

GUIDE

erwin Data Intelligence

Workflow Management Guide 15.0



Legal Notices

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

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

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

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

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

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

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

Contact erwin

Understanding your Support

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

Registering for Support

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

Accessing Technical Support

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

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

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

Provide Feedback

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

News and Events

Visit [News and Events](#) to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

Contents

Workflow Manager	7
Adding Folders	9
Edit Folders	10
Delete Folders	10
Adding Workflows	12
Edit Workflows	14
Delete Workflows	15
Configuring Workflows	17
Creating Stages	17
Adding Stages to Workflows	19
Deleting Stages	21
Managing Stages	23
Managing Mapping Manager Workflows	27
Assigning Workflows to Projects	28
Executing Workflows	33
Managing Metadata Manager Workflows	37
Assigning Workflows to Environments	38
Executing Workflows for Environments	42
Assigning Workflows to Tables	46
Executing Workflows for Tables	50
Assigning Workflows to the Columns	54
Executing Workflows for Columns	58

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

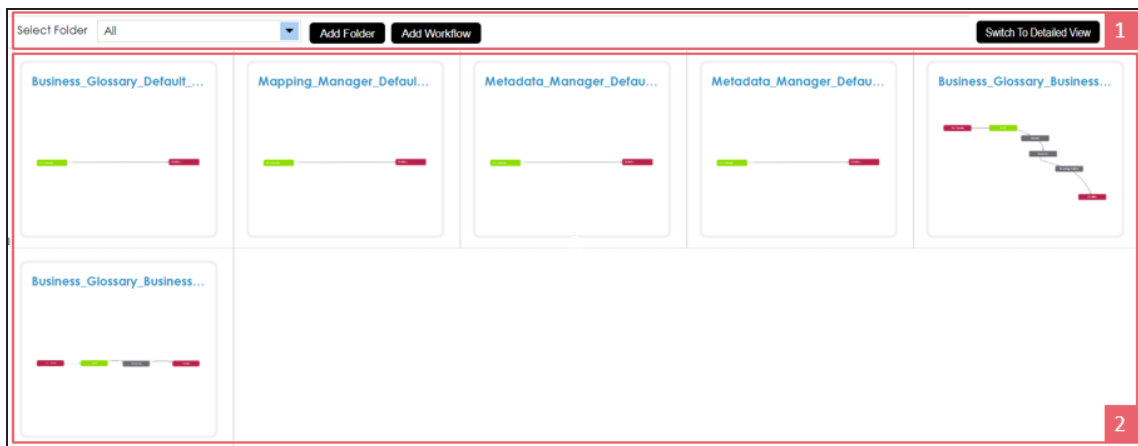
Workflow Manager

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.

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 workflows](#)
- [Configuring workflows](#)
- [Managing mapping manager workflows](#)
- [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.



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

For example:

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

4. Click **Save**.

The new folder is created.

Once a folder is created, you can:

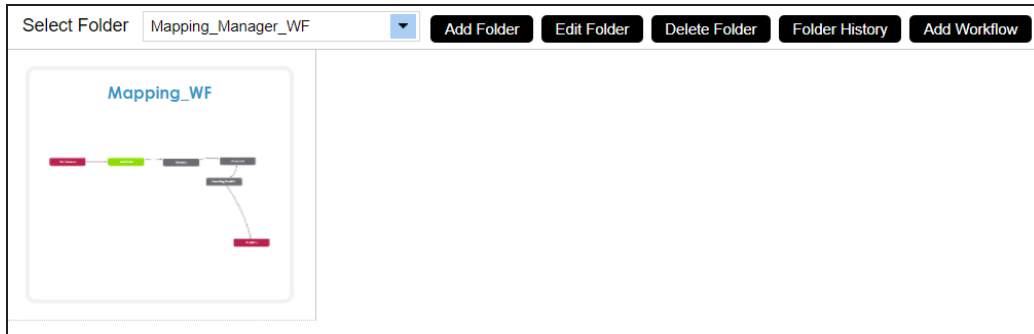
- [Add workflows](#)
- [Edit folders](#)
- [Delete folders](#)

Edit Folders

To update a folder information, follow these steps:

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

The Edit Folder page appears, and update necessary fields.



3. Click **Save**.

Delete Folders

To delete a folder, follow these steps:

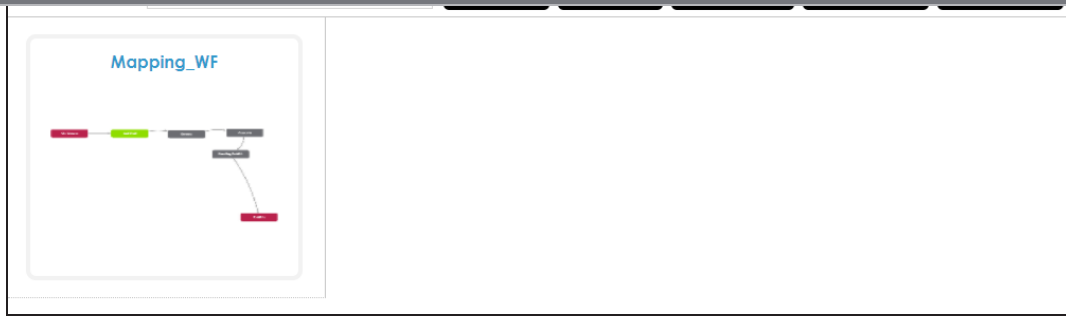
1. In the utility pane, select a folder.
2. Click **Delete Folder**.

A warning message appears.



Deleting a folder also deletes the workflows in it.

Adding Folders



3. Click **Yes**.
The folder is deleted.



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

Adding Workflows

You can create workflows and add them to a folder.

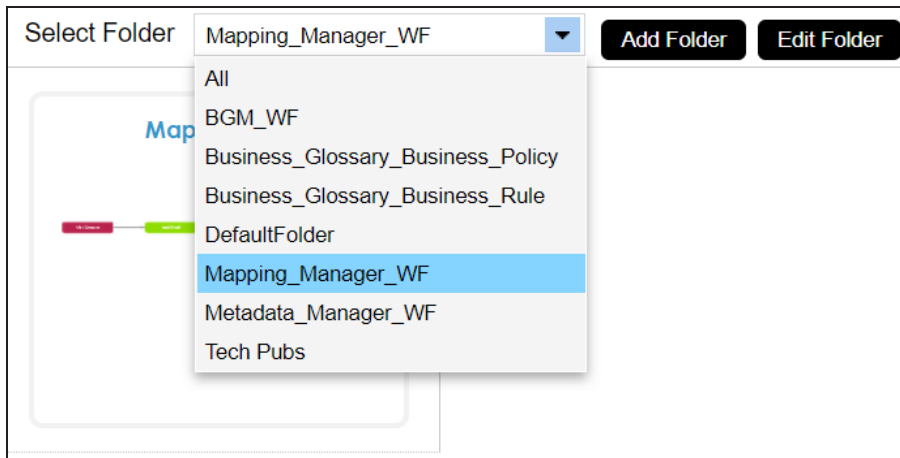
These workflows can be triggered automatically based on the requirements for:

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

To add workflows, follow these steps:

1. On the **Workflow Manager** page, select a folder in the utility pane.

You can add workflows to the selected folder.



2. Click **Add Workflow**.

The Add Workflow page appears.

Folder *

Mapping_Manager_WF

Save

Cancel

Module *

Select

Object *

Trigger Type *

Name *

Description











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

Adding Workflows	
Name	Description
	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:

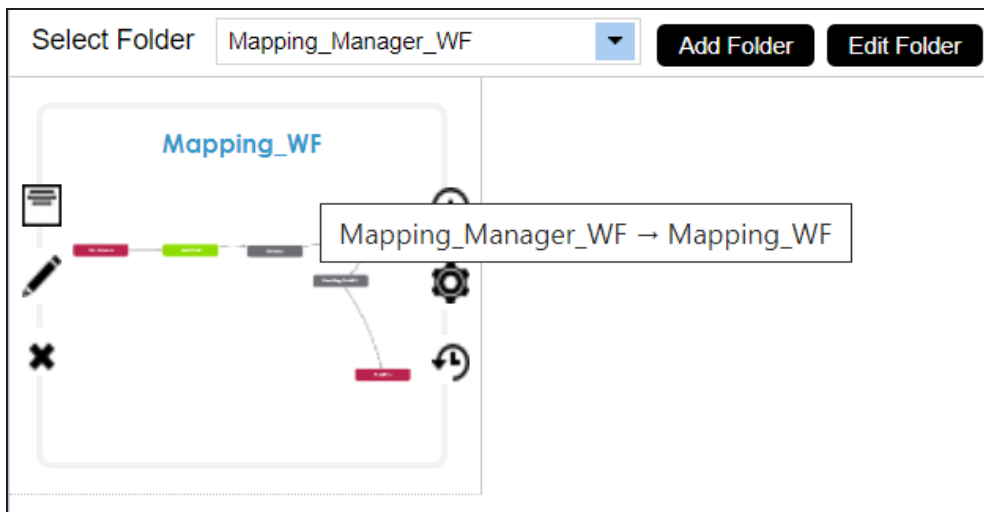
- [Configure workflows](#)
- [Edit workflows](#)
- [Delete workflows](#)

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.

Adding Workflows



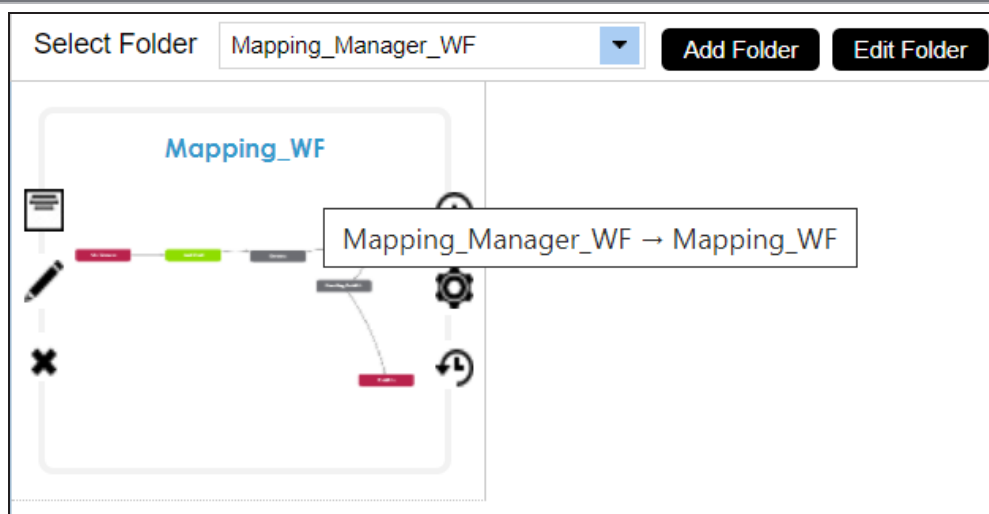
3. Click  .
The Edit Workflow page appears.
4. Click the **Folder** drop-down to choose a different folder for the workflow.
5. Update other necessary fields and click **Save**.
The workflow is updated.

