



erwin Data Intelligence

Workflow Management Guide

Release v14.0



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Managing Workflows

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

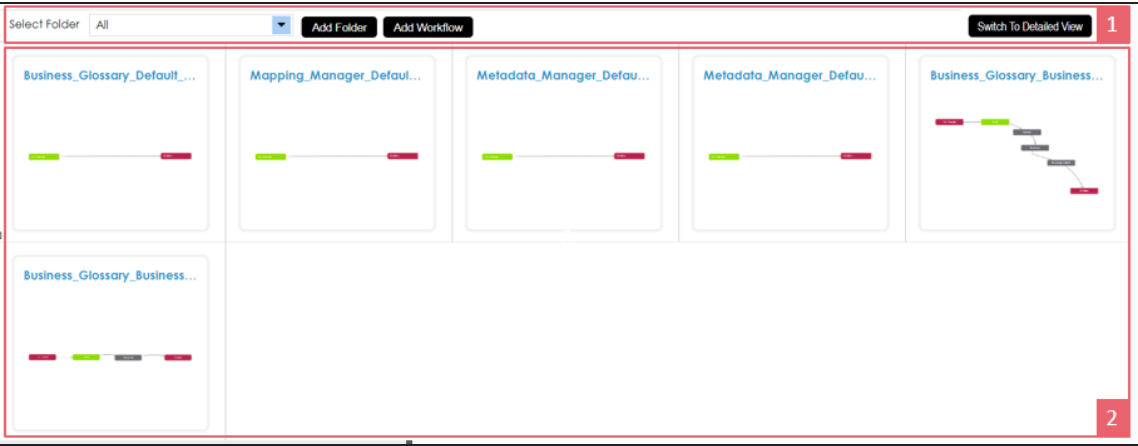
Also, you can create a collection of workflows and assign those workflows to any module based on the requirement.

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**. The Workflow Manager dashboard appears:



UI Section	Function
1-Utility Pane	The utility pane allows you to: • Select folders • Add folders • Add workflows • 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](#)

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 web form titled "Add Folder". At the top right of the form area are "Save" and "Cancel" buttons. Below the title bar, there is a "Name" label with a red asterisk, followed by a text input field. Below that is a "Description" label, followed by a rich text editor with a toolbar containing icons for bold, italic, underline, list, and other text formatting options, and a large text area for the description.

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:

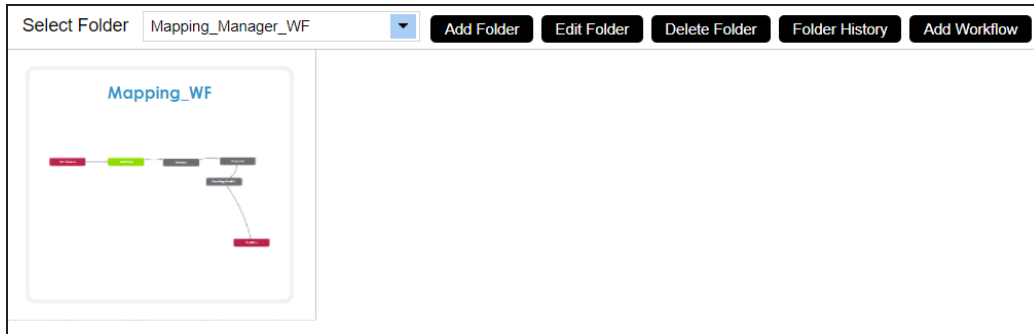
- [Add workflows](#)
- [Edit folders](#)
- [Delete folders](#)

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.



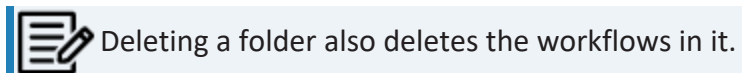
3. Click **Save**.

Delete Folders

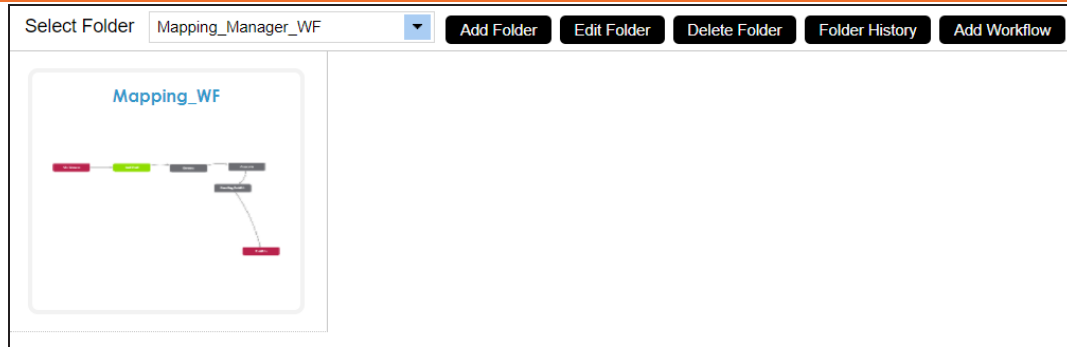
To delete a folder, follow these steps:

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

A warning message appears.



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.

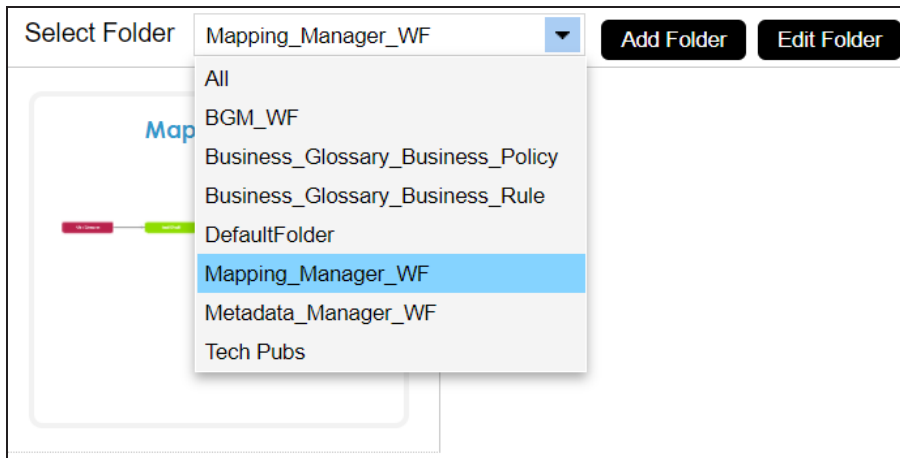
These workflows can be triggered automatically based on the requirements for:

- 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

Add Workflow

Folder * Save Cancel

Mapping_Manager_WF

Module *

Select

Object *

Trigger Type *

Name *

Description

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.

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.

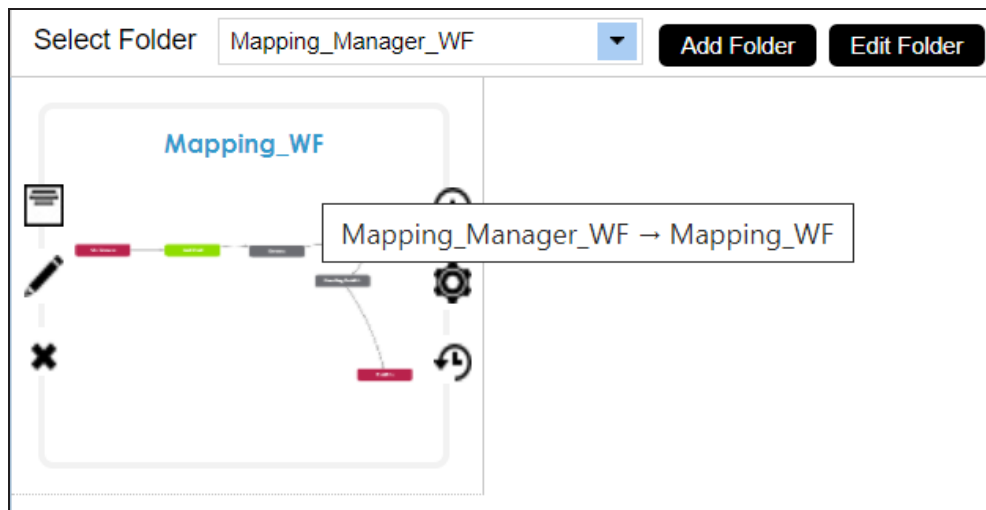
Once a workflow is added, you can:

- [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.



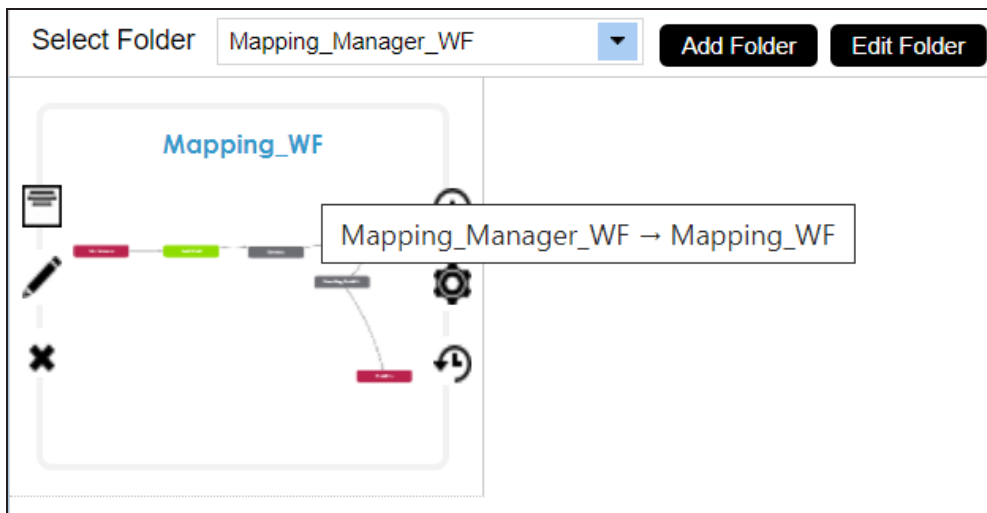
Adding Workflows

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.

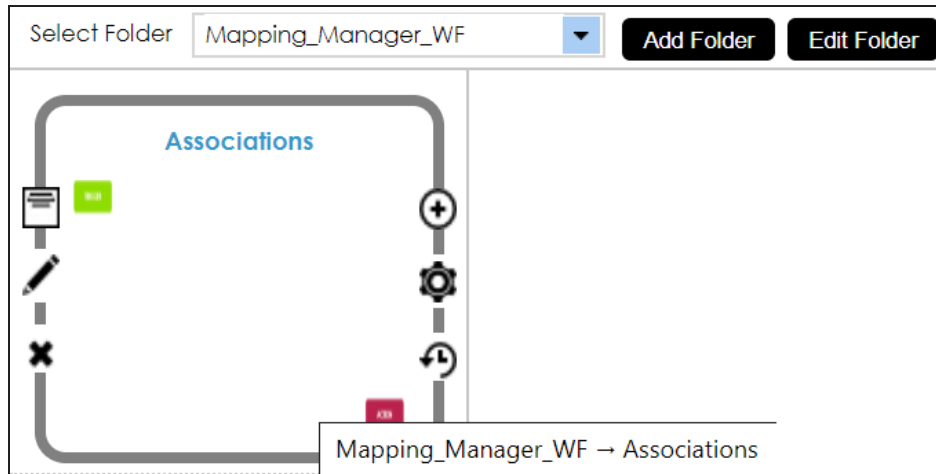
Configuring Workflows

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:

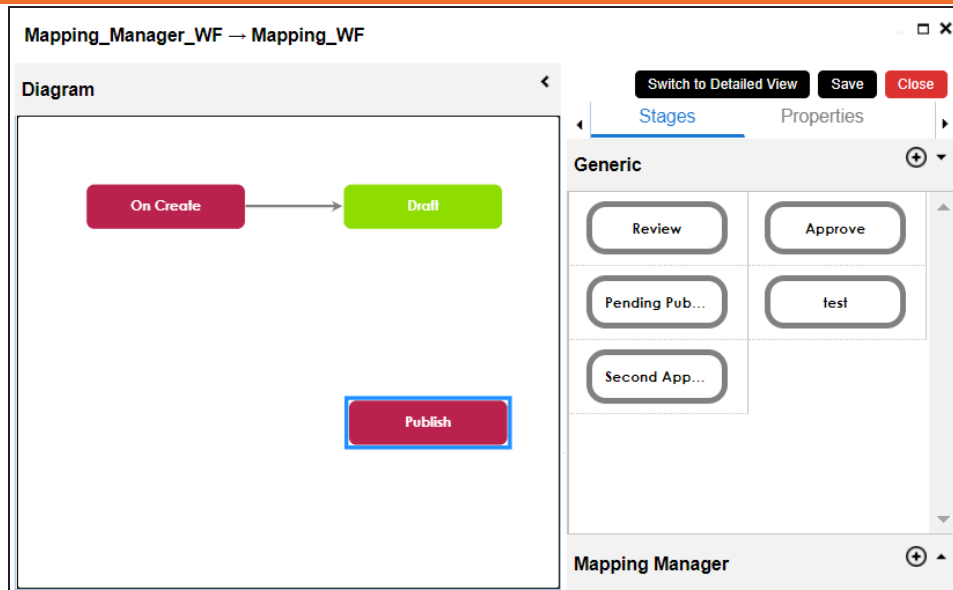
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.
The workflow pane displays a list of workflows.
3. Hover over a workflow.



