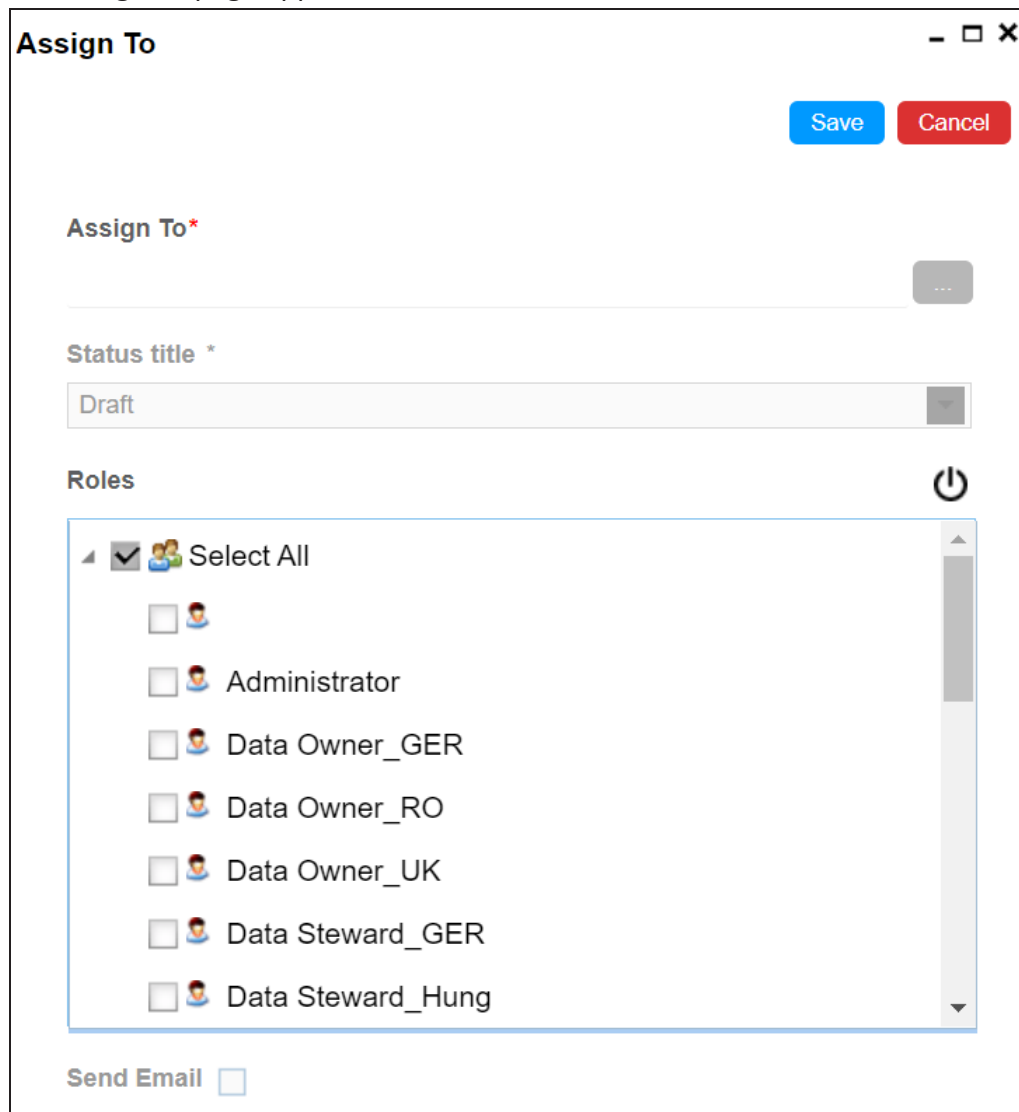
Close

#	Name	Created By	Created Date	Modified By	Modified Date	Options
	<input type="text"/>					
1	SQL System	Administrator	11/17/2020 09:15:16			  
2	erwin DM	Administrator	06/01/2021 12:06:57			  

3. Click **New Assignment**.

Assigning Workflows to Environments

The Assign To page appears.

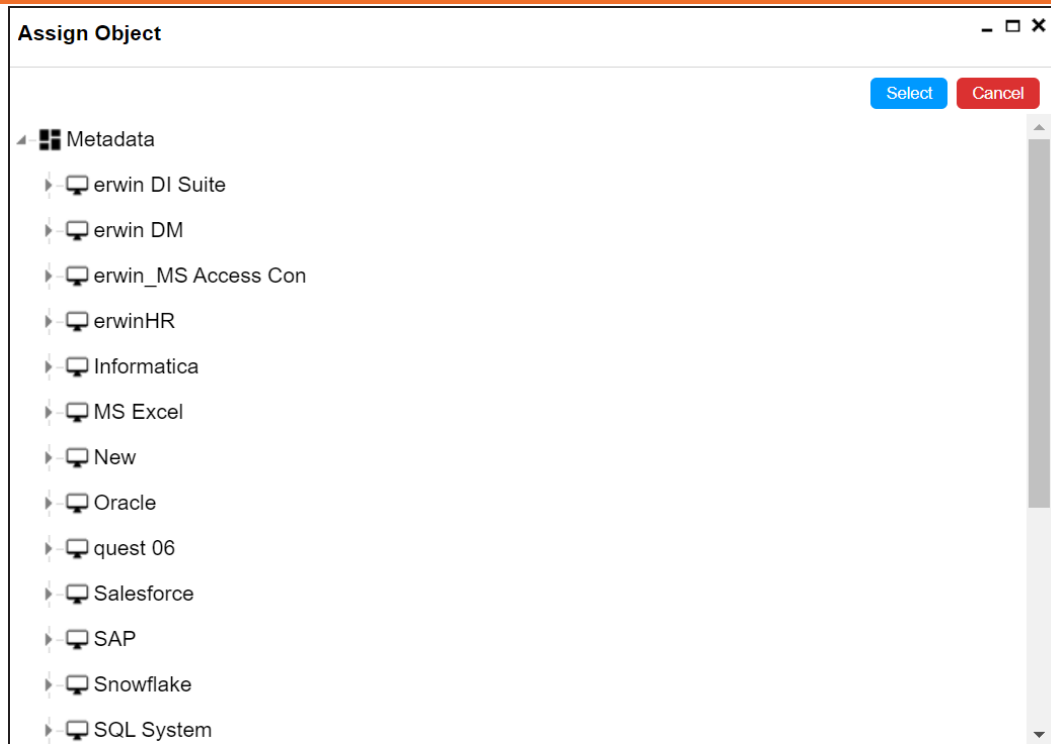


The screenshot shows a dialog box titled "Assign To" with standard window controls (minimize, maximize, close) in the top right corner. Below the title bar, there are two buttons: "Save" (blue) and "Cancel" (red). The main content area contains three sections: 1. "Assign To*" with a text input field and a grey button with three dots to its right. 2. "Status title *" with a dropdown menu currently showing "Draft". 3. "Roles" with a power icon to its right. The "Roles" section contains a scrollable list with a "Select All" option at the top (indicated by a checked checkbox and a group icon). Below it are several roles, each with an unchecked checkbox and a user icon: "Administrator", "Data Owner_GER", "Data Owner_RO", "Data Owner_UK", "Data Steward_GER", and "Data Steward_Hung". At the bottom of the dialog, there is a "Send Email" label followed by an unchecked checkbox.

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

The Assign Object page appears.

Assigning Workflows to Environments



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

Assigning Workflows to Environments

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.

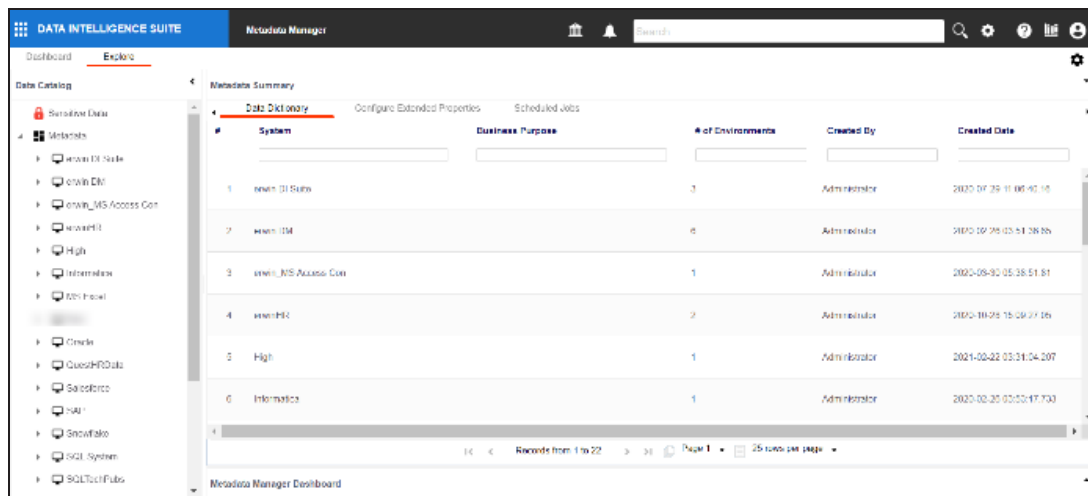
Executing workflows involves:

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 > Explore**.

