# Technical preview of the workflow feature in IBM® Cloud Private for Data

# Contents

# 1. Overview

**Note: This is a technology preview and is not yet supported for use in production environments.**

Workflow is a verification process that is used when data in the catalog changes. To ensure the highest quality of your data, the changes in the catalog are verified by experts before they're available to all users.

Workflow applies when you create, edit or delete a glossary asset. An editor works on an asset, and a reviewer revises the changes and provides feedback. When this review cycle is done, the editor requests publishing of this asset, which starts the workflow process. A new task to approve the asset is created. An approver sees this task on the list of open tasks, reviews the asset and approves it. A task to publish the asset to the catalog is created automatically. This time, a publisher needs to work on the task. When the asset is published, the task is closed, and the updated asset is available in the data catalog to everyone.

When you enable workflow, the following asset types can be edited only by using the workflow process:

- Terms
- Categories
- Information governance policies
- Information governance rules

## Workflow roles

The users can have the following workflow roles:

**Editor -** editors are responsible for creating, and editing assets, and for marking assets for deletion. When they're finished with the work, they must request publishing or deleting of the asset. If the request is approved, the asset is automatically sent for publishing or deletion. If the request is rejected, editors must apply the feedback and request the publishing or deletion again.

**Reviewer** - reviewers are responsible for revising changes that are made by editors. They can access draft and modified versions of assets.

**Approver** - approvers are responsible for approving and rejecting the changes that editors make in the catalog.

**Publisher** - publishers are responsible for publishing and deleting the assets. They can also reject the requests.

## Asset states

In workflow, assets can have three states - draft, modified and published. This state reflects the version of the asset that you can view.

**Draft** - a draft asset is a newly created asset that doesn't have a published version. Only users with appropriate user roles can view draft assets.

**Modified** - a modified asset is an asset that was published and then edited. Only users with appropriate user roles can view modified versions of assets.

**Published** - a published asset is an asset that all users can view in the catalog. It might have a modified version that is visible only to users with appropriate user roles.

When you view the details page of a published asset that is being modified, you can easily switch to the modified version by clicking **See modified version**. And the other way around, when you view the details page of the modified asset, you can view the published version by clicking **See published version**.

## Workflow states

Workflow states reflect where in the workflow process the asset currently is.

**Workflow not started** - in this state, an asset isn't ready yet, and an editor is working on it. It can be a draft of a new asset, or a modified asset.

**Pending approval** - in this state, the changes are ready, but not verified yet. The asset might also be marked for deletion. The asset must be approved by an approver.

**Ready for publishing** - in this state, the changes were successfully verified, but the new version isn't available in the catalog yet. The asset must be published by a publisher.

**Ready for deleting** - in this state, the asset that was marked for deletion was successfully verified, but the asset still exists in the catalog. The deletion must be approved by a publisher.

## Asset history - Activities panel

When you have a workflow role assigned, you can see the history of changes for a given asset. It's available in the asset details page, in the **Activities** panel. The panel contains information about what changes were made, when, and which user made them, and comments. You can add comments directly in the panel, or when working on tasks.

## 2. Enabling workflow

To enable workflow, complete the following steps:

1. Go to **Organize** > **Data catalog**.
2. In the URL, add the feature flag `featureTechPreview=on`, as in: `https://`*`host`*`:`*`port`*`/ibm/iis/igcui/discover?featureShowInZen=on&featureTechPreview=on`
3. Open the **Workflow** tab.
4. To confirm that you want to enable workflow, click **Enable**.

## 3. Assigning workflow roles

Before you can work with tasks, you must assign workflow roles to users. Complete the following steps:

1. Access Administration Console at `https://`*`host`*`:`*`port`*`/ibm/iis/console/`.
2. For the procedure steps, see the Assigning workflow roles topic.

## 4. Working with workflow tasks

When editors update glossary assets, they start the workflow process to approve the changes and publish them to the catalog.

When changes are made to the catalog, first, the task to request publishing of the asset is created automatically. When an editor requests publishing of the asset, a new task to approve the asset is created automatically. Then, when an approver approves the asset, a new task to publish the asset is created automatically.

To see the lists of open and completed tasks, go to **Organize** > **Data catalog** > **Workflow**. You can see only the tasks to which you're assigned. For example, if you're an approver, you can see only the approve tasks, and not publish tasks. If you have more than one role assigned, you can see various types of tasks in the lists.

**Task assignees**

Task can have many assignees. The assignees are added to each task based on the workflow role. For example, all users with the approver role can see all tasks for approving the assets.

**Claiming tasks**

Usually, the tasks are handled immediately by assignees. If you want to spend more time on a task, you can let other assignees know about it by claiming a task. When you click

**Claim task**, other assignees see that you're currently working on that task, and they can't work on it.
If you decide that you no longer want to work on the task that you claimed, click **Return task**. Other assignees can then work on that task.