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 displayed. It has three main sections: 'Name', 'Status title', and 'Description'. The 'Name' field is empty, with a red asterisk indicating it is required. Below it, a message says 'Stage Name is a required field'. The 'Status title' field is also empty, with a red asterisk and a message 'Status title is a required field'. The 'Description' field is empty and has a rich text editor toolbar above it. At the top right, there are 'Next' and 'Cancel' buttons.

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

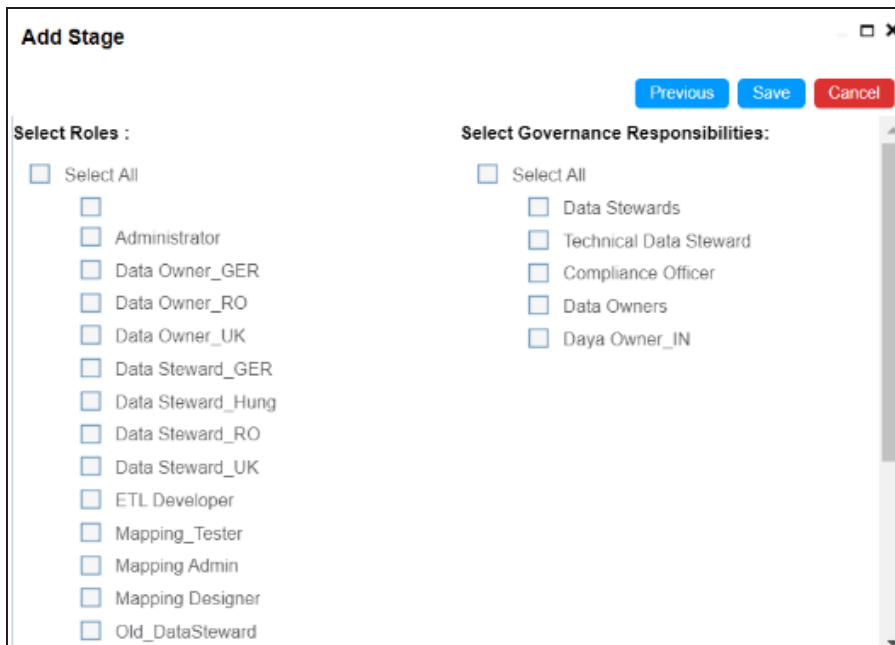
For example:

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

7. Click **Next**.

Configuring Workflows

The Add Stage page appears.



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

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

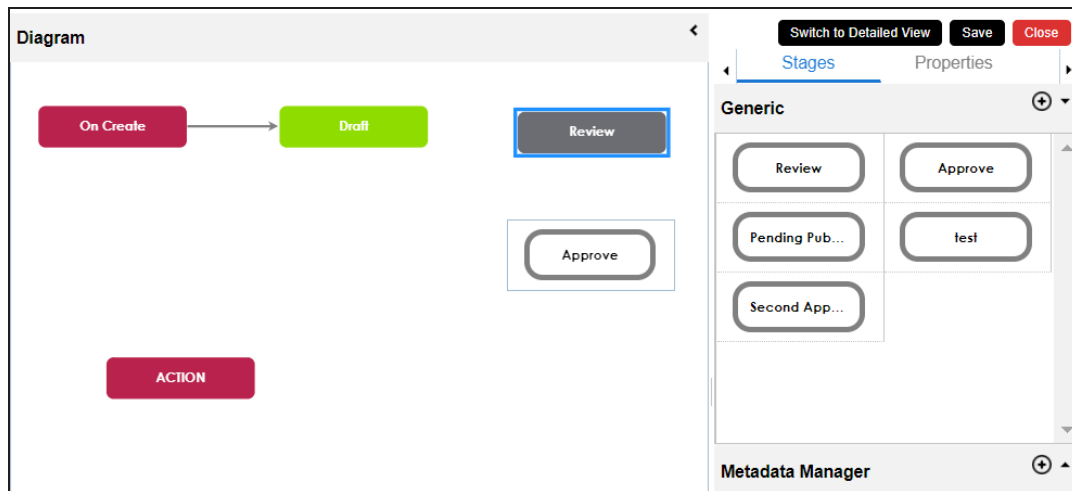
The generic stage is created. You can create as many generic stages you want and assign roles to each stage.

Adding Stages to Workflows

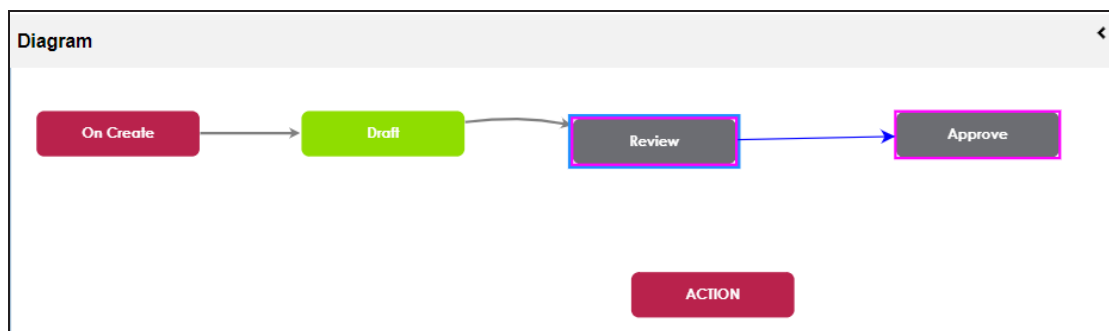
To add generic stages to workflows, follow these steps:

Configuring Workflows

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

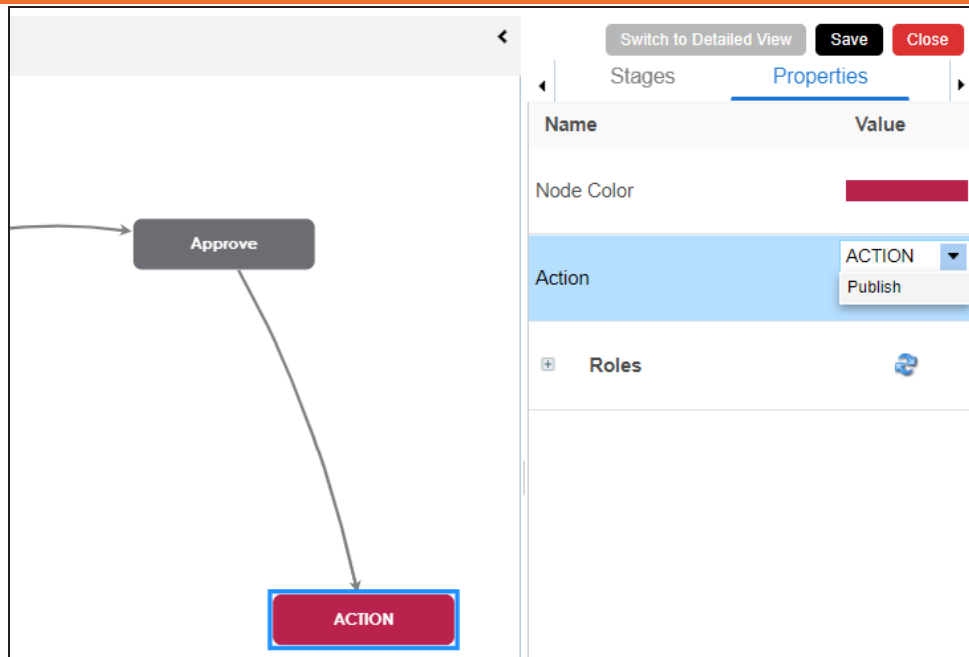


2. Drag the cursor from one stage to the next stage to connect the two stages.



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



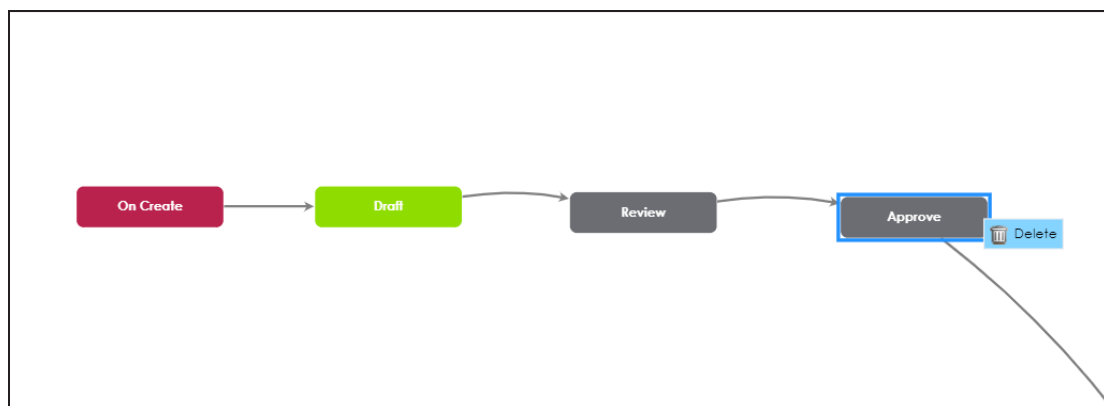
5. Expand the **Roles** node and select appropriate roles.
6. Click **Save**.

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.

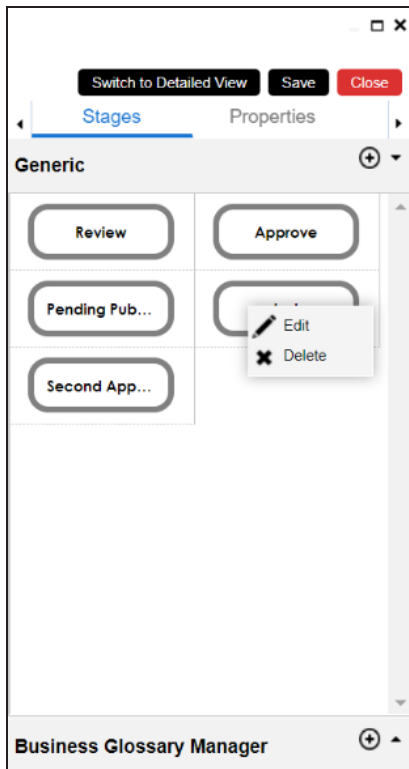
Managing Stages

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

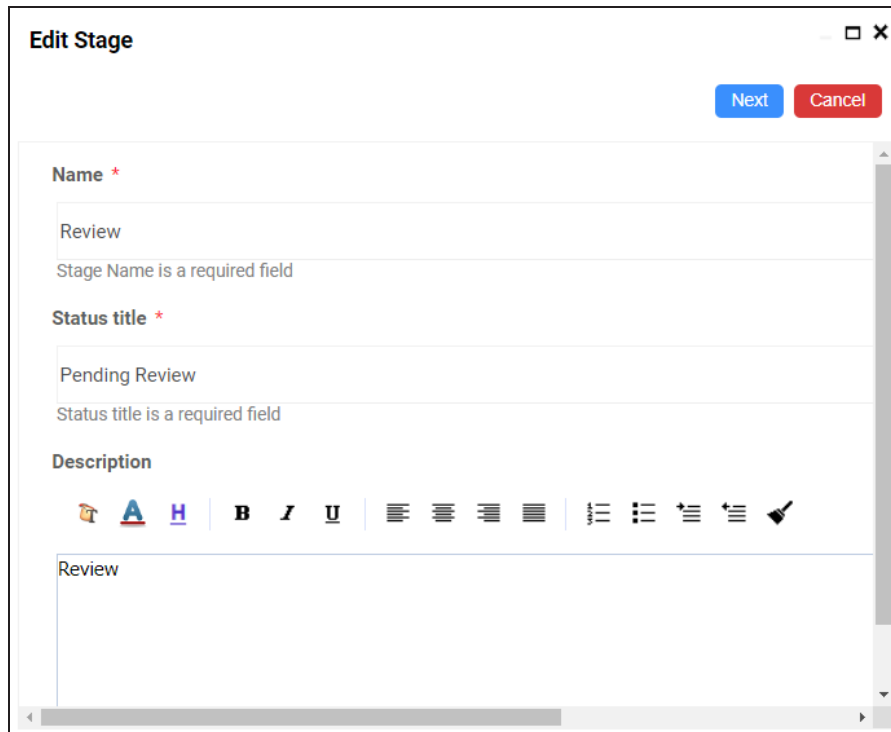
Use this option to update Name, Status Title, Description, and Roles assigned to the stage.

