erwin Data Intelligence Suite

Workflow Management Guide

Release v10.0

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Contents

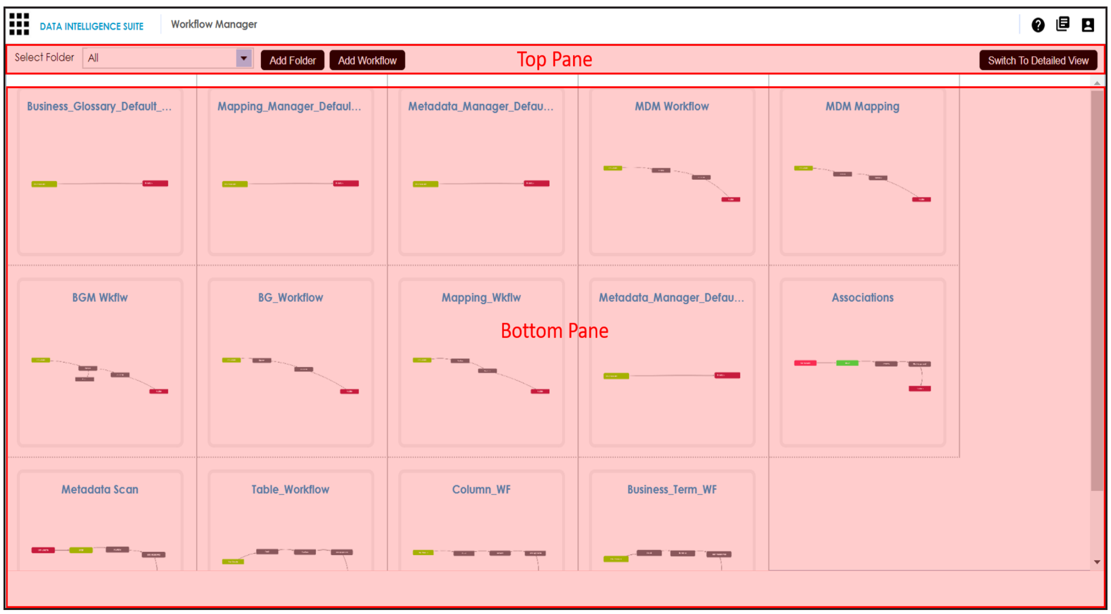
Managing Workflows

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 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

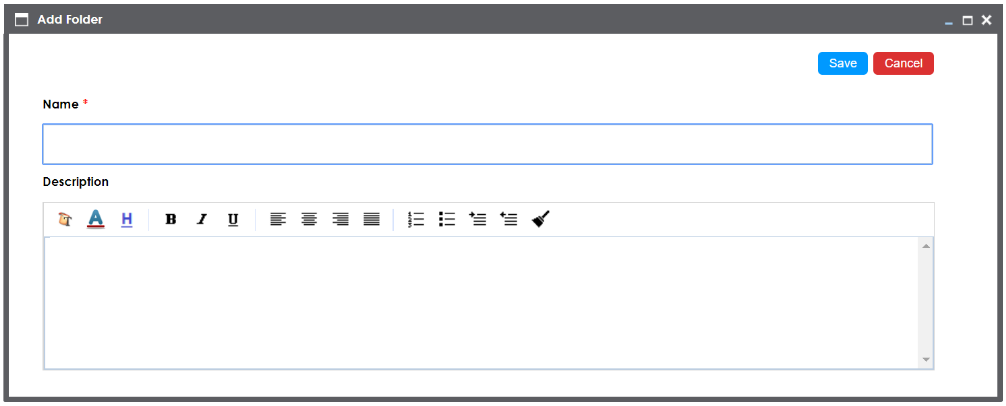
Adding Folders

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:

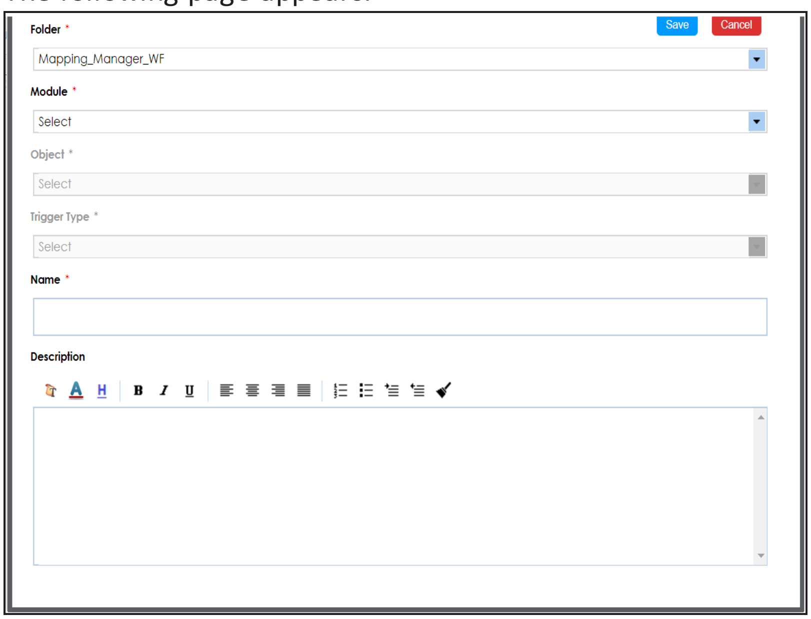
- Business Glossary Manager
- Metadata Manager
- Mapping Manager

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.



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	Specifies the module of the workflow. For example, Mapping Manager. 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.
Object	Specifies the object for which the workflow is being created. For example, Mapping. The object list depends on the module selected.
Trigger Type	Specifies the trigger type for the workflow. For example, On Create.
Name	Specifies the name of the workflow. For example, Map_Wkflw.
Description	Specifies the description about the workflow. For example: The workflow module is Mapping Manager and it is for the mapping object.

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:

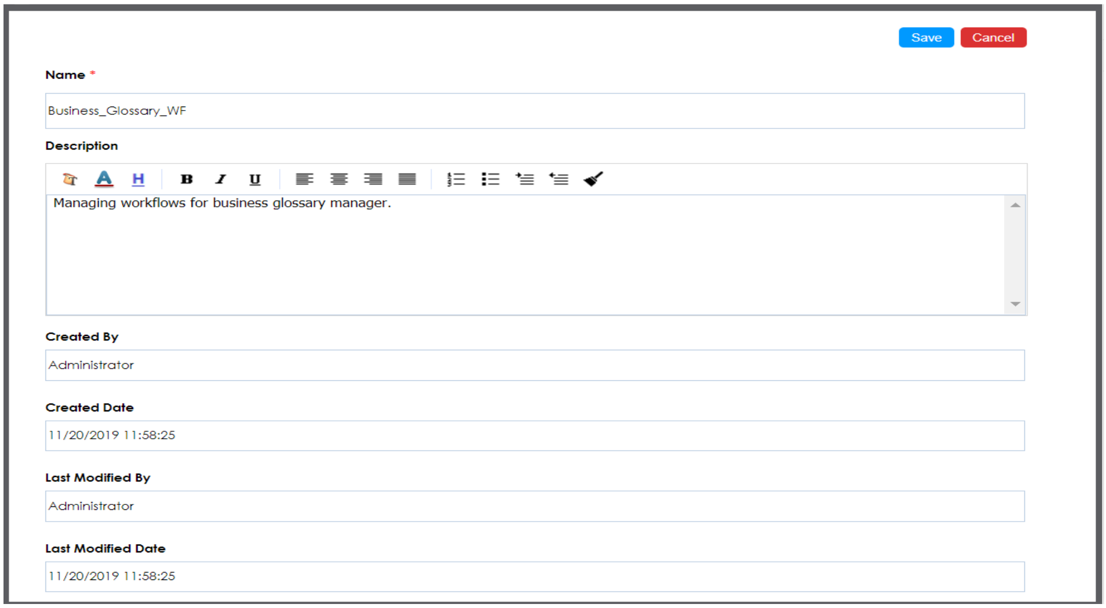
1. Go to **Application Menu** > **Miscellaneous** > **Workflow Manager**.

2. Select the desired folder.

   The following page appears.

3. Click **Edit Folder**.

   The following page appears.



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.

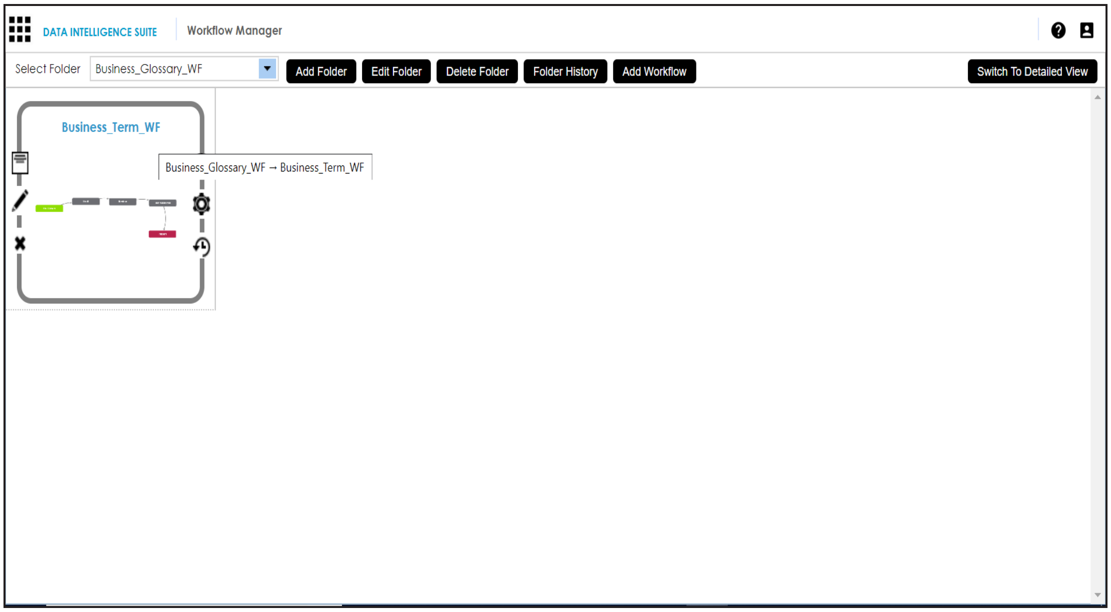
To update workflow's folder and its name, follow these steps:

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

2. Select the folder containing the desired workflow.

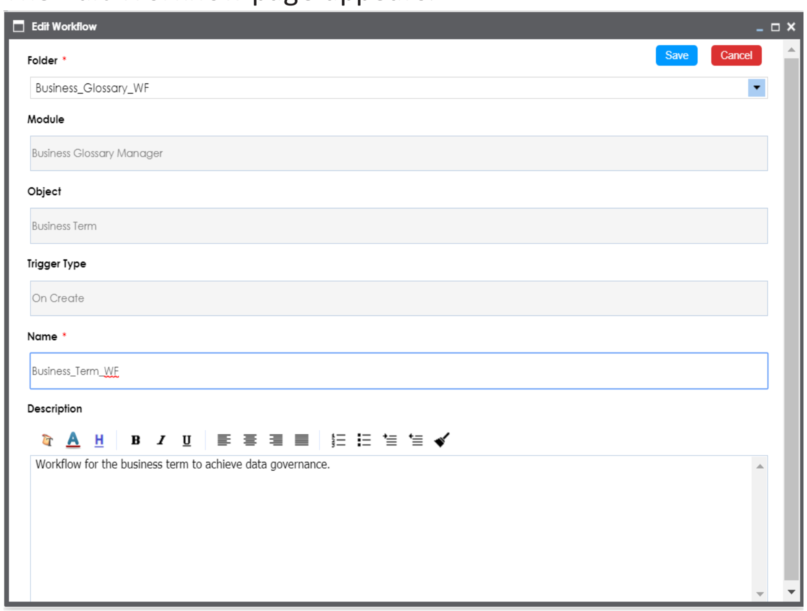
   The following page appears displaying the workflow.

3. Hover over the workflow.



4. Click .

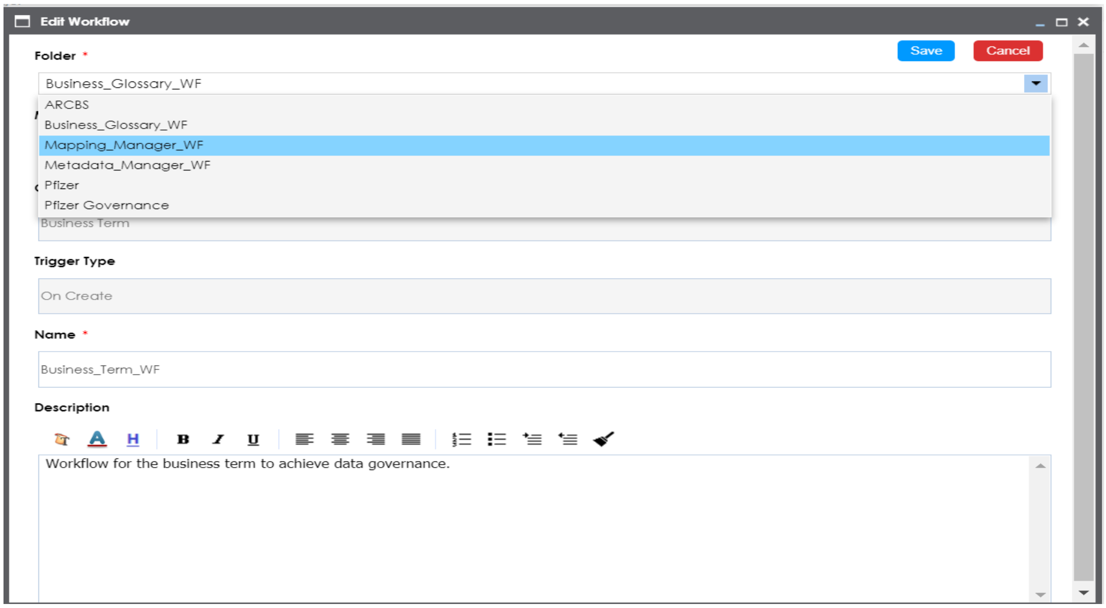
The Edit Workflow page appears.



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.

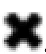
To delete workflows, follow these steps:

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 .

   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.

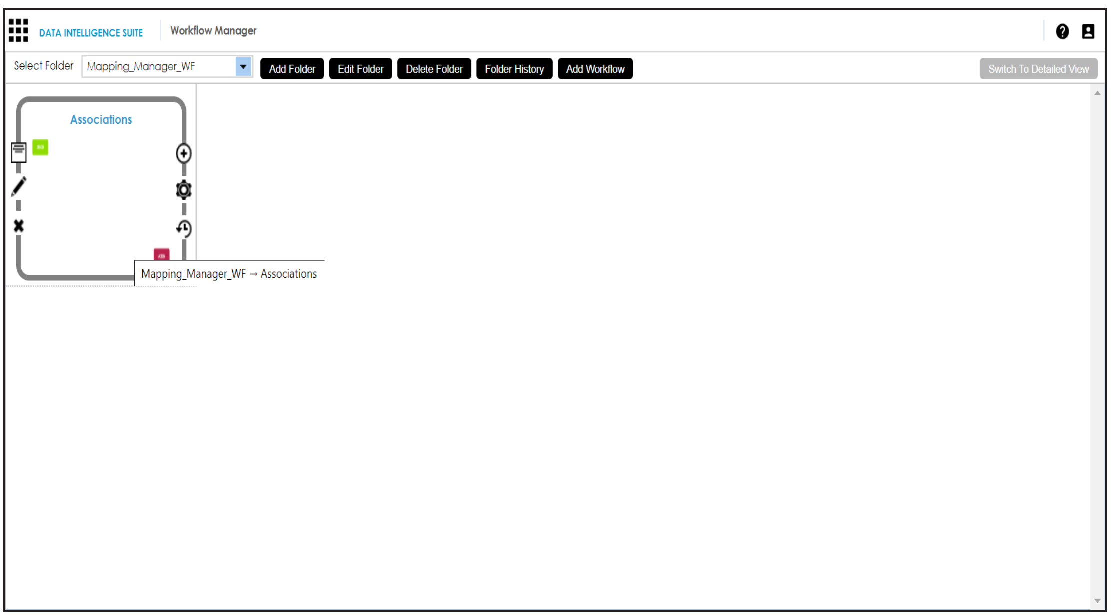
You can configure a workflow by connecting different stages in a desired sequence. You can also create different stages and assign roles to these stages.

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

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

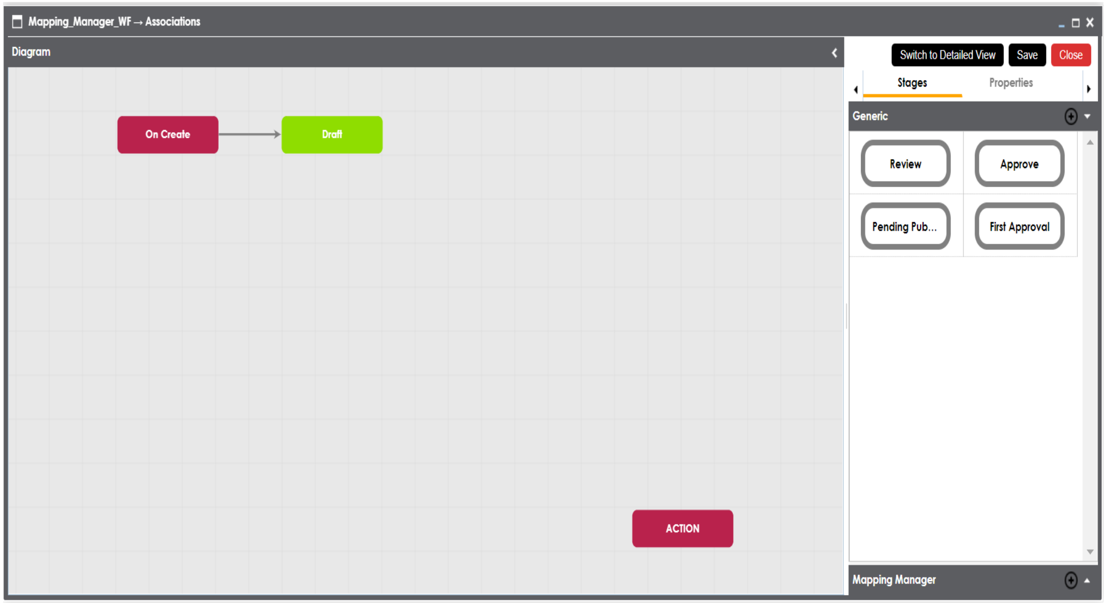
The workflow appears.

3. Hover over the workflow.



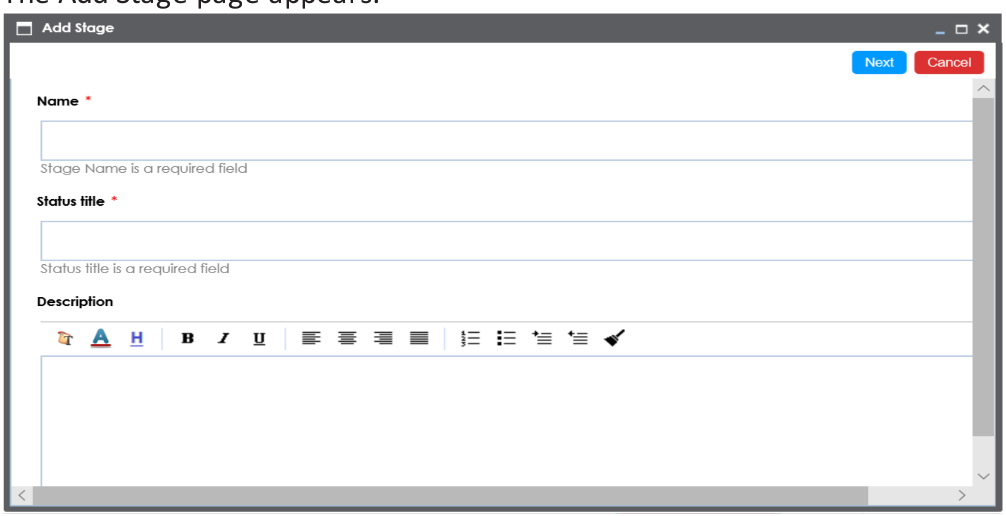
4. Click .

   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**.

