

erwin Data Intelligence Suite

Workflow Management Guide

Release v10.0

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 erwin Inc. at any time. This Documentation is proprietary information of erwin Inc. and may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of erwin Inc.

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 erwin Inc. 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 erwin Inc. that all copies and partial copies of the Documentation have been returned to erwin Inc. or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, ERWIN 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 ERWIN 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 ERWIN 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 erwin Inc.

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 © 2020 erwin Inc. 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 Suite \(DI Suite\)](#), and includes the following:

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

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

Provide Feedback

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

erwin Data Modeler News and Events

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

Contents

Legal Notices	2
Contents	5
Managing Workflows	7
Using Workflow Manager	7
Adding Folders	8
Adding Workflows to Folders	9
Editing Folders	11
Editing Workflows	13
Deleting Folders	16
Deleting Workflows	18
Configuring Generic Workflows	20
Managing Mapping Manager Workflows	28
Assigning Workflows to Projects	28
Executing Workflows	34
Managing Metadata Manager Workflows	37
Assigning Workflows to Environments in Metadata Manager	38
Executing Workflows for Environments	42
Assigning Workflows to Tables	45
Executing Workflows for Tables	50
Assigning Workflows to the Columns	53
Executing Workflows for Columns	57
Managing Business Glossary Manager Workflows	61

Assigning Workflows to Business Terms	62
Executing Workflows for Business Terms	66
Assigning Workflows to Business Rules	70
Executing Workflows for Business Rules	74
Assigning Workflows to Business Policies	77
Executing Workflows for Business Policies	80

Managing Workflows

This section walks you through workflow management in Business Glossary Manager, Metadata Manager, and Mapping Manager.

Workflows are managed via Workflow Manager. It involves creating custom workflows and monitoring their execution.

Using Workflow Manager

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



UI Section	Icon	Function
Top Pane	Select Folder <input type="text" value="All"/>	Use this feature to select a folder to display the workflows in it.
	Add Folder	Use this option to create a folder.
	Switch To Detailed View/Switch To Tile View	Use this option to toggle between the detailed view and tile view.

UI Section	Icon	Function
	Add Workflow	Use this option to add a workflow to a folder.
Bottom Pane		Use this pane to configure, assign, edit, delete or view the workflows.

Using Workflow Manager involves:

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

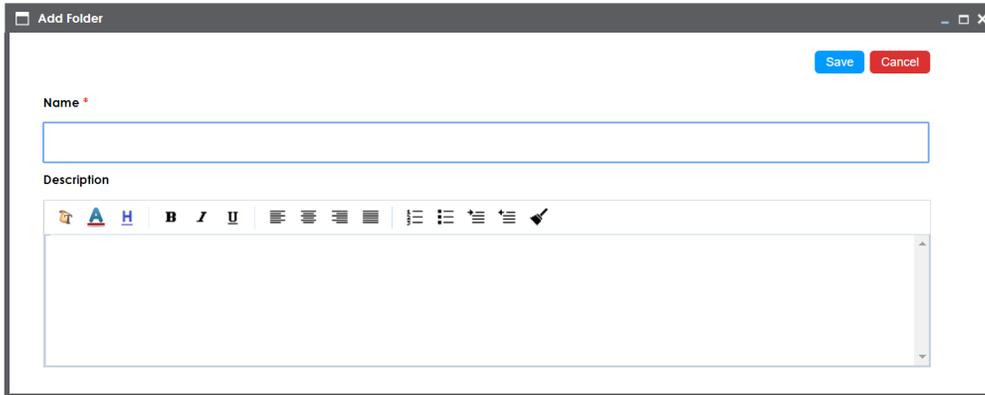
Adding Folders

The workflows are categorized under folders. The application has a default folder with few default workflows.

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 **Name** and **Description**.

For example:

- Name - Mapping_Manager_WF
- Description - This folder contains Mapping Manager workflows.

4. Click **Save**.

The new folder is created.

Once a folder is created, you can [add workflows](#) to it.

Adding Workflows to Folders

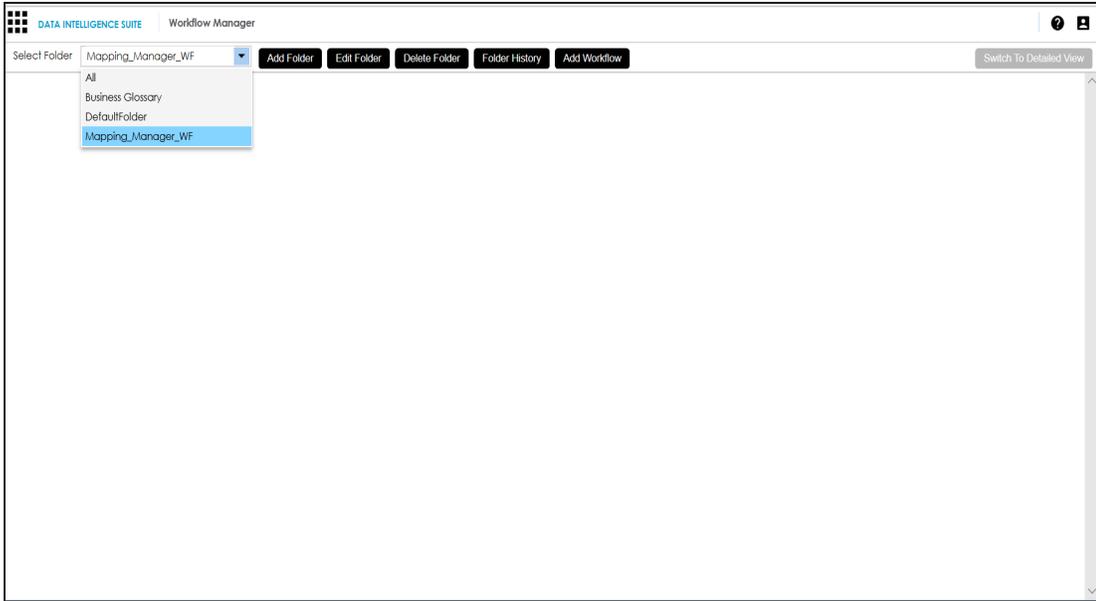
You can add workflows to a folder created by you.

The workflow can be for any of the following modules:

- Business Glossary Manager
- Metadata Manager
- Mapping Manager

To add workflows to the folder, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select a folder.



3. Click **Add Workflow**.

The following page appears.

The screenshot shows the 'Add Workflow' form. At the top right, there are 'Save' and 'Cancel' buttons. The form contains several fields: 'Folder *' (a dropdown menu with 'Mapping_Manager_WF' selected), 'Module *' (a dropdown menu with 'Select' selected), 'Object *' (a dropdown menu with 'Select' selected), 'Trigger Type *' (a dropdown menu with 'Select' selected), and 'Name *' (an empty text input field). Below these fields is a 'Description' section with a rich text editor toolbar (including icons for bold, italic, underline, link, unlink, list, and image) and a large empty text area for the description.

4. 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
Module Name	<p>Specifies the module of the workflow.</p> <p>For example, Mapping Manager.</p> <p>You can create workflow for three modules, Business Glossary Manager, Metadata Manager, and Mapping Manager. The module specified here allows you to assign the workflow to an object in that module only.</p>
Object	<p>Specifies the object for which the workflow is being created.</p> <p>For example, Mapping.</p> <p>The object list depends on the module selected.</p>
Trigger Type	<p>Specifies the trigger type for the workflow.</p> <p>For example, On Create.</p>
Name	<p>Specifies the name of the workflow.</p> <p>For example, Map_Wkflw.</p>
Description	<p>Specifies the description about the workflow.</p> <p>For example: The workflow module is Mapping Manager and it is for the mapping object.</p>

5. Click **Save**.

The workflow is added to the folder.

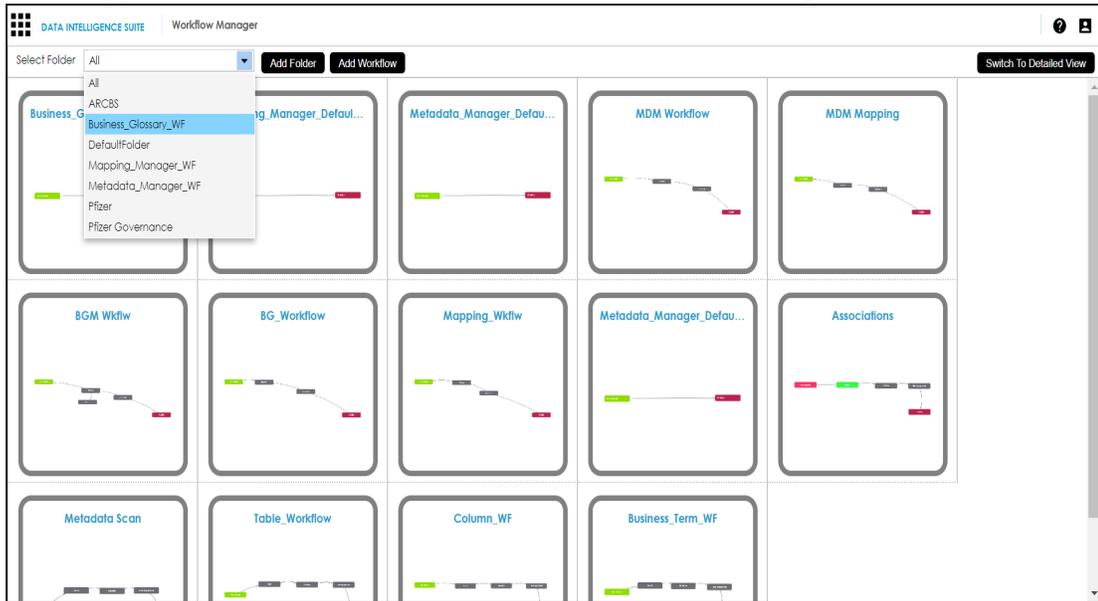
Once a workflow is added to a folder, you can [configure the workflow](#).

Editing Folders

You can update a folder's name and its description by editing it.

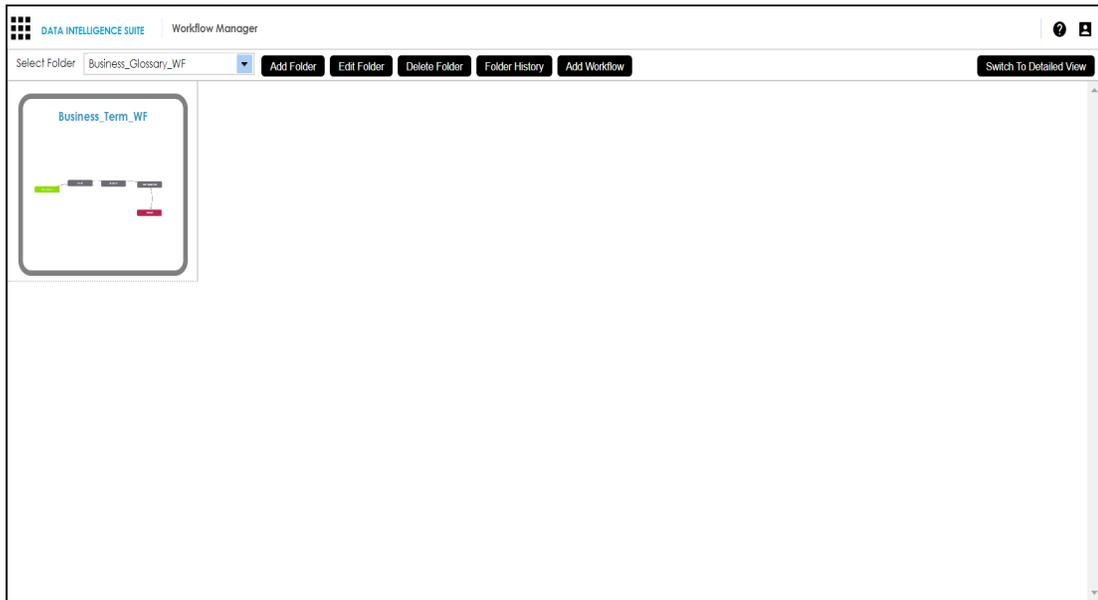
To edit folders, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.



2. Select the desired folder.

The following page appears.



3. Click **Edit Folder**.

The following page appears.

The screenshot shows a form for editing a workflow. At the top right, there are two buttons: 'Save' (blue) and 'Cancel' (red). The form contains the following fields:

- Name:** Business_Glossary_WF
- Description:** Managing workflows for business glossary manager. (This field includes a rich text editor toolbar with icons for bold, italic, underline, list, and link.)
- Created By:** Administrator
- Created Date:** 11/20/2019 11:58:25
- Last Modified By:** Administrator
- Last Modified Date:** 11/20/2019 11:58:25

4. Edit the required fields.
5. Click **Save**.

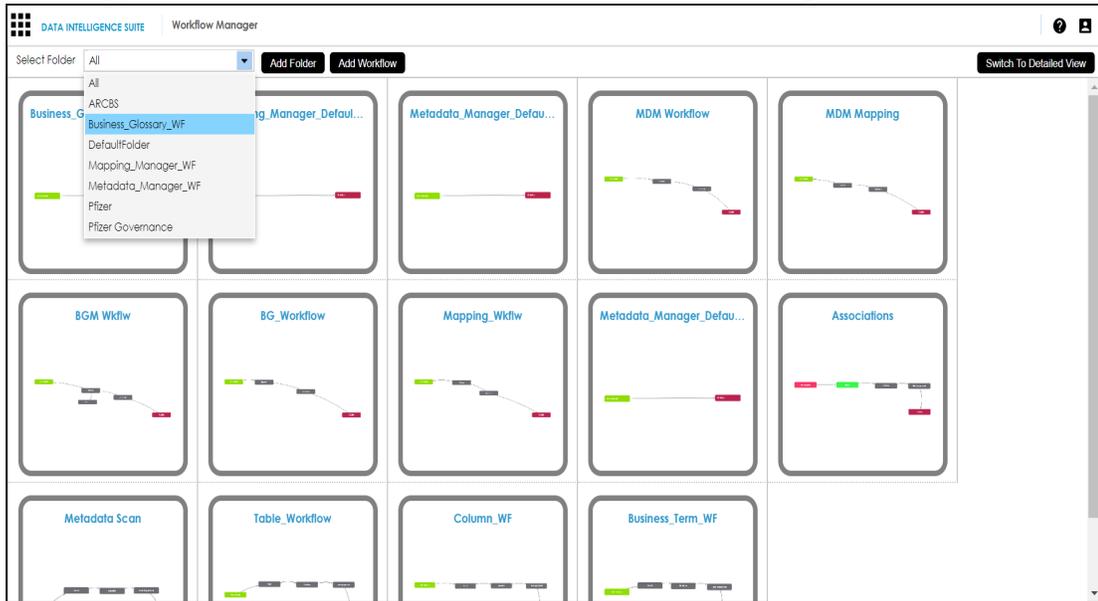
The Folder is updated.

Editing Workflows

After adding a workflow to a folder, you can move it to another folder and change its name. But you cannot edit its Module, Object and Trigger Type fields.

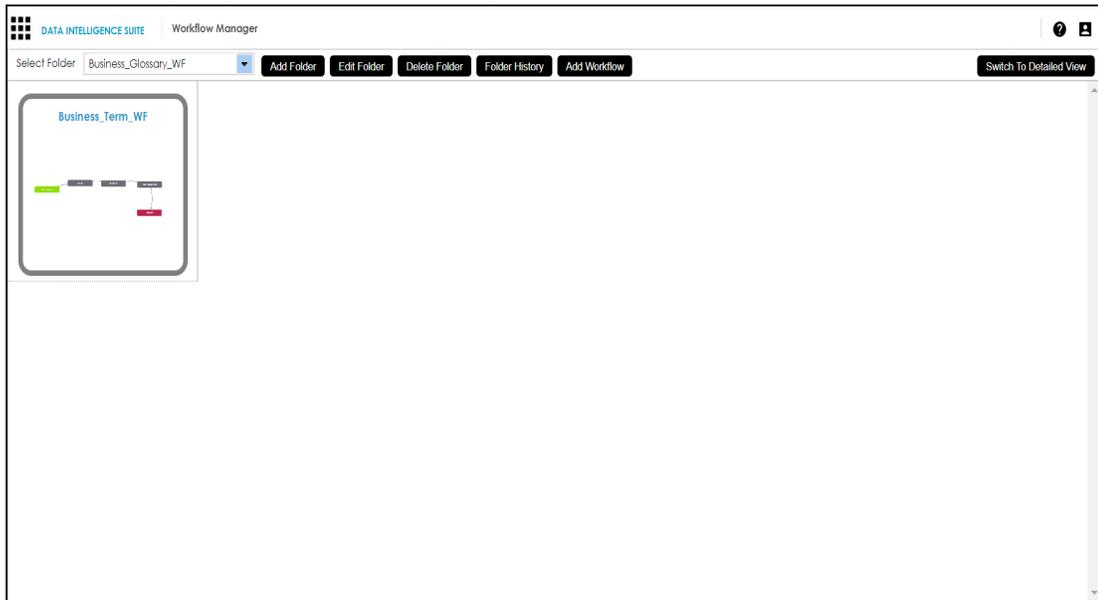
To update workflow's folder and its name, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.

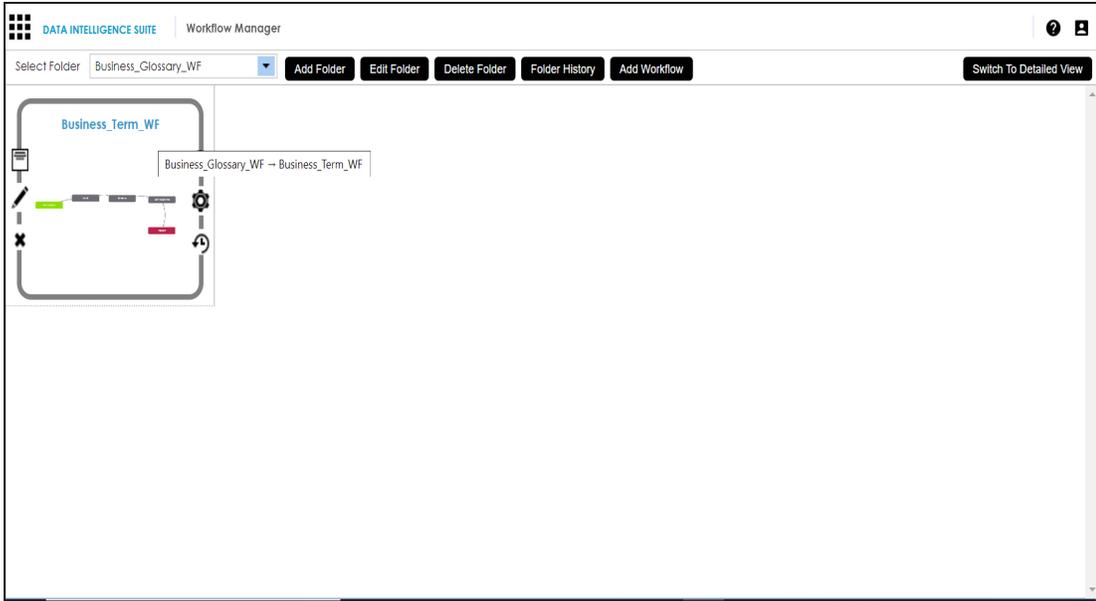


2. Select the folder containing the desired workflow.

The following page appears displaying the workflow.

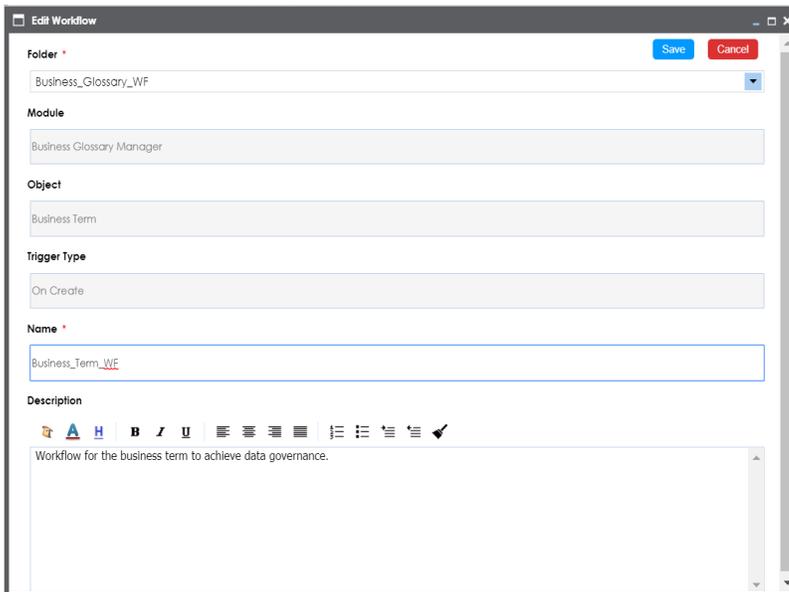


3. Hover over the workflow.



4. Click .

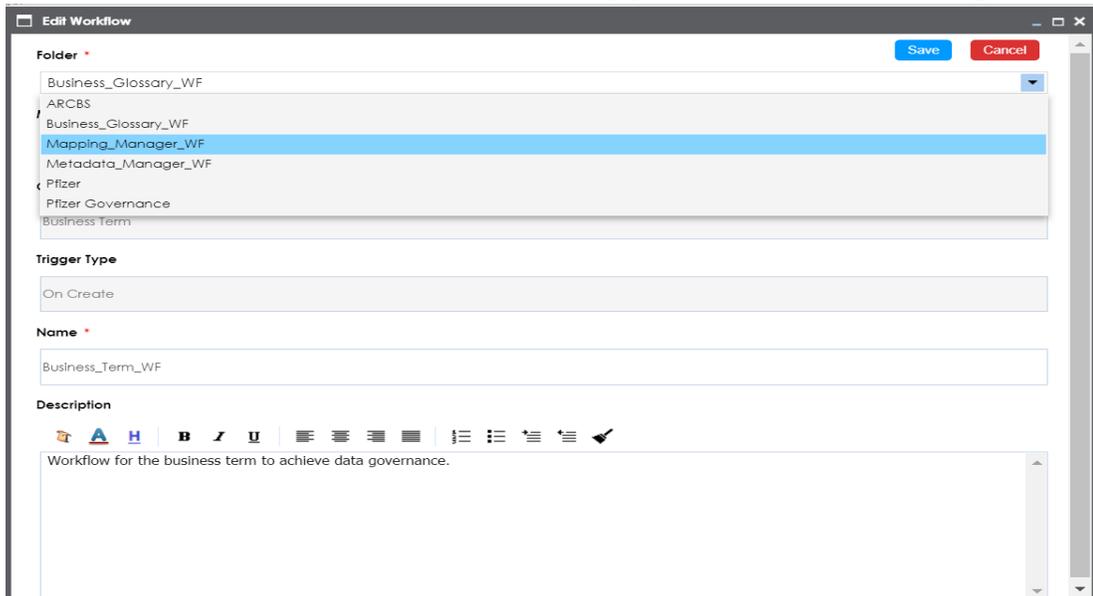
The Edit Workflow page appears.