Click **Edit**.

Managing Stages

The Edit Stage page appears.

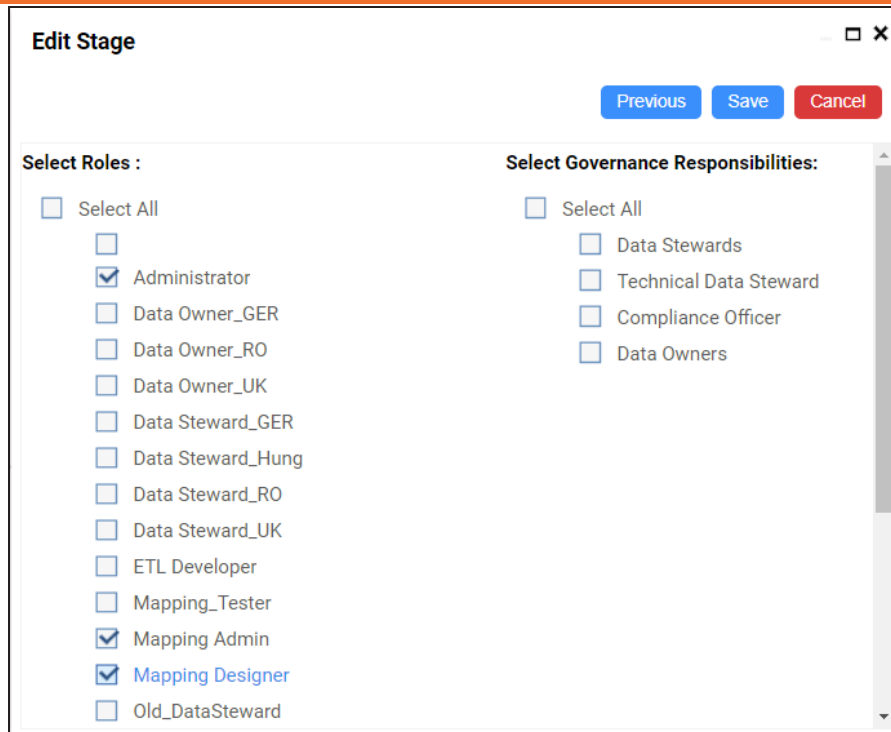
You can update the Name, Status Title, and Description.



The screenshot shows a web form titled "Edit Stage" with a close button (X) in the top right corner. Below the title are two buttons: "Next" (blue) and "Cancel" (red). The form contains three main sections: "Name *", "Status title *", and "Description". Each section has a text input field and a validation message below it. The "Name" field contains "Review" and the message is "Stage Name is a required field". The "Status title" field contains "Pending Review" and the message is "Status title is a required field". The "Description" field has a rich text editor toolbar with icons for text color, background color, bold, italic, underline, bulleted list, numbered list, link, unlink, and insert link, followed by a text area containing "Review".

Click **Next**.

You can update the roles assigned to the stage.



Edit 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

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.

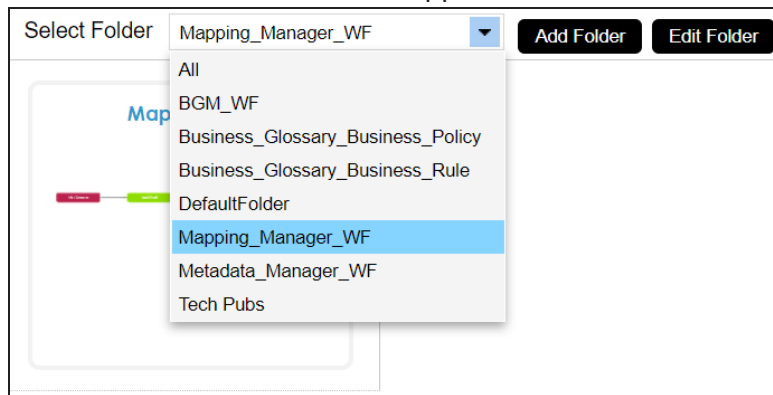
Before you assign workflows to a project:

- 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:

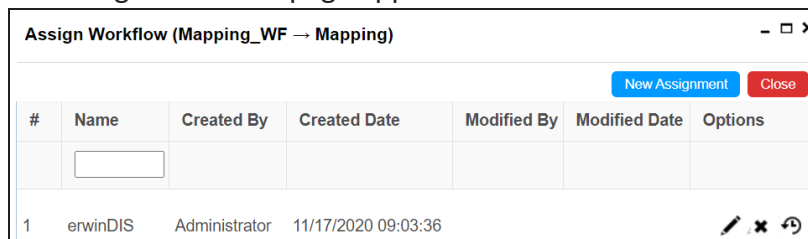
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



3. Hover over the required workflow, and click .

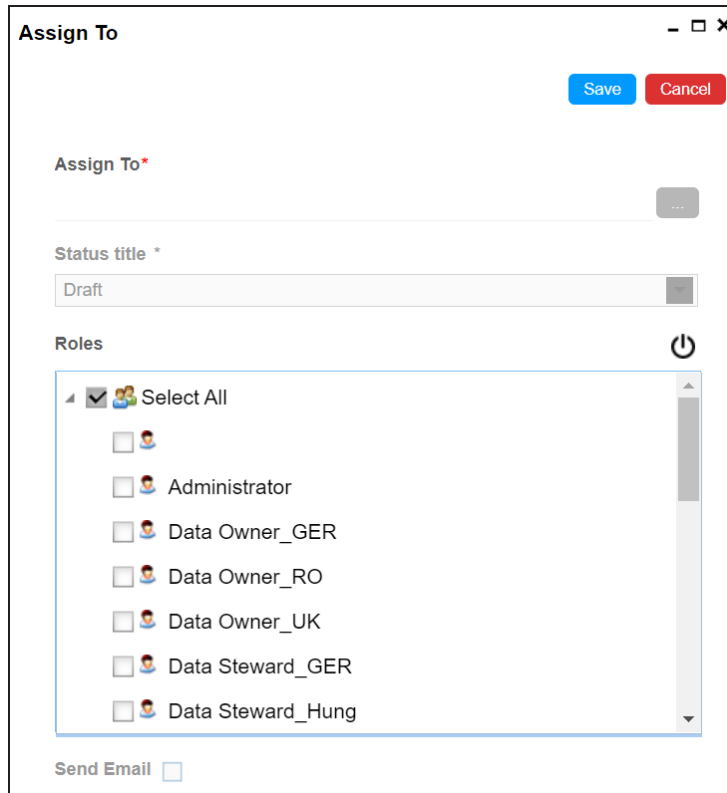
The Assign Workflow page appears.



Assigning Workflows to Projects

4. Click **New Assignment**.

The Assign To page appears.

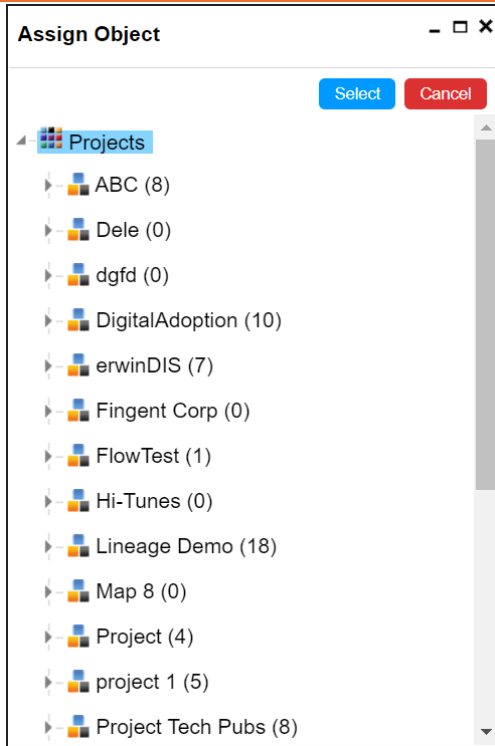


The screenshot shows a dialog box titled "Assign To" with standard window controls (minimize, maximize, close) in the top right corner. Below the title bar are two buttons: "Save" (blue) and "Cancel" (red). The main content area includes a label "Assign To *" followed by a text input field and a small grey button with three dots. Below this is a "Status title *" label with a dropdown menu currently showing "Draft". A "Roles" section features a power icon and a scrollable list of roles, each with a checkbox and a user icon. The roles listed are: "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 "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.

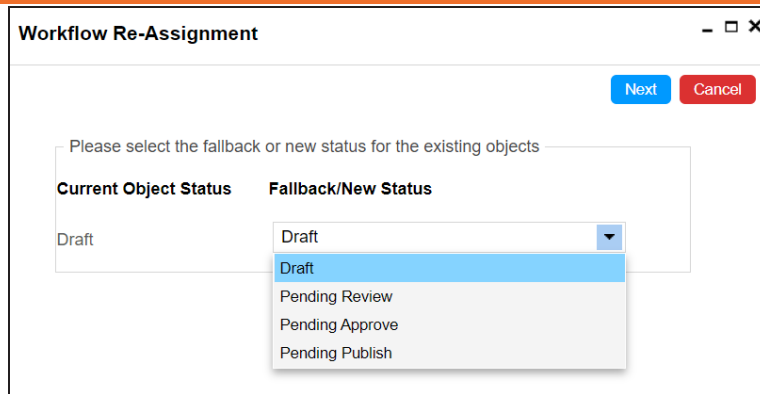
7. Click **Yes**.

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



The 'Workflow Re-Assignment' dialog box contains a 'Next' button and a 'Cancel' button. Below them is a text prompt: 'Please select the fallback or new status for the existing objects'. This is followed by a table with two columns: 'Current Object Status' and 'Fallback/New Status'. The 'Current Object Status' column has the value 'Draft'. The 'Fallback/New Status' column has a dropdown menu open, showing options: 'Draft' (highlighted), 'Pending Review', 'Pending Approve', and 'Pending Publish'.

Current Object Status	Fallback/New Status
Draft	Draft Pending Review Pending Approve Pending Publish

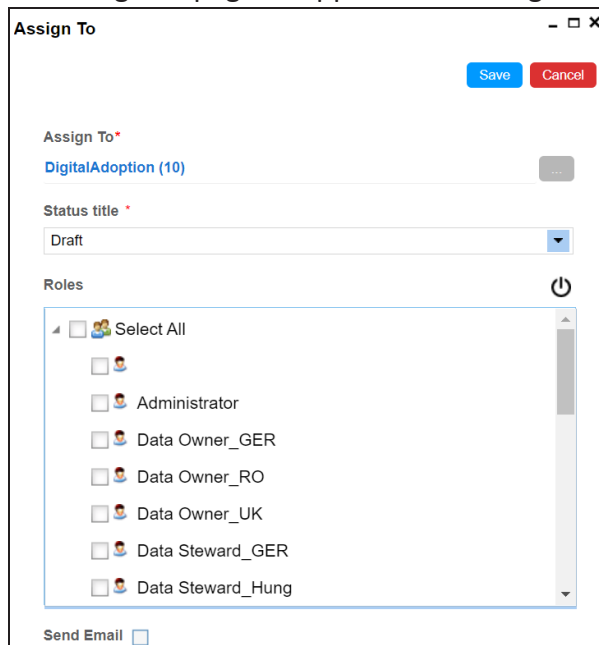
8. Select an appropriate **Fallback/New Status**.

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.



The 'Assign To' dialog box features a 'Save' button and a 'Cancel' button. It includes an 'Assign To*' field with the value 'DigitalAdoption (10)' and a dropdown arrow. Below this is a 'Status title*' field with a dropdown menu showing 'Draft'. The 'Roles' section has a 'Select All' button and a list of roles with checkboxes: Administrator, Data Owner_GER, Data Owner_RO, Data Owner_UK, Data Steward_GER, and Data Steward_Hung. At the bottom, there is a 'Send Email' checkbox.

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:

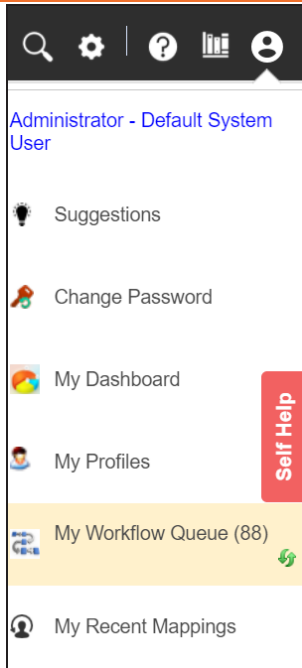
1. Go to **Application Menu > Data Catalog > Mapping Manager**.