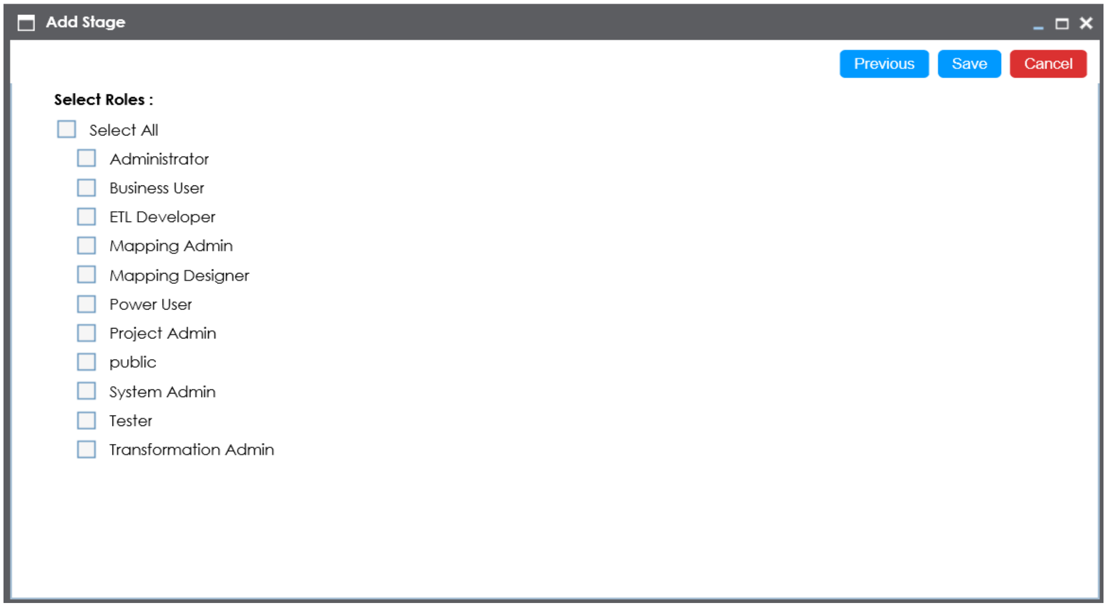
   For example:

   - Name - Review
   - Status Title - Pending Review

- Description - The stage is part of Mapping_Manager_WF.

7. Click **Save**.

   The following page appears.



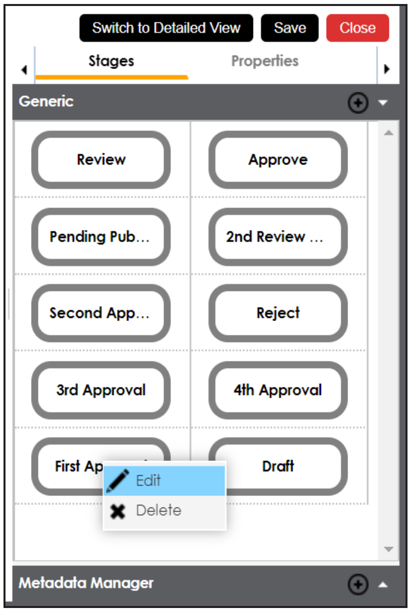
8. Select the roles by selecting the appropriate check box.
9. Click **Save**.

   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.

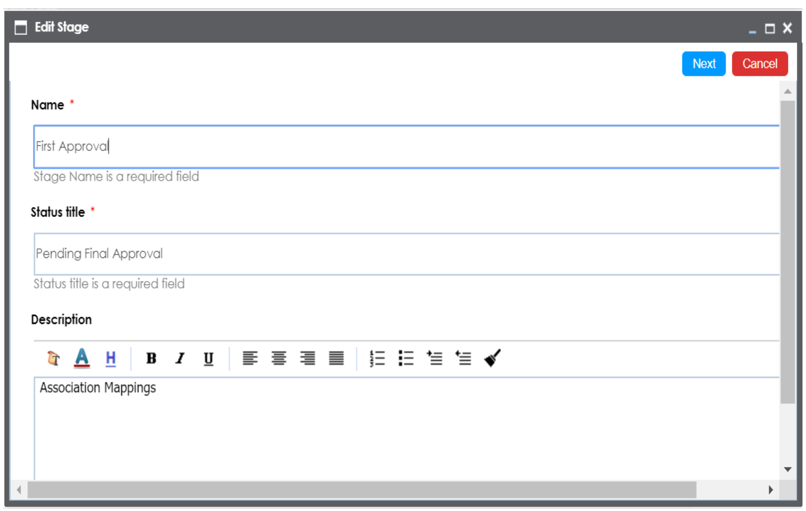
To update stages, follow these steps:

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



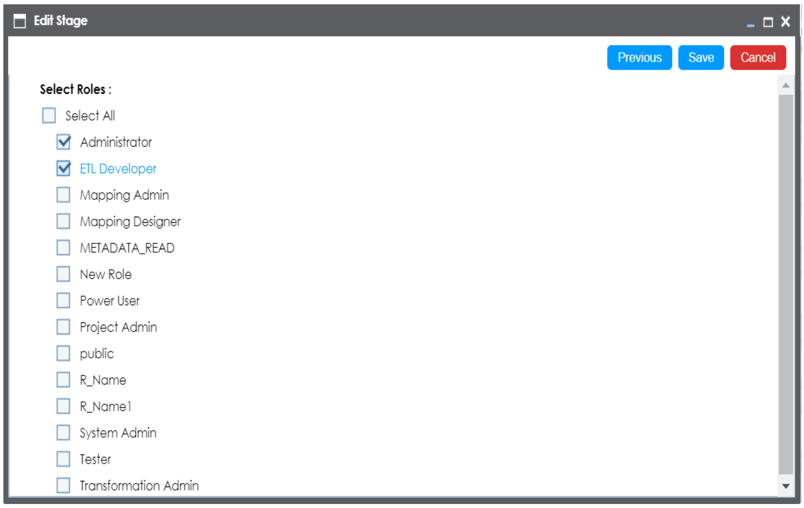
2. Click **Edit**.

   You can update the stage name and its description.



3. Click **Next**.

   You can update the roles assigned to the stage.

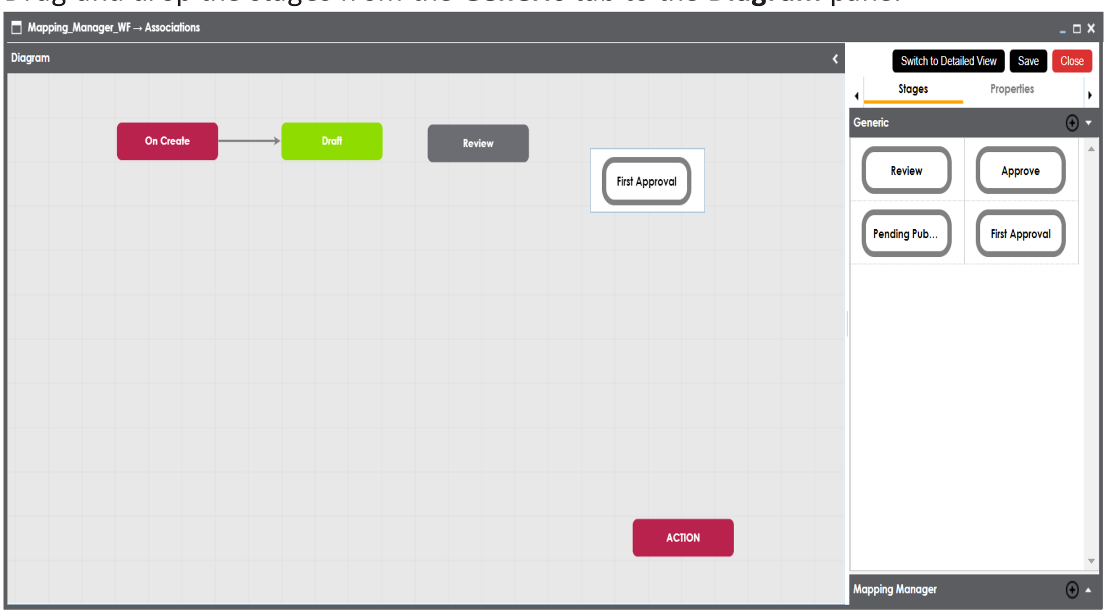


4. Click **Save**.

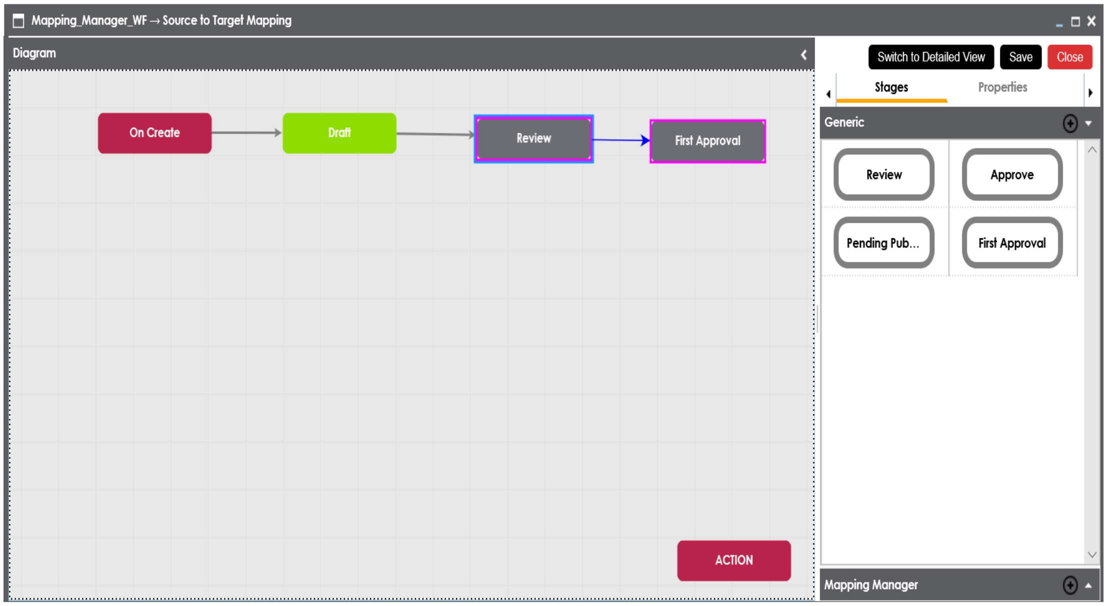
The stage is updated.

To add generic stages to workflows, follow these steps:

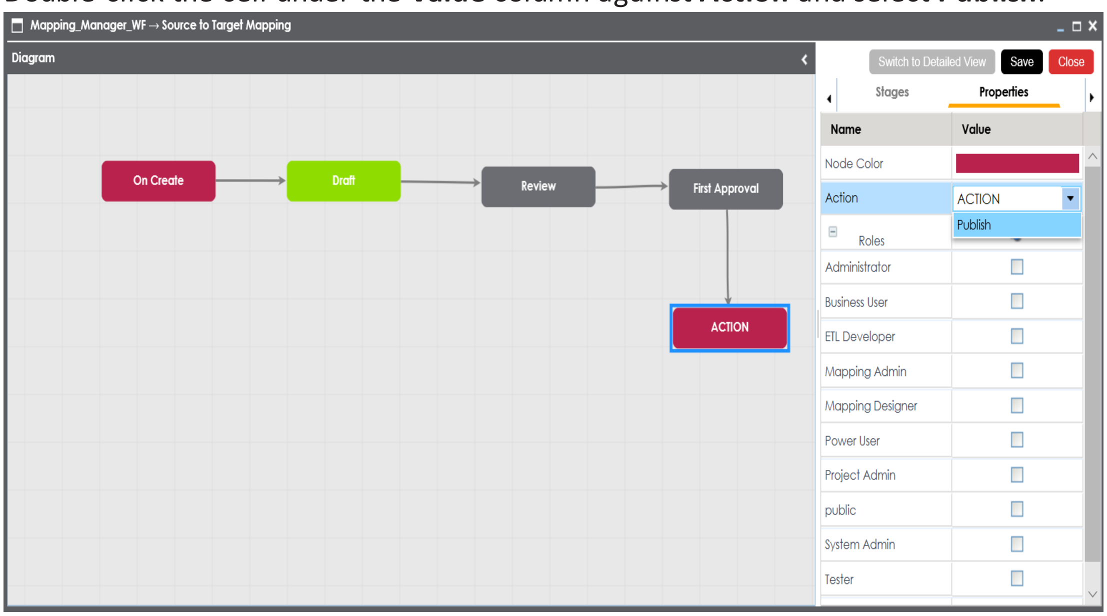
1. Drag and drop the stages from the **Generic** tab to the **Diagram** pane.



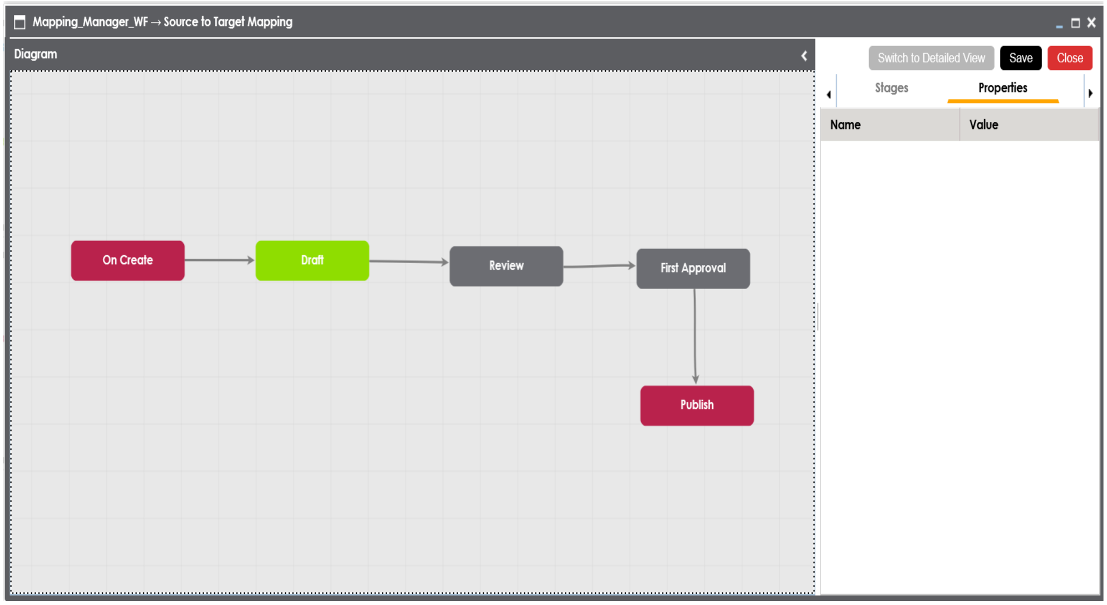
2. Drag the cursor from one stage to the next stage to connect the two stages.



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



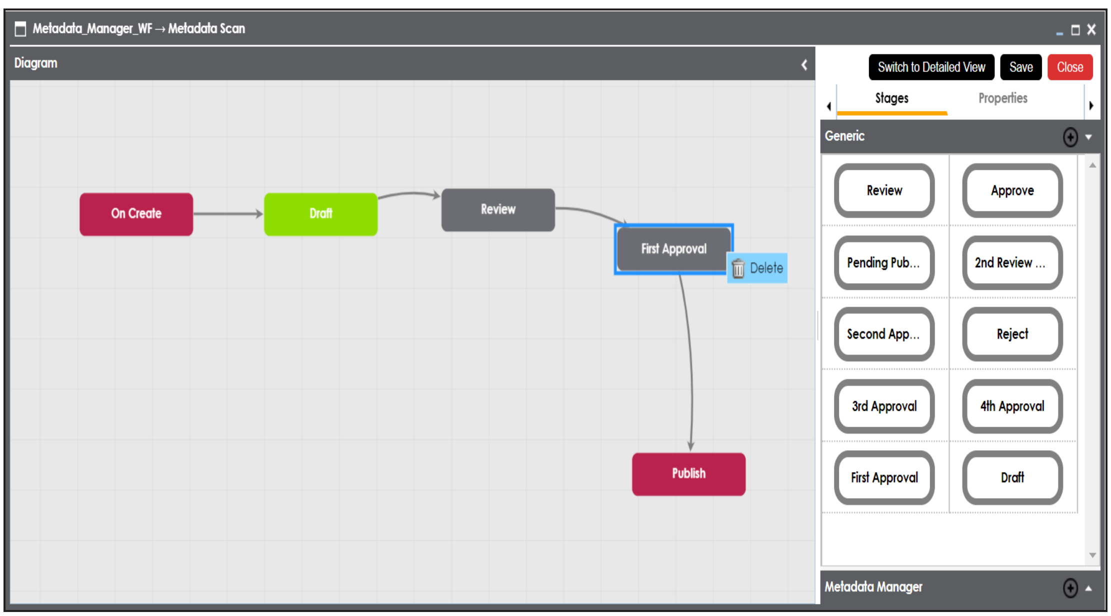
5. Select appropriate roles by selecting the appropriate check boxes.
6. Click **Save**.



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:

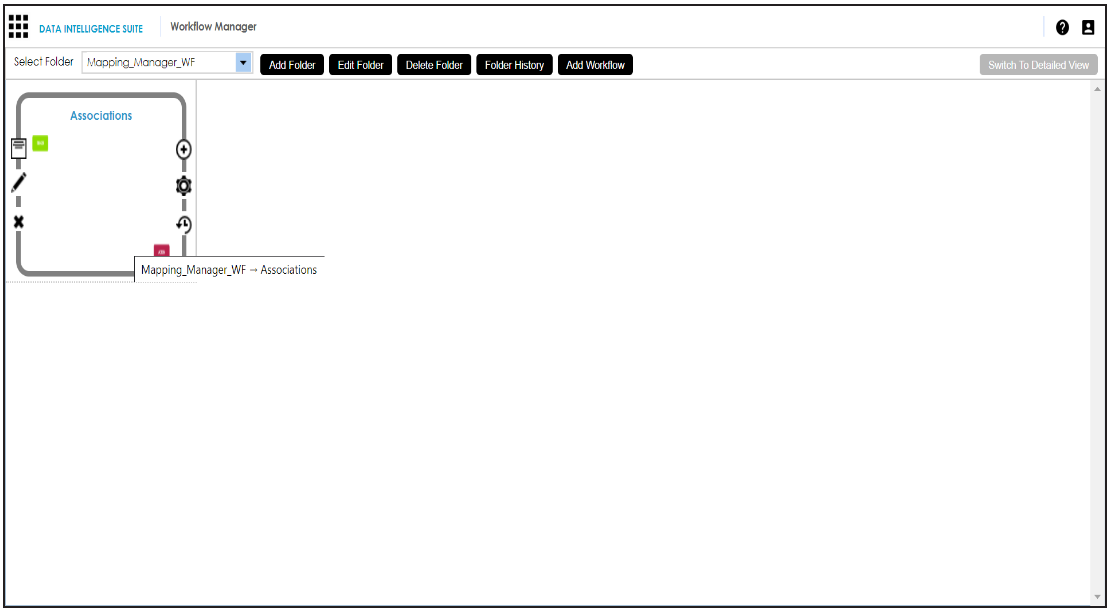
- Ensure that you specified the module as **Mapping Manager** and the object as **Mapping** while adding the workflow to the folder.
- The default workflow (Mapping_Manager_Default_Workflow) is assigned to all the mappings in the Mapping Manager. You can re-assign your own workflow and override the default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

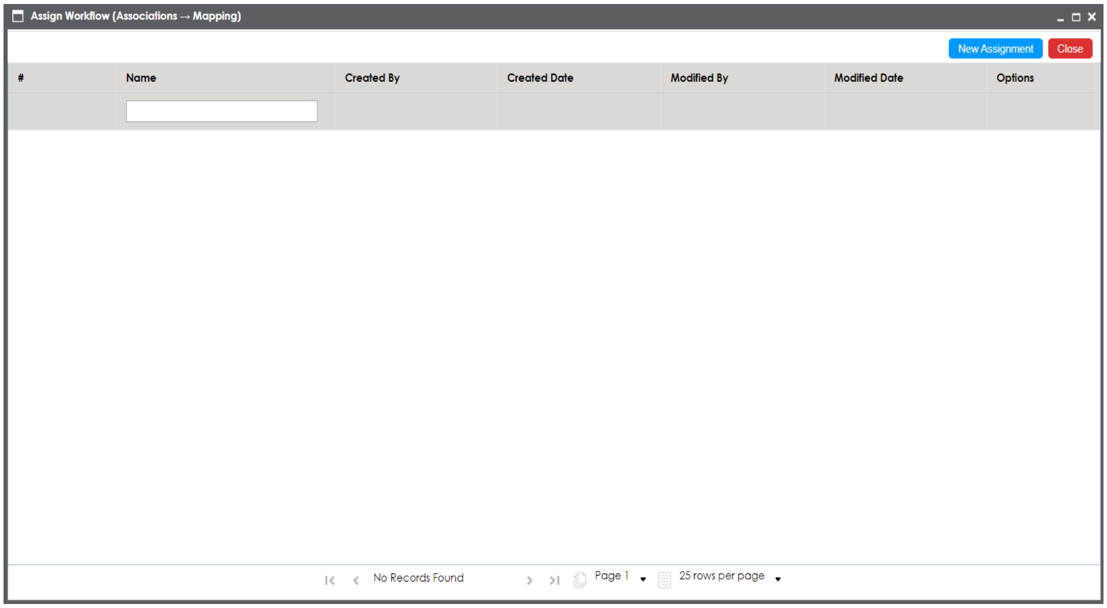
The workflows in the folder appear.

