



**erwin Data Intelligence**

**Workflow Management Guide**

**Release v13.2**

## 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 © 2023 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](mailto:distechpubs@erwin.com).

## News and Events

Visit [News and Events](#) 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

---

<b>Managing Workflows</b> .....	<b>7</b>
Using Workflow Manager .....	8
Adding Folders .....	10
Edit Folders .....	11
Delete Folders .....	11
Adding Workflows .....	13
Edit Workflows .....	15
Delete Workflows .....	16
Configuring Workflows .....	17
Creating Stages .....	17
Adding Stages to Workflows .....	19
Deleting Stages .....	21
Managing Stages .....	23
Managing Mapping Manager Workflows .....	27
Assigning Workflows to Projects .....	28
Executing Workflows .....	33
Managing Metadata Manager Workflows .....	37
Assigning Workflows to Environments .....	38
Executing Workflows for Environments .....	42
Assigning Workflows to Tables .....	46
Executing Workflows for Tables .....	50
Assigning Workflows to the Columns .....	54

---

Executing Workflows for Columns .....	58
Managing Business Glossary Manager Workflows .....	62
Assigning Workflows to Business Terms .....	63
Executing Workflows for Business Terms .....	67
Assigning Workflows to Business Rules .....	73
Executing Workflows for Business Rules .....	77
Assigning Workflows to Business Policies .....	81
Executing Workflows for Business Policies .....	85
Managing Data Marketplace Workflows .....	89
Assigning Workflows to Datasets .....	90
Executing Workflows for Datasets .....	93

---

## Managing Workflows

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

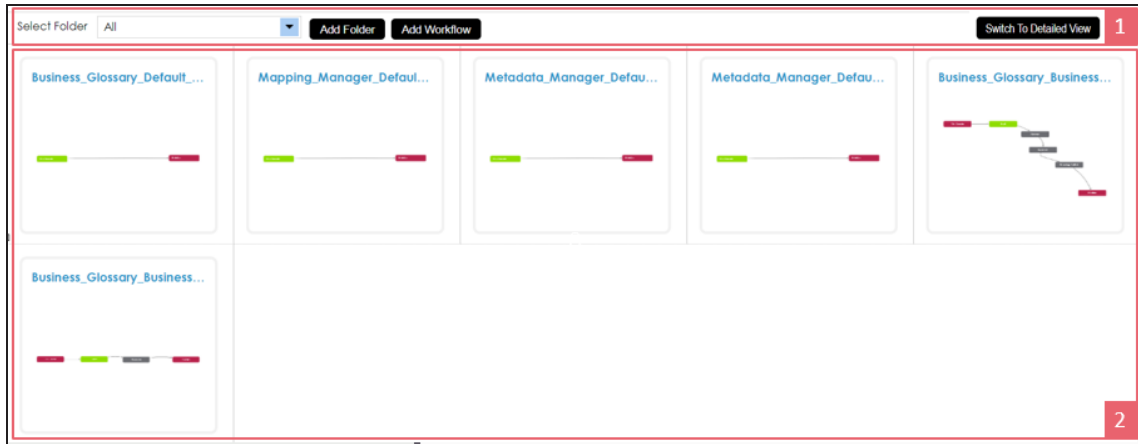
Also, you can create a collection of workflows and assign those workflows to any module based on the requirement.

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"><li>▪ Select folders</li><li>▪ Add folders</li><li>▪ Add workflows</li><li>▪ Switch between tile view and detailed view</li></ul>
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](#)
- [Managing data marketplace 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.



The screenshot shows a window titled "Add Folder" with a close button in the top right corner. Below the title bar, there are two buttons: "Save" (blue) and "Cancel" (red). The form contains two main sections: "Name" and "Description". The "Name" section has a text input field with a red asterisk next to the label. The "Description" section has a rich text editor with a toolbar containing icons for bold, italic, underline, list, and other text formatting options.

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:

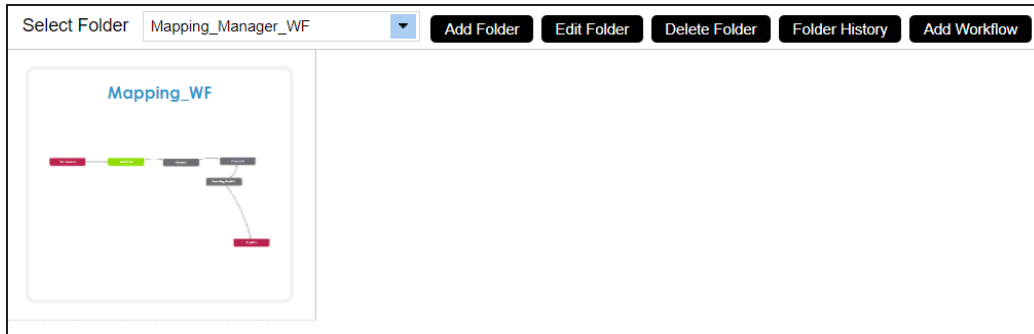
- [Add workflows](#)
- [Edit folders](#)
- [Delete folders](#)

### 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:

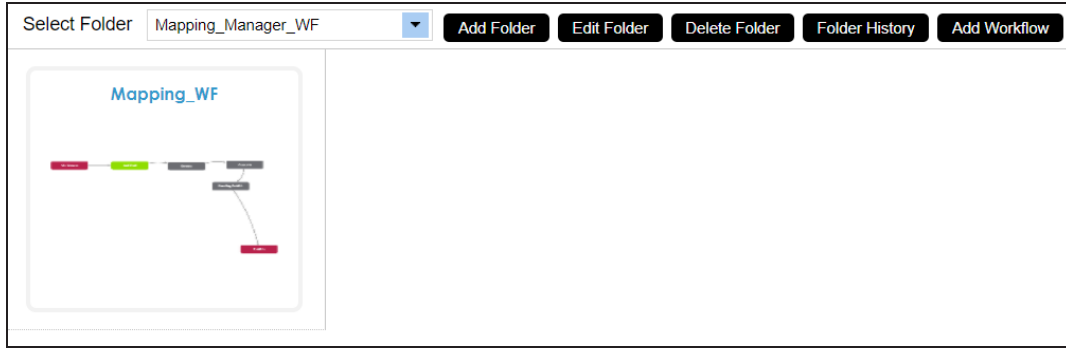
1. In the utility pane, select a folder.
2. Click **Delete Folder**.

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

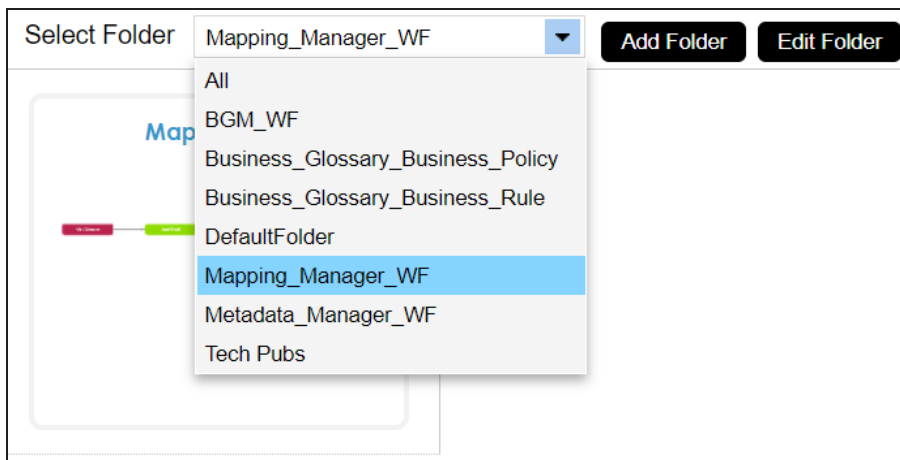
You can create workflows and add them to a folder.

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

- Business Glossary Manager
- Metadata Manager
- Mapping Manager
- Data Marketplace

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

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, Mapping Manager, and Data Marketplace.
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.

## Adding Workflows

Field Name	Description
	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.

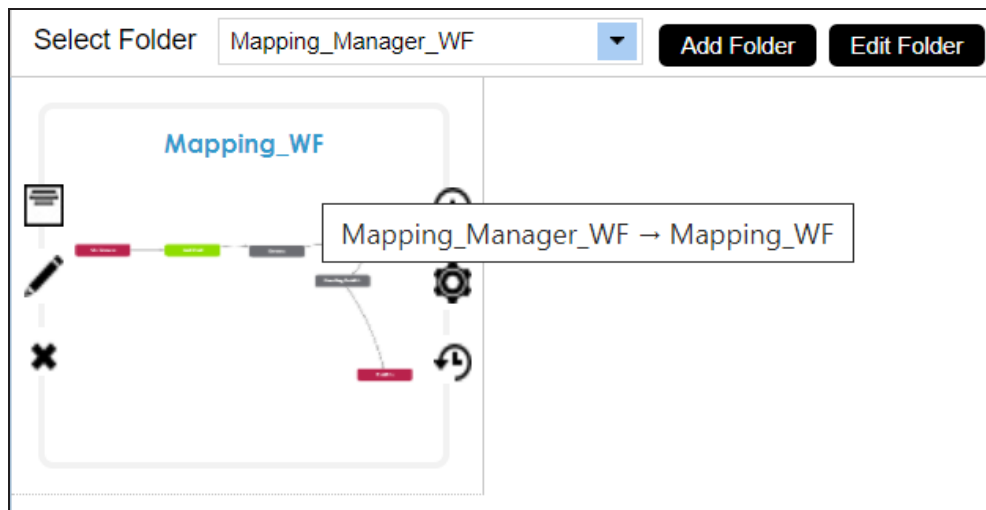
Once a workflow is added, you can:

- [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.



## Adding Workflows

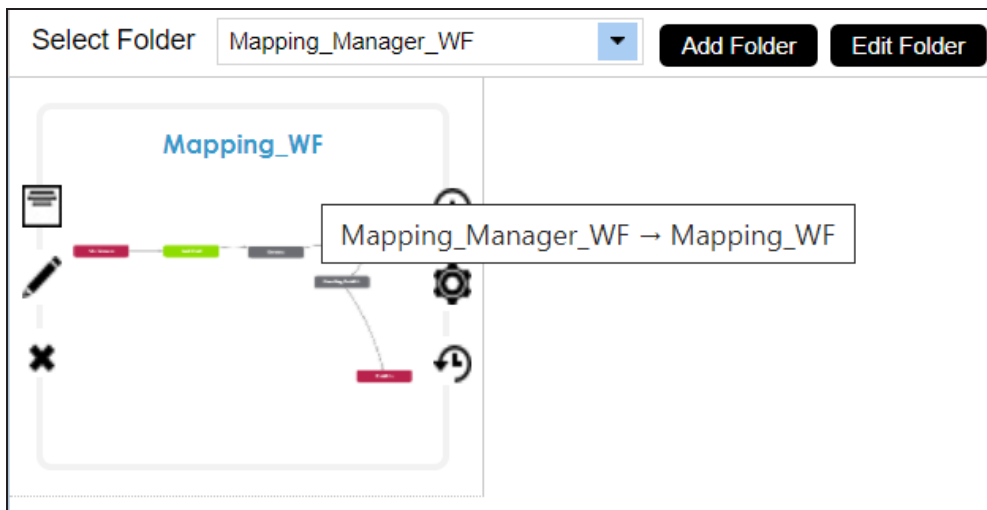
---


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.



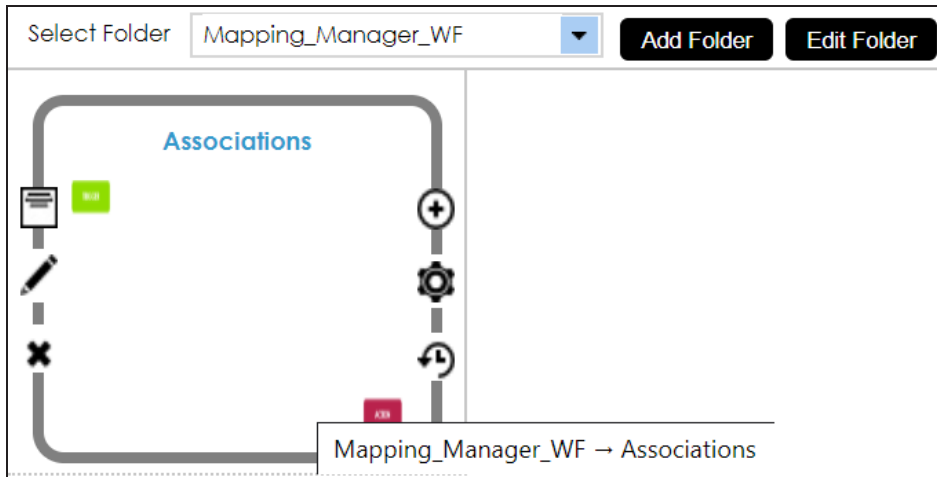
## Configuring Workflows

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:

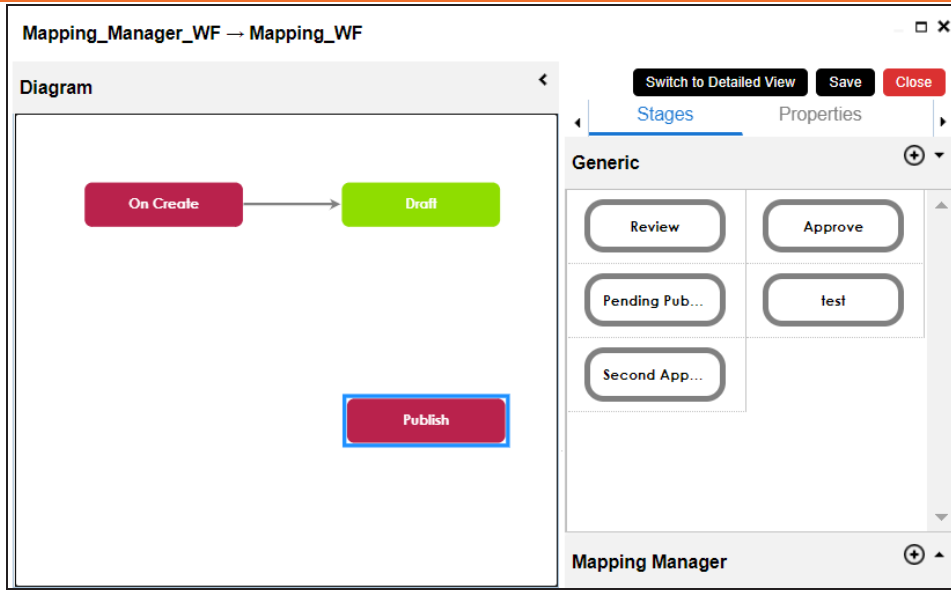
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.  
The workflow pane displays a list of workflows.
3. Hover over a workflow.