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.

Adding Workflows



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

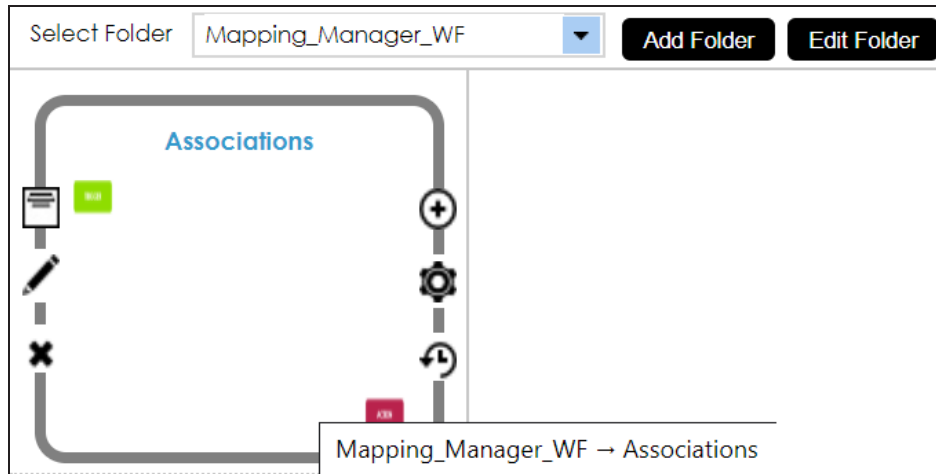
Configuring Workflows

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

Creating Stages

To create stages, follow these steps:

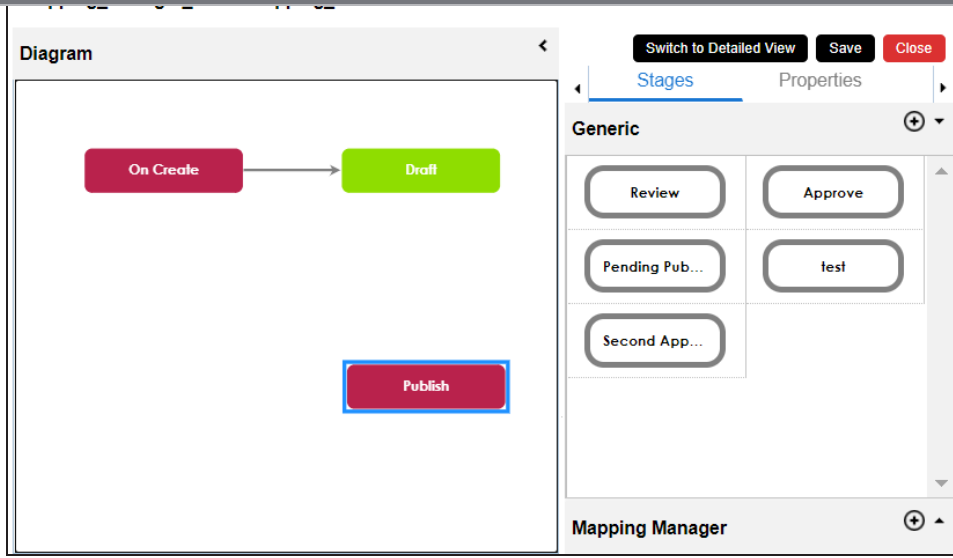
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.
The workflow pane displays a list of workflows.
3. Hover over a workflow.



4. Click .

The following page appears. By default, the first stage name and status, both are set to Draft. You can configure the first stage name and status as per your requirements. For more information on configuring the first stage, refer to the [Configuring Workflow Settings](#) topic.

Configuring Workflows



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

The Add Stage page appears.

The 'Add Stage' form is displayed. It has a title bar with a close button. The form contains three fields: 'Name *' with a text input field and a red error message 'Stage Name is a required field'; 'Status title *' with a text input field and a red error message 'Status title is a required field'; and 'Description' with a rich text editor. The rich text editor has a toolbar with icons for bold, italic, underline, list, and link. At the top right of the form 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**.

Add Stage

Previous Save Cancel

Select Roles :

- ☐ Select All
- ☐ Administrator
- ☐ Data Owner_GER
- ☐ Data Owner_RO
- ☐ Data Owner_UK
- ☐ Data Steward_GER
- ☐ Data Steward_Hung
- ☐ Data Steward_RO
- ☐ Data Steward_UK
- ☐ ETL Developer
- ☐ Mapping_Tester
- ☐ Mapping Admin
- ☐ Mapping Designer
- ☐ Old_DataSteward

Select Governance Responsibilities:

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



The Select Governance Responsibilities section does not appear for map-
ping manager and metadata Manager workflows.

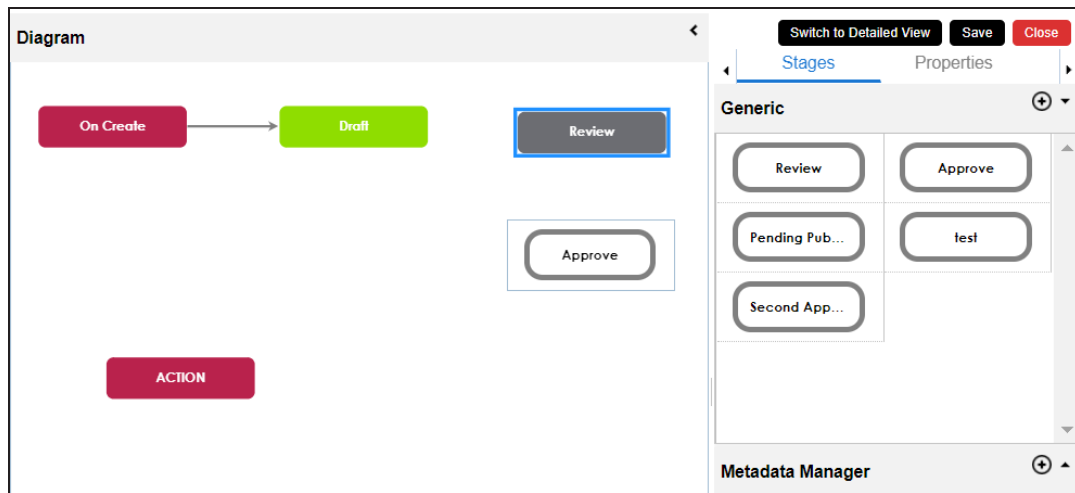
8. Select the required roles and roles groups.
9. Click **Save**.

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

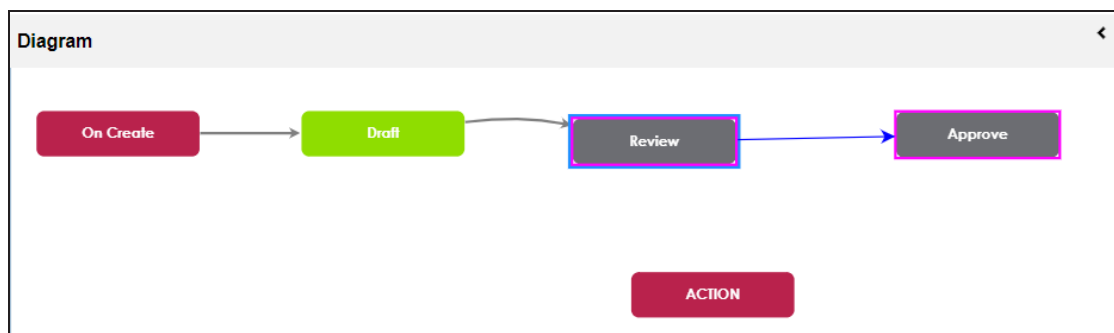
Adding Stages to Workflows

To add generic stages to workflows, follow these steps:

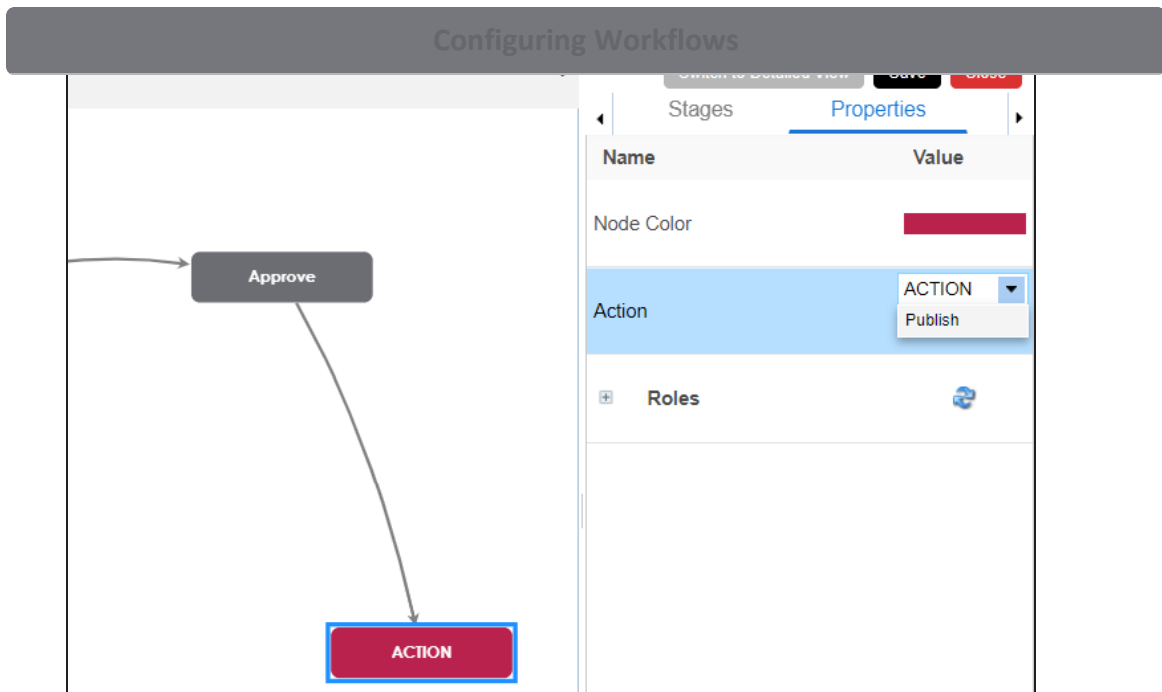
Configuring Workflows



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**.