5. Click the **Folder** field box.

The list of folders appears.

Note:The list includes all the folders created by you in the Workflow Manager.



6. Select the desired folder.
7. Edit the name of the workflow, if required.
8. Click **Save**.

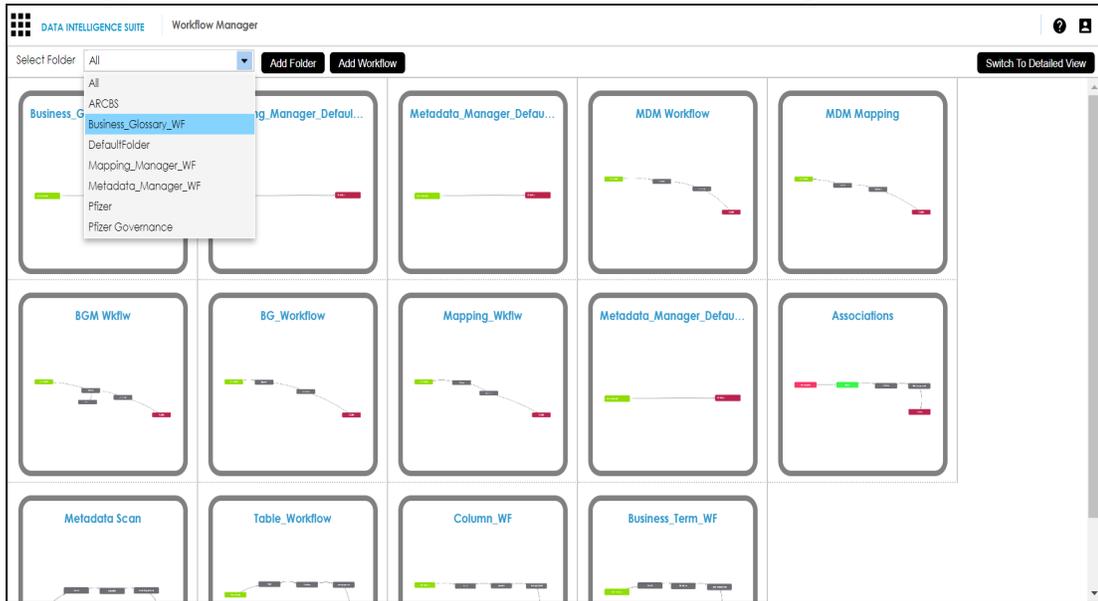
The workflow is updated.

Deleting Folders

You can delete a folder if it is not required.

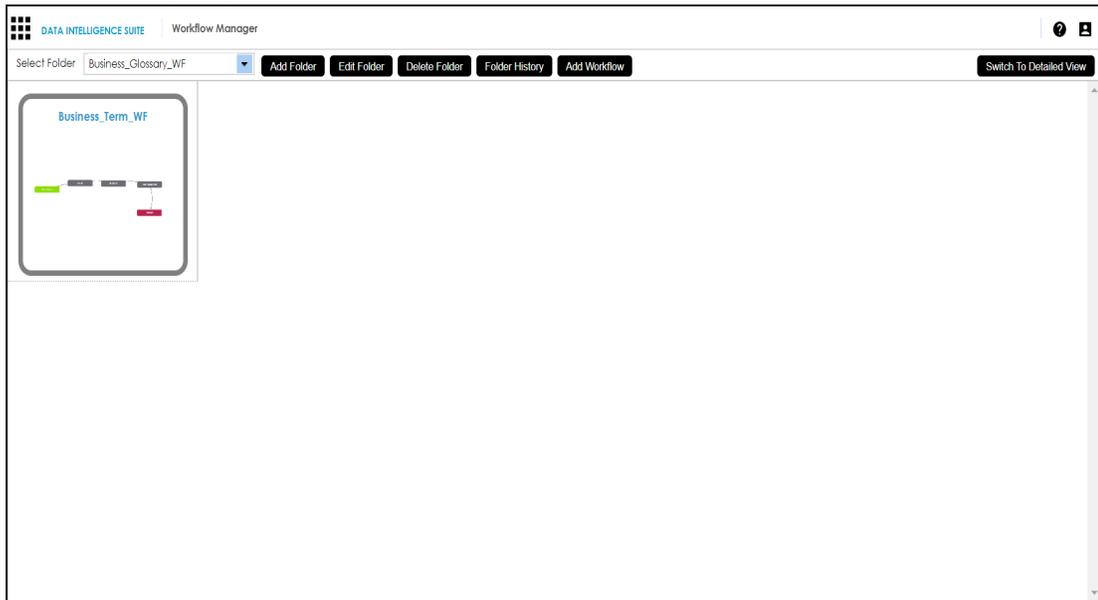
To delete folders, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.



2. Select the folder to be deleted.

The following page appears.



3. Click **Delete Folder**.

A warning message appears.

4. Click **Yes**.

The folder is deleted.

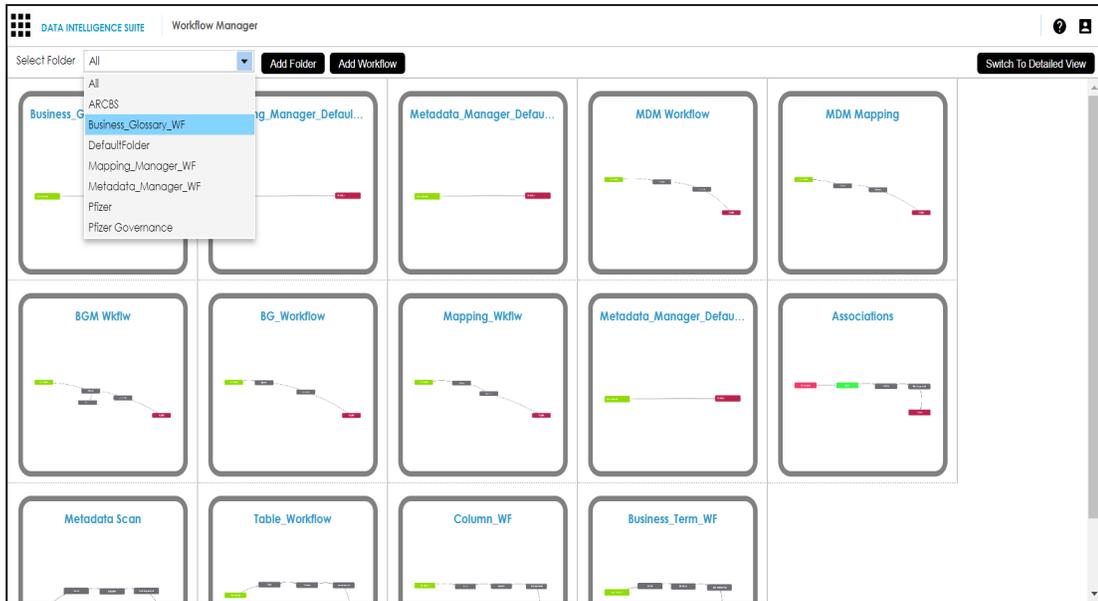
Note: If workflows in the folder are being used by objects, then the folder cannot be deleted.

Deleting Workflows

You can delete only those workflows which are not assigned to any object.

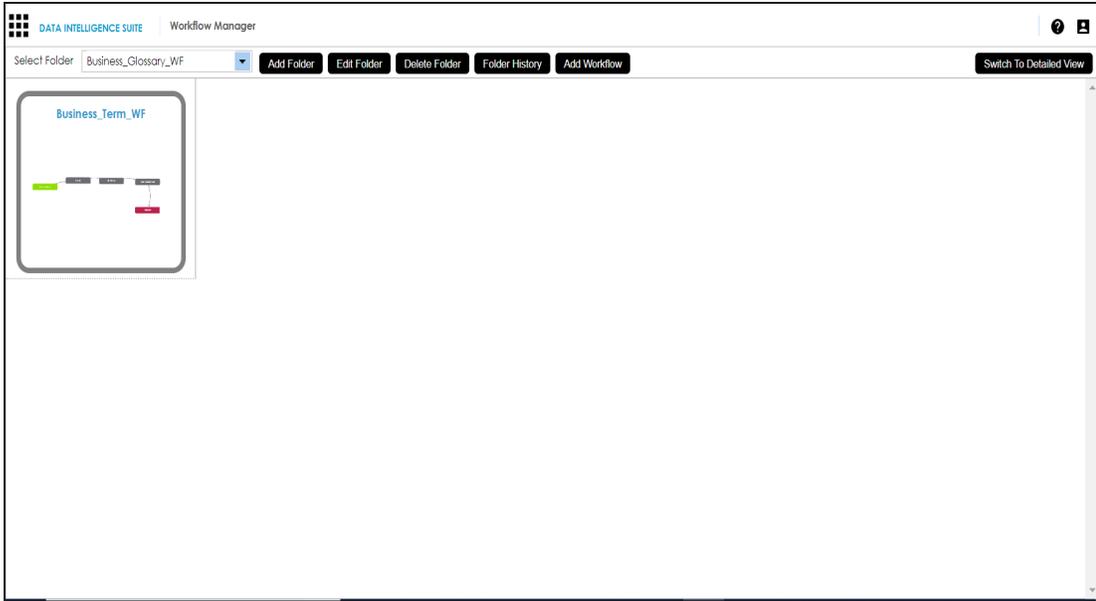
To delete workflows, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.

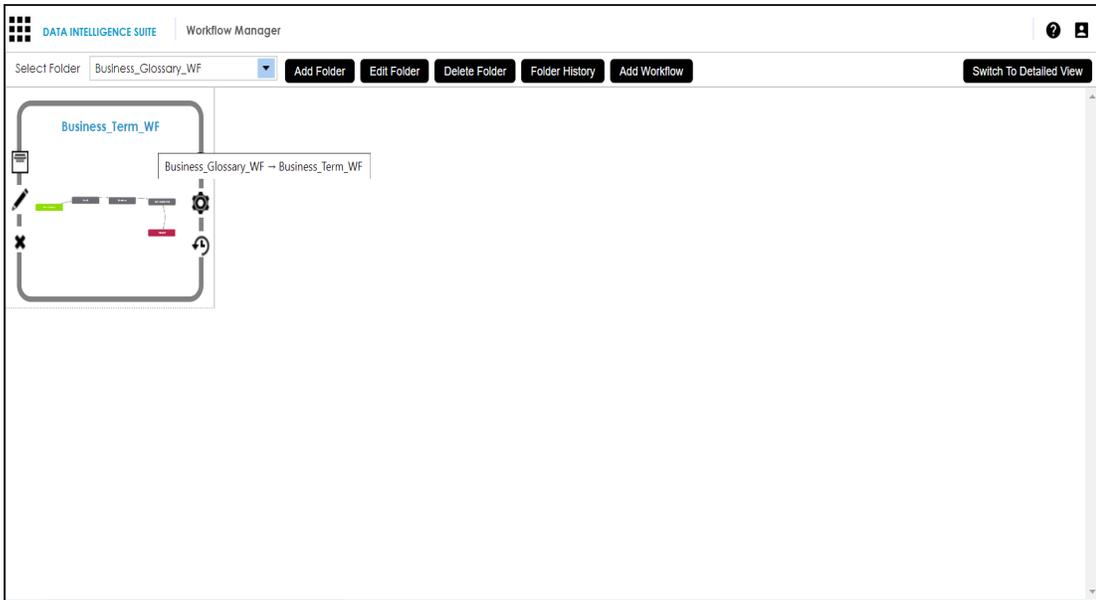


2. Select the folder containing the workflow to be deleted.

The following page appears displaying all the workflows in the selected folder.



3. Hover over the workflow.



4. Click **X**.

A warning message appears.

5. Click **Yes**.

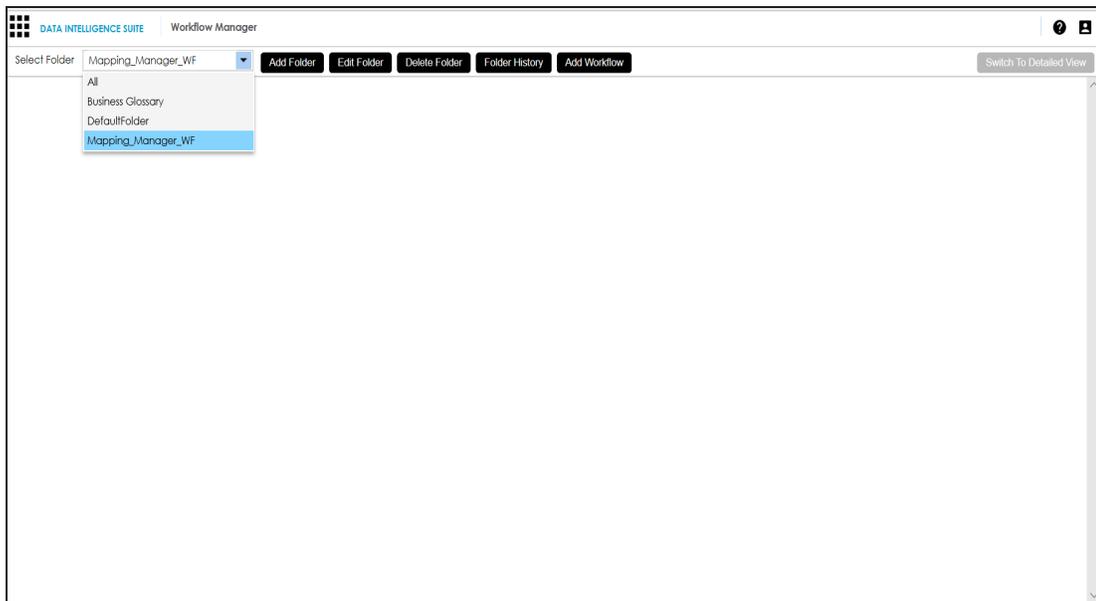
The workflow is deleted.

Configuring Generic Workflows

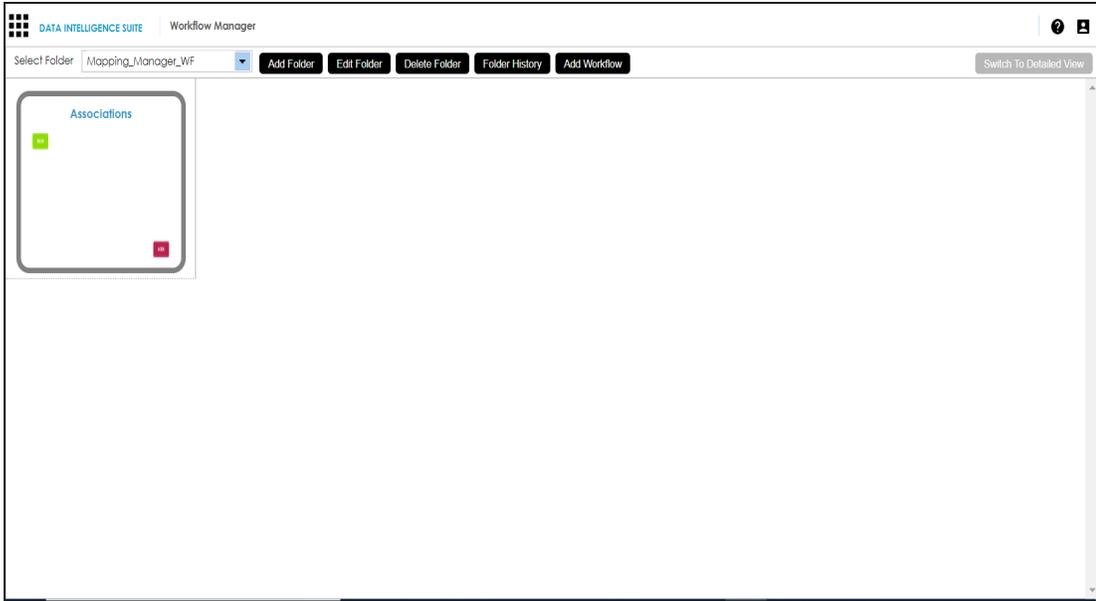
After creating a folder and adding a workflow to the folder, you can configure the workflow. You can configure a workflow by connecting different stages in a desired sequence. You can also create different stages and assign roles to these stages.

To create stages and assign roles to the stages, follow these steps:

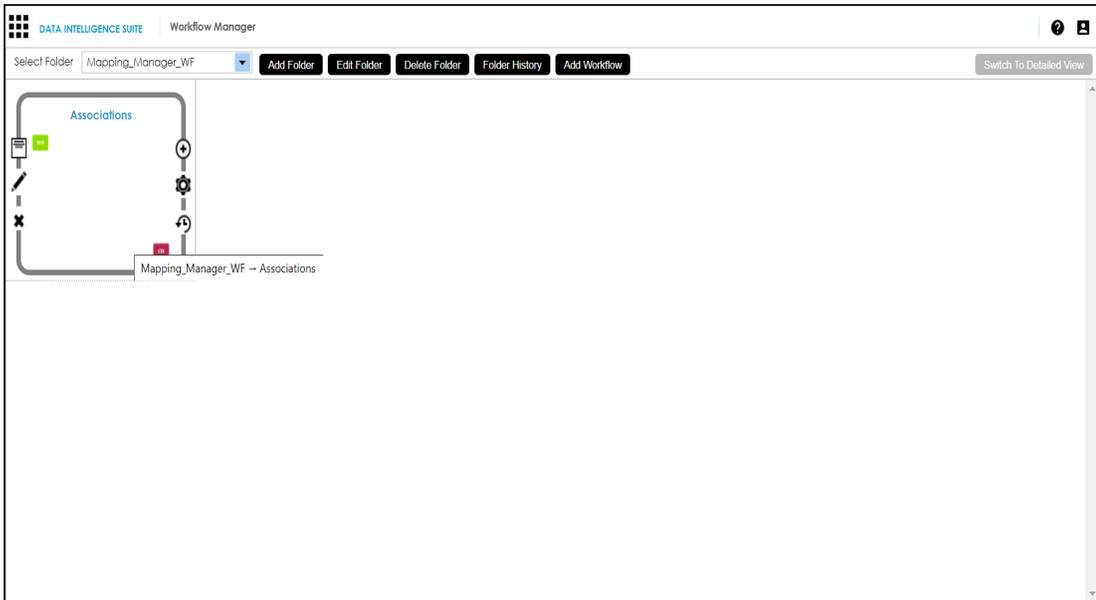
1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select the folder.



The workflow appears.

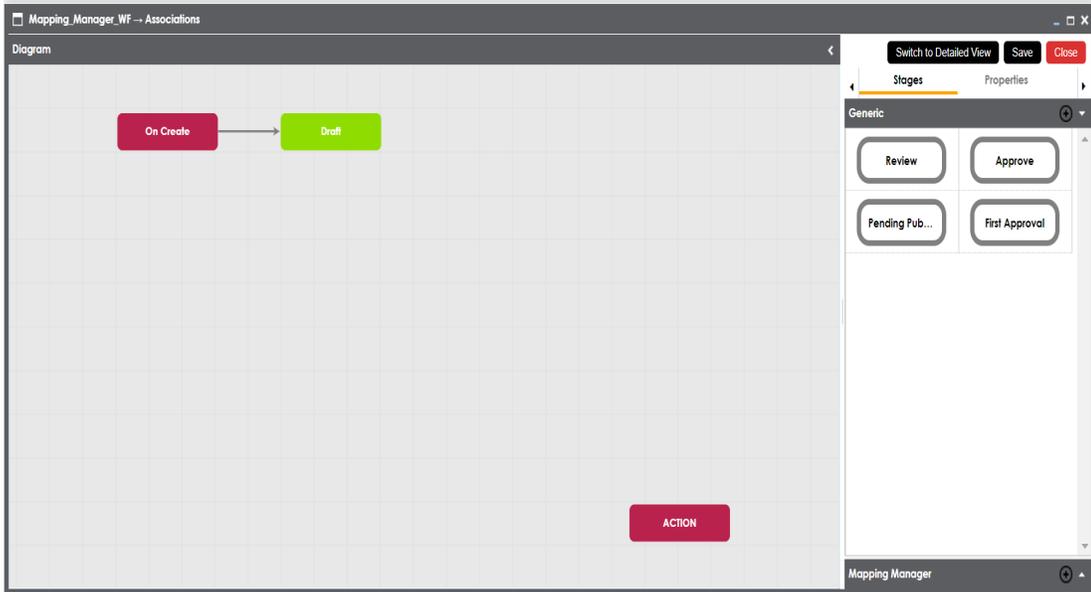


3. Hover over the workflow.



4. Click .

The following page appears.