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.

## Configuring Workflows



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

The Add Stage page appears.

The 'Add Stage' form is shown with three required fields: 'Name', 'Status title', and 'Description'. The 'Name' field has a placeholder 'Stage Name is a required field'. The 'Status title' field has a placeholder 'Status title is a required field'. The 'Description' field has a rich text editor toolbar. The 'Next' and 'Cancel' buttons are visible in the top right corner.

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**.

## Configuring Workflows

The Add Stage page appears.

**Add Stage**

Previous Save Cancel

**Select Roles :**

- Select All
- Administrator
- Data Owner\_GER
- Data Owner\_RO
- Data Owner\_UK
- Data Steward\_GER
- Data Steward\_Hung
- Data Steward\_RO
- Data Steward\_UK
- ETL Developer
- Mapping\_Tester
- Mapping Admin
- Mapping Designer
- Old\_DataSteward

**Select Governance Responsibilities:**

- Select All
- Data Stewards
- Technical Data Steward
- Compliance Officer
- Data Owners
- Daya Owner\_IN



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**.

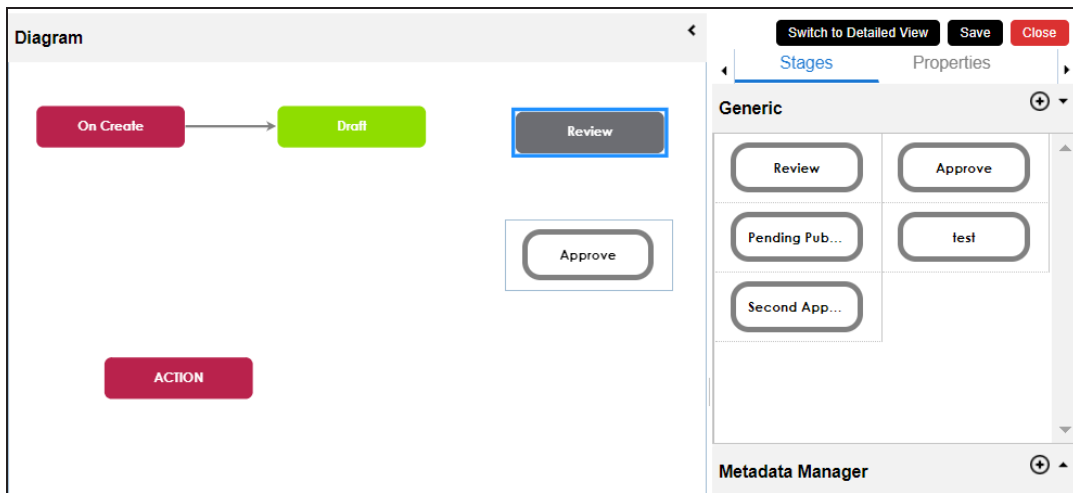
The generic stage is created. You can create as many generic stages you want and assign roles to each stage.

## Adding Stages to Workflows

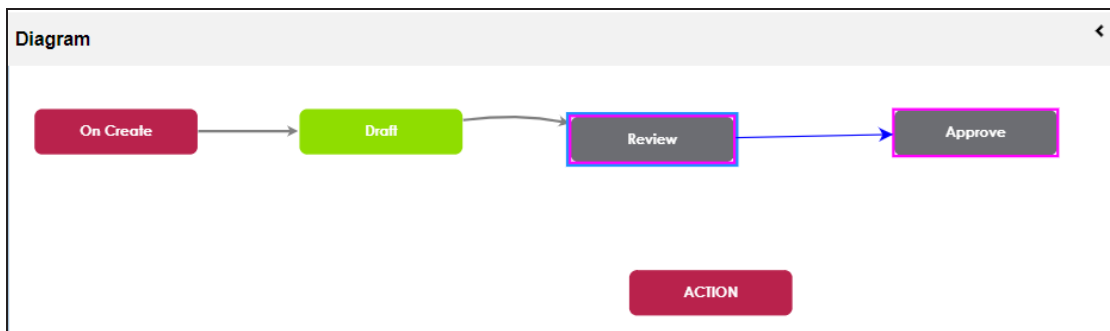
To add generic stages to workflows, follow these steps:

## Configuring Workflows

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

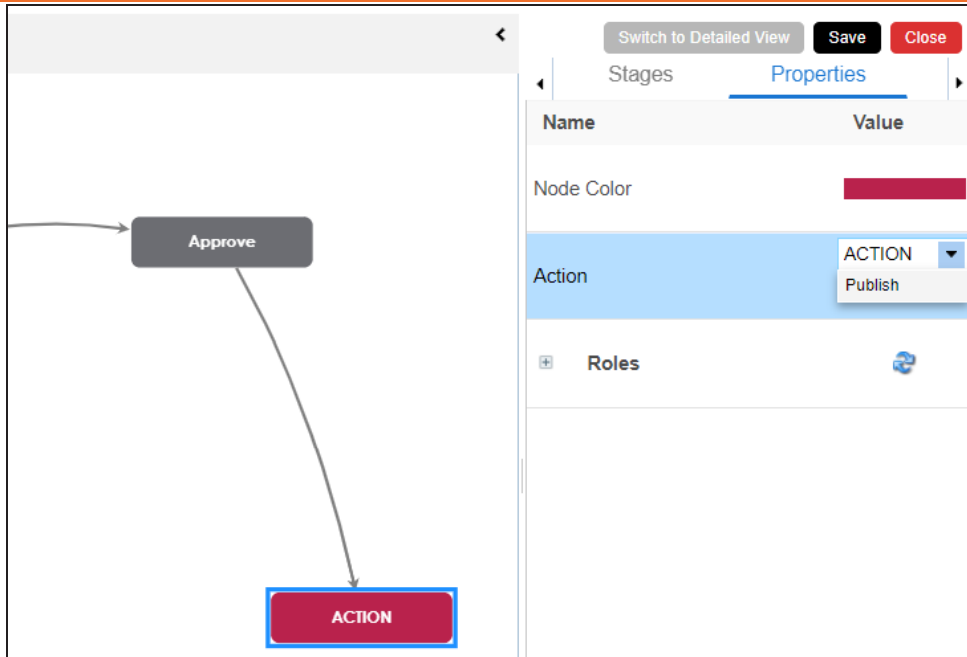


2. Drag the cursor from one stage to the next stage to connect the two stages.



3. In the **Diagram** pane, select the **Action** block stage, and then click the **Properties** tab.
4. Double-click the cell under the **Value** column against **Action** and select **Publish**.

## Configuring Workflows



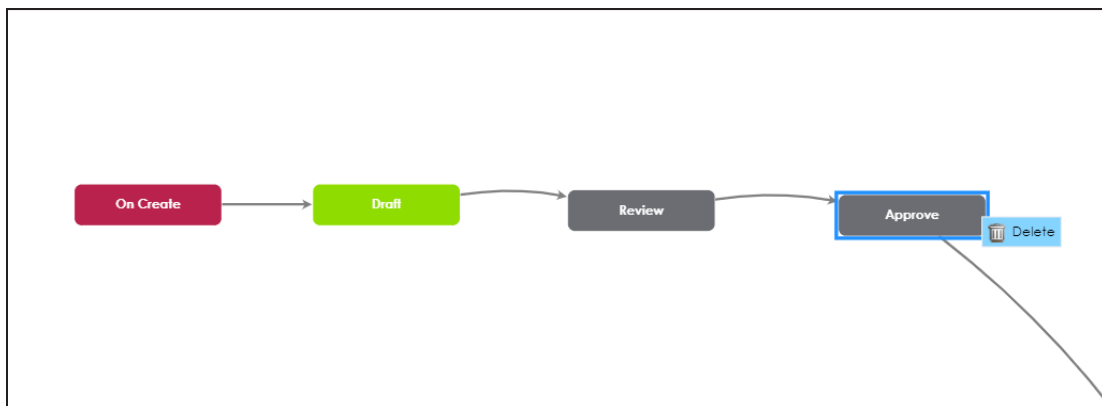
5. Expand the **Roles** node and select appropriate roles.
6. Click **Save**.

The workflow is configured and saved.

## Deleting Stages

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

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



## Configuring Workflows

---

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.

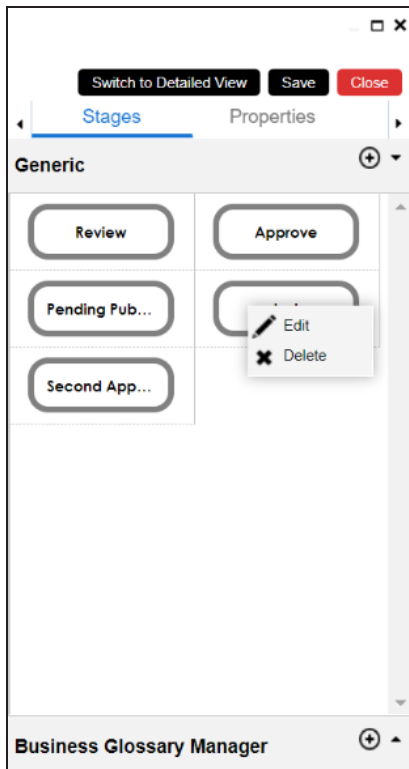
# Managing Stages

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

---

The Edit Stage page appears.

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

**Edit Stage** [Close] [Maximize]

Next Cancel

**Name \***

Review

Stage Name is a required field

**Status title \***

Pending Review

Status title is a required field

**Description**

Undo Text Color Text Background Color Bold Italic Underline Bulleted List Numbered List Indent Outdent Paintbrush

Review

Click **Next**.

You can update the roles assigned to the stage.



The screenshot shows a dialog box titled "Edit Stage" with a close button (X) in the top right corner. Below the title bar are three buttons: "Previous" (blue), "Save" (blue), and "Cancel" (red). The dialog is divided into two main sections:

- Select Roles :** This section contains a "Select All" checkbox and a list of roles with checkboxes. The roles and their selection status are:
  - Select All
  - Administrator
  - Data Owner\_GER
  - Data Owner\_RO
  - Data Owner\_UK
  - Data Steward\_GER
  - Data Steward\_Hung
  - Data Steward\_RO
  - Data Steward\_UK
  - ETL Developer
  - Mapping\_Tester
  - Mapping Admin
  - Mapping Designer
  - Old\_DataSteward
- Select Governance Responsibilities:** This section contains a "Select All" checkbox and a list of responsibilities with checkboxes. The responsibilities and their selection status are:
  - Select All
  - Data Stewards
  - Technical Data Steward
  - Compliance Officer
  - Data Owners

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:

## 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.

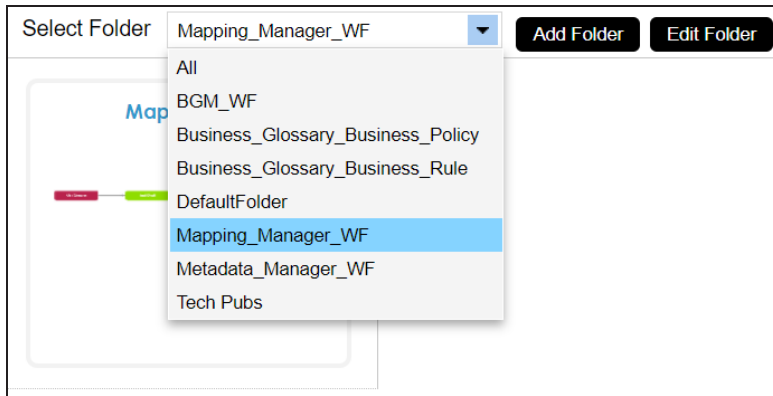
Before you assign workflows to a project:

- 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:

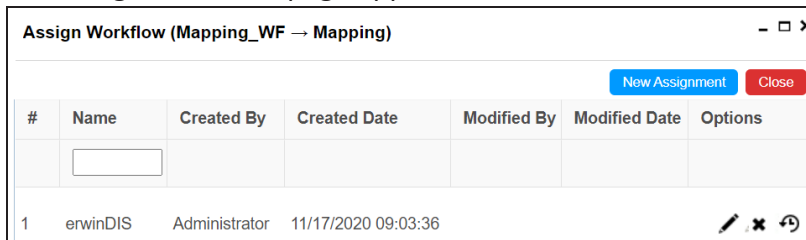
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



3. Hover over the required workflow, and click .

The Assign Workflow page appears.

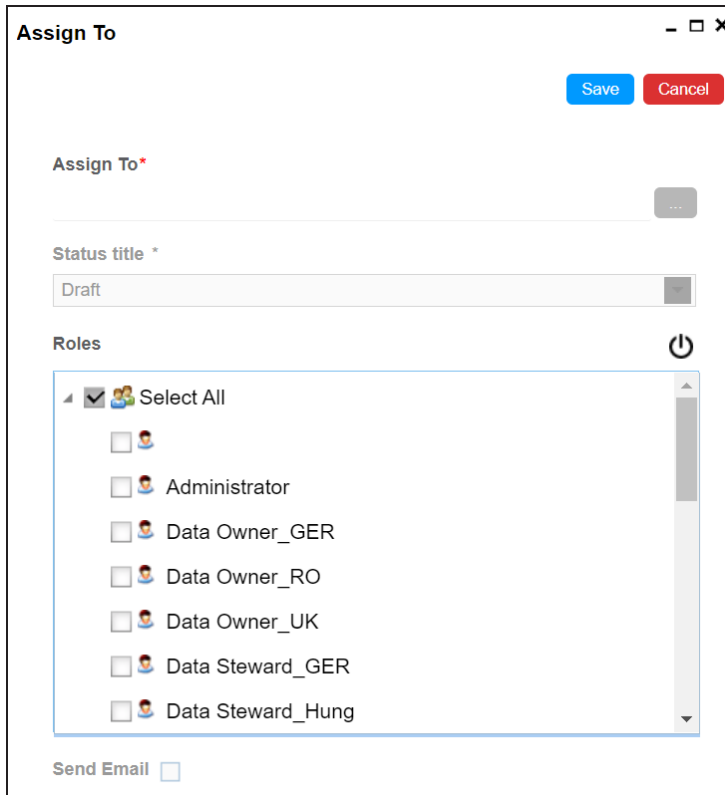


## Assigning Workflows to Projects

---

### 4. Click **New Assignment**.

The Assign To page appears.