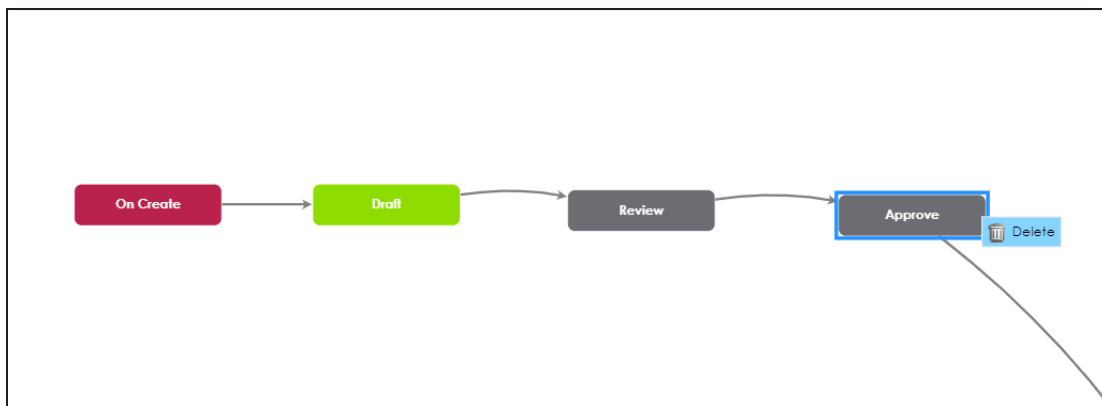
5. Expand the **Roles** node and select appropriate roles.
6. Click **Save**.

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.



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.

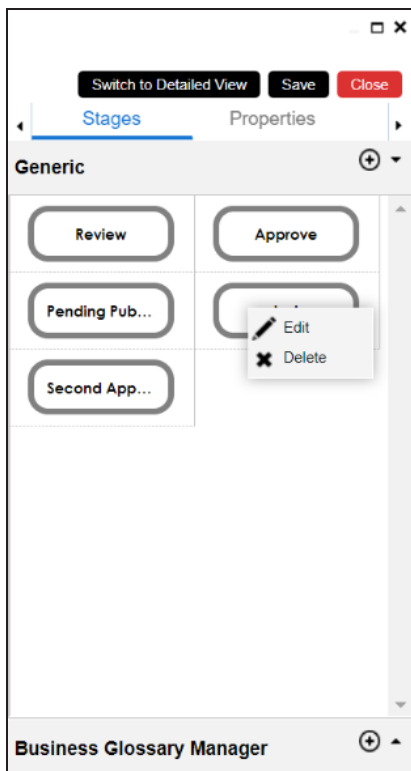
Managing Stages

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

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

Edit Stage

Next Cancel

Name *

Review

Stage Name is a required field

Status title *

Pending Review

Status title is a required field

Description

Review

Click **Next**.

You can update the roles assigned to the stage.

Managing Stages

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.

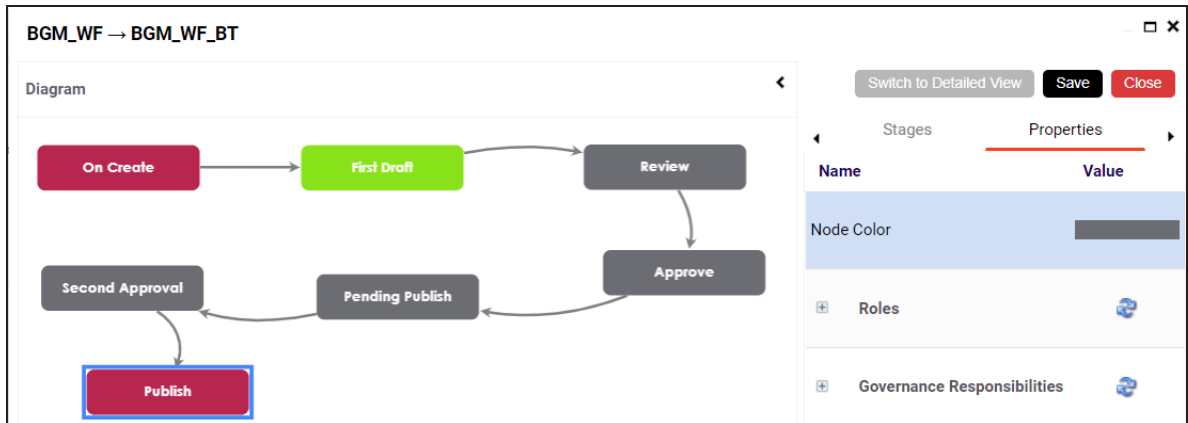
Delete

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



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.

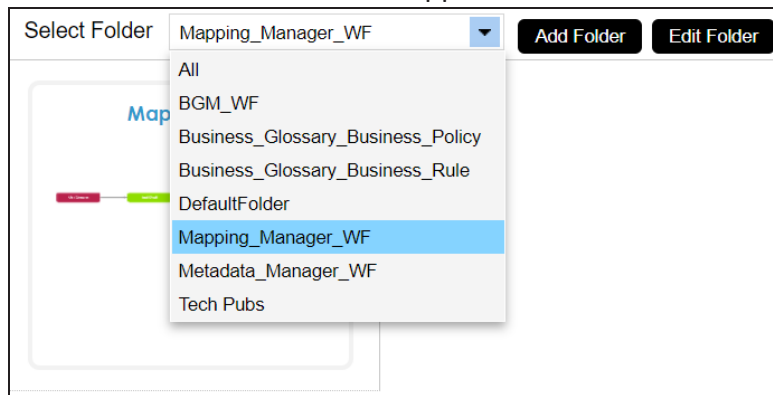
Before you assign workflows to a project:

- 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:

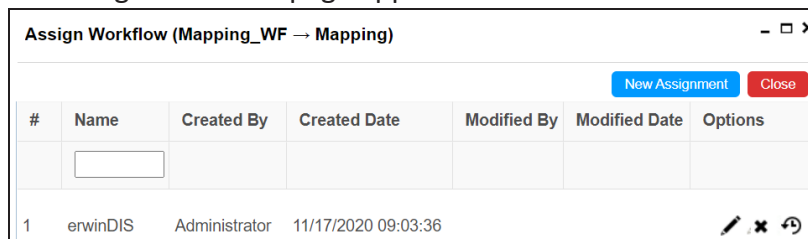
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. On the **Workflow Manager** page, select a folder.

All the workflows in the folder appears.



3. Hover over the required workflow, and click .

The Assign Workflow page appears.



The Assign To page appears.

Assign To

Save Cancel

Assign To *

Status title *

Draft

Roles

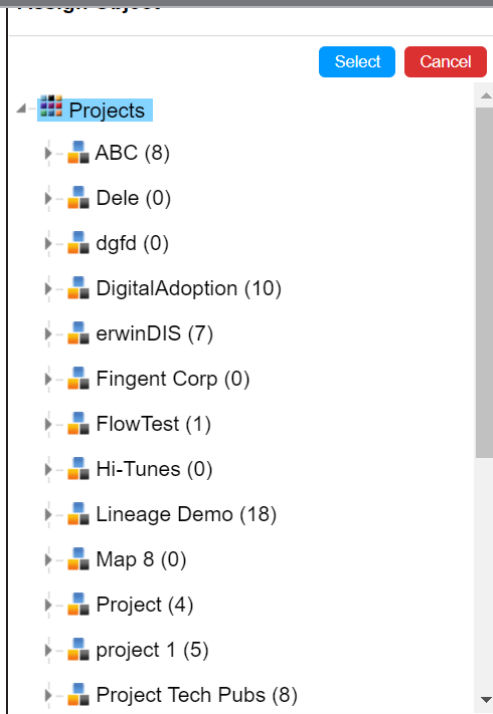
☒ Select All
☐
☐ Administrator
☐ Data Owner_GER
☐ Data Owner_RO
☐ Data Owner_UK
☐ Data Steward_GER
☐ Data Steward_Hung

Send Email ☐

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.

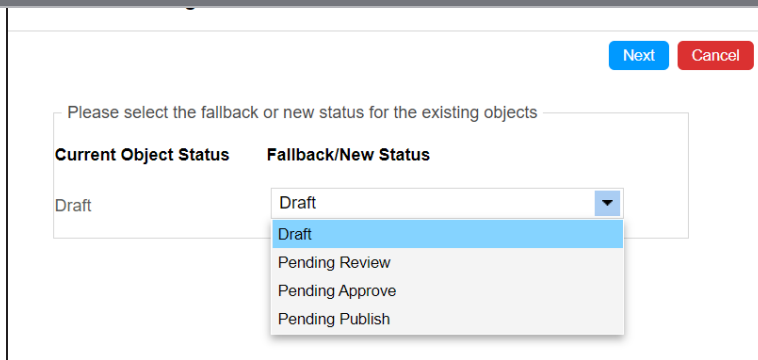
7. Click **Yes**.

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



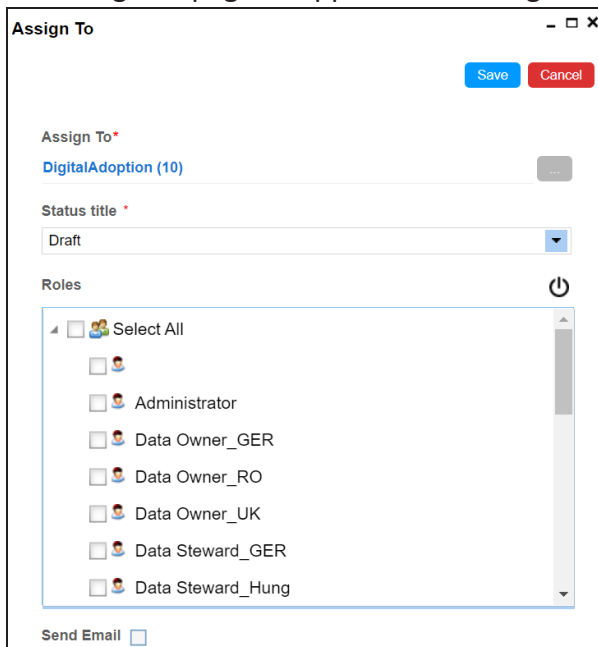
8. Select an appropriate **Fallback/New Status**.

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

9. Click **Next**.

10. Enter comments, and click .

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



You can update roles assigned to the new fall back stage and select **Send Email** check box to send email notifications about the assignment. These notifications are sent

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

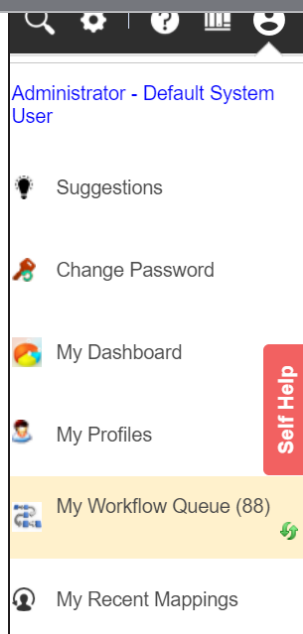
To execute workflows for the mappings in the Mapping Manager, follow these steps:

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

The Mapping Manager page appears.

