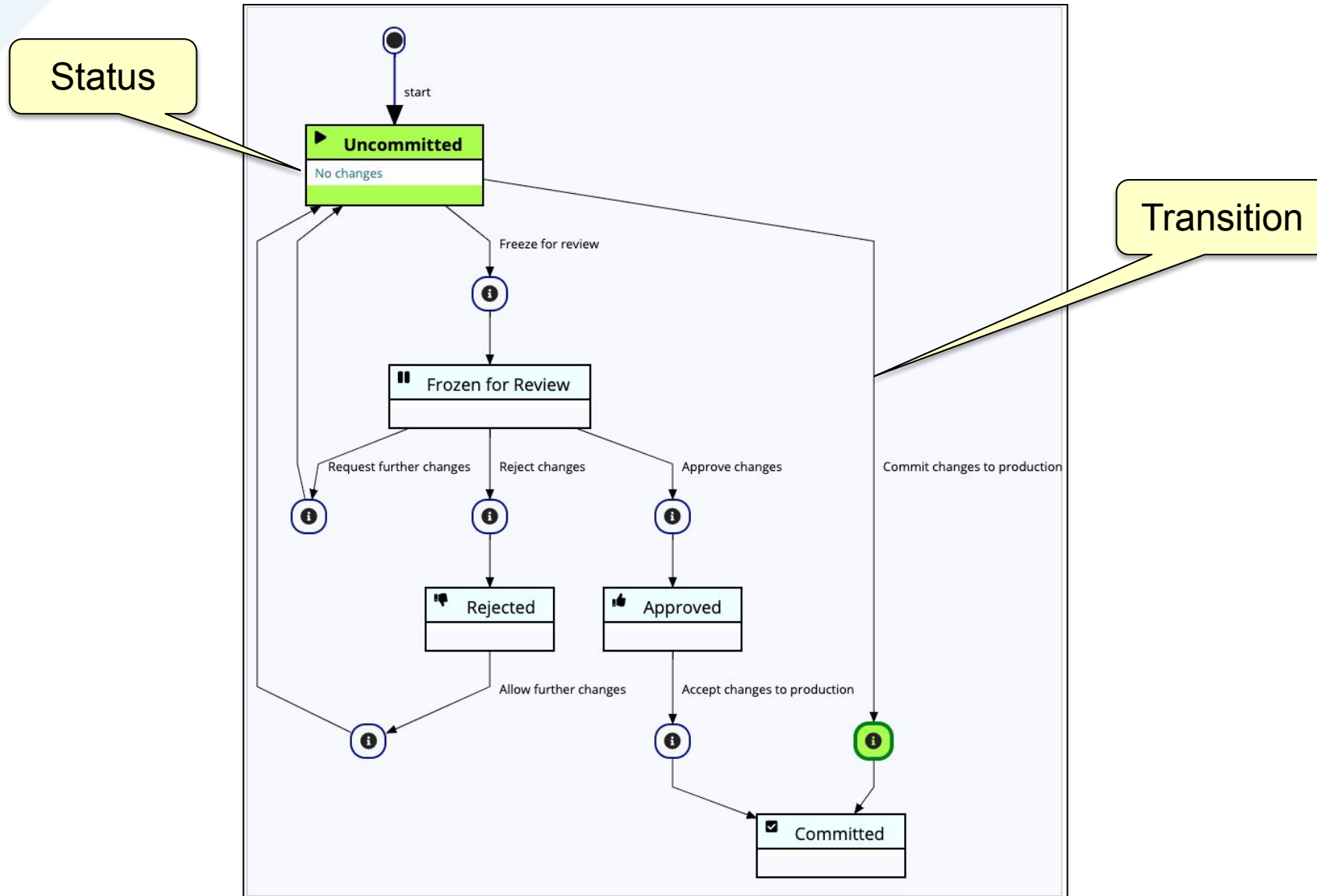


Custom Workflow Templates

What is a Workflow?

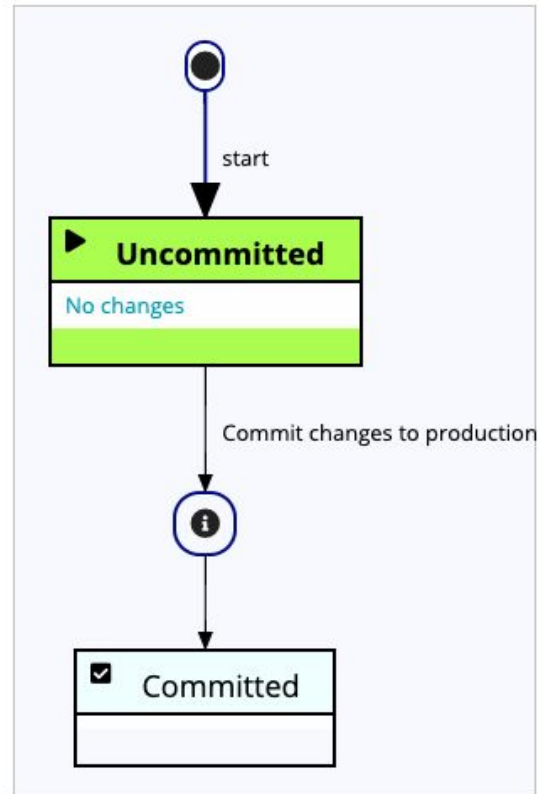
- Workflow – a sequence of steps to revise a collection.
- States – the status set that a workflow can be in.
- Transitions – describes the change from one state to another (from, to, events to execute)
- Actors – who can change a state.

What is a Workflow?



What is a Workflow?

No Review Workflow



What is a Workflow?

No Review Workflow

Initial status of the workflow.

Uncommitted

Committed

"Committed" is always the final status.

from

to

Commit changes to production