The following page appears.



System	Business Purpose	# of Environments	Created By	Created Date
1 new BI Suite		3	Administrator	2020-07-28 11:06:40.18
2 new ID		6	Administrator	2020-09-29 03:54:38.85
3 new MS Access Con		1	Administrator	2020-08-30 05:38:51.81
4 new HR		2	Administrator	2020-10-29 15:08:27.05
5 High		1	Administrator	2021-02-22 03:34:04.097
6 Informatica		1	Administrator	2020-02-25 03:00:47.703

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

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


Executing Workflows for Environments

My Workflow Queue

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


Bulk Update : ☐ Off WorkFlow : Select Assigned Object : Status Title : Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwin DM/DM Landing/Employees	Column	EmployeeName		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
2	erwin DM/DM Landing	Table	Employees		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
3	erwin DM/DM Landing	Table	Citizens		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
4	erwin DM/DM Landing/Employees	Column	EmployeeID		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
5	erwin DM/DM Landing/Citizens	Column	CitizenID		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16

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 : sql serverf Status Title : Object Definition : 

Bulk Update : ☐ Off WorkFlow : Select Assigned Object : Status Title : Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments
1	erwin DM	Environment	Sql Server Production		Draft	Object c

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

The Environment View page appears.

Executing Workflows for Environments

The screenshot shows the 'Environment View' window with the 'Configuration Details' tab selected. The 'Status' is 'Draft'. The 'System Environment Name' is 'Sql Server Production'. The 'System Environment Type' is 'Sql Server'. The 'Data Steward' is '-Select Data Steward-'. The 'Server Platform' is 'Apply To All Tables & Columns'. The 'Server OS Version' is empty. The 'File Management Type' is empty. The 'File Location' is empty. The 'Production System Name' is 'Choose Production System'. The 'Production Environment Name' is empty. The 'Driver Name' is 'com.microsoft.sqlserver.jdbc.SQLS'. The 'DBMS Name/DSN' is 'Northwind'. The 'IP Address/Host Name' is 'localhost'. The 'Port' is '1433'. The 'User Name' is 'sa'. The 'Password' is masked with a key icon. The 'Uri' is masked with a key icon. The 'DBMS Instance Schema' is 'dbo'.

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 has a 'Comments' section with the text 'Enter Change Description comments here'. There is a 'Save & Send' button at the bottom right.

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.

Executing Workflows for Environments

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.

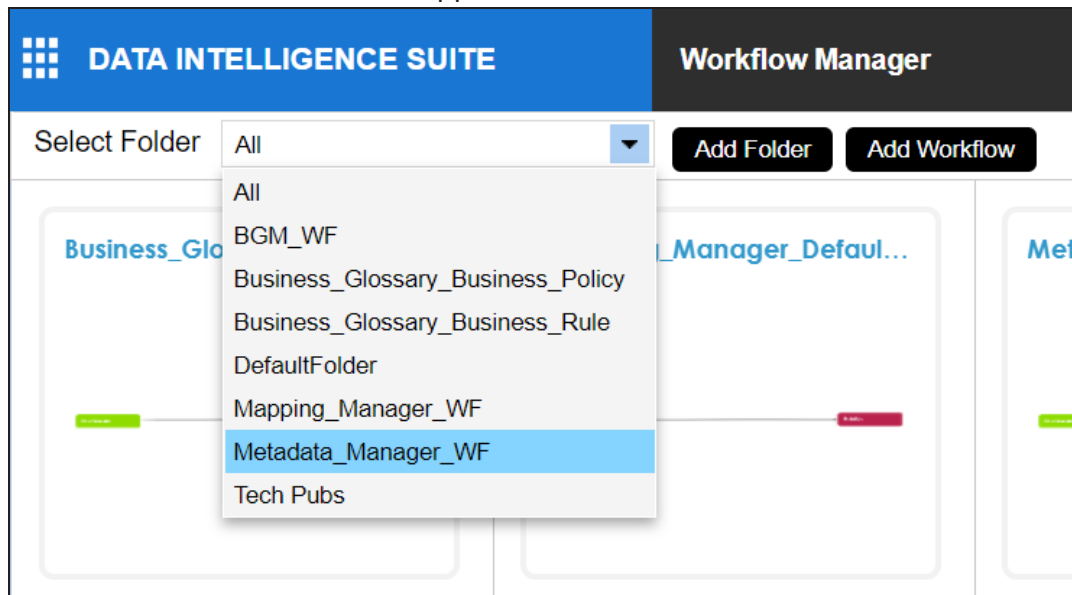
Before you assign workflows to tables:

- 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.

Assigning Workflows to Tables

Assign Workflow (Environment_WF → Environment)							New Assignment	Close
#	Name	Created By	Created Date	Modified By	Modified Date	Options		
1	SQL System	Administrator	11/17/2020 09:15:16				✎ ✕ 🔍	
2	erwin DM	Administrator	06/01/2021 12:06:57				✎ ✕ 🔍	

3. Click **New Assignment**.

The Assign To page appears.

Assign To

Save Cancel

Assign To*

Status title *

Draft

Roles

☒ Select All

☐ Administrator

☐ Data Owner_GER

☐ Data Owner_RO

☐ Data Owner_UK

☐ Data Steward_GER

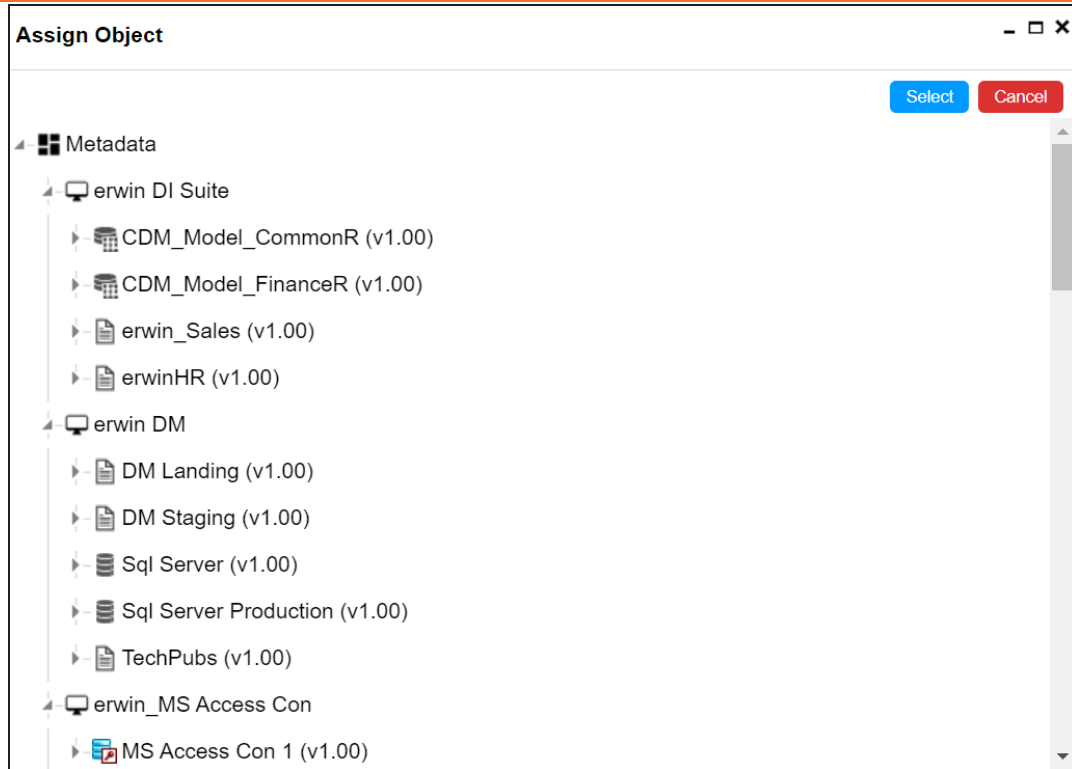
☐ Data Steward_Hung

Send Email ☐

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

The Assign Object page appears.