5. Click the **Stages** tab and click  on the **Generic** tab.

The Add Stage page appears.

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

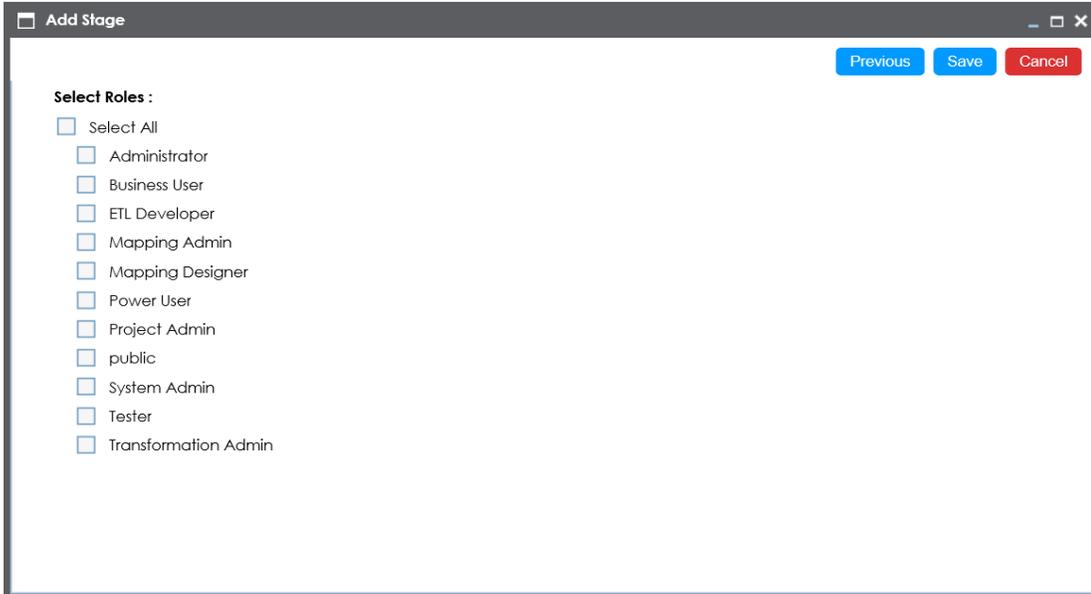
For example:

- Name - Review
- Status Title - Pending Review

- Description - The stage is part of Mapping_Manager_WF.

7. Click **Save**.

The following page appears.



8. Select the roles by selecting the appropriate check box.

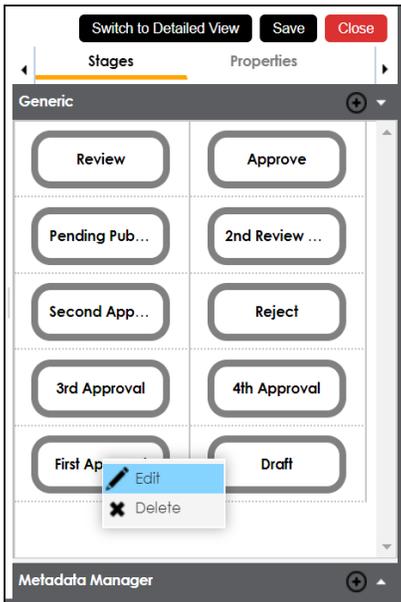
9. Click **Save**.

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

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

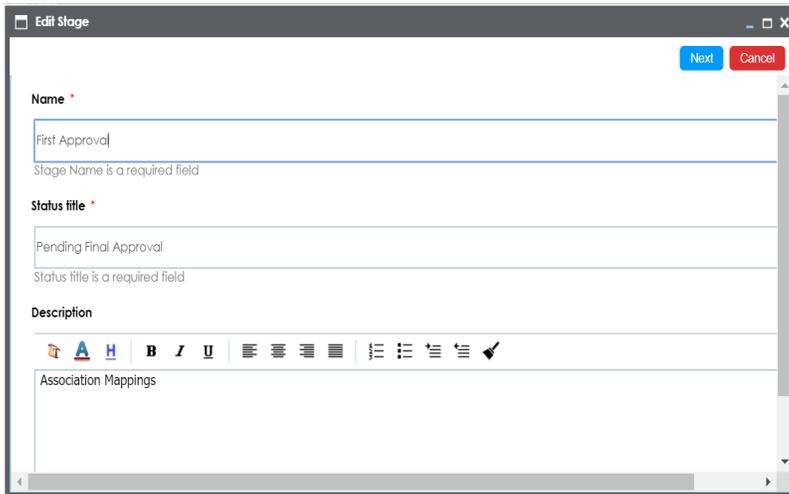
To update stages, follow these steps:

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



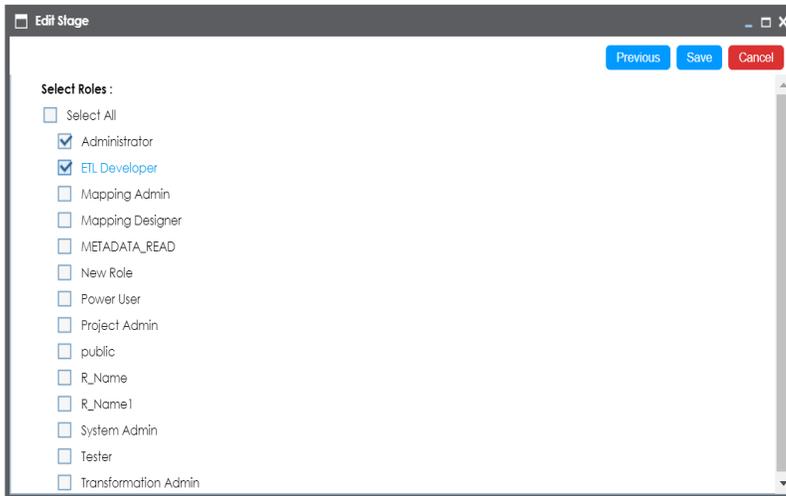
2. Click **Edit**.

You can update the stage name and its description.



3. Click **Next**.

You can update the roles assigned to the stage.

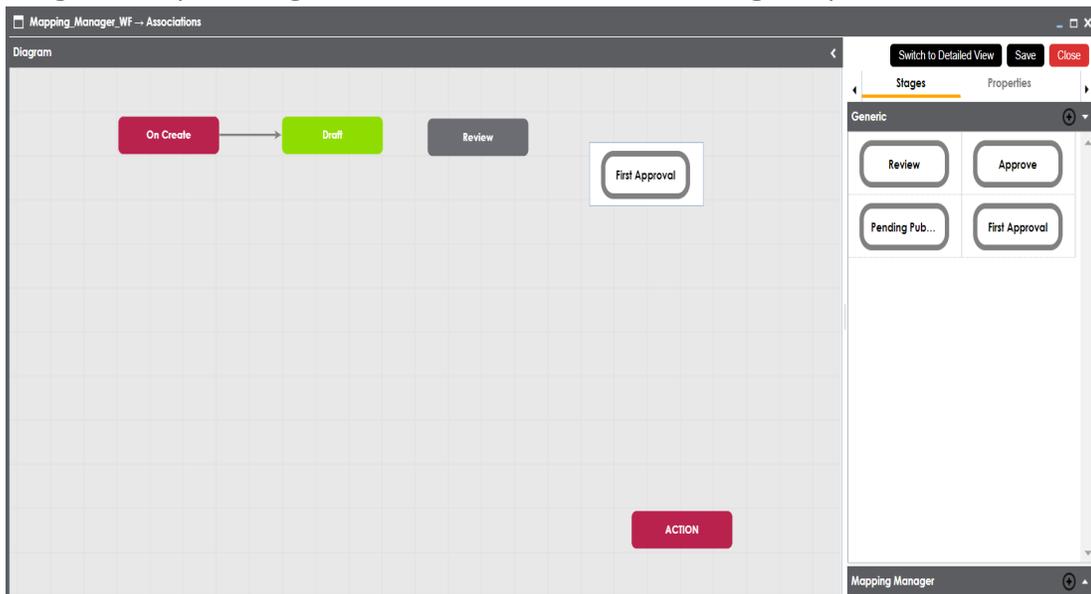


4. Click **Save**.

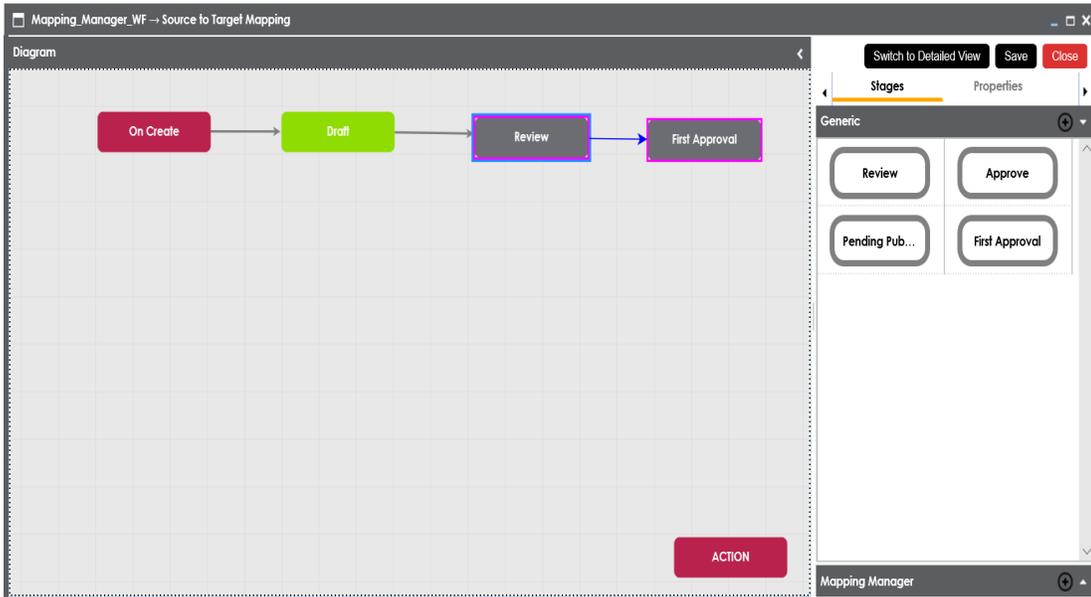
The stage is updated.

To add generic stages to workflows, follow these steps:

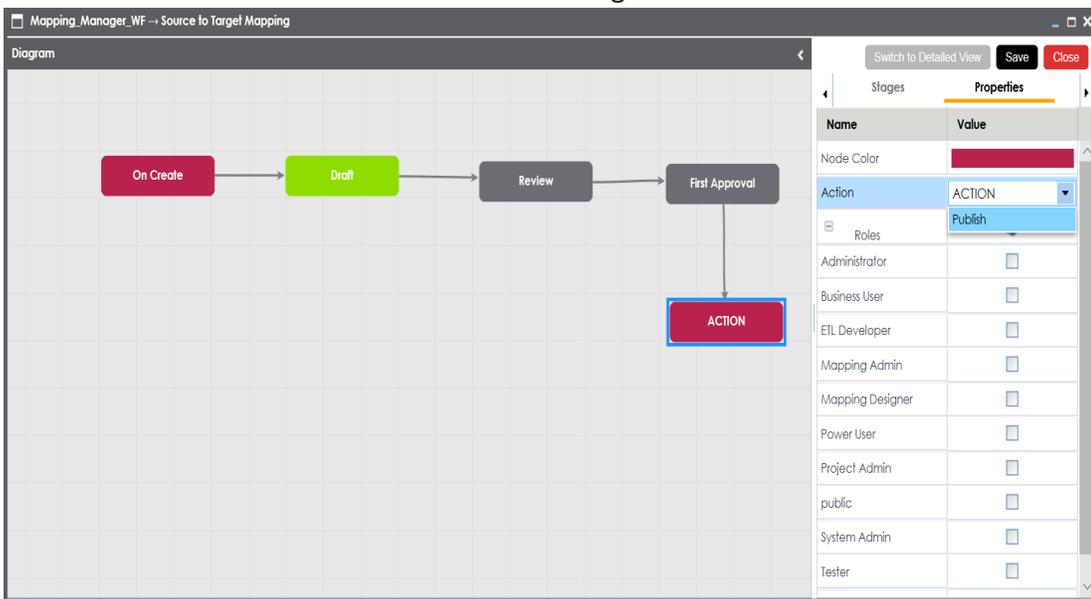
1. Drag and drop the stages from the **Generic** tab to the **Diagram** pane.



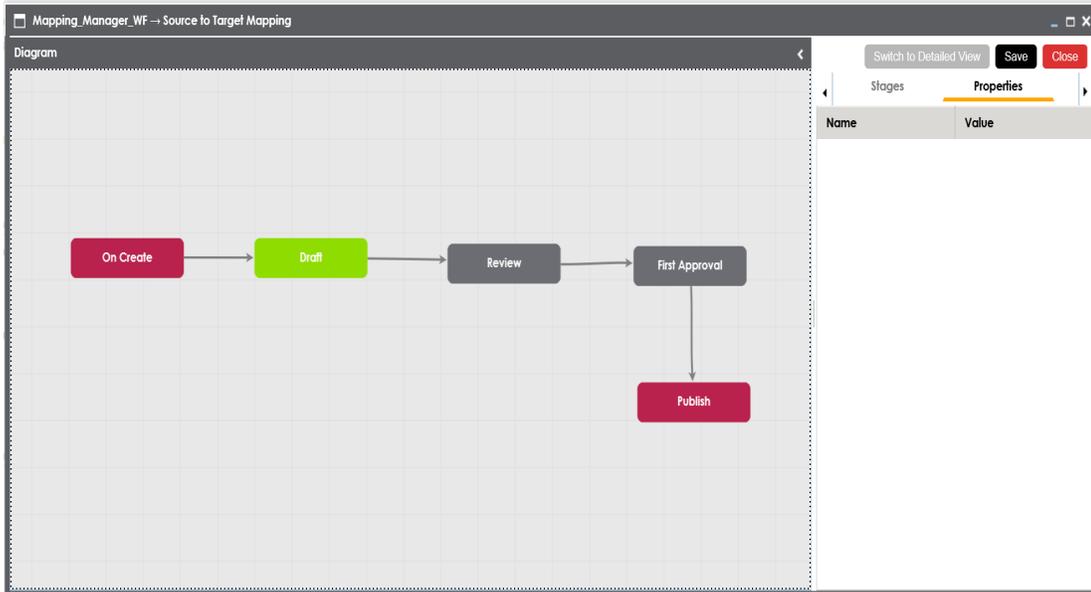
2. Drag the cursor from one stage to the next stage to connect the two stages.



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



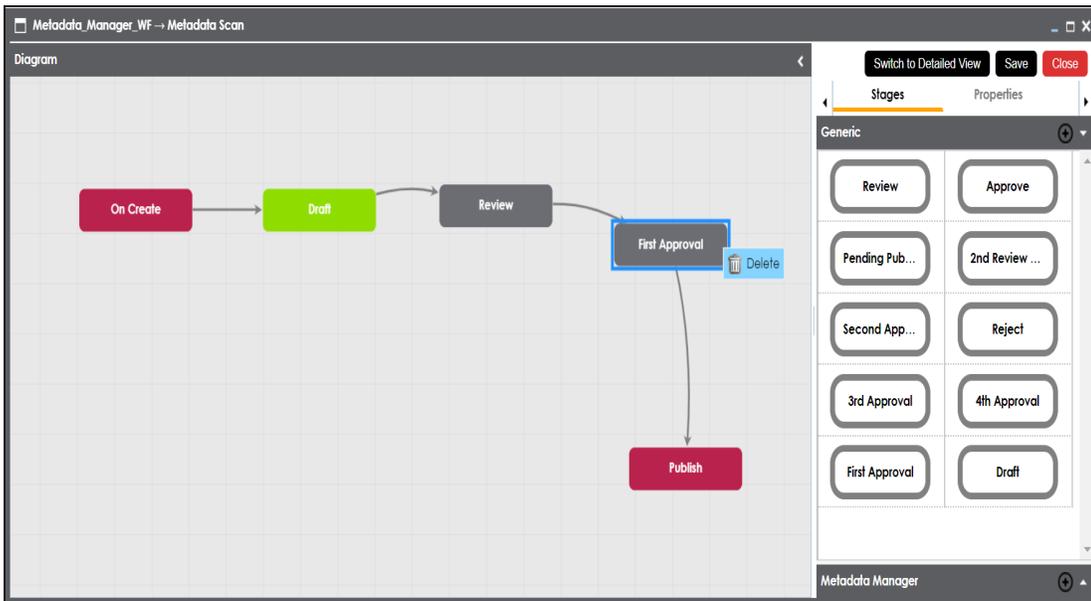
5. Select appropriate roles by selecting the appropriate check boxes.
6. Click **Save**.



The workflow is configured and saved.

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

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



2. Click **Delete**.

The stage is deleted from the workflow diagram.

Managing Mapping Manager Workflows

You can create a generic workflow and assign it to projects in the Mapping Manager.

Creating and configuring workflows involves:

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

Once a workflow is configured it can be [assigned to projects in the Mapping Manager](#).

A workflow assigned to a project is applicable 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 work flow queue](#) and the mapping object moves across the different stages of the workflow.

Assigning Workflows to Projects

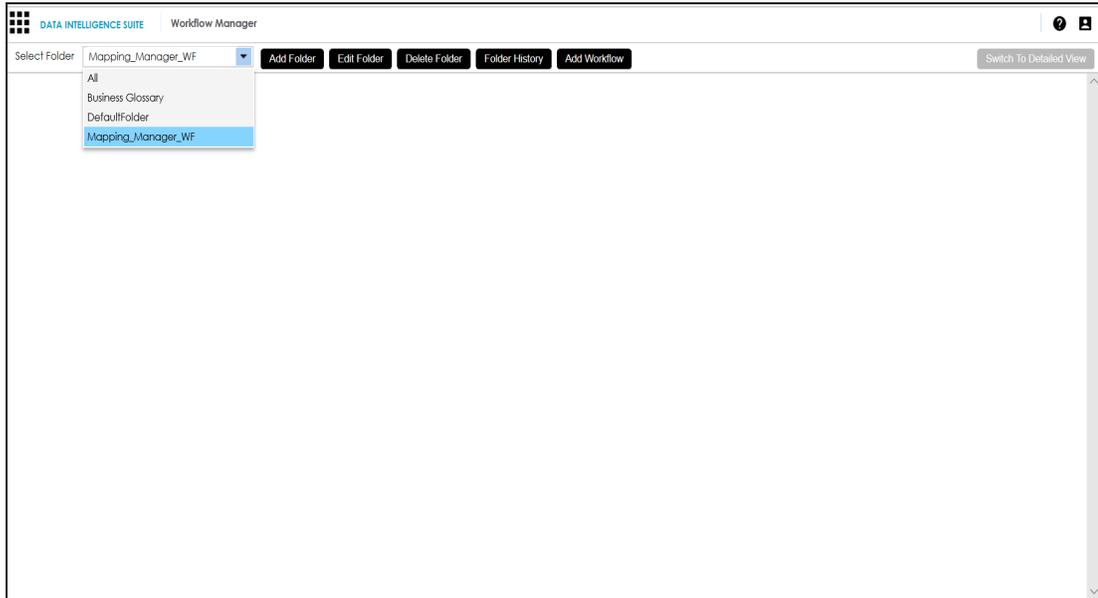
After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to projects in the Mapping Manager.

You should take a note of the following things:

- Ensure that you specified the module as **Mapping Manager** and the object as **Mapping** while adding the workflow to the folder.
- The default workflow (Mapping_Manager_Default_Workflow) is assigned to all the mappings in the Mapping Manager. You can re-assign your own workflow and override the default workflow.

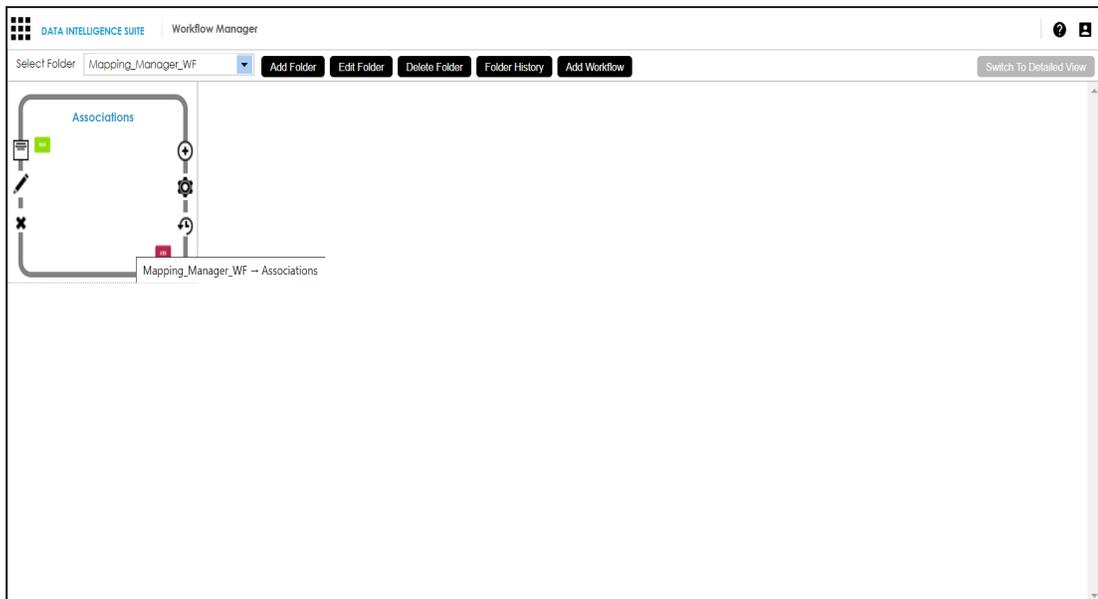
To re-assign workflows to the projects in the Mapping Manager, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select the folder where you added the workflow.