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 :		Object Name :		Status Title :	Object Description :	
Bulk Update : ☐ OFF		WorkFlow : Select	Assigned Object :		Status Title :	Trigger On :
						Update Options
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	Lineage Demo	Mapping	Informatica_m_CRDR_RDM_CASA		Draft	Object created and moved to draft
2	Lineage Demo	Mapping	Talend_staging		Draft	Object created and moved to draft
3	Lineage Demo	Mapping	test		Draft	Object created and moved to draft
4	Lineage Demo	Mapping	TestDataMap1		Draft	Object created and moved to draft

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

- Click the <Object_Name> appearing as a hyperlink.

The Map View page appears.

Map View

[Send To - Review](#)

[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

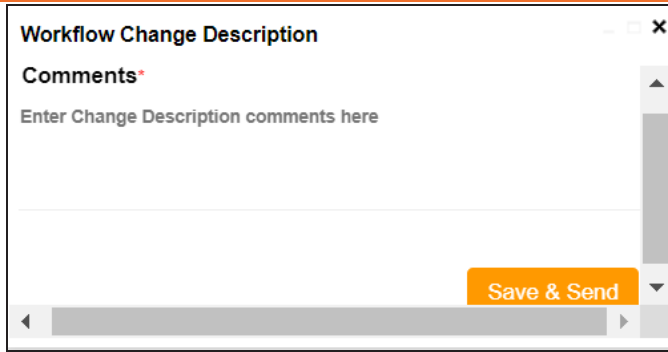
Modified Date Time

2020-10-14 08:02:07.943

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

The Workflow Change Description page appears.

Executing Workflows



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

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



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

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

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

Managing Metadata Manager Workflows

You can create metadata manager workflows for three objects:

- Environments
- Tables
- Columns

Creating and configuring metadata manager workflows involves:

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

After configuring generic workflows, you can:

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

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

Execution of metadata manager workflows via workflow queue involves:

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

Assigning Workflows to Environments

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

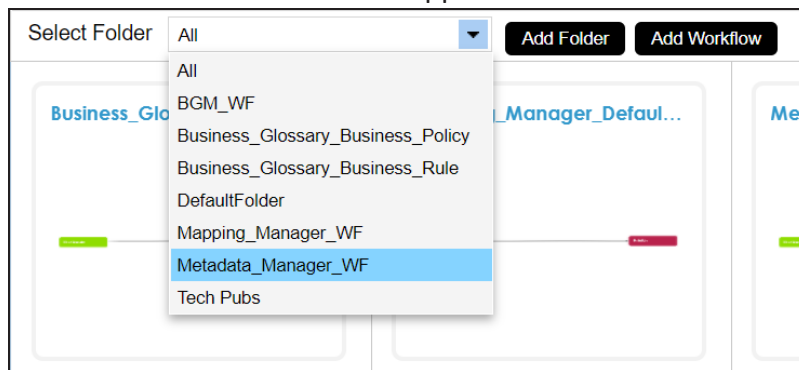
Before you assign workflows to an environment:

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

To assign workflows to environments, follow these steps:

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

All the workflows in the folder appears.



2. Hover over a workflow and click .

Assigning Workflows to Environments

The Assign Workflow page appears.

Assign Workflow (Environment_WF → Environment)- □ ×

New Assignment Close

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

3. Click **New Assignment**.

The Assign To page appears.

Assign To- □ ×

Save Cancel

Assign To*

Status title *

Roles⏻

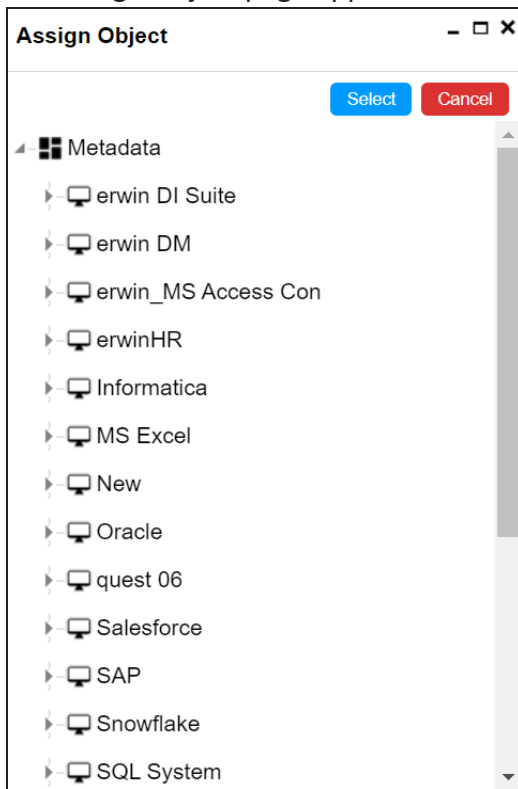
☒  Select All
☐ 
☐  Administrator
☐  Data Owner_GER
☐  Data Owner_RO
☐  Data Owner_UK
☐  Data Steward_GER
☐  Data Steward_Hung

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.

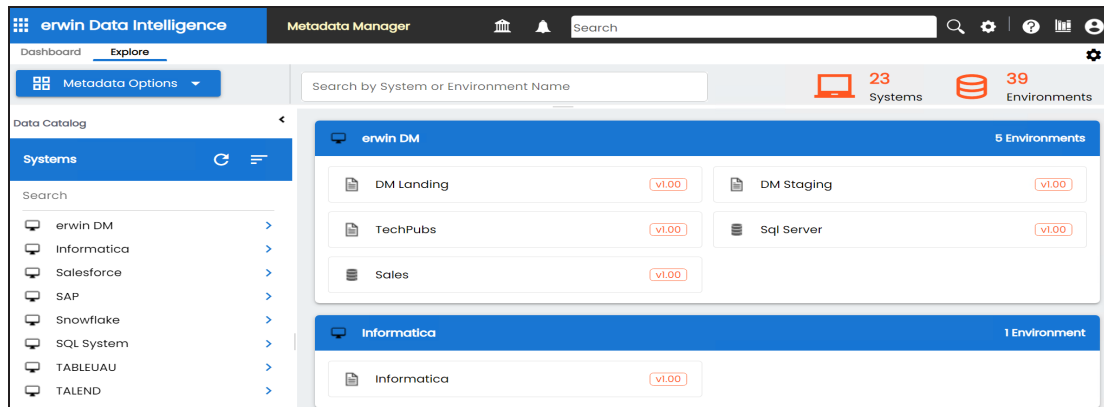
Executing workflows involves:

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.



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

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

Executing Workflows for Environments

My Workflow Queue

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

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

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

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

The search results are displayed.

My Workflow Queue

Object Path : Object Name : sql serverf Status Title : Object Definition : 

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

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

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

The Environment View page appears.

Executing Workflows for Environments

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



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.

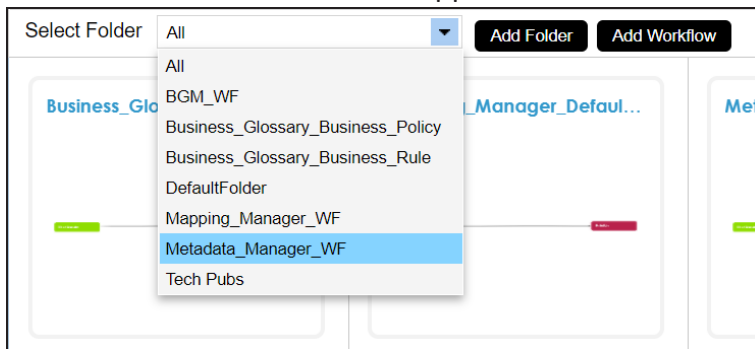
Before you assign workflows to tables:

- 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 .

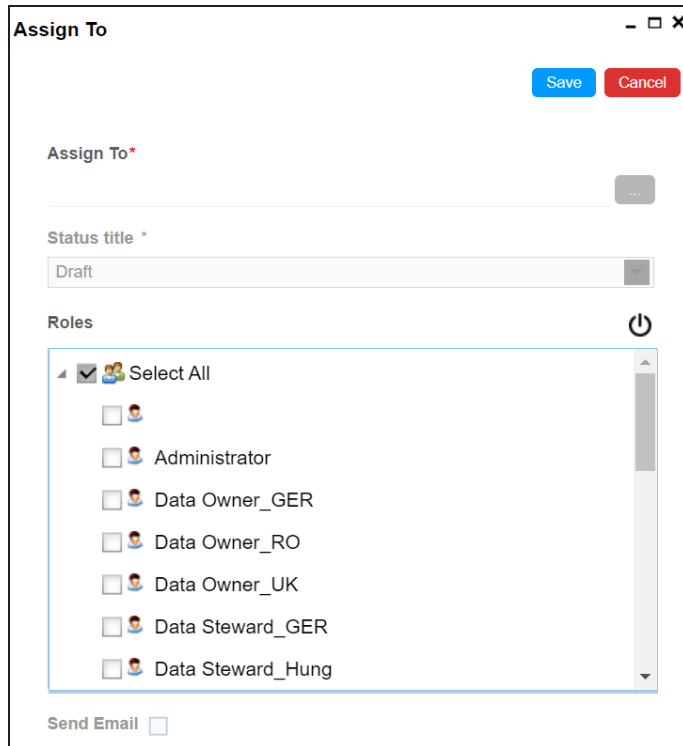
The Assign Workflow page appears.

Assign Workflow (Environment_WF → Environment)						
#	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.

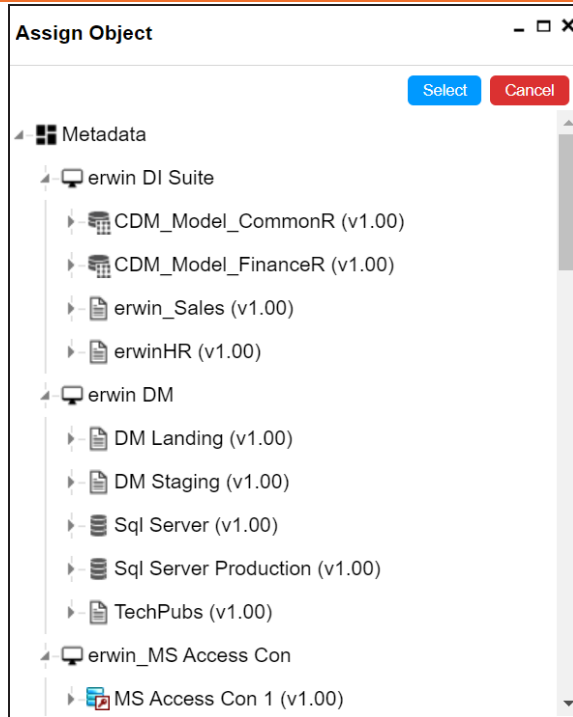


The screenshot shows a dialog box titled "Assign To" with standard window controls (minimize, maximize, close) in the top right corner. Below the title bar are two buttons: "Save" (blue) and "Cancel" (red). The main content area includes a label "Assign To*" followed by a text input field and a small grey button with three dots. Below this is a label "Status title *" followed by a dropdown menu currently showing "Draft". 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", "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 "Send Email" checkbox.

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

The Assign Object page appears.

Assigning Workflows to Tables

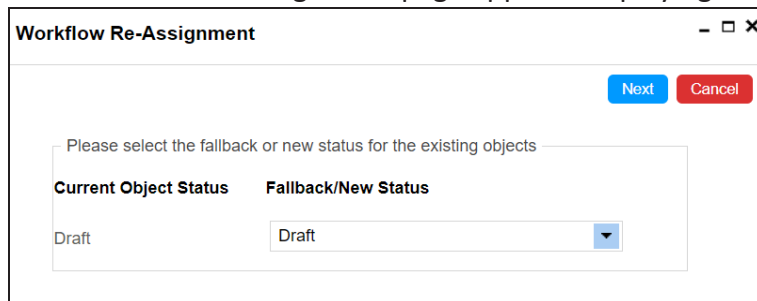


5. Click an Environment containing with required table.
6. Click **Select**.

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](#).

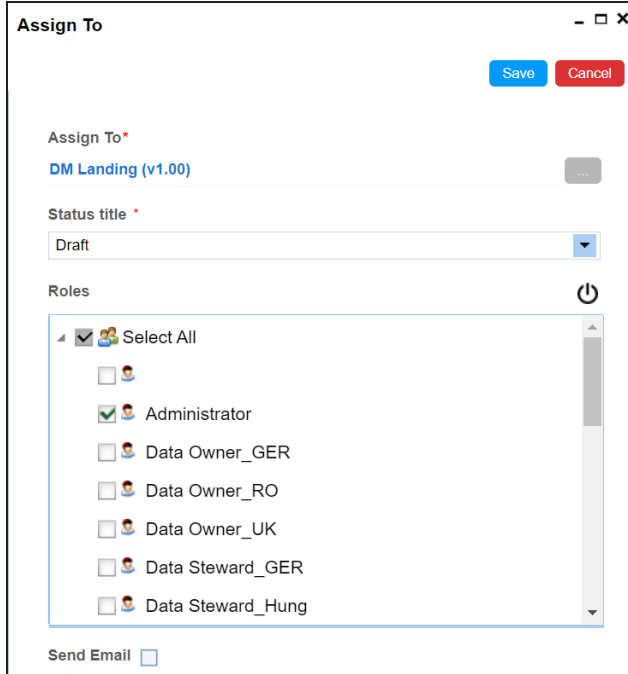
9. Click **Next**.