Assigning Workflows to Tables

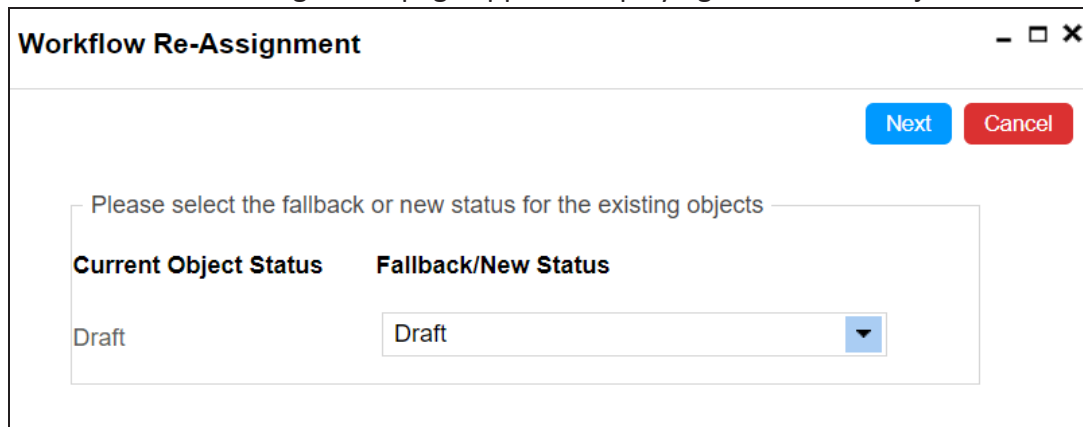


5. Click an Environment containing with required table.
6. Click **Select**.

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.



Assigning Workflows to Tables

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.

Assign To

Save

Cancel

Assign To*

DM Landing (v1.00)

...


Status title *


Draft


▼


Roles


⏻


☑️  Select All


☐ 


☒  Administrator

☐  Data Owner_GER

☐  Data Owner_RO

☐  Data Owner_UK

☐  Data Steward_GER

☐  Data Steward_Hung

Send Email

☐

Assigning Workflows to Tables

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.


[illegible]

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

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

Executing Workflows for Tables

My Workflow Queue								
Object Path :		Object Name :		Status Title :		Object Definition :		
Bulk Update : <input type="radio"/> Off		Workflow : <input type="text" value="Select"/>		Assigned Object :		Status Title :		Trigger On :
#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwin DM/DM Landing/Employees	Column	EmployeeName		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
2	erwin DM/DM Landing	Table	Employees		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
3	erwin DM/DM Landing	Table	Citizens		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
4	erwin DM/DM Landing/Employees	Column	EmployeeID		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
5	erwin DM/DM Landing/Citizens	Column	CitizenID		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16

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 : <input type="text" value="Employees"/>		Status Title :		Object Definition : <input type="text" value=""/>		
Bulk Update : <input type="radio"/> Off		Workflow : <input type="text" value="Select"/>		Assigned Object :		Status Title :		Trigger On : <input type="text" value=""/>
								<input type="button" value="Update Options"/>
#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwin DM/DM Landing	Table	Employees		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
2	SQL System/Northwind	Table	dbo.Employees		Draft	Object created and moved to draft	Administrator	02/26/2020 03:57:44
3	SQL System/TechPubs	Table	dbo.Employees		Draft	Object created and moved to draft	Administrator	04/05/2020 10:36:40
4	Oracle/TechPubs	Table	NORTHWIND.EMPLOYEES		Draft	Object created and moved to draft	Administrator	04/05/2020 13:08:04
5	SQLTechPubs/DM_Landing_158	Table	Employees		Draft	Object created and moved to Draft	Administrator	05/20/2020 14:04:00

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

The Table View page appears.

Executing Workflows for Tables

The screenshot shows the 'Table View' interface with two tabs: 'Properties' and 'Extended Properties'. The 'Properties' tab is active, displaying a form with the following fields:

Technical Properties	
Name	dbo.Categories
System Name	erwin DM
Synonym Reference	
Entity Type	TABLE
Workflow Status	Draft
Environment Name	Sql Server Production
No of Rows	
FileType	
XPath	

Business Properties	
Data Steward	
Definition	
Comments	
Sensitive Data Indicator (SDI) Flag	<input type="checkbox"/>
Sensitive Data Indicator (SDI) Classification	
Class	
DQ Score	
Logical Name	
Expanded Logical Name	
JSON Physical Name	
Used in Gap Analysis	<input checked="" type="checkbox"/>
Sensitive Data Indicator (SDI) Description	
Alias	

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' dialog box. It has a title bar with 'Workflow Change Description' and a close button. Below the title bar is a section labeled 'Comments*' with a text area containing the placeholder text 'Enter Change Description comments here'. At the bottom right of the dialog is an orange button labeled '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 logs of tables, refer to the [Viewing Workflow Logs of Tables](#) topic.

Executing Workflows for Tables

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.

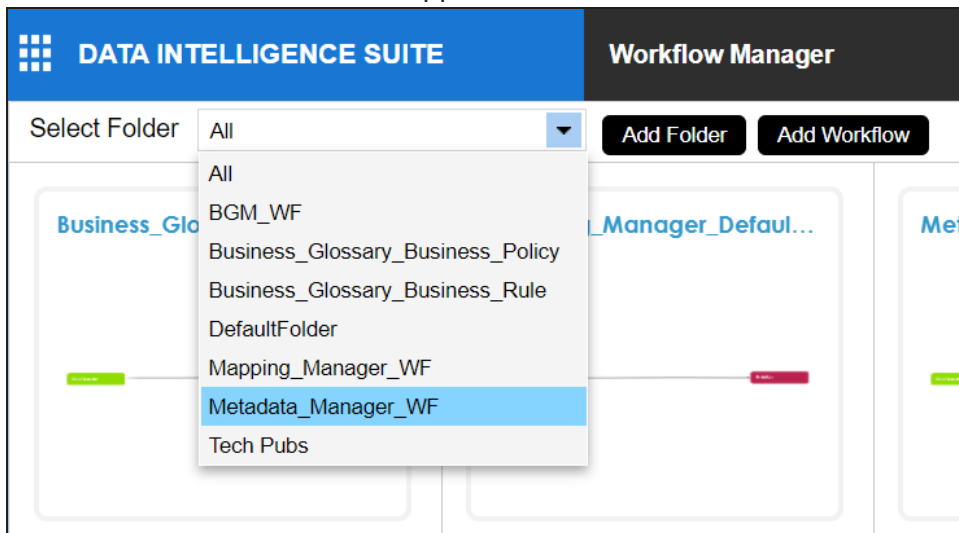
Before you assign workflows to columns:

- 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:

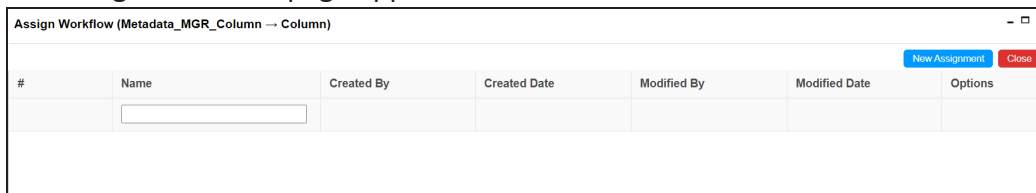
1. In the **Workflow Manager** page, select a folder.

All the workflows in the folder appear.



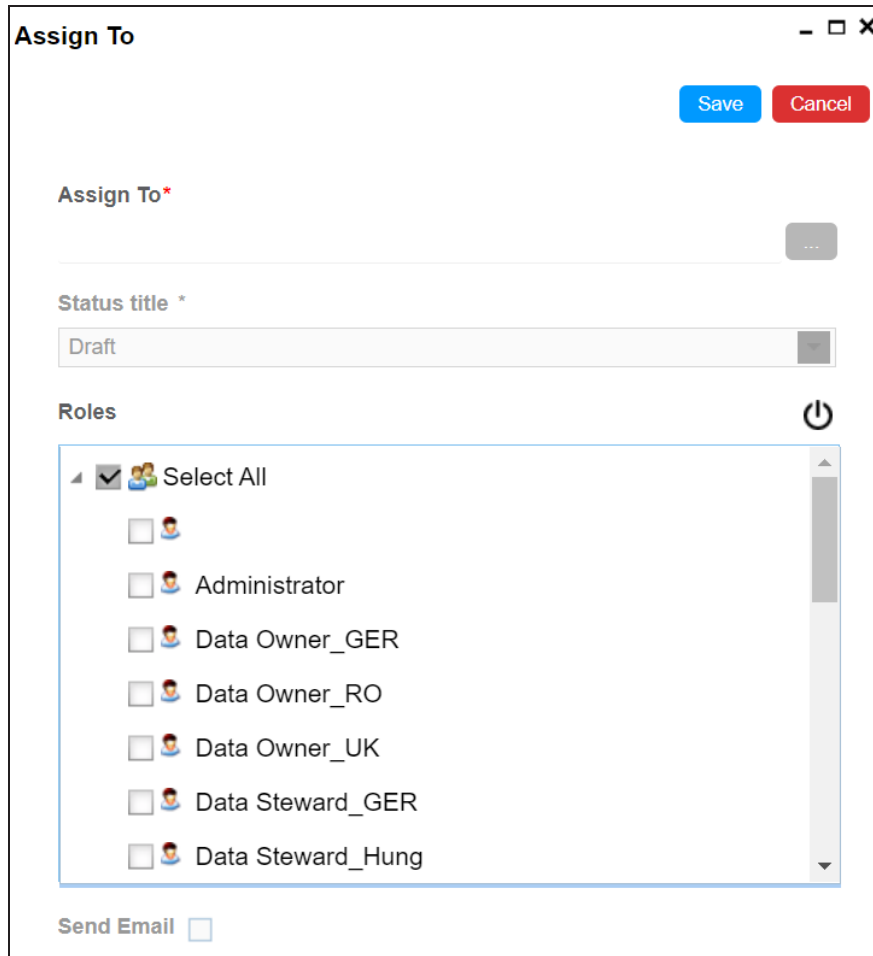
2. Hover over the required workflow and click .