3. Hover over the desired workflow.



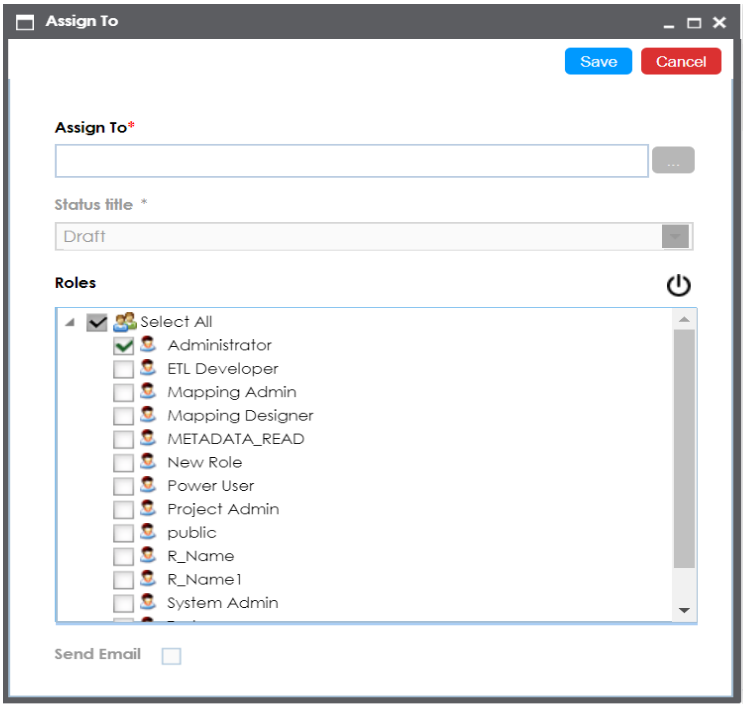
4. Click ⊕.

   The Assign Workflow page appears.



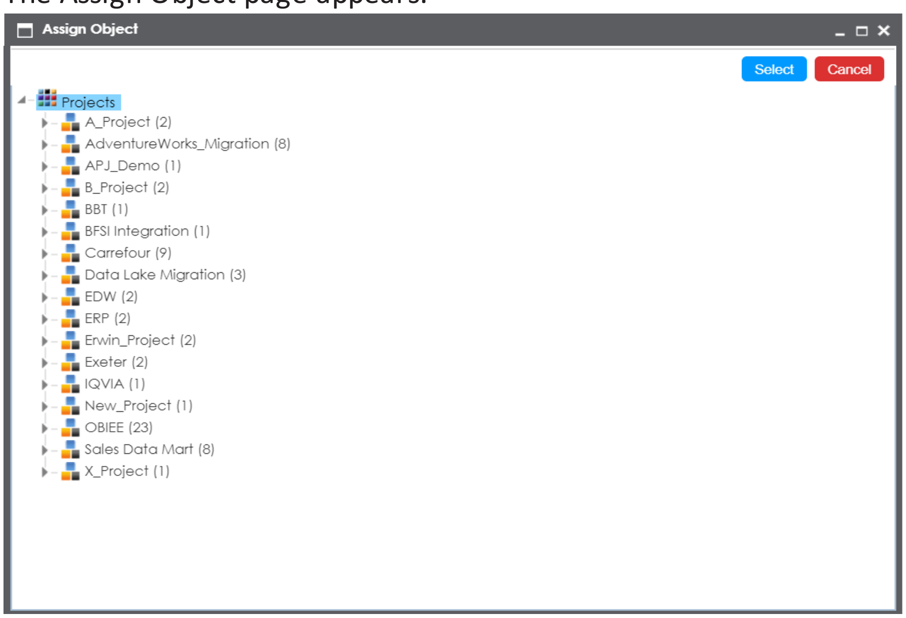
5. Click **New Assignment**.

   The Assign To page appears.



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

The Assign Object page appears.



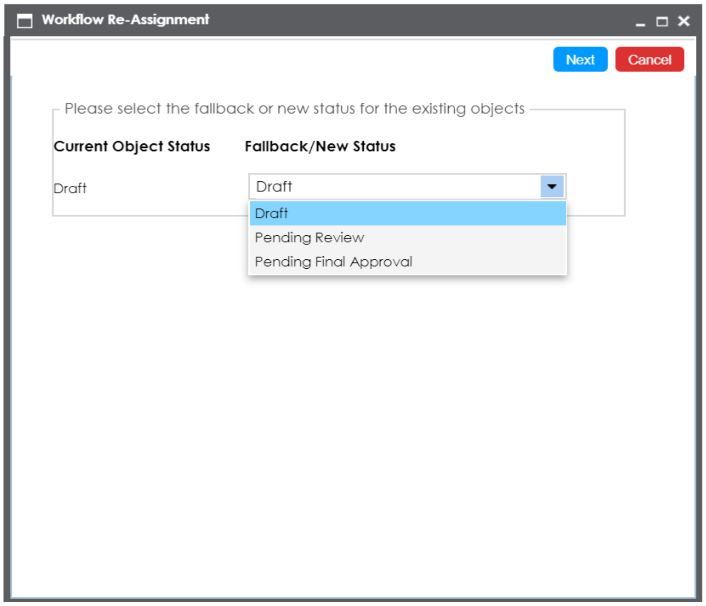
7. Select the desired project and click **Select**.

   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.

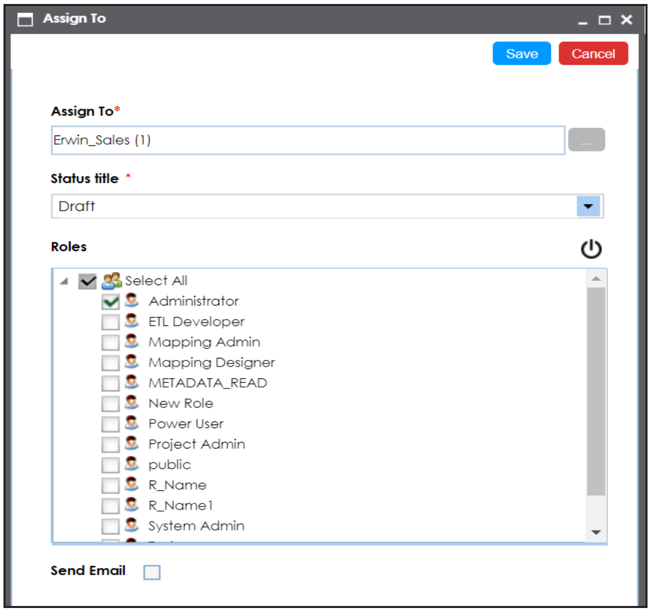


9. Select the appropriate **Fallback/New Status**.

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.

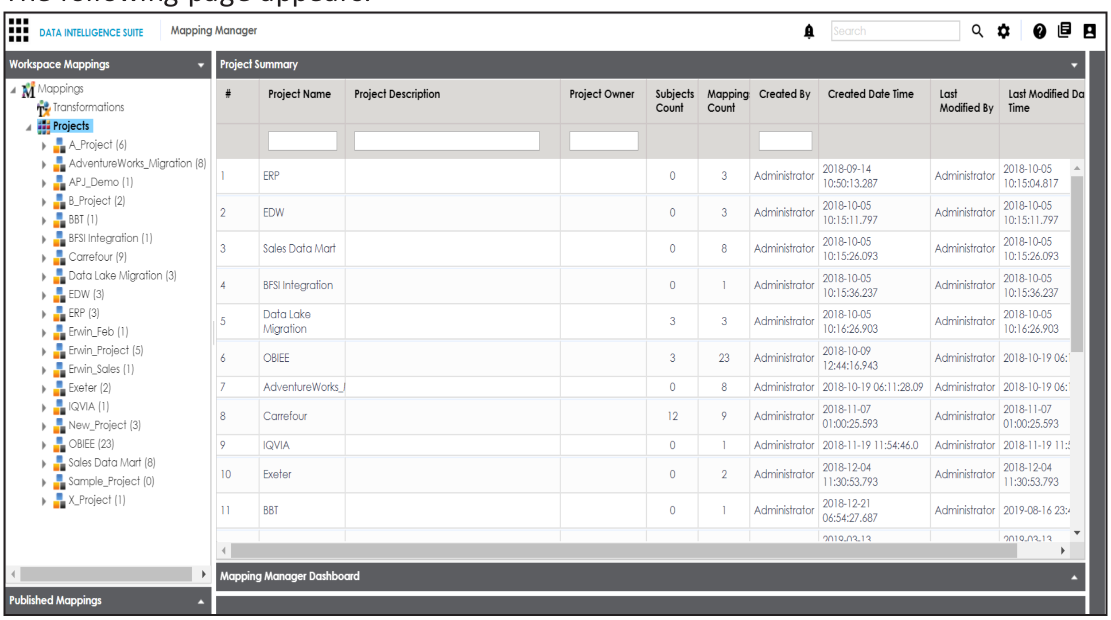
Executing workflows involves:

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:

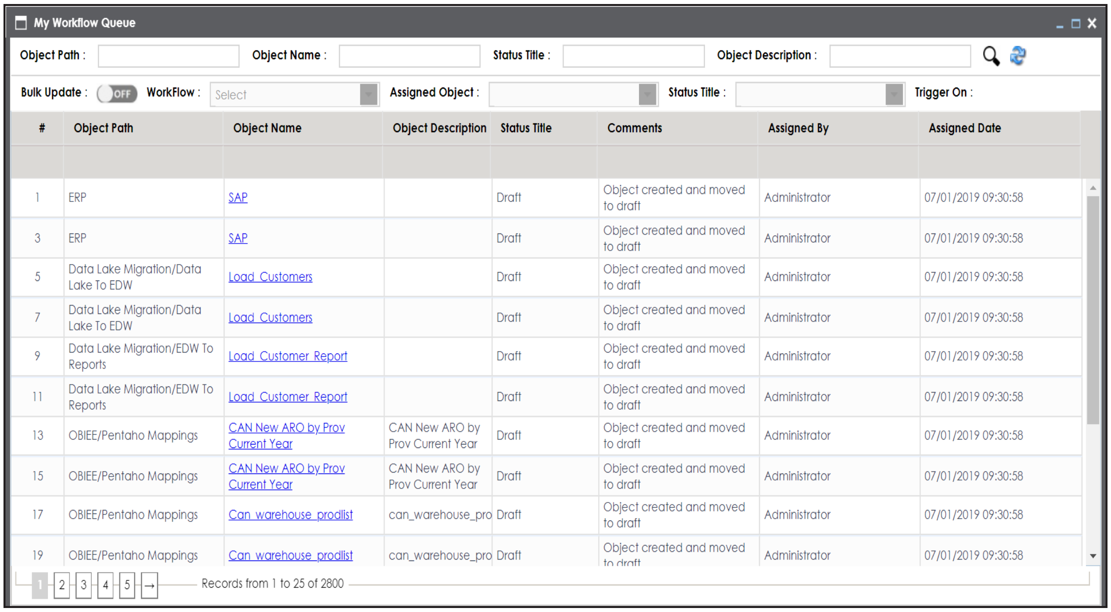
1. Go to **Application Menu** > **Data Catalog** > **Mapping Manager**.

   The following page appears.

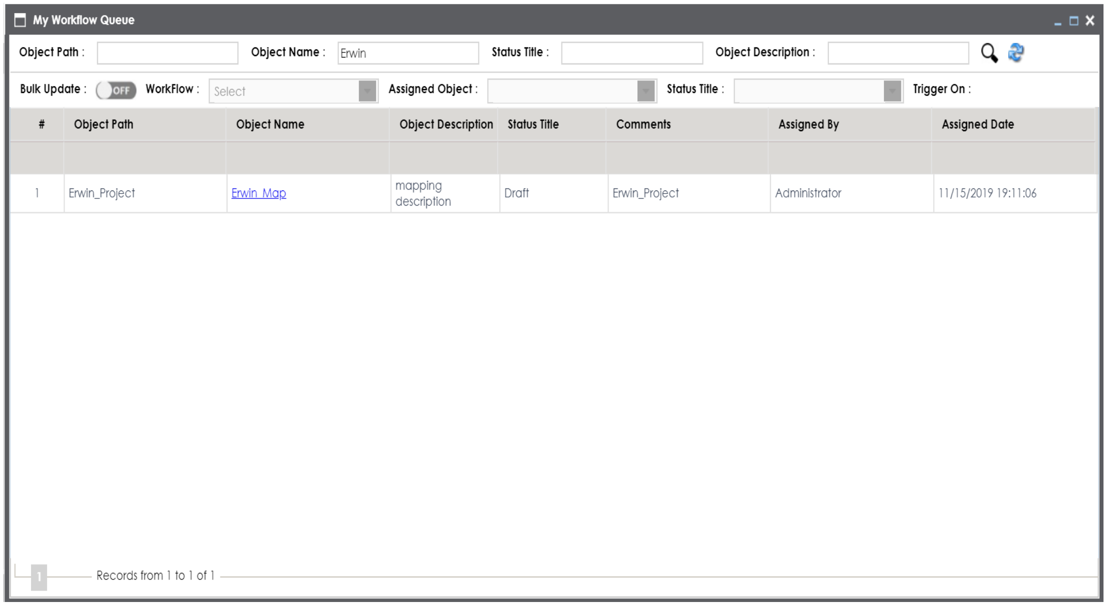
2. Click .
3. Click **My Workflow Queue**.

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



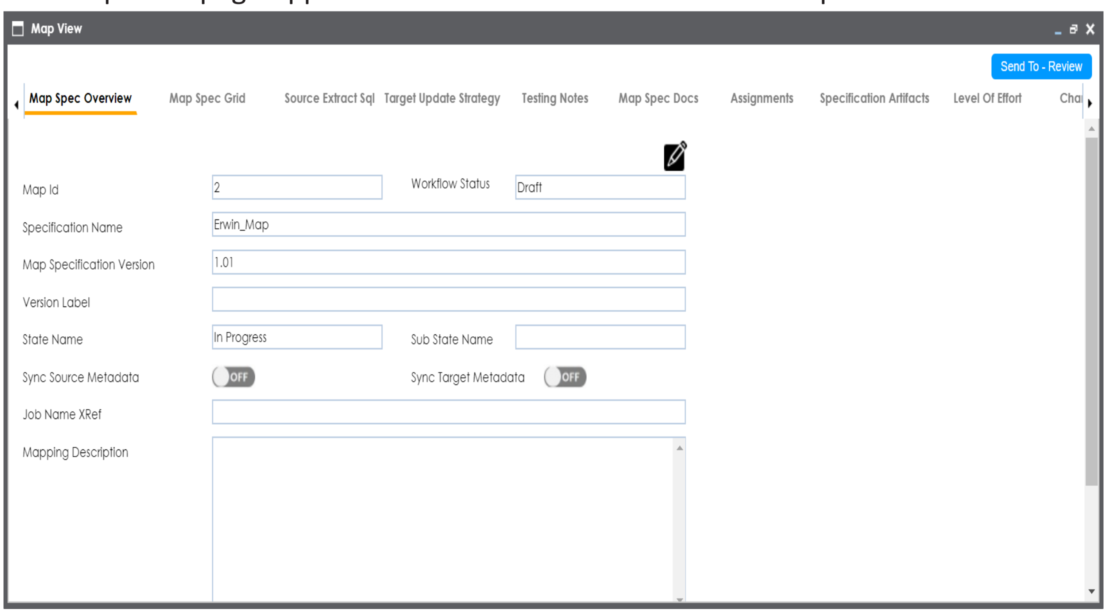
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search results appear.



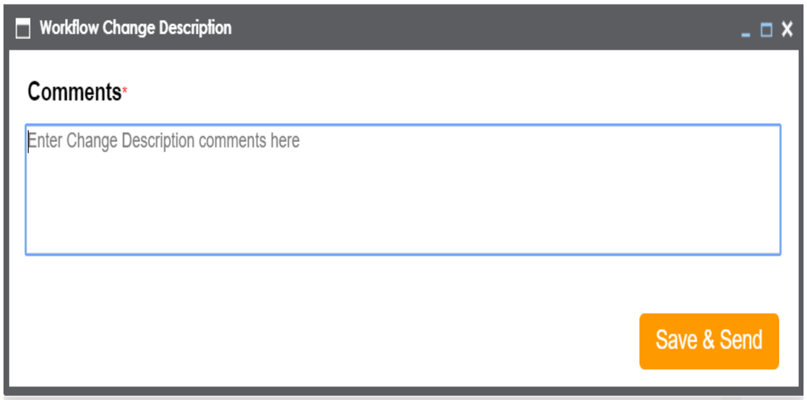
5. Click the <Object_Name> appearing as a hyperlink.

   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.



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.

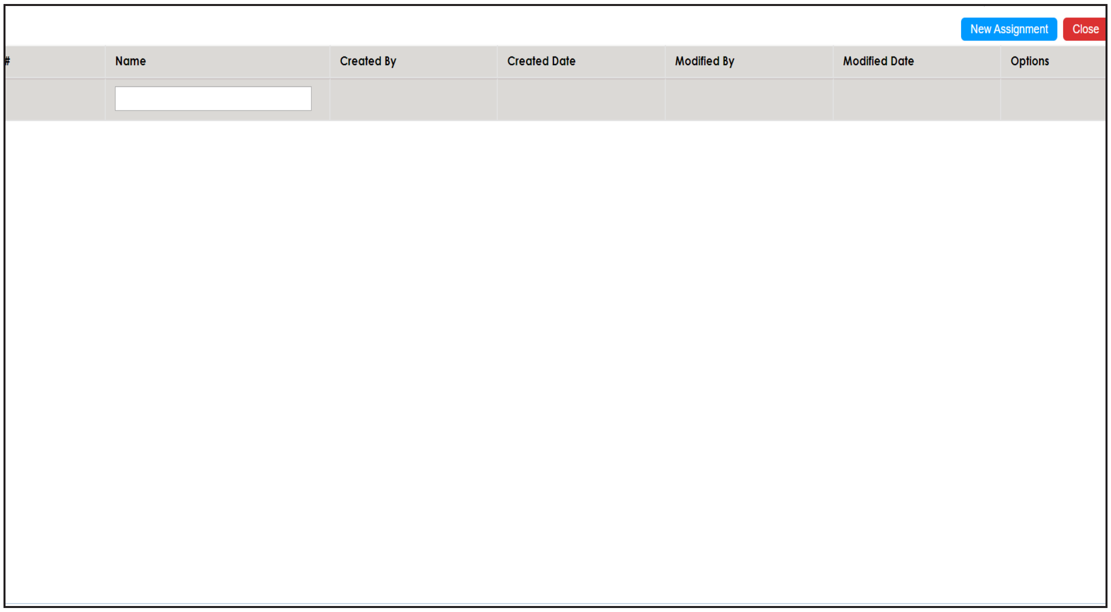
To assign workflows to environments in the Metadata Manager, follow these steps:

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

All the workflows in the folder appear.

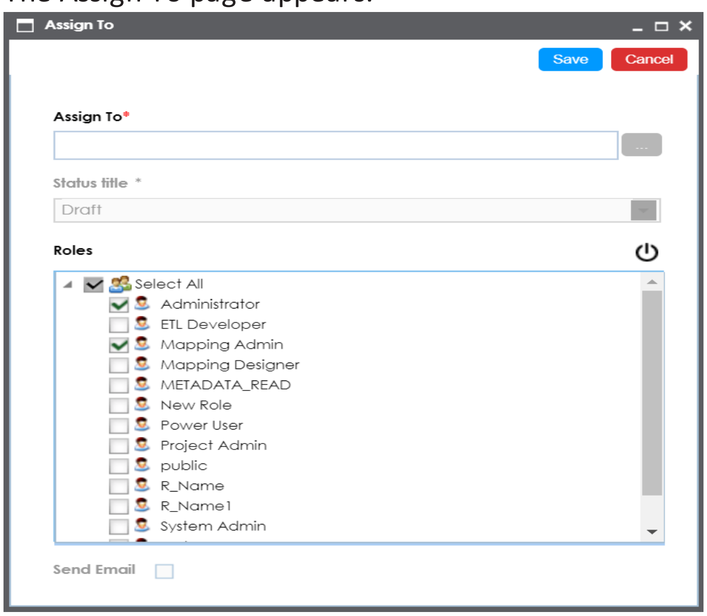
3. Hover over the desired workflow.
4. Click ⊕.