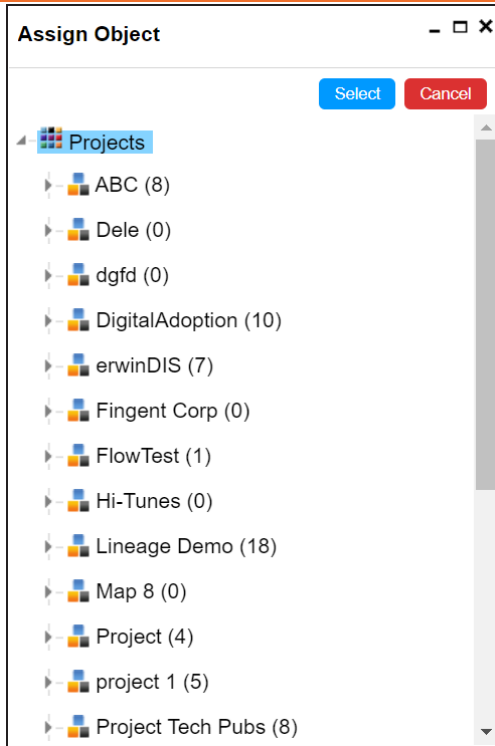


The screenshot shows a dialog box titled "Assign To" with a standard window control bar (minimize, maximize, close). In the top right corner, there are two buttons: "Save" (blue) and "Cancel" (red). Below the title bar, there is a label "Assign To\*" followed by a text input field and a small grey button with three dots. Underneath is a label "Status title \*" followed by a dropdown menu currently showing "Draft". The next section is labeled "Roles" and features a power icon on the right. It contains a list of roles, each with a checkbox and a user icon: "Select All" (checked), "Administrator", "Data Owner\_GER", "Data Owner\_RO", "Data Owner\_UK", "Data Steward\_GER", and "Data Steward\_Hung". At the bottom left, there is a "Send Email" label with an unchecked 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.

## Assigning Workflows to Projects

Current Object Status	Fallback/New Status
Draft	<ul style="list-style-type: none"><li>Draft</li><li>Pending Review</li><li>Pending Approve</li><li>Pending Publish</li></ul>

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 \*

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

## Assigning Workflows to Projects

---

from administrator's email ID. For more information on configuring administrator's email ID, refer to the [Configuring Email Settings](#) topic.

### 11. Click **Save**.

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

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



# Executing Workflows

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

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

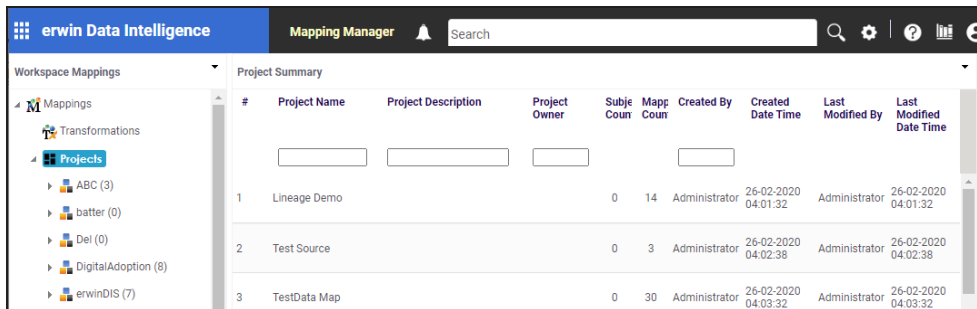
Executing workflows involves:

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

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

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

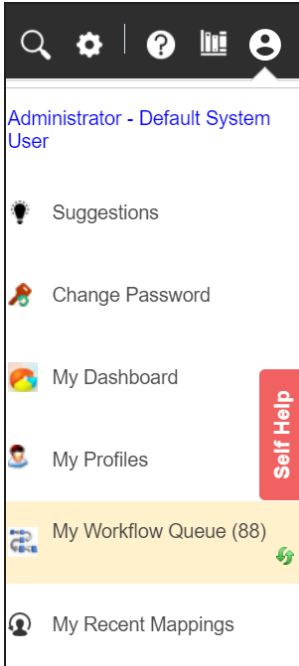
The Mapping Manager page appears.



#	Project Name	Project Description	Project Owner	Subje Count	Mapp Count	Created By	Created Date Time	Last Modified By	Last Modified Date Time
1	Lineage Demo			0	14	Administrator	26-02-2020 04:01:32	Administrator	26-02-2020 04:01:32
2	Test Source			0	3	Administrator	26-02-2020 04:02:38	Administrator	26-02-2020 04:02:38
3	TestData Map			0	30	Administrator	26-02-2020 04:03:32	Administrator	26-02-2020 04:03:32

2. Click .


## Executing Workflows



3. Click **My Workflow Queue**.

The My Workflow Queue page appears showing workflow queues.



My Workflow Queue						
Object Path :	<input type="text"/>	Object Name :	<input type="text"/>	Status Title :	<input type="text"/>	Object Description : <input type="text"/>
Bulk Update :	<input type="radio"/> OFF	WorkFlow :	<input type="text"/> 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	<a href="#">Informatica_m_CBDR_RDM_CASA</a>		Draft	Object created and moved to draft
2	Lineage Demo	Mapping	<a href="#">Talend_staging</a>		Draft	Object created and moved to draft
3	Lineage Demo	Mapping	<a href="#">test</a>		Draft	Object created and moved to draft
4	Lineage Demo	Mapping	<a href="#">TestDataMap1</a>		Draft	Object created and moved to draft

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.

## Executing Workflows

**My Workflow Queue**


Object Path :  Object Name : Erwin Status Title :  Object Description :   

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


#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	erwinDIS	Mapping	<a href="#">erwinSalesIntegration</a>		Draft	Assigning new workflow.
2	Project Tech Pubs	Mapping	<a href="#">erwinSalesIntegration</a>		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

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**

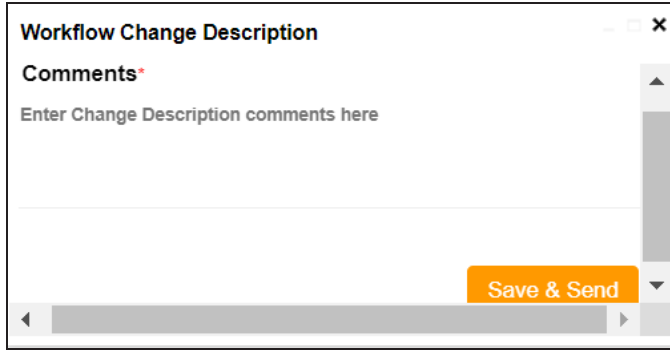
Modified By: **ksridhar** | Modified Date Time: **2020-10-14 08:02:07.943**

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.

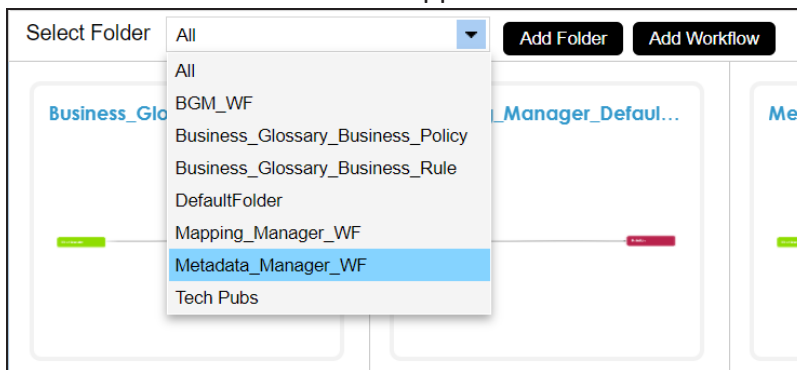
Before you assign workflows to an environment:

- 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.

#	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\*

Status title \*

Draft

Roles

- Select All
- Administrator
- Data Owner\_GER
- Data Owner\_RO
- Data Owner\_UK
- Data Steward\_GER
- Data Steward\_Hung

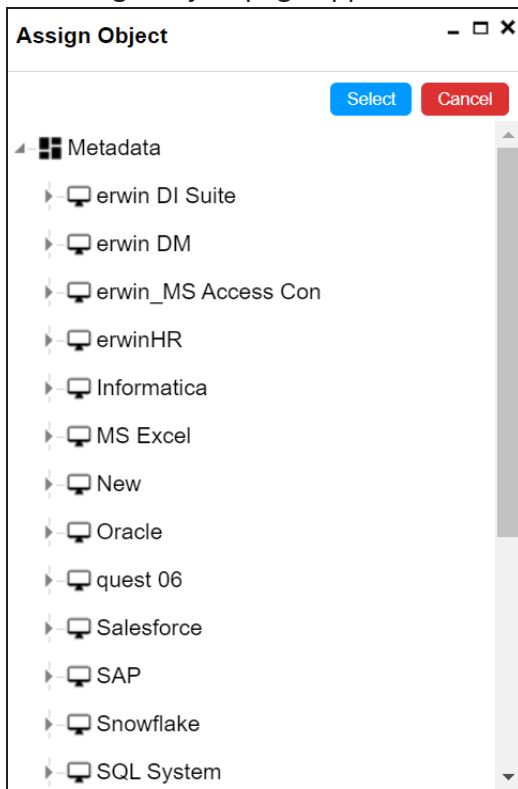
Send Email

## Assigning Workflows to Environments

---

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.



## Assigning Workflows to Environments

---

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.

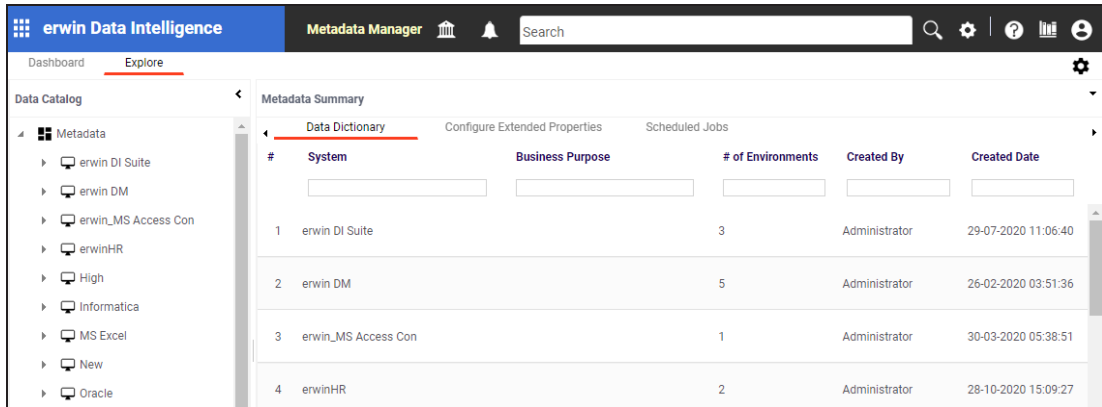
Executing workflows involves:

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 > Explore**.

The following page appears.



The screenshot shows the 'erwin Data Intelligence' interface. The 'Metadata Manager' section is active, displaying a 'Metadata Summary' table. The table has columns for '#', 'System', 'Business Purpose', '# of Environments', 'Created By', and 'Created Date'. The data rows are as follows:

#	System	Business Purpose	# of Environments	Created By	Created Date
1	erwin DI Suite		3	Administrator	29-07-2020 11:06:40
2	erwin DM		5	Administrator	26-02-2020 03:51:36
3	erwin_MS Access Con		1	Administrator	30-03-2020 05:38:51
4	erwinHR		2	Administrator	28-10-2020 15:09:27


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

The screenshot shows a window titled "My Workflow Queue" with search filters and a table of workflow items. The search filters include Object Path, Object Name, Status Title, and Object Definition. The table has columns for #, Object Path, Object Type, Object Name, Object Definition, Status Title, Comments, Assigned By, and Assigned Date.

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

The screenshot shows the same "My Workflow Queue" window after a search for "sql server". The search filters are updated, and the table now displays a single result.

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comm
1	erwin DM	Environment	<a href="#">Sql Server Production</a>		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 'Miscellaneous' section is active, displaying various configuration fields. A 'Send To - Review' button is visible in the top right corner.

Field	Value
Status	Draft
System Environment Name*	Sql Server Production
System Environment Type	Sql Server
Data Steward	-Select Data Steward-
Server Platform	<input type="checkbox"/> Apply To All Tables & Columns
Server OS Version	
File Management Type	
File Location	
Production System Name	Choose Production System
Production Environment Name	
Driver Name*	com.microsoft.sqlserver.jdbc.SQLS
DBMS Name/DSN*	Northwind
IP Address/Host Name*	localhost
Port	1433
User Name*	sa
Password*	[Masked]
Url*	[Masked]
DBMS Instance Schema	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 features a 'Comments\*' section with a text area for entering change description comments. A 'Save & Send' button is located at the bottom right of the window.

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.

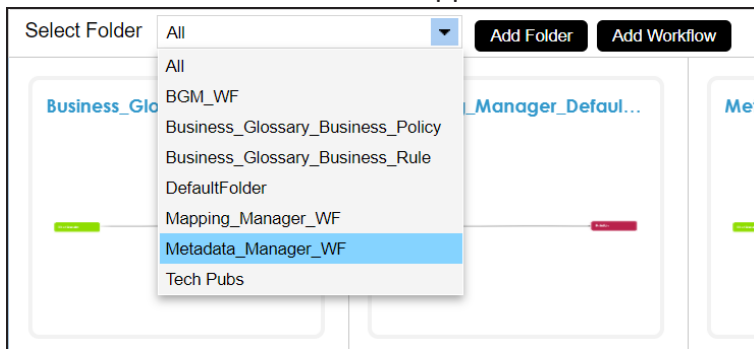
Before you assign workflows to tables:

- 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:

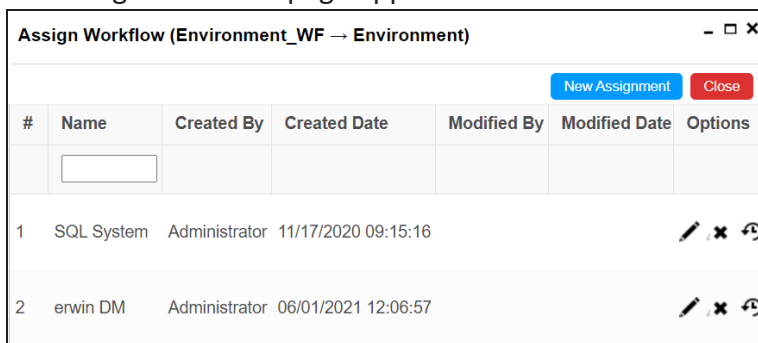
1. In the **Workflow Manager** page, select a folder.







