



erwin Data Intelligence Suite

Workflow Management Guide

Release v10.2

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Contents

Legal Notices	2
Contents	5
Managing Workflows	7
Using Workflow Manager	7
Adding Folders	8
Edit Folders	9
Delete Folders	10
Adding Workflows	10
Edit Workflows	12
Delete Workflows	13
Configuring Workflows	14
Managing Mapping Manager Workflows	21
Assigning Workflows to Projects	22
Executing Workflows	26
Managing Metadata Manager Workflows	30
Assigning Workflows to Environments	31
Executing Workflows for Environments	33
Assigning Workflows to Tables	37
Executing Workflows for Tables	41
Assigning Workflows to the Columns	44
Executing Workflows for Columns	48
Managing Business Glossary Manager Workflows	51

Assigning Workflows to Business Terms	52
Executing Workflows for Business Terms	55
Assigning Workflows to Business Rules	59
Executing Workflows for Business Rules	61
Assigning Workflows to Business Policies	64
Executing Workflows for Business Policies	67

Managing Workflows

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

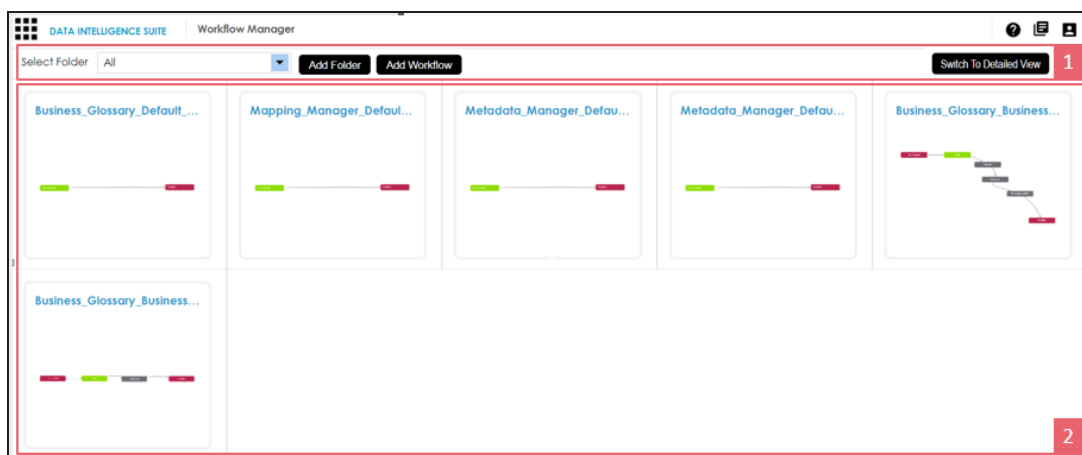
Also, you can create a collection of workflows and assign those workflows to any module based on the requirement.

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

Using Workflow Manager

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

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



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

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

Using Workflow Manager involves:

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

Adding Folders

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

Note: You create workflows, ensure that you create a folder.

To create folders, follow these steps:

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

The Add Folder page appears.

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

For example:

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

4. Click **Save**.

The new folder is created.

Once a folder is created, you can:

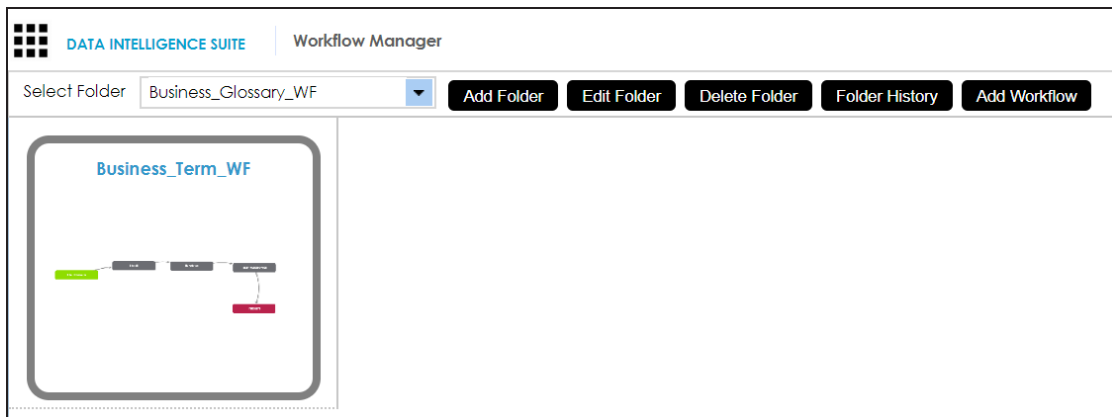
- [Add workflows](#)
- [Edit folders](#)
- [Delete folders](#)

Edit Folders

To update a folder information, follow these steps:

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

The Edit Folder page appears, and update necessary fields.



3. Click **Save**.

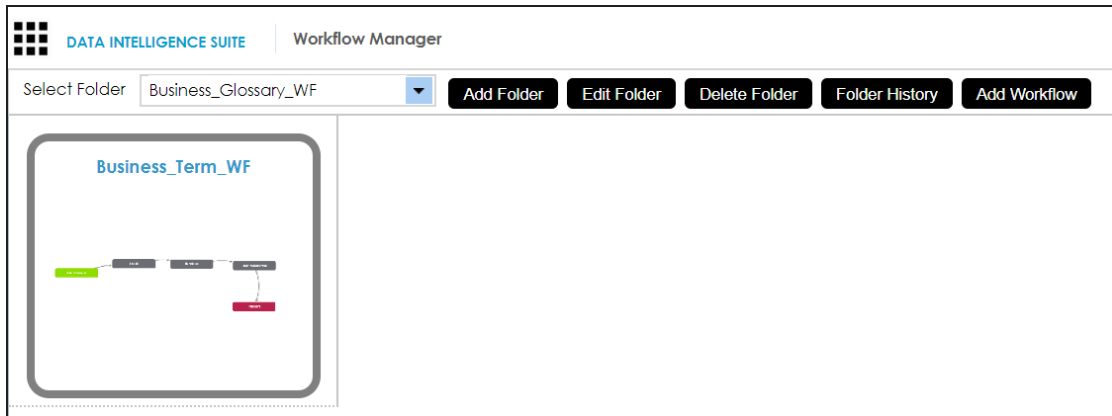
Delete Folders

To delete a folder, follow these steps:

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

A warning message appears.

Note: Deleting a folder also deletes the workflows in it. deletes allpage appears, and update necessary fields.



3. Click **Yes**.

The folder is deleted.

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

Adding Workflows

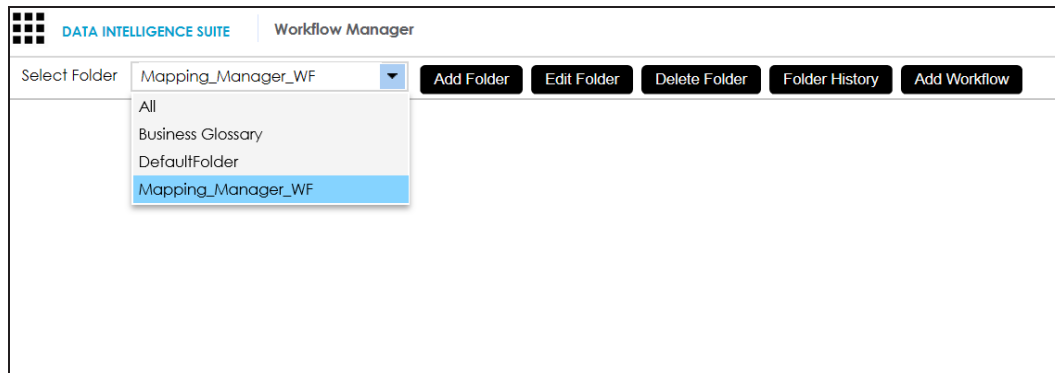
You can create workflows and add them to a folder.

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

- Business Glossary Manager
- Metadata Manager
- Mapping Manager

To add workflows, follow these steps:

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



2. Click **Add Workflow**.

The Add Workflow page appears.

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

Field Name	Description
Folder	Select a folder from the drop-down to add workflow.
Module	Select an applicable module for this workflow from the drop-down. You can create workflow for Business Glossary Manager, Metadata Man-

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

4. Click **Save**.

The workflow is added to the folder.

Once a workflow is added, you can:

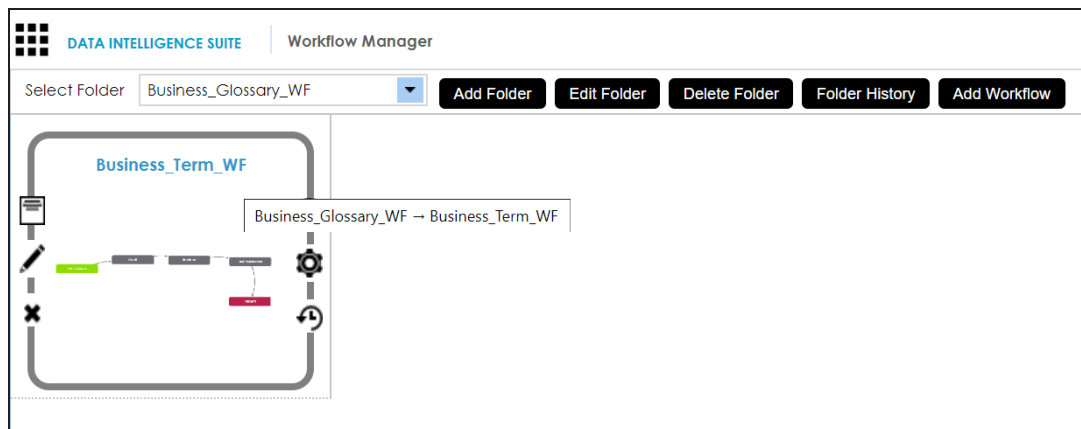
- [Configure workflows](#)
- [Edit workflows](#)
- [Delete workflows](#)


Edit Workflows

To update or edit a workflow, follow these steps:

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

2. Hover over a workflow.



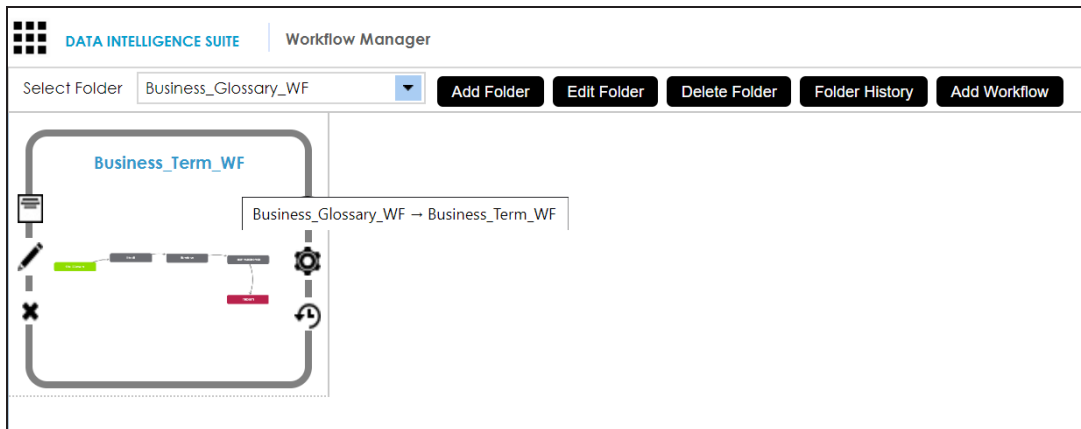
3. Click  .
The Edit Workflow page appears.
4. Click the **Folder** drop-down to choose a different folder for the workflow.
5. Update other necessary fields and click **Save**.
The workflow is updated.

Delete Workflows

To delete a workflow, follow these steps:

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

2. Hover over a workflow.



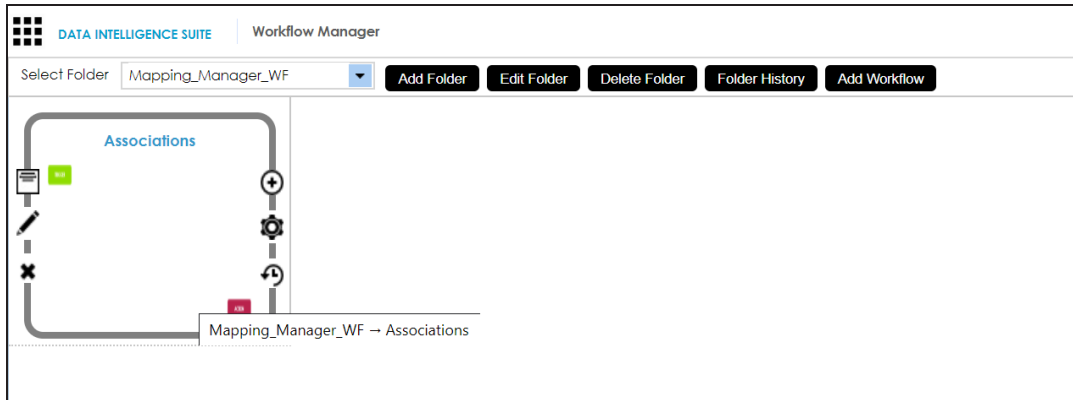
3. Click **X**.
A warning message appears.
4. Click **Yes**.
The workflow is deleted.