The following page appears.



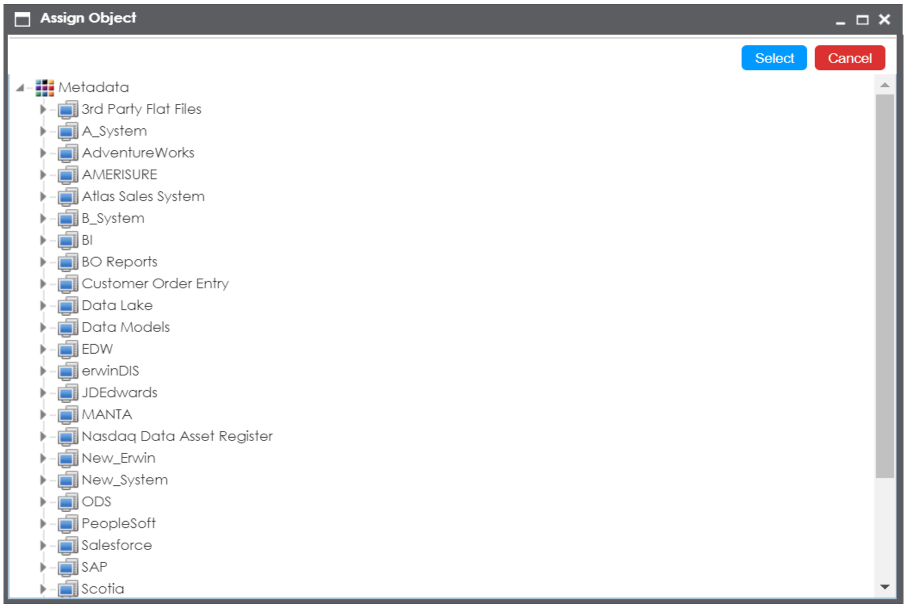
5. Click **New Assignment**.

   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.

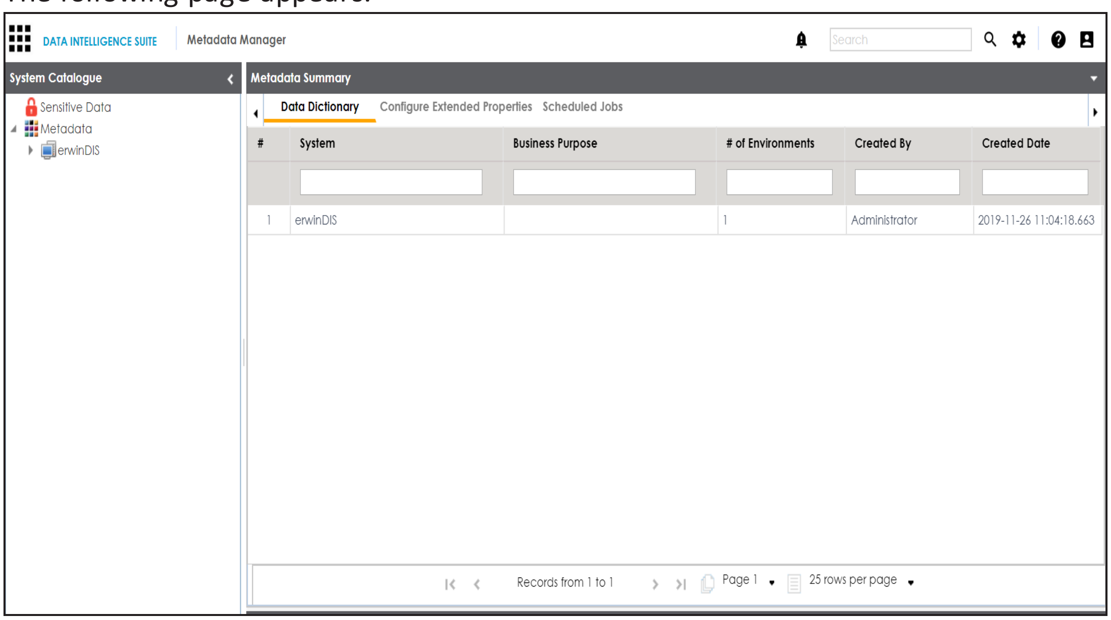
Executing workflows involves:

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:

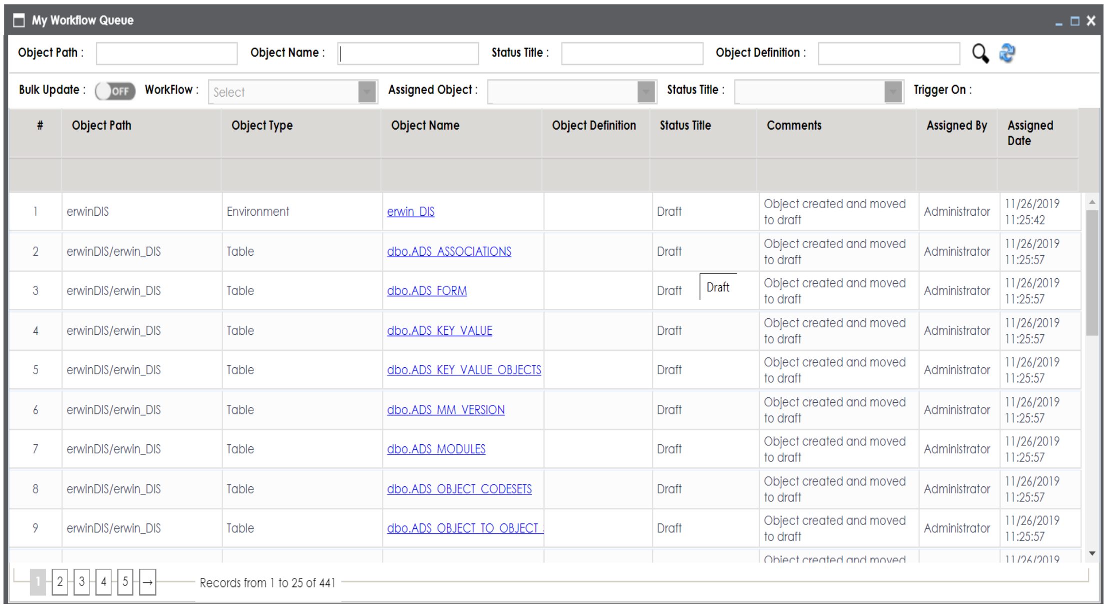
1. Go to **Application Menu** > **Data Catalog** > **Metadata Manager**.

   The following page appears.

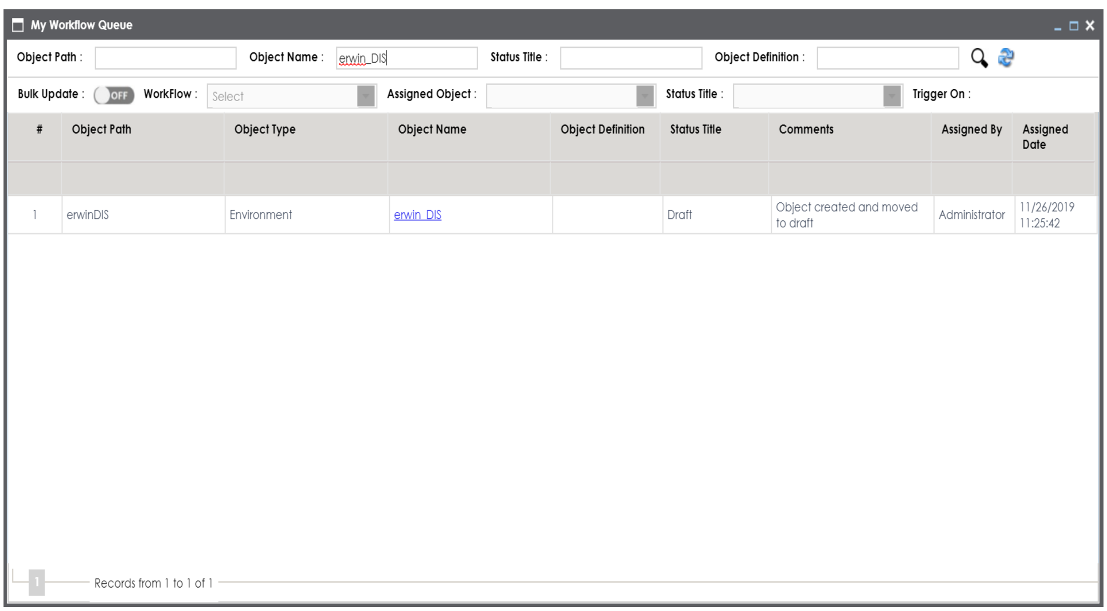
2. Click .
3. Click **My Workflow Queue**.

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



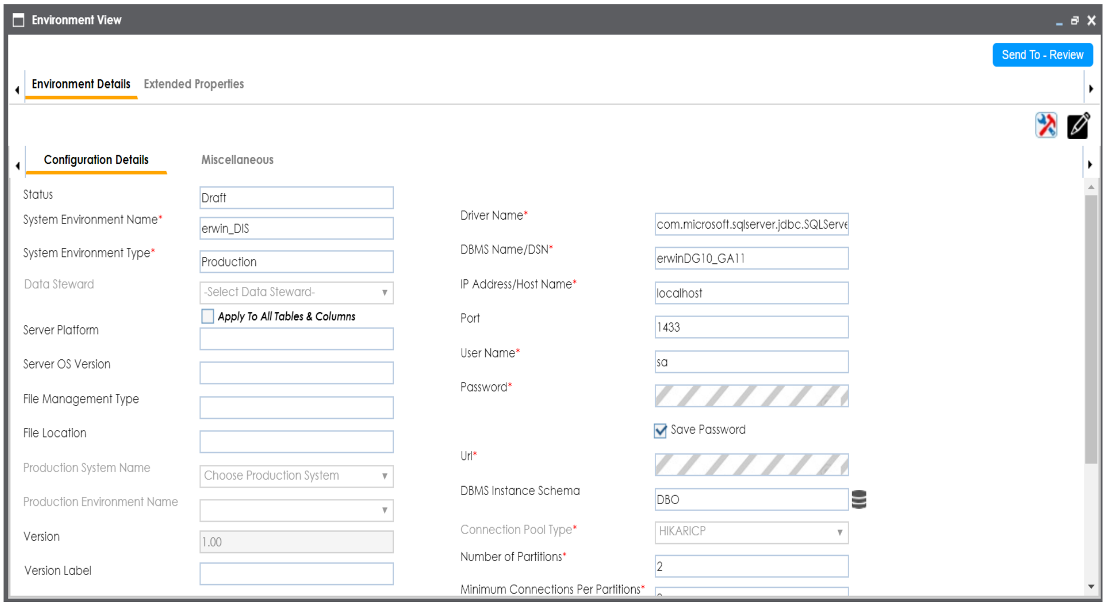
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search results are displayed.



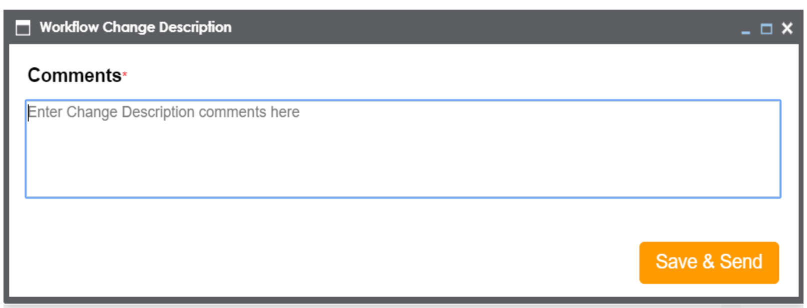
5. Click the desired <Object Name> which appears as hyperlink.

   The Environment View page appears.



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

   The Workflow Change Description page appears.



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.

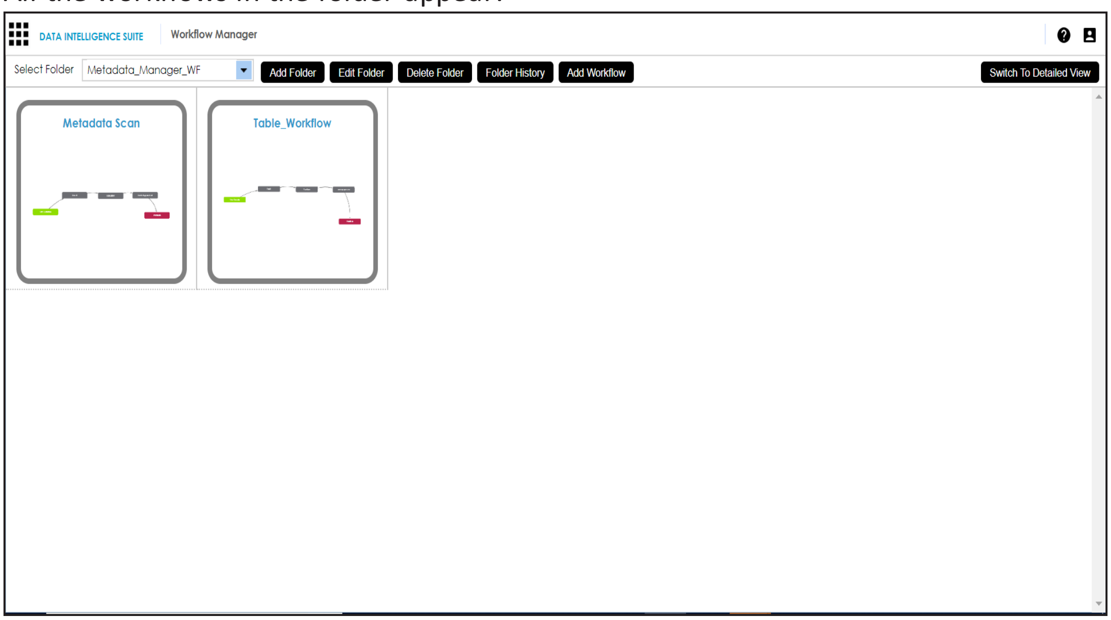
You should take a note of the following things:

- 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:

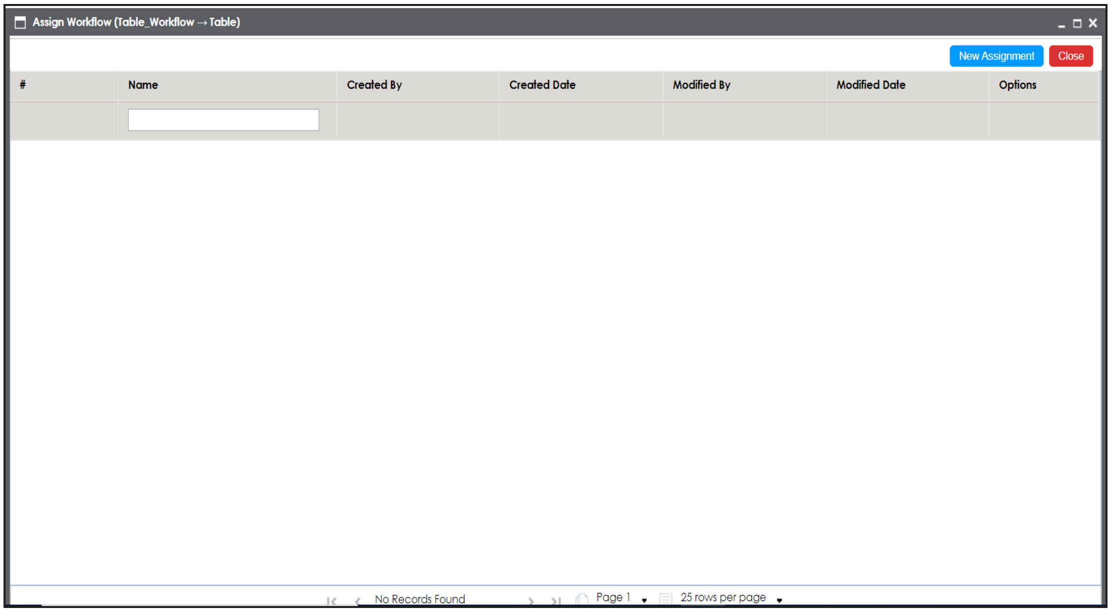
1. Go to **Application Menu** > **Miscellaneous** > **Workflow Manager**.
2. Select the desired folder.

All the workflows in the folder appear.



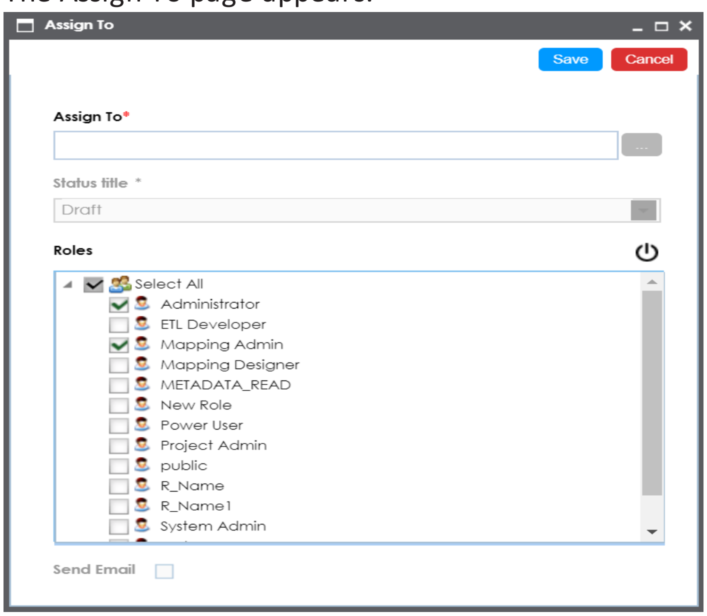
3. Hover over the desired workflow.
4. Click .

   The following page appears.



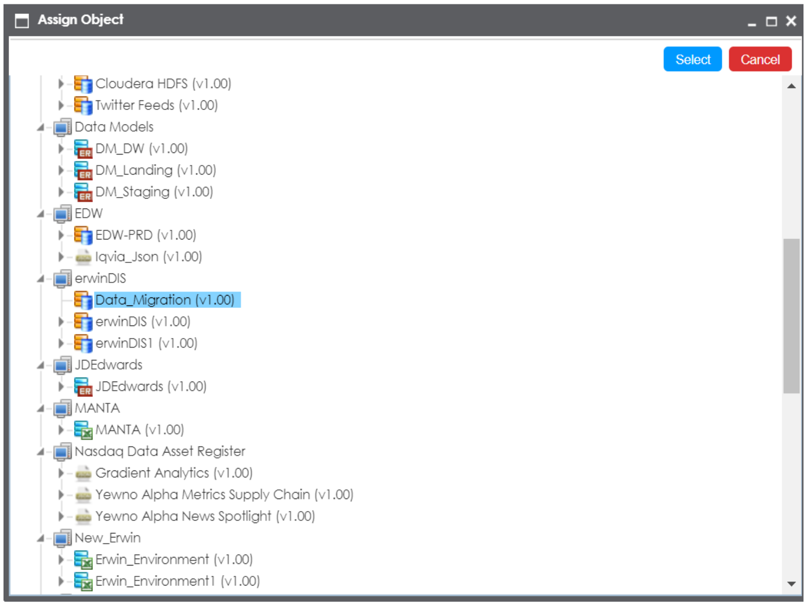
5. Click **New Assignment**.

   The Assign To page appears.



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

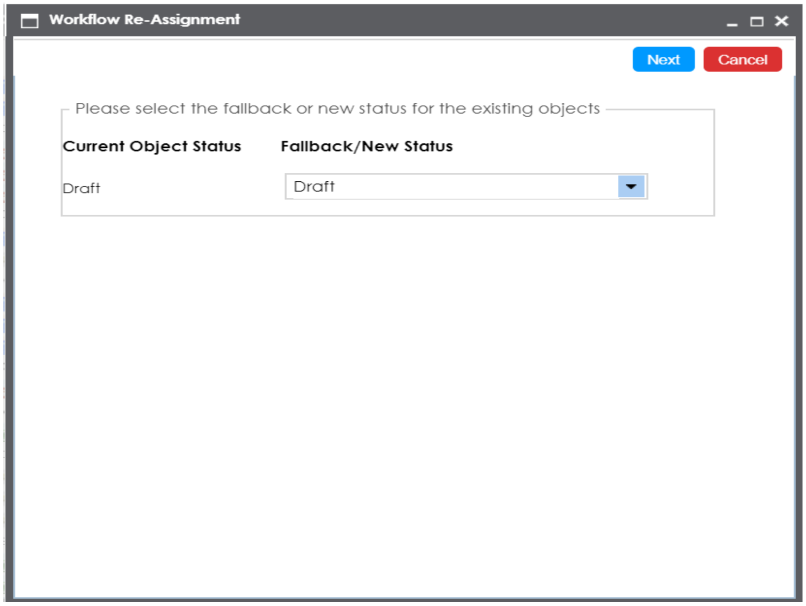
   The Assign Object page appears.