All the workflows in the folders appear.



2. Hover over a workflow, and click .

The Assign Workflow page appears.

A screenshot of the 'Assign Workflow (Environment\_WF → Environment)' page. At the top right, there are 'New Assignment' and 'Close' buttons. Below is a table with the following data:

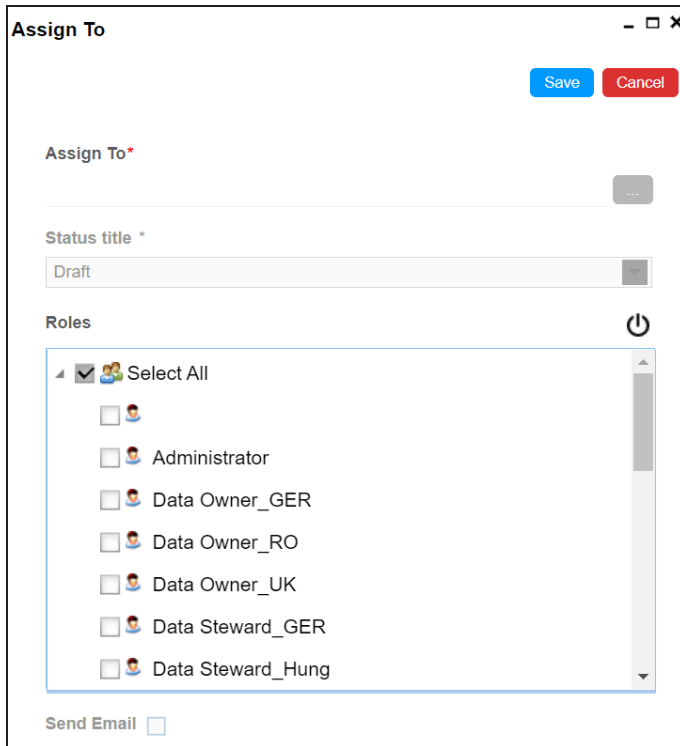
#	Name	Created By	Created Date	Modified By	Modified Date	Options
1	SQL System	Administrator	11/17/2020 09:15:16			  
2	erwin DM	Administrator	06/01/2021 12:06:57			  

## Assigning Workflows to Tables

---

### 3. Click **New Assignment**.

The Assign To page appears.

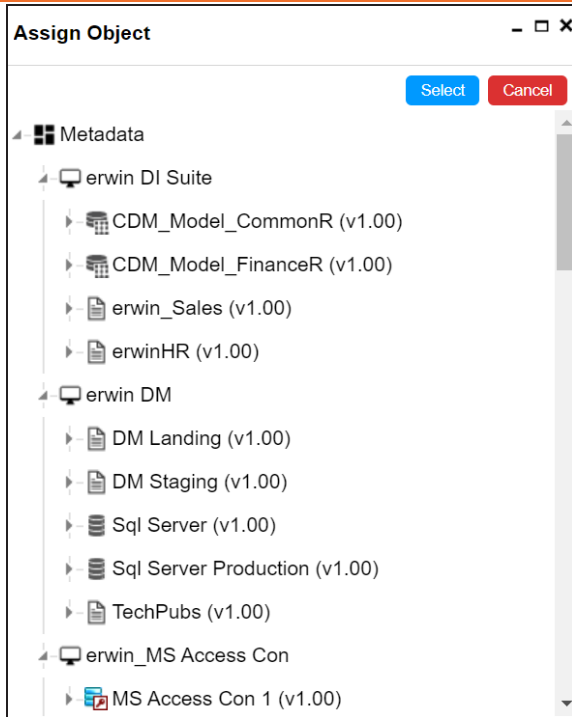


The screenshot shows a dialog box titled "Assign To" with a close button (X) in the top right corner. At the top right of the dialog are two buttons: "Save" (blue) and "Cancel" (red). Below these is a text input field labeled "Assign To\*" with a grey button containing three dots to its right. Underneath is a dropdown menu labeled "Status title \*" with "Draft" selected. Below that is a section titled "Roles" with a power icon to its right. This section contains a list of roles, each with a checkbox and a user icon: "Select All" (checked), "Administrator", "Data Owner\_GER", "Data Owner\_RO", "Data Owner\_UK", "Data Steward\_GER", and "Data Steward\_Hung". At the bottom left of the dialog is a checkbox labeled "Send Email".

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

The Assign Object page appears.

## Assigning Workflows to Tables

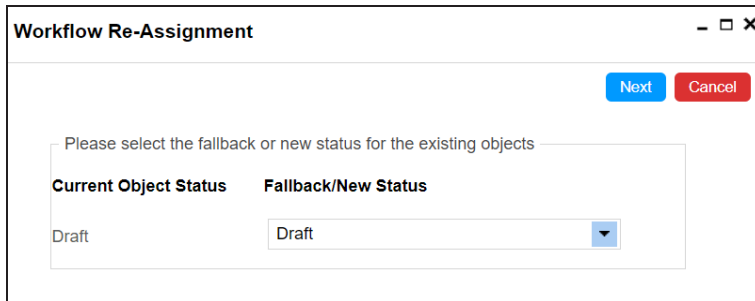


5. Click an Environment containing with required table.
6. Click **Select**.

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.



8. Select the appropriate Fallback/New Status.

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

9. Click **Next**.



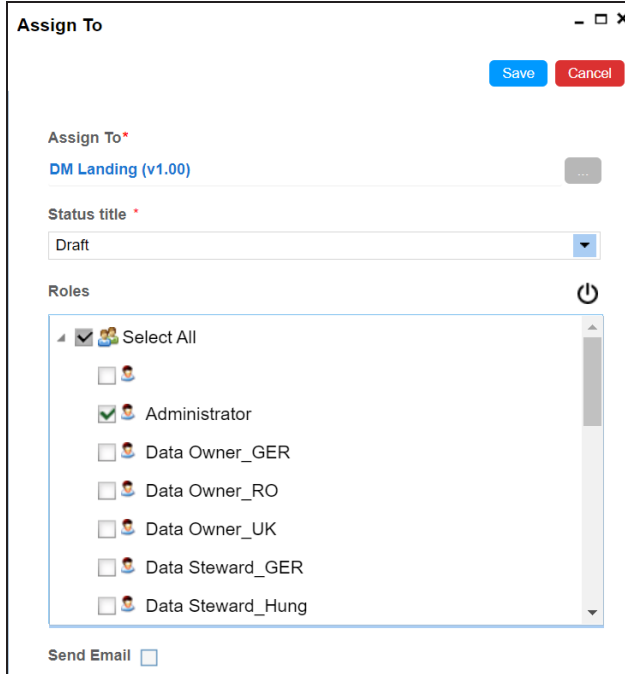
## Assigning Workflows to Tables

---

The Comments page appears.

10. Enter relevant comments, and click .

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



The screenshot shows a dialog box titled "Assign To". At the top right are "Save" and "Cancel" buttons. Below is the "Assign To" field containing "DM Landing (v1.00)". The "Status title" dropdown is set to "Draft". The "Roles" section is expanded, showing 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 is a "Send Email" checkbox.

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

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

12. Select the appropriate **Roles**.
13. Select the **Send Email** check box to receive email notification.
14. Click **Save**.

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

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

# Executing Workflows for Tables

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

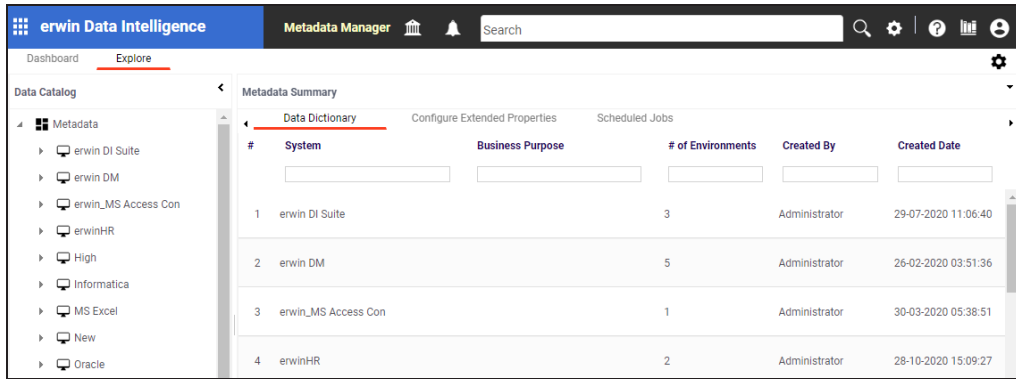
Executing workflows involves:

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

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

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

The following page appears.



The screenshot shows the 'erwin Data Intelligence' interface. The 'Metadata Manager' section is active, displaying a 'Metadata Summary' table. The table has columns for '#', 'System', 'Business Purpose', '# of Environments', 'Created By', and 'Created Date'. The data rows are as follows:

#	System	Business Purpose	# of Environments	Created By	Created Date
1	erwin DI Suite		3	Administrator	29-07-2020 11:06:40
2	erwin DM		5	Administrator	26-02-2020 03:51:36
3	erwin_MS Access Con		1	Administrator	30-03-2020 05:38:51
4	erwinHR		2	Administrator	28-10-2020 15:09:27

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 :  Off Workflow :  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	<a href="#">EmployeeName</a>		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
2	erwin DM/DM Landing	Table	<a href="#">Employees</a>		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
3	erwin DM/DM Landing	Table	<a href="#">Citizens</a>		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
4	erwin DM/DM Landing/Employees	Column	<a href="#">EmployeeID</a>		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16
5	erwin DM/DM Landing/Citizens	Column	<a href="#">CitizenID</a>		Draft	Object created and moved to draft	Administrator	02/26/2020 03:52:16

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

The search results are displayed.

**My Workflow Queue**

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

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

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

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

The Table View page appears.

## Executing Workflows for Tables

The screenshot shows a 'Table View' window with two tabs: 'Properties' (selected) and 'Extended Properties'. A 'Send To - Review' button is in the top right. The 'Technical Properties' section includes:

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

The 'Business Properties' section includes:

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

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

The Workflow Change Description page appears.

The screenshot shows a 'Workflow Change Description' dialog box with a 'Comments\*' section. The text 'Enter Change Description comments here' is displayed. A 'Save & Send' button is located at the bottom right of the dialog.

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

## Executing Workflows for Tables

---



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.

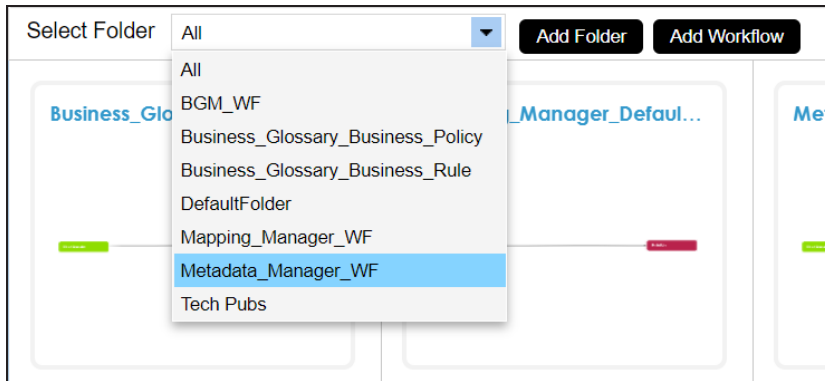
Before you assign workflows to columns:

- 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:

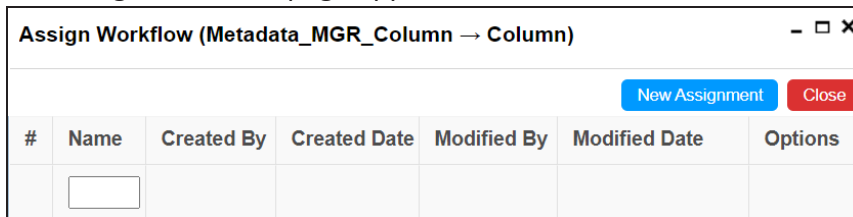
1. In the **Workflow Manager** page, select a folder.

All the workflows in the folder appear.



2. Hover over the required workflow and click .

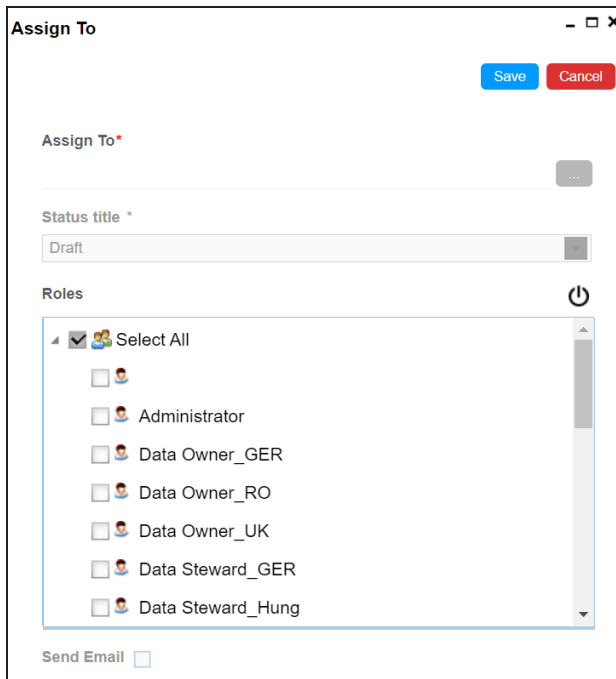
The Assign Workflow page appears.