The Assign Workflow page appears.



3. Click **New Assignment**.

The Assign To page appears.

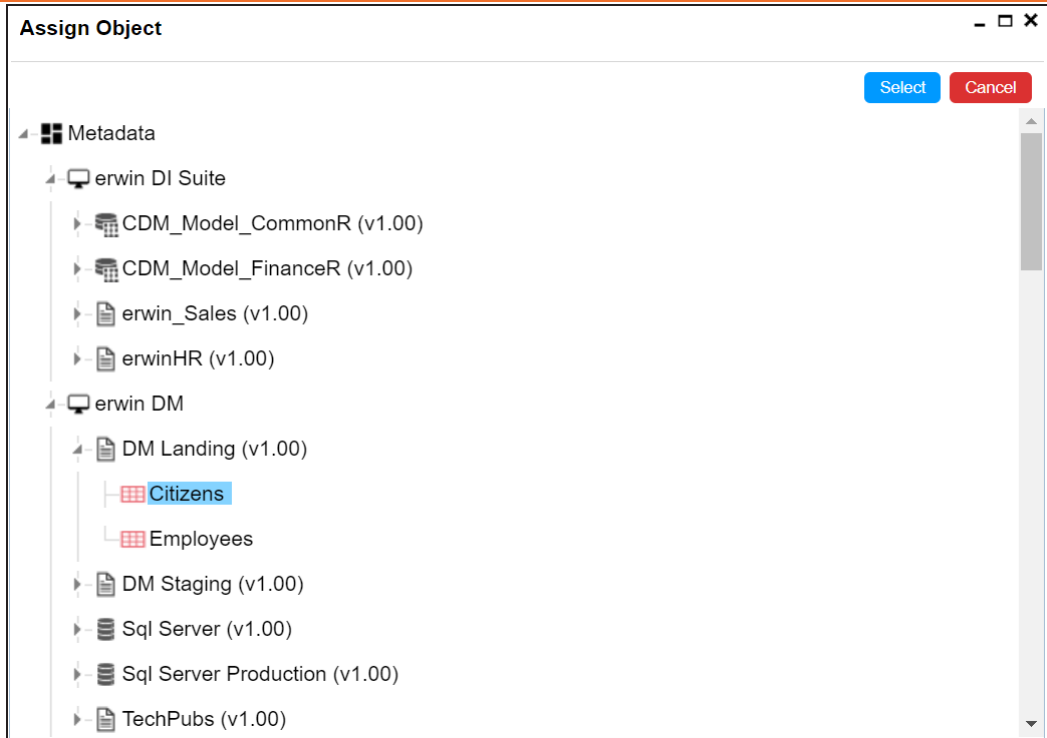


The screenshot shows a dialog box titled "Assign To" with standard window controls (minimize, maximize, close) in the top right corner. Below the title bar, there are two buttons: "Save" (blue) and "Cancel" (red). The main content area contains three sections: 1. "Assign To*" with a text input field and a small grey button with three dots to its right. 2. "Status title *" with a dropdown menu currently showing "Draft". 3. "Roles" with a power icon to its right. Below the "Roles" header is a scrollable list of roles, each preceded by a checkbox and a user icon. The roles are: "Select All" (checked), "Administrator", "Data Owner_GER", "Data Owner_RO", "Data Owner_UK", "Data Steward_GER", and "Data Steward_Hung". At the bottom of the dialog is a "Send Email" checkbox.

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

The Assign Object page appears.

Assigning Workflows to the Columns

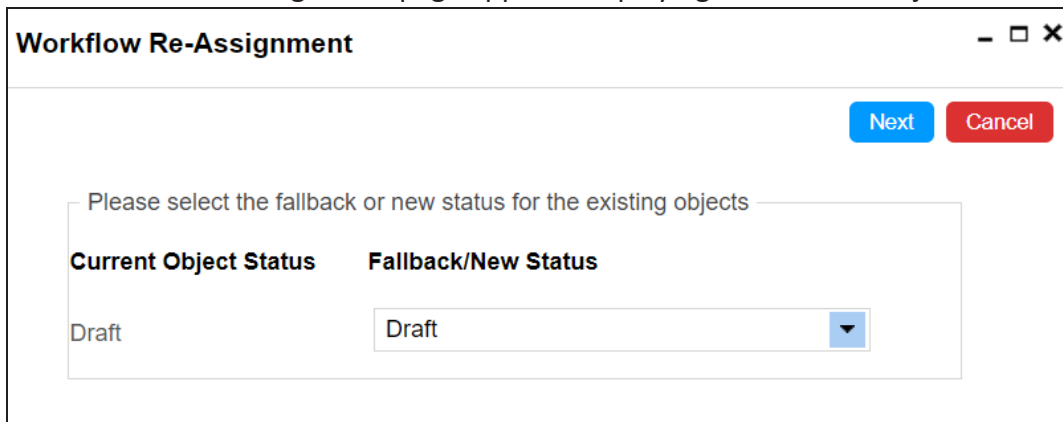


5. Select a table with necessary columns and click **Select**.

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.

Assigning Workflows to the Columns

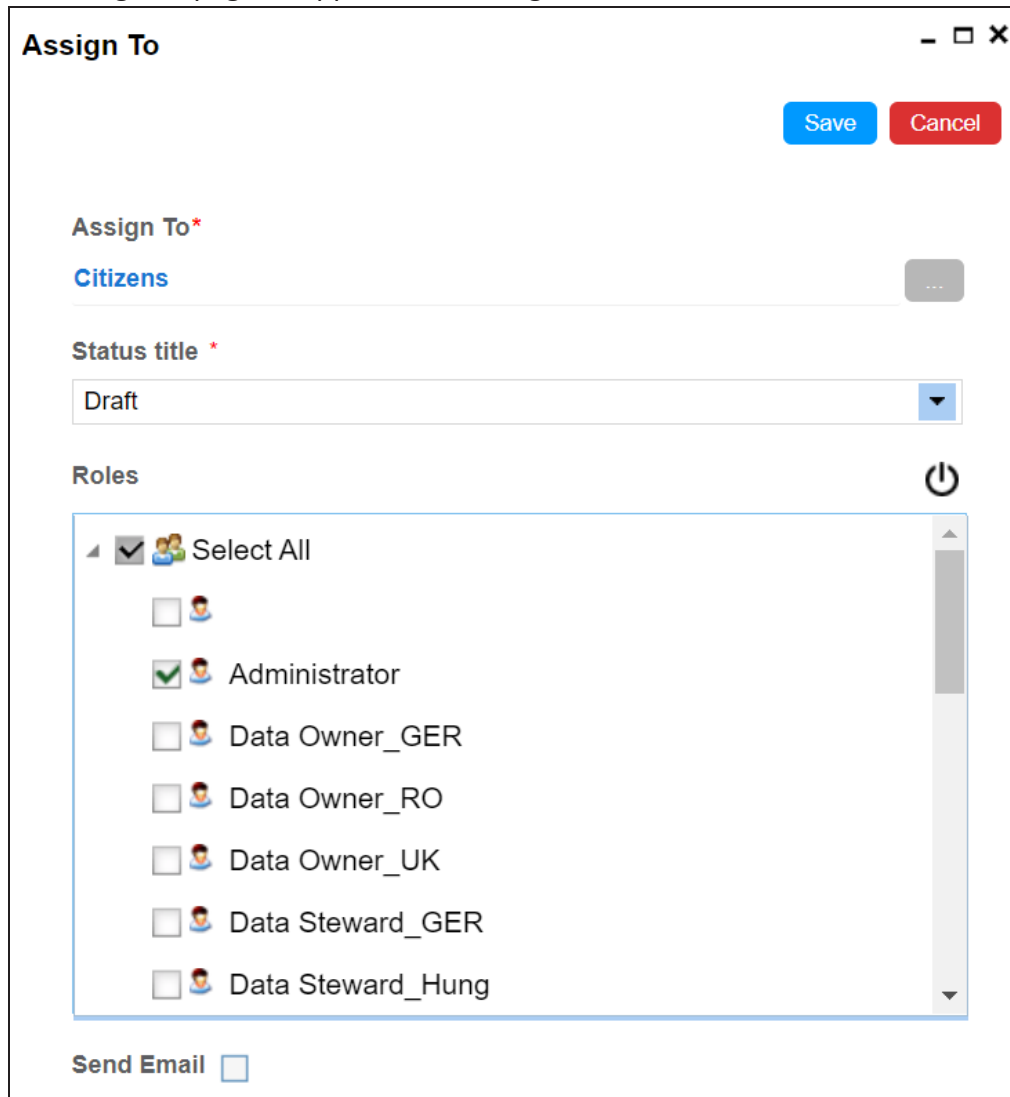
The options for Fallback/New Status depends on the [stages defined in the workflow](#).