Configuring Workflows

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

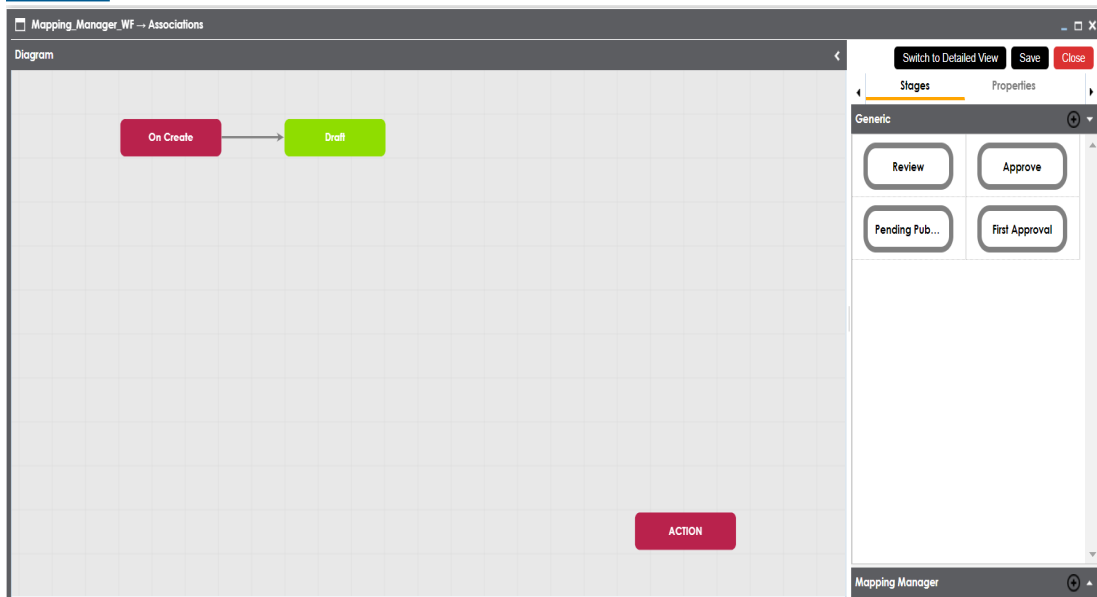
To configure a workflow, follow these steps:

1. In the **Workflow Manager** page, select a folder.
The workflow pane displays a list of workflows.
2. Hover over a workflow.



3. 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.



4. Click the **Stages** tab and click .

The Add Stage page appears.

Add Stage

Name *

Stage Name is a required field

Status title *

Status title is a required field

Description

Next Cancel

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

For example:

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

6. Click **Next**.

The following page appears.

Add Stage

Previous Save Cancel

Select Roles :

☐ Select All

- ☐ Administrator
- ☐ Business User
- ☐ ETL Developer
- ☐ Mapping Admin
- ☐ Mapping Designer
- ☐ Power User
- ☐ Project Admin
- ☐ public
- ☐ System Admin
- ☐ Tester
- ☐ Transformation Admin

7. Select applicable roles.

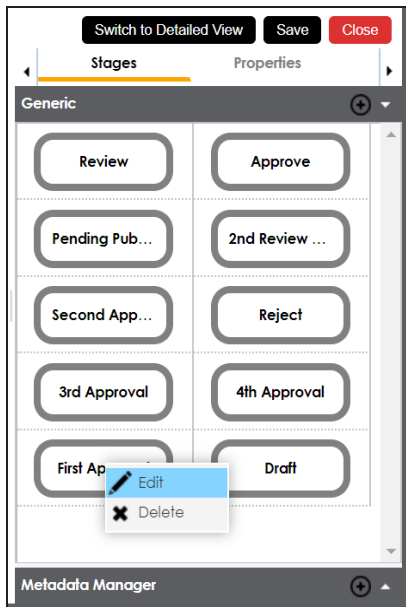
8. Click **Save**.

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

The stages can be updated as per your requirements. You can update stage name, description, and roles assigned to it.

To update stages, follow these steps:

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



2. Click **Edit**.

You can update the stage name and its description.

Edit Stage

Name *
First Approval
Stage Name is a required field

Status title *
Pending Final Approval
Status title is a required field

Description
[Rich text editor toolbar]

Association Mappings

Next Cancel

3. Click **Next**.

You can update the roles assigned to the stage.

Edit Stage

Previous Save Cancel

Select Roles :

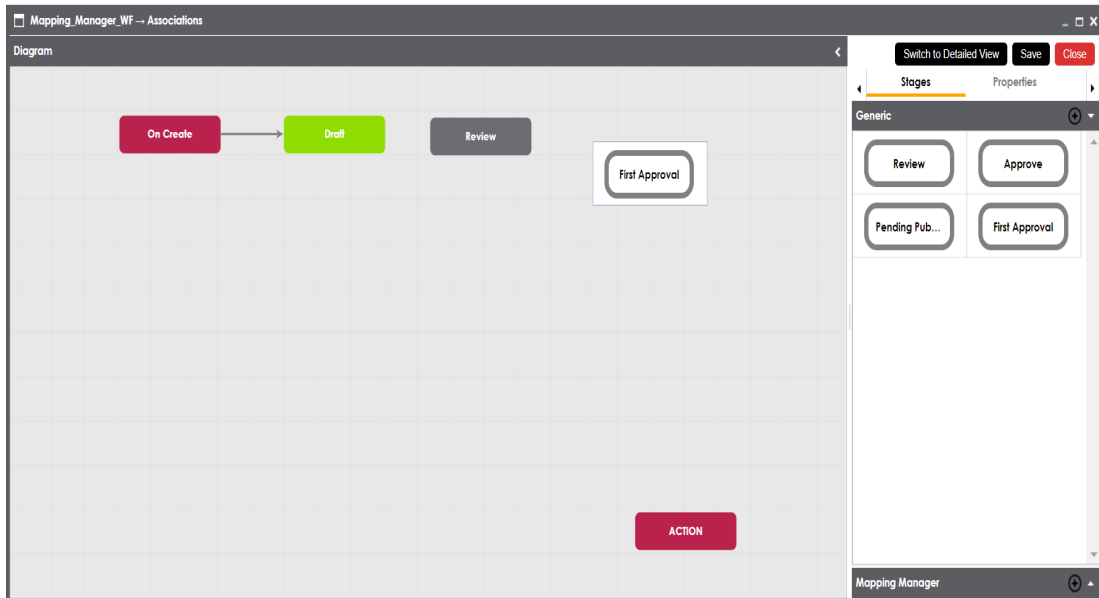
- ☐ Select All
- ☒ Administrator
- ☒ ETL Developer
- ☐ Mapping Admin
- ☐ Mapping Designer
- ☐ METADATA_READ
- ☐ New Role
- ☐ Power User
- ☐ Project Admin
- ☐ public
- ☐ R_Name
- ☐ R_Name1
- ☐ System Admin
- ☐ Tester
- ☐ Transformation Admin

4. Click **Save**.

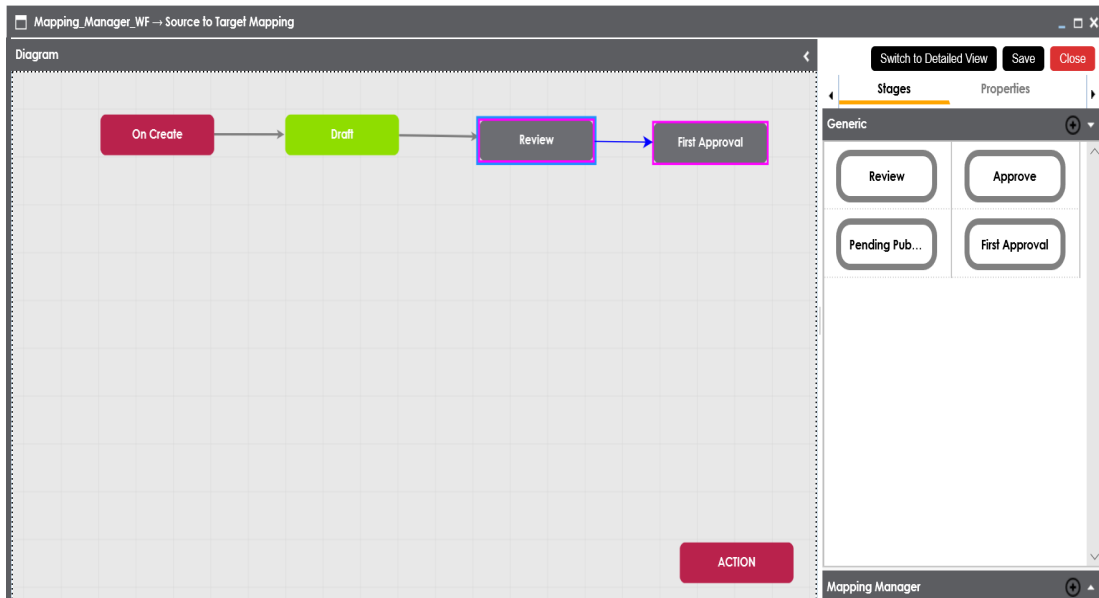
The stage is updated.

To add generic stages to workflows, follow these steps:

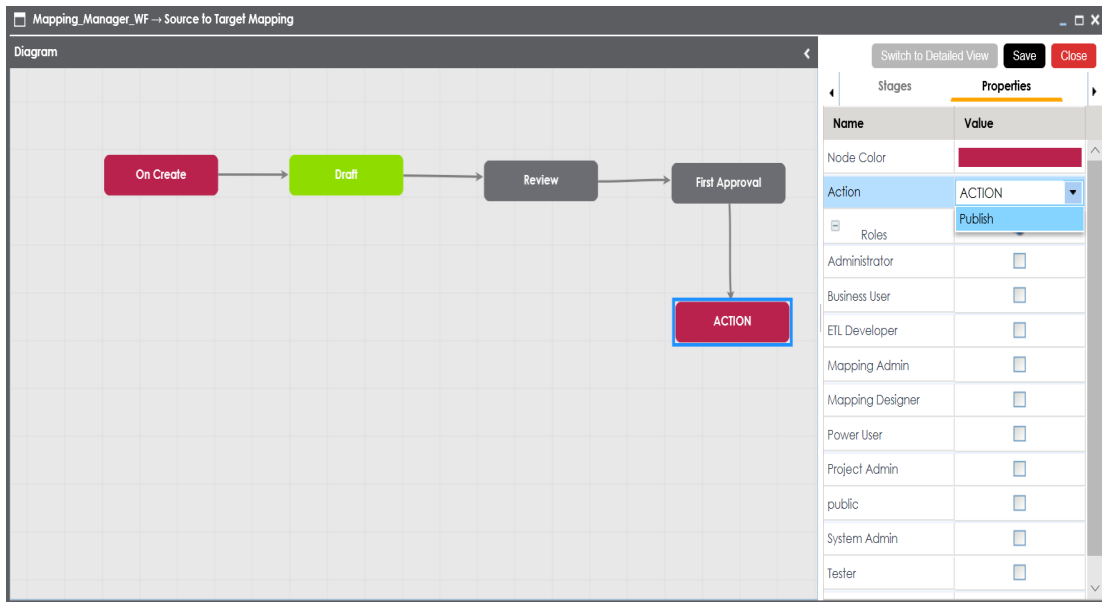
1. Drag and drop the stages from the **Generic** tab to the **Diagram** pane.