#	Project Name	Project Description	Project Owner	Subj Cour	Map Cour	Created By	Created Date Time	Last Modified By	Last Modified Date Time
1	Lineage Demo			0	14	Administratc	26-02-2020 04:01:32	Administratc	26-02-2020 04:01:32
2	Test Source			0	3	Administratc	26-02-2020 04:02:38	Administratc	26-02-2020 04:02:38
3	TestData Map			0	30	Administratc	26-02-2020 04:03:32	Administratc	26-02-2020 04:03:32
4	TestMap			0	5	Administratc	26-02-2020 04:04:19	Administratc	26-02-2020 04:04:19

2. Click .



3. Click **My Workflow Queue**.

The My Workflow Queue page appears showing workflow queues.

My Workflow Queue						
Object Path :		Object Name :		Status Title :	Object Description :	
Bulk Update : ☐ 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

Object Path :		Object Name : Erwin		Status Title :		Object Description :		Search Refresh	
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	erwinDIS	Mapping	erwinSalesIntegration		Draft	Assigning new workflow.			
2	Project Tech Pubs	Mapping	erwinSalesIntegration		Draft	Object created and moved to Draft			

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

The Map View page appears.

Map View

Map Spec Overview

Map Spec Grid

Source Extract Sql

Target Update Strategy

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

☒

Sync Target Metadata

☒

Job Name XRef

Mapping Description

Assigned To

Created By

Administrator

Created Date Time

2020-05-19 08:49:28.127

Modified By

ksridhar

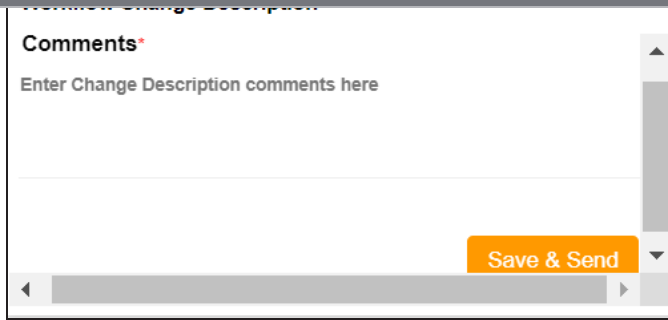
Modified Date Time

2020-10-14 08:02:07.943

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

The Workflow Change Description page appears.

Executing Workflows



Comments

Enter Change Description comments here

Save & Send

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

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



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

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.

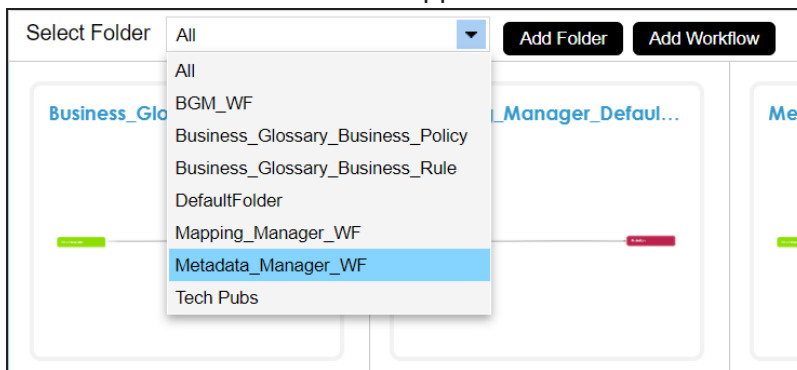
Before you assign workflows to an environment:

- 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

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

3. Click **New Assignment**.

The Assign To page appears.

Assign To

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

Assign To*

Status title *

Draft

Roles

☒ Select All

☐ Administrator

☐ Data Owner_GER

☐ Data Owner_RO

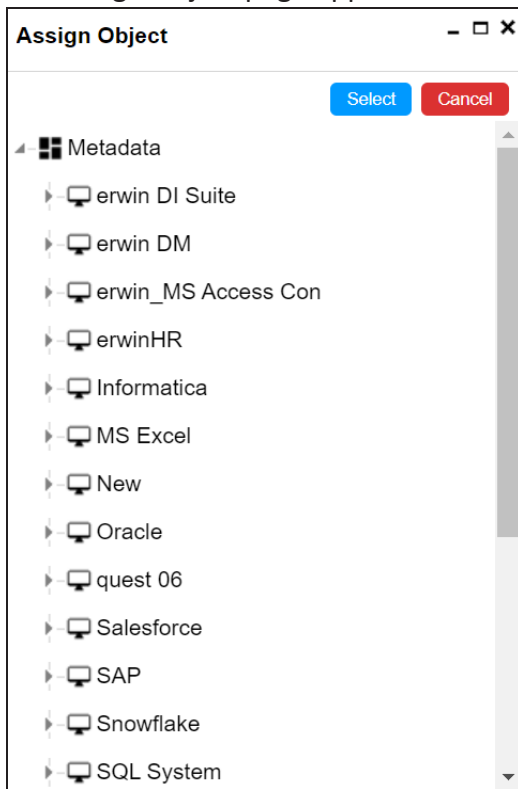
☐ Data Owner_UK

☐ Data Steward_GER

☐ Data Steward_Hung

Send Email ☐

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.

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.

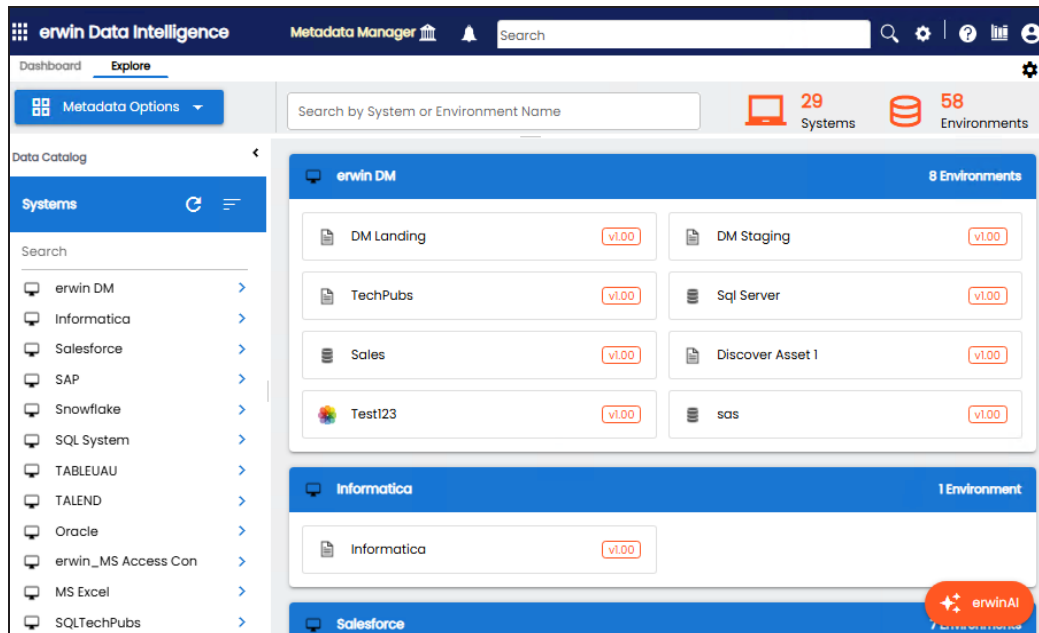
Executing workflows involves:

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

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

- 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	Comm
1	erwin DM	Environment	Sql Server Production		Draft	Object c

- Click the required <Object Name> which appears as hyperlink.
The Environment View page appears.

Executing Workflows for Environments

Environment Details Extended Properties

Configuration Details Miscellaneous

Status: **Draft**

System Environment Name*: **Sql Server Production**

System Environment Type: **Sql Server**

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:

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

DBMS Name/DSN*: **Northwind**

IP Address/Host Name*: **localhost**

Port: **1433**

User Name*: **sa**

Password*:

Url*:

DBMS Instance Schema: **dbo**

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.



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.

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.

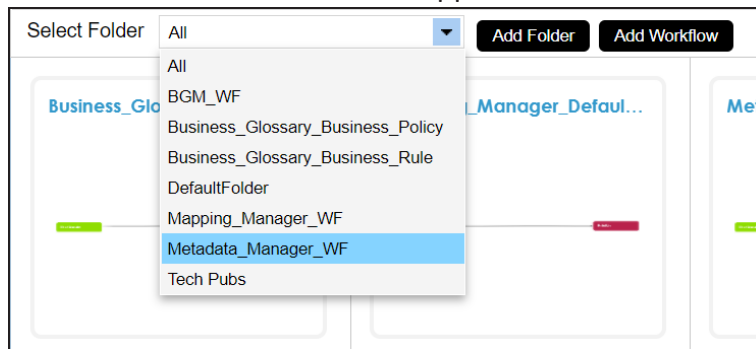
Before you assign workflows to tables:

- 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)						
					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			  

The Assign To page appears.

Assign To

Save Cancel

Assign To*

Status title *

Draft

Roles

☒ Select All

☐ Administrator

☐ Data Owner_GER

☐ Data Owner_RO

☐ Data Owner_UK

☐ Data Steward_GER

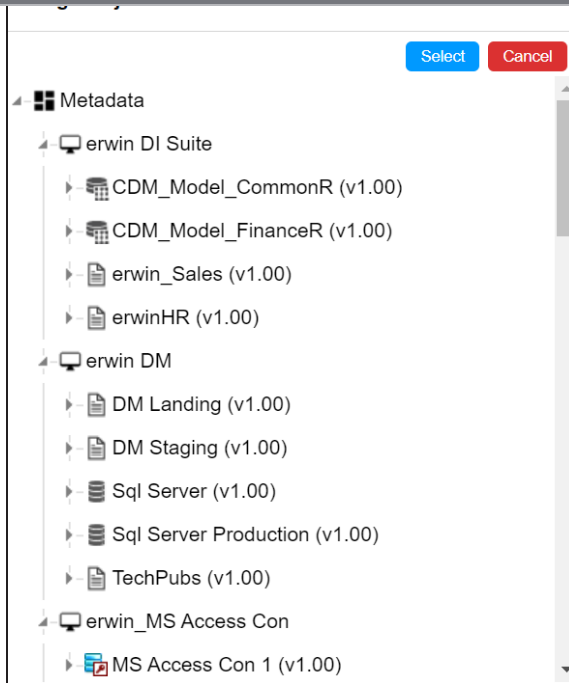
☐ Data Steward_Hung

Send Email ☐

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

The Assign Object page appears.