## 5. Creating glossary assets

To create a glossary asset when workflow is enabled, complete the following steps:

1. Go to **Organize** > **Data catalog**, and from the **Create** menu, select the asset type that you want to create.
2. Provide asset details.
3. Save the changes. The task to request publishing is created automatically.
4. Request publishing of the asset in one of the following ways:
   - In the details page of the asset, click **Request publishing**.
   - In **Data catalog** > **Workflow** > **Open tasks**, search for the task created for your change, and click **Request publishing**.
     The asset is waiting for an approval.
5. When the approver finishes reviewing your new asset, complete one of the following steps:
   - If your asset was approved, a task to publish it is created automatically. The asset is waiting for an action of a publisher.
   - If your asset was rejected, you must apply the feedback that you received from an approver. After you're done, click **Request publishing** again.

When a publisher approves the request for publishing the asset that you created, the asset is available in the catalog to everyone.

**Note:** If you want to add a relationship for a glossary asset, the asset that you want to add as a target of the relationship must be published.

## 6. Editing glossary assets

To edit a glossary asset when workflow is enabled, complete the following steps:

1. In **Organize** > **Data catalog**, search for the glossary asset that you want to edit and open its details page.
2. From the menu, select **Edit**.
3. Modify the properties according to your needs.
4. Save the changes. The asset now has two versions, published in the catalog, which is available to everyone, and the modified that contains your latest changes, which not everyone can see.

5. Request publishing of the asset in one of the following ways:
   - In the details page of the asset, click **Request publishing**.
   - In **Data catalog** > **Workflow** > **Open tasks**, search for the task created for your change, and click **Request publishing**.
     The asset is waiting for an approval.
6. When the approver finishes reviewing your updated asset, complete one of the following steps:
   - If your asset was approved, a task to publish it is created automatically. The asset is waiting for an action of a publisher.
   - If your asset was rejected, you must apply the feedback that you received from an approver. After you're done, click **Request publishing** again.

When a publisher approves the request for publishing the asset that you edited, the asset is available in the catalog to everyone.

**Note:** If you want to add a relationship for a glossary asset, the asset that you want to add as a target of the relationship must be published.

# 7. Deleting glossary assets

## Deleting a published asset

To delete a published glossary asset from the catalog when workflow is enabled, complete the following steps:

1. In **Organize** > **Data catalog**, search for the glossary asset that you want to delete and open its details page.
2. From the menu, select **Delete**.
3. Confirm that you want to delete the asset. The task to approve the request is created automatically.
4. Request deleting of the asset in one of the following ways:
   - In the details page of the asset, click **Request deletion**.
   - In **Data catalog** > **Workflow** > **Open tasks**, search for the task related to your change, and click **Request deletion**.
     The asset is waiting for an approval.

   **Note:** If in the meantime you change your mind and you no longer want to delete the asset, click **Cancel deletion**. After you click **Request deletion**, the workflow process is started.

5. If you have the approver role, approve the asset. If the asset isn't approved, the workflow process is started again.
6. If you have the publisher role, review the request and complete one of the following steps:

- To delete the asset, click **Delete asset**. The asset is permanently deleted from the catalog.
- To reject the request, click **Reject deletion** and provide a justification. When you reject the request, the workflow process is started again.

### Deleting a draft of a new asset

To delete a draft of a new asset that isn't available in the catalog yet, complete the following steps:

1. Make sure that the workflow process wasn't started for the asset.
    - If the asset is pending for approval, an approver must reject the request.
    - If the asset is ready for publishing, a publisher must reject the request.
2. Delete the draft in one of the following ways:
    - In the details page of the asset, click **Delete draft**.
    - In **Data catalog** > **Workflow** > **Open tasks**, search for the task related to your change, and click **Delete draft**.

## 8. Approving assets

Before the assets are sent for publishing, a user with the approver role must review them and decide whether it's safe to publish them to the catalog. You can approve new assets, changes to existing assets, or deletion requests.

Complete the following steps:

1. Go to **Organize** > **Data catalog** > **Workflow**.
2. Select the task that you want to work on. You can sort the list by the following factors:
    - Recently opened
    - Due soon

    Alternatively, the actions to approve or reject assets are also available in the details page of the asset.

3. Review the request and do one of the following steps:
    - To approve the asset, click **Approve new asset**, **Approve changes**, or **Approve deletion**. The asset is sent for publishing approval, or deletion approval.
    - To reject the asset, click **Reject draft**, **Reject changes**, or **Reject deletion** and provide a justification. When you reject the asset, the workflow process is started again, and an editor must apply further changes to the asset.

# 9. Publishing assets

Before the assets are available to everyone in the catalog, a user with the publisher role must review them and decide whether it's safe to publish them to the catalog. You can publish new assets, and changes to existing assets.

Complete the following steps:

1. Go to **Organize** > **Data catalog** > **Workflow**.
2. Select the task that you want to work on. You can sort the list by the following factors:
   - Recently opened
   - Due soon

   Alternatively, the actions to publish or reject the assets are also available in the details page of the asset.

3. Review the request and complete one of the following steps:
   - To publish the asset, click **Publish new asset**, or **Publish changes**. The asset is published to the catalog.
   - To reject the asset, click **Reject draft**, or **Reject changes**, and provide a justification. When you reject the asset, the workflow process is started again, and an editor must apply further changes to the asset.