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 image shows a dialog box titled "Assign To" with a close button (X) in the top right corner. Inside the dialog, there are two buttons: "Save" (blue) and "Cancel" (red). Below these buttons, the "Assign To*" field is populated with "Citizens" and has a dropdown arrow. The "Status title *" field is a dropdown menu currently showing "Draft". Below this is a section titled "Roles" with a power icon. It contains a list of roles with checkboxes: "Select All" (checked), "Administrator" (checked), "Data Owner_GER", "Data Owner_RO", "Data Owner_UK", "Data Steward_GER", and "Data Steward_Hung". At the bottom, there is a "Send Email" checkbox which is currently unchecked.

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

Assigning Workflows to the Columns

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.

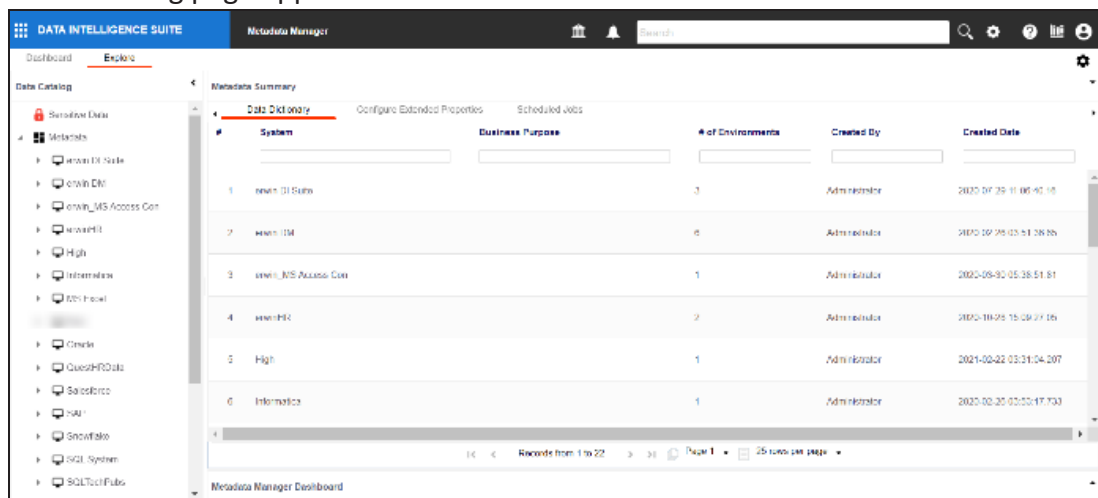
Executing workflows involves:

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 a 'Data Catalog' sidebar with a tree view containing items like 'Metadata', 'System', 'Business Purpose', 'High', 'Information', 'AWS Project', 'Oracle', 'QuestPRO Data', 'Salesforce', 'SAP', 'Snowflake', 'SQL System', and 'SQLTool Pubs'. The main area is titled 'Metadata Summary' and contains a table with columns: 'System', 'Business Purpose', '# of Environments', 'Created By', and 'Created Date'. The table lists six entries, all created by 'Administrator'. At the bottom, there is a pagination bar showing 'Records from 1 to 22', 'Page 1', and '25 rows per page'.


#	System	Business Purpose	# of Environments	Created By	Created Date
1	new-11 Euro		3	Administrator	2020-07-29 11:06:40.18
2	new-11M		6	Administrator	2020-09-29 03:51:38.55
3	new-11S Access Con		1	Administrator	2020-09-30 05:28:51.81
4	new-11P		2	Administrator	2020-10-26 15:29:27.06
5	High		1	Administrator	2021-02-22 03:21:04.207
6	Information		1	Administrator	2020-02-20 02:02:47.733

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

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

Executing Workflows for Columns

My Workflow Queue								
Object Path :		Object Name :		Status Title :		Object Definition :		
Bulk Update : <input type="radio"/> off		Workflow : <input type="text" value="Select"/>		Assigned Object :		Status Title :		Trigger On :
#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwin DM/DM Landing/Employees	Column	EmployeeName		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
2	erwin DM/DM Landing	Table	Employees		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
3	erwin DM/DM Landing	Table	Citizens		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
4	erwin DM/DM Landing/Employees	Column	EmployeeID		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
5	erwin DM/DM Landing/Citizens	Column	CitizenID		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16

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 : erwin DM/Sql Server Products

Object Name : category

Status Title :

Object Definition :



Bulk Update :

Y

Workflow :

Select

Assigned Object :

Status Title :

Trigger On :

Update Options

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
26	SQL System/Northwind/dbo Alphabetical list of products	Column	CategoryID		Draft	Object created and moved to draft	Administrator	02/26/2020 03:57:44
27	SQLTechPubs/SQLTechPubs	Table	dbo.Products by Category		Draft	Object created and moved to Draft	Administrator	06/24/2020 08:09:04
28	SQLTechPubs/SQLTechPubs	Table	dbo.Sales by Category		Draft	Object created and moved to Draft	Administrator	06/24/2020 08:09:04
29	SQL System/Northwind/dbo Alphabetical list of products	Column	CategoryName		Draft	Object created and moved to draft	Administrator	02/26/2020 03:57:44

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

The Column View page appears.

Executing Workflows for Columns

The screenshot shows the 'Column View' window with the 'Properties' tab selected. The 'Technical Properties' section contains the following fields:

Field	Value
Name	CitizenID
Data Domain	
Precision	
DB Default Value	
Nullable Flag	<input checked="" type="checkbox"/>
Natural Key Flag	<input type="checkbox"/>
Foreign Key Flag	<input type="checkbox"/>
Foreign Key Column Name	
Minimum Value	
File Starting Position	
Attribute Type	ENTITY_ELEMENT
Workflow Status	Draft

On the right side of the window, there is a 'Send To - Review' button.

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

The Workflow Change Description page appears.

The 'Workflow Change Description' dialog box is shown. It has a title bar with a close button. Below the title, there is a 'Comments*' section with a text area containing the placeholder text 'Enter Change Description comments here'. At the bottom right of the dialog, there 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 columns, refer to the [Viewing Workflow Logs of Columns](#) topic.

Executing Workflows for Columns

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.

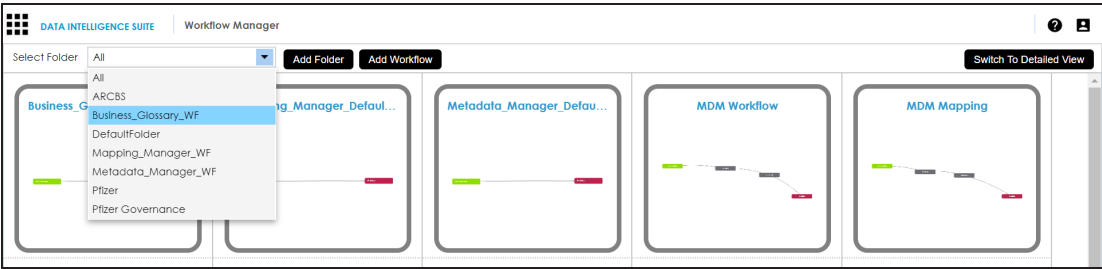
Before you assign workflows to business terms:

- 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:

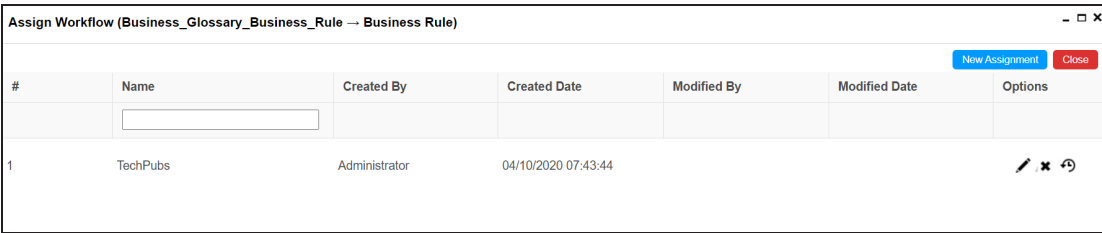
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.

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.