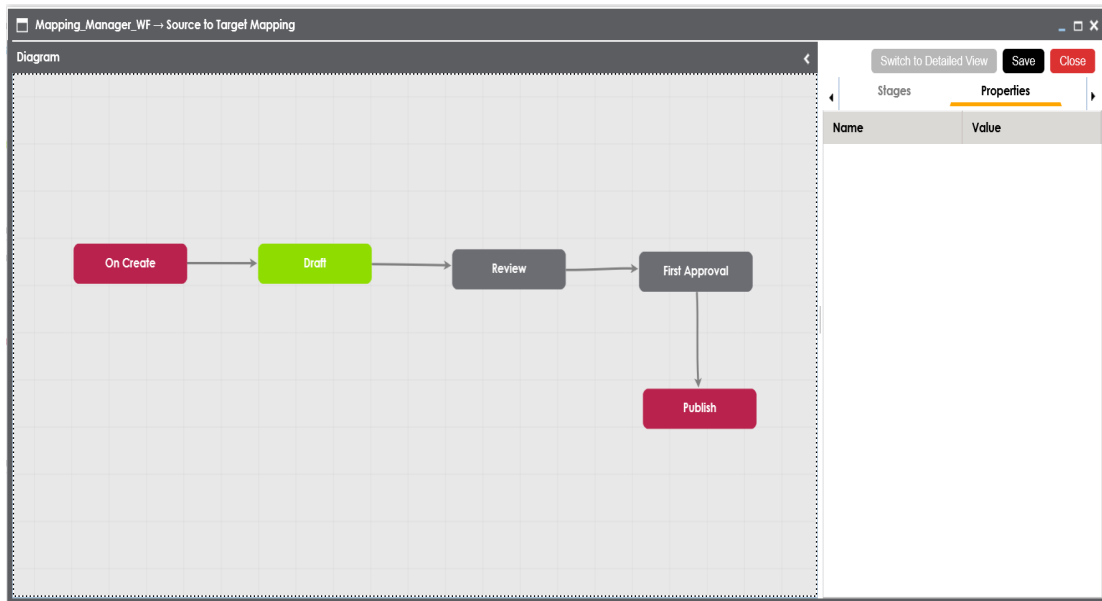
2. Drag the cursor from one stage to the next stage to connect the two stages.



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



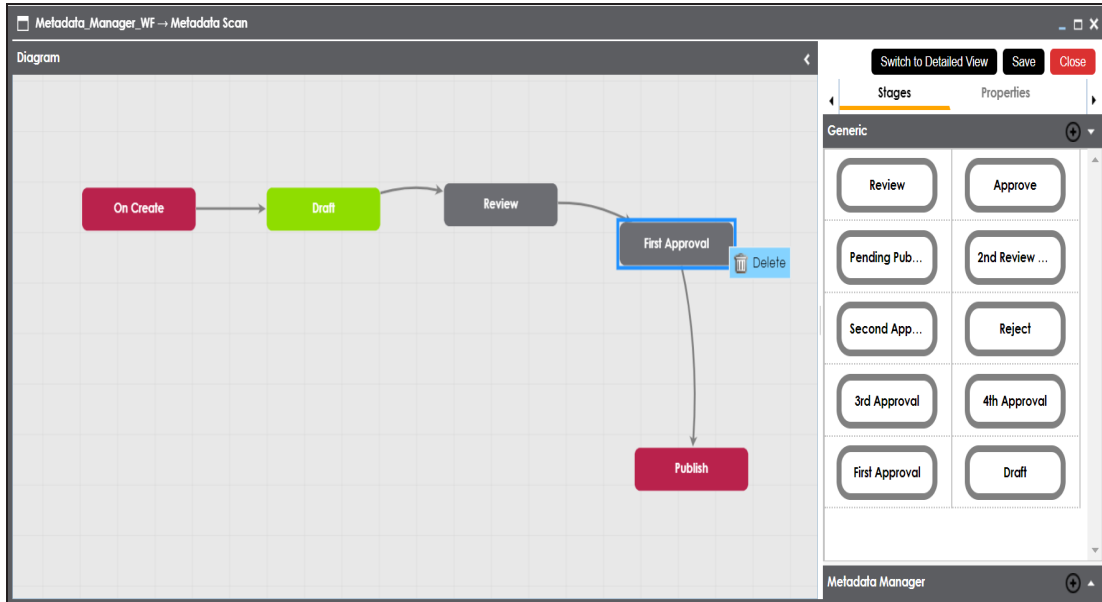
5. Select appropriate roles by selecting the appropriate check boxes.
6. Click **Save**.



The workflow is configured and saved.

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

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



2. Click **Delete**.

The stage is deleted from the workflow diagram.

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.

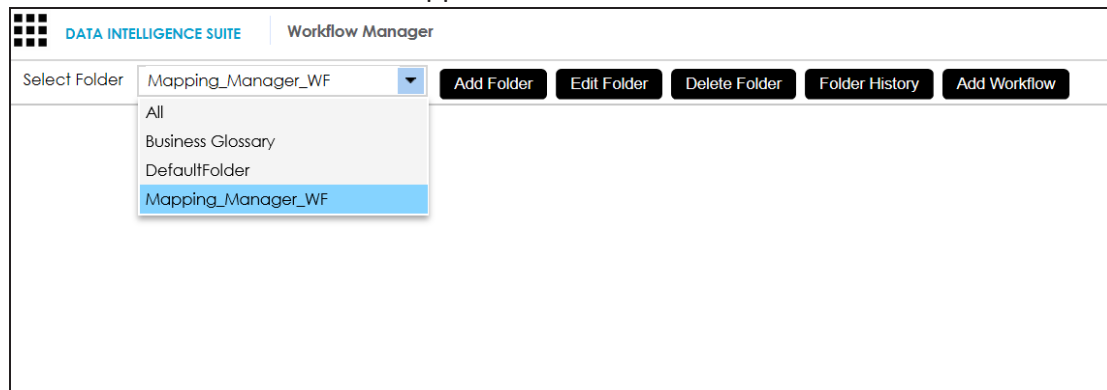
Before you assign workflows to a project:


- Ensure that you choose **Mapping Manager** as a module and an object as **Mapping** while adding the workflow to the folder.
- 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 override the default workflow.

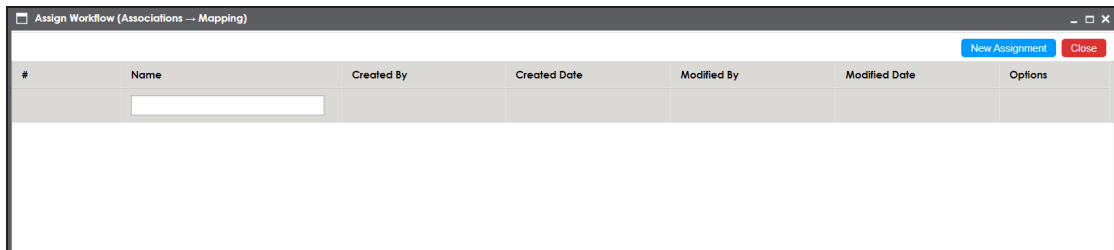
To assign workflows to projects, follow these steps:

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

All the workflows in the folder appears.

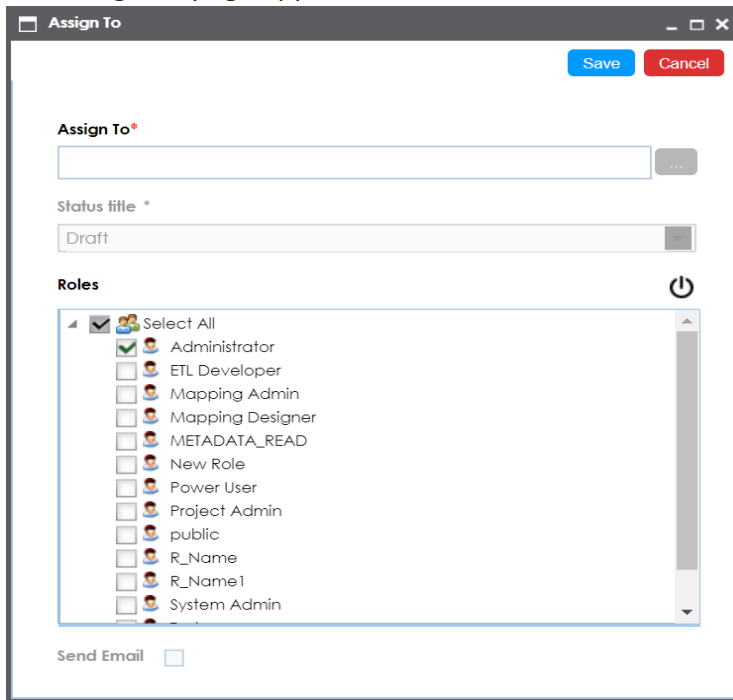


2. Hover over the required workflow, and click . The Assign Workflow page appears.



3. Click **New Assignment**.

The Assign To page appears.



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

The Assign Object page appears.



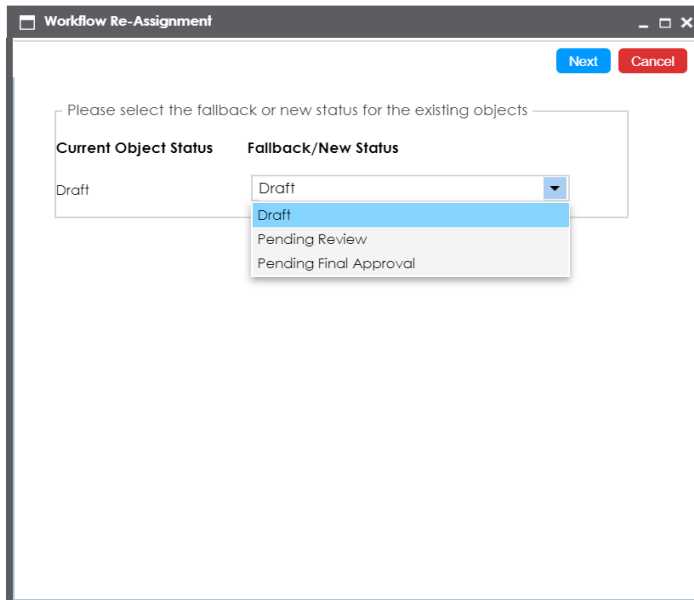
5. Select a project and click **Select**.

A warning page appears.

6. Click **Yes**.

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

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



Workflow Re-Assignment

Please select the fallback or new status for the existing objects

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

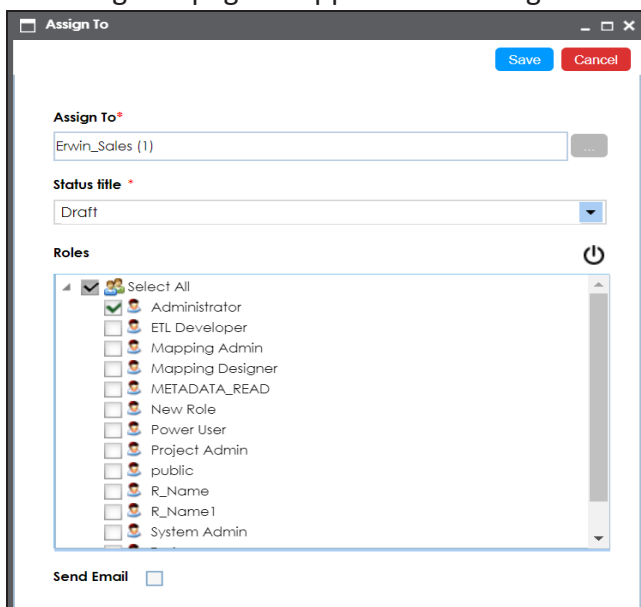
Next Cancel

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

8. Click **Next**.

9. Enter comments, and click .

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



Assign To

Save Cancel

Assign To*

Erwin_Sales (1)

Status title *

Draft

Roles

- ☒ Select All
- ☒ Administrator
- ☐ ETL Developer
- ☐ Mapping Admin
- ☐ Mapping Designer
- ☐ METADATA_READ
- ☐ New Role
- ☐ Power User
- ☐ Project Admin
- ☐ public
- ☐ R_Name
- ☐ R_Name1
- ☐ System Admin

Send Email ☐

10. Select an appropriate **Status Title** from which the workflow starts. The Status Titles corresponds to the stages of the workflow. Status title is assigned to a stage while creating a stage.
11. Select an appropriate **Roles**.
12. Select the **Send Email** check box to receive email notification from Admin Email ID. For more information on configuring Admin Email ID, refer to the [Configuring Email Settings](#) topic.
13. 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 following page appears.