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.



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.

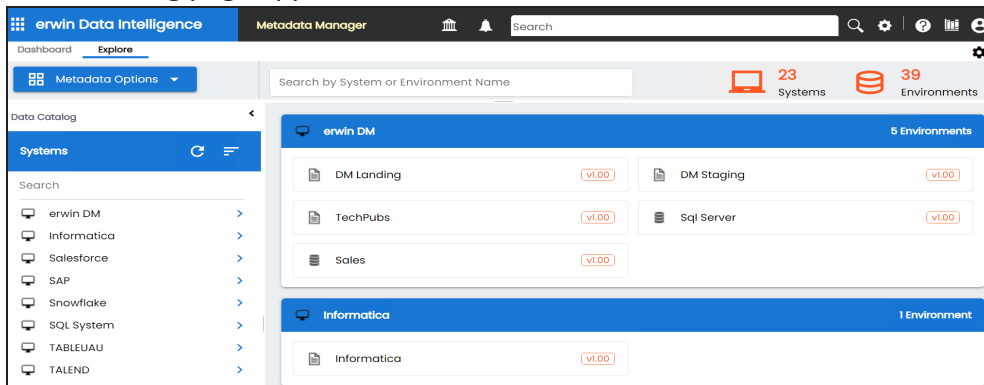
Executing workflows involves:

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.



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

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

The search results are displayed.

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

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

The Table View page appears.

Executing Workflows for Tables

The screenshot shows a 'Table View' window with two tabs: 'Properties' (selected) and 'Extended Properties'. The 'Properties' tab is divided into 'Technical Properties' and 'Business Properties' sections.

Technical Properties:

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		

Business Properties:

Data Steward		Logical Name	
Definition		Expanded Logical Name	
Comments		JSON Physical Name	
Sensitive Data Indicator (SDI) Flag		Used In Gap Analysis	☒
Sensitive Data Indicator (SDI) Classification		Sensitive Data Indicator (SDI) Description	
Class		Alias	
DQ Score			

A 'Send To - Review' button is located in the top right corner of the window.

- 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 has a title bar with 'Workflow Change Description' and standard window controls. Below the title bar is a 'Comments' section with a red asterisk. The text 'Enter Change Description comments here' is displayed. At the bottom right, there is an orange 'Save & Send' button.

- 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.

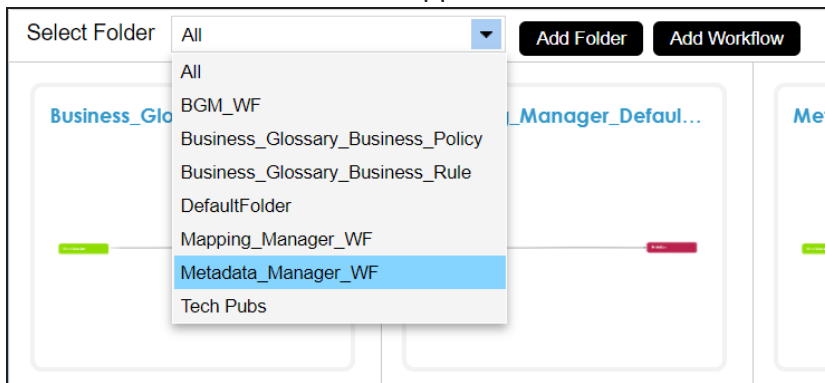
Before you assign workflows to columns:

- 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:

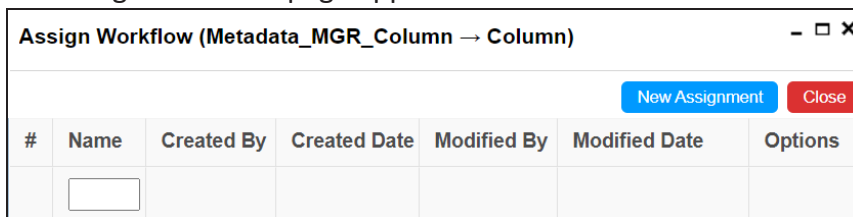
1. In the **Workflow Manager** page, select a folder.

All the workflows in the folder appear.



2. Hover over the required workflow and click .

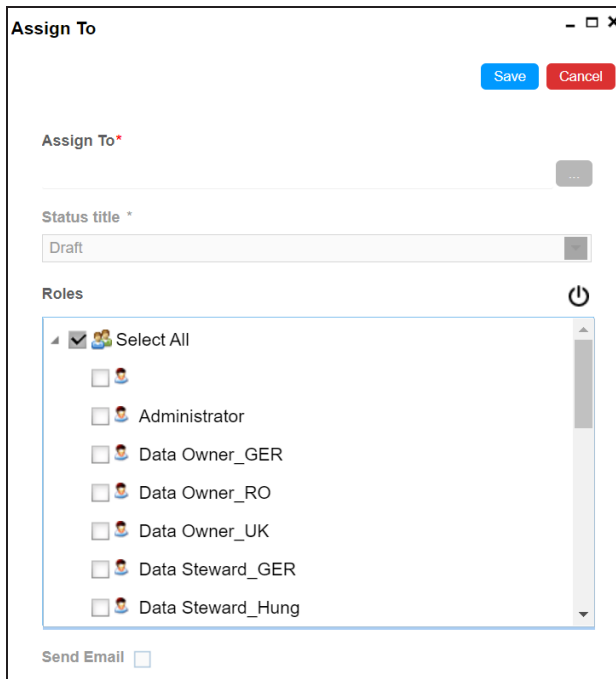
The Assign Workflow page appears.



3. Click **New Assignment**.

Assigning Workflows to the Columns

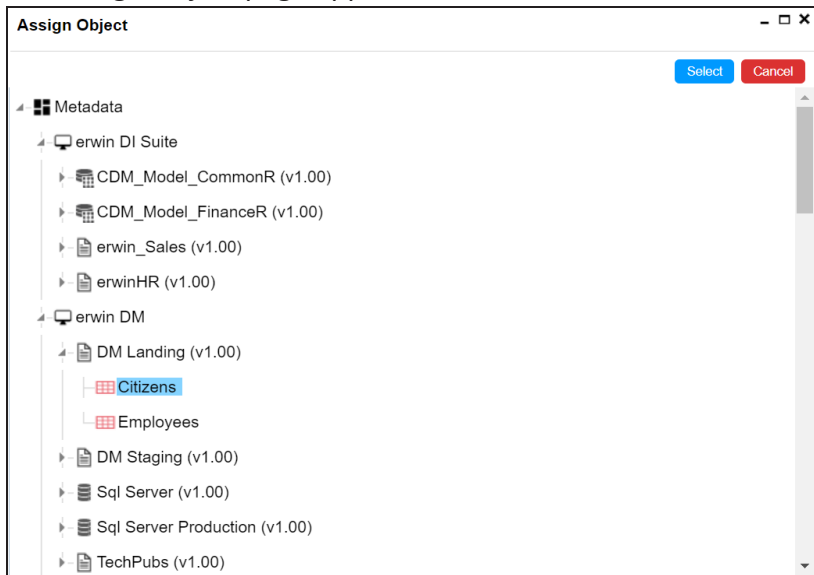
The Assign To page appears.



The 'Assign To' dialog box is shown. It has a title bar with standard window controls. Inside, there are 'Save' and 'Cancel' buttons at the top right. Below them is an 'Assign To*' field with a dropdown arrow. Underneath is a 'Status title*' field with a dropdown arrow, currently showing 'Draft'. A 'Roles' section follows, featuring 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, there 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. Inside, there are 'Select' and 'Cancel' buttons at the top right. Below them is a tree view under the 'Metadata' header. The tree is expanded to show 'erwin DM', which contains several objects: 'DM Landing (v1.00)', 'Citizens' (highlighted in blue), 'Employees', 'DM Staging (v1.00)', 'Sql Server (v1.00)', 'Sql Server Production (v1.00)', and 'TechPubs (v1.00)'. Other objects under 'erwin DI Suite' are also visible.

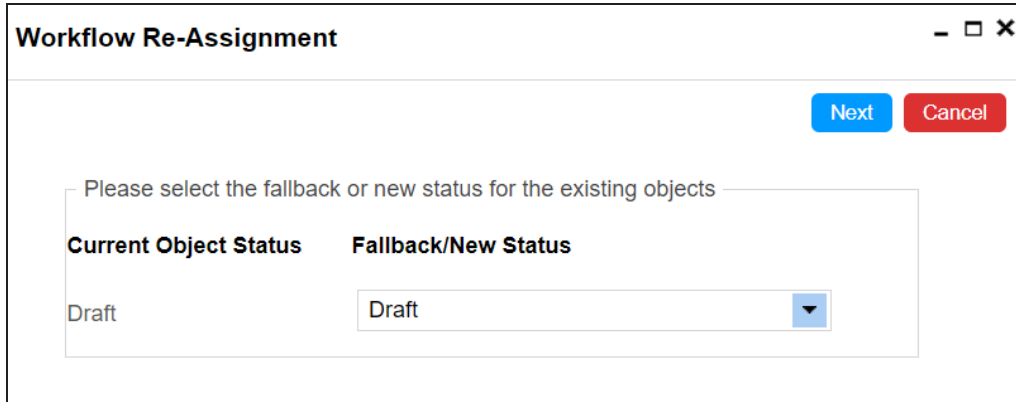
5. Select a table with necessary columns and click **Select**.

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: "Next" (blue) and "Cancel" (red). Below these buttons is a text prompt: "Please select the fallback or new status for the existing objects". Underneath the prompt is a table with two columns: "Current Object Status" and "Fallback/New Status". The "Current Object Status" column contains the text "Draft". The "Fallback/New Status" column contains a dropdown menu with "Draft" selected and a downward arrow icon.

Current Object Status	Fallback/New Status
Draft	Draft ▼

7. Select the appropriate Fallback/New Status.

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

8. Click **Next**.

The Comments page appears.

9. Enter relevant comments, and click .

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

The screenshot shows a dialog box titled "Assign To" with standard window controls (minimize, maximize, close) in the top right corner. Inside the dialog, there are two buttons at the top right: "Save" (blue) and "Cancel" (red). Below these, the "Assign To*" field is set to "Citizens" with a dropdown arrow. The "Status title *" field is a dropdown menu currently showing "Draft". The "Roles" section features a power icon and a list of roles, each with a checkbox and a user icon. The roles are: "Select All" (checked), "Administrator" (checked), "Data Owner_GER", "Data Owner_RO", "Data Owner_UK", "Data Steward_GER", and "Data Steward_Hung". At the bottom of the dialog is a "Send Email" checkbox, which is currently unchecked.

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

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

11. Select the appropriate **Roles**.

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

13. Click **Save**.

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

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

Executing Workflows for Columns

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

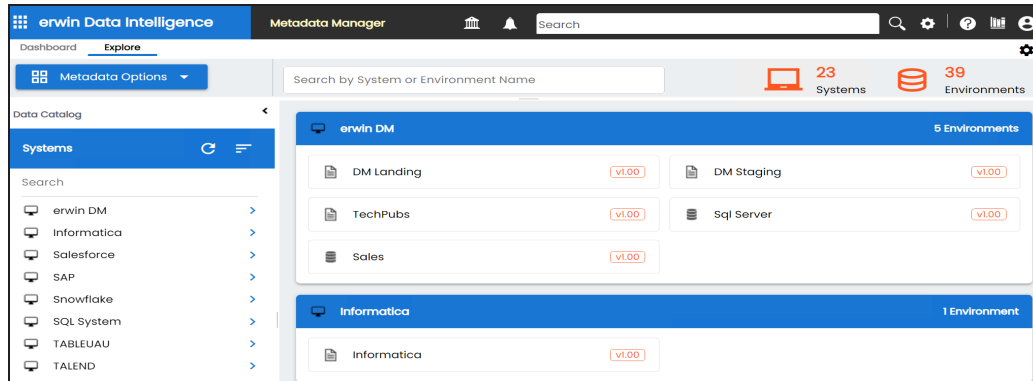
Executing workflows involves:

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

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

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

The following page appears.



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

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

Executing Workflows for Columns

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

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

The search results are displayed.

My Workflow Queue								
Object Path : erwin DM/Sql Server Products		Object Name : category		Status Title :		Object Definition :		
Bulk Update : ☒ on		Workflow : Select		Assigned Object :		Status Title :		Trigger On :
								Update Options
#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
26	SQL System/Northwind/dbo.Alphabetical list of products	Column	CategoryID		Draft	Object created and moved to draft	Administrator	02/26/2020 03:57:44
27	SQLTechPubs/SQLTechPubs	Table	dbo.Products by Category		Draft	Object created and moved to Draft	Administrator	06/24/2020 08:09:04
28	SQLTechPubs/SQLTechPubs	Table	dbo.Sales by Category		Draft	Object created and moved to Draft	Administrator	06/24/2020 08:09:04
29	SQL System/Northwind/dbo.Alphabetical list of products	Column	CategoryName		Draft	Object created and moved to draft	Administrator	02/26/2020 03:57:44

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

The Column View page appears.