Assigning Workflows to Business Terms

The 'Assign To' dialog box is shown with a dark header bar containing the title 'Assign To' and window control buttons. In the top right corner, there are 'Save' and 'Cancel' buttons. The main area is divided into several sections: 'Assign To*' with a dropdown menu and a three-dot menu icon; 'Status title*' with a dropdown menu showing 'Preliminary Draft'; 'Roles' with a list of roles including 'Administrator', 'Data Owner_GER', 'Data Owner_RO', 'Data Owner_UK', 'Data Steward_GER', and 'Data Steward_Hung', each with a checkbox; and 'Governance Responsibility' with a list of roles including 'Data Stewards', 'Data Owners', 'Technical Data Steward', and 'Compliance Officer', each with a checkbox. At the bottom left, there is a 'Send Email' checkbox.

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

The Assign Object page appears.

The 'Assign Object' dialog box is shown with a dark header bar containing the title 'Assign Object' and window control buttons. In the top right corner, there are 'Select' and 'Cancel' buttons. The main area displays a tree view under the 'Business Terms' folder, which is expanded. The tree view shows several sub-folders with their respective item counts: 'Business and Management (54)', 'Catalog_Name (2)', 'Customers Business (666)', 'NASDAQ HEALTHCARE - IMP 1 (19)', 'NASDAQ HEALTHCARE - IMP 2 (19)', 'New_Catalog (1)', and 'NSDQ OPT 3 (2)'.

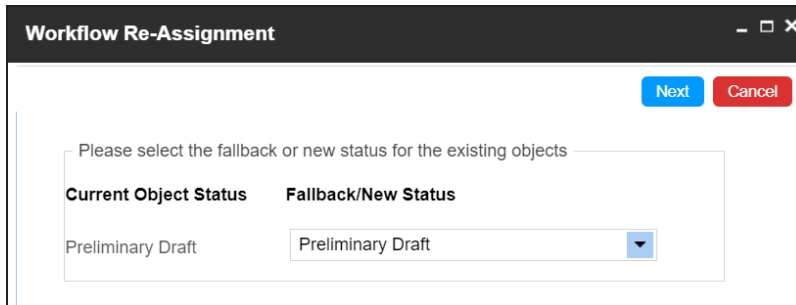
6. Select a catalog and click **Select**.

A warning message appears.

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

Assigning Workflows to Business Terms

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

Current Object Status	Fallback/New Status
Preliminary Draft	Preliminary Draft

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.

Assigning Workflows to Business Terms

Assign To

Assign To*
Customer Terms

Status title*
Preliminary Draft

Roles

- ☒ Select All
- ☐ Administrator
- ☒ Data Owner_GER
- ☒ Data Owner_RO
- ☐ Data Owner_UK
- ☐ Data Steward_GER
- ☐ Data Steward_Hung

Governance Responsibility

- ☐ Select All
- ☐ Data Stewards
- ☐ Data Owners
- ☐ Technical Data Steward
- ☐ Compliance Officer

Send Email ☐

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.

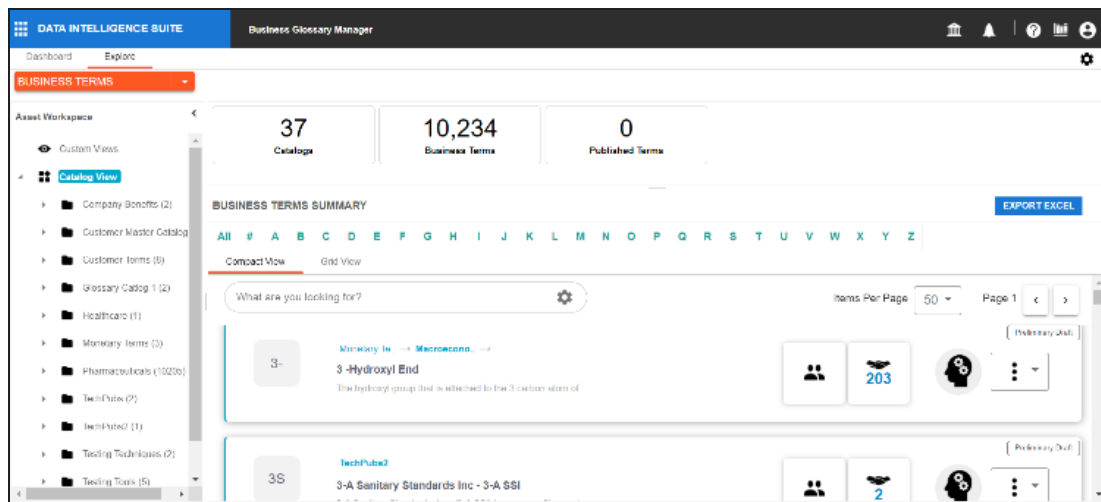
Executing workflows involves:

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

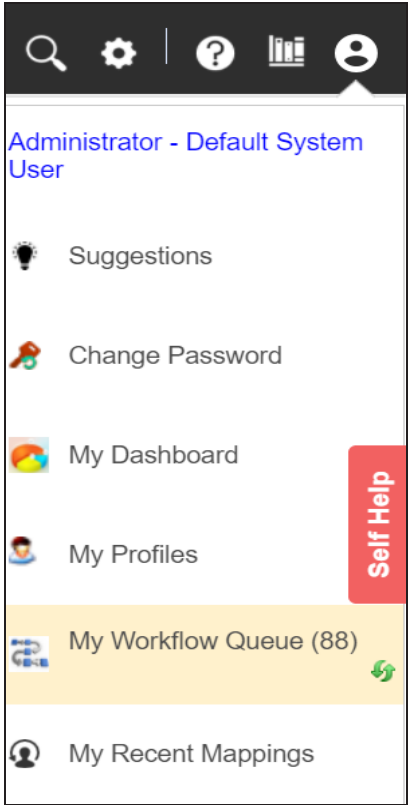
To execute workflows for the business terms, follow these steps:

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

The following page appears.



2. Click .




3. Click **My Workflow Queue**.

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

My Workflow Queue						
Object Path :		Object Name :		Status Title :		Object Description :
Bulk Update : <input type="checkbox"/> OFF		Workflow : <input type="text" value="Select"/>		Assigned Object : <input type="text" value=""/>		Status Title : <input type="text" value=""/>
				Trigger On : <input type="text" value=""/>		<input type="button" value="Update Options"/>
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	Glossary Catlog 1/Metadadata Management/Metadadata Manager	Business Term	Beta Testing	A beta test is the second phase of software testing in which a sampling of the intended audience tries the product out. (Beta is the second letter of the Greek alphabet.) Originally, the term alpha testing meant 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.	Draft	Object created and moved to Draft

Executing Workflows for Business Terms


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.

My Workflow Queue						
Object Path :		Object Name :	customer	Status Title :		Object Description :
Bulk Update :		Workflow :	Select	Assigned Object :		Trigger On :
				Status Title :		Update Options
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	Customer Master Catalog	Business Term	CUSTOMER	a person who buys your product	Pending Review	Sending for review.
2	TechPubs	Business Term	Customer Address	place where a customer resides	Draft	Object created and moved to Draft
3	TechPubs	Business Term	Customer Email	Email Address for the customer	Draft	Object created and moved to Draft
4	Customer Terms	Business Term	Customer First Name	First Name of the Customer	Draft	Object created and moved to draft
5	Customer Terms	Business Term	Customer Last Name	Last Name of the Customer	Draft	Object created and moved to draft
6	Customer Terms	Business Term	Customer Phone Number	Phone Number for the Customer	Draft	Object created and moved to draft

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

The <Business_Term> page appears.

**CUSTOMER**
Customer Master Catalog

[View Business Term](#) | [Additional Information](#) | [Associations](#) | [Rich Media Library](#) | [Collaboration Center](#) | [Workflow Log](#) | [History](#) | [Valid Values](#)

Term Details

Business Term
CUSTOMER

Definition
a person who buys your product

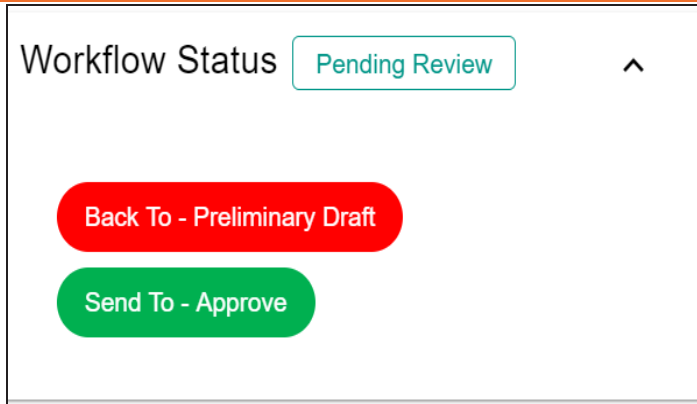
Workflow Status Pending Review

Governance Responsibilities

Data Stewards
Mike Mannigan Mike Menza

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

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



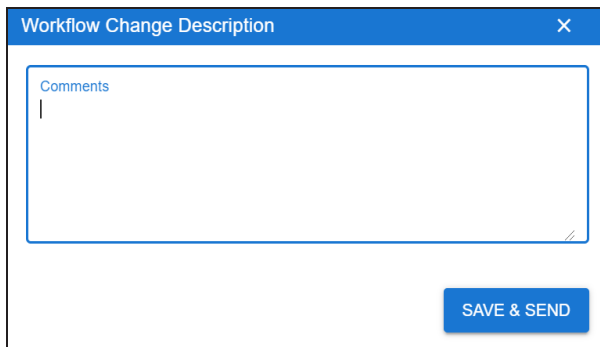
Workflow Status Pending Review ^

Back To - Preliminary Draft

Send To - Approve

The dialog box shows the current workflow status as 'Pending Review'. It contains two buttons: 'Back To - Preliminary Draft' (red) and 'Send To - Approve' (green).