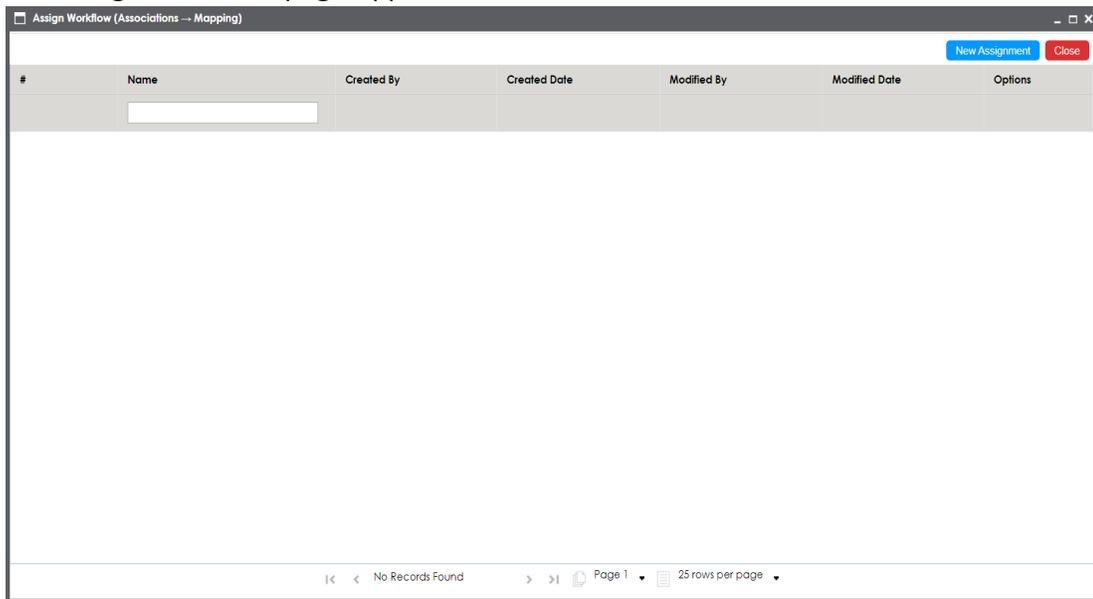
The workflows in the folder appear.

3. Hover over the desired workflow.



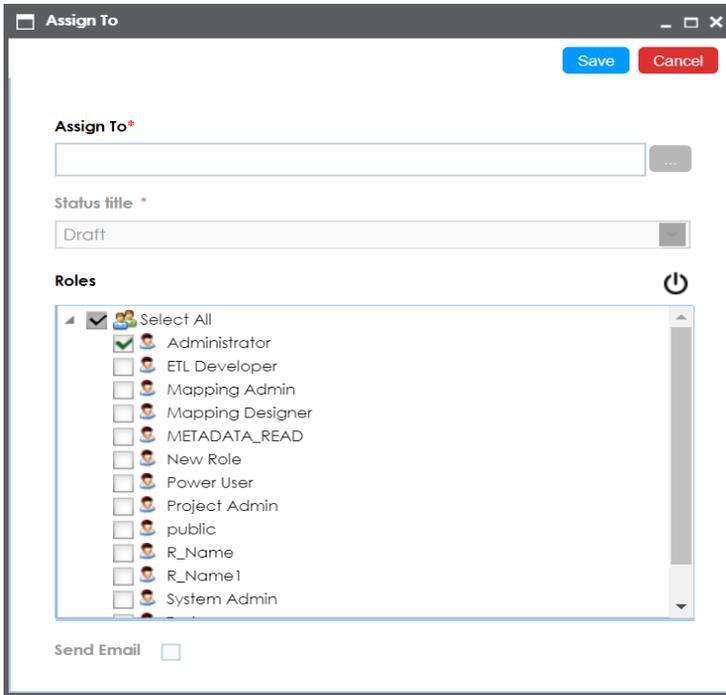
4. Click .

The Assign Workflow page appears.



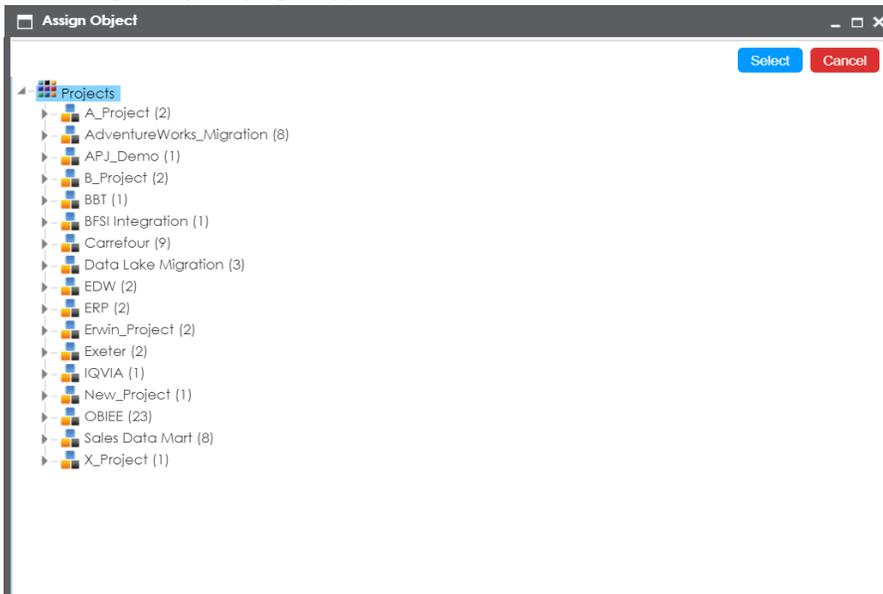
5. Click **New Assignment**.

The Assign To page appears.



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

The Assign Object page appears.



7. Select the desired project and click **Select**.

A warning page appears.

8. Click **Yes**.

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

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

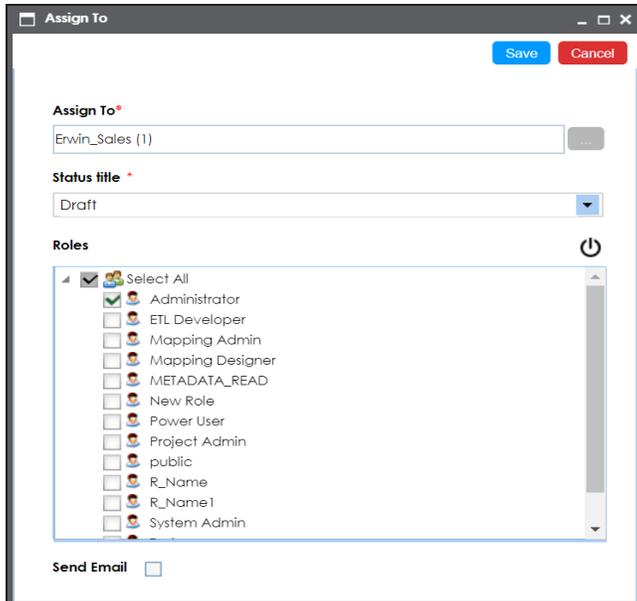
Current Object Status	Fallback/New Status
Draft	<input type="text" value="Draft"/>

9. Select the appropriate **Fallback/New Status**.

10. Click **Next**.

11. Enter relevant comments, and click .

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



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

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

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

Executing Workflows

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

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

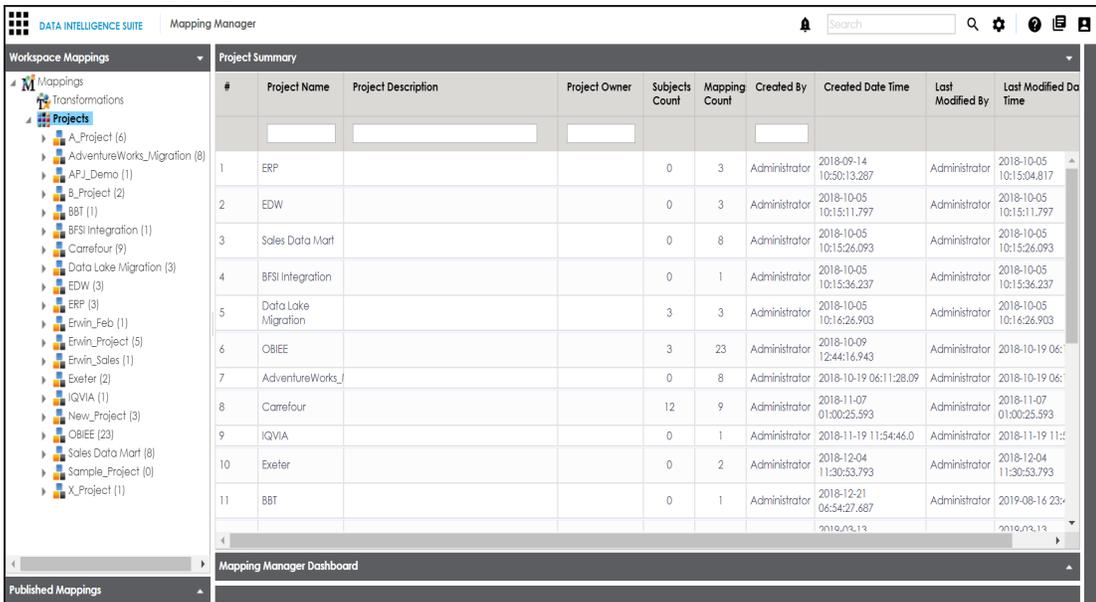
Executing workflows involves:

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

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

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

The following page appears.



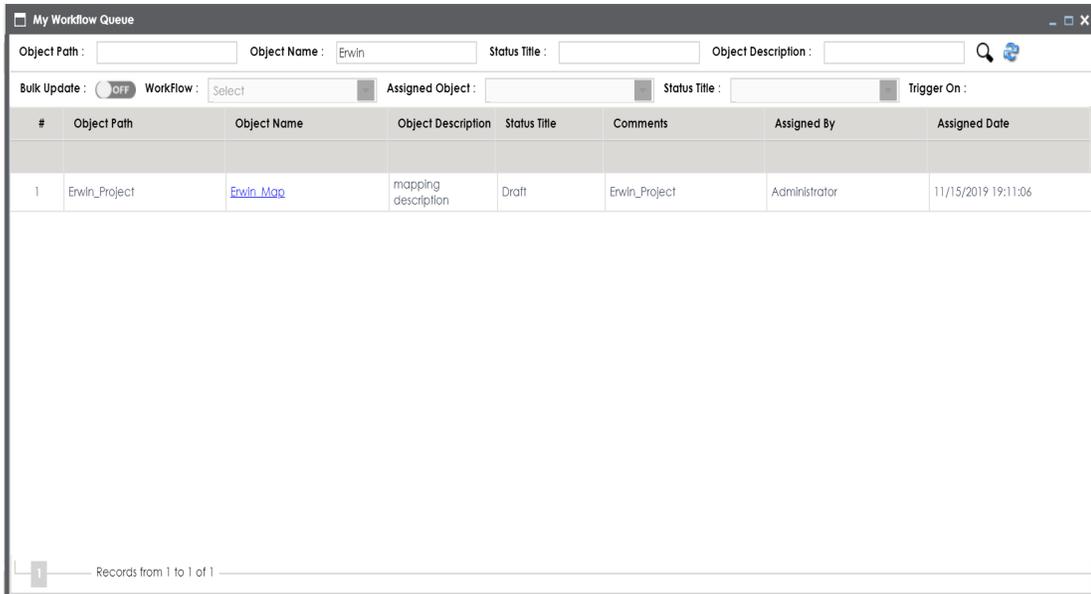
2. Click .
3. Click **My Workflow Queue**.

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

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

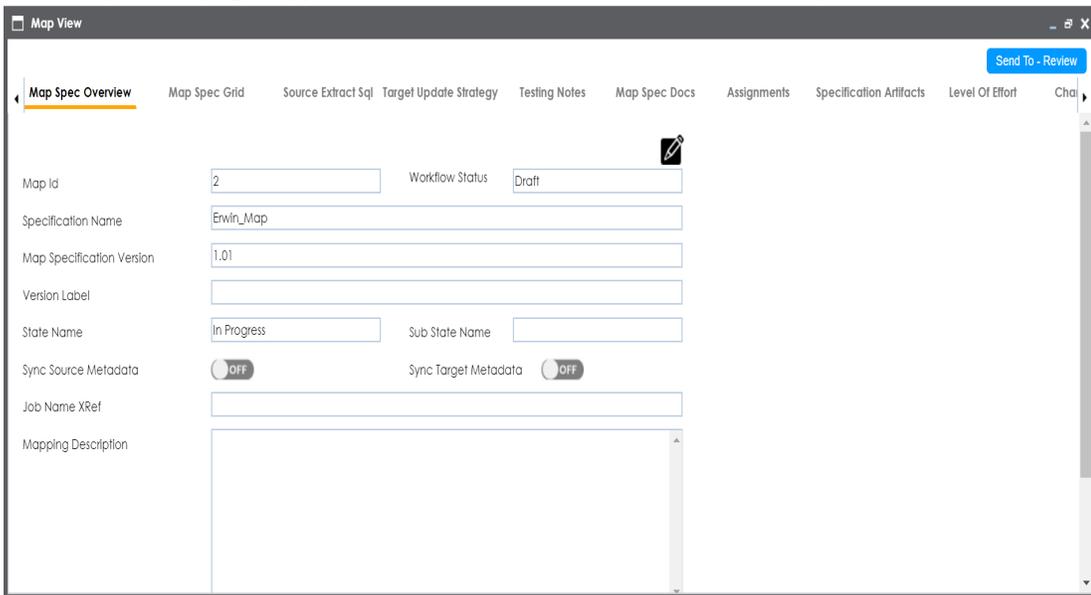
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

The search results appear.



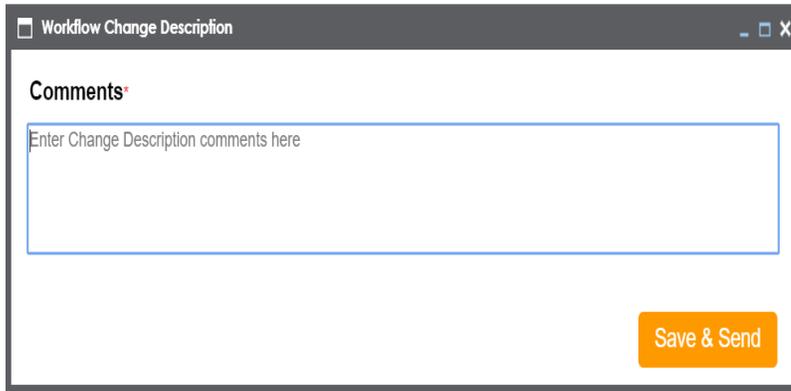
5. Click the <Object_Name> appearing as a hyperlink.

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



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 window titled "Workflow Change Description". Inside the window, there is a section labeled "Comments". Below this label is a large text input area with a blue border and the placeholder text "Enter Change Description comments here". In the bottom right corner of the window, there is an orange button with the text "Save & Send".

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

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

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

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 to the folders](#)
3. [Configuring generic 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 work flow 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 in Metadata Manager

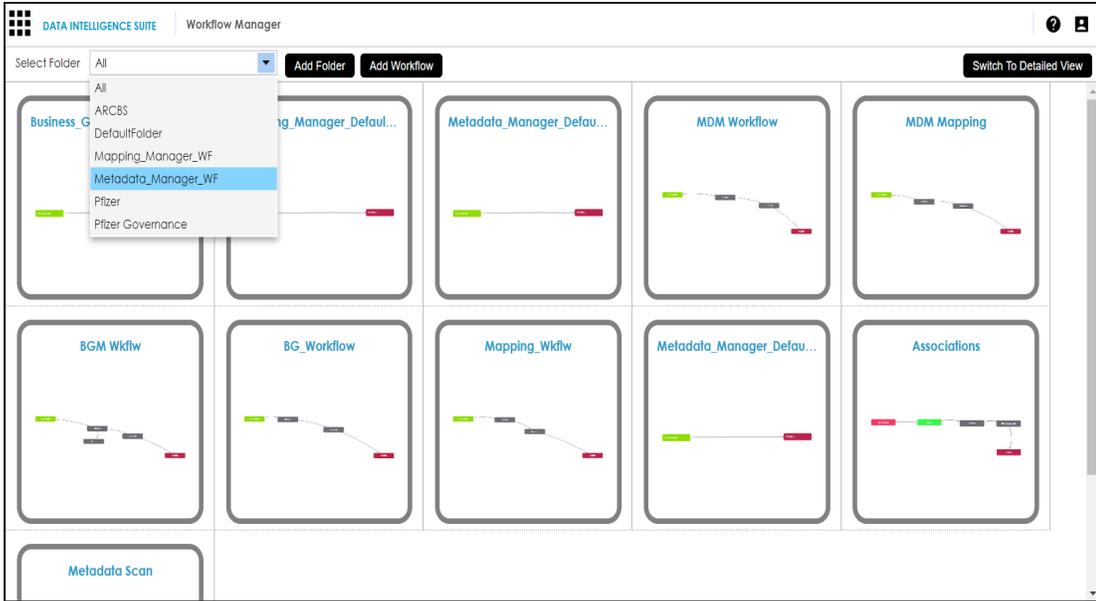
After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to environments in the Metadata Manager.

You should take a note of the following things:

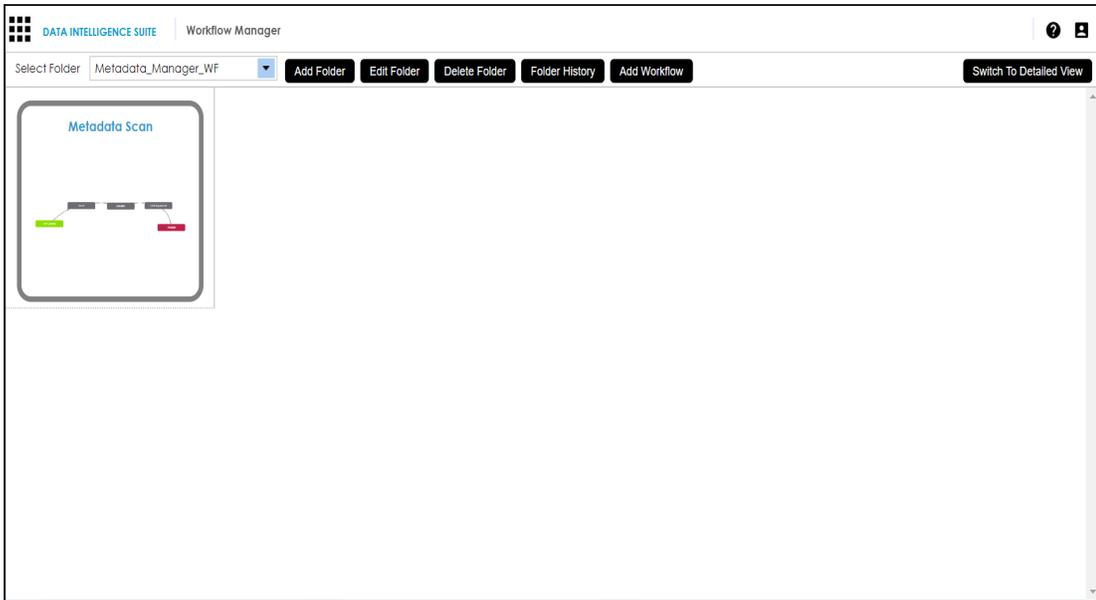
- Ensure that you specified the module as **Metadata Manager** and the object as **Environment** while adding the workflow to the folder.
- You should assign the workflow to the system before creating the environment.
- The workflow assigned to a system applies to all the environments under the system.

To assign workflows to environments in the Metadata Manager, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select the desired folder.



All the workflows in the folder appear.



3. Hover over the desired workflow.

4. Click .

The following page appears.

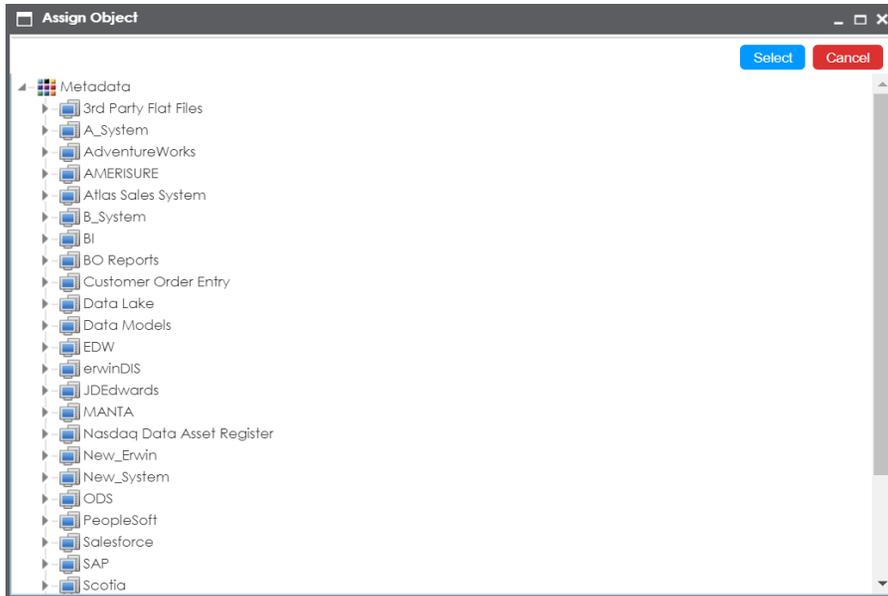
Name	Created By	Created Date	Modified By	Modified Date	Options
<input type="text"/>					

5. Click **New Assignment**.

The Assign To page appears.