Executing Workflows for Columns

The screenshot shows a 'Column View' dialog box with two tabs: 'Properties' (selected) and 'Extended Properties'. The 'Properties' tab contains a table of technical properties for a column named 'CitizenID'. The 'Workflow Status' is 'Draft'. A 'Send To - Review' button is located in the top right corner.

Technical Properties	
Name	CitizenID
Data Domain	
Precision	
DB Default Value	
Nullable Flag	☒
Natural Key Flag	☐
Foreign Key Flag	☐
Foreign Key Column Name	
Minimum Value	
File Starting Position	
Attribute Type	ENTITY_ELEMENT
Workflow Status	Draft

- 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. It has a 'Comments' section with a text area for entering change description comments. A 'Save & Send' button is located at the bottom right.

- 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.

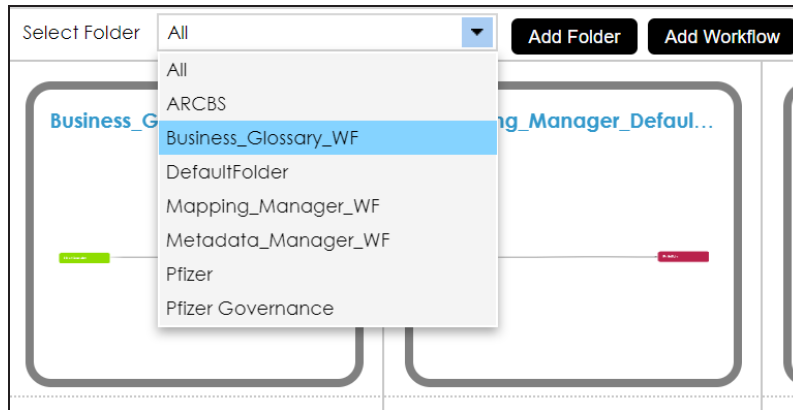
Before you assign workflows to business terms:

- 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

Assign Workflow (Business_Glossary_Business_Rule → Business Rule) - □ ×

New Assignment Close

#	Name	Created By	Created Date	Modified By	Modified Date	Options
1	TechPubs	Administrator	04/10/2020 07:43:44			  

4. Click **New Assignment**.

The Assign To page appears.

Assign To - □ ×

Save Cancel

Assign To * ...

Status title *
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

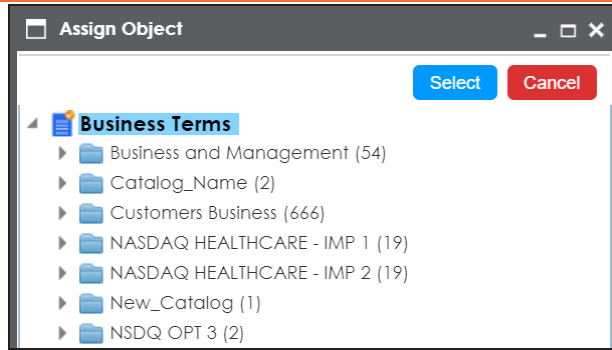
- ☐  Data Stewards
- ☐  Data Owners
- ☐  Technical Data Steward
- ☐  Compliance Officer

Send Email ☐

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

The Assign Object page appears.

Assigning Workflows to Business Terms

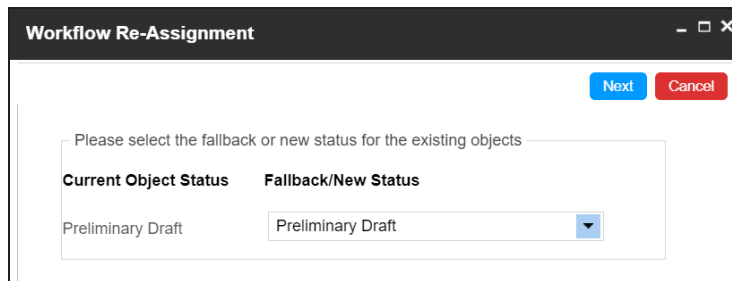


6. Select a catalog and click **Select**.

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 a window titled "Assign To" with a dark header bar containing "Assign To" and window control icons. In the top right corner of the window are "Save" and "Cancel" buttons. The main content area includes:

- Assign To ***: A dropdown menu showing "Customer Terms" with a plus icon to its right.
- Status title ***: A dropdown menu showing "Preliminary Draft".
- Roles**: A section with a power icon and a list of roles. The "Select All" checkbox is checked. The roles listed are:
 - ☐ Administrator
 - ☒ Data Owner_GER
 - ☒ Data Owner_RO
 - ☐ Data Owner_UK
 - ☐ Data Steward_GER
 - ☐ Data Steward_Hung
- Governance Responsibility**: A section with a list of roles. The "Select All" checkbox is unchecked. The roles listed are:
 - ☐ Data Stewards
 - ☐ Data Owners
 - ☐ Technical Data Steward
 - ☐ Compliance Officer
- Send Email**: A checkbox at the bottom left, 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.

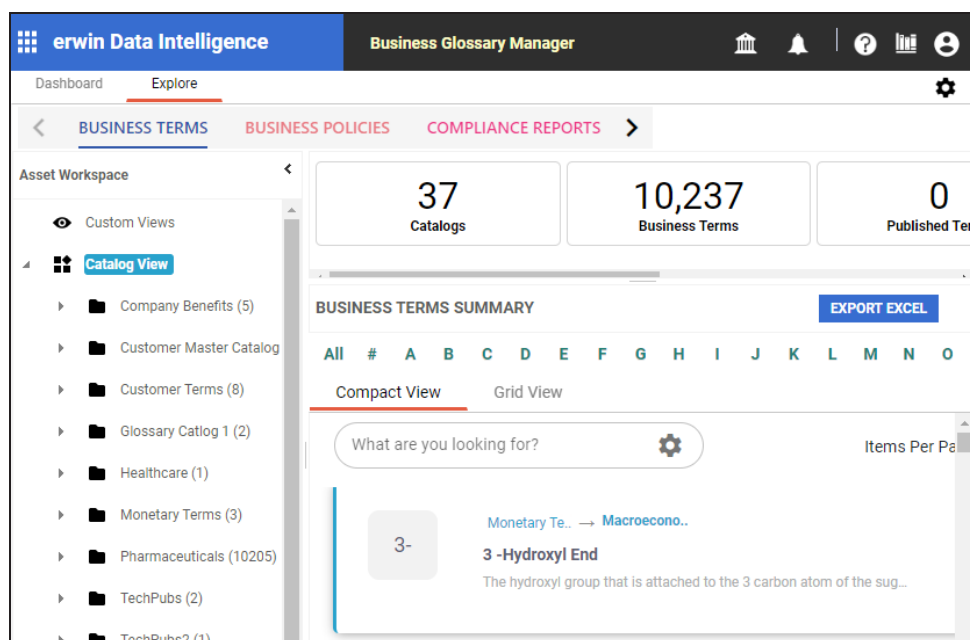
Executing workflows involves:

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

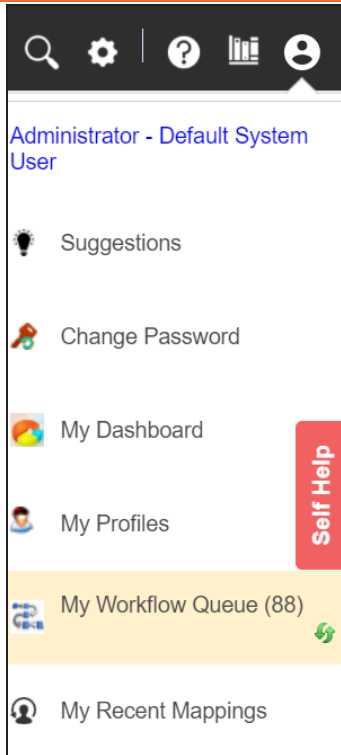
To execute workflows for the business terms, follow these steps:

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 :	☐	WorkFlow :		Assigned Object :		Status Title : Trigger On :
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments
1	Testing Techniques	Business Term	Agile Testing	Testing is NOT a Phase: Agile team tests continuously and continuous testing is the only way to ensure continuous progress. 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	Beta Testing	A beta test is the second phase of software testing in which a sampling of the intended audience tries the product out. (Beta is the second letter of the Greek alphabet.) Originally, the term alpha testing meant the first phase of testing in a software development process.	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 : Select

Assigned Object :

#	Object Path	Object Type	Object Name
1	Customer Master Catalog	Business Term	CUSTOMER
2	TechPubs	Business Term	Customer Address
3	TechPubs	Business Term	Customer Email
4	Customer Terms	Business Term	Customer First Name
5	Customer Terms	Business Term	Customer Last Name
6	Customer Terms	Business Term	Customer Phone Number

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

The <Business_Term> page appears.

 **CUSTOMER**
Customer Master Catalog

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

Term Details

Business Term

CUSTOMER

Definition

a person who buys your product

Workflow Status

Pending Review

Governance Responsibilities

Data Stewards

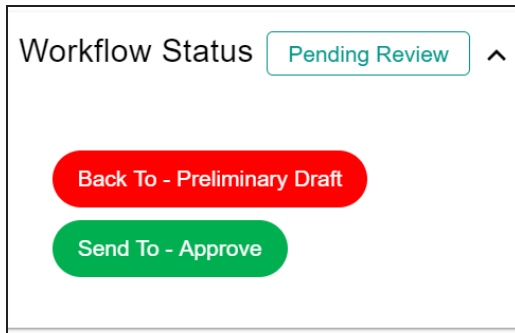
Mike Mannigan

Mike Menza

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

Executing Workflows for Business Terms

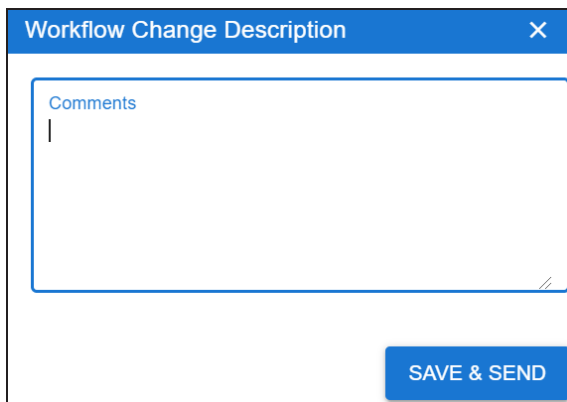
The available options appear. These options depend on the stages of the assigned workflow.



A dialog box titled "Workflow Status" with a "Pending Review" status indicator and an upward arrow. Below the status, there are two buttons: a red button labeled "Back To - Preliminary Draft" and a green button labeled "Send To - Approve".

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

The Workflow Change Description page appears.



A dialog box titled "Workflow Change Description" with a close button (X). It contains a text area labeled "Comments" with a vertical cursor. At the bottom right, there is a blue button labeled "SAVE & SEND".

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.

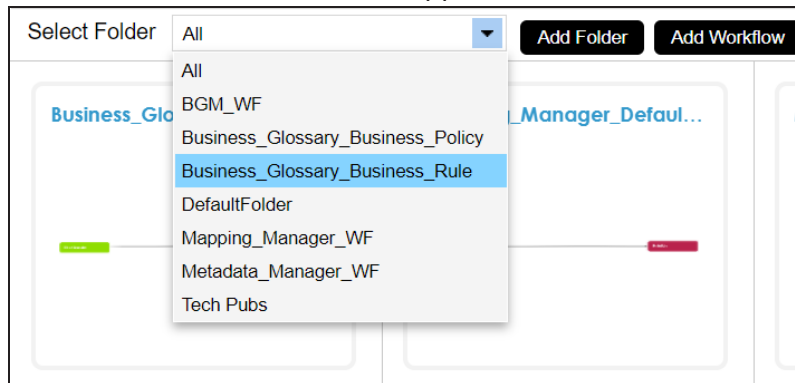
Before you assign workflows to business rules:

- 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

Assign Workflow (Business_Glossary_Business_Rule → Business Rule)

New Assignment

Close

#	Name	Created By	Created Date	Modified By	Modified Date	Options
1	TechPubs	Administrator	04/10/2020 07:43:44			

4. Click **New Assignment**.

The Assign To page appears.