3. Click **New Assignment**.

## Assigning Workflows to the Columns

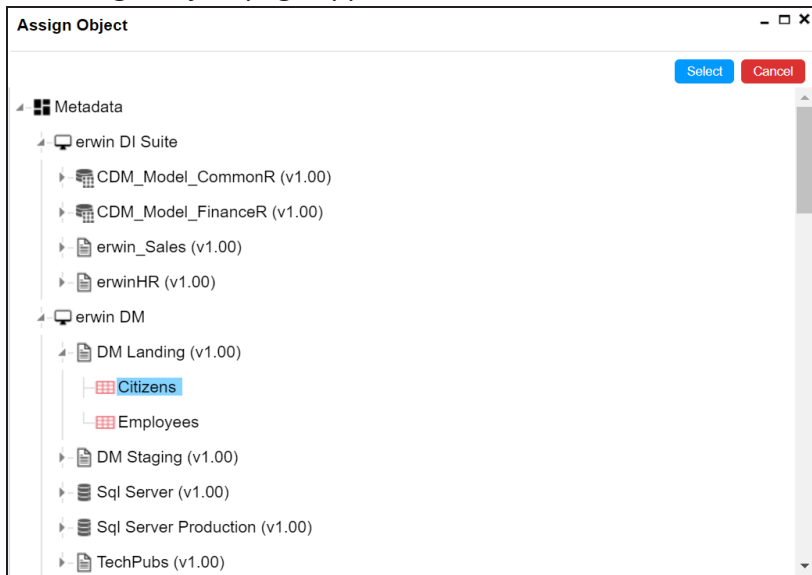
The Assign To page appears.



The 'Assign To' dialog box is shown. It has a title bar with standard window controls. At the top right are 'Save' and 'Cancel' buttons. Below the title bar is the 'Assign To\*' field with a dropdown arrow. Underneath is the 'Status title \*' field with 'Draft' selected. The 'Roles' section has a power icon and a list of roles with checkboxes: 'Select All' (checked), 'Administrator', 'Data Owner\_GER', 'Data Owner\_RO', 'Data Owner\_UK', 'Data Steward\_GER', and 'Data Steward\_Hung'. At the bottom left is a 'Send Email' checkbox.

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

The Assign Object page appears.



The 'Assign Object' dialog box is shown. It has a title bar with standard window controls. At the top right are 'Select' and 'Cancel' buttons. Below the title bar is a tree view under 'Metadata'. The tree view is expanded to show 'erwin DM' and 'Citizens' is selected. Other items in the tree include 'erwin DI Suite', 'CDM\_Model\_CommonR (v1.00)', 'CDM\_Model\_FinanceR (v1.00)', 'erwin\_Sales (v1.00)', 'erwinHR (v1.00)', 'DM Landing (v1.00)', 'Employees', 'DM Staging (v1.00)', 'Sql Server (v1.00)', 'Sql Server Production (v1.00)', and 'TechPubs (v1.00)'.

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

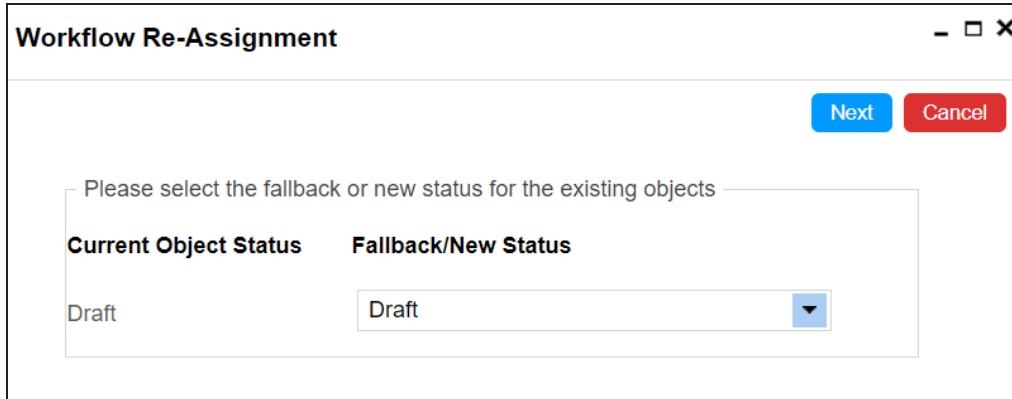
## Assigning Workflows to the Columns

---

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.



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: a blue "Next" button and a red "Cancel" button. Below the buttons is a text prompt: "Please select the fallback or new status for the existing objects". Underneath this prompt 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 with "Draft" selected and a downward-pointing arrow.

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.



## Assigning Workflows to the Columns

**Assign To**

Save Cancel

Assign To\*  
Citizens

Status title\*  
Draft

Roles

- Select All
- Administrator
- Data Owner\_GER
- Data Owner\_RO
- Data Owner\_UK
- Data Steward\_GER
- Data Steward\_Hung

Send Email

10. Select the **Status Title** from which the workflow starts.  
A Status Title is assigned to a stage while creating the stage.
11. Select the appropriate **Roles**.
12. Select the **Send Email** check box to receive email notification.
13. Click **Save**.

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

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

## Executing Workflows for Columns

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

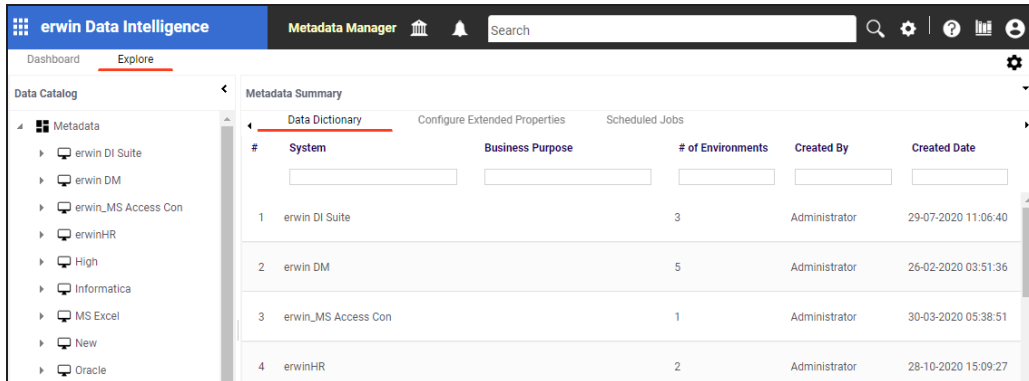
Executing workflows involves:

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

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

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

The following page appears.



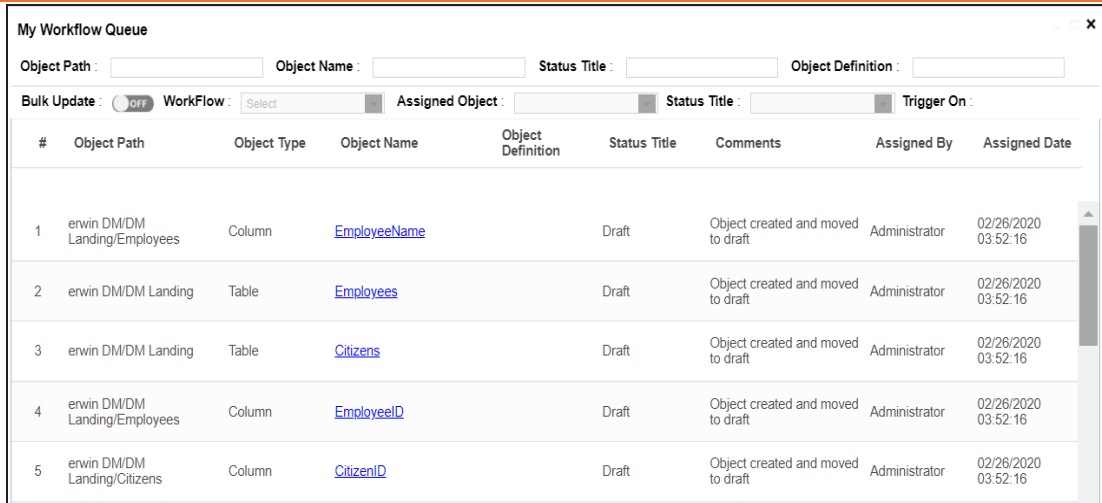
The screenshot shows the 'erwin Data Intelligence' interface. The 'Metadata Manager' section is active, displaying a 'Metadata Summary' table. The table has columns for '#', 'System', 'Business Purpose', '# of Environments', 'Created By', and 'Created Date'. There are four rows of data listed.

#	System	Business Purpose	# of Environments	Created By	Created Date
1	erwin DI Suite		3	Administrator	29-07-2020 11:06:40
2	erwin DM		5	Administrator	26-02-2020 03:51:36
3	erwin_MS Access Con		1	Administrator	30-03-2020 05:38:51
4	erwinHR		2	Administrator	28-10-2020 15:09:27

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

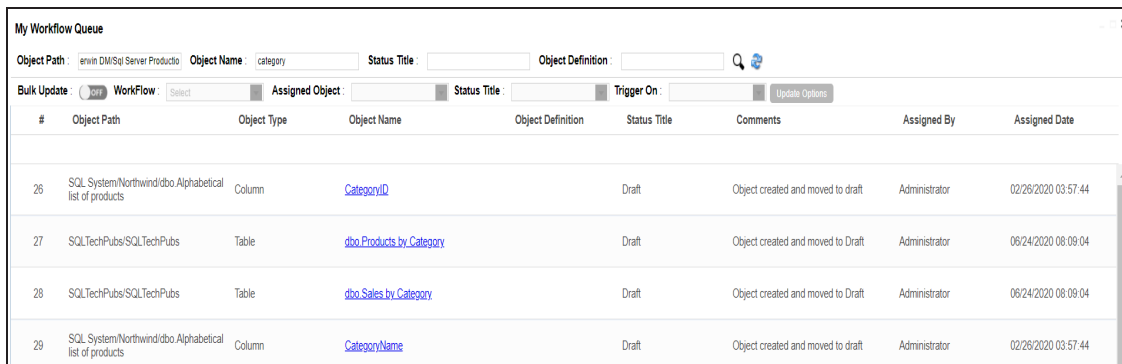


The screenshot shows the 'My Workflow Queue' interface. At the top, there are search filters for Object Path, Object Name, Status Title, and Object Definition. Below these are controls for Bulk Update (set to 'off'), Workflow (set to 'Select'), Assigned Object, Status Title, and Trigger On. The main area is a table with the following columns: #, Object Path, Object Type, Object Name, Object Definition, Status Title, Comments, Assigned By, and Assigned Date. Five items are listed, all with a status of 'Draft' and assigned to 'Administrator'.

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



The screenshot shows the 'My Workflow Queue' interface after a search. The search filters at the top are populated: Object Path is 'erwin DM/Sql Server Products', Object Name is 'category', and a search icon is visible. The table below shows four search results, all with a status of 'Draft' and assigned to 'Administrator'.

#	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	<a href="#">CategoryID</a>		Draft	Object created and moved to draft	Administrator	02/26/2020 03:57:44
27	SQLTechPubs/SQLTechPubs	Table	<a href="#">dbo.Products by Category</a>		Draft	Object created and moved to Draft	Administrator	06/24/2020 08:09:04
28	SQLTechPubs/SQLTechPubs	Table	<a href="#">dbo.Sales by Category</a>		Draft	Object created and moved to Draft	Administrator	06/24/2020 08:09:04
29	SQL System/Northwind/dbo.Alphabetical list of products	Column	<a href="#">CategoryName</a>		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 a 'Column View' window with a 'Properties' tab selected. The 'Technical Properties' section is expanded, displaying various attributes for the column 'CitizenID'. The 'Attribute Type' is set to 'ENTITY\_ELEMENT' and the 'Workflow Status' is 'Draft'. A 'Send To - Review' button is visible in the top right corner.

Technical Properties	
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

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

The Workflow Change Description page appears.

The screenshot shows a 'Workflow Change Description' dialog box with a 'Comments' section. The text 'Enter Change Description comments here' is displayed in a text area. A 'Save & Send' button is located at the bottom right of the dialog.

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.

## Executing Workflows for Columns

---



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.

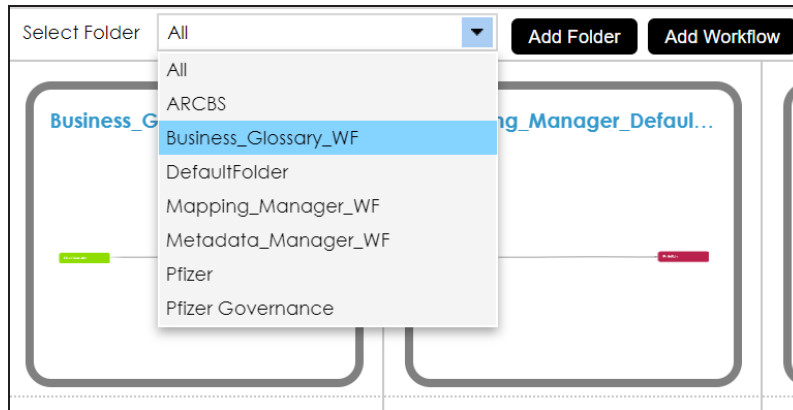
Before you assign workflows to business terms:

- 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.

## Assigning Workflows to Business Terms

#	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\*

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

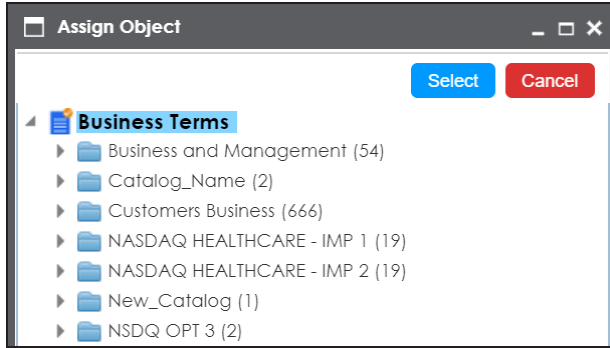
Send Email

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

The Assign Object page appears.