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.

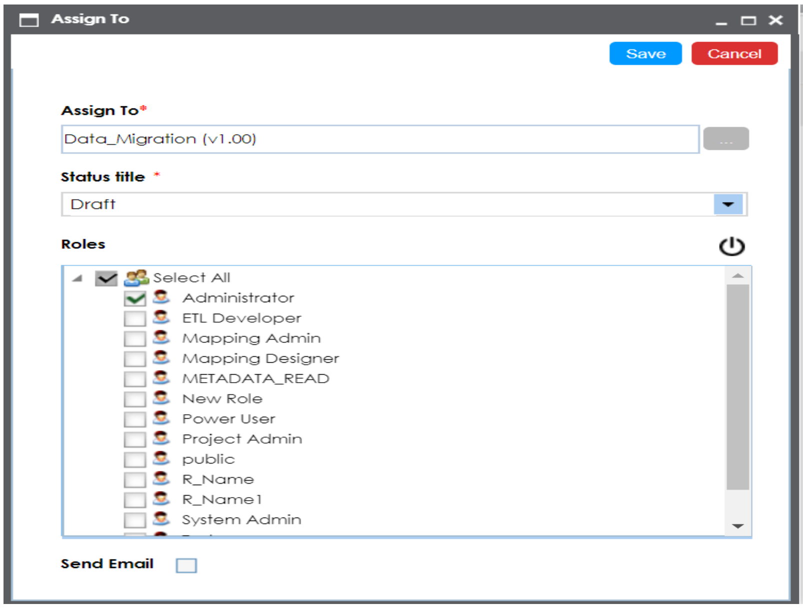
    The options for Fallback/New Status depends on the stages defined in the workflow.

11. Click **Next**.

    The Comments page appears.

12. Enter relevant comments, and click .

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



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.

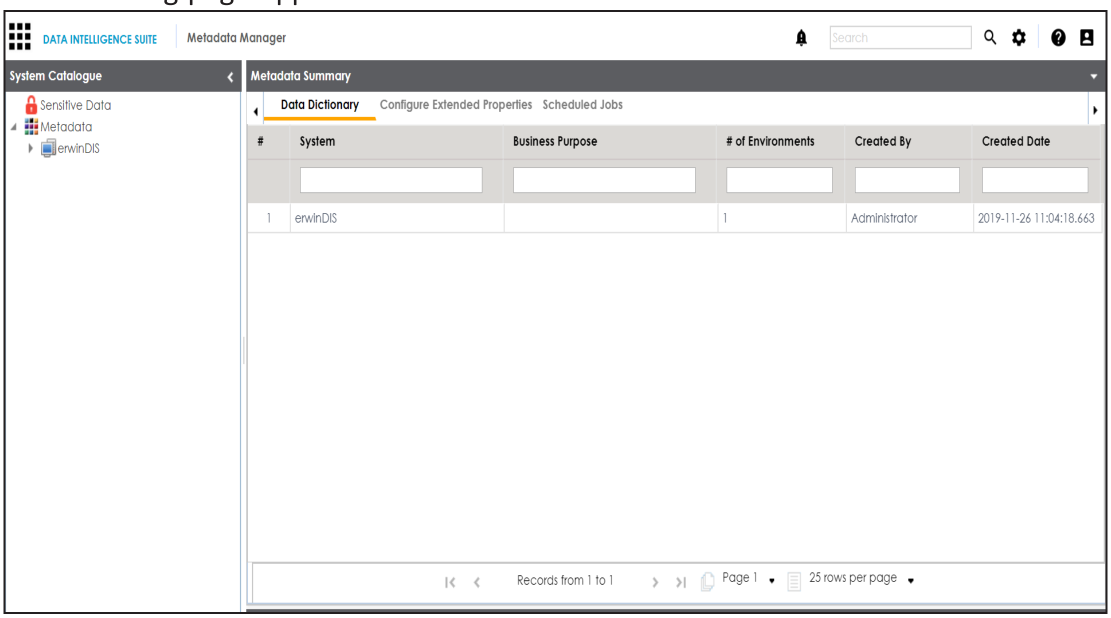
Executing workflows involves:

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:

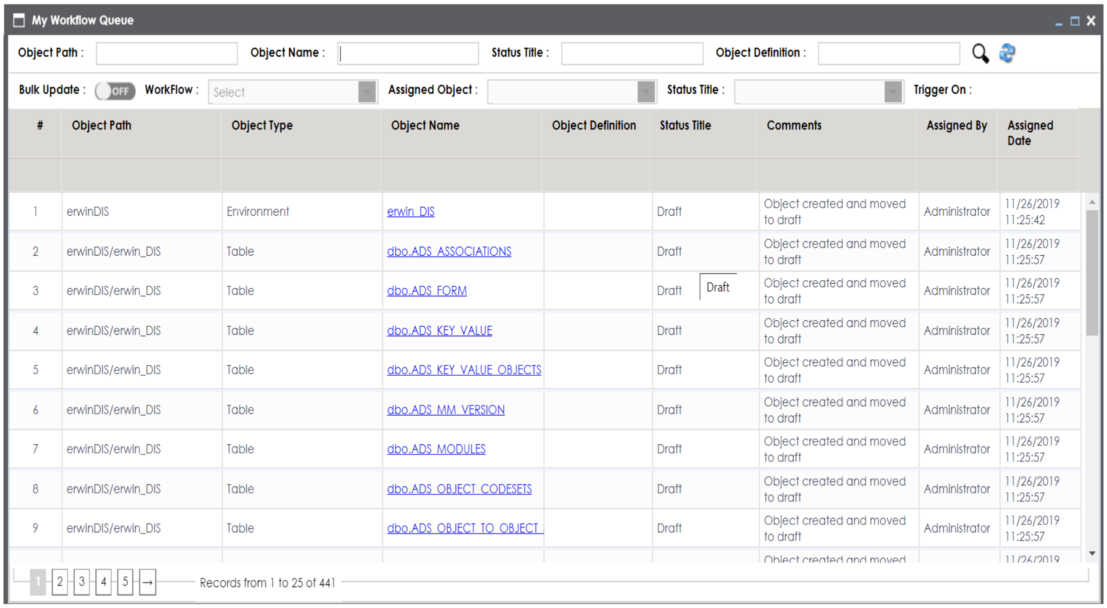
1. Go to **Application Menu** > **Data Catalog** > **Metadata Manager**.

   The following page appears.

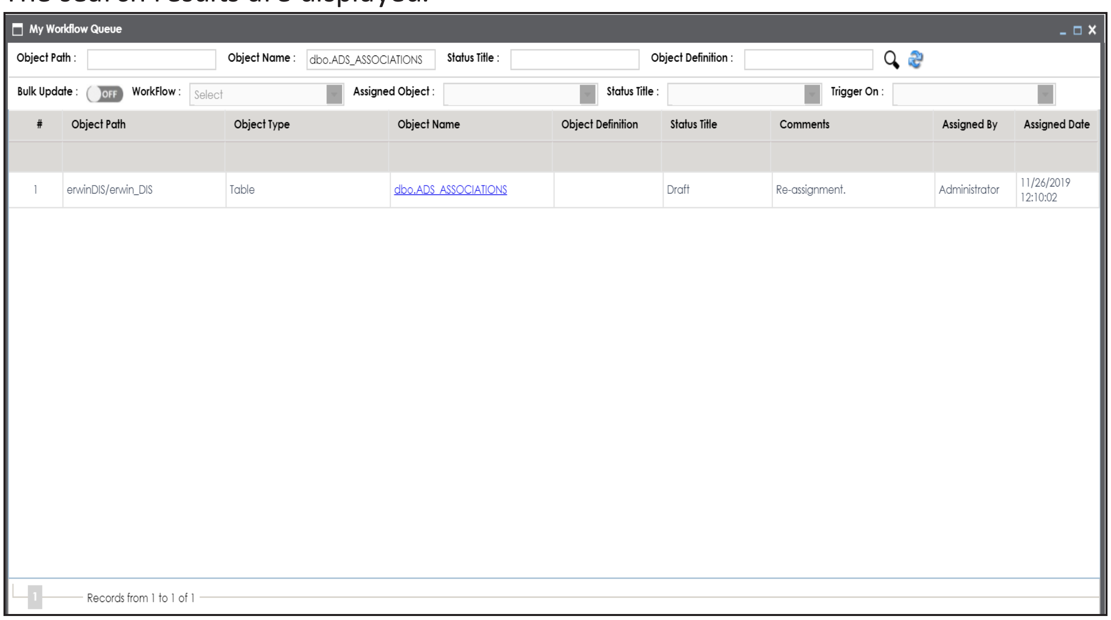
2. Click .
3. Click **My Workflow Queue**.

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



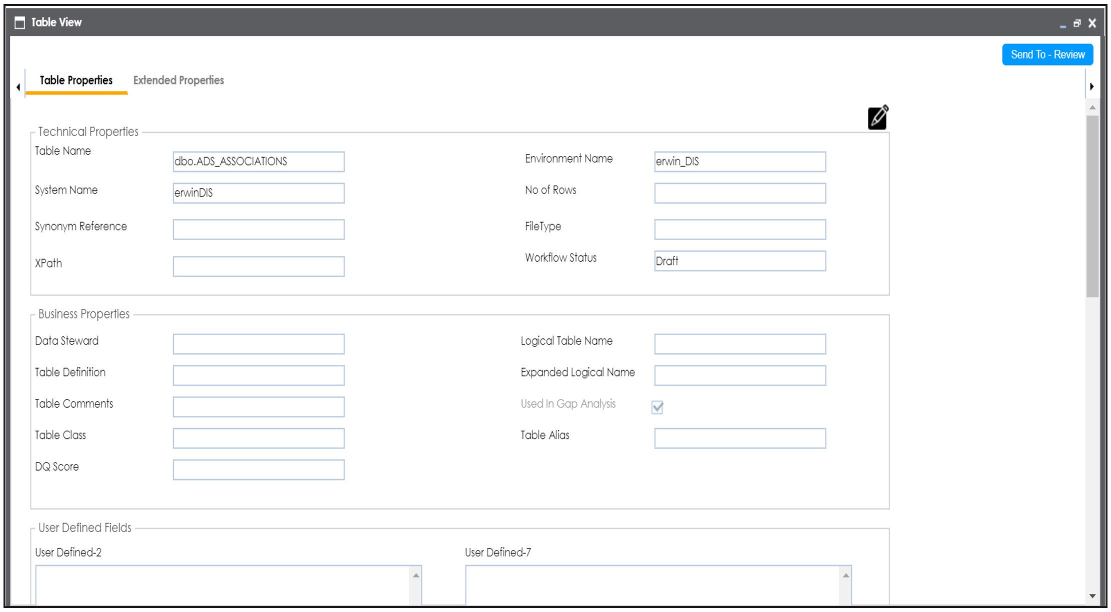
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search results are displayed.



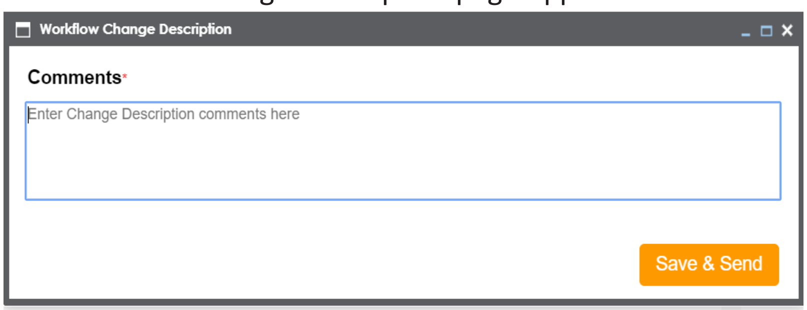
5. Click the desired <Object Name> which appears as hyperlink.

The Table View page appears.



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

   The Workflow Change Description page appears.



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.

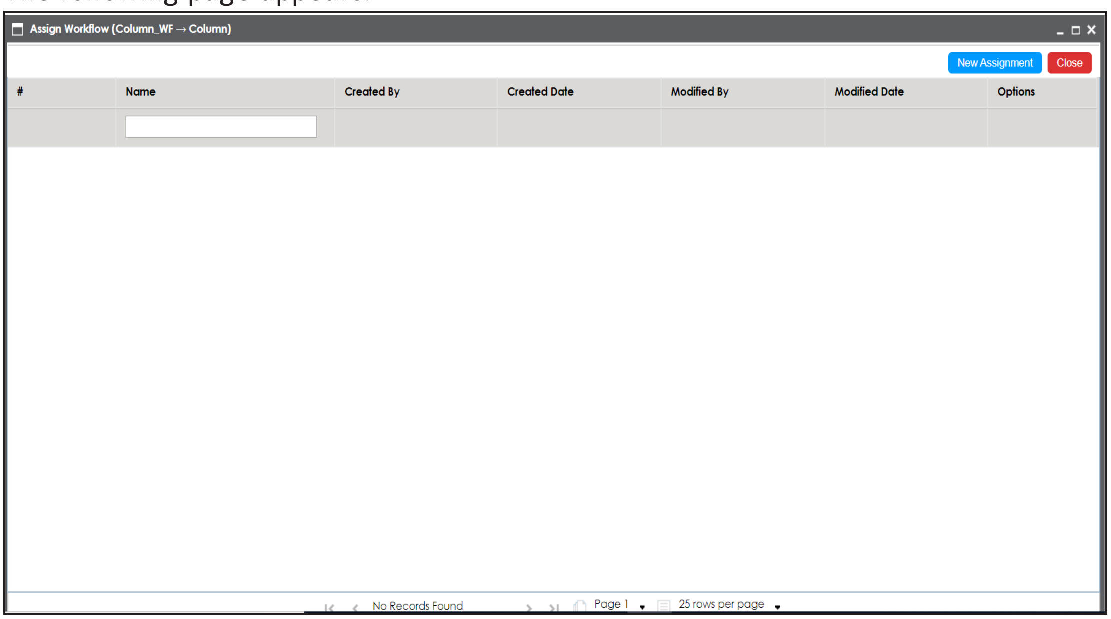
To re-assign workflows to columns in the Metadata Manager, follow these steps:

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

All the workflows in the folder appear.

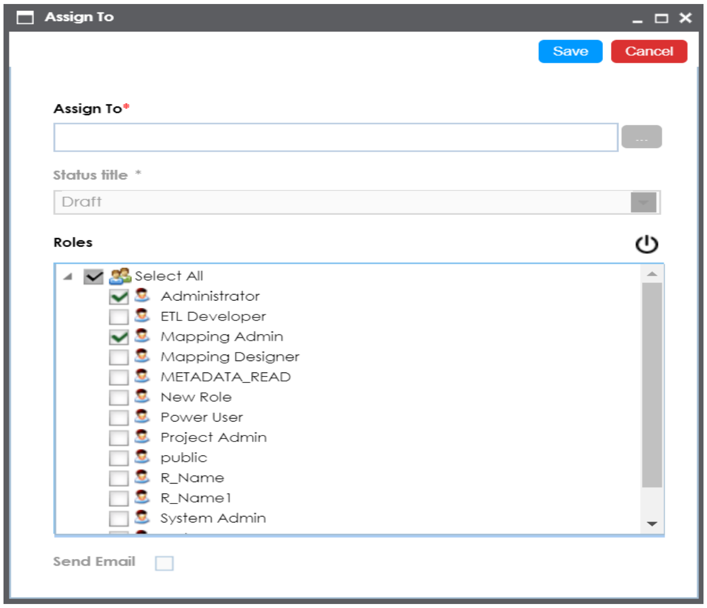
3. Hover over the desired workflow.
4. Click .

The following page appears.



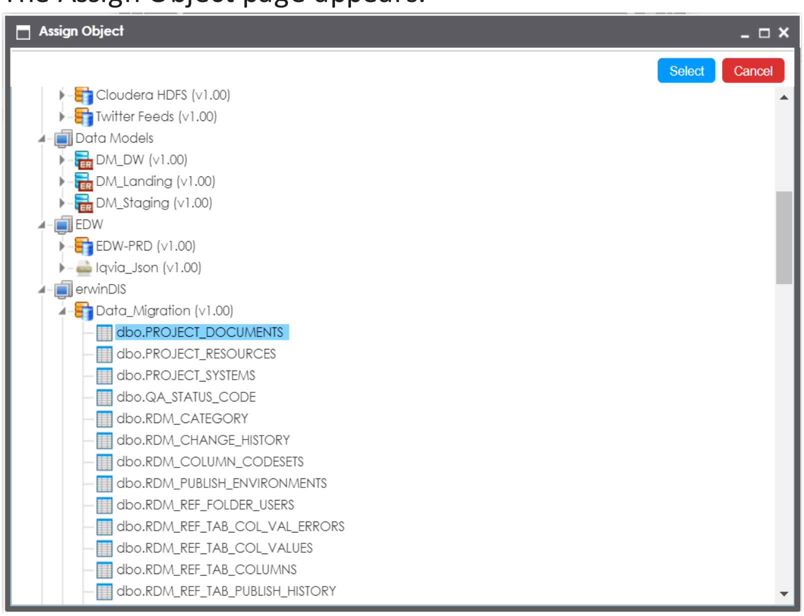
5. Click **New Assignment**.

   The Assign To page appears.



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

   The Assign Object page appears.

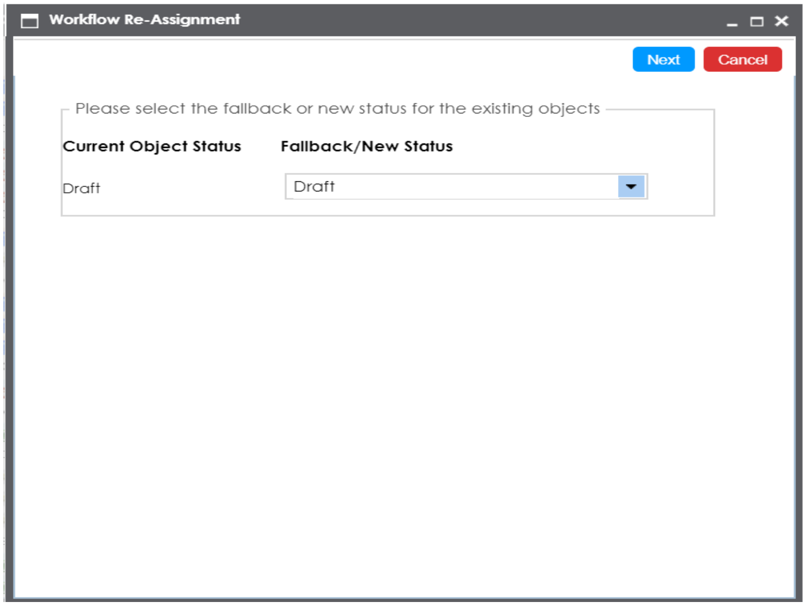


7. Click the table containing the desired column and click **Select**.

   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.



9. Select the appropriate Fallback/New Status.

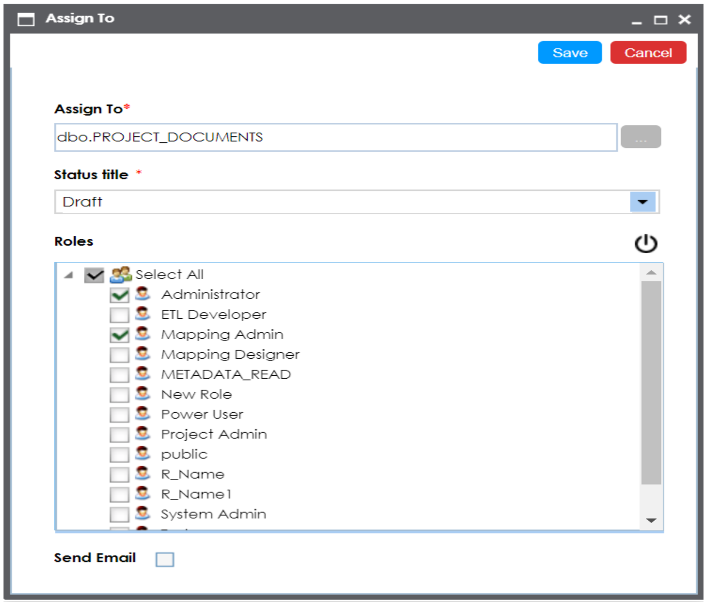
   The options for Fallback/New Status depends on the stages defined in the workflow.

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.