DATA INTELLIGENCE SUITE Mapping Manager

Workspace Mappings

Project Summary

#	Project Name	Project Description	Project Owner	Subjects Count	Mapping Count	Created By	Created Date Time	Last Modified By	Last Modified Date Time
1	ERP			0	3	Administrator	2018-09-14 10:50:13.287	Administrator	2018-10-05 10:15:04.817
2	EDW			0	3	Administrator	2018-10-05 10:15:11.797	Administrator	2018-10-05 10:15:11.797
3	Sales Data Mart			0	8	Administrator	2018-10-05 10:15:26.093	Administrator	2018-10-05 10:15:26.093
4	BFSI Integration			0	1	Administrator	2018-10-05 10:15:36.237	Administrator	2018-10-05 10:15:36.237
5	Data Lake Migration			3	3	Administrator	2018-10-05 10:16:26.903	Administrator	2018-10-05 10:16:26.903
6	OBIEE			3	23	Administrator	2018-10-09 12:44:16.943	Administrator	2018-10-19 06:11:28.09
7	AdventureWorks_M			0	8	Administrator	2018-10-19 06:11:28.09	Administrator	2018-10-19 06:11:28.09
8	Carrefour			12	9	Administrator	2018-11-07 01:00:25.593	Administrator	2018-11-07 01:00:25.593
9	IQVIA			0	1	Administrator	2018-11-19 11:54:46.0	Administrator	2018-11-19 11:54:46.0
10	Exeter			0	2	Administrator	2018-12-04 11:30:53.793	Administrator	2018-12-04 11:30:53.793
11	BBT			0	1	Administrator	2018-12-21 06:54:27.687	Administrator	2019-08-16 23:00:00.000

Mapping Manager Dashboard

Published Mappings

2. Click .

3. Click **My Workflow Queue**.

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


My Workflow Queue

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

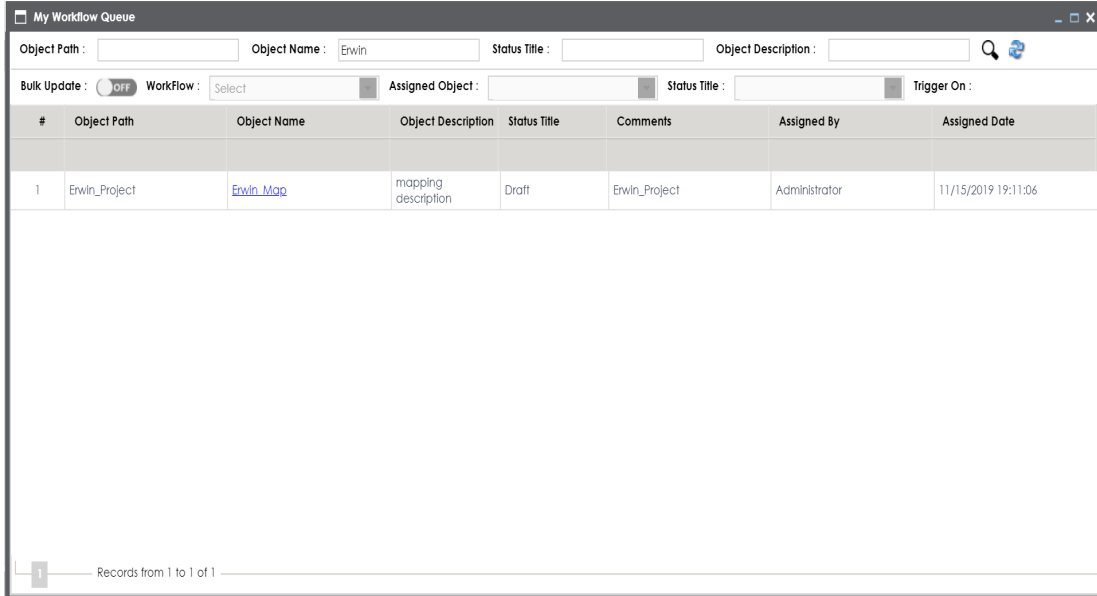
Bulk Update : OFF Workflow : Assigned Object : Status Title : Trigger On :

#	Object Path	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	ERP	SAP		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
3	ERP	SAP		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
5	Data Lake Migration/Data Lake To EDW	Load_Customers		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
7	Data Lake Migration/Data Lake To EDW	Load_Customers		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
9	Data Lake Migration/EDW To Reports	Load_Customer_Report		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
11	Data Lake Migration/EDW To Reports	Load_Customer_Report		Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
13	OBIEE/Pentaho Mappings	CAN New ARO by Prov Current Year	CAN New ARO by Prov Current Year	Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
15	OBIEE/Pentaho Mappings	CAN New ARO by Prov Current Year	CAN New ARO by Prov Current Year	Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
17	OBIEE/Pentaho Mappings	Can_warehouse_prodlst	can_warehouse_pro	Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58
19	OBIEE/Pentaho Mappings	Can_warehouse_prodlst	can_warehouse_pro	Draft	Object created and moved to draft	Administrator	07/01/2019 09:30:58

Records from 1 to 25 of 2800

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 appear.



The screenshot shows a web application window titled "My Workflow Queue". It features a search bar at the top with fields for "Object Path", "Object Name" (containing "Erwin"), "Status Title", and "Object Description". Below the search bar are controls for "Bulk Update" (set to OFF), "Workflow" (set to Select), "Assigned Object", "Status Title", and "Trigger On". The main area contains a table with the following data:

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

At the bottom left, there is a pagination control showing "1" and the text "Records from 1 to 1 of 1".

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

The Map View page appears and the user can examine the map.

Map View

Map Spec Overview | Map Spec Grid | Source Extract Sql | Target Update Strategy | Testing Notes | Map Spec Docs | Assignments | Specification Artifacts | Level Of Effort | Cha

Map Id: 2 | Workflow Status: Draft

Specification Name: Erwin_Map

Map Specification Version: 1.01

Version Label:

State Name: In Progress | Sub State Name:

Sync Source Metadata: OFF | Sync Target Metadata: OFF

Job Name XRef:

Mapping Description:

[Send To - Review](#)

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

The Workflow Change Description page appears.

Workflow Change Description

Comments

Enter Change Description comments here

[Save & Send](#)

- 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.

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

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

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

Managing Metadata Manager Workflows

You can create metadata manager workflows for three objects:

- Environments
- Tables
- Columns

Creating and configuring metadata manager workflows involves:

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

After configuring generic workflows, you can:

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

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

Execution of metadata manager workflows via workflow queue involves:

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

Assigning Workflows to Environments

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

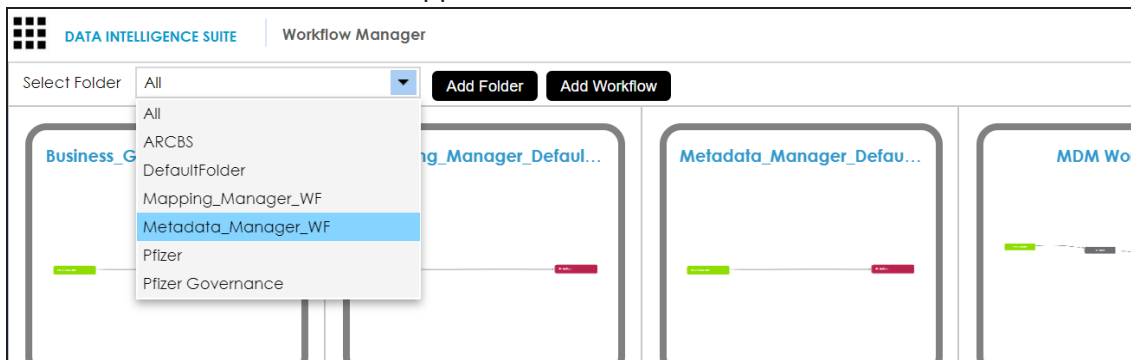
Before you assign workflows to an environment:

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

To assign workflows to environments, follow these steps:

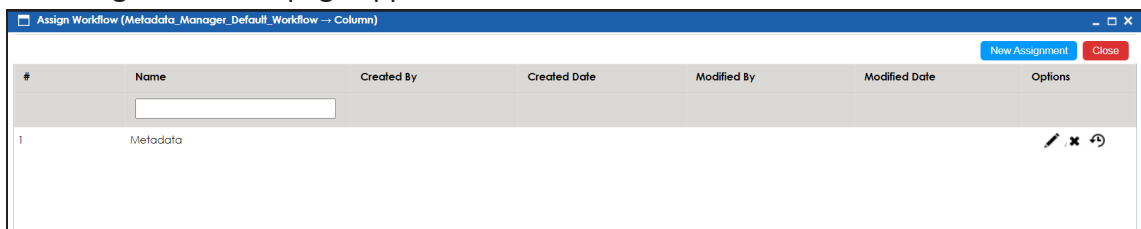
1. In the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



2. Hover over a workflow and click .

The Assign Workflow page appears.



3. Click **New Assignment**.

The Assign To page appears.

Assign To

Save Cancel

Assign To*

Status title *

Preliminary Draft

Roles

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

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

The Assign Object page appears.

Assign Object

Select Cancel

- Metadata
 - 3rd Party Flat Files
 - A_System
 - AdventureWorks
 - AMERISURE
 - Atlas Sales System
 - B_System
 - BI
 - BO Reports
 - Customer Order Entry
 - Data Lake
 - Data Models
 - EDW
 - erwinDIS
 - JDEdwards
 - MANTA
 - Nasdaq Data Asset Register
 - New_Erwin
 - New_System
 - ODS
 - PeopleSoft
 - Salesforce
 - SAP
 - Scotia

5. Select a system.

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

6. Click **Select**.

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

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

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

8. Select an appropriate **Roles**.
9. Select the **Send Email** check box to receive an email notification.
10. Click **Save**.

The workflow is assigned to the system.

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

Executing Workflows for Environments

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

Executing workflows involves:

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

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

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

The following page appears.

DATA INTELLIGENCE SUITE

Metadata Manager

Search

System Catalogue

Sensitive Data

Metadata

erwinDIS

Metadata Summary

Data Dictionary

Configure Extended Properties

Scheduled Jobs

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

Records from 1 to 1

Page 1


25 rows per page

2. Click .

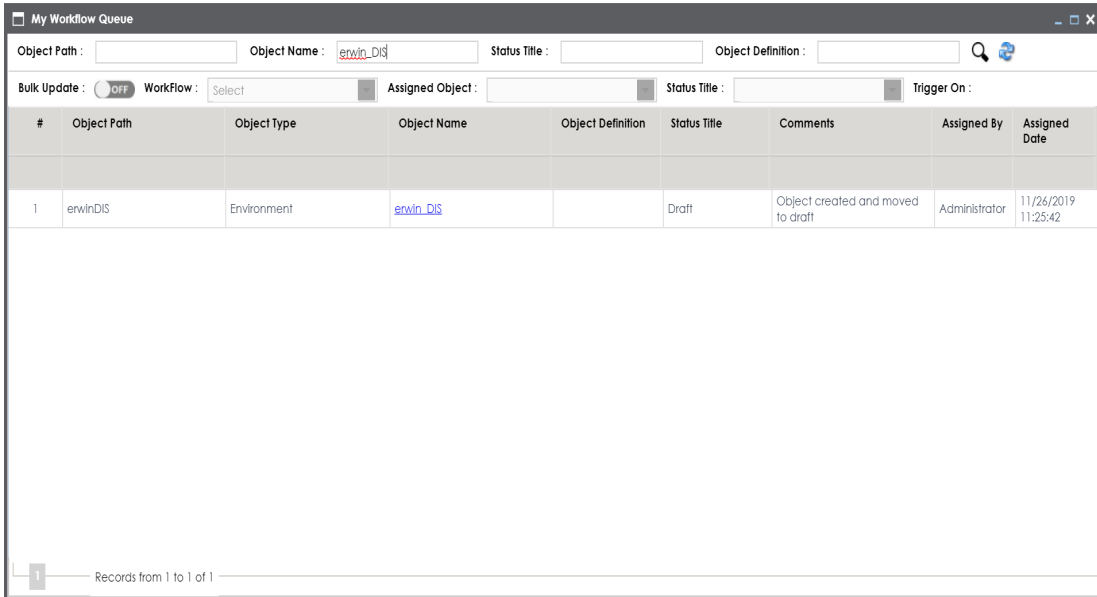
3. Click **My Workflow Queue**.

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

My Workflow Queue								
Object Path :		Object Name :		Status Title :		Object Definition :		
Bulk Update : <input type="checkbox"/> OFF		Workflow : <input type="text" value="Select"/>		Assigned Object :		Status Title :		
#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwinDIS	Environment	erwin_DIS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:42
2	erwinDIS/erwin_DIS	Table	dbo.ADS_ASSOCIATIONS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
3	erwinDIS/erwin_DIS	Table	dbo.ADS_FORM		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
4	erwinDIS/erwin_DIS	Table	dbo.ADS_KEY_VALUE		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
5	erwinDIS/erwin_DIS	Table	dbo.ADS_KEY_VALUE_OBJECTS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
6	erwinDIS/erwin_DIS	Table	dbo.ADS_MM_VERSION		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
7	erwinDIS/erwin_DIS	Table	dbo.ADS_MODULES		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
8	erwinDIS/erwin_DIS	Table	dbo.ADS_OBJECT_CODESETS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
9	erwinDIS/erwin_DIS	Table	dbo.ADS_OBJECT_TO_OBJECT		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:57
Records from 1 to 25 of 441								

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

The search results are displayed.



The screenshot shows a web application window titled "My Workflow Queue". It features a search bar at the top with fields for "Object Path", "Object Name" (containing "erwinDIS"), "Status Title", and "Object Definition". Below the search bar are filters for "Bulk Update" (set to OFF), "Workflow" (set to Select), "Assigned Object", "Status Title", and "Trigger On". The main area contains a table with the following data:

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

At the bottom left, there is a pagination control showing "Records from 1 to 1 of 1".

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

The Environment View page appears.