## Assigning Workflows to Business Terms

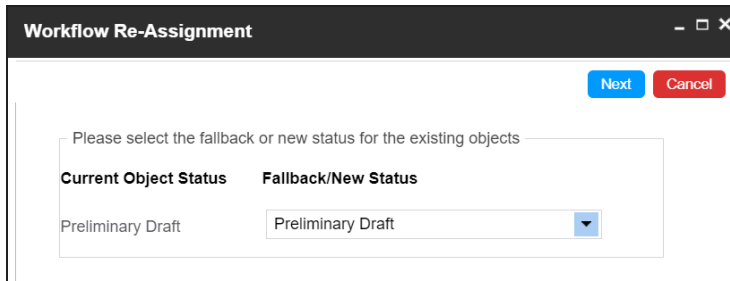


6. Select a catalog and click **Select**.

A warning message appears.

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

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



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

The screenshot shows the 'Assign To' dialog box. At the top right, there are 'Save' and 'Cancel' buttons. The 'Assign To\*' field is set to 'Customer Terms'. The 'Status title\*' dropdown is set to 'Preliminary Draft'. Under 'Roles', the 'Select All' checkbox is checked, and several roles are selected with green checkmarks: Administrator, Data Owner\_GER, Data Owner\_RO, and Data Steward\_GER. Under 'Governance Responsibility', the 'Select All' checkbox is unchecked, and no roles are selected. At the bottom left, there is a 'Send Email' checkbox which is currently unchecked.

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.

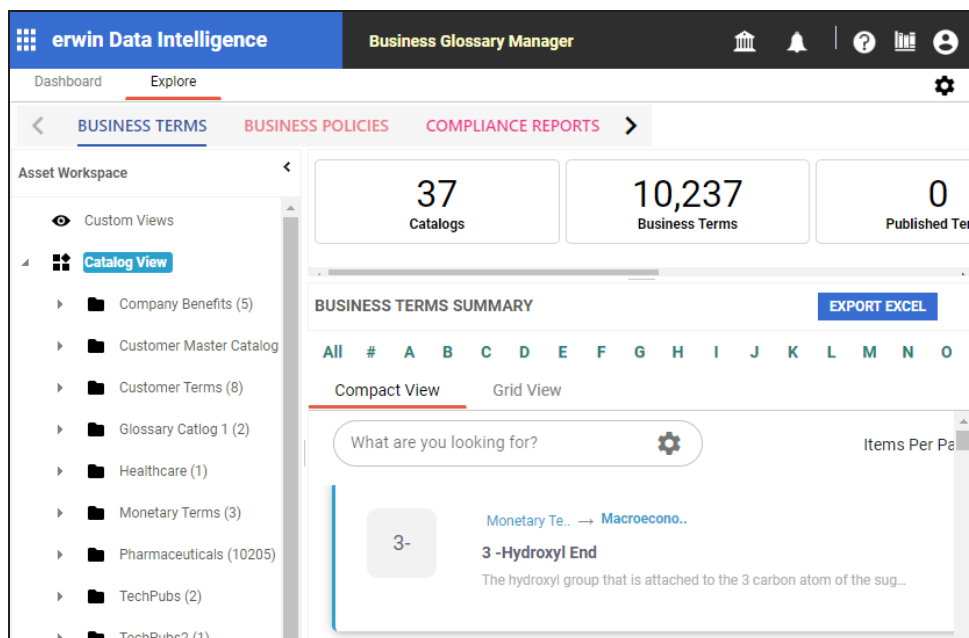
Executing workflows involves:

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

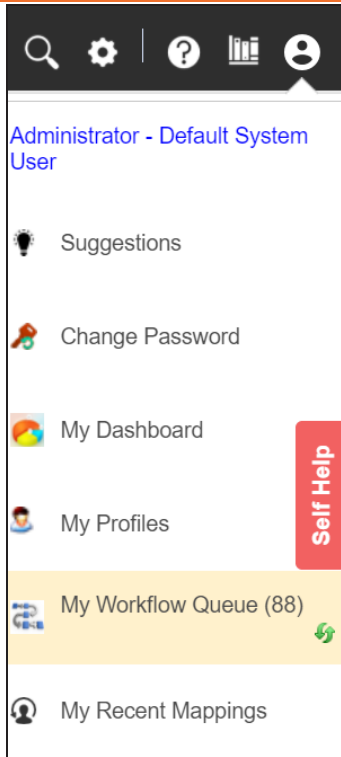
To execute workflows for the business terms, follow these steps:

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.


## Executing Workflows for Business Terms

**My Workflow Queue**

Object Path :  Object Name :  Status Title  Object Description :  

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

#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	Testing Techniques	Business Term	<a href="#">Agile Testing</a>	Testing Moves the project Forward: When following conventional methods, testing is considered as quality gate but agile testing provide feedback on an ongoing basis and the product meets the business demands.	Preliminary Draft	Object created and moved to draft
2	Glossary Catlog 1/Metadata Management/Metadata Manager	Business Term	<a href="#">Beta Testing</a>	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.	Preliminary Draft	Object created and moved to Draft

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.

## Executing Workflows for Business Terms

**My Workflow Queue**

Object Path :  Object Name : customer|  Status Title :

Bulk Update :  OFF Workflow :  Assigned Object :

#	Object Path	Object Type	Object Name
1	Customer Master Catalog	Business Term	<a href="#">CUSTOMER</a>
2	TechPubs	Business Term	<a href="#">Customer Address</a>
3	TechPubs	Business Term	<a href="#">Customer Email</a>
4	Customer Terms	Business Term	<a href="#">Customer First Name</a>
5	Customer Terms	Business Term	<a href="#">Customer Last Name</a>
6	Customer Terms	Business Term	<a href="#">Customer Phone Number</a>

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 L

Term Details  Acronym

Business Term  
CUSTOMER

Definition  
a person who buys your product

Workflow Status **Pending Review**

Governance Responsibilities

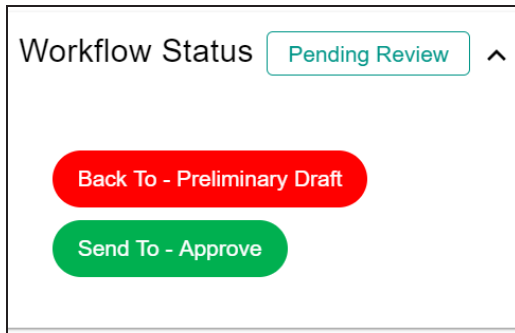
Data Stewards  
Mike Mannigan Mike Menza

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

## Executing Workflows for Business Terms

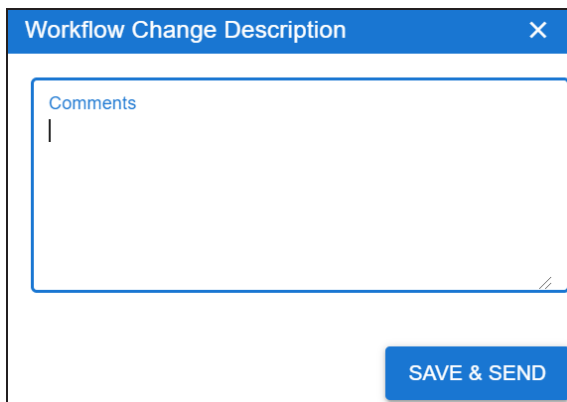
---

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.

## 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.

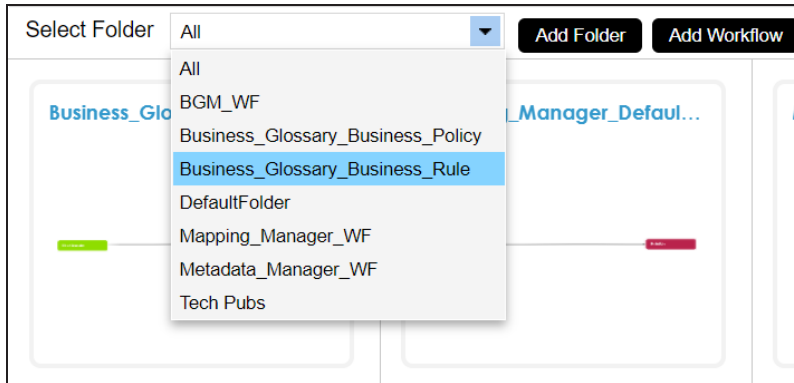
Before you assign workflows to business rules:

- 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

#	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\*

Status title \*

Preliminary Draft

Roles

- Select All
- Administrator
- Data Owner\_GER
- Data Owner\_RO
- Data Owner\_UK
- Data Steward\_GER
- Data Steward\_Hung

Governance Responsibilities

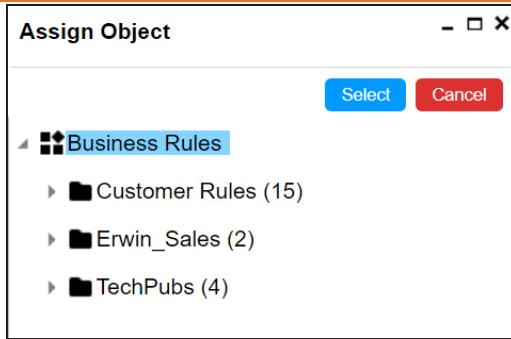
- Select All
- Data Stewards
- Data Owners
- Technical Data Steward
- Compliance Officer

Send Email

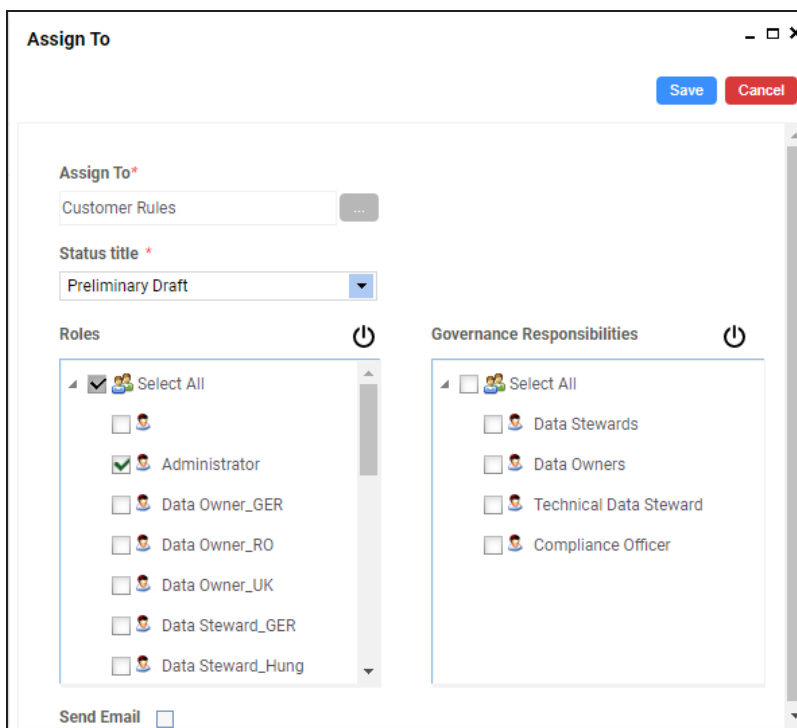
5. In the **Assign To** field, click .

The Assign Object page appears.

## Assigning Workflows to Business Rules



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**.

## Assigning Workflows to Business Rules

---

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.

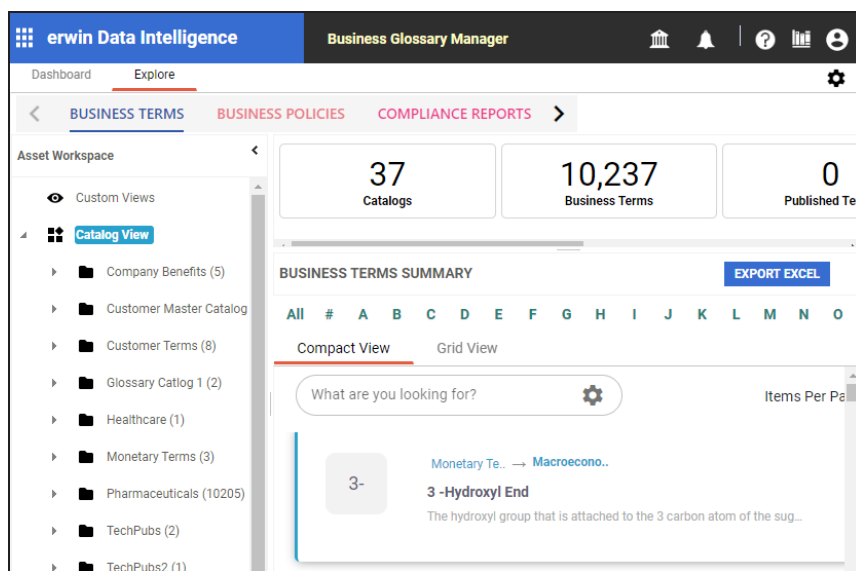
Executing workflows involves:

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:

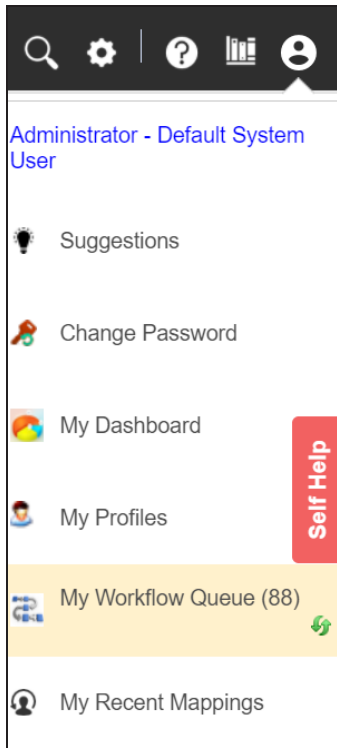
1. Go to **Application Menu > Data Literacy > Business Glossary Manager > Explore.**



2. Click .


## Executing Workflows for Business Rules

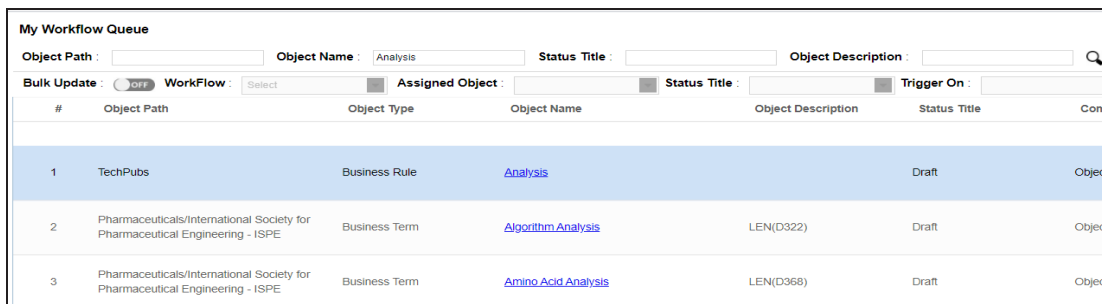
The available options appear.