Assigning Workflows to Tables

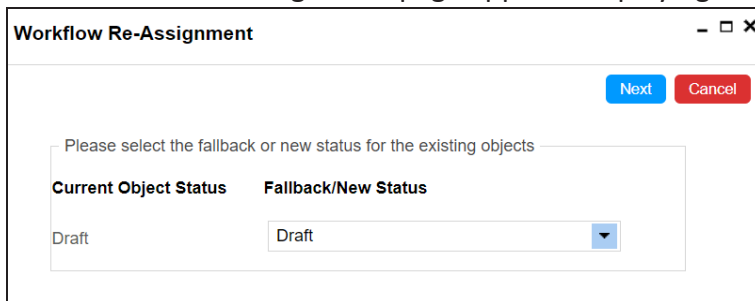


5. Click an Environment containing with required table.
6. Click **Select**.

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

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

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



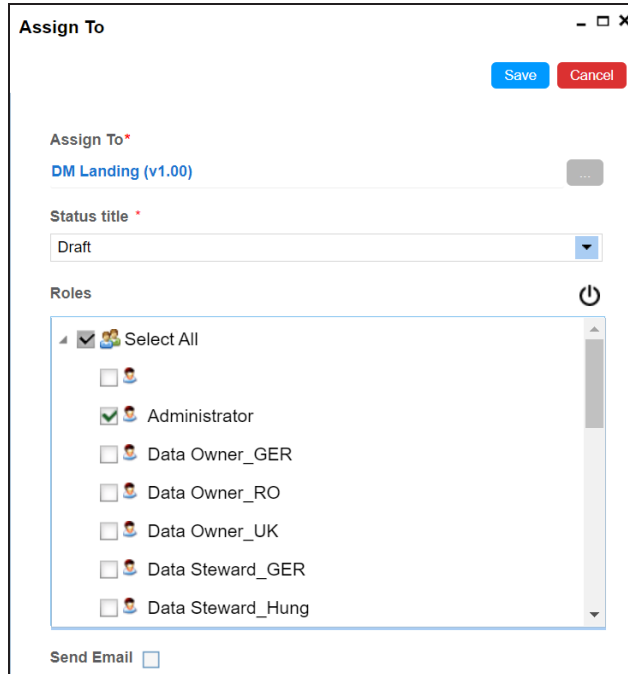
8. Select the appropriate Fallback/New Status.

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

9. Click **Next**.

10. Enter relevant comments, and click .

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



Assign To

Save Cancel

Assign To *

DM Landing (v1.00)

Status title *

Draft

Roles

☒ Select All

☐ Administrator

☐ Data Owner_GER

☐ Data Owner_RO

☐ Data Owner_UK

☐ Data Steward_GER

☐ Data Steward_Hung

Send Email ☐

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.

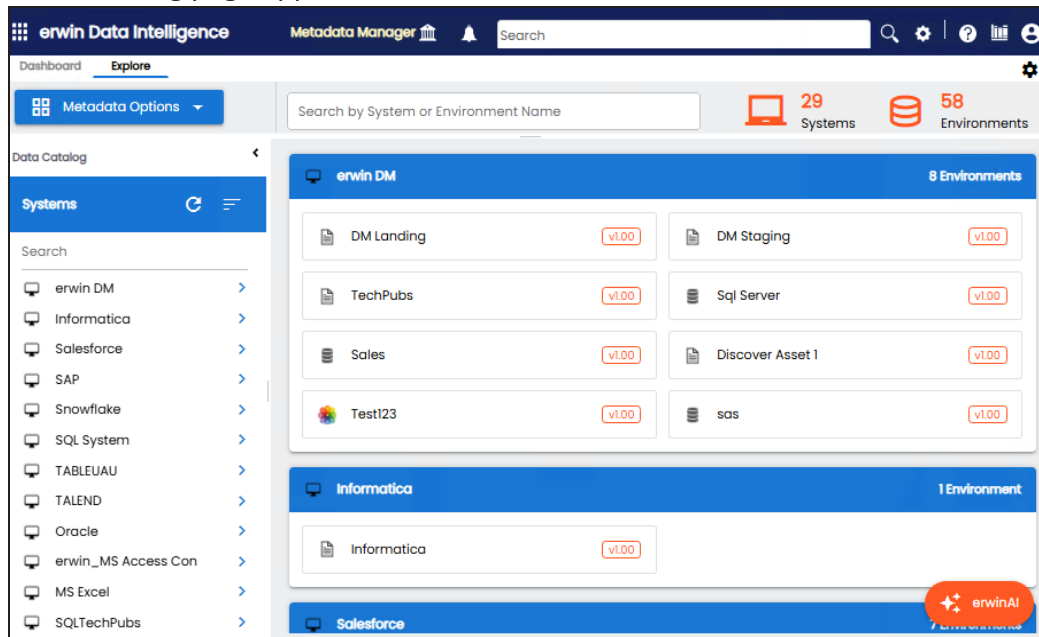
Executing workflows involves:

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

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	EmployeeeID		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

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

The search results are displayed.

My Workflow Queue

Object Path :

Object Name :

Status Title :

Object Definition :



Bulk Update : ☐ Off

Workflow :

Assigned Object :

Status Title :

Trigger On :

#	Object Path	Object Type	Object Name	Object Definition	Status Title	Comments	Assigned By	Assigned Date
1	erwin DM/DM Landing	Table	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

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

The Table View page appears.

Executing Workflows for Tables

Send To - Review

Properties
Extended Properties

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	

6. 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

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

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



Each stage in the workflow is assigned to different roles. For example, if the Draft stage in the workflow was assigned to Mapping Admin role

Executing Workflows for Tables



then, the users with the Mapping Admin role receive the work queue notification.

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

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

Assigning Workflows to the Columns

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

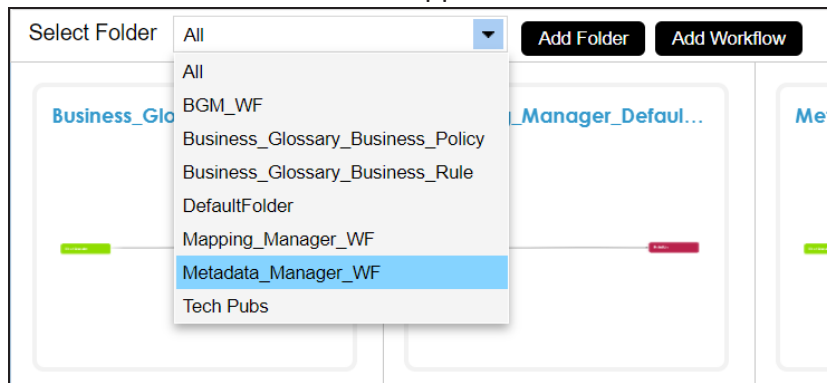
Before you assign workflows to columns:

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

To assign workflows to columns, follow these steps:

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

All the workflows in the folder appear.



2. Hover over the required workflow and click .

The Assign Workflow page appears.

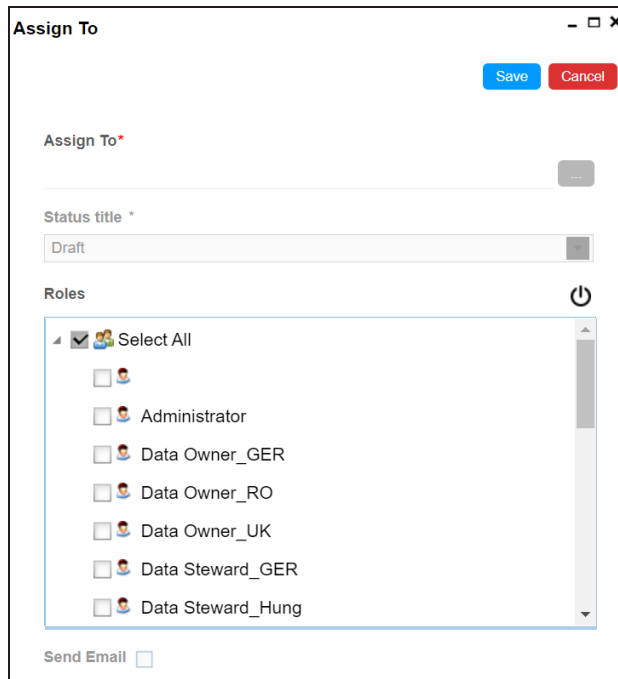
Assign Workflow (Metadata_MGR_Column → Column)

New Assignment
Close

#	Name	Created By	Created Date	Modified By	Modified Date	Options

3. Click **New Assignment**.

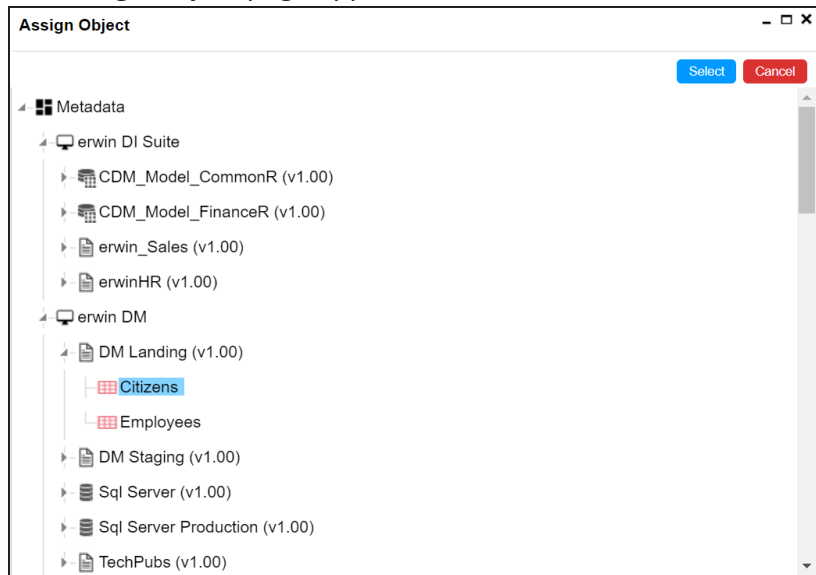
Assigning Workflows to the Columns



The 'Assign To' dialog box is shown. It has a title bar with standard window controls. At the top right are 'Save' and 'Cancel' buttons. Below the title bar is the 'Assign To*' field with a dropdown arrow. Underneath is the 'Status title *' field with a dropdown arrow, currently showing 'Draft'. Below that is the 'Roles' section with a power icon. It contains a list of roles: 'Select All' (checked), 'Administrator', 'Data Owner_GER', 'Data Owner_RO', 'Data Owner_UK', 'Data Steward_GER', and 'Data Steward_Hung'. At the bottom is a 'Send Email' checkbox.

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

The Assign Object page appears.