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

The Assign Object page appears.



7. Select the desired system.

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

8. Click **Select**.

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

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

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

10. Select the appropriate **Roles**.

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

12. Click **Save**.

The workflow is assigned to the system.

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

Executing Workflows for Environments

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

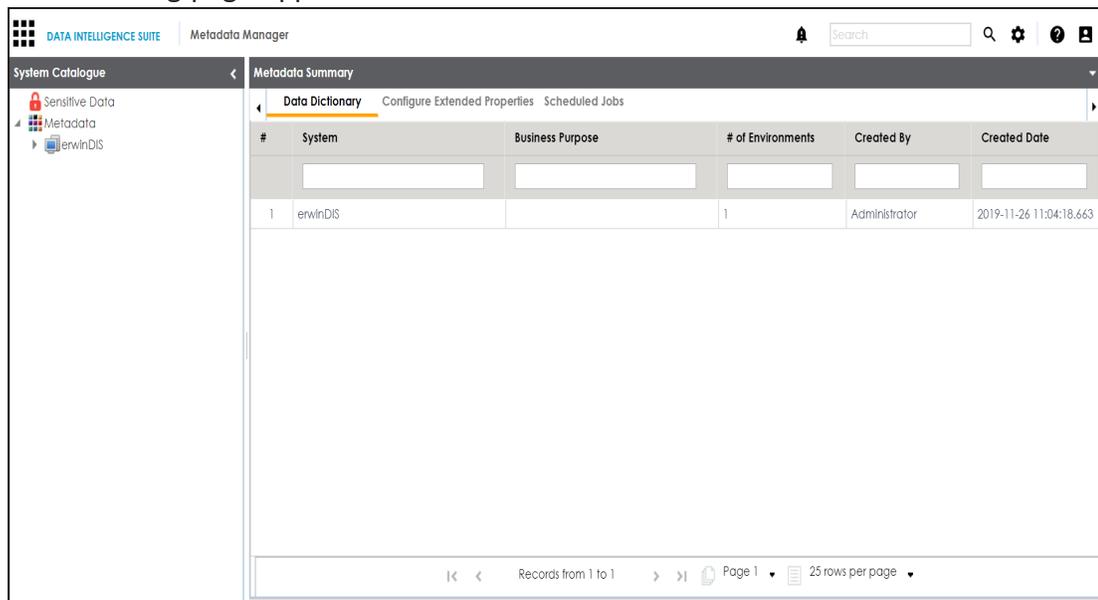
Executing workflows involves:

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

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

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

The following page appears.



The screenshot shows the Metadata Manager interface. On the left is the System Catalogue with a tree view containing 'Sensitive Data', 'Metadata', and 'erwinDIS'. The main area displays the 'Metadata Summary' for 'erwinDIS', with tabs for 'Data Dictionary', 'Configure Extended Properties', and 'Scheduled Jobs'. A table lists the metadata entries:

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

At the bottom, there is a pagination control showing 'Records from 1 to 1', 'Page 1', and '25 rows per page'.

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

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

My Workflow Queue

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

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

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

Records from 1 to 25 of 441

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

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	erwinDIS	Environment	erwin_DIS		Draft	Object created and moved to draft	Administrator	11/26/2019 11:25:42

Records from 1 to 1 of 1

5. Click the desired <Object Name> which appears as hyperlink.
The Environment View page appears.

The screenshot shows the 'Environment View' window with the 'Environment Details' tab selected. The 'Configuration Details' section is active, displaying various fields for database configuration. The 'Miscellaneous' section is also visible. A 'Send To - Review' button is located in the top right corner.

Field	Value
Status	Draft
System Environment Name*	erwin_DIS
System Environment Type*	Production
Data Steward	-Select Data Steward-
Server Platform	<input type="checkbox"/> Apply To All Tables & Columns
Server OS Version	
File Management Type	
File Location	
Production System Name	Choose Production System
Production Environment Name	
Version	1.00
Version Label	
Driver Name*	com.microsoft.sqlserver.jdbc.SQLServe
DBMS Name/DSN*	erwinDG10_GA11
IP Address/Host Name*	localhost
Port	1433
User Name*	sa
Password*	<input type="password"/>
Save Password	<input checked="" type="checkbox"/>
Uti*	<input type="password"/>
DBMS Instance Schema	DBO
Connection Pool Type*	HIKARICP
Number of Partitions*	2
Minimum Connections Per Partitions*	

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

The screenshot shows the 'Workflow Change Description' window. It features a large text area for entering comments, a 'Save & Send' button, and a 'Comments*' label.

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.

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

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

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

Assigning Workflows to Tables

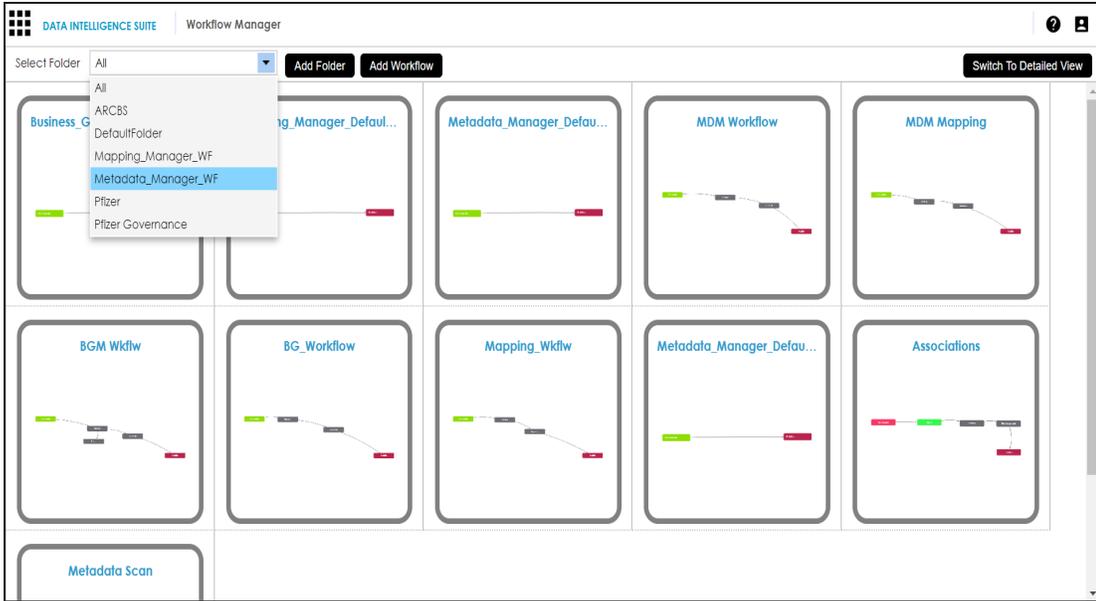
After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to tables in the Metadata Manager.

You should take a note of the following things:

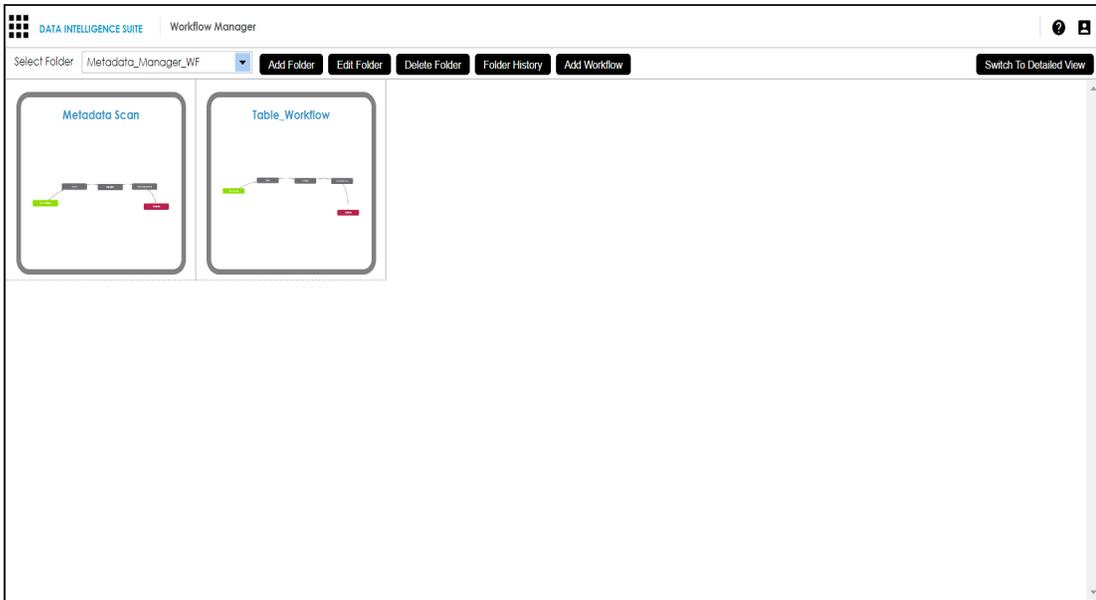
- Ensure that you specified the module as **Metadata Manager** and the object as **Table** while adding the workflow to the folder.
- The default workflow, Metadata_Manager_Default_Workflow_1 is assigned to all the tables. Hence, you need to override the existing default workflow.

To re-assign workflows to Tables in the Metadata Manager, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select the desired folder.



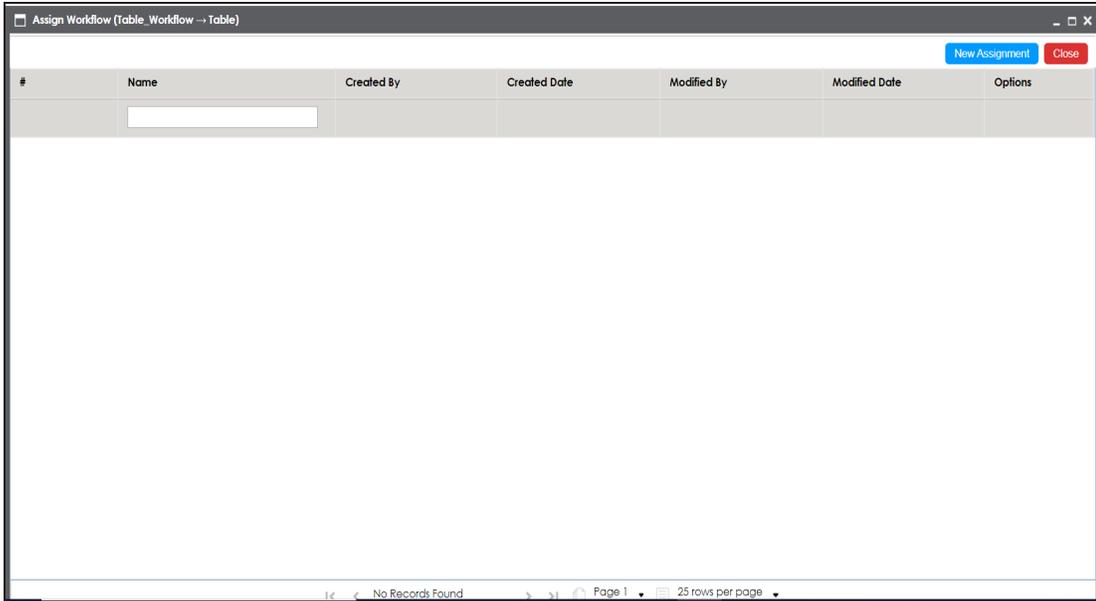
All the workflows in the folder appear.



3. Hover over the desired workflow.

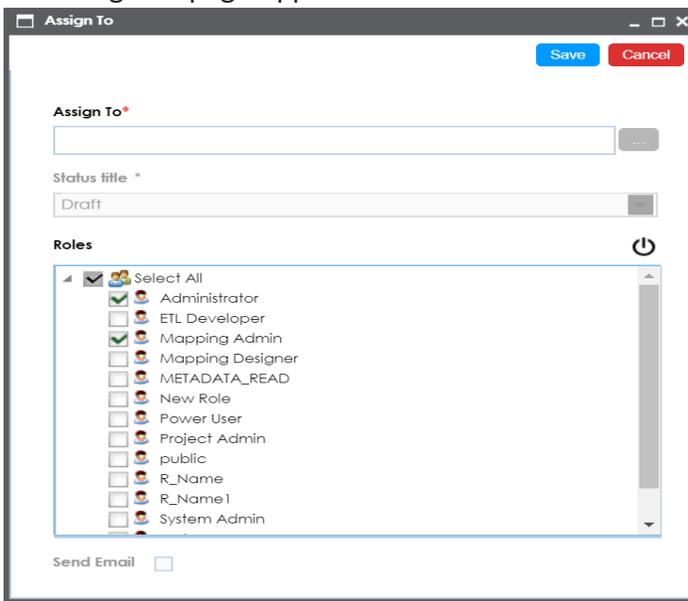
4. Click .

The following page appears.



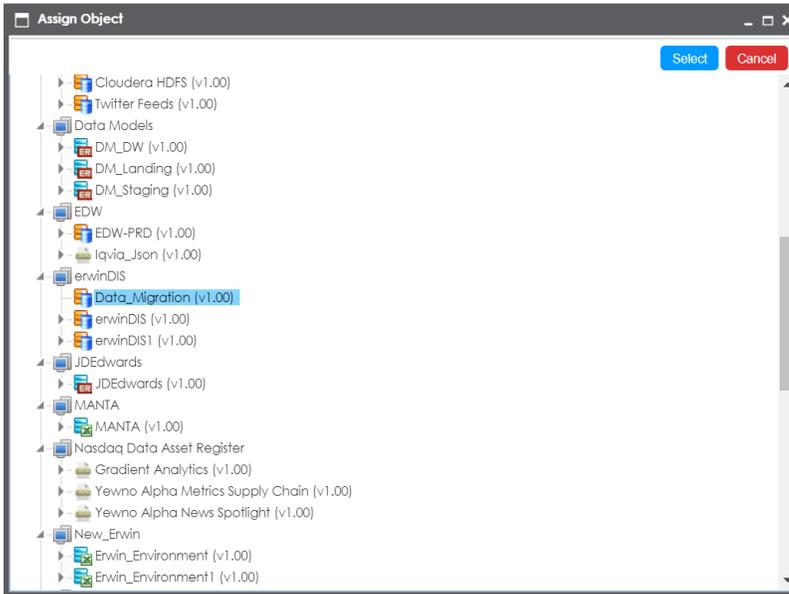
5. Click **New Assignment**.

The Assign To page appears.



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

The Assign Object page appears.



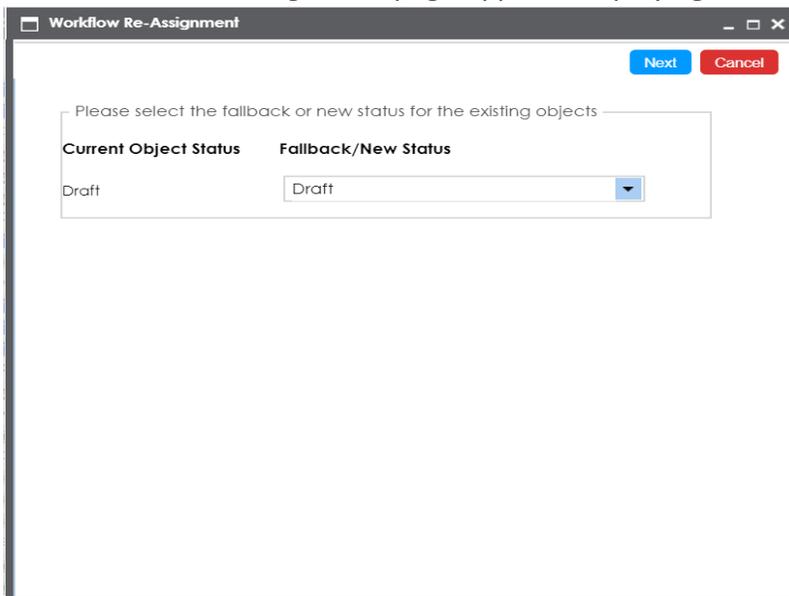
7. Click the Environment containing the desired table.

8. Click **Select**.

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

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

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



10. Select the appropriate Fallback/New Status.

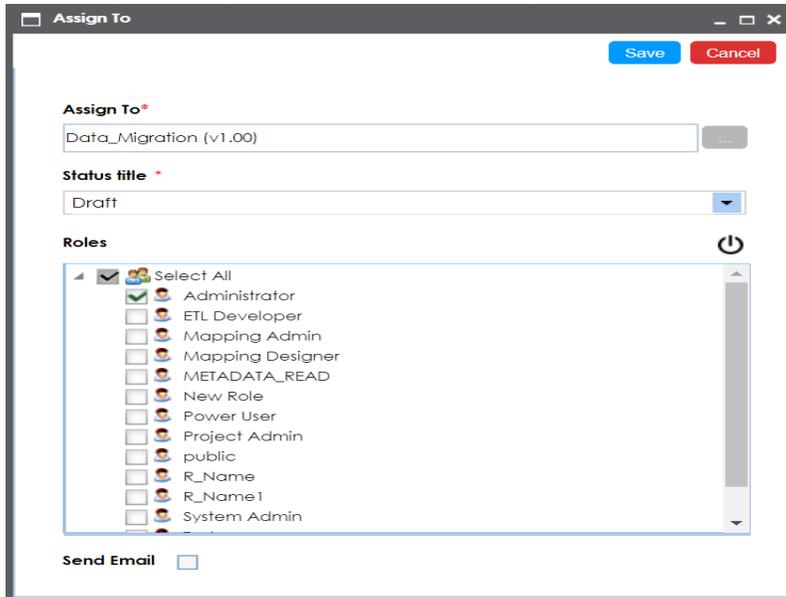
The options for Fallback/New Status depends on the [stages defined in the workflow](#).

11. Click **Next**.

The Comments page appears.

12. Enter relevant comments, and click .

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



The screenshot shows the 'Assign To' dialog box. The 'Assign To' field is populated with 'Data_Migration (v1.00)'. The 'Status title' dropdown menu is set to 'Draft'. The 'Roles' section is expanded, showing a list of roles with checkboxes: Administrator (checked), ETL Developer, Mapping Admin, Mapping Designer, METADATA_READ, New Role, Power User, Project Admin, public, R_Name, R_Name1, and System Admin. At the bottom, there is a 'Send Email' checkbox.

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

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

14. Select the appropriate **Roles**.

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

16. Click **Save**.

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

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

Executing Workflows for Tables

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

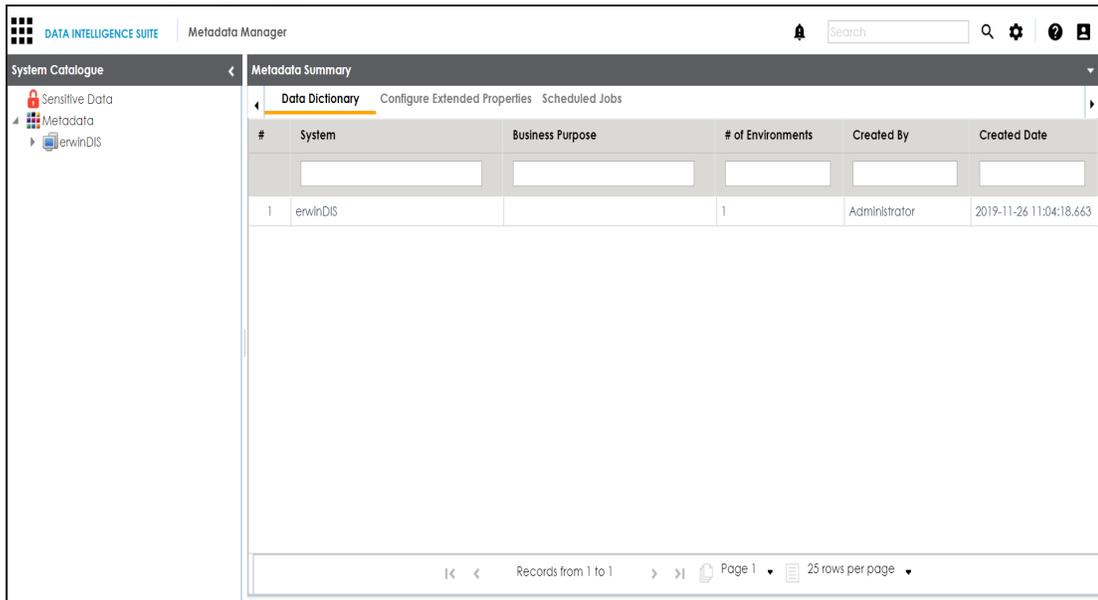
Executing workflows involves:

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

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

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

The following page appears.



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

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

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

My Workflow Queue

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

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

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

Records from 1 to 25 of 441

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

The search results are displayed.

My Workflow Queue

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

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

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

Records from 1 to 1 of 1

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

The Table View page appears.

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

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

The Workflow Change Description page appears.