Environment View

Environment Details Extended Properties

Configuration Details Miscellaneous

Status: Draft

System Environment Name*: erwin_DIS

System Environment Type*: Production

Data Steward: -Select Data Steward-

Server Platform: ☐ Apply To All Tables & Columns

Server OS Version:

File Management Type:

File Location:

Production System Name: Choose Production System

Production Environment Name:

Version: 1.00

Version Label:

Driver Name*: com.microsoft.sqlserver.jdbc.SQLServe

DBMS Name/DSN*: erwinDG10_GA11

IP Address/Host Name*: localhost

Port: 1433

User Name*: sa

Password*:

☒ Save Password

Urf*:

DBMS Instance Schema: DBO

Connection Pool Type*: Hikaricp

Number of Partitions*: 2

Minimum Connections Per Partitions*: 1

Send To - Review

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

Workflow Change Description

Comments*

Enter Change Description comments here

Save & Send

- 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.

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

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

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

Assigning Workflows to Tables

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

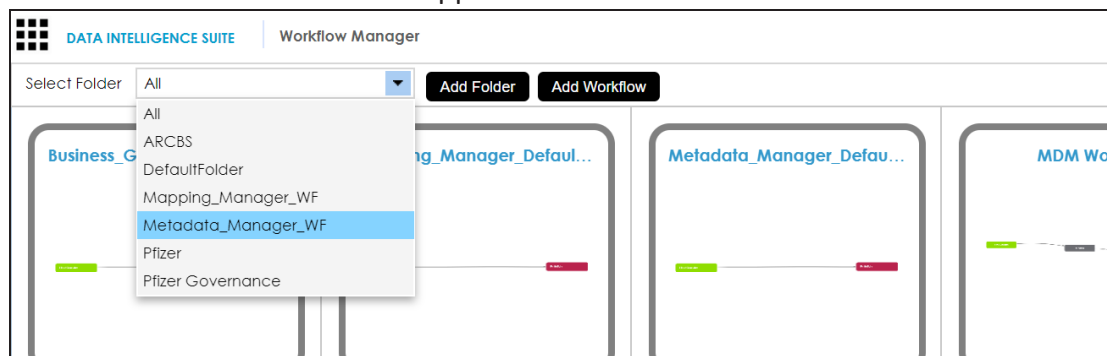
Before you assign workflows to tables:

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

To assign workflows to tables, follow these steps:

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

All the workflows in the folders appear.



2. Hover over a workflow, and click .

The Assign Workflow page appears.

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

3. Click **New Assignment**.

The Assign To page appears.

Assign To

Save Cancel

Assign To*

...

Status title *

...

Roles

☒

Select All

☒

Administrator

☐

ETL Developer

☐

Mapping Admin

☐

Mapping Designer

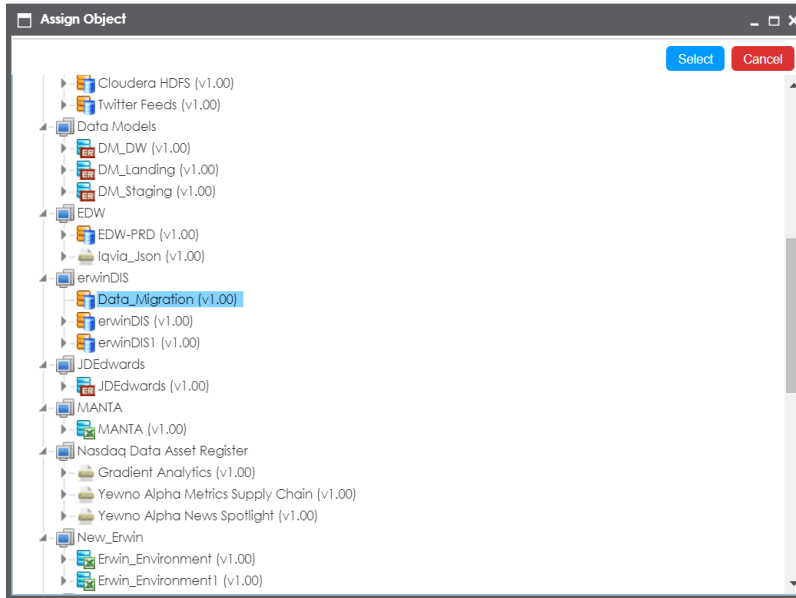
☐

Power User

⏻

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

The Assign Object page appears.



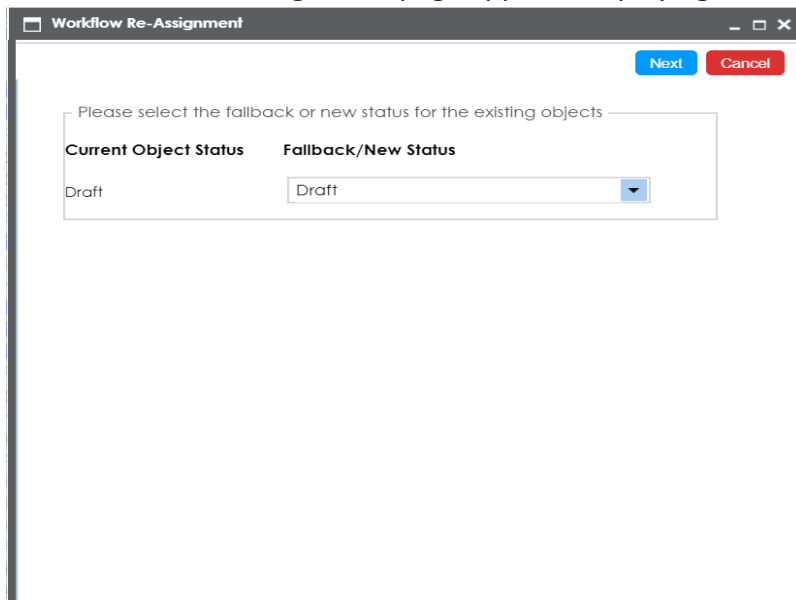
5. Click an Environment containing with required table.

6. Click **Select**.

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

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

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



8. Select the appropriate Fallback/New Status.

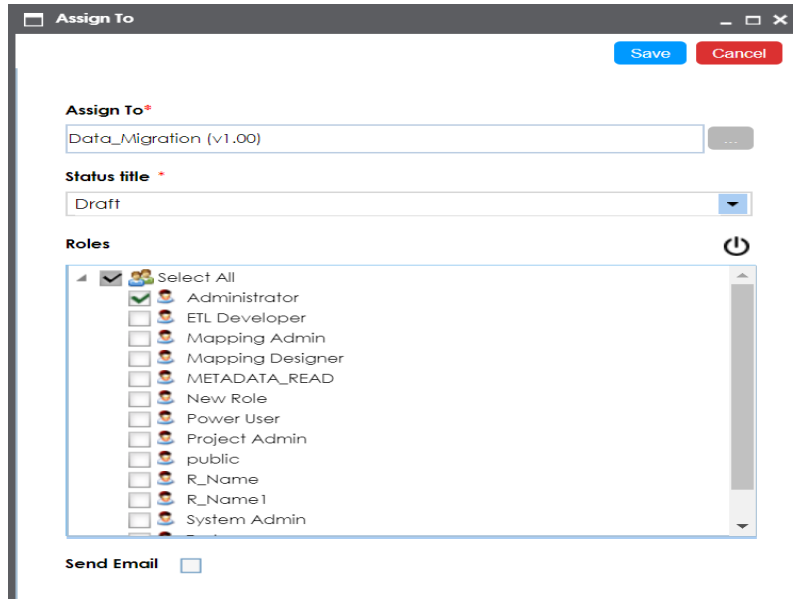
The options for Fallback/New Status depends on the [stages defined in the workflow](#).

9. Click **Next**.

The Comments page appears.

10. Enter relevant comments, and click .

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



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

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

12. Select the appropriate **Roles**.

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

14. Click **Save**.

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

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

Executing Workflows for Tables

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

Executing workflows involves:

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

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

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

The following page appears.

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

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

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


My Workflow Queue

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

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

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

Records from 1 to 25 of 441

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

The search results are displayed.

My Workflow Queue

Object Path : Object Name : [dbo.ADS_ASSOCIATIONS](#) Status Title : Object Definition :

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

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

Records from 1 to 1 of 1

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

The Table View page appears.

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

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

The Workflow Change Description page appears.

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

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

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

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

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

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

Assigning Workflows to the Columns

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

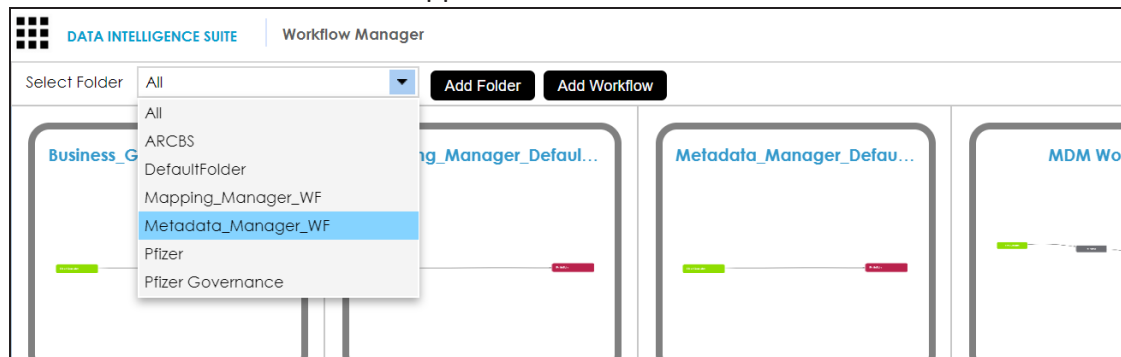
Before you assign workflows to columns:

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

To assign workflows to columns, follow these steps:

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

All the workflows in the folder appear.



2. Hover over the required workflow and click .

The Assign Workflow page appears.

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

3. Click **New Assignment**.

The Assign To page appears.

Assign To

Save Cancel

Assign To*

Status title *

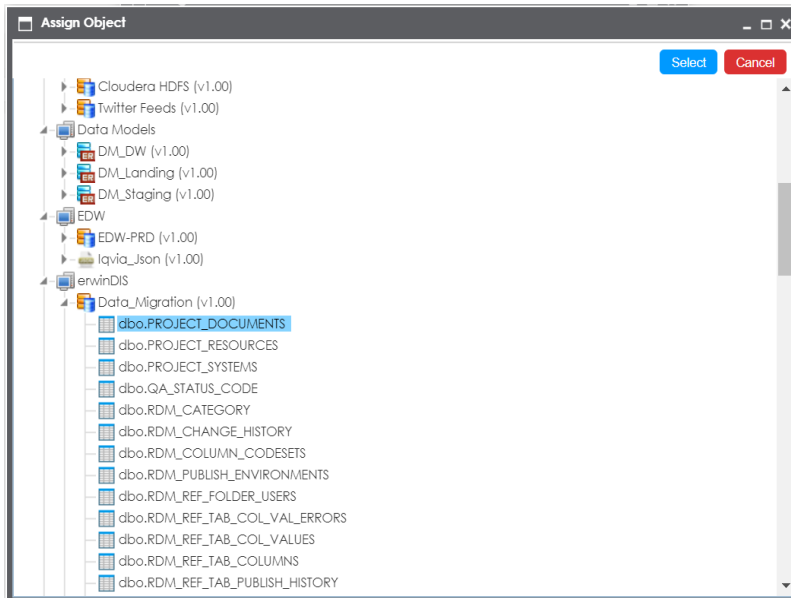
Preliminary Draft

Roles

☒ Select All
☒ Administrator
☐ ETL Developer
☐ Mapping Admin
☐ Mapping Designer
☐ Power User

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

The Assign Object page appears.