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 .



#	Object Path	Object Type	Object Name	Object Description	Status Title	Com
1	TechPubs	Business Rule	<a href="#">Analysis</a>		Draft	Object
2	Pharmaceuticals/International Society for Pharmaceutical Engineering - ISPE	Business Term	<a href="#">Algorithm Analysis</a>	LEN(D322)	Draft	Object
3	Pharmaceuticals/International Society for Pharmaceutical Engineering - ISPE	Business Term	<a href="#">Amino Acid Analysis</a>	LEN(D368)	Draft	Object

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

The <Business\_Rule> page appears.

## Executing Workflows for Business Rules

The screenshot shows a web interface for a business rule named "Respect time" under the "Erwin\_Sales" category. The interface includes a navigation bar with "View Business Rule" (selected), "Associations", "Rich Media Library", "WorkFlow Log", and "History". Below the navigation bar, there are three main sections: "Rule Details" on the left, "Workflow Status" on the top right, and "Governance Responsibilities" and "Classification" on the bottom right. The "Rule Details" section contains a "Business Rule" field with the value "Respect time" and a "Definition" field with the text: "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 "Workflow Status" section shows a dropdown menu currently set to "Preliminary Draft". The "Governance Responsibilities" section displays "No Assignments Found" in red text. The "Classification" section has a toggle switch for "Sensitive Data Indicator(SDI)" which is currently turned off.

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-pointing arrow. Below the status, there is 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 a dialog box titled "Workflow Change Description". It has a blue header bar with a close button (X). Below the header, there is a 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 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.

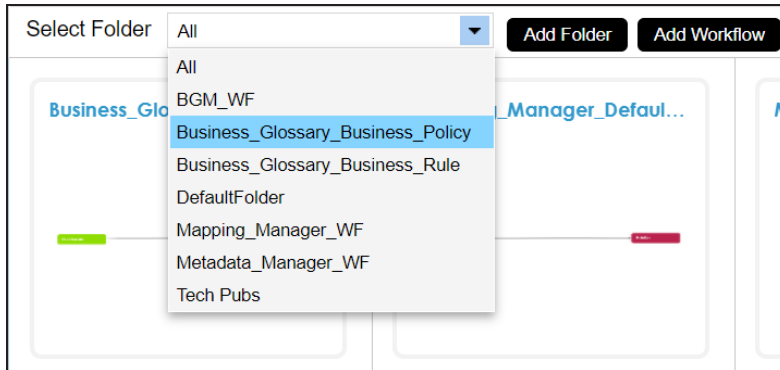
Before you assign workflows to business policies:

- 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

#	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**

Assign To\*

Status title \*  
Preliminary Draft

**Roles**

- Select All
- Administrator
- Administrator
- Data Owner\_GER
- Data Owner\_RO
- Data Owner\_UK
- Data Steward\_GER
- Data Steward\_Hung

**Governance Responsibilities**

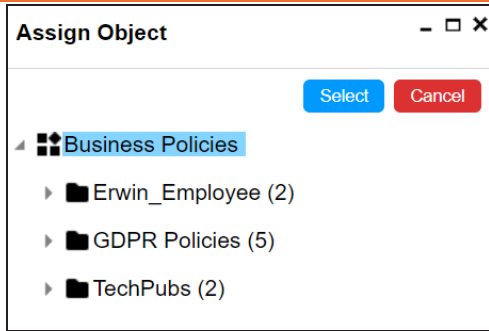
- Select All
- Data Stewards
- Data Owners
- Technical Data Steward
- Compliance Officer

Send Email

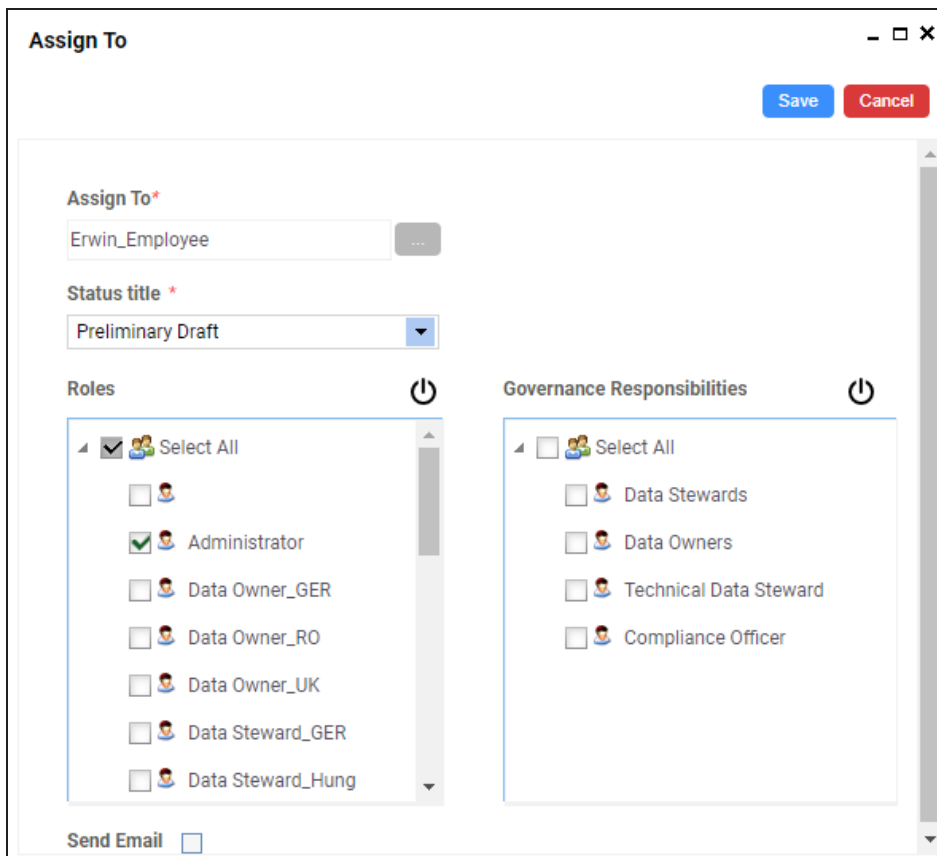
5. In the **Assign To** field, click

The Assign Object page appears.

## Assigning Workflows to Business Policies



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

## Assigning Workflows to Business Policies

---

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.

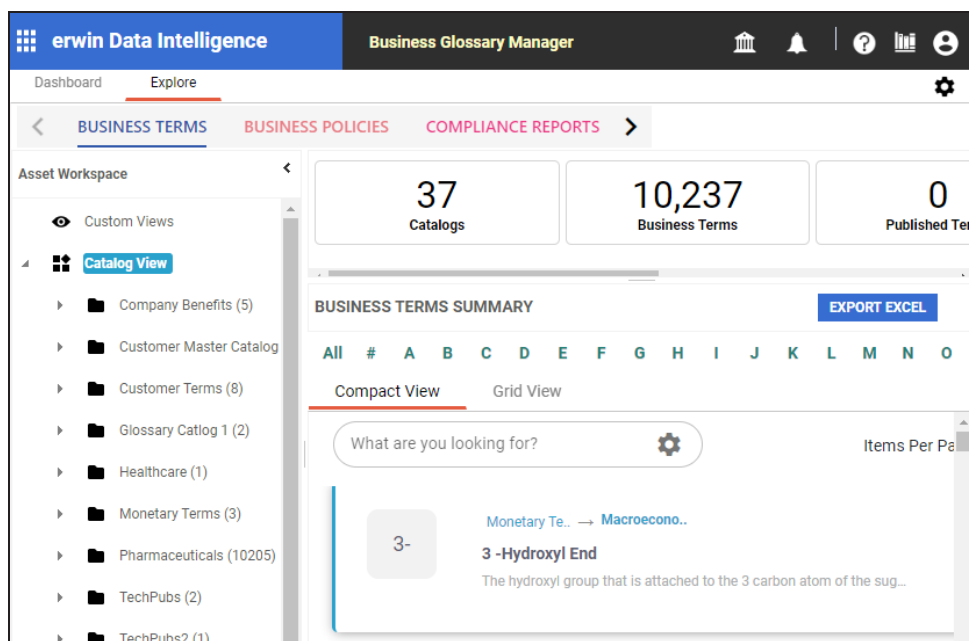
Once the workflow is assigned to the business policy, it can be executed via the Workflow Queue.

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:

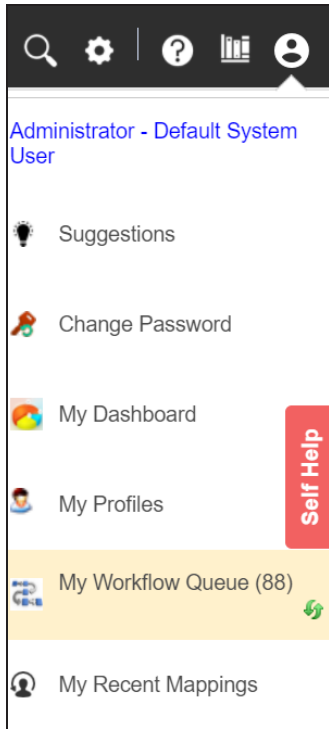
1. Go to **Application Menu > Data Literacy > Business Glossary Manager > Explore.**



## Executing Workflows for Business Policies


2. Click .

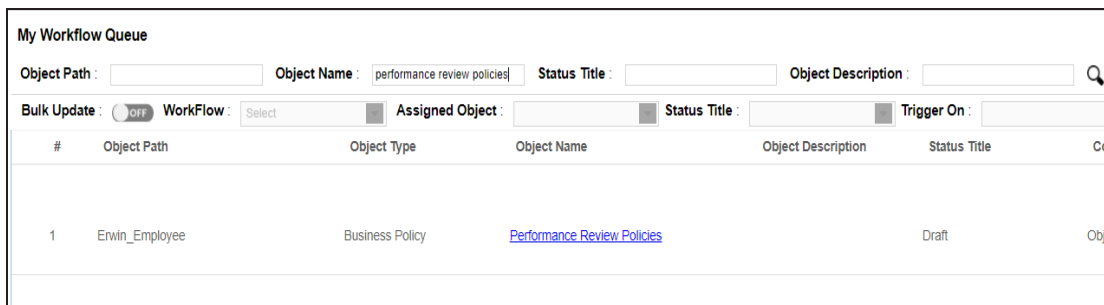
The available options appear.



3. Click **My Workflow Queue**.

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

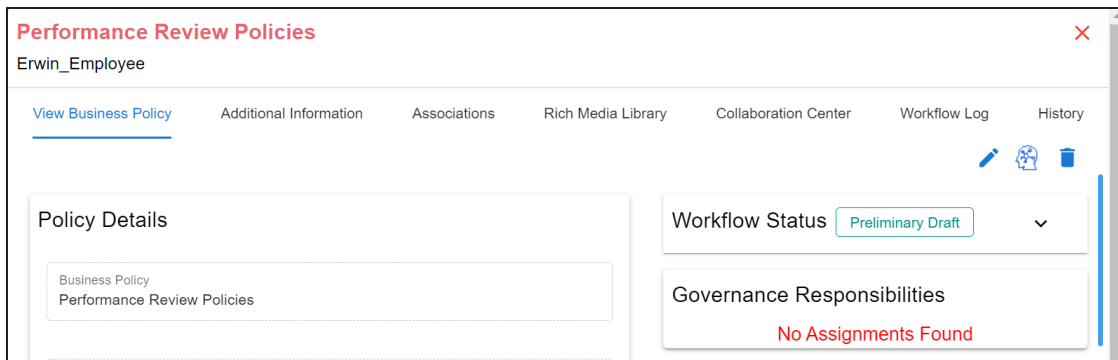
You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .



## Executing Workflows for Business Policies

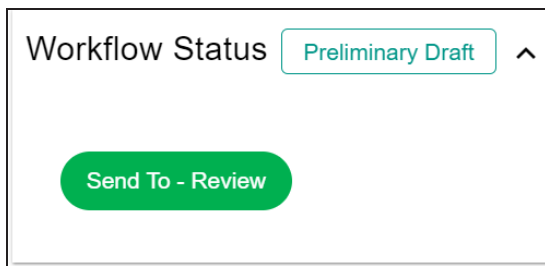
4. Click the **<Object Name>** appearing as a hyperlink.

The **<Business\_Policy>** page appears.



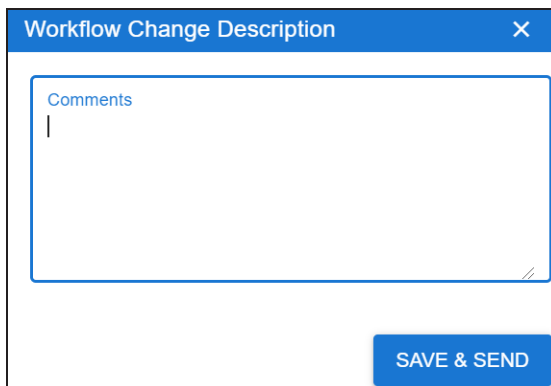
5. Click the **Workflow Status** drop down.

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.



## 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](#).



# Managing Data Marketplace Workflows

You can create workflows for datasets and other marketplace assets in the Data Marketplace module.

Creating and configuring data marketplace workflows involves:

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

After configuring generic workflows you can [assign it to datasets](#).

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. For more information on executing workflow for datasets, refer to [Executing Workflows for Data Marketplace](#) topic.

## Assigning Workflows to Datasets

After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to datasets in the Data Marketplace.