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

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

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

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

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

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

Assigning Workflows to the Columns

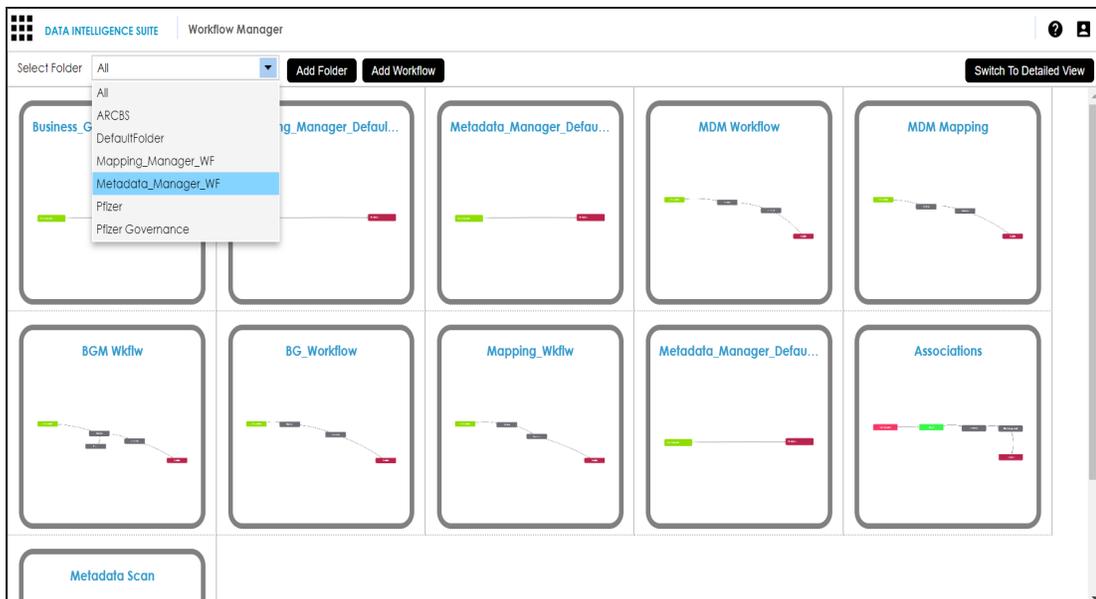
After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to columns in the Metadata Manager.

You should take a note of the following things:

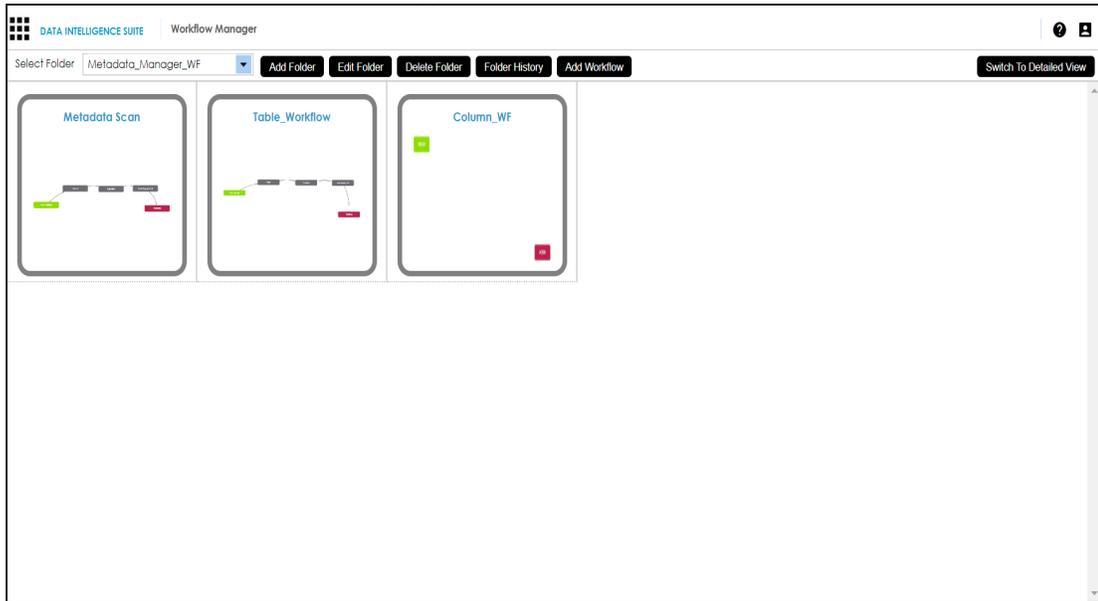
- Ensure that you specified the module as **Metadata Manager** and the object as **Column** while adding the workflow to the folder.
- The default workflow, Metadata_Manager_Default_Workflow is assigned to all the columns. Hence, you need to override the existing default workflow.

To re-assign workflows to columns in the Metadata Manager, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select the desired folder.



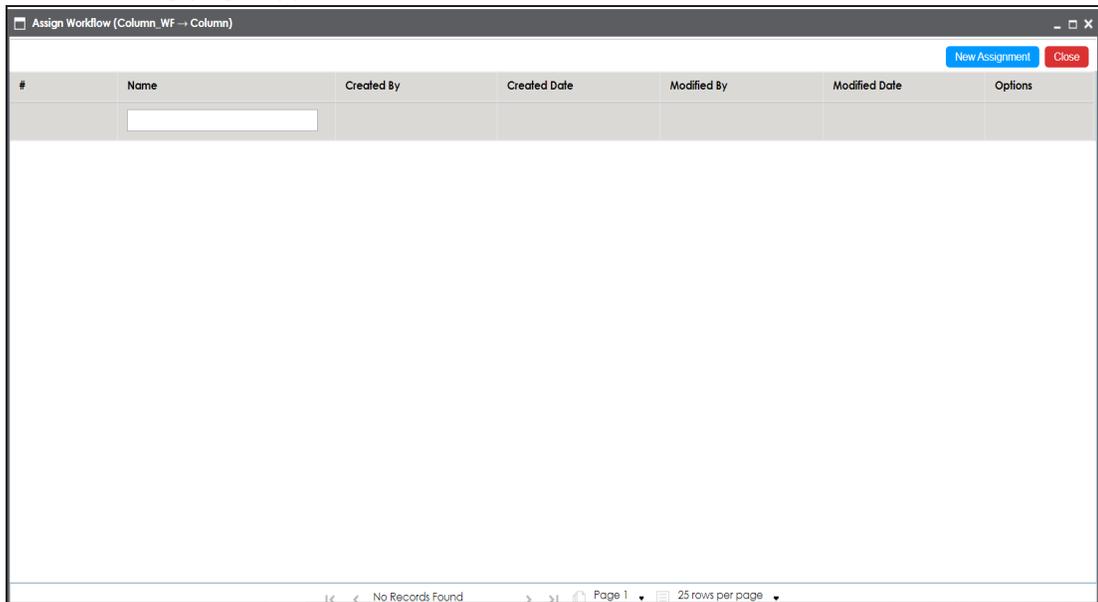
All the workflows in the folder appear.



3. Hover over the desired workflow.

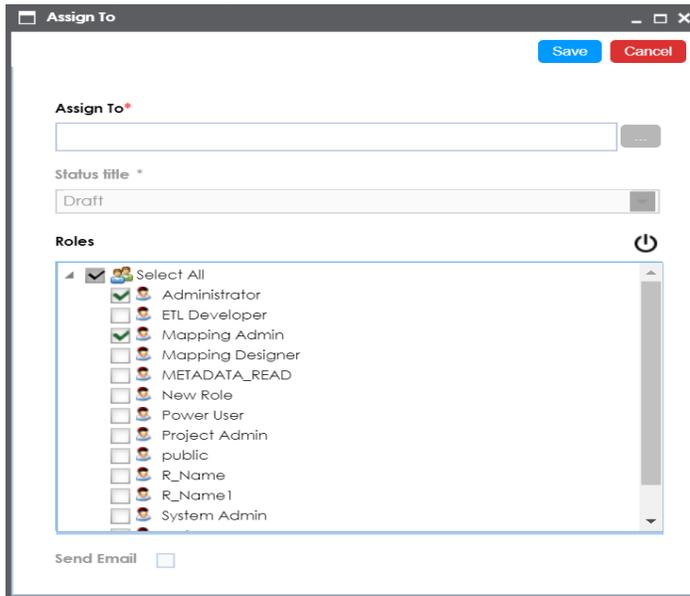
4. Click .

The following page appears.



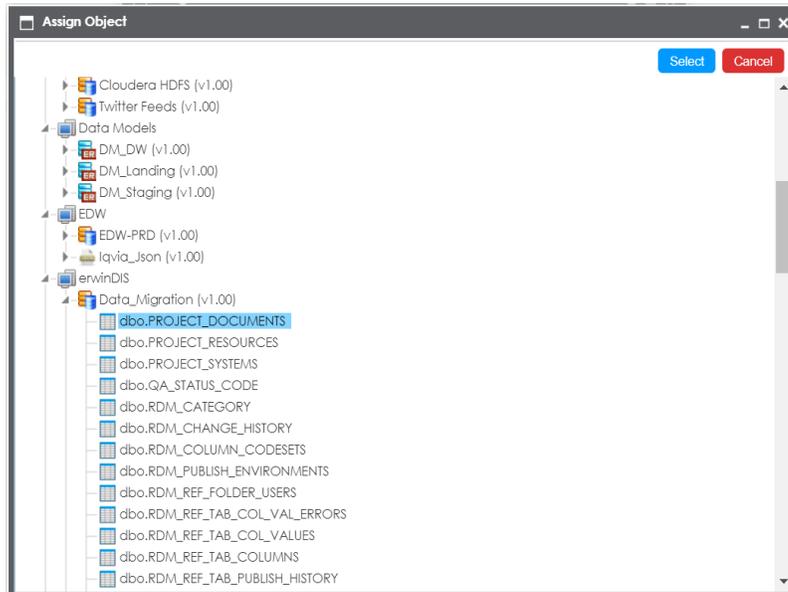
5. Click **New Assignment**.

The Assign To page appears.



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

The Assign Object page appears.



7. Click the table containing the desired column and click **Select**.

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

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

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

Current Object Status	Fallback/New Status
Draft	Draft

9. Select the appropriate Fallback/New Status.

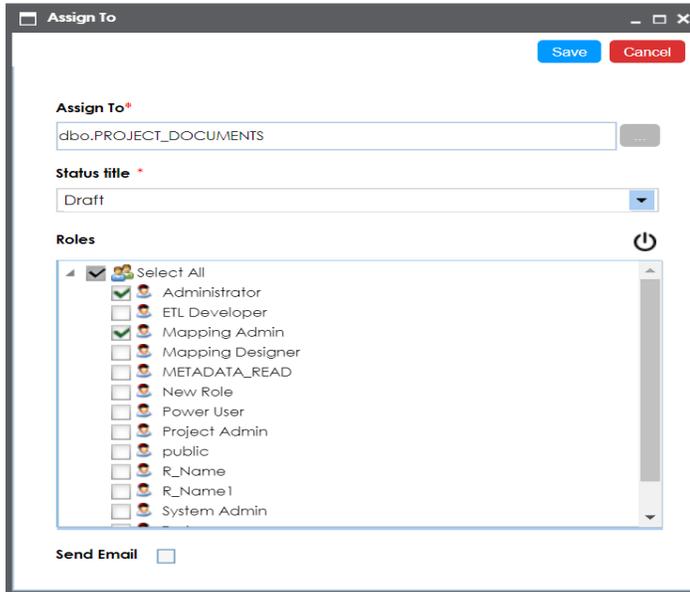
The options for Fallback/New Status depends on the [stages defined in the workflow](#).

10. Click **Next**.

The Comments page appears.

11. Enter relevant comments, and click .

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



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

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

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

Executing Workflows for Columns

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

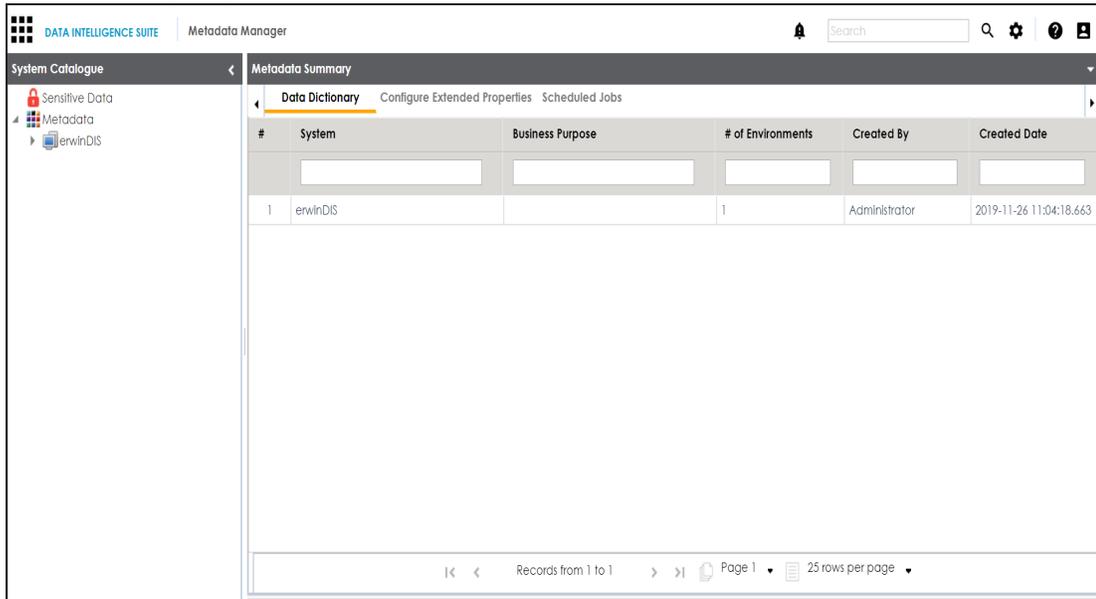
Executing workflows involves:

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

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

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

The following page appears.



The screenshot shows the 'Metadata Manager' interface. On the left is a 'System Catalogue' sidebar with a tree view containing 'Sensitive Data', 'Metadata', and 'erwinDIS'. The main area is titled 'Metadata Summary' and contains a table with the following data:

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

At the bottom of the table, there is a pagination control showing 'Records from 1 to 1', 'Page 1', and '25 rows per page'.

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

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

My Workflow Queue

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

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

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

Records from 1 to 25 of 441

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

The search results are displayed.

My Workflow Queue

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

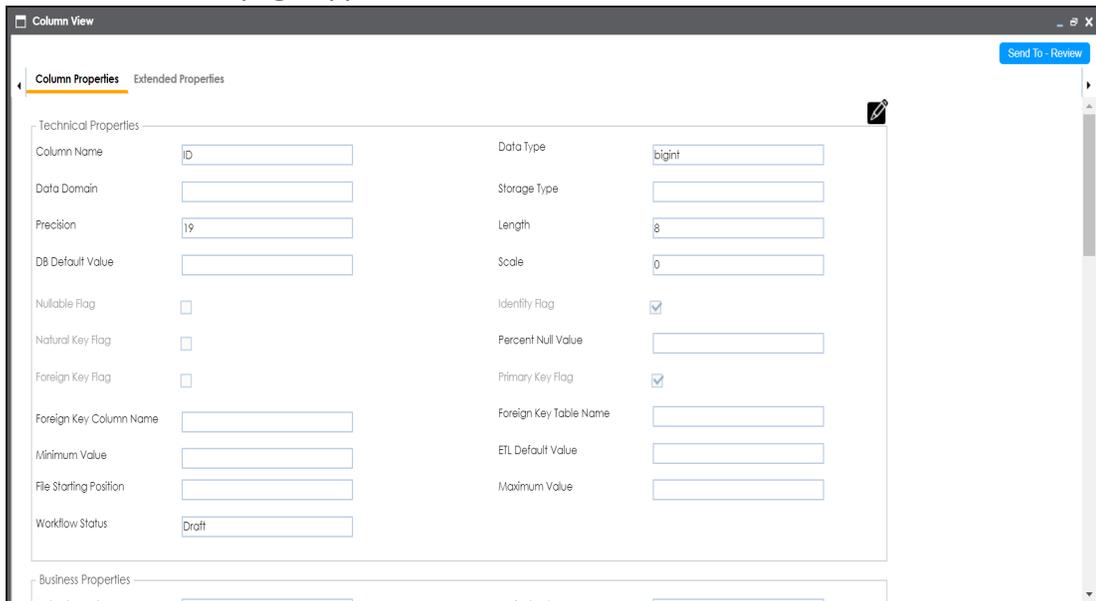
Bulk Update : OFF Workflow : Assigned Object : Status Title : Trigger On :

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

Records from 1 to 25 of 108

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

The Column View page appears.

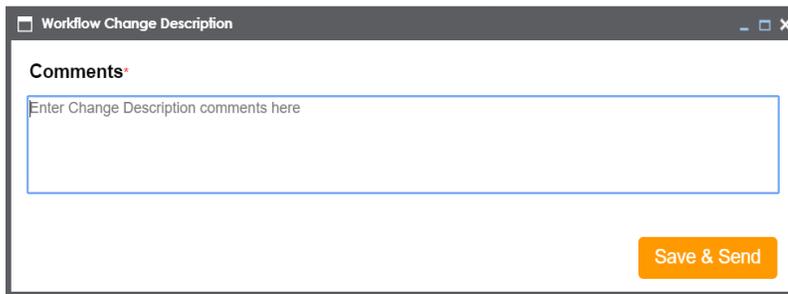


The screenshot shows a window titled "Column View" with a "Send To - Review" button in the top right. The main content area is divided into "Technical Properties" and "Business Properties". Under "Technical Properties", the following fields are visible:

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

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 window titled "Workflow Change Description" with a "Save & Send" button in the bottom right. The main content area is titled "Comments" and contains a text input field with the placeholder text "Enter Change Description comments here".

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

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

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

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

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

Managing Business Glossary Manager Workflows

You can create business glossary manager workflows for three objects:

- Business terms
- Business rules
- Business policies

Creating and configuring business glossary manager workflows involves:

1. [Adding folders](#)
2. [Adding workflows to the folders](#)
3. [Configuring the Generic 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 work flow 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

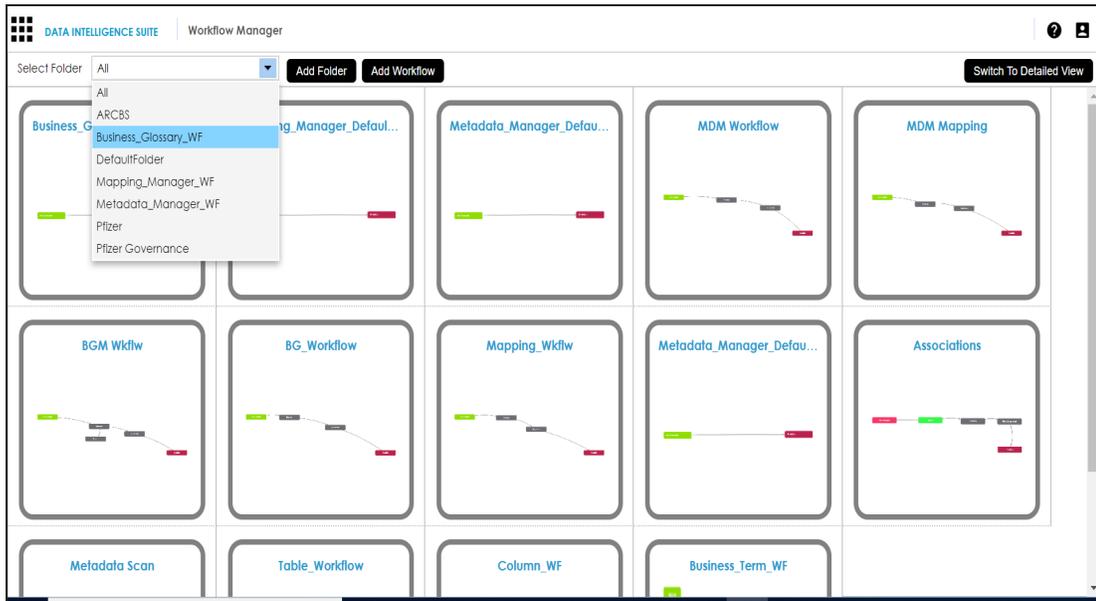
After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to business terms in the Business Glossary Manager.

You should take a note of the following things:

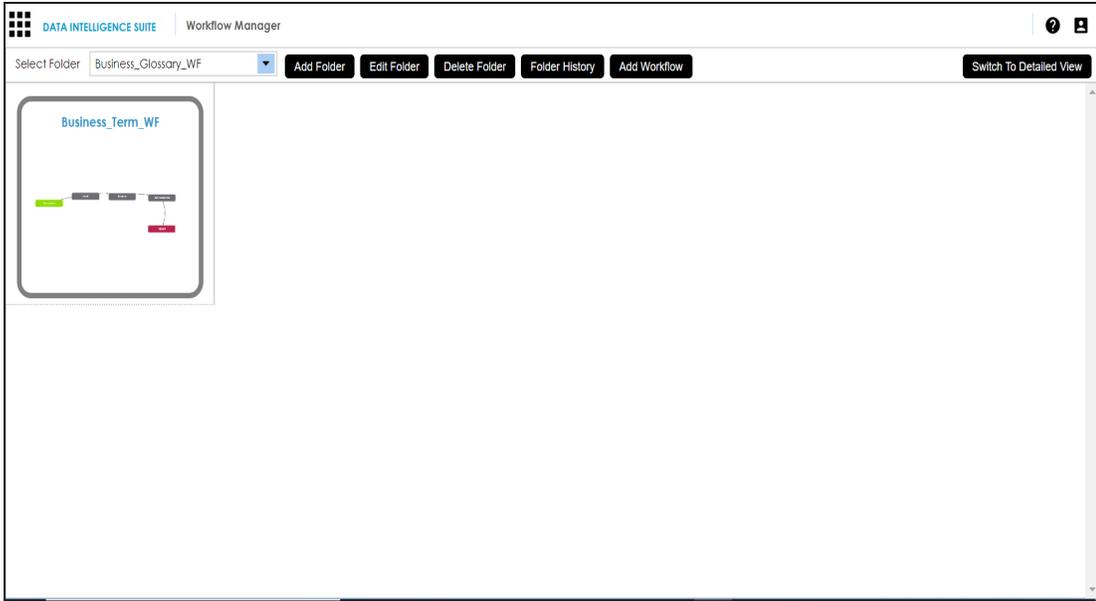
- Ensure that you specified the module as **Business Glossary Manager** and the object as **Business Term** while adding the workflow to the folder.
- The default workflow, `Business_Glossary_Default_Workflow` is assigned to all the business terms. Hence, you need to override the existing default workflow.