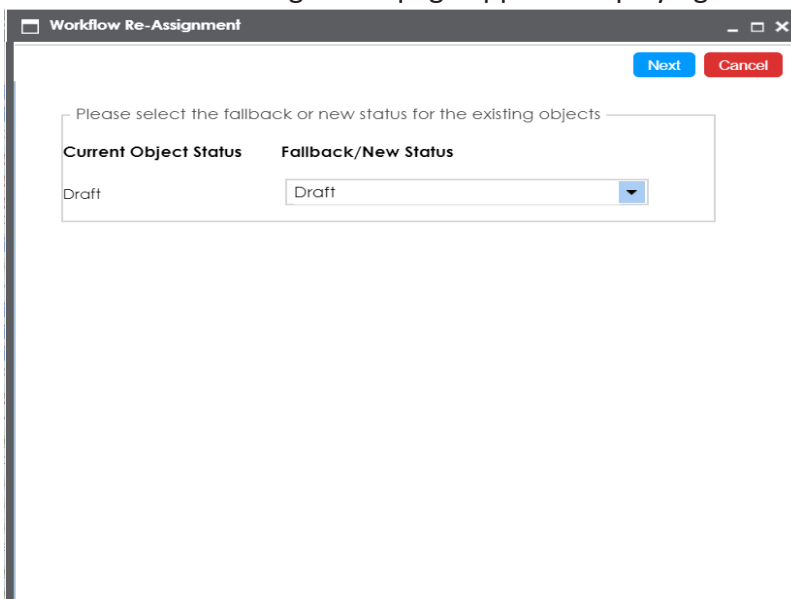


5. Select a table with necessary columns and click **Select**.

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

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

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



7. Select the appropriate Fallback/New Status.

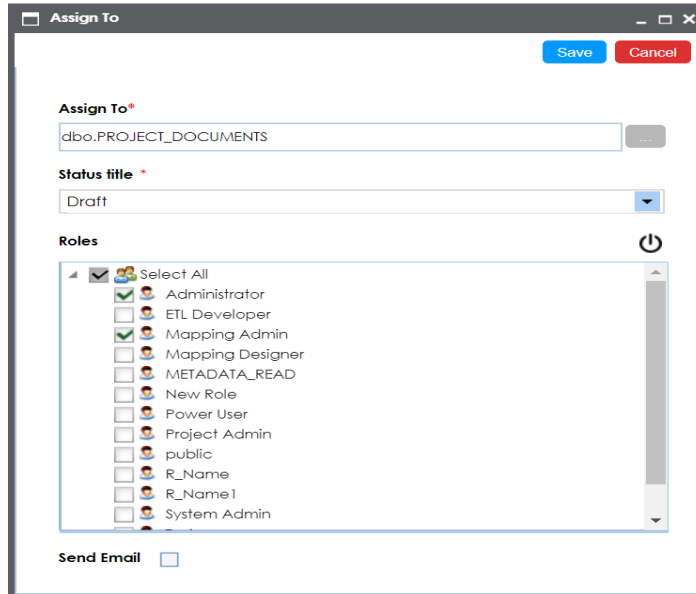
The options for Fallback/New Status depends on the [stages defined in the workflow](#).

8. Click **Next**.

The Comments page appears.

9. Enter relevant comments, and click .

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



The image shows a dialog box titled "Assign To" with a "Save" button and a "Cancel" button. It contains the following fields and controls:

- Assign To***: A text input field containing "dbo.PROJECT_DOCUMENTS" and a dropdown arrow.
- Status title ***: A dropdown menu showing "Draft".
- Roles**: A list box with a "Select All" button and a power icon. The list includes:
 - ☒ Select All
 - ☒ Administrator
 - ☐ ETL Developer
 - ☒ Mapping Admin
 - ☐ Mapping Designer
 - ☐ METADATA_READ
 - ☐ New Role
 - ☐ Power User
 - ☐ Project Admin
 - ☐ public
 - ☐ R_Name
 - ☐ R_Name1
 - ☐ System Admin
- Send Email**: A checkbox that is currently unchecked.

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

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

11. Select the appropriate **Roles**.

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

13. Click **Save**.

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

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

Executing Workflows for Columns

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

Executing workflows involves:

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

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

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


The following page appears.

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

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

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


My Workflow Queue

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

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


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

Records from 1 to 25 of 441

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

The search results are displayed.

My Workflow Queue

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

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

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

Records from 1 to 25 of 108

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

The Column View page appears.

The screenshot shows a 'Column View' window with two tabs: 'Column Properties' (active) and 'Extended Properties'. The 'Column Properties' tab is divided into 'Technical Properties' and 'Business Properties'. The 'Technical Properties' section contains the following fields:

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

The 'Business Properties' section is partially visible at the bottom. A 'Send To - Review' button is located in the top right corner.

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

The Workflow Change Description page appears.

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

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

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

Note: 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.

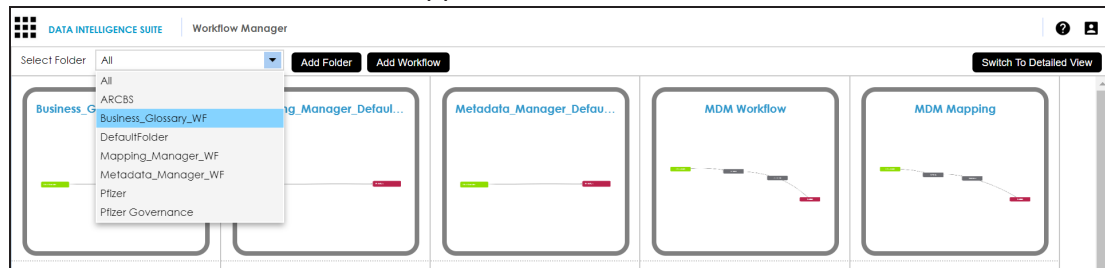
Before you assign workflows to business terms:

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

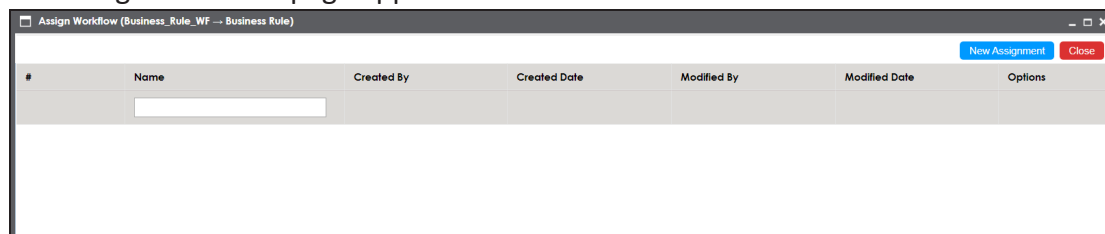
1. In the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



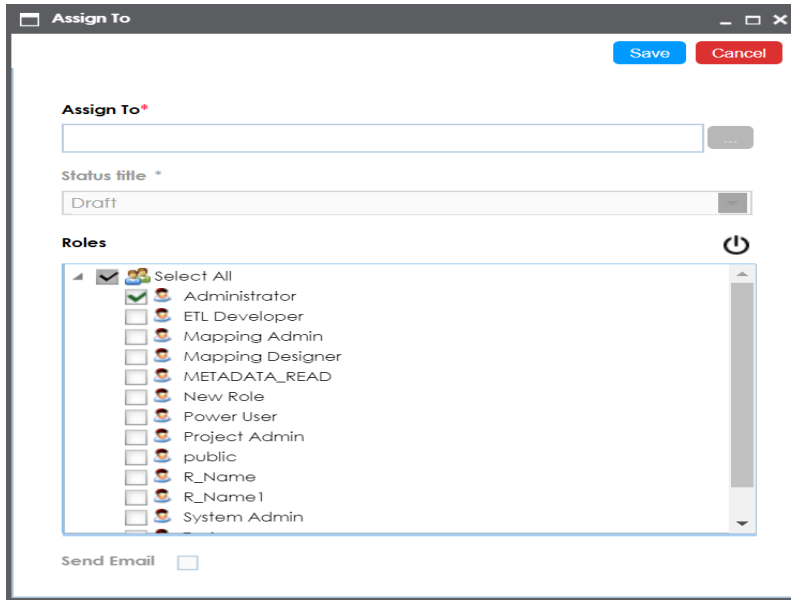
2. Hover over a workflow and click .

The Assign Workflow page appears.



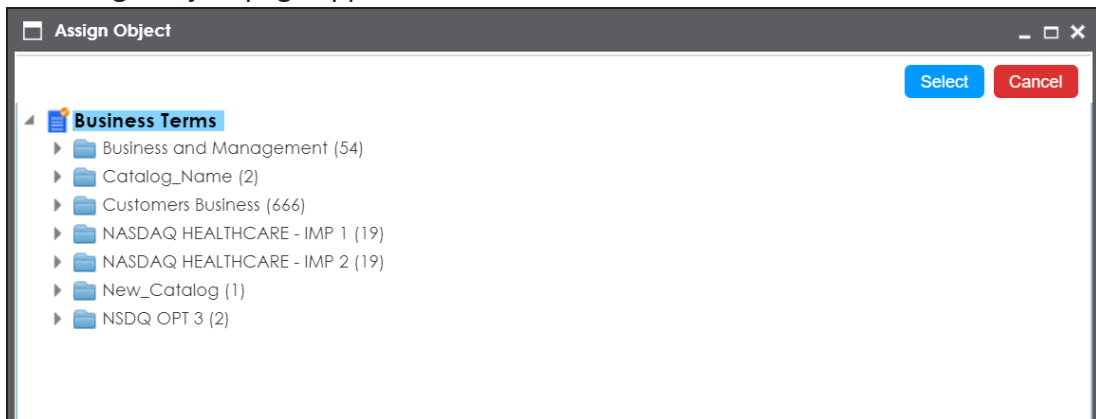
3. Click **New Assignment**.

The Assign To page appears.



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

The Assign Object page appears.

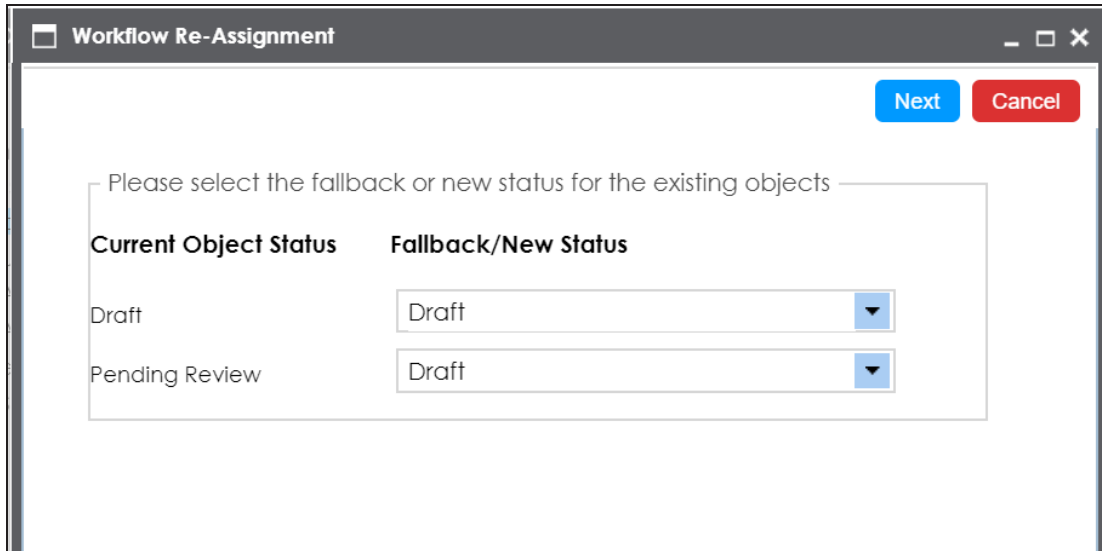


5. Select a catalog with business term to be assigned, and click **Select**.

A warning message appears.

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

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



Workflow Re-Assignment

Next Cancel

Please select the fallback or new status for the existing objects

Current Object Status	Fallback/New Status
Draft	<input type="text" value="Draft"/>
Pending Review	<input type="text" value="Draft"/>

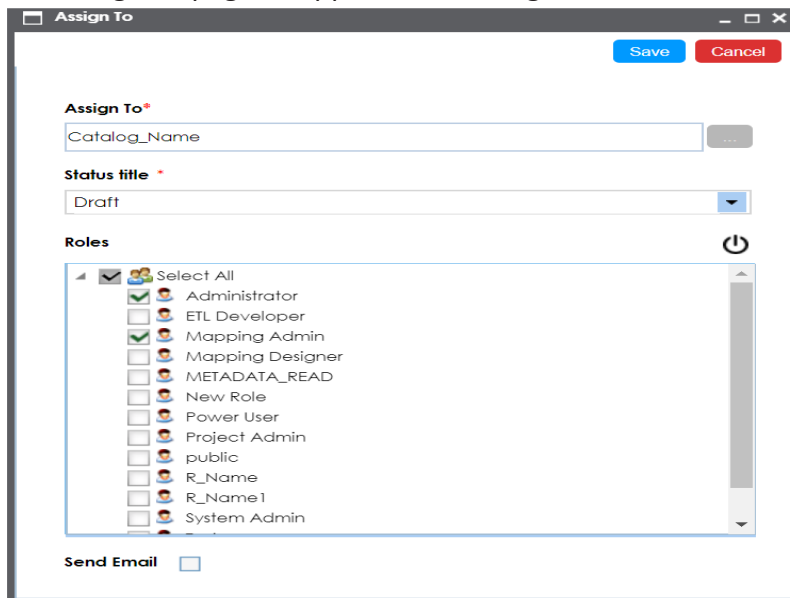
7. Select an appropriate **Fallback/New Status**.

8. Click **Next**.

The Comments page appear.