Assign To

Save

Cancel

Assign To*

Status title *

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

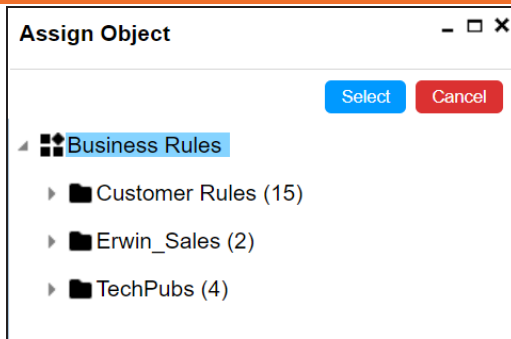
Compliance Officer

Send Email

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

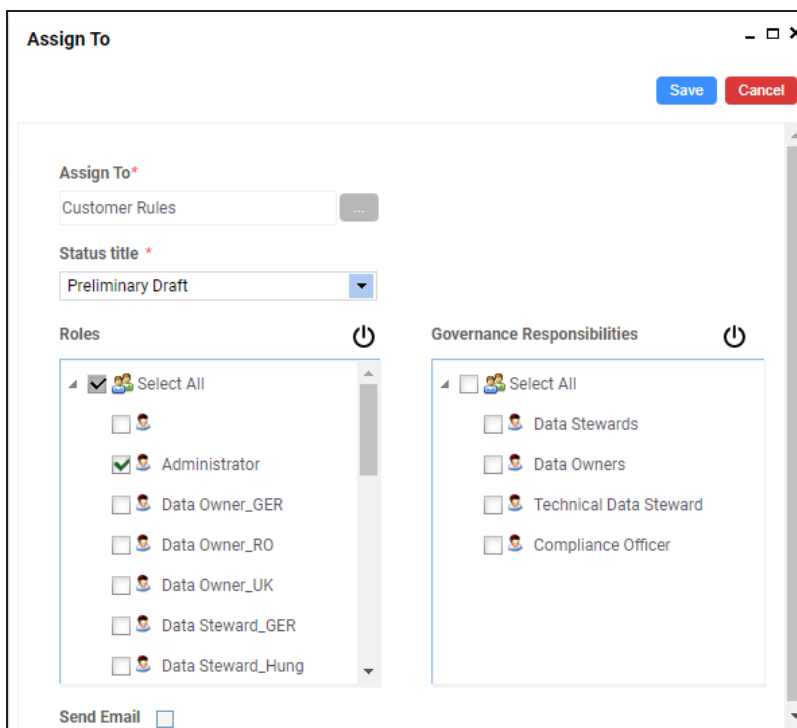
The Assign Object page appears.

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.

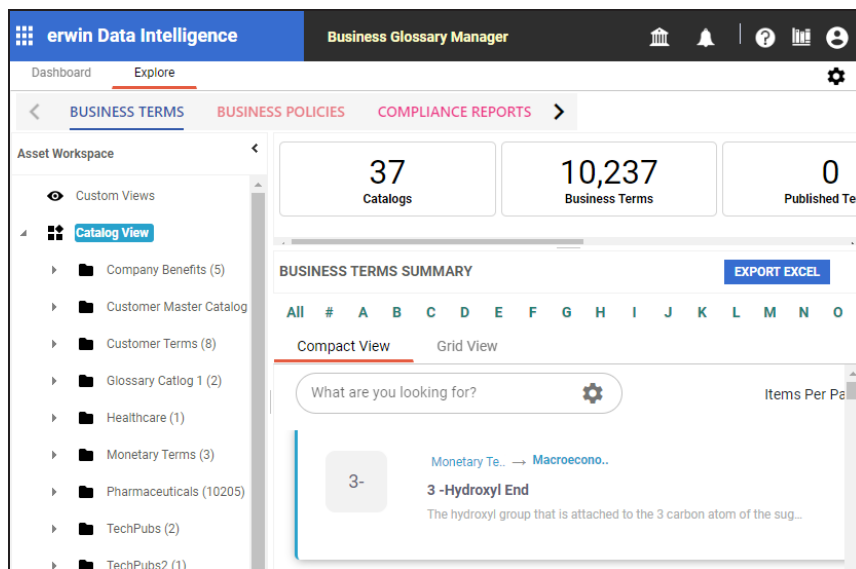
Executing workflows involves:

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:

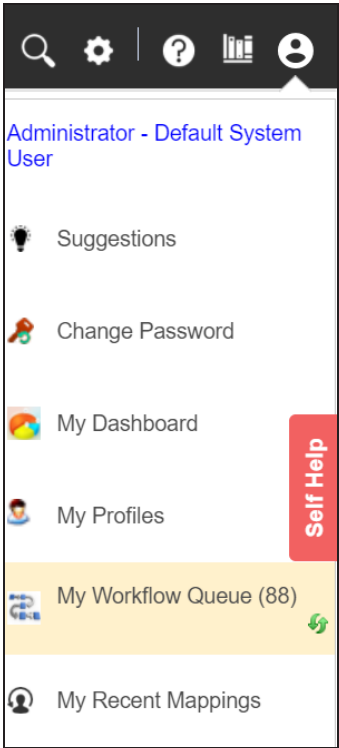
1. Go to **Application Menu > Data Literacy > Business Glossary Manager > Explore**.



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 .

My Workflow Queue

Object Path :

Object Name : Analysis

Status Title :

Object Description :

Bulk Update :

OFF

Workflow :

Select

Assigned Object :

Status Title :

Trigger On :

#	Object Path	Object Type	Object Name	Object Description	Status Title	Com
1	TechPubs	Business Rule	Analysis		Draft	Object
2	Pharmaceuticals/International Society for Pharmaceutical Engineering - ISPE	Business Term	Algorithm Analysis	LEN(D322)	Draft	Object
3	Pharmaceuticals/International Society for Pharmaceutical Engineering - ISPE	Business Term	Amino Acid Analysis	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 configuring a business rule workflow. At the top, the title is "Respect time" with a close button (X). Below the title is the name "Erwin_Sales". A navigation bar includes links for "View Business Rule", "Associations", "Rich Media Library", "WorkFlow Log", and "History". On the right side of the navigation bar are icons for edit, refresh, and delete. The main content area is divided into two columns. The left column, titled "Rule Details", contains a "Business Rule" section with the text "Respect time" and a "Definition" section 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 right column contains a "Workflow Status" section with a dropdown menu currently set to "Preliminary Draft", a "Governance Responsibilities" section with the text "No Assignments Found", and a "Classification" section with a toggle switch for "Sensitive Data Indicator(SDI)".

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

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

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

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

The Workflow Change Description page appears.

The screenshot shows a dialog box titled "Workflow Change Description" with a close button (X). Inside the dialog box is a text area labeled "Comments" with a cursor. At the bottom right of the dialog box is a blue button labeled "SAVE & SEND".

Executing Workflows for Business Rules

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

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



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

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

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

Assigning Workflows to Business Policies

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

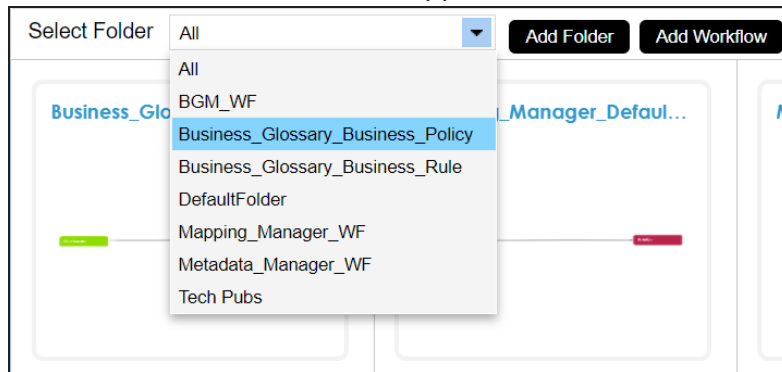
Before you assign workflows to business policies:

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

To assign workflows to business policies, follow these steps:

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

All the workflows in the folder appears.



3. Hover over a workflow and click .

The Assign Workflow page appears.

Assigning Workflows to Business Policies

Assign Workflow (Business_Glossary_Business_Policy → Business Policy)

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

#	Name	Created By	Created Date	Modified By	Modified Date	Options
1	TechPubs	Administrator	04/10/2020 07:06:50			  

4. Click **New Assignment**.

The Assign To page appears.

Assign To

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

Assign To*

Status title *

Roles

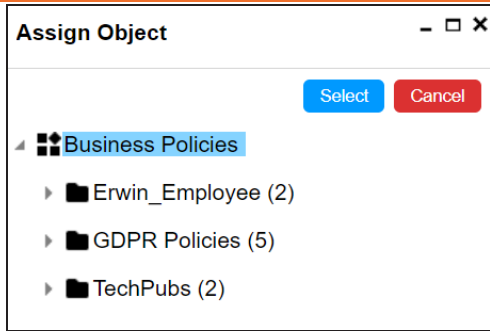
Governance Responsibilities

Send Email ☐

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

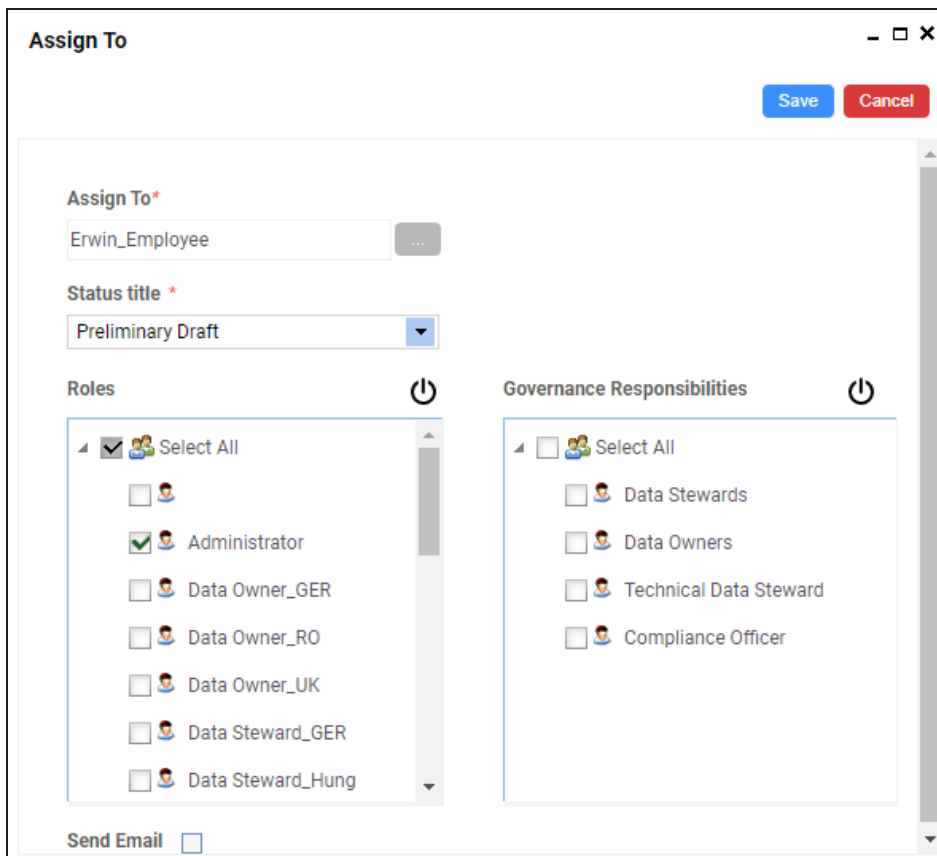
The Assign Object page appears.

Assigning Workflows to Business Policies



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

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

A form titled "Assign To" with a close button (X) in the top right corner. It contains two buttons, "Save" (blue) and "Cancel" (red), at the top right. Below them is a form with the following fields:

- Assign To***: A text input field containing "Erwin_Employee" and a dropdown arrow.
- Status title ***: A dropdown menu with "Preliminary Draft" selected.
- Roles**: A section with a power button icon. It contains a list of roles with checkboxes:
 - ☒ Select All
 - ☐ Administrator
 - ☐ Data Owner_GER
 - ☐ Data Owner_RO
 - ☐ Data Owner_UK
 - ☐ Data Steward_GER
 - ☐ Data Steward_Hung
- Governance Responsibilities**: A section with a power button icon. It contains a list of responsibilities with checkboxes:
 - ☐ Select All
 - ☐ Data Stewards
 - ☐ Data Owners
 - ☐ Technical Data Steward
 - ☐ Compliance Officer
- Send Email**: A checkbox.

You can update roles and roles group assigned to the first stage and select **Send Email** check box to send email notifications about the assignment. These notifications are

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.