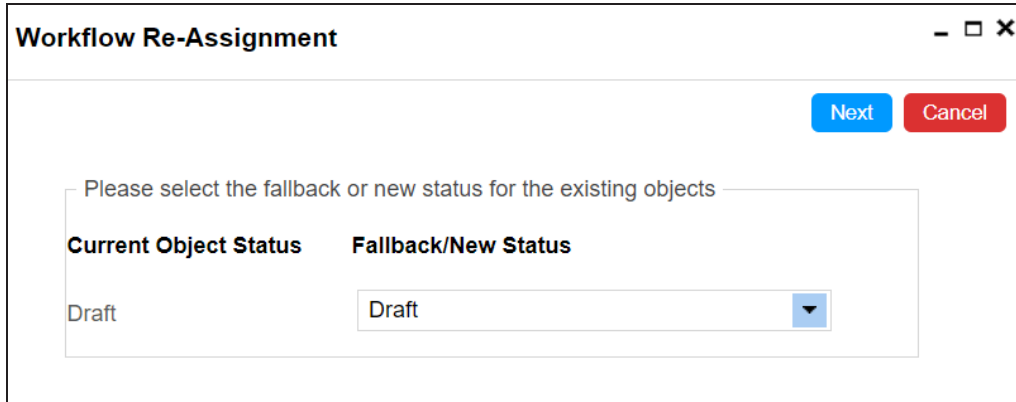


The 'Assign Object' dialog box is shown. It has a title bar with standard window controls. At the top right are 'Select' and 'Cancel' buttons. Below the title bar is a tree view under the 'Metadata' folder. The tree view shows the following structure: 'erwin DI Suite' (expanded) containing 'CDM_Model_CommonR (v1.00)', 'CDM_Model_FinanceR (v1.00)', 'erwin_Sales (v1.00)', and 'erwinHR (v1.00)'; 'erwin DM' (expanded) containing 'DM Landing (v1.00)' (expanded) with 'Citizens' and 'Employees' selected, 'DM Staging (v1.00)', 'Sql Server (v1.00)', 'Sql Server Production (v1.00)', and 'TechPubs (v1.00)'.

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

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

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



Workflow Re-Assignment

Next Cancel

Please select the fallback or new status for the existing objects

Current Object Status	Fallback/New Status
Draft	Draft

- Select the appropriate Fallback/New Status.

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

- Click **Next**.

The Comments page appears.

- Enter relevant comments, and click .

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

Assigning Workflows to the Columns

Assign To*

Citizens

Status title *

Draft

Roles

☒ Select All

☐ Administrator

☒ Data Owner_GER

☐ Data Owner_RO

☐ Data Owner_UK

☐ Data Steward_GER

☐ Data Steward_Hung

Send Email ☐

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

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

11. Select the appropriate **Roles**.

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

13. Click **Save**.

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

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

Executing Workflows for Columns

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

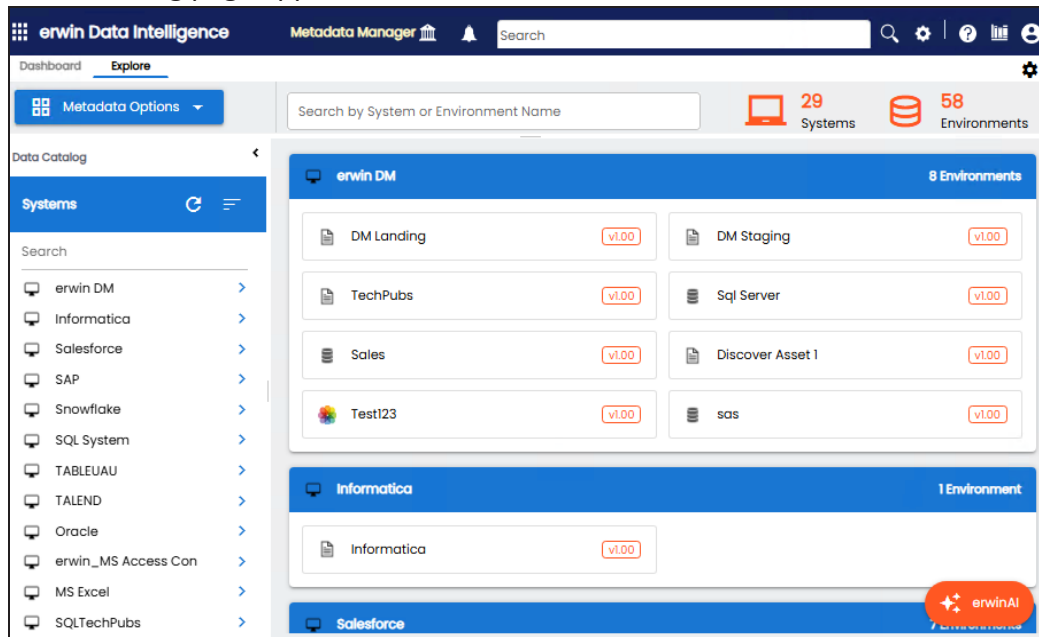
Executing workflows involves:

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

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

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

The following page appears.



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

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	EmployeeeID		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

- 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

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

The Column View page appears.

Executing Workflows for Columns

Column view

Properties Extended Properties

Technical Properties

Name	CitizenID	Data Type	
Data Domain		Storage Type	
Precision		Length	
DB Default Value		Scale	
Nullable Flag	☒	Identity Flag	☐
Natural Key Flag	☐	Percent Null Value	0
Foreign Key Flag	☐	Primary Key Flag	☒
Foreign Key Column Name		Foreign Key Table Name	
Minimum Value		ETL Default Value	
File Starting Position		Maximum Value	
Attribute Type	ENTITY_ELEMENT		
Workflow Status	Draft		

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.

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.

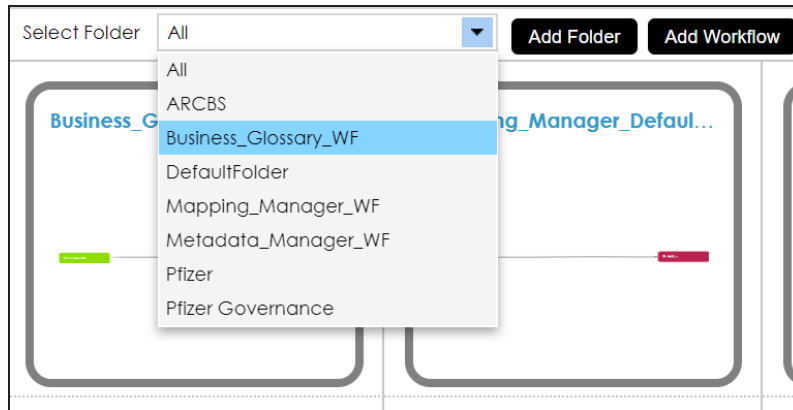
Before you assign workflows to business terms:

- 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_Stage, 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			

- 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

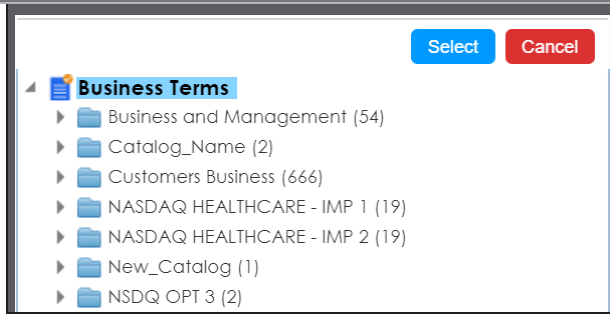
- ☐ Data Stewards
- ☐ Data Owners
- ☐ Technical Data Steward
- ☐ Compliance Officer

Send Email ☐

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

The Assign Object page appears.

Assigning Workflows to Business Terms

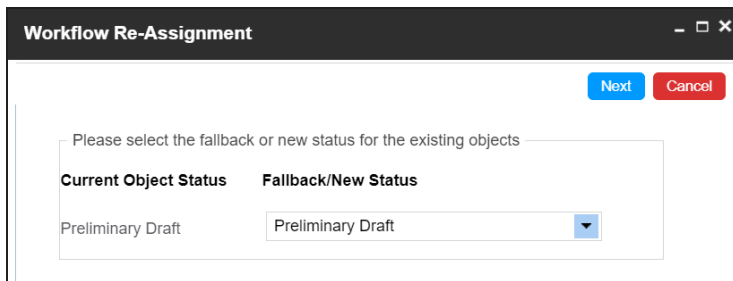


6. Select a catalog and click **Select**.

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.

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.

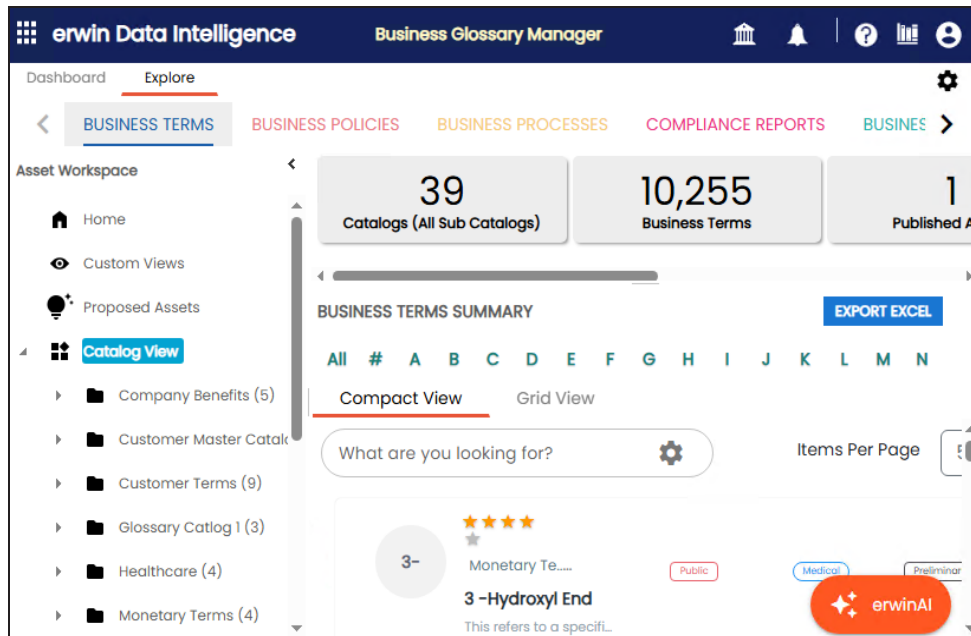
Executing workflows involves:

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

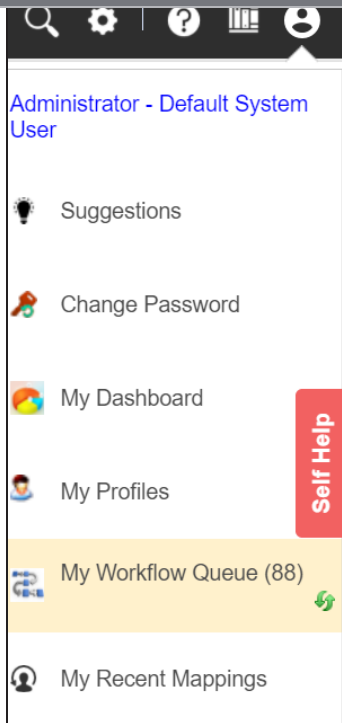
To execute workflows for the business terms, follow these steps:

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

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
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

Object Path : Object Name : Status Title :

Bulk Update : ☐ OFF WorkFlow : 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
☐ Acronym

Business Term
 CUSTOMER

Definition
 a person who buys your product

Workflow Status
Pending Review

Governance Responsibilities

Data Stewards
 Mike Mannigan
Mike Menza

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

workflow.

Workflow Status
Pending Review
^

Back To - Preliminary Draft

Send To - Approve

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

The Workflow Change Description page appears.

Workflow Change Description
X

Comments

SAVE & SEND

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

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



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

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.