9. Enter relevant comments, and click .

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



Assign To

Save Cancel

Assign To*

Status title *

Roles

☒ Select All

- ☒ Administrator
- ☐ ETL Developer
- ☒ Mapping Admin
- ☐ Mapping Designer
- ☐ METADATA_READ
- ☐ New Role
- ☐ Power User
- ☐ Project Admin
- ☐ public
- ☐ R_Name
- ☐ R_Name1
- ☐ System Admin

Send Email ☐

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

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

11. Select an appropriate **Roles**.

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

13. Click **Save**.

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

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

Executing Workflows for Business Terms

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

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

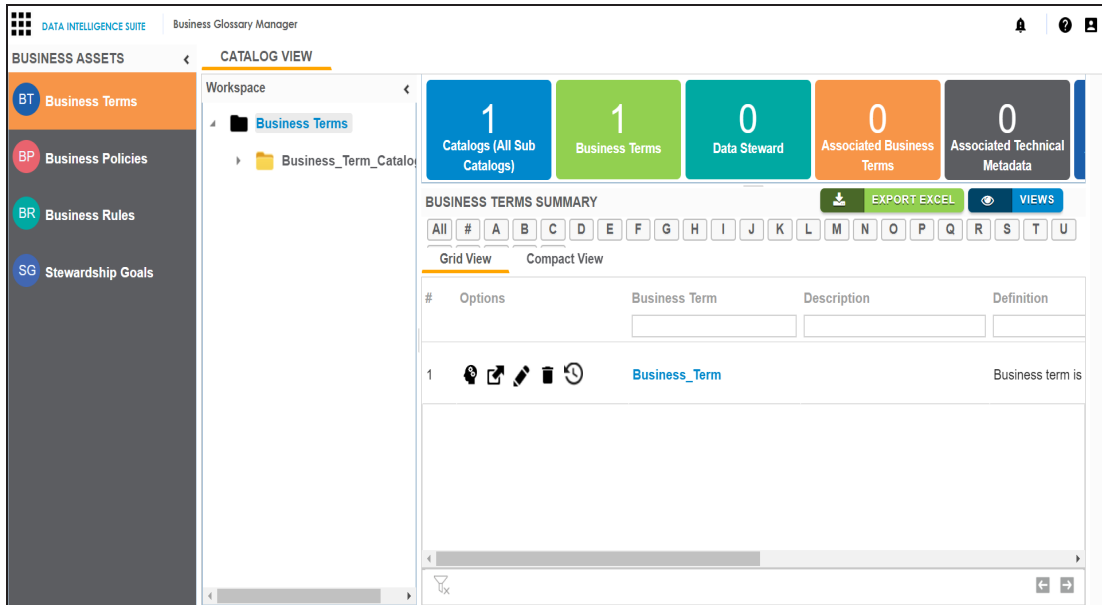
Executing workflows involves:

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

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

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


The following page appears.



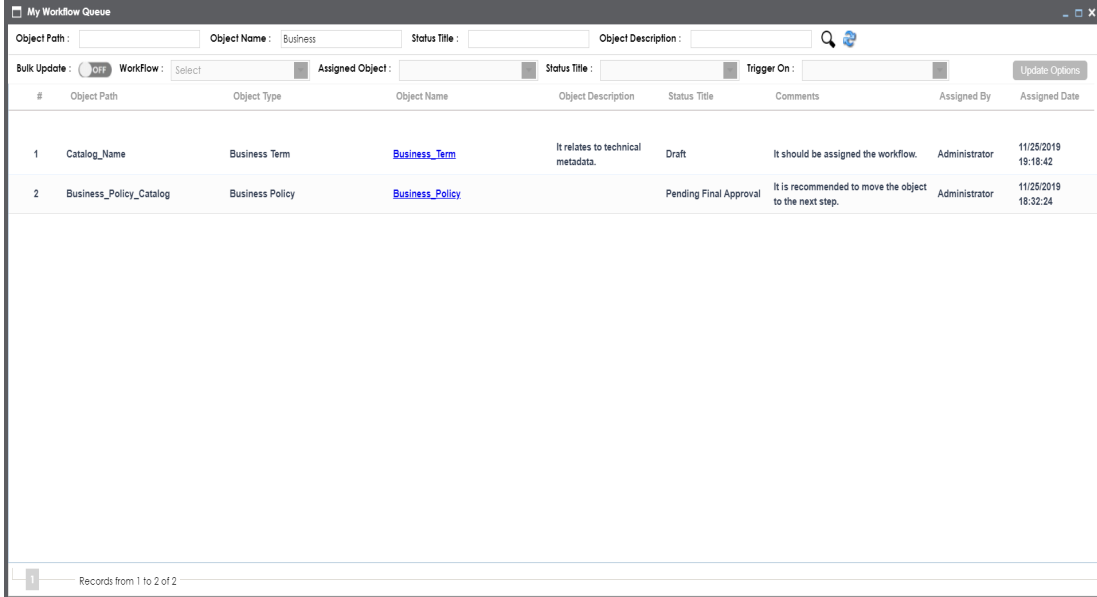
2. Click .
3. Click **My Workflow Queue**.

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

My Workflow Queue							
Object Path :		Object Name :		Status Title :		Object Description :	
Bulk Update : <input type="checkbox"/> Off		Workflow : <input type="text" value="Select"/>		Assigned Object :		Status Title :	
						Trigger On :	
#	Object Path	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Customers Business/Customers Business As Is/Information/Customer Management	3rd Party Preference Option Code		Draft	(System Generated) Business Term updated.	Administrator	11/05/2019 14:38:01
18	Customers Business/Customers Business As Is/Information/Account Management	Access Group		Draft	(System Generated) Business Term updated.	Administrator	08/22/2019 11:59:17
20	Customers Business/Customers Business As Is/Information/Account Management	Account		Draft	Object created and moved to draft	Administrator	07/01/2019 09:31:13
21	Customers Business/Customers Business As Is/Information/Account Management	Account		Draft	Object created and moved to draft	Administrator	07/01/2019 09:31:13
22	Customers Business/Customers Business As Is/Information/Account Management	Account Category		Draft	Object created and moved to draft	Administrator	07/01/2019 09:31:13
23	Customers Business/Customers Business As Is/Information/Account Management	Account Category		Draft	Object created and moved to draft	Administrator	07/01/2019 09:31:13

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 result appears.



The screenshot shows a web application window titled "My Workflow Queue". It features a search bar at the top with fields for "Object Path", "Object Name" (containing "Business"), "Status Title", and "Object Description". Below the search bar are filters for "Bulk Update" (set to "Off"), "Workflow" (set to "Select"), "Assigned Object", "Status Title", and "Trigger On". A table below displays the search results. The table has columns: #, Object Path, Object Type, Object Name, Object Description, Status Title, Comments, Assigned By, and Assigned Date. Two records are shown. The first record has "Catalog_Name" as the Object Path, "Business Term" as the Object Type, and "Business_Term" as the Object Name (a hyperlink). The second record has "Business_Policy_Catalog" as the Object Path, "Business Policy" as the Object Type, and "Business_Policy" as the Object Name (a hyperlink). The status of the first record is "Draft" and the second is "Pending Final Approval".

#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Catalog_Name	Business Term	Business_Term	It relates to technical metadata.	Draft	It should be assigned the workflow.	Administrator	11/29/2019 19:18:42
2	Business_Policy_Catalog	Business Policy	Business_Policy		Pending Final Approval	It is recommended to move the object to the next step.	Administrator	11/29/2019 18:32:24

Records from 1 to 2 of 2

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

The Edit Business Term page appears and the user can examine the business term.

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

The Workflow Change Description page appears.

7. Enter change description comments.

8. Click **Save & Send**.

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

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

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

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

Assigning Workflows to Business Rules

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

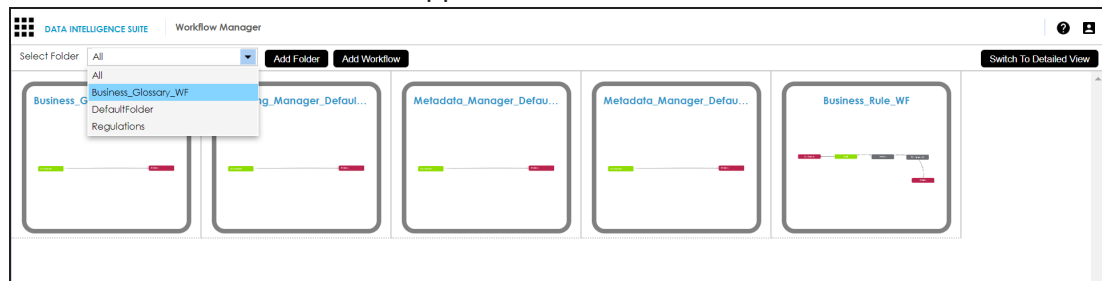
Before you assign workflows to business rules:

- Ensure that you choose **Business Glossary Manager** as a module and **Business Rule** while adding the workflow to the folder.
- Ensure that you assign the workflow to the business rule catalog before creating the business rule.
- 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. In the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



2. Hover over a workflow and click .

The Assign Workflow page appears.

Assign Workflow (Business_Rule_WF → Business Rule)

[New Assignment](#) [Close](#)

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

3. Click **New Assignment**.

The Assign To page appears.

Assign To

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

Assign To*

Status title *

Draft

Roles

☒ Select All

- ☒ Administrator
- ☐ ETL Developer
- ☒ Mapping Admin
- ☐ Mapping Designer
- ☐ Power User
- ☐ Project Admin
- ☐ public
- ☐ System Admin
- ☐ Tester
- ☐ Transformation Admin

Send Email ☐

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

The Assign Object page appears.

Assign Object

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

- Business Rules
 - Business_Rule_Catalog (1)

5. Select a catalog with business rule to be assigned, and click **Select**.
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 the title bar, there is a text field labeled "Assign To*" containing "Business_Rule_Catalog" and a small "..." button to its right. Below this is a dropdown menu labeled "Status title*" with "Draft" selected. Underneath 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", "ETL Developer", "Mapping Admin" (checked), "Mapping Designer", "Power User", "Project Admin", "public", "System Admin", "Tester", and "Transformation Admin". At the bottom left is a "Send Email" checkbox, which is currently unchecked.

6. Select an appropriate **Status Title** from which the workflow starts.
A Status Title is assigned to a stage while creating the stage.
7. Select an appropriate **Roles**.
8. Select the **Send Email** check box to receive email notification.
9. Click **Save**.

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

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

Executing Workflows for Business Rules

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

rules created under it.

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

Executing workflows involves:

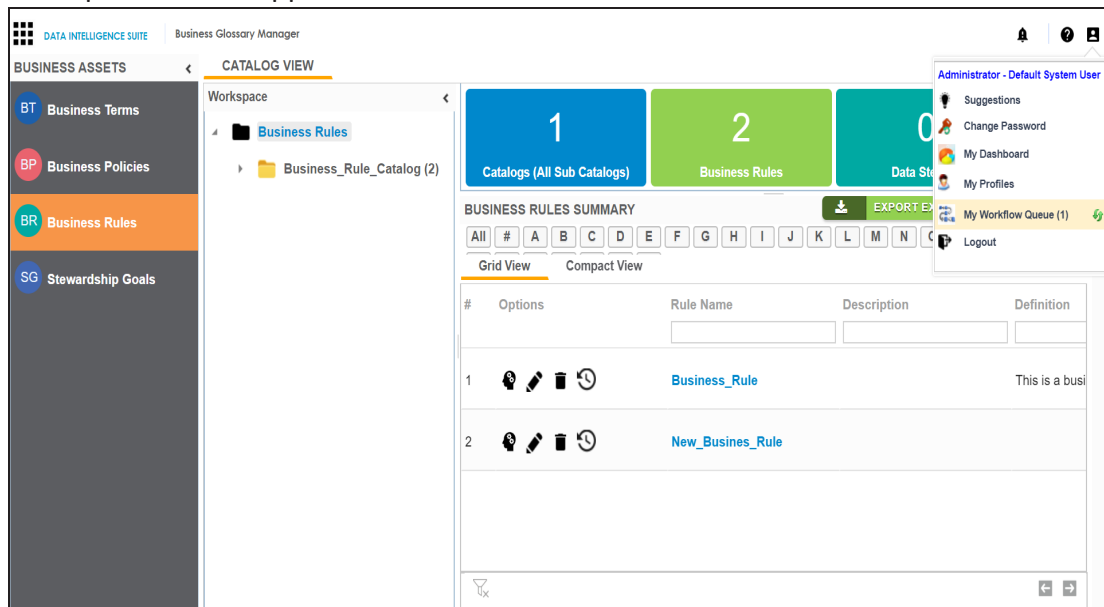
1. Receiving workflow queue notifications
2. Examining and moving the business rules to the next stage

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

To execute workflows for business rules, follow these steps:


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

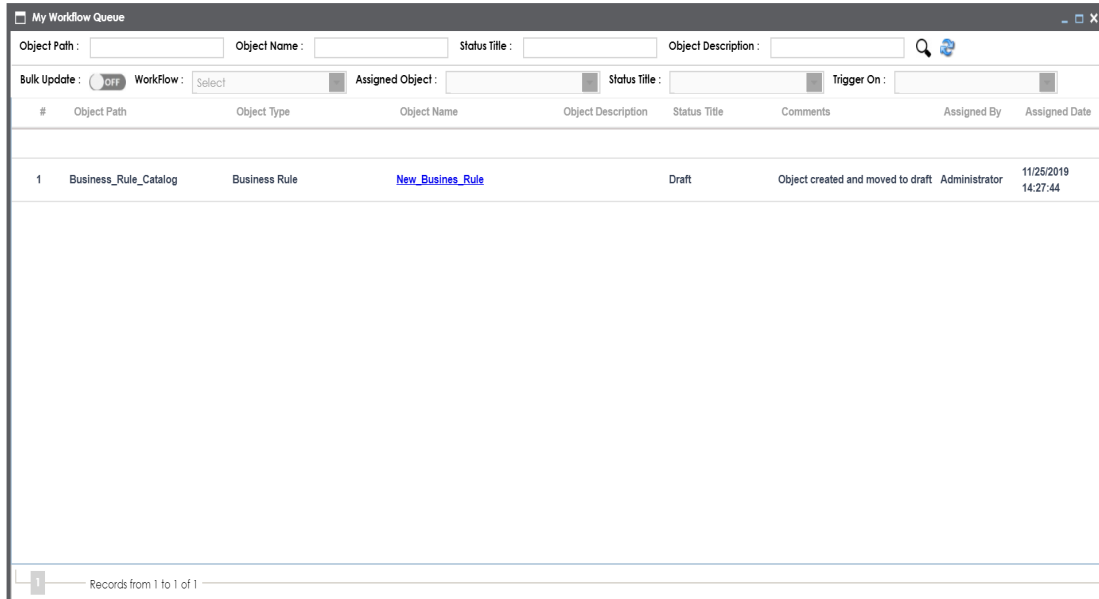
The Options menu appears.