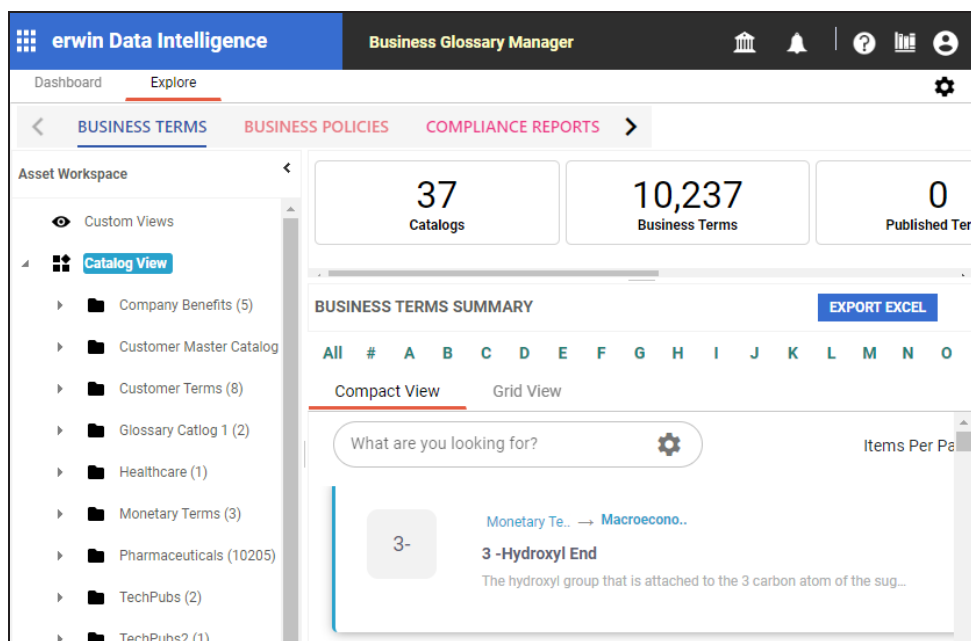
Once the workflow is assigned to the business policy, it can be executed via the Workflow Queue.

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:

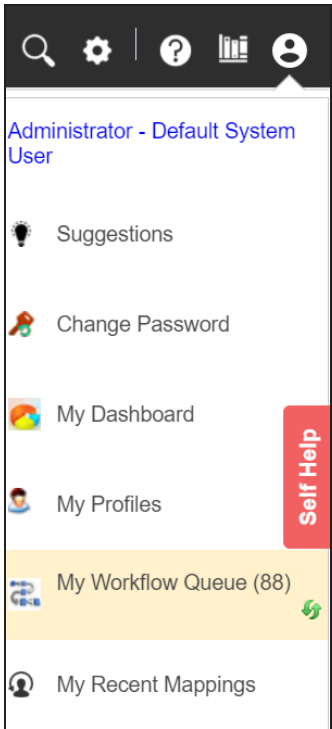
1. Go to **Application Menu > Data Literacy > Business Glossary Manager > Explore**.



Executing Workflows for Business Policies

2. Click .

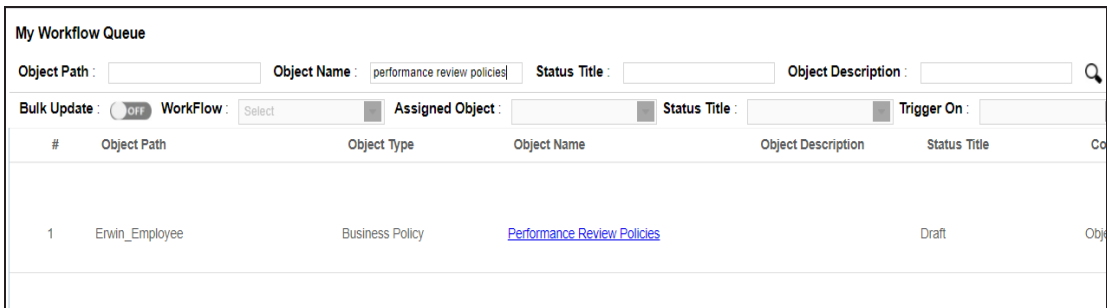
The available options appear.



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

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

The **<Business_Policy>** page appears.

The screenshot shows a web interface for "Performance Review Policies" under the user "Erwin_Employee". The page has a top navigation bar with links: "View Business Policy" (active), "Additional Information", "Associations", "Rich Media Library", "Collaboration Center", "Workflow Log", and "History". On the right, there are icons for edit, share, and delete. The main content area is divided into two columns. The left column, titled "Policy Details", contains a box labeled "Business Policy" with the text "Performance Review Policies". The right column contains a "Workflow Status" section with a dropdown menu currently set to "Preliminary Draft", and a "Governance Responsibilities" section with the text "No Assignments Found" in red.

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

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

The screenshot shows the "Workflow Status" dropdown menu. The current status is "Preliminary Draft". Below the dropdown, there is a green button labeled "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.

The screenshot shows a dialog box titled "Workflow Change Description". It has a blue header bar with a close button (X). The main area contains a text input field labeled "Comments" with a cursor. At the bottom right, there is a blue button labeled "SAVE & SEND".

Executing Workflows for Business Policies

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

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



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

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

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.

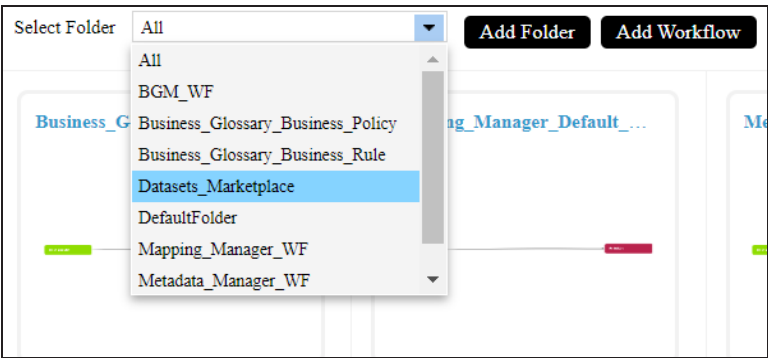
Before you assign workflows to datasets:

- 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' page. The page title is 'Assign Workflow (Draft One Primer → Dataset)'. There are two buttons at the top right: 'New Assignment' (blue) and 'Close' (red). Below the buttons is a table with the following columns: '#', 'Name', 'Created By', 'Created Date', 'Modified By', 'Modified Date', and 'Options'. The table contains two rows of data.

#	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.

The 'Assign To' dialog box is shown. It has a title bar with 'Assign To' and window controls. In the top right corner are 'Save' and 'Cancel' buttons. The main area contains two sections: 'Roles' and 'Governance Responsibilities'. Each section has a 'Select All' button and a list of roles with checkboxes. The 'Roles' list includes Administrator, Data Owner_GER, Data Owner_RO, Data Owner_UK, Data Steward_GER, and Data Steward_Hung. The 'Governance Responsibilities' list includes Data Stewards, Data Owners, Technical Data Steward, and Compliance Officer. At the bottom left is a 'Send Email' checkbox.

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

The Assign Object page appears.

The 'Assign Object' dialog box is shown. It has a title bar with 'Assign Object' and window controls. In the top right corner are 'Select' and 'Cancel' buttons. The main area displays a tree view of datasets under the 'Datasets' root. The tree includes folders for 'Config Datasets (5)', 'Dataset Control (7)', 'Enterprise Datasets (7)', 'Datasets Import (2)', 'Market State Data (2)', and 'Prime Info (1)'. The 'Dataset Control (7)' folder is highlighted with a blue background.

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 window titled "Assign To" with a close button (X) in the top right corner. Below the title bar are "Save" and "Cancel" buttons. The main content area has three sections: "Assign To" with a text field containing "Dataset Control" and a dropdown arrow; "Status title" with a dropdown menu showing "Draft"; and two lists: "Roles" and "Governance Responsibilities". The "Roles" list has a "Select All" option and seven roles, each with a checkmark icon: Administrator, Data Owner_GER, Data Owner_RO, Data Owner_UK, Data Steward_GER, and Data Steward_Hung. The "Governance Responsibilities" list also has a "Select All" option and four responsibilities, each with a checkmark icon: Data Stewards, Data Owners, Technical Data Steward, and Compliance Officer.

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.

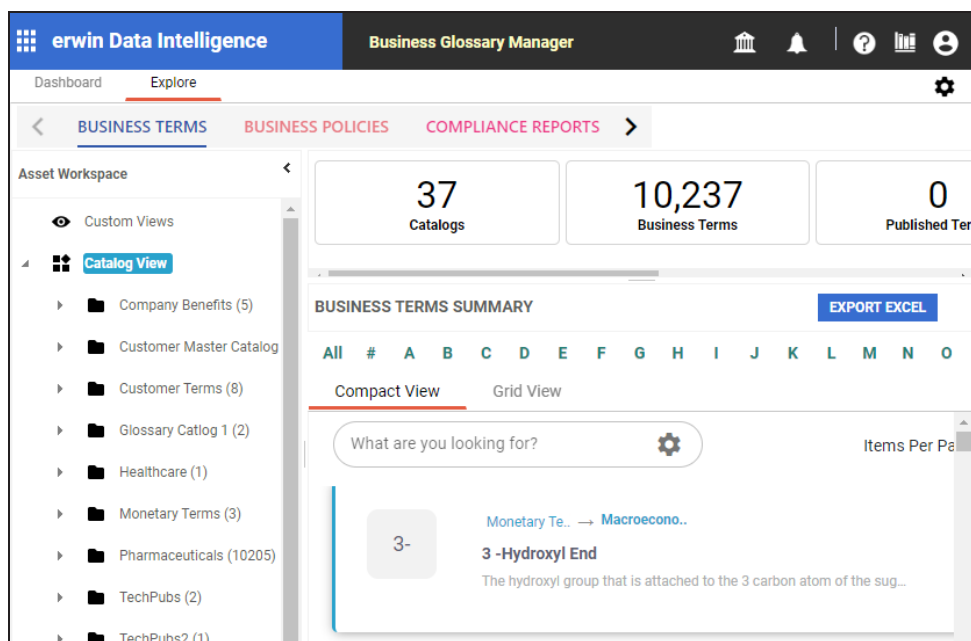
Executing workflows involves:

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

To execute workflows for the datasets, follow these steps:

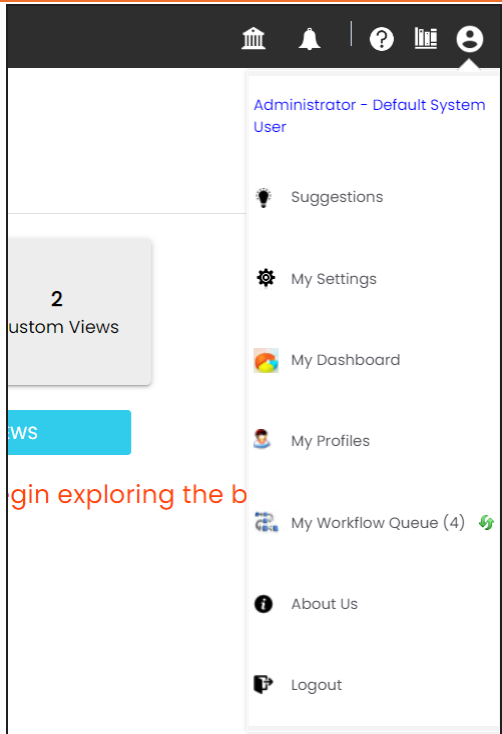
1. Go to **Application Menu > Data Marketplace > Datasets > Explore**.

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.

My Workflow Queue								
Object Path :		Object Name :		Status Title :		Object Description :		
Bulk Update : ☐ OFF		Workflow : Select		Assigned Object :		Status Title :		Trigger On :
#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Market State Data	Dataset	Tele Info Records	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	Install Configurations		Draft	Object created and moved to Draft	Administrator	10-05-2023 13:18:37
3	Config Datasets	Dataset	Component Connectors	Contains connector details and references.	Draft	Object created and moved to Draft	Administrator	10-05-2023 13:19:37
4	Config Datasets	Dataset	Inter Infer Datasets		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

- Click the <Object_Name> appearing as a hyperlink.

The dataset summary page appears.

The screenshot shows a dataset summary page for 'Tele Info Records' with the subtitle 'Market State Data'. At the top right, there is an 'ADD TO COMPARE' button and icons for edit, settings, share, delete, and close. Below the header, there are four cards: 'Data Value Score' (NONE), 'Workflow Status' (Draft), 'Rating' (5 stars), and 'Rich Media Library' (0). The main content area is divided into two sections: 'Asset Information' and 'Related Assets (Associations)'. The 'Asset Information' section includes a 'Definition' and a 'Description', both stating: 'Information related to electromagnetic conduction between devices in a workplace section.'

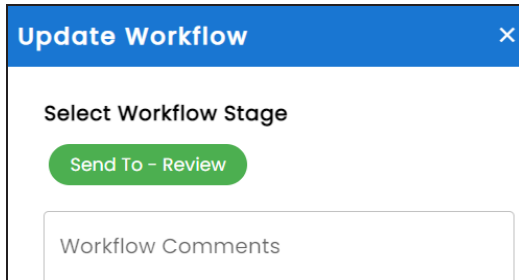
- Hover over the Workflow Status card and click  to edit.

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

The 'Update Workflow' dialog box has a blue header with a close button. It contains a 'Select Workflow Stage' section with a 'Send To - Review' button. Below this is a 'Workflow Comments' text area. At the bottom right, there is a 'SAVE & SEND' button.

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.