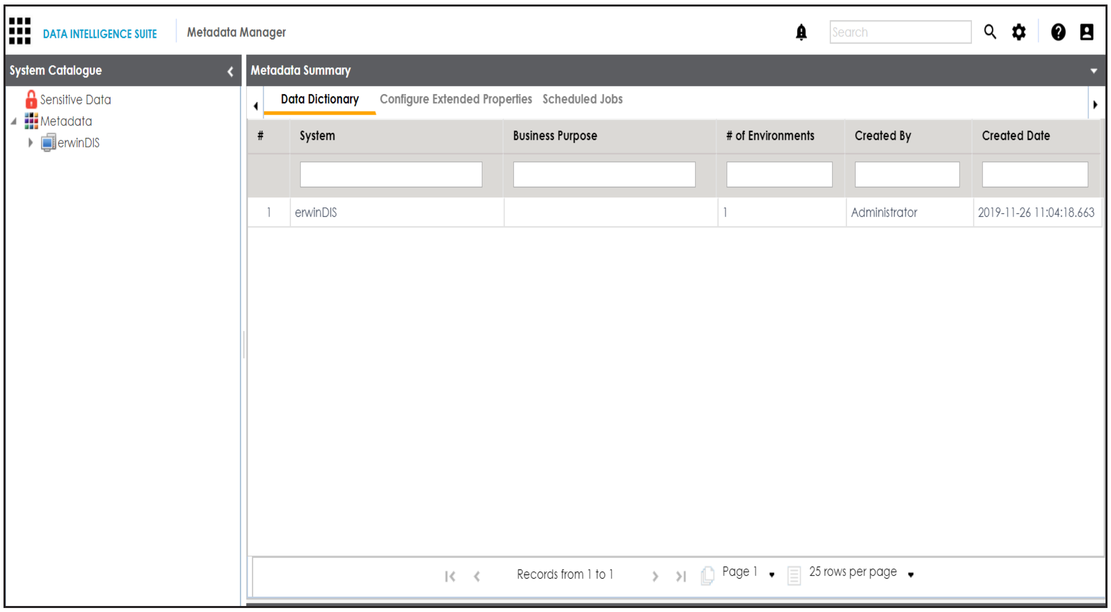
Executing workflows involves:

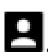
1. Receiving workflow queue notifications
2. Examining and moving the column to the next stage

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

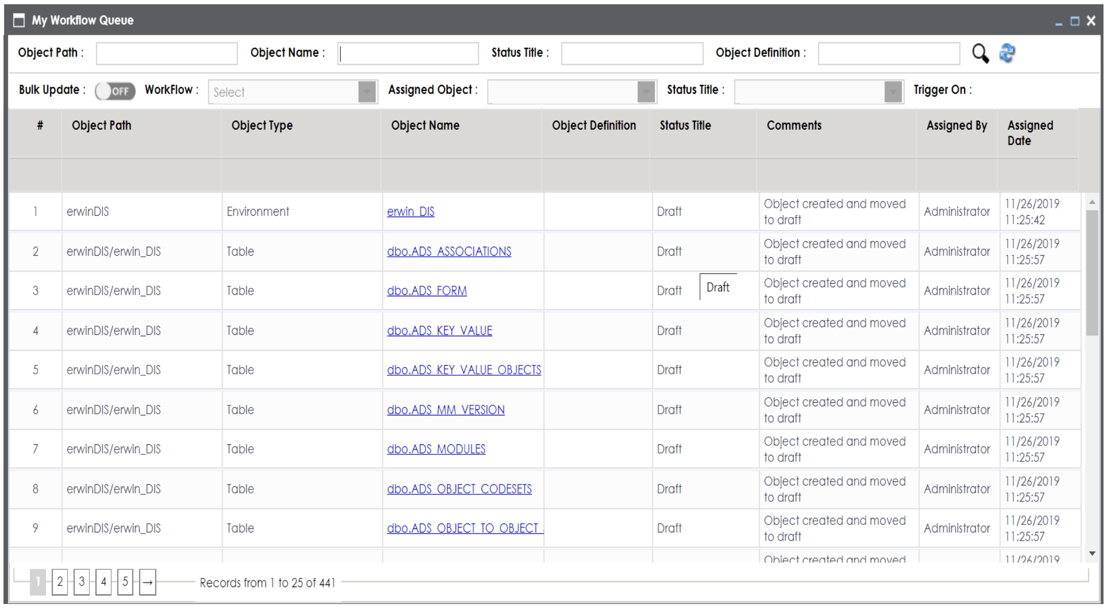
1. Go to **Application Menu** > **Data Catalog** > **Metadata Manager**.

   The following page appears.

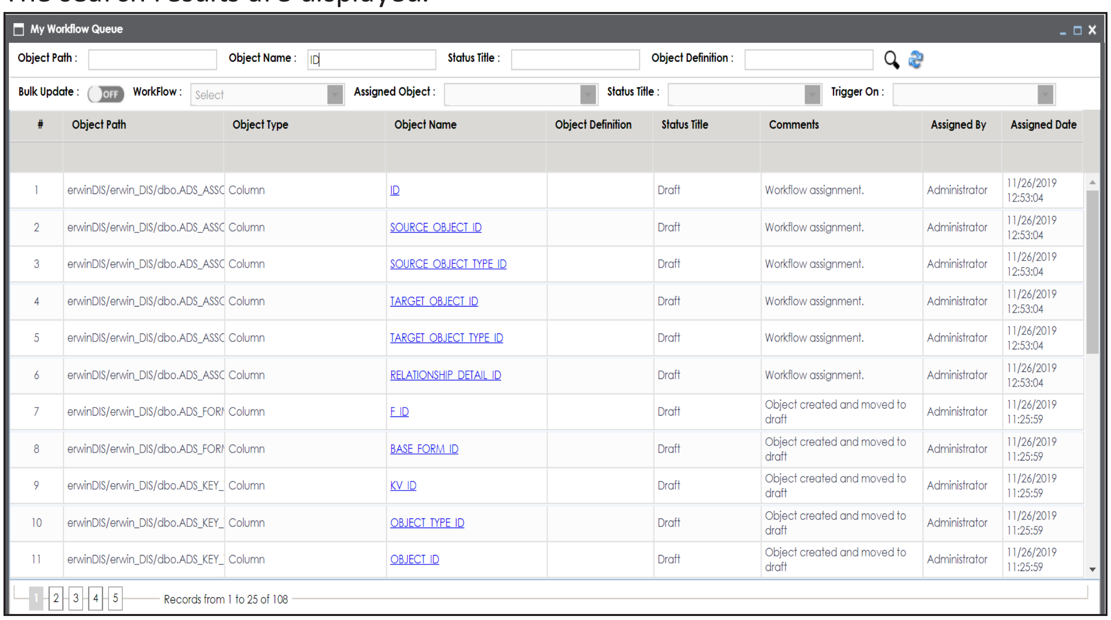
2. Click .
3. Click **My Workflow Queue**.

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



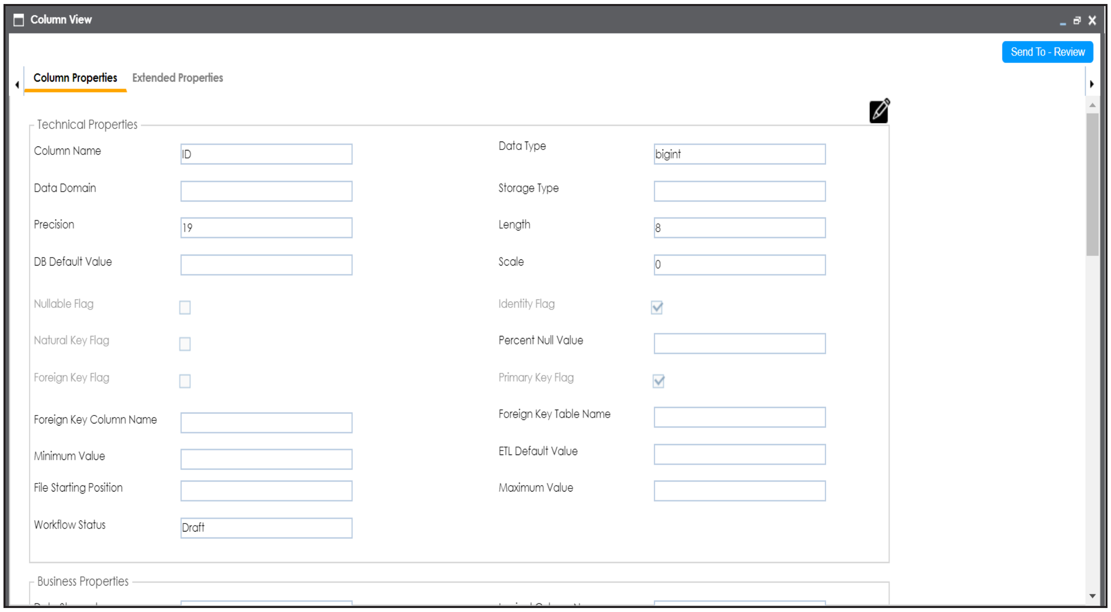
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search results are displayed.



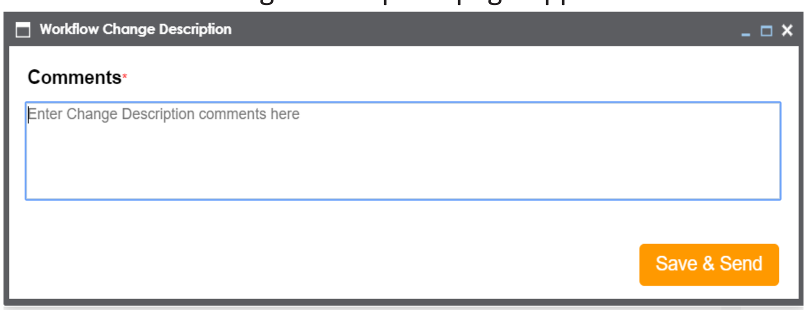
5. Click the desired <Object Name> which appears as hyperlink.

The Column View page appears.



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

   The Workflow Change Description page appears.



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

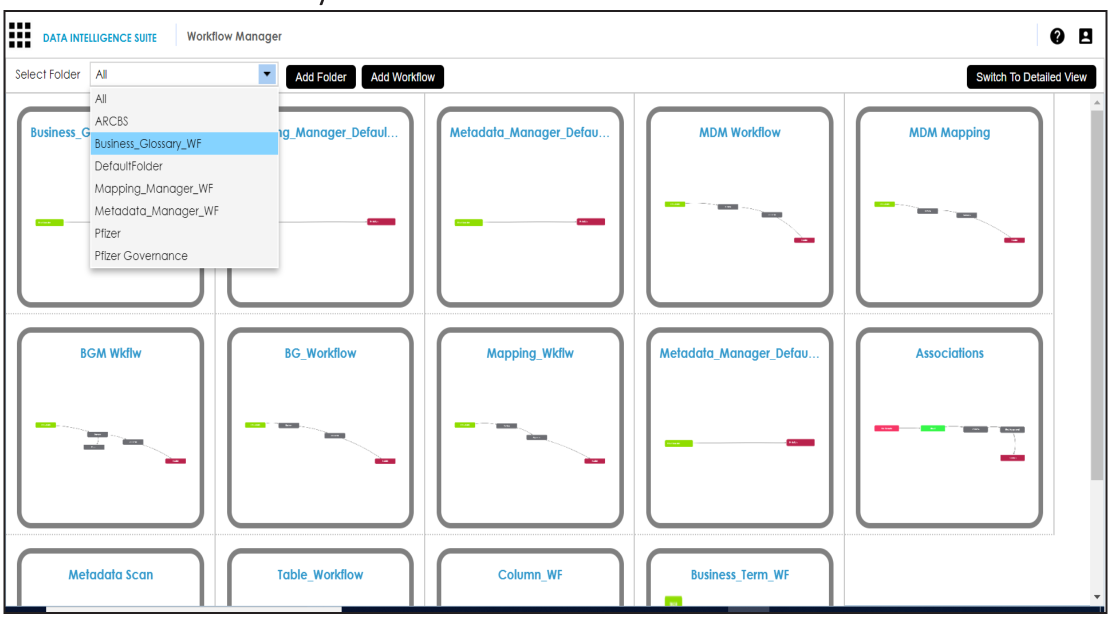
After creating a folder, adding a workflow to the folder, and configuring the workflow, you can assign the workflow to business terms in the Business Glossary Manager.

You should take a note of the following things:

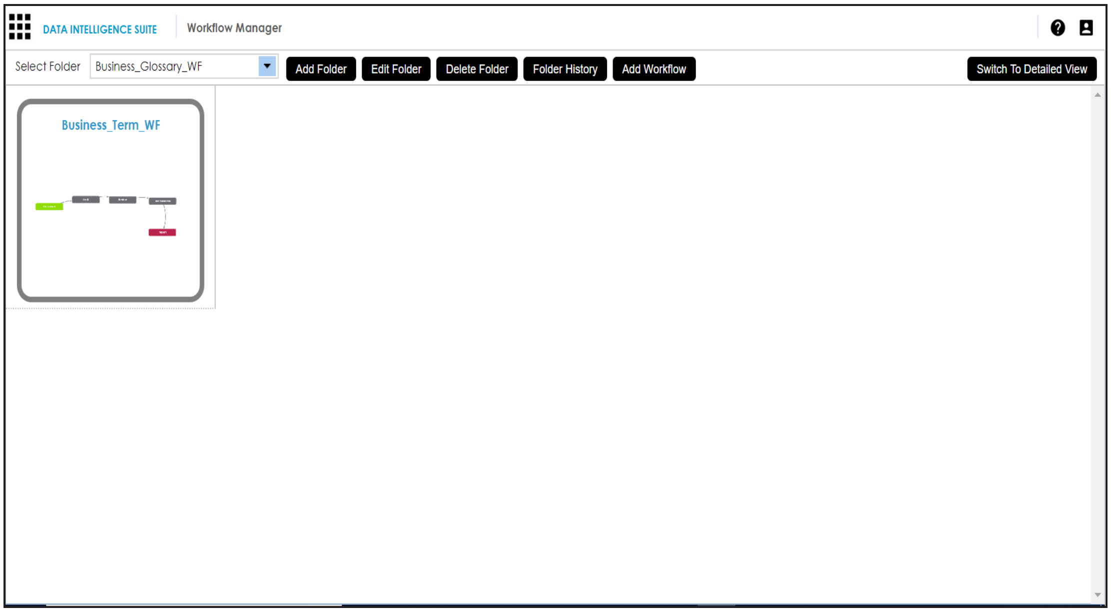
- Ensure that you specified the module as **Business Glossary Manager** and the object as **Business Term** while adding the workflow to the folder.
- The default workflow, Business_Glossary_Default_Workflow is assigned to all the business terms. Hence, you need to override the existing default workflow.

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.



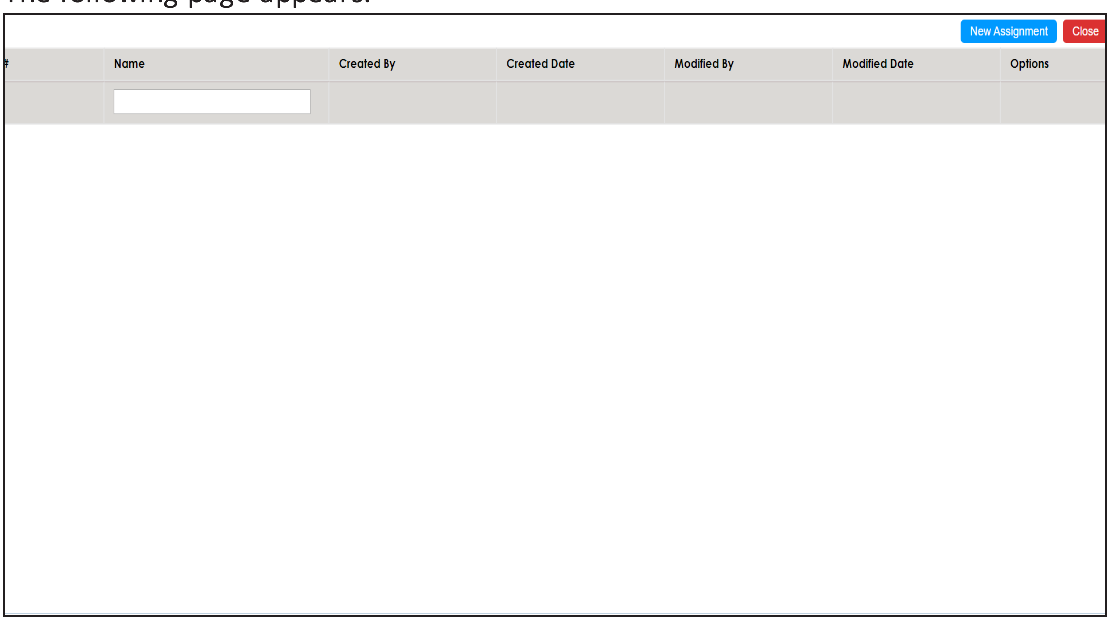
All the workflows added to the folder appear.



3. Hover over the workflow to be assigned.

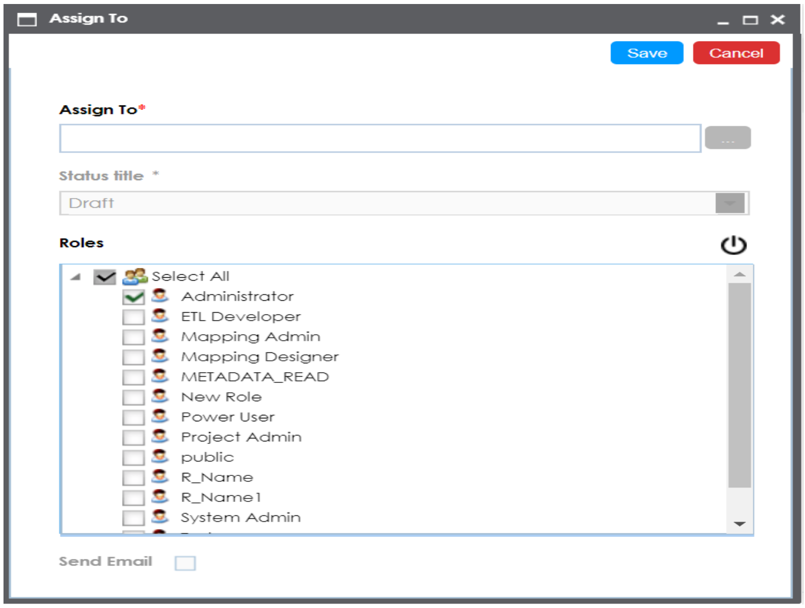
4. Click ⊕.

   The following page appears.



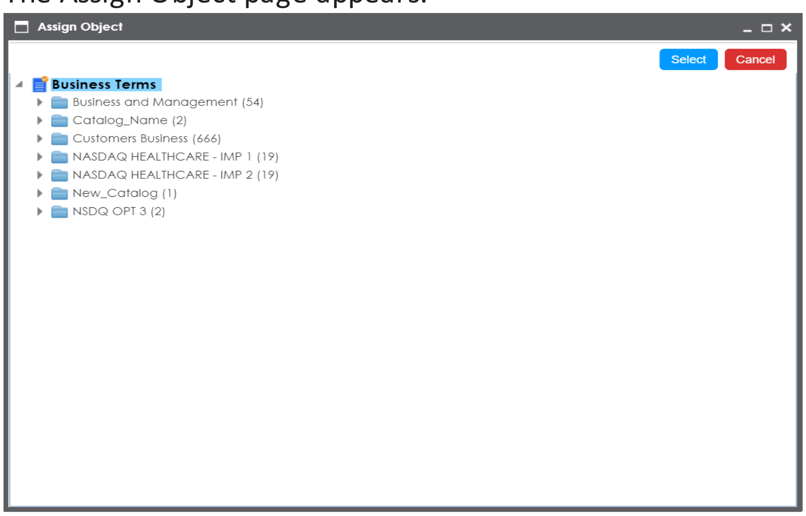
5. Click **New Assignment**.

The Assign To page appears.



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

   The Assign Object page appears.