To re-assign workflows to the business terms, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select the folder where you added the workflow.



All the workflows added to the folder appear.



3. Hover over the workflow to be assigned.

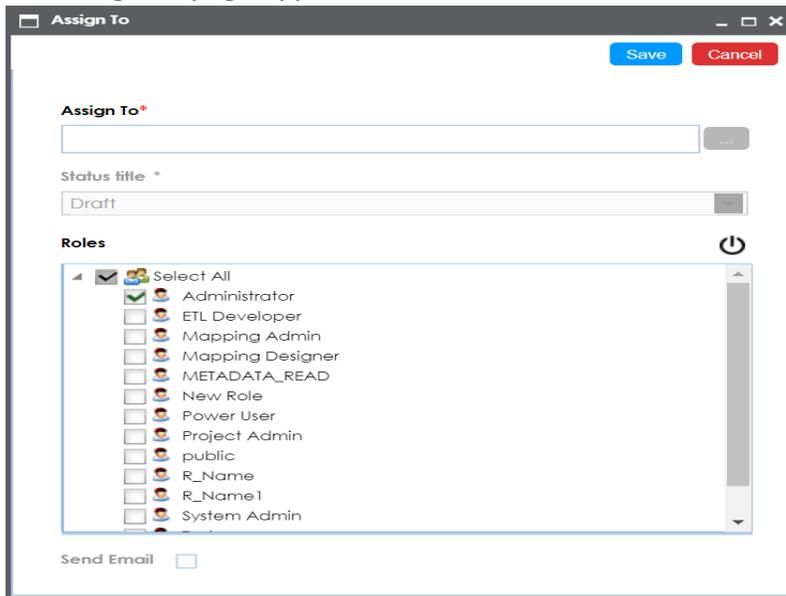
4. Click .

The following page appears.

							New Assignment	Close
Name	Created By	Created Date	Modified By	Modified Date	Options			
<input type="text"/>								

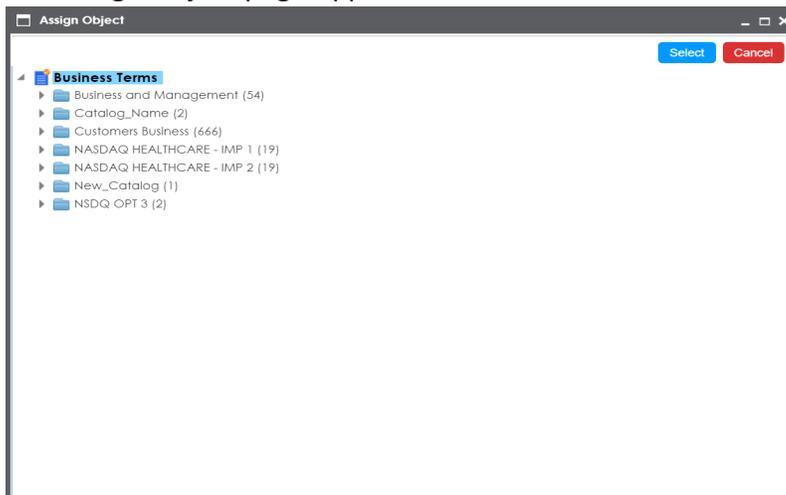
5. Click **New Assignment**.

The Assign To page appears.



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

The Assign Object page appears.



7. Click the catalog which contains the business term to be assigned and click **Select**.
A warning message appears.
8. 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.

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

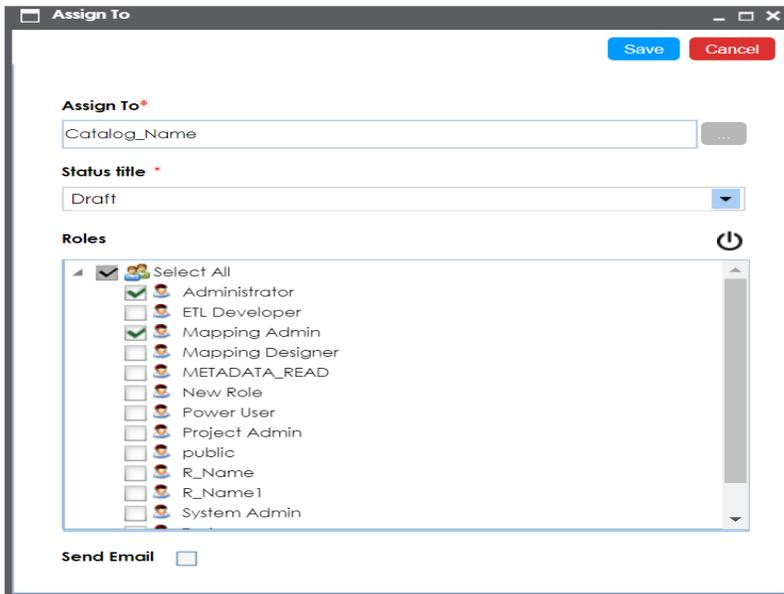
9. Select the appropriate **Fallback/New Status**.

10. Click **Next**.

The Comments page appear.

11. Enter relevant comments, and click .

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



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

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

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

Executing Workflows for Business Terms

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

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

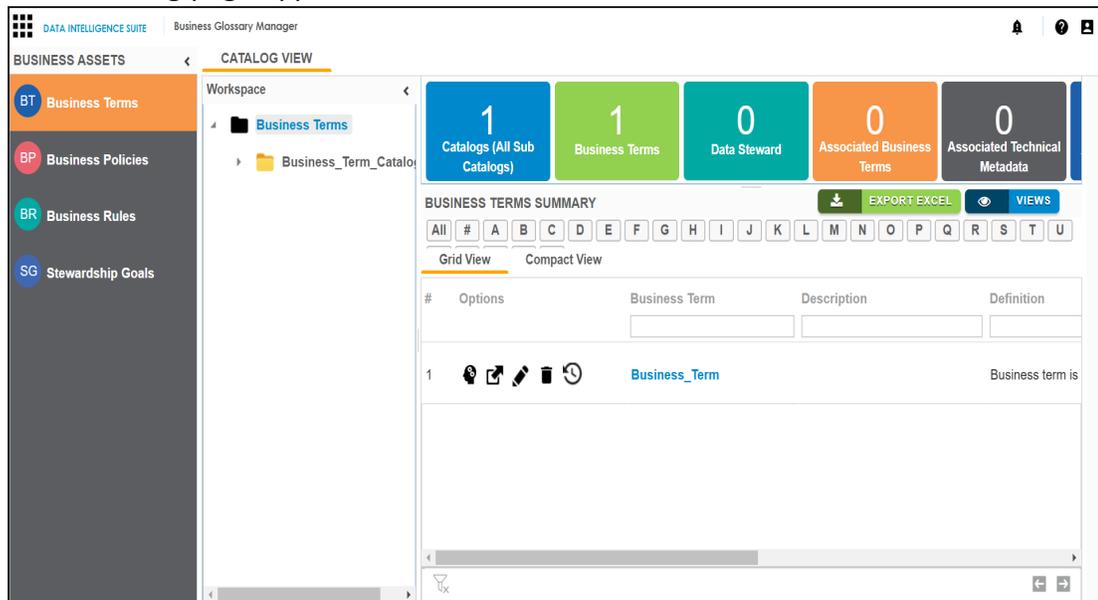
Executing workflows involves:

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

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

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

The following page appears.



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

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

My Workflow Queue

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

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

#	Object Path	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Customers Business/Customers Business As Is/Information/Custom Management	3rd Party Preference Option Code		Draft	(System Generated) Business Term updated.	Administrator	11/05/2019 14:38:01
18	Customers Business/Customers Business As Is/Information/Account Management	Access Group		Draft	(System Generated) Business Term updated.	Administrator	08/22/2019 11:59:17
20	Customers Business/Customers Business As Is/Information/Account Management	Account		Draft	Object created and moved to draft	Administrator	07/01/2019 09:31:13
21	Customers Business/Customers Business As Is/Information/Account Management	Account		Draft	Object created and moved to draft	Administrator	07/01/2019 09:31:13
22	Customers Business/Customers Business As Is/Information/Account Management	Account Category		Draft	Object created and moved to draft	Administrator	07/01/2019 09:31:13
23	Customers Business/Customers Business As Is/Information/Account	Account Category		Draft	Object created and moved to draft	Administrator	07/01/2019 09:31:13

Records from 1 to 25 of 1501

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

The search result appears.

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	Catalog_Name	Business Term	Business_Term	It relates to technical metadata.	Draft	It should be assigned the workflow.	Administrator	11/25/2019 19:18:42
2	Business_Policy_Catalog	Business Policy	Business_Policy		Pending Final Approval	It is recommended to move the object to the next step.	Administrator	11/25/2019 18:32:24

Records from 1 to 2 of 2

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

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

Audit Details	
Created By	Administrator
Created Date Time	11/25/2019 19:18:01
Modified By	Administrator
Modified Date Time	11/25/2019 19:18:42

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

The Workflow Change Description page appears.

Enter Change Description comments here

Save & Send

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

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

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

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

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

Assigning Workflows to Business Rules

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

You should take a note of the following things:

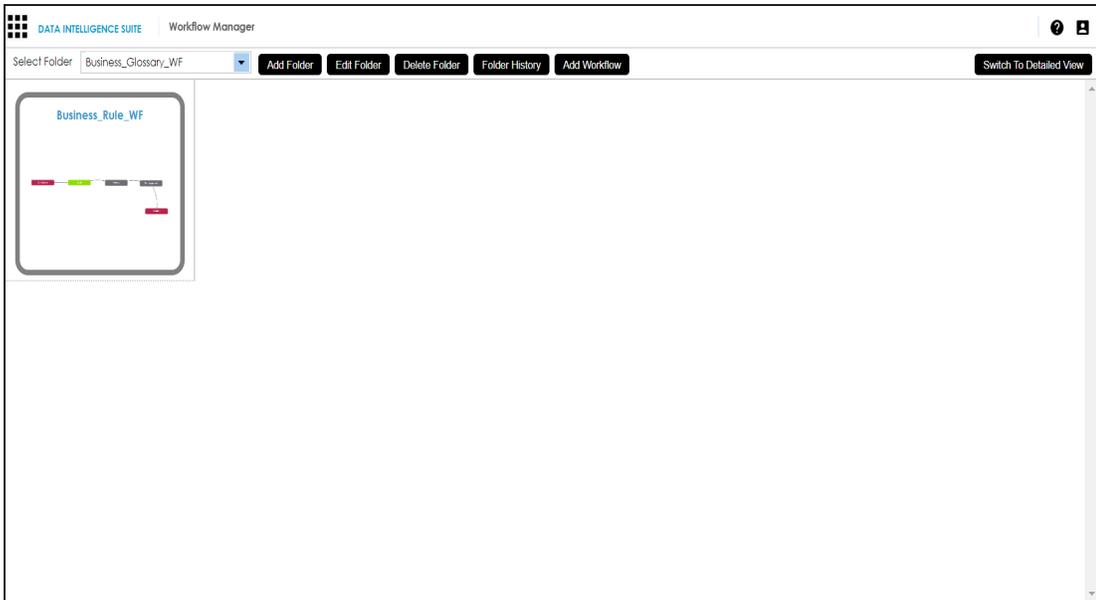
- Ensure that you specified the module as **Business Glossary Manager** and the object as **Business Rule** while adding the workflow to the folder.
- You should assign the workflow to the business rule catalog before creating the business rule.
- The workflow assigned to a business rule catalog applies to all the business rule under the catalog.

To assign workflows to business rules, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select the folder where you added the workflow.



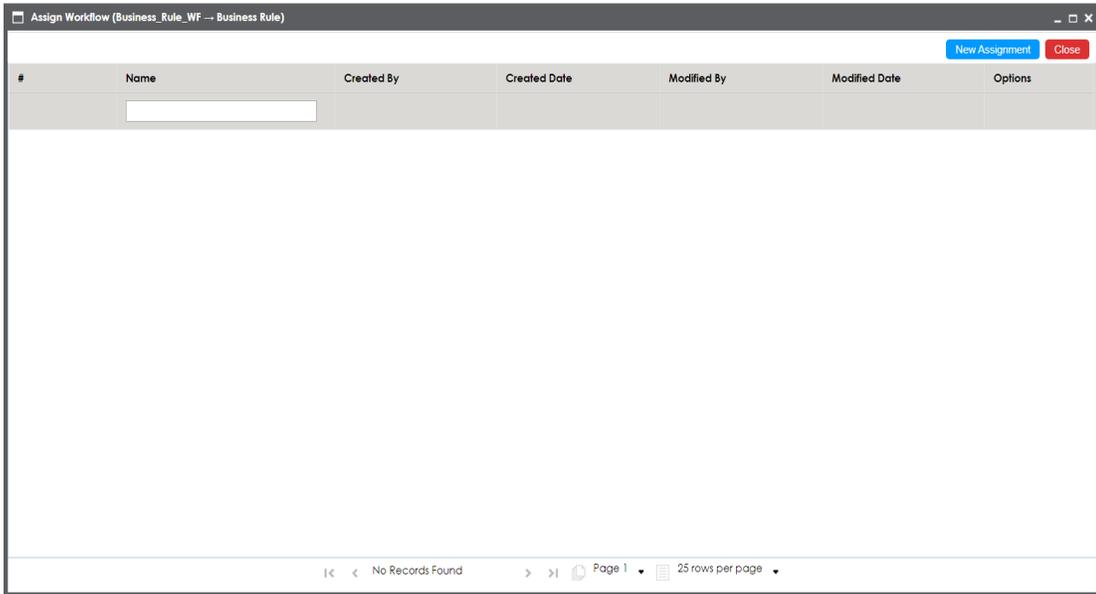
All the workflows added to the folder appear.



3. Hover over the workflow to be assigned.

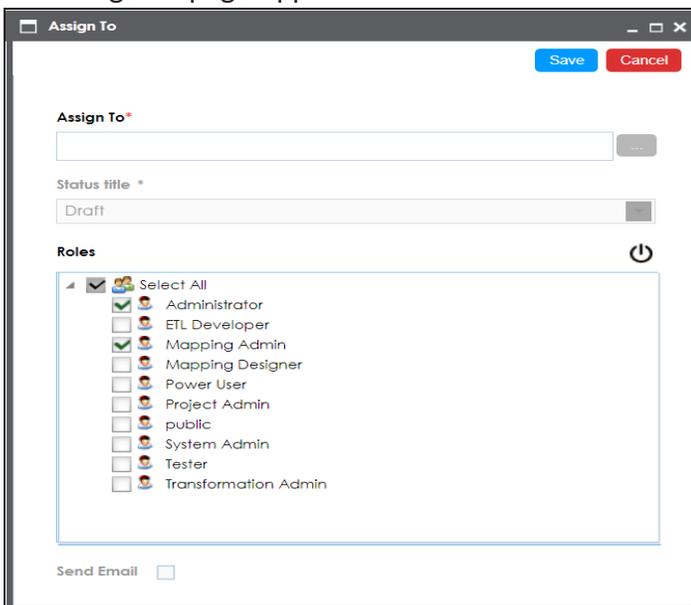
4. Click .

The following page appears.



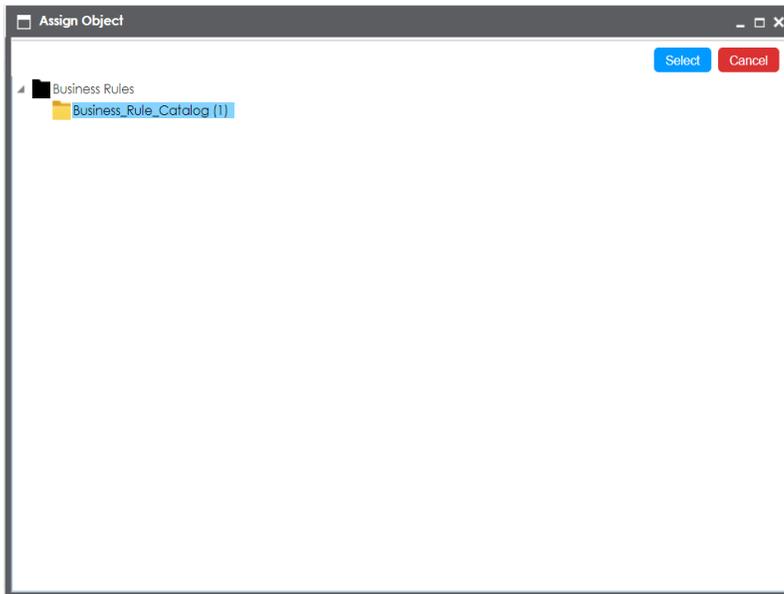
5. Click **New Assignment**.

The Assign To page appears.

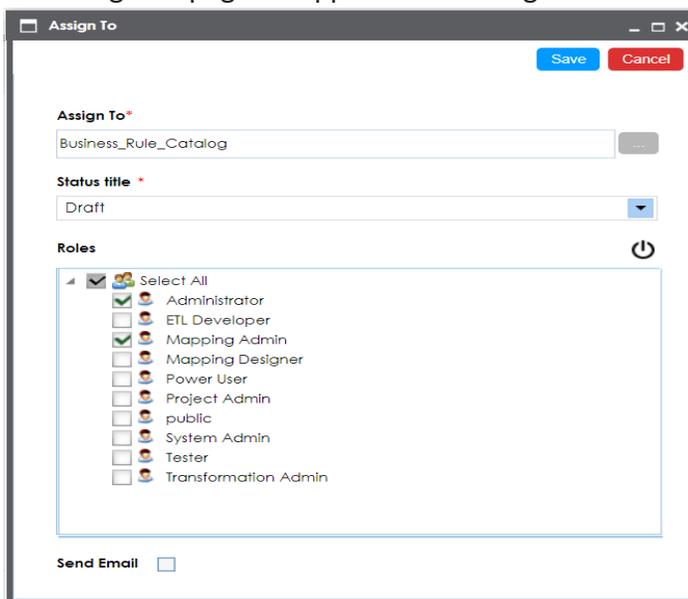


6. In **Assign To** field, click .

The Assign Object page appears.



7. Click the catalog which contains the business rule to be assigned and click **Select**.
8. The Assign To page re-appears with Assign To field filled.



9. Select the appropriate **Status Title** from which the workflow starts.
A Status Title is assigned to a stage while creating the stage.

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

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

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

Executing Workflows for Business Rules

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

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

Executing workflows involves:

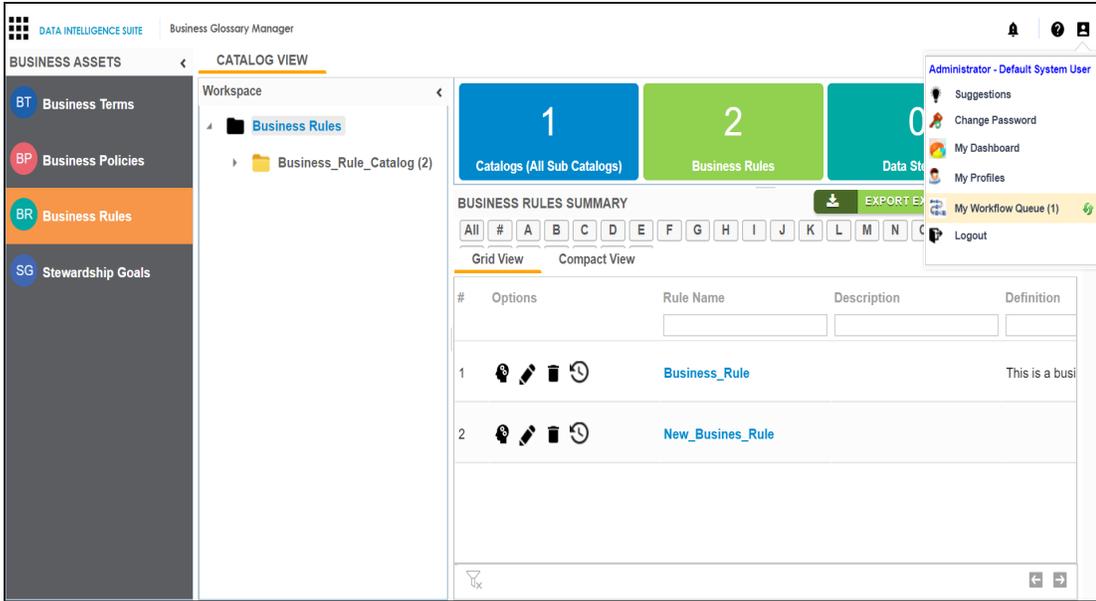
1. Receiving workflow queue notifications
2. Examining and moving the business rules to the next stage

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

To execute workflows for business rules, follow these steps:

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

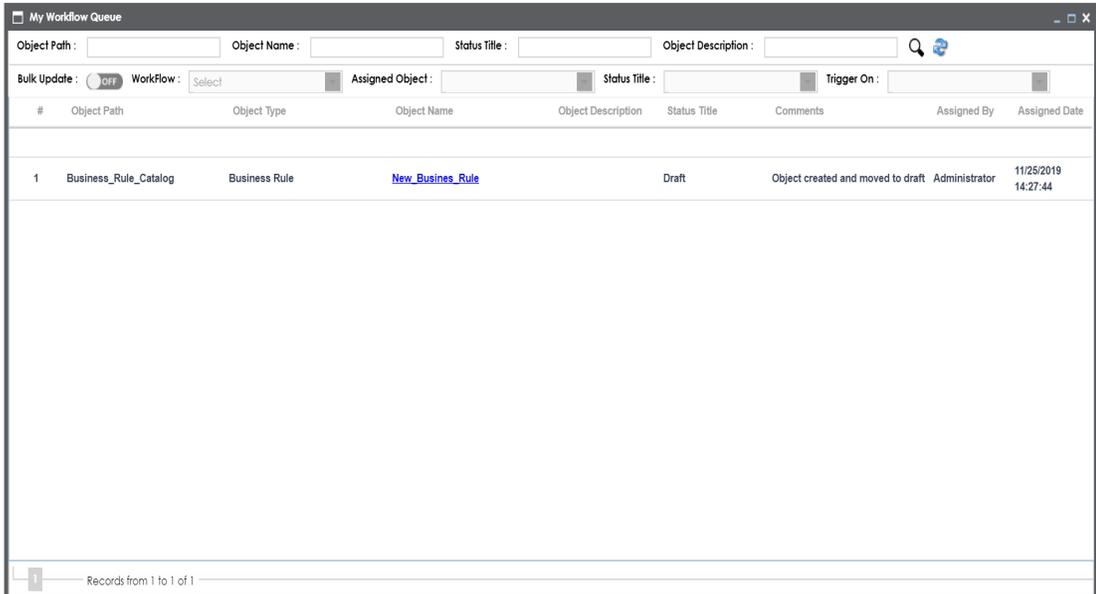
The Options menu appears.