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



Workflow Change Description X

Comments

|

SAVE & SEND

The dialog box has a title bar 'Workflow Change Description' with a close button 'X'. It contains a text area labeled 'Comments' with a cursor. At the bottom right is a 'SAVE & SEND' button.

- Enter comments.
- 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.

Executing Workflows for Business Terms

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.

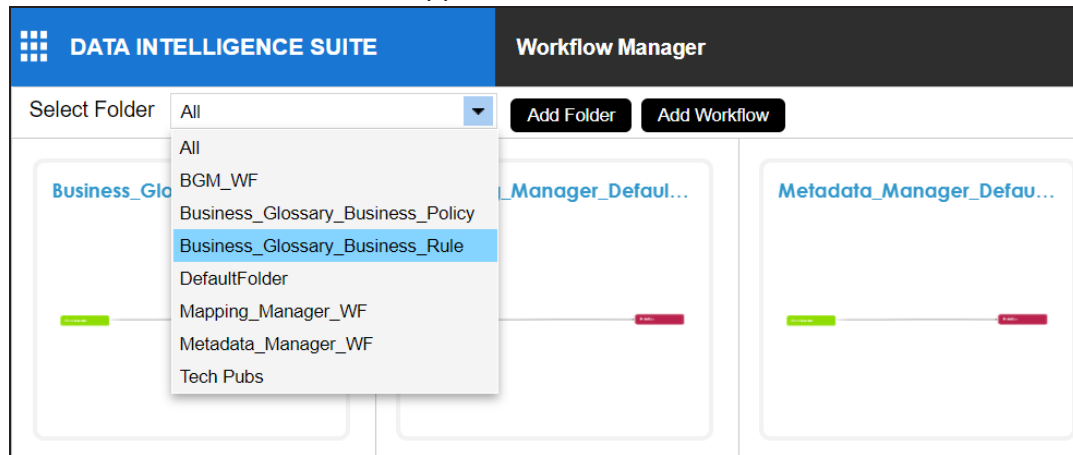
Before you assign workflows to business rules:

- 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. 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.

Assigning Workflows to Business Rules

Assign Workflow (Business_Glossary_Business_Rule → Business Rule)							New Assignment	Close
#	Name	Created By	Created Date	Modified By	Modified Date	Options		
1	TechPubs	Administrator	04/10/2020 07:43:44			  		

4. Click **New Assignment**.

The Assign To page appears.

Assign To

[Save](#) [Cancel](#)

Assign To *

Status title *

Draft

Roles

☒ Select All

☐ Administrator

☒ Administrator

☐ Data Owner_GER

☐ Data Owner_RO

☐ Data Owner_UK

☐ Data Steward_GER

☐ Data Steward_Hung

Send Email ☐

Governance Responsibility

☐ Select All

☐ Data Stewards

☐ Data Owners

☐ Technical Data Steward

☐ Compliance Officer

☐ Daya Owner_IN

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

The Assign Object page appears.

Assign Object

[Select](#) [Cancel](#)

☒ Business Rules

☐ Customer Rules (15)

☐ Erwin_Sales (2)

☐ TechPubs (4)

Assigning Workflows to Business Rules

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

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

The screenshot shows the 'Assign To' dialog box. At the top right are 'Save' and 'Cancel' buttons. The 'Assign To' field is set to 'Customer Rules'. Below it, the 'Status title' dropdown is set to 'Draft'. There are two main sections: 'Roles' and 'Governance Responsibility'. The 'Roles' section has a 'Select All' button and a list of roles: 'Administrator' (checked), 'Data Owner_GER', 'Data Owner_RO', 'Data Owner_UK', 'Data Steward_GER', and 'Data Steward_Hung'. The 'Governance Responsibility' section also has a 'Select All' button and a list of roles: 'Data Stewards', 'Data Owners', 'Technical Data Steward', 'Compliance Officer', and 'Data Owner_IN'. At the bottom left is a 'Send Email' checkbox.

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.

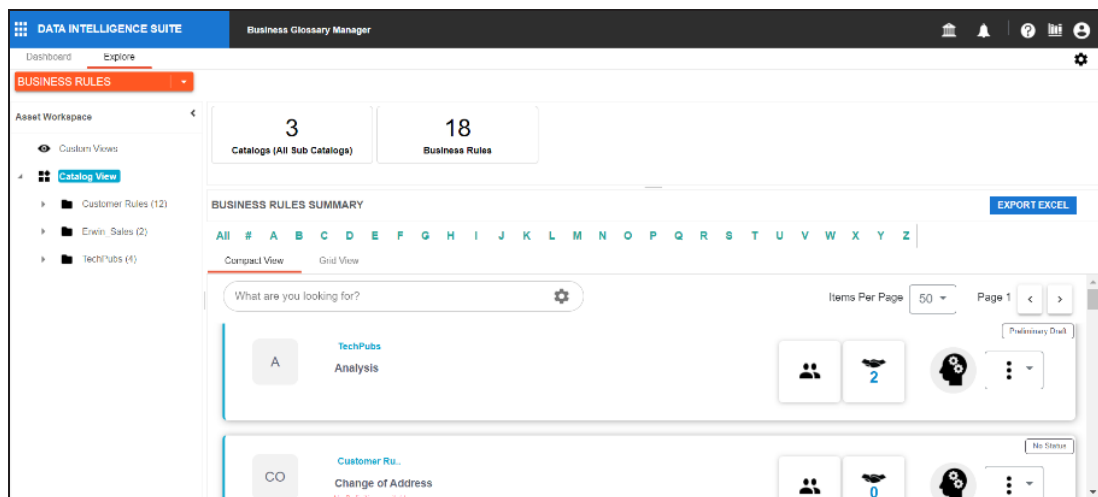
Executing workflows involves:

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.

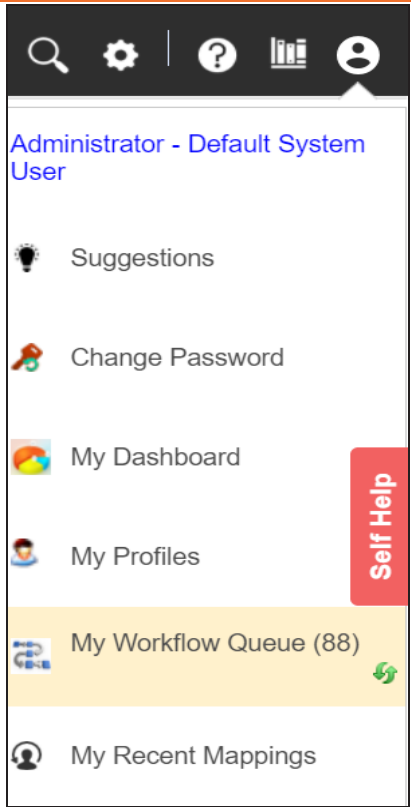
To execute workflows for business rules, follow these steps:

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




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 : Analysis		Status Title :		Object Description :
Bulk Update :		Workflow :	Assigned Object :	Status Title :	Trigger On :	Update Options :
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	TechPubs	Business Rule	Analysis		Draft	Object created and moved to draft
2	Pharmaceuticals/International Society for Pharmaceutical Engineering - ISPE	Business Term	Algorithm Analysis	LEN(D322)	Draft	Object created and moved to Draft
3	Pharmaceuticals/International Society for Pharmaceutical Engineering - ISPE	Business Term	Amino Acid Analysis	LEN(D368)	Draft	Object created and moved to Draft

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

The <Business_Rule> page appears.