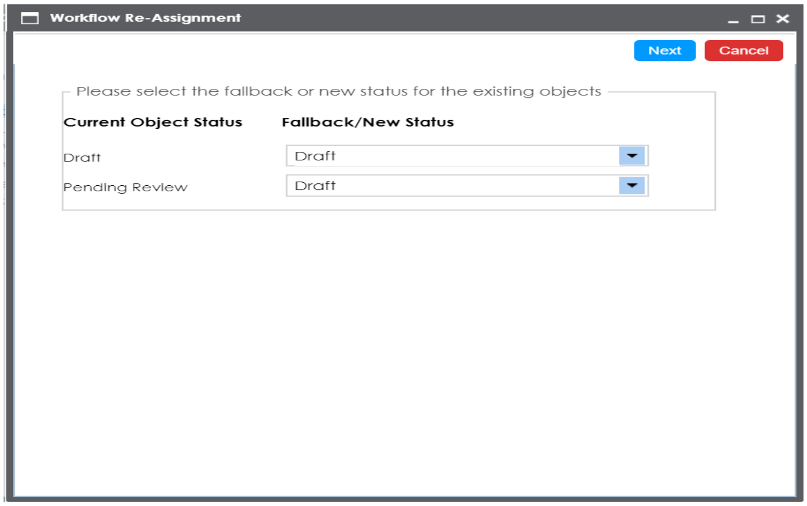


7. Click the catalog which contains the business term to be assigned and click **Select**.

   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 Fall-back/New Status of the business terms.

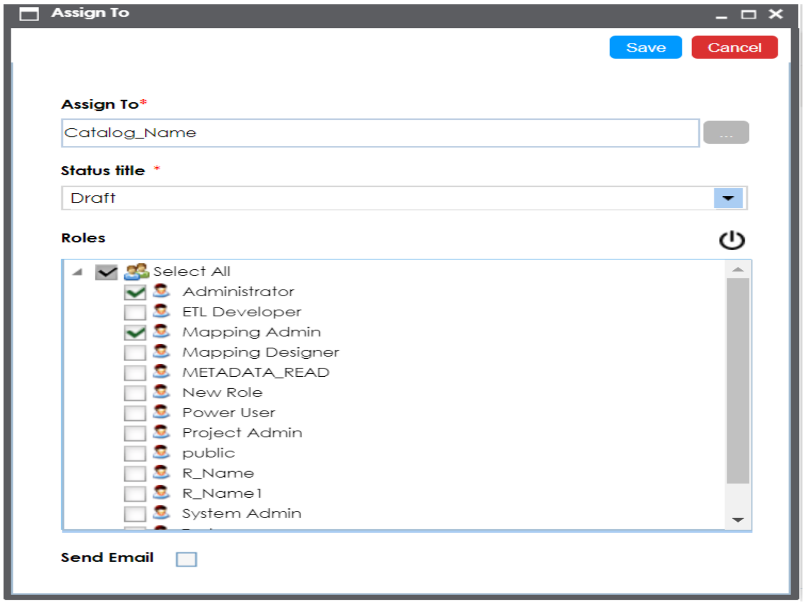


9. Select the appropriate **Fallback/New Status**.
10. Click **Next**.

    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.

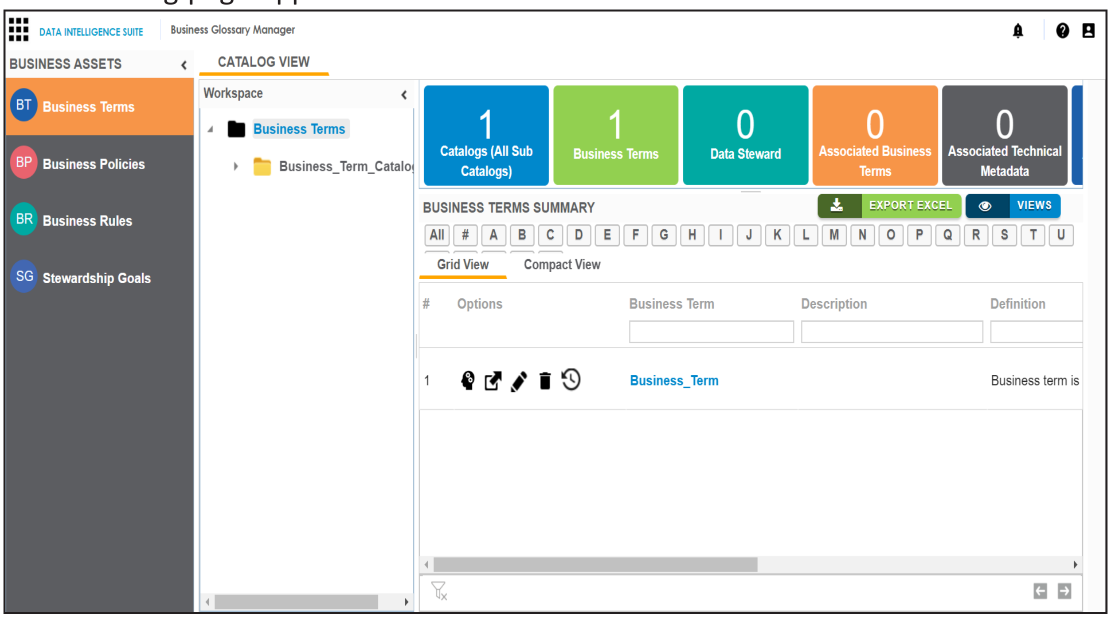
Executing workflows involves:

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:

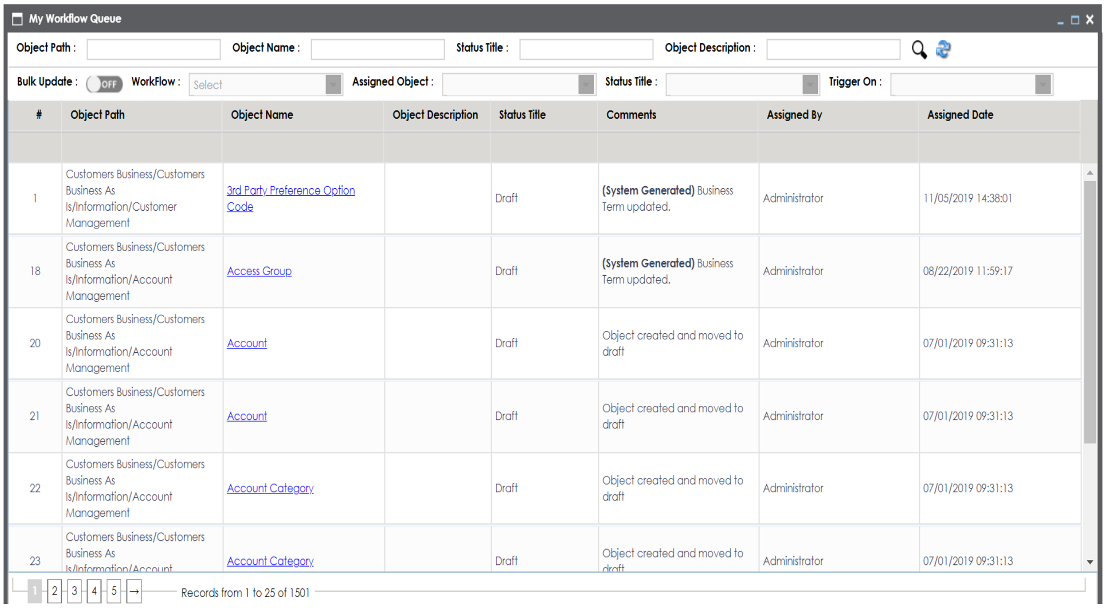
1. Go to **Application Menu** > **Data Literacy** > **Business Glossary Manager**.

   The following page appears.

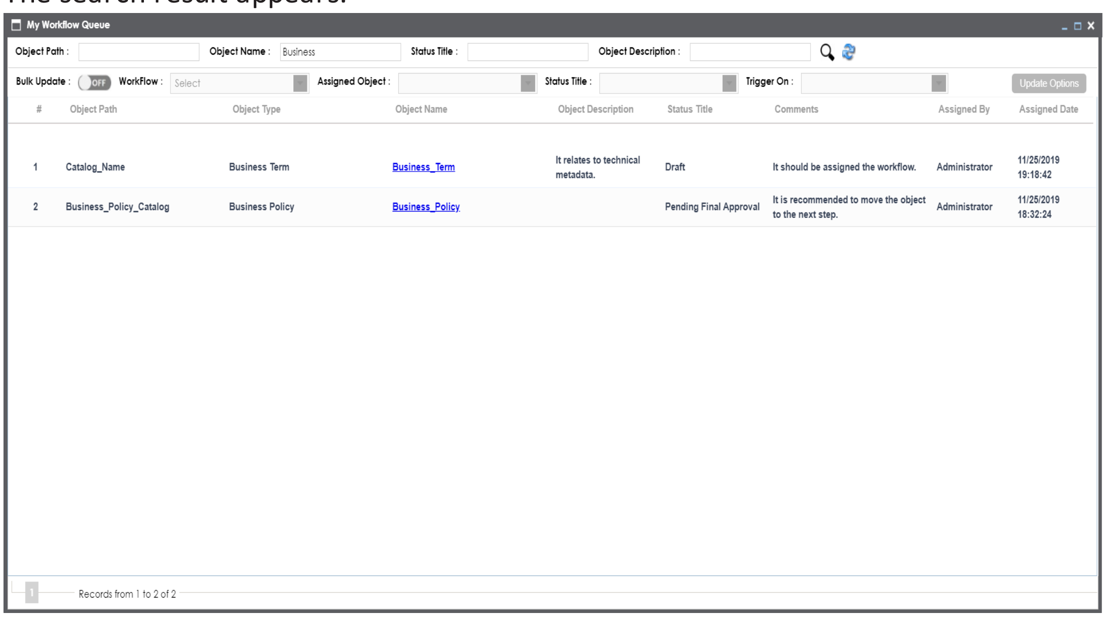
2. Click .
3. Click **My Workflow Queue**.

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



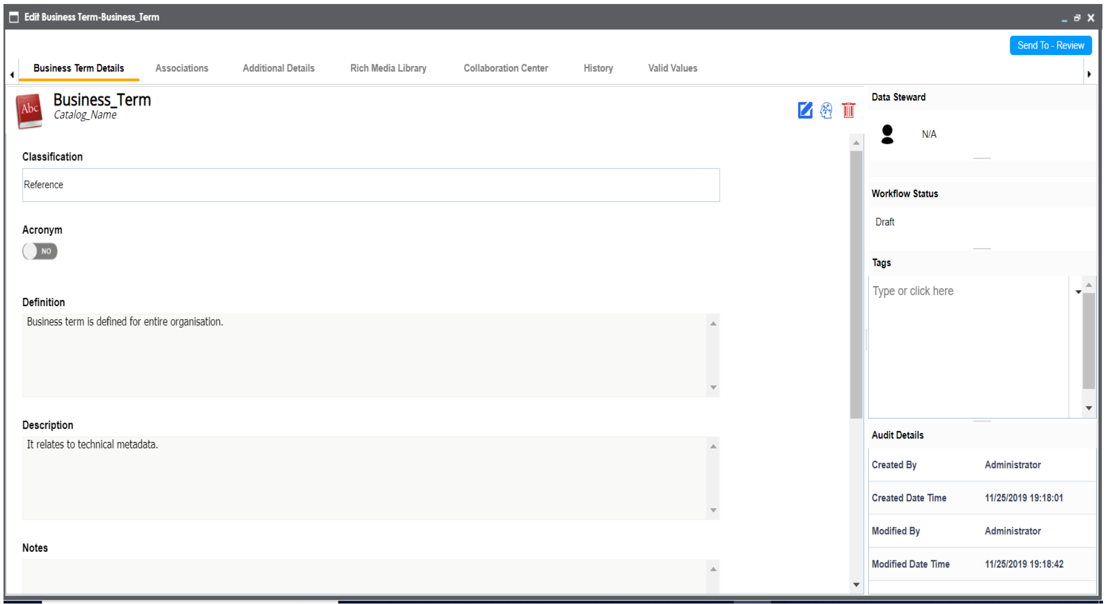
4. Search the object for which you wished to execute the workflow. You can search the object by entering any of the fields namely, Object Path, Object Name, Status Title, and Object Description and clicking .

   The search result appears.



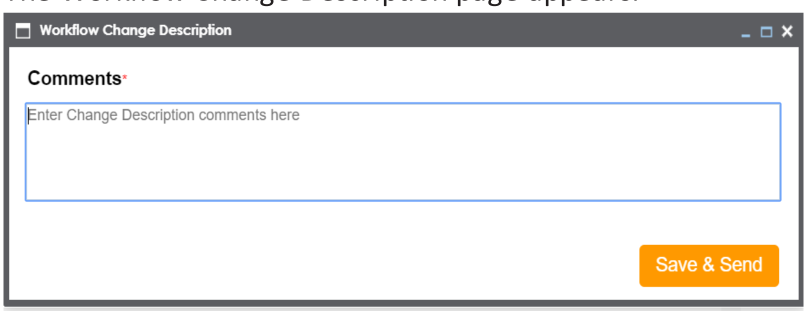
5. Click the <Object Name> appearing as a hyperlink.

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



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

   The Workflow Change Description page appears.



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

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

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

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

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

Assigning Workflows to Business Rules

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

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:

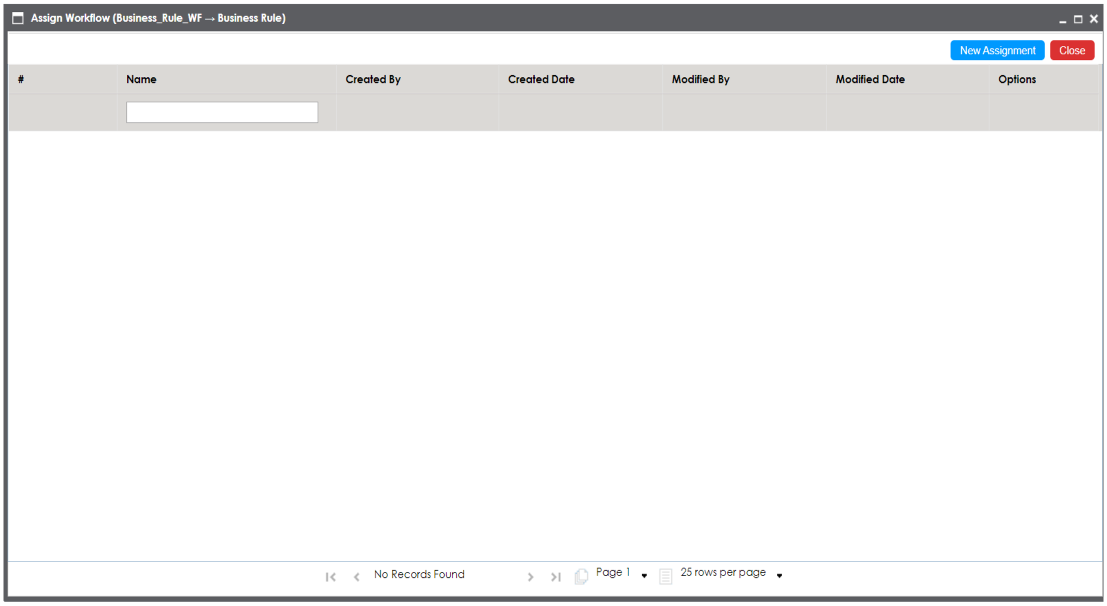
1. Go to **Application Menu** > **Miscellaneous** > **Workflow Manager**.
2. Select the folder where you added the workflow.

All the workflows added to the folder appear.

3. Hover over the workflow to be assigned.

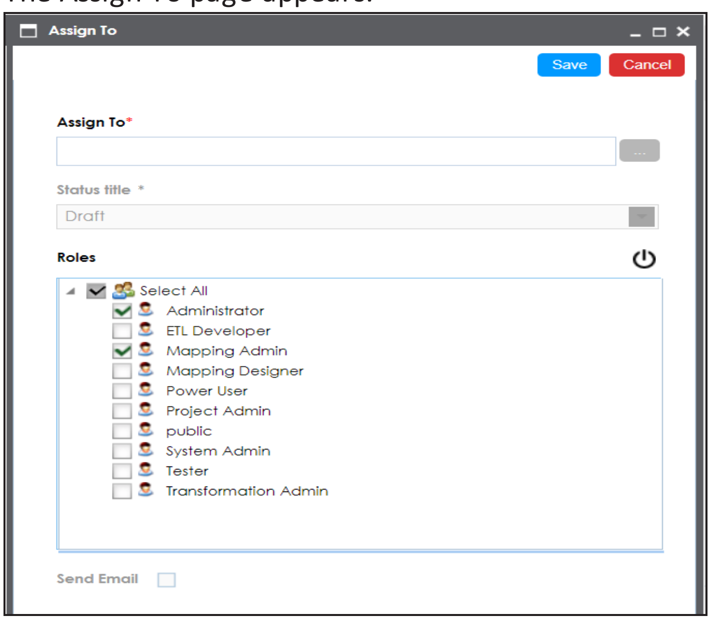
4. Click .

   The following page appears.



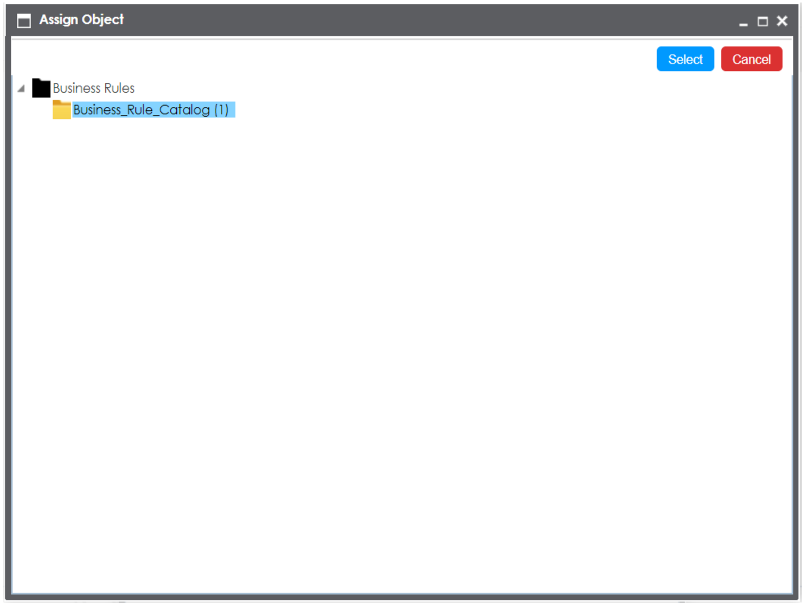
5. Click **New Assignment**.

   The Assign To page appears.

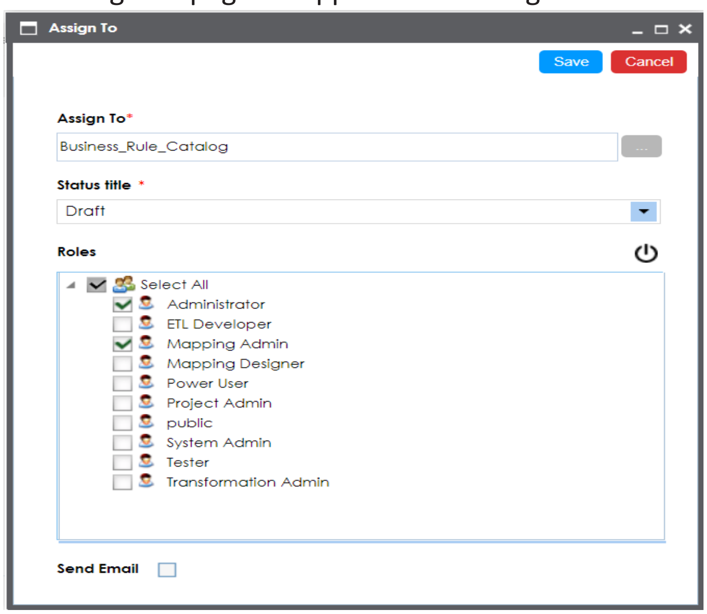


6. In **Assign To** field, click .

   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:

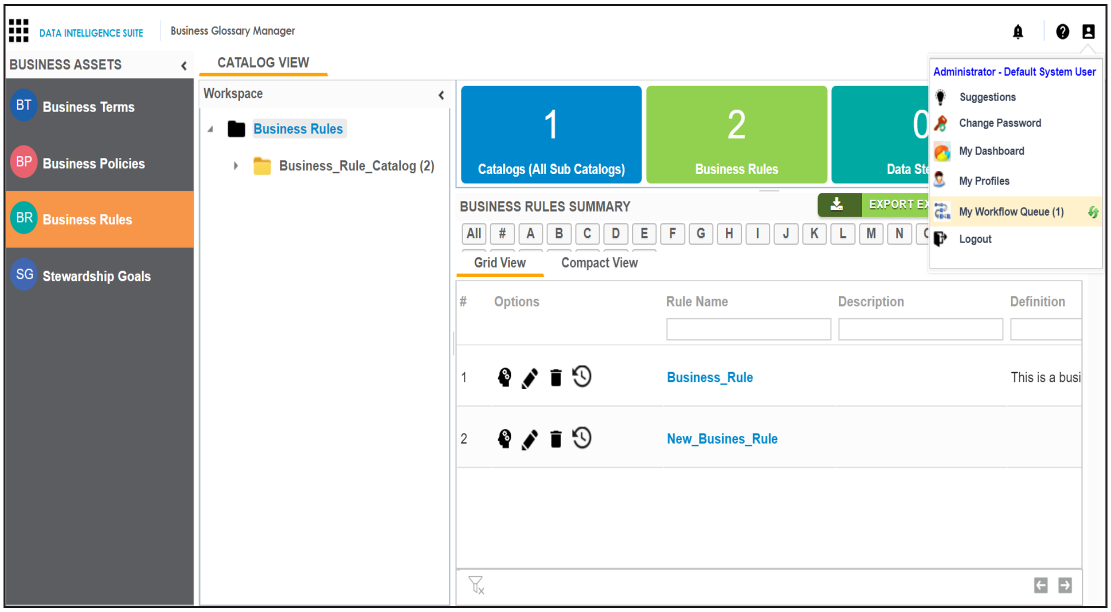
1. Receiving workflow queue notifications
2. Examining and moving the business rules to the next stage

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 .