3. Click **My Workflow Queue**.

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

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

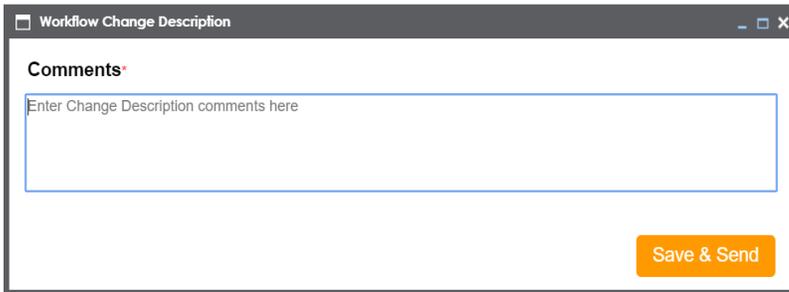


4. Click the <Object Name> appearing as a hyperlink.

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

5. 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 window titled "Workflow Change Description". Inside the window, there is a section labeled "Comments" with a text input field containing the placeholder text "Enter Change Description comments here". Below the input field is an orange button labeled "Save & Send".

6. Enter change description comments.

7. Click **Save & Send**.

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

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

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

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

Assigning Workflows to Business Policies

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

You should take a note of the following things:

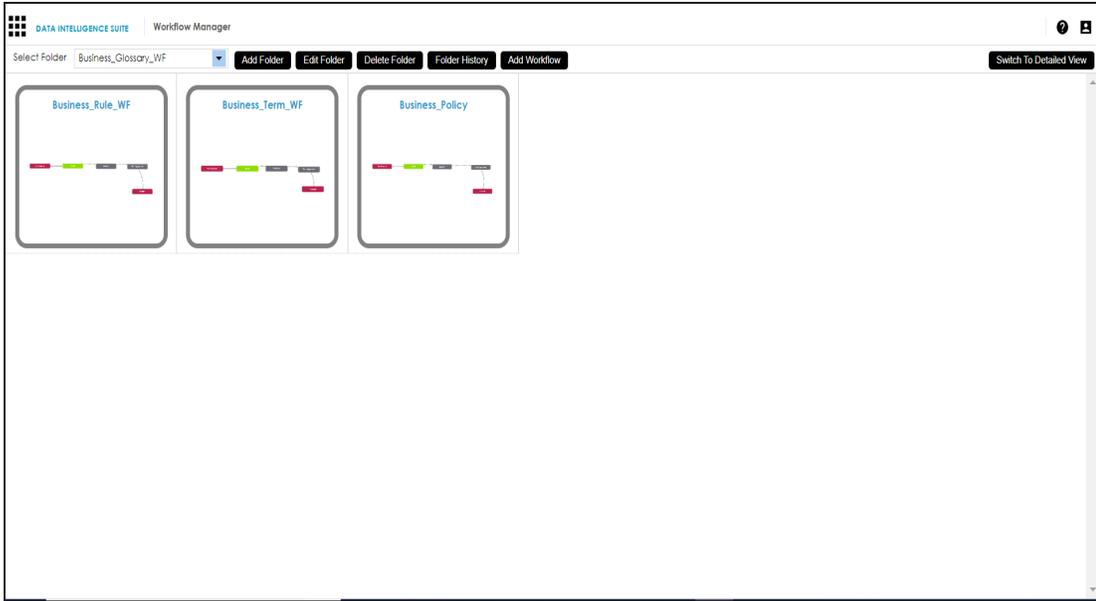
- Ensure that you specified the module as **Business Glossary Manager** and the object as **Business Policy** while adding the workflow to the folder.
- You should assign the workflow to the business policy catalog before creating the business policy.
- The workflow assigned to a business policy catalog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

To assign workflows to business policies, follow these steps:

1. Go to **Application Menu > Miscellaneous > Workflow Manager**.
2. Select the folder where you added the workflow.



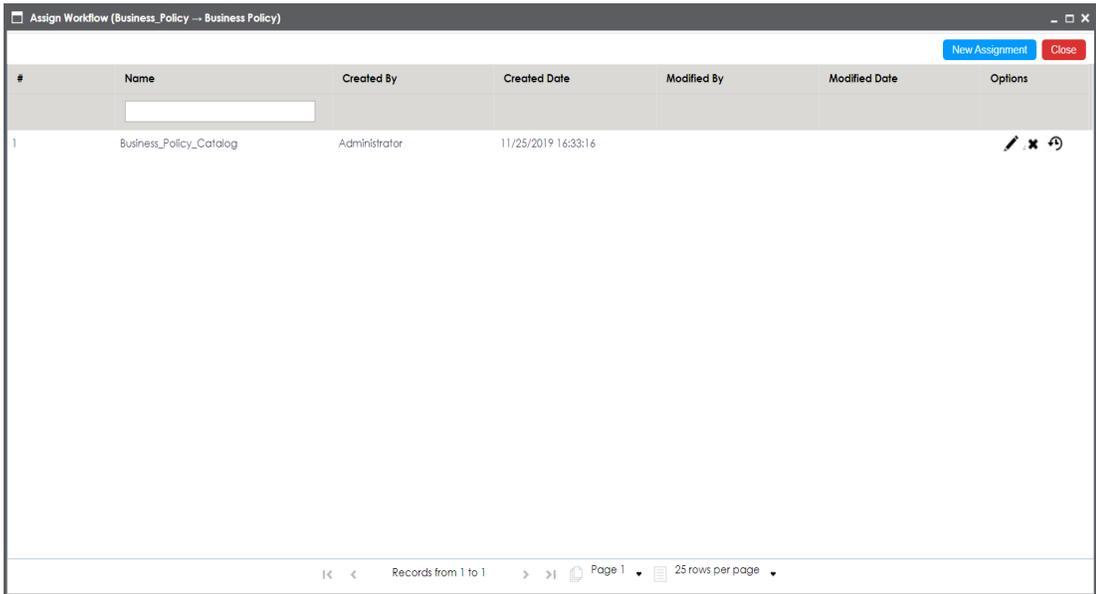
All the workflows added to the folder appear.



3. Hover over the desired workflow.

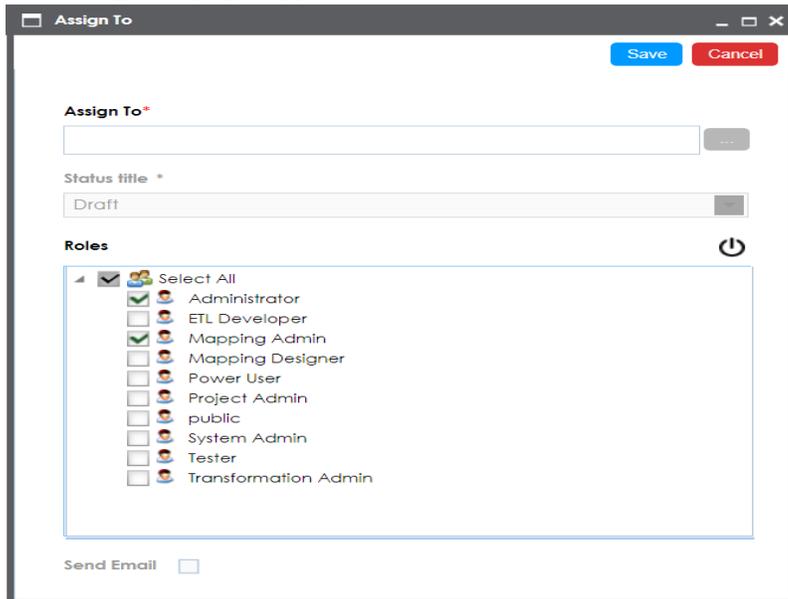
4. Click .

The following page appears.



5. Click **New Assignment**.

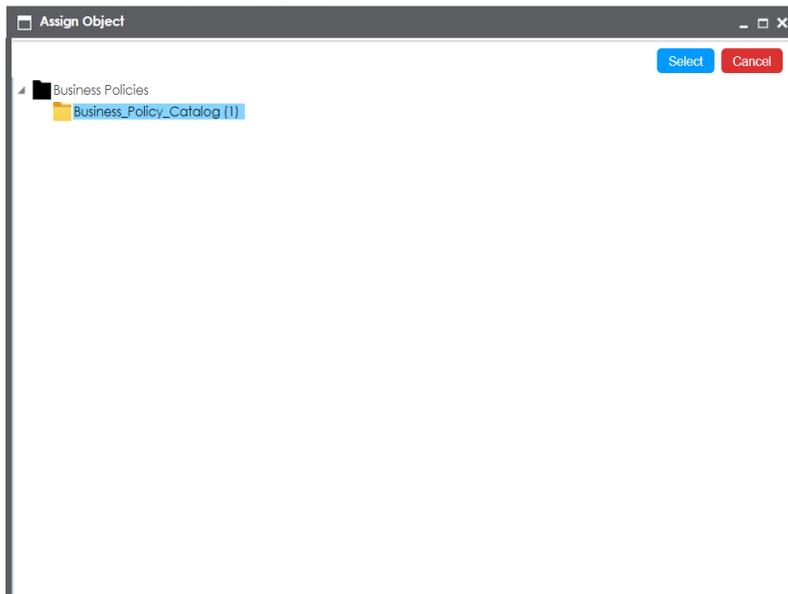
The Assign To page appears.



The 'Assign To' dialog box features a title bar with standard window controls and 'Save' and 'Cancel' buttons. It contains a text input field for 'Assign To*' with a dropdown arrow, a 'Status title*' dropdown menu currently set to 'Draft', and a 'Roles' section with a refresh icon. The roles list includes 'Select All' (checked), 'Administrator' (checked), 'ETL Developer', 'Mapping Admin' (checked), 'Mapping Designer', 'Power User', 'Project Admin', 'public', 'System Admin', 'Tester', and 'Transformation Admin'. A 'Send Email' checkbox is located at the bottom left.

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

The Assign Object page appears.



The 'Assign Object' dialog box has a title bar with window controls and 'Select' and 'Cancel' buttons. It displays a tree view under 'Business Policies' with a single item, 'Business_Policy_Catalog (1)', which is highlighted in blue.

7. Click the desired catalog and click **Select**.

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

The screenshot shows a window titled "Assign To" with a "Save" button and a "Cancel" button. Below the title bar, there is a text input field labeled "Assign To*" containing the text "Business_Policy_Catalog". Below that is a dropdown menu labeled "Status title*" with "Draft" selected. Underneath is a section titled "Roles" with a refresh icon. It contains a list of roles with checkboxes: "Select All" (checked), "Administrator" (checked), "ETL Developer" (unchecked), "Mapping Admin" (checked), "Mapping Designer" (unchecked), "Power User" (unchecked), "Project Admin" (unchecked), "public" (unchecked), "System Admin" (unchecked), "Tester" (unchecked), and "Transformation Admin" (unchecked). At the bottom left, there is a "Send Email" checkbox which is unchecked.

9. Select the appropriate **Status Title** from which the workflow starts.

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

10. Select the appropriate **Roles**.

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

12. Click **Save**.

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

Once the workflow is assigned successfully to a business policy in business glossary manager, users who are part of the assigned roles will get work queue notifications.

For more information on workflow execution via work queue notifications, refer to the [Executing Workflows for Business Policies via the Workflow Queue](#) topic.

Executing Workflows for Business Policies

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

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

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

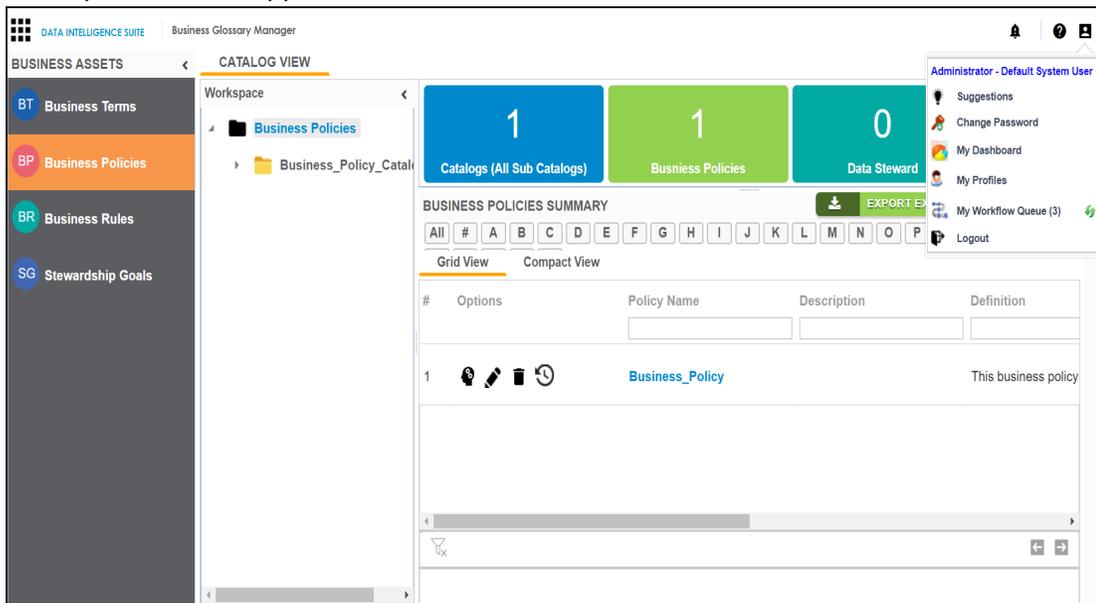
Executing workflows involves:

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

To execute workflows for business policies, follow these steps:

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

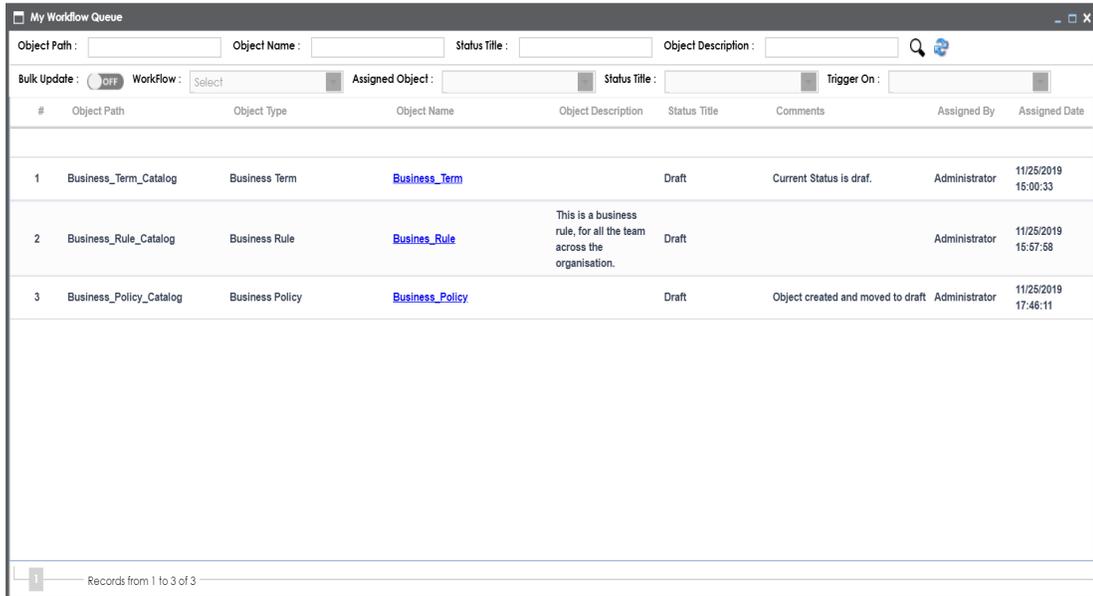
The Options menu appears.



3. Click **My Workflow Queue**.

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

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

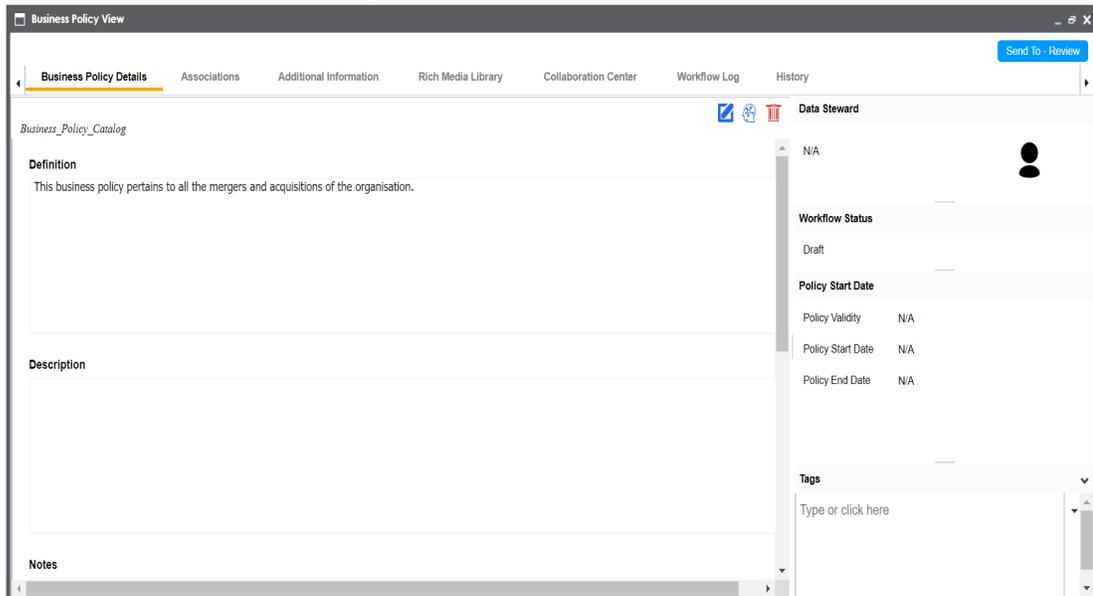


#	Object Path	Object Type	Object Name	Object Description	Status Title	Comments	Assigned By	Assigned Date
1	Business_Term_Catalog	Business Term	Business_Term		Draft	Current Status is draf.	Administrator	11/25/2019 15:00:33
2	Business_Rule_Catalog	Business Rule	Business_Rule	This is a business rule, for all the team across the organisation.	Draft		Administrator	11/25/2019 15:57:58
3	Business_Policy_Catalog	Business Policy	Business_Policy		Draft	Object created and moved to draft	Administrator	11/25/2019 17:48:11

Records from 1 to 3 of 3

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

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



Business Policy View

[Business Policy Details](#) | Associations | Additional Information | Rich Media Library | Collaboration Center | Workflow Log | History

Business_Policy_Catalog Data Steward

Definition
This business policy pertains to all the mergers and acquisitions of the organisation.

Description

Notes

Workflow Status
Draft

Policy Start Date

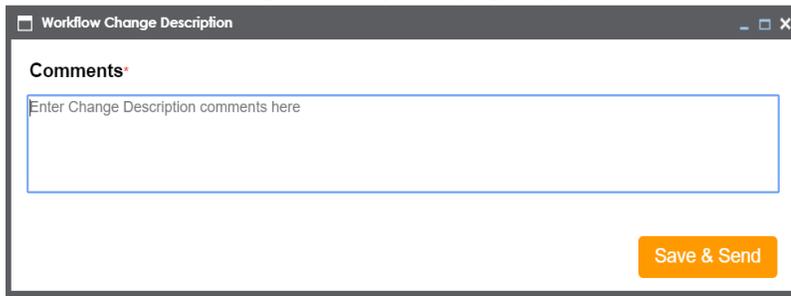
Policy Validity: N/A
Policy Start Date: N/A
Policy End Date: N/A

Tags
Type or click here

[Send To - Review](#)

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

The Workflow Change Description page appears.



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

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

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

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