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 .



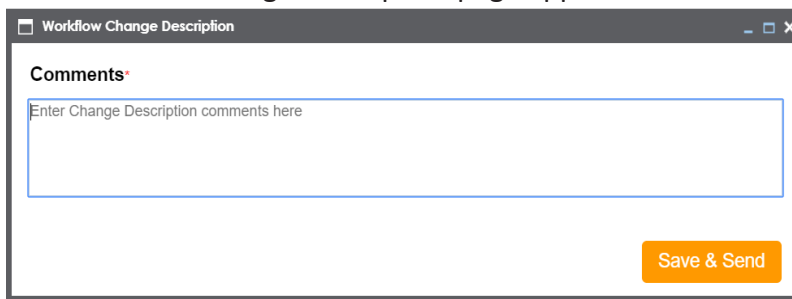
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Business_Rule_Catalog	Business Rule	New_Business_Rule		Draft	Object created and moved to draft	Administrator	11/25/2019 14:27:44

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

The Business Rule View page appears and the user can examine the business rule.

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

The Workflow Change Description page appears.



- Enter change description comments.

- Click **Save & Send**.

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

Note: 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.

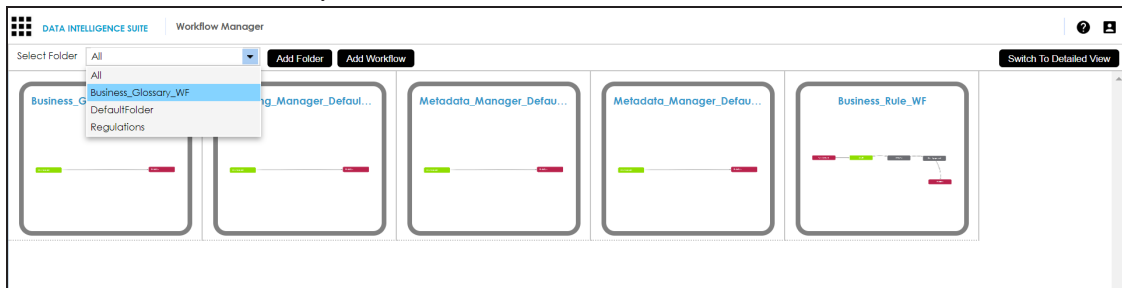
Before you assign workflows to business policies:

- 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.
- 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:

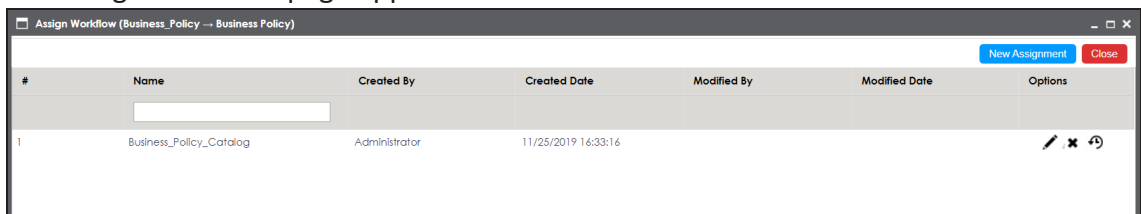
1. In the **Workflow Manager** page, select a folder.
All the workflows in the folder appears.

2. Select the folder where you added the workflow.



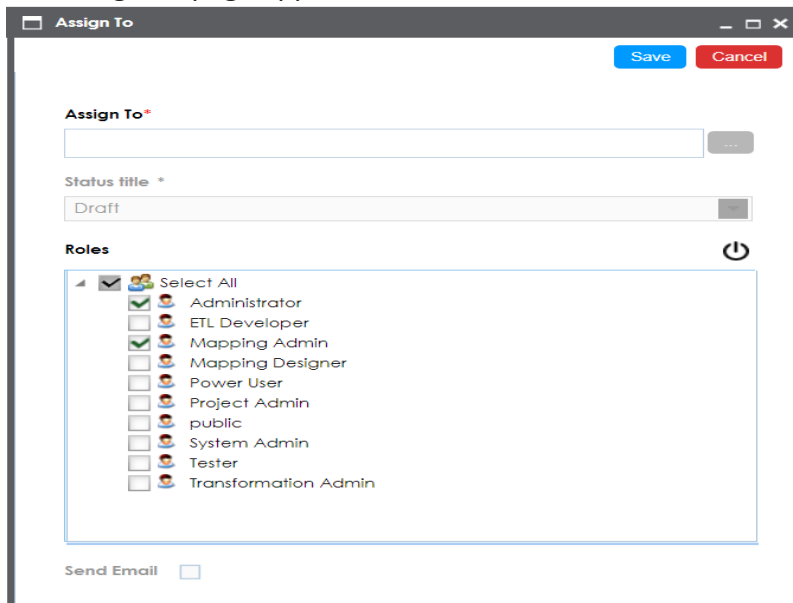
3. Hover over a workflow and click .

The Assign Workflow page appears.



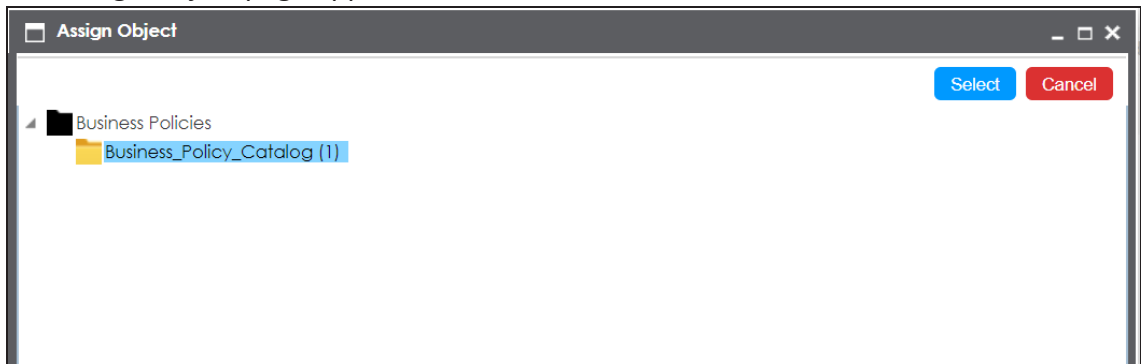
4. Click **New Assignment**.

The Assign To page appears.



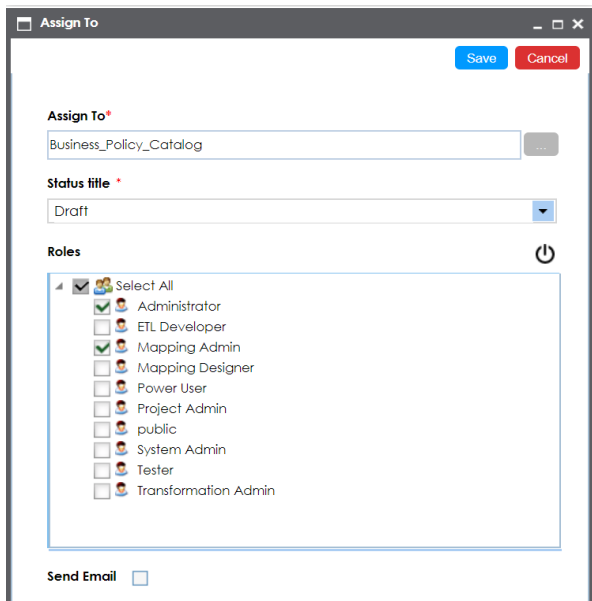
5. In **Assign To** field, click .

The Assign Object page appears.



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

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



7. Select an appropriate **Status Title** from which the workflow starts.

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

8. Select an appropriate **Roles**.
9. Select the **Send Email** check box to receive email notification.
10. 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 the workflow is assigned successfully to a business policy in business glossary manager, users who are part of the assigned roles will get work queue notifications. For more information on workflow execution via work queue notifications, refer to the [Executing Workflows for Business Policies via the Workflow Queue](#) topic.

Executing Workflows for Business Policies

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

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

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

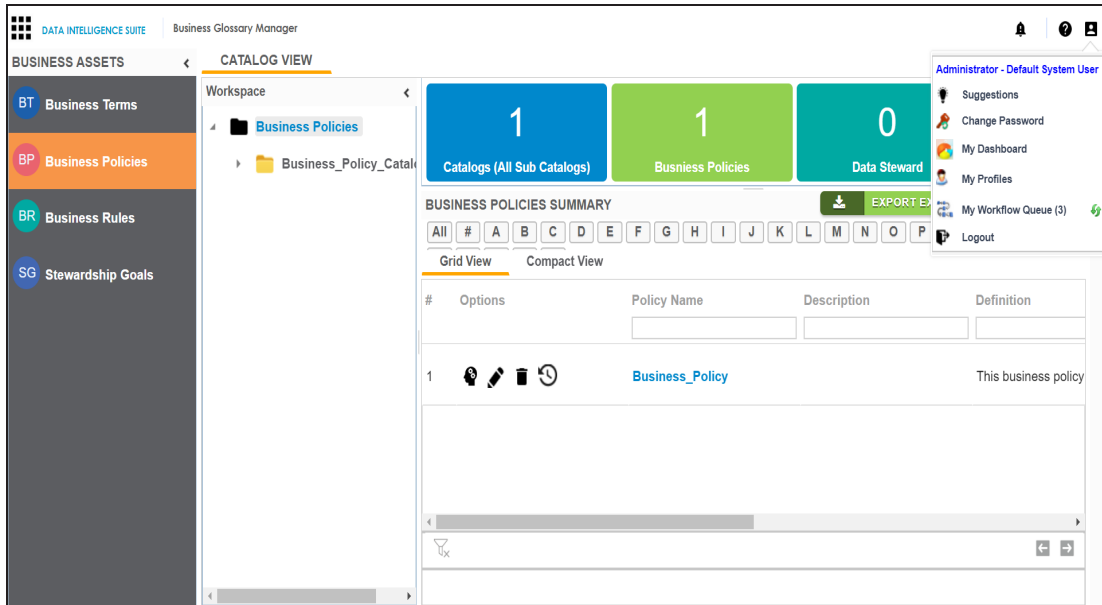
Executing workflows involves:

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

To execute workflows for business policies, follow these steps:


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

The Options menu appears.



3. Click **My Workflow Queue**.

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

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

My Workflow Queue								
Object Path :		Object Name :		Status Title :		Object Description :		
Bulk Update : <input type="checkbox"/> Off		Workflow : <input type="text" value="Select"/>		Assigned Object : <input type="text"/>		Status Title : <input type="text"/>		Trigger On : <input type="text"/>
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Business_Term_Catalog	Business Term	Business_Term		Draft	Current Status is draf.	Administrator	11/25/2019 15:00:33
2	Business_Rule_Catalog	Business Rule	Business_Rule	This is a business rule, for all the team across the organisation.	Draft		Administrator	11/25/2019 15:57:58
3	Business_Policy_Catalog	Business Policy	Business_Policy		Draft	Object created and moved to draft	Administrator	11/25/2019 17:46:11
Records from 1 to 3 of 3								

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

The Business Policy View page appears and the user can examine the business policy.

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

The Workflow Change Description page appears.

- Enter change description comments.
- Click **Save & Send**.

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

Note: 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](#).