Executing Workflows for Business Rules

The screenshot shows the 'Respect time' business rule configuration page. The page has a header with the rule name 'Respect time' and a close button. Below the header is a navigation bar with tabs: 'View Business Rule' (selected), 'Associations', 'Rich Media Library', 'WorkFlow Log', and 'History'. The main content area is divided into two columns. The left column contains 'Rule Details' with a 'Business Rule' field (value: 'Respect time') and a 'Definition' field (value: '"Make an appointment when it is convenient for your client," Solomon says. "Everyone's time is valuable. Feel thankful that they will see you at all."'). The right column contains 'Workflow Status' (value: 'Preliminary Draft'), 'Governance Responsibilities' (value: 'No Assignments Found'), and 'Classification' (value: 'Sensitive Data Indicator(SDI)').

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

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

The screenshot shows the 'Workflow Status' dropdown menu. The menu is open, showing the current status 'Preliminary Draft' and a green button labeled 'Send To - Review'.

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' dialog box. The dialog has a title bar with the text 'Workflow Change Description' and a close button. The main content area contains a text input field labeled 'Comments' with a cursor. At the bottom right of the dialog is a blue button labeled 'SAVE & SEND'.

Executing Workflows for Business Rules

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.

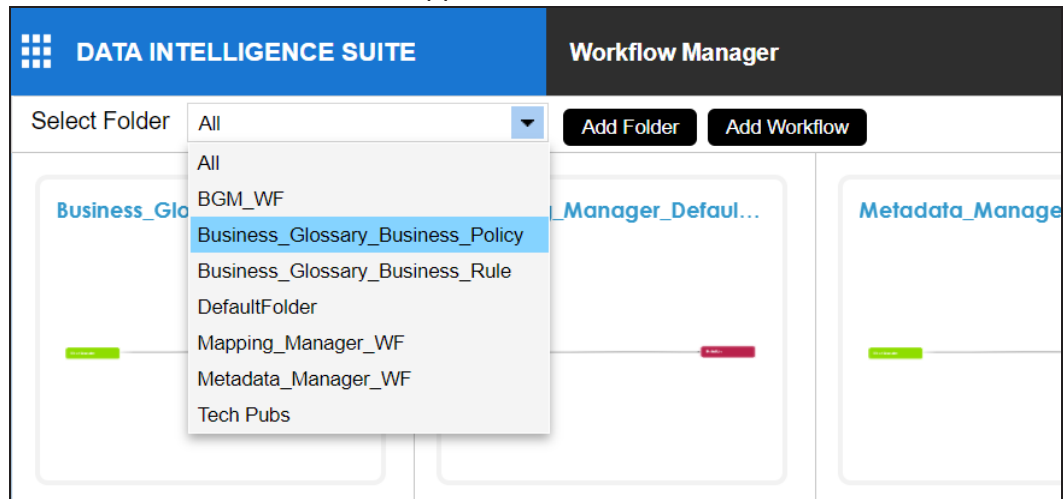
Before you assign workflows to business policies:

- 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. 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.

Assigning Workflows to Business Policies

Assign Workflow (Business_Glossary_Business_Policy → Business Policy)							
#	Name	Created By	Created Date	Modified By	Modified Date	Options	
1	TechPubs	Administrator	04/10/2020 07:06:50				  

4. Click **New Assignment**.

The Assign To page appears.

Assign To

Save

Cancel

Assign To*

Status title *

Draft

Roles

Select All

☐

Administrator

☒

Data Owner_GER

☐

Data Owner_RO

☐

Data Owner_UK

☐

Data Steward_GER

☐

Data Steward_Hung

Governance Responsibility

Select All

☐

Data Stewards

☐

Data Owners

☐

Technical Data Steward

☐

Compliance Officer

☐

Daya Owner_IN

Send Email

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

The Assign Object page appears.

Assign Object

Select

Cancel

Business Policies

Erwin_Employee (2)

GDPR Policies (5)

TechPubs (2)

Assigning Workflows to Business Policies

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

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

The screenshot shows the 'Assign To' dialog box. At the top right are 'Save' and 'Cancel' buttons. The 'Assign To*' field contains 'Erwin_Employee'. Below it, the 'Status title*' dropdown is set to 'Draft'. There are two main sections: 'Roles' and 'Governance Responsibility'. The 'Roles' section has a 'Select All' button and a list of roles with checkboxes: Administrator (checked), Data Owner_GER, Data Owner_RO, Data Owner_UK, Data Steward_GER, and Data Steward_Hung. The 'Governance Responsibility' section also has a 'Select All' button and a list of roles with checkboxes: Data Stewards, Data Owners, Technical Data Steward, Compliance Officer, and Daya Owner_IN. At the bottom left is a 'Send Email' checkbox.

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.

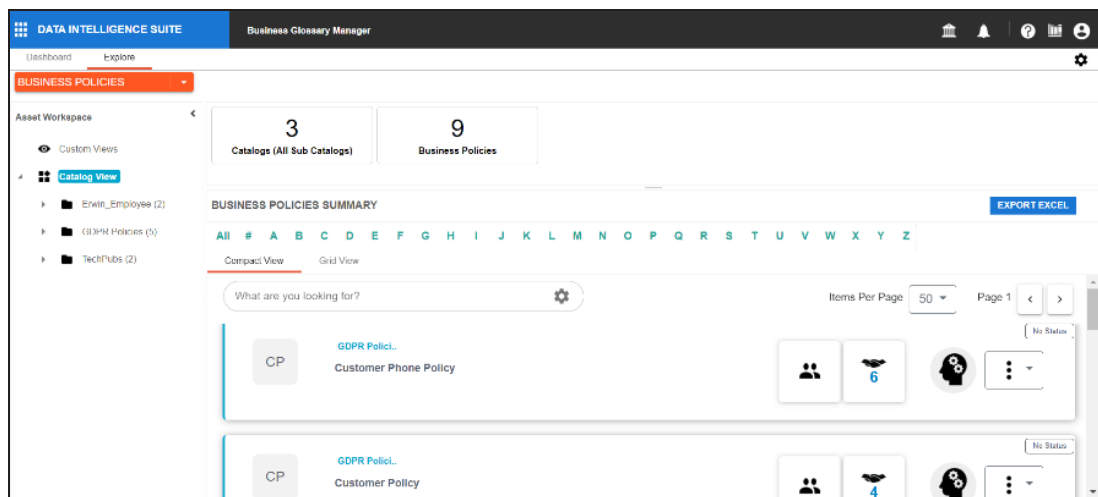
Once the workflow is assigned to the business policy, it can be executed via the Workflow Queue.

Executing workflows involves:

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

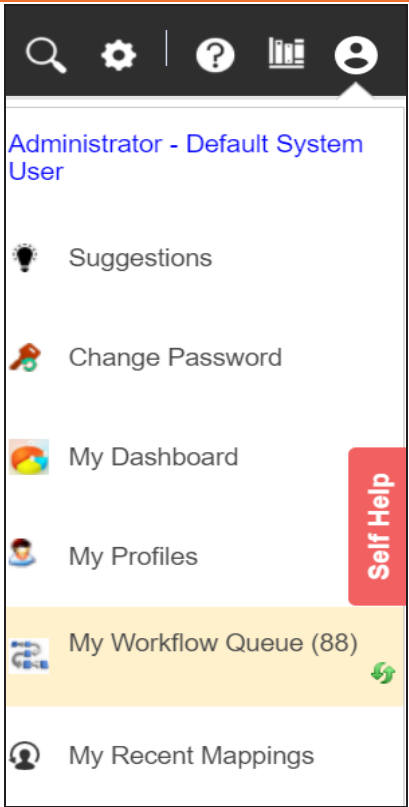
To execute workflows for business policies, follow these steps:

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




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 :		WorkFlow :	Select	Assigned Object :		Trigger On :
				Status Title :		Update Options
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	Erwin_Employee	Business Policy	Performance Review Policies		Draft	Object created and moved to Draft

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

Executing Workflows for Business Policies

The <Business_Policy> page appears.

The screenshot shows a web application window titled "Performance Review Policies" with a close button (X) in the top right corner. Below the title bar, the user "Erwin_Employee" is logged in. A navigation bar contains several tabs: "View Business Policy" (which is underlined), "Additional Information", "Associations", "Rich Media Library", "Collaboration Center", "Workflow Log", and "History". To the right of the tabs are three icons: a pencil, a person, and a trash can. The main content area is divided into two columns. The left column, titled "Policy Details", contains a dashed box with the text "Business Policy" and "Performance Review Policies". The right column contains a "Workflow Status" section with a dropdown menu showing "Preliminary Draft" and a downward arrow. Below this is a "Governance Responsibilities" section with the text "No Assignments Found" in red.

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

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

The screenshot shows a close-up of the "Workflow Status" dropdown menu. The menu is open, showing the current status "Preliminary Draft" and an upward arrow. Below the status, there is a large green button labeled "Send To - Review".

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 dialog box titled "Workflow Change Description" with a close button (X) in the top right corner. Inside the dialog, there is a large text area labeled "Comments" with a vertical cursor. At the bottom right of the dialog, there is a blue button labeled "SAVE & SEND".

Executing Workflows for Business Policies

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](#).