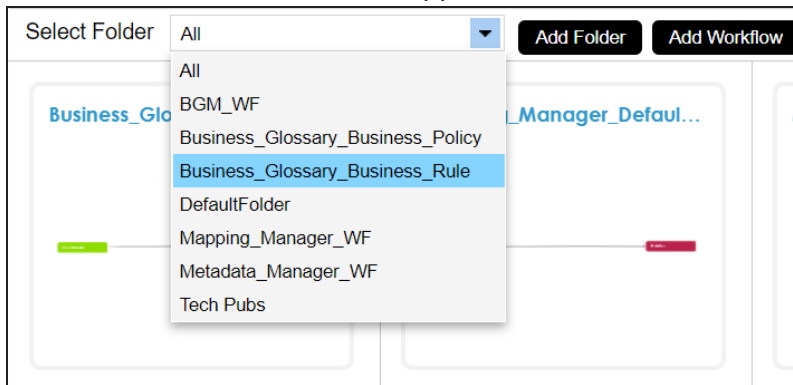
Before you assign workflows to business rules:

- 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

Assigning Workflows to Business Rules						
#	Name	Created By	Created Date	Modified By	Modified Date	Options
1	TechPubs	Administrator	04/10/2020 07:43:44			  

- Click **New Assignment**.

The Assign To page appears.

Assign To

Save

Cancel

Assign To*

Status title *

Preliminary Draft

Roles

☒ Select All

☐ Administrator

☒ Administrator

☐ Data Owner_GER

☐ Data Owner_RO

☐ Data Owner_UK

☐ Data Steward_GER

☐ Data Steward_Hung

Governance Responsibilities

☐ Select All

☐ Data Stewards

☐ Data Owners

☐ Technical Data Steward

☐ Compliance Officer

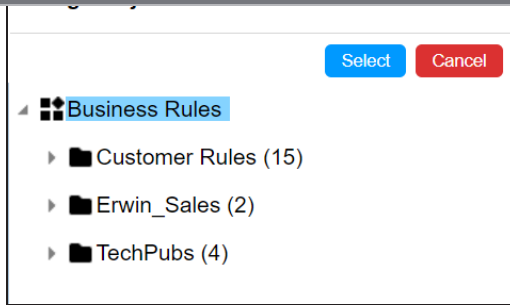
Send Email

☐

- 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.

A screenshot of the "Assign To" page. It has a title bar with "Assign To" and window controls. At the top right are "Save" and "Cancel" buttons. The main area contains:

- "Assign To*" field with "Customer Rules" and a dropdown arrow.
- "Status title *" dropdown menu with "Preliminary Draft" selected.
- "Roles" section with a power icon and a list of roles: "Select All" (checked), "Administrator" (checked), "Data Owner_GER", "Data Owner_RO", "Data Owner_UK", "Data Steward_GER", and "Data Steward_Hung".
- "Governance Responsibilities" section with a power icon and a list of responsibilities: "Select All" (unchecked), "Data Stewards", "Data Owners", "Technical Data Steward", and "Compliance Officer".
- "Send Email" checkbox at the bottom left.

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**.

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.

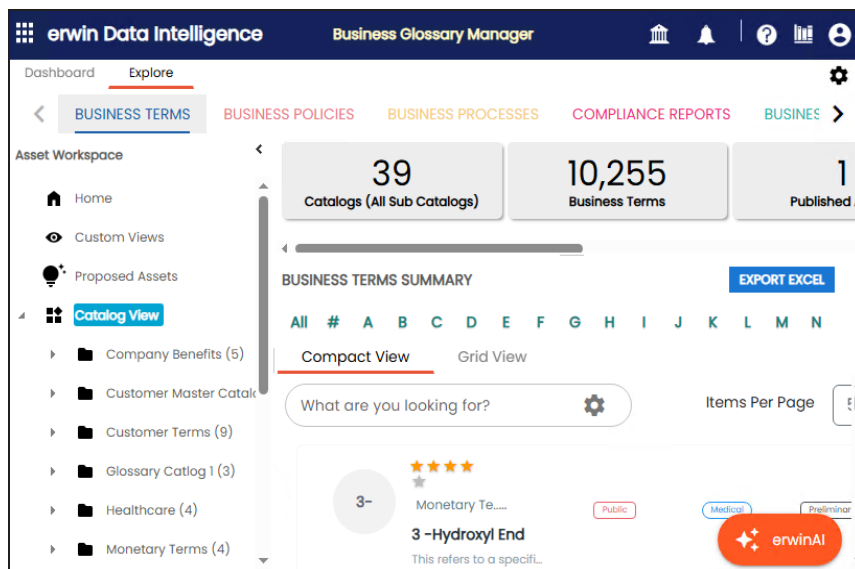
Executing workflows involves:

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

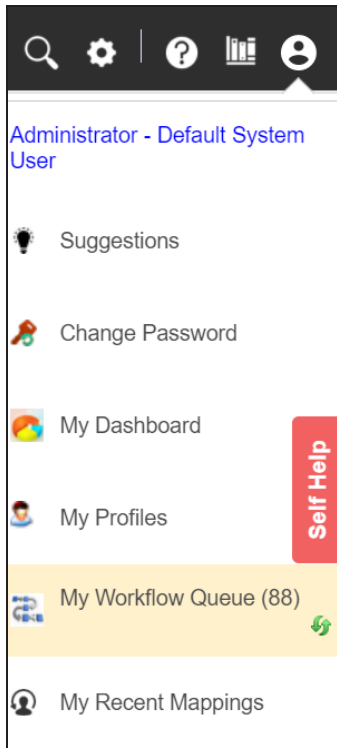
Once the workflow is assigned to the business rule, it can be executed via the Workflow Queue.

To execute workflows for business rules, follow these steps:

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



2. Click .



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	Con
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

Erwin_Sales

[View Business Rule](#) Associations Rich Media Library WorkFlow Log History

Rule Details

Business Rule
Respect time

Definition
"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."

Workflow Status Preliminary Draft

Governance Responsibilities
No Assignments Found

Classification
☐ 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.

Workflow Status Preliminary Draft

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.

Workflow Change Description

Comments

SAVE & SEND

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.

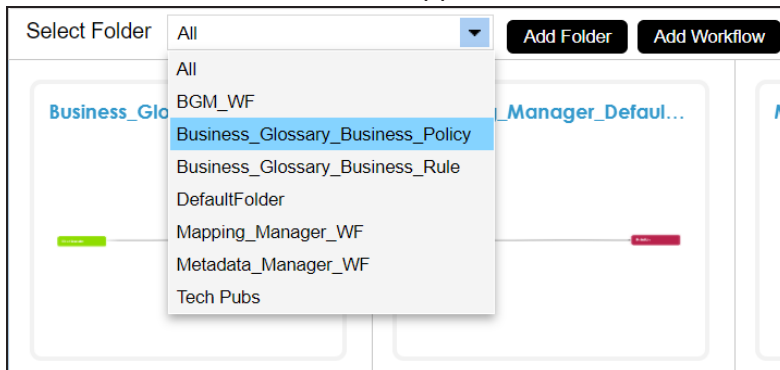
Before you assign workflows to business policies:

- 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

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

- 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

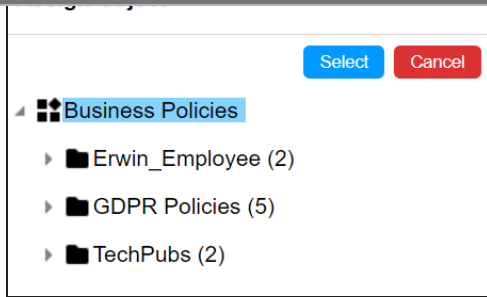
Send Email

☐

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

The Assign Object page appears.

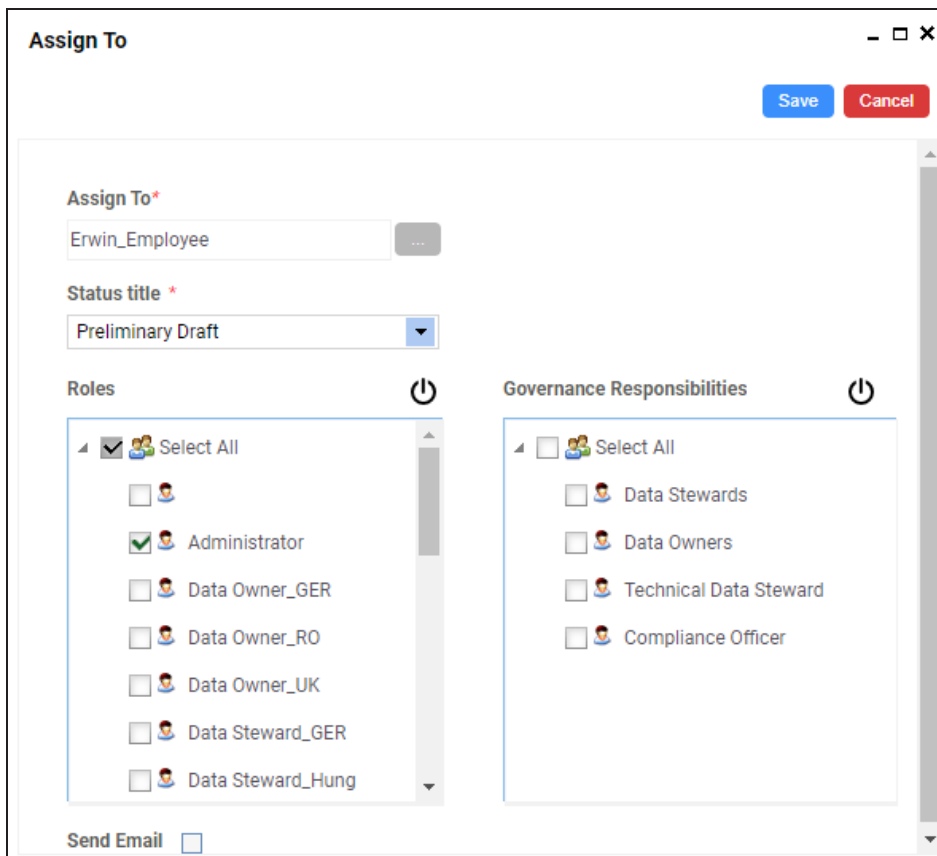
Assigning Workflows to Business Policies



A dialog box with a title bar. At the top right are two buttons: "Select" (blue) and "Cancel" (red). Below the buttons is a tree view under the heading "Business Policies". The tree contains three items: "Erwin_Employee (2)", "GDPR Policies (5)", and "TechPubs (2)".

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

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



The "Assign To" page is a form with a title bar containing "Assign To" and window controls. At the top right are "Save" (blue) and "Cancel" (red) buttons. The form contains the following fields and sections:

- Assign To***: A text input field containing "Erwin_Employee" and a dropdown arrow.
- Status title ***: A dropdown menu showing "Preliminary Draft".
- Roles**: A section with a power 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 icon. It contains a list of responsibilities with checkboxes:
 - ☐ Select All
 - ☐ Data Stewards
 - ☐ Data Owners
 - ☐ Technical Data Steward
 - ☐ Compliance Officer
- Send Email**: A checkbox at the bottom left.