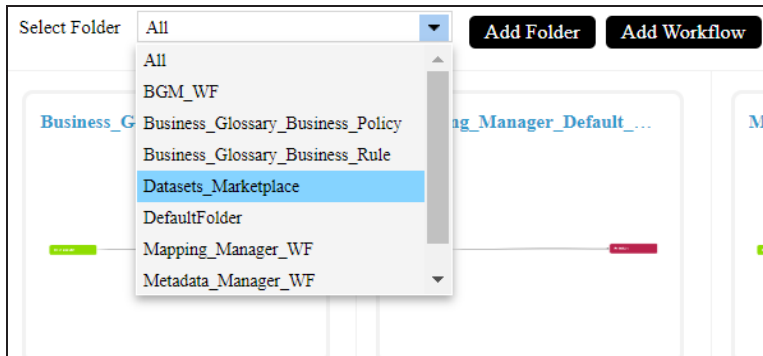
Before you assign workflows to datasets:

- Ensure that you choose **Data Marketplace** as a module and **Datasets** while adding the workflow to the folder.
- Note that the default workflow, Data Marketplace Workflow is assigned to all the datasets. Hence, you need to override the existing default workflow.

To assign workflows to datasets, follow these steps:

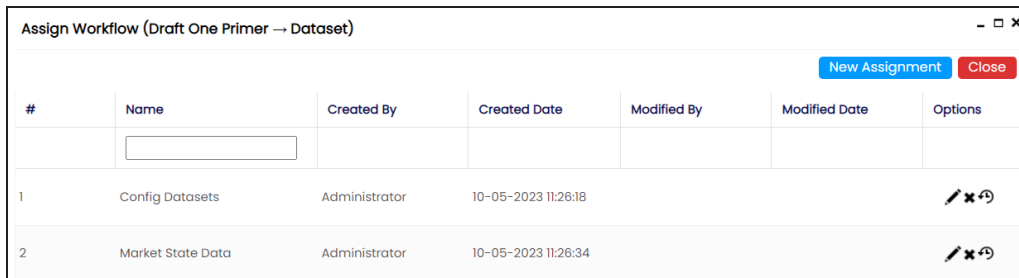
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.







All the workflows in the folder appear.



3. Hover over a workflow and click .

The Assign Workflow page appears.

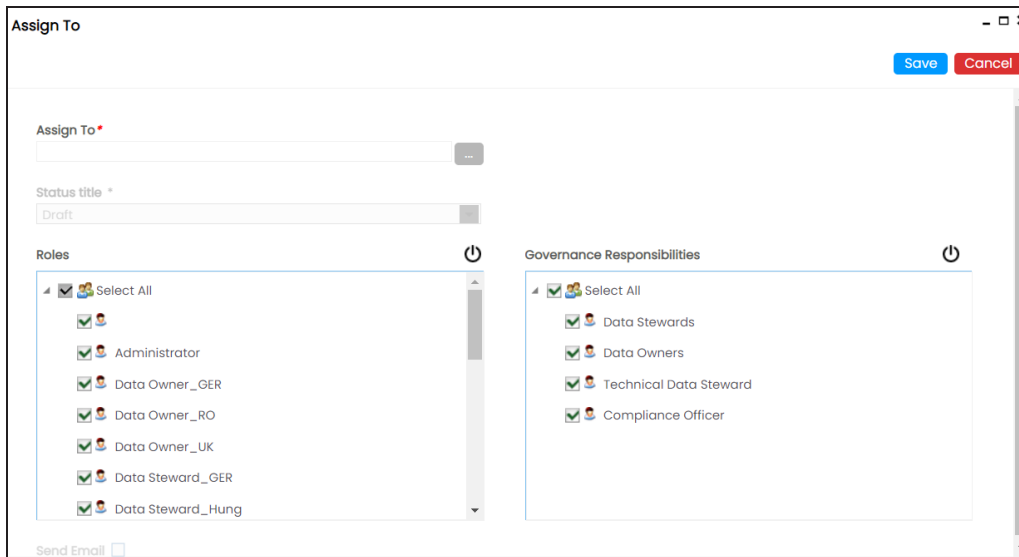
A screenshot of the 'Assign Workflow (Draft One Primer → Dataset)' page. It features a table with columns for '#', 'Name', 'Created By', 'Created Date', 'Modified By', 'Modified Date', and 'Options'. There are two rows of data. Above the table are buttons for 'New Assignment' and 'Close'.

#	Name	Created By	Created Date	Modified By	Modified Date	Options
1	Config Datasets	Administrator	10-05-2023 11:26:18			  
2	Market State Data	Administrator	10-05-2023 11:26:34			  

## Assigning Workflows to Datasets

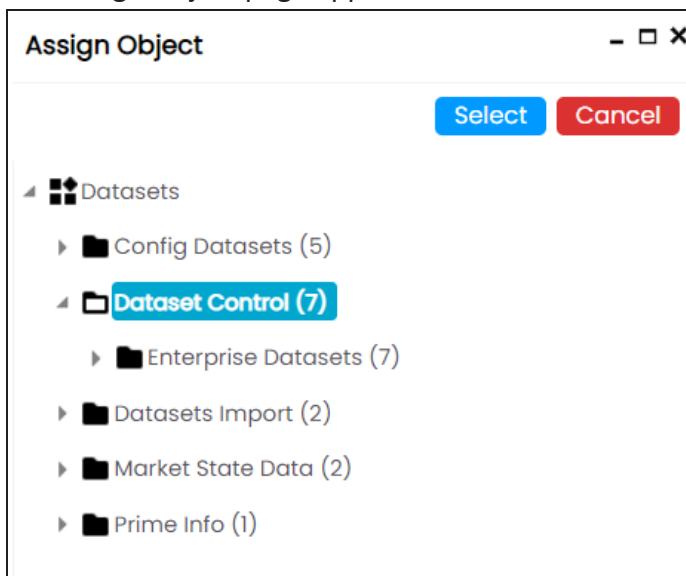
### 4. Click **New Assignment**.

The Assign To page appears.



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

The Assign Object page appears.



## Assigning Workflows to Datasets

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

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

The screenshot shows a dialog box titled "Assign To" with a "Save" button and a "Cancel" button. The "Assign To" field is filled with "Dataset Control". The "Status title" dropdown is set to "Draft". The "Roles" section has a "Select All" checkbox checked and a list of roles: Administrator, Data Owner\_GER, Data Owner\_RO, Data Owner\_UK, Data Steward\_GER, and Data Steward\_Hung, all with checked checkboxes. The "Governance Responsibilities" section also has a "Select All" checkbox checked and a list: Data Stewards, Data Owners, Technical Data Steward, and Compliance Officer, all with checked checkboxes.

7. In Status Title field, select a status.

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

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

8. Click **Save**.

The workflow is assigned to the selected catalog in the Data Marketplace and it applies to all the datasets under the catalog.

Once the workflow is assigned successfully to a dataset in data marketplace, 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 Datasets via the Workflow Queue](#) topic.

## Executing Workflows for Datasets

A workflow assigned to a dataset catalog applies to all the datasets 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.

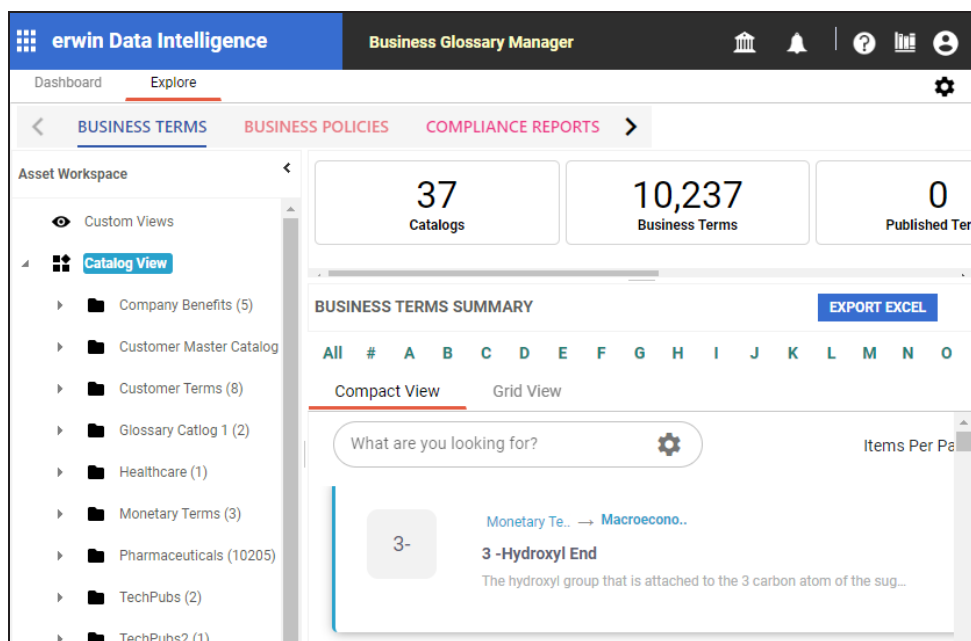
Executing workflows involves:

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

To execute workflows for the datasets, follow these steps:

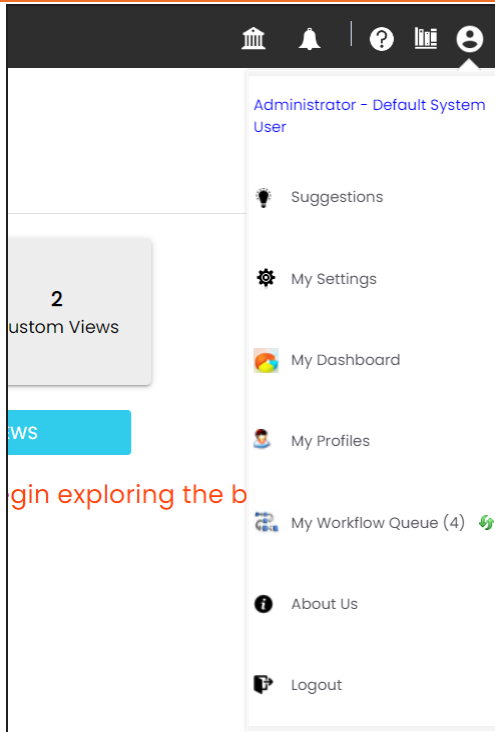
1. Go to **Application Menu > Data Marketplace > Datasets > Explore**.

The following page appears.



2. Click .


## Executing Workflows for Datasets



### 3. Click **My Workflow Queue**.

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

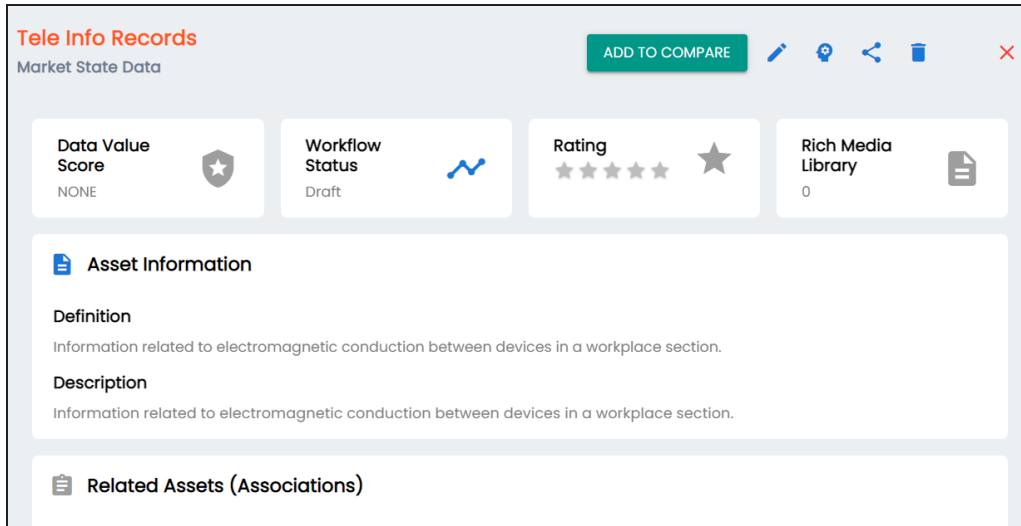
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Market State Data	Dataset	<a href="#">Tele Info Records</a>	Information related to electromagnetic conduction between devices in a workplace section.	Draft	Object created and moved to Draft	Administrator	10-05-2023 12:47:37
2	Config Datasets	Dataset	<a href="#">Install Configurations</a>		Draft	Object created and moved to Draft	Administrator	10-05-2023 13:18:37
3	Config Datasets	Dataset	<a href="#">Component Connectors</a>	Contains connector details and references.	Draft	Object created and moved to Draft	Administrator	10-05-2023 13:19:37
4	Config Datasets	Dataset	<a href="#">Inter Infer Datasets</a>		Draft	Object created and moved to Draft	Administrator	22-05-2023 07:49:25

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

## Executing Workflows for Datasets

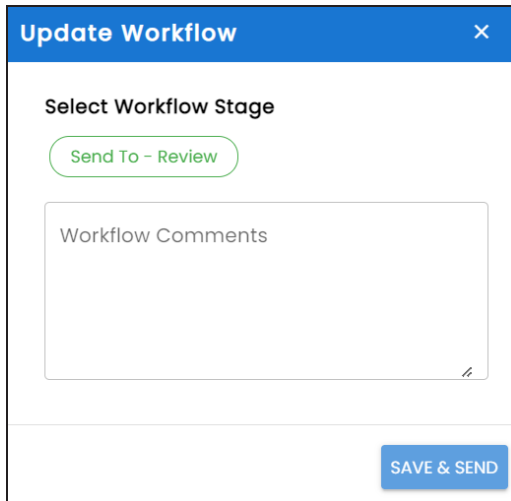
4. Click the <Object\_Name> appearing as a hyperlink.

The dataset summary page appears.



5. Hover over the Workflow Status card and click  to edit.

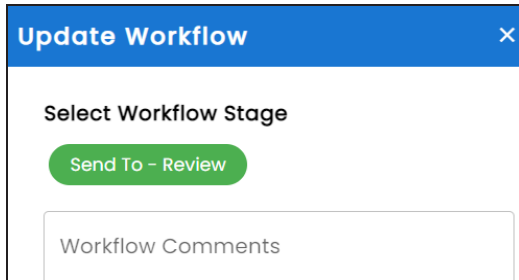
The Update Workflow page appears. These options depend on the stages of the assigned workflow.



## Executing Workflows for Datasets

---

6. Click **Send To - <Next\_Stage>** to move the object to the next stage of the workflow. The Send To - <Next\_Stage> option changes to green.



7. Enter workflow comments and then, click **Save & Send**.

The workflow status is updated to the <Title\_Status> of the 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 datasets, refer to the [Viewing Workflow Logs](#) topic.

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