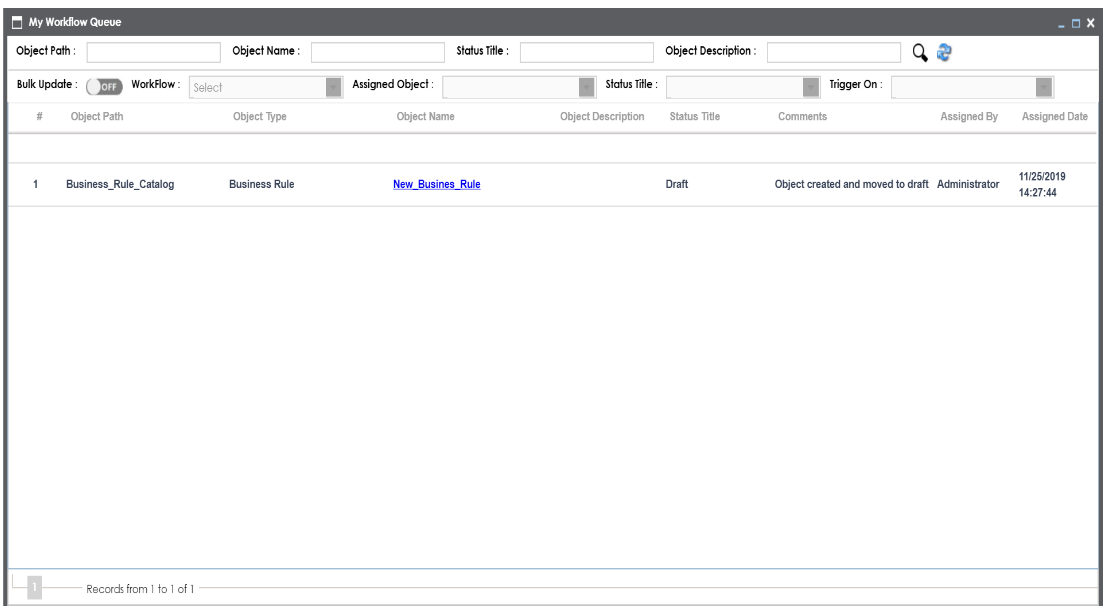
   The Options menu appears.



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 .

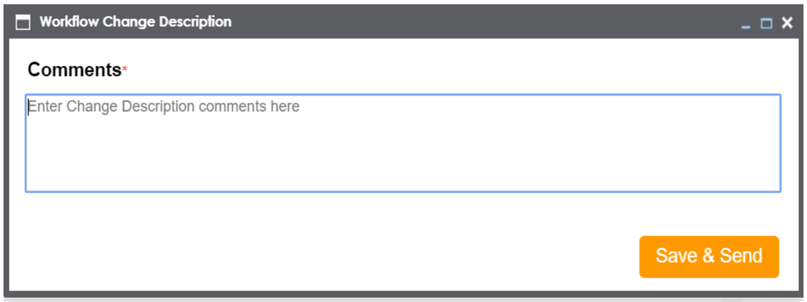


4. Click the <Object Name> appearing as a hyperlink.

   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.



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.

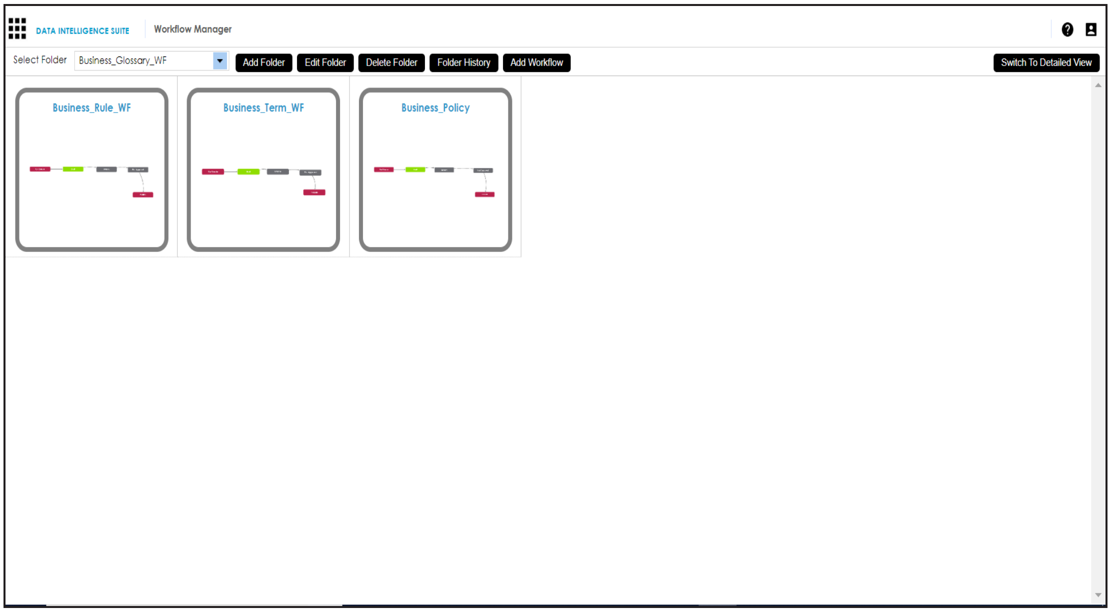
You should take a note of the following things:

- 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:

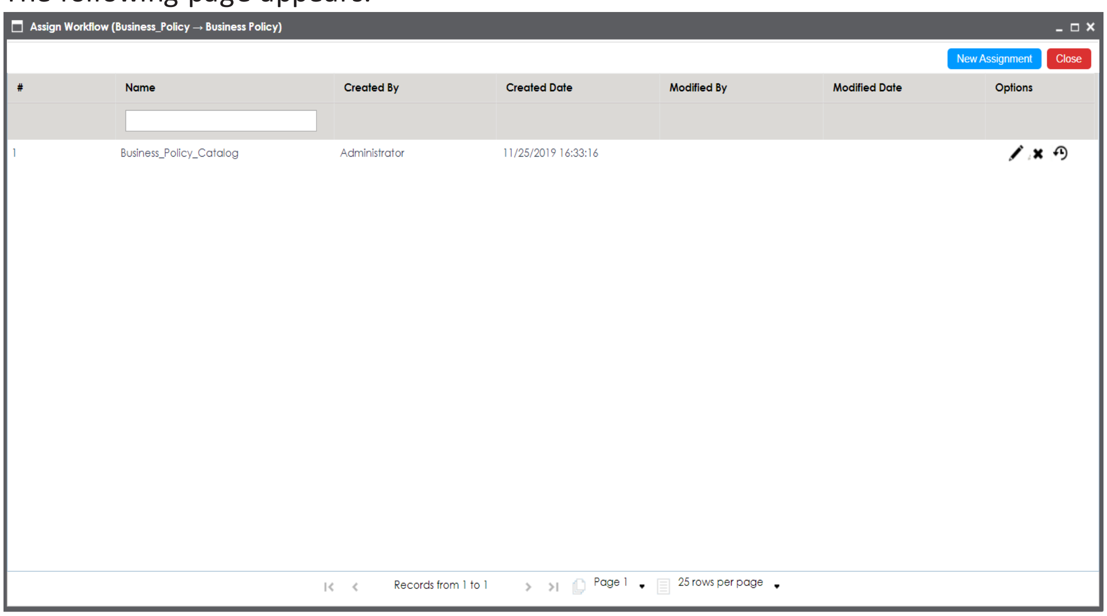
1. Go to **Application Menu** > **Miscellaneous** > **Workflow Manager**.
2. Select the folder where you added the workflow.

All the workflows added to the folder appear.



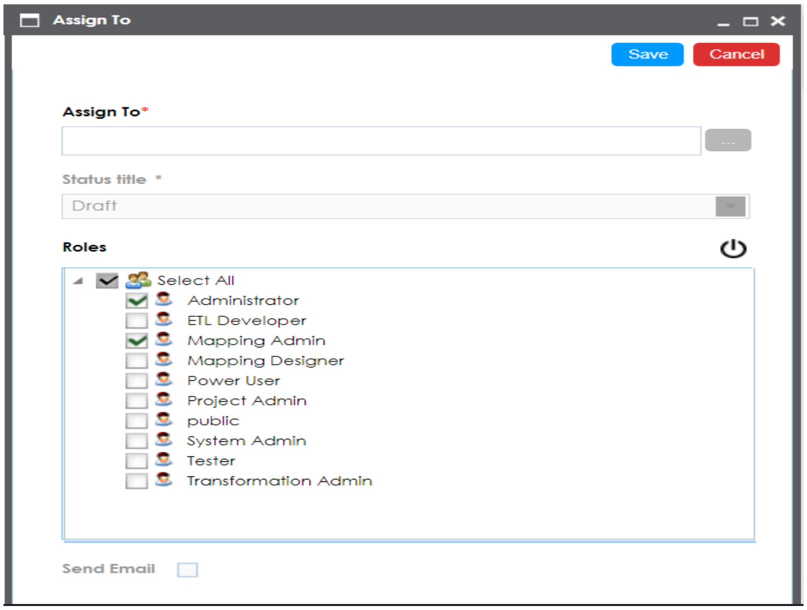
3. Hover over the desired workflow.
4. Click ⊕.

   The following page appears.



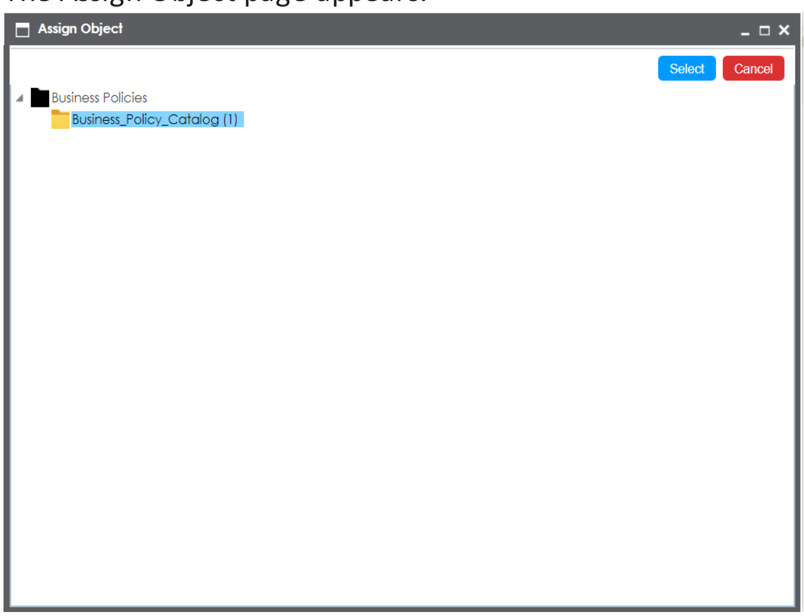
5. Click **New Assignment**.

The Assign To page appears.



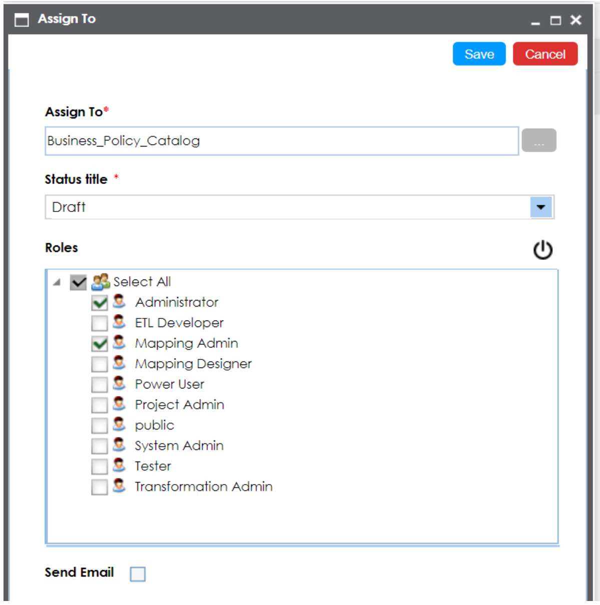
6. In **Assign To** field, click .

   The Assign Object page appears.



7. Click the desired catalog 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 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.

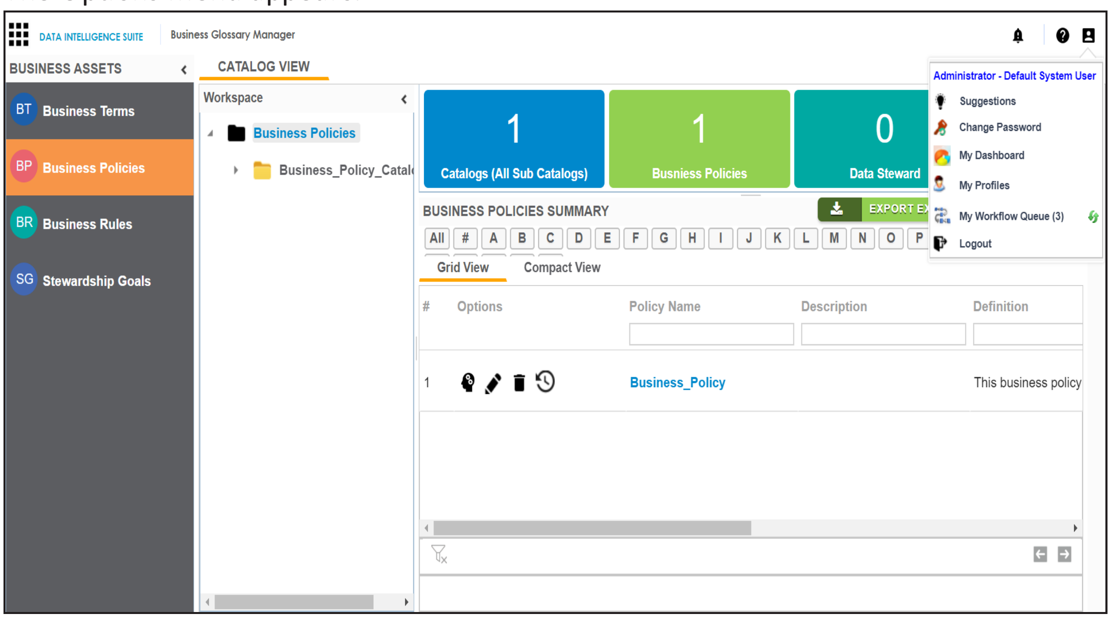
Executing workflows involves:

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 .

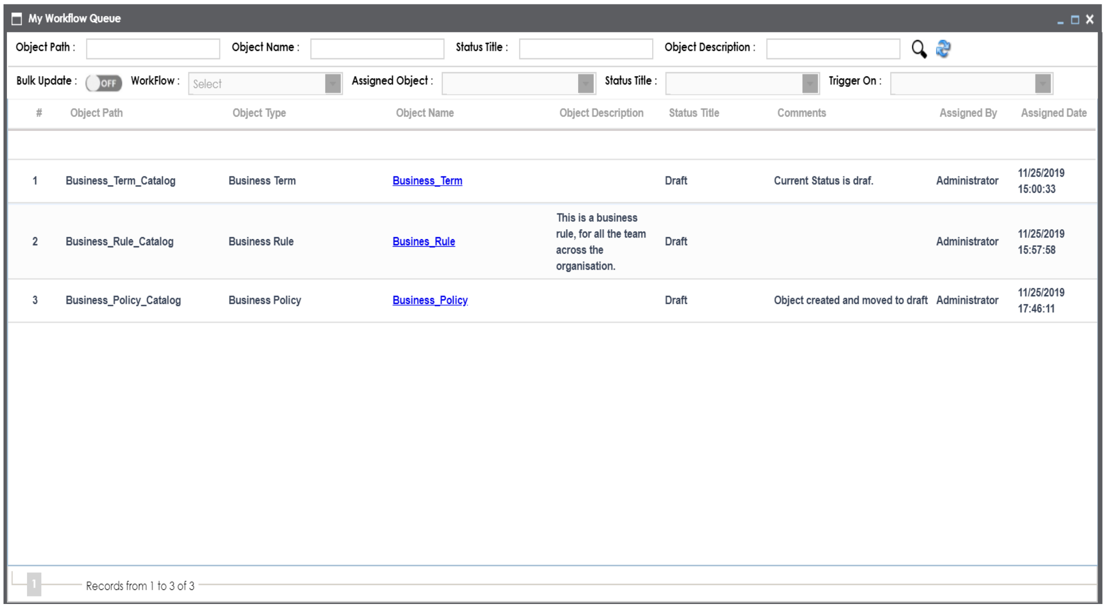
   The Options menu appears.

3. Click **My Workflow Queue**.

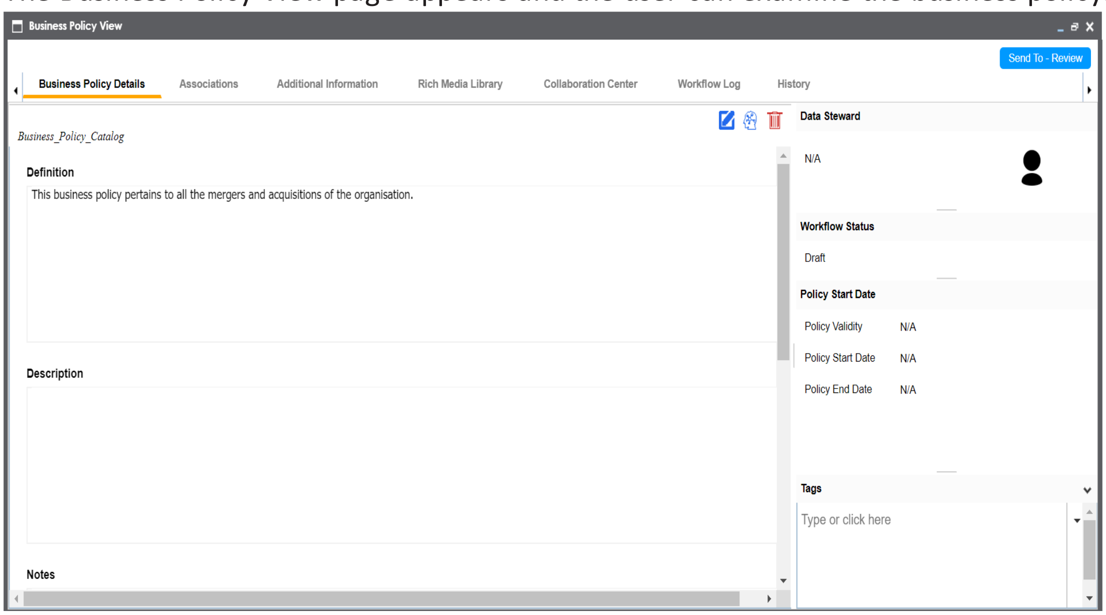
   The My Workflow Queue page appears showing workflow queues of the logged in user.

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



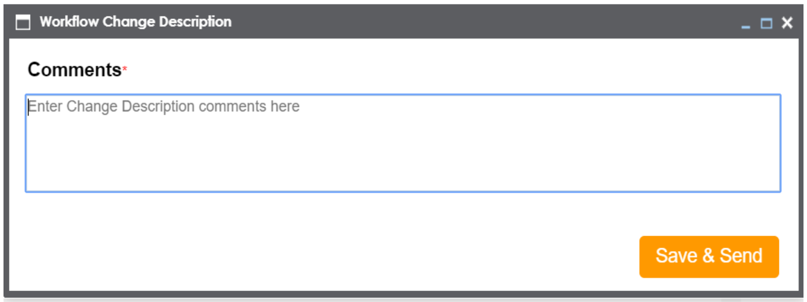
4. Click the **<Object Name>** appearing as a hyperlink.

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



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.