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

istrator'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.

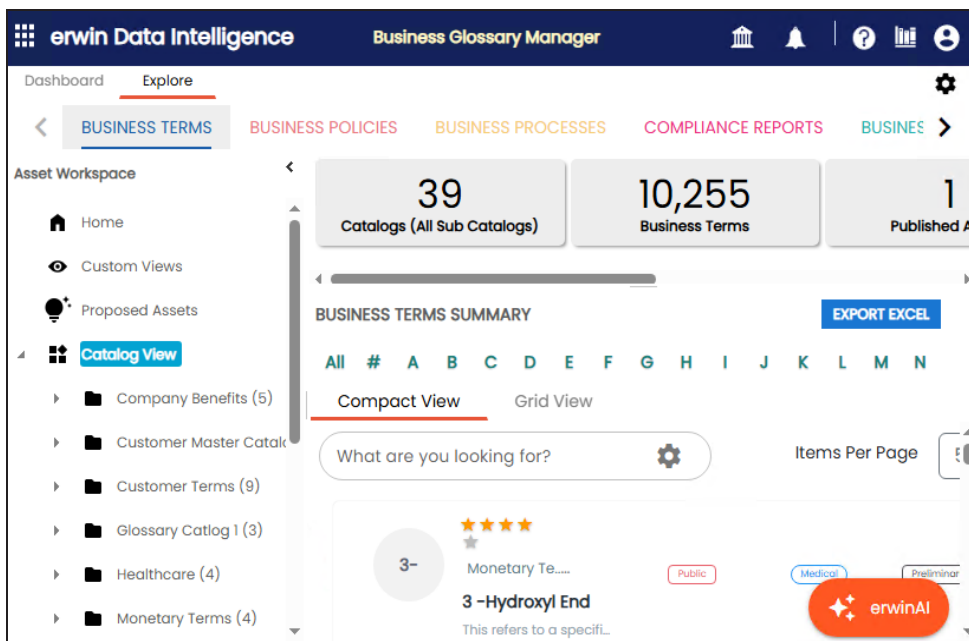
Once the workflow is assigned to the business policy, it can be executed via the Workflow Queue.

Executing workflows involves:

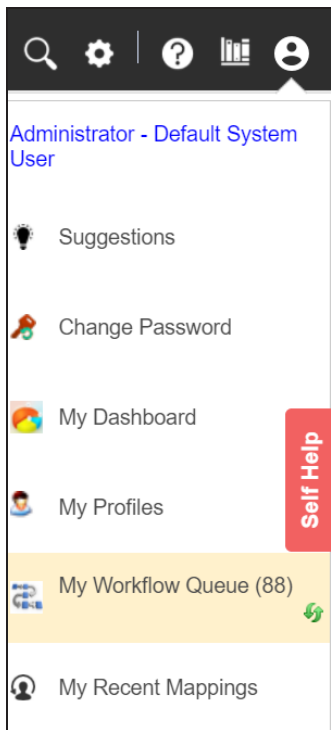
1. Receiving workflow queue notifications
2. Examining and moving the business policy to the next stage

To execute workflows for business policies, follow these steps:

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



The available options appear.



3. Click **My Workflow Queue**.

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

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

My Workflow Queue						
Object Path :		Object Name :	performance review policies	Status Title :	Object Description :	
Bulk Update :		Workflow :	Select	Assigned Object :	Status Title :	Trigger On :
#	Object Path	Object Type	Object Name	Object Description	Status Title	Co
1	Erwin_Employee	Business Policy	Performance Review Policies		Draft	Obj

The <Business_Policy> page appears.

Performance Review Policies

Erwin_Employee

View Business Policy Additional Information Associations Rich Media Library Collaboration Center Workflow Log History

Policy Details

Business Policy
Performance Review Policies

Workflow Status Preliminary Draft

Governance Responsibilities
No Assignments Found

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

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

Workflow Status Preliminary Draft

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

SAVE & SEND

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.

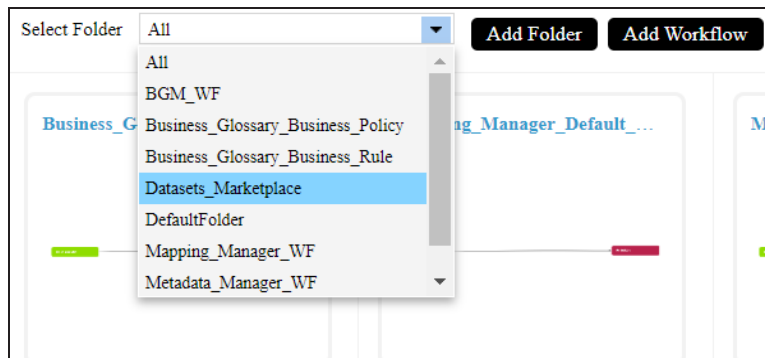
Before you assign workflows to datasets:

- 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.

Assign Workflow (Draft One Primer → Dataset)						
						New Assignment Close
#	Name	Created By	Created Date	Modified By	Modified Date	Options
1	Config Datasets	Administrator	10-05-2023 11:26:18			  
2	Market State Data	Administrator	10-05-2023 11:26:34			  

Assigning Workflows to Datasets

The Assign To page appears.

The 'Assign To' dialog box is shown with a title bar containing standard window controls. At the top right are 'Save' and 'Cancel' buttons. Below the title bar, there is an 'Assign To' field with a dropdown arrow and a 'Status title' field with a dropdown arrow. The 'Status title' is currently set to 'Draft'. Below these fields are two columns of roles and responsibilities. The 'Roles' column has a 'Select All' button and a list of roles: Administrator, Data Owner_GER, Data Owner_RO, Data Owner_UK, Data Steward_GER, and Data Steward_Hung. The 'Governance Responsibilities' column has a 'Select All' button and a list of responsibilities: 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 with a title bar containing standard window controls. At the top right are 'Select' and 'Cancel' buttons. Below the title bar, there is a tree view of datasets. The tree view has a root node 'Datasets' with a folder icon. Under 'Datasets' are several sub-nodes: 'Config Datasets (5)', 'Dataset Control (7)', 'Enterprise Datasets (7)', 'Datasets Import (2)', 'Market State Data (2)', and 'Prime Info (1)'. The 'Dataset Control (7)' node is highlighted with a blue background.

Assigning Workflows to Datasets

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

The screenshot shows a window titled "Assign To" with a "Save" button and a "Cancel" button in the top right corner. The "Assign To" field is filled with "Dataset Control". The "Status title" dropdown is set to "Draft". Below these fields are two lists: "Roles" and "Governance Responsibilities". The "Roles" list includes "Select All", "Administrator", "Data Owner_GER", "Data Owner_RO", "Data Owner_UK", "Data Steward_GER", and "Data Steward_Hung". The "Governance Responsibilities" list includes "Select All", "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.

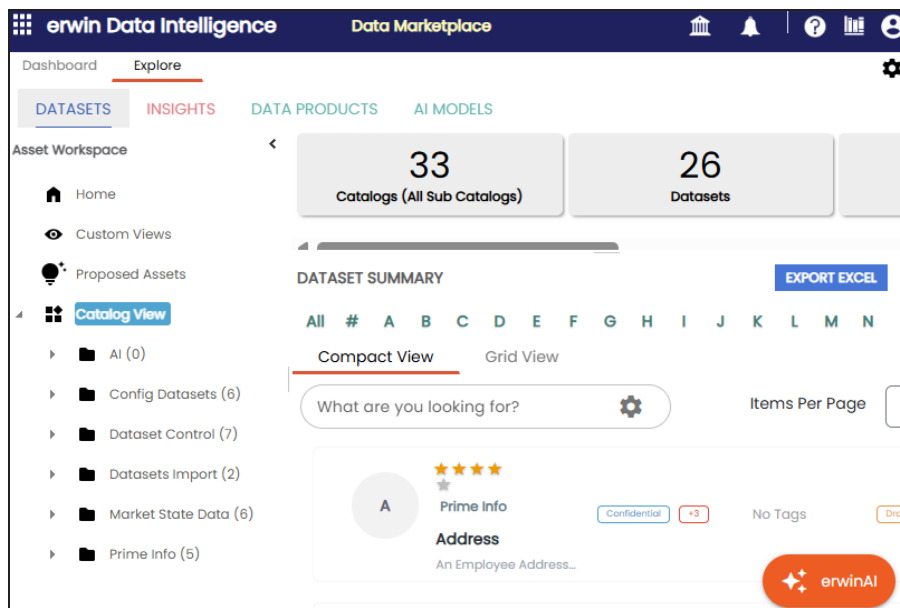
Executing workflows involves:

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

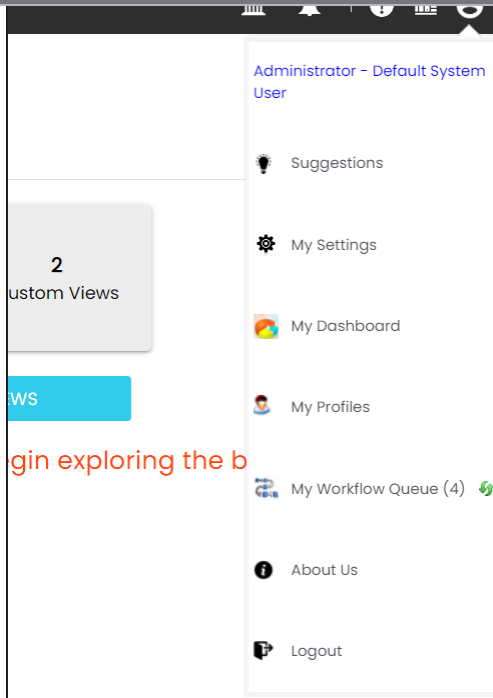
To execute workflows for the datasets, follow these steps:

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

The following page appears.



2. Click .



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 .

The dataset summary page appears.

Tele Info Records
Market State Data

Data Value Score
NONE

Workflow Status
Draft

Rating
★★★★★

Rich Media Library
0

Asset Information

Definition
Information related to electromagnetic conduction between devices in a workplace section.

Description
Information related to electromagnetic conduction between devices in a workplace section.

Related Assets (Associations)

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

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

Update Workflow

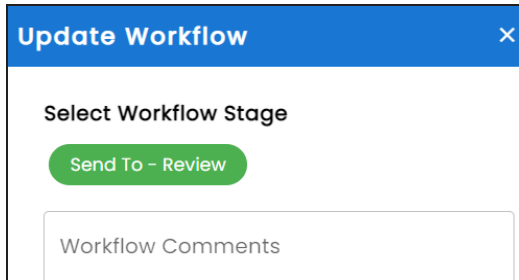
Select Workflow Stage

Send To - Review

Workflow Comments

SAVE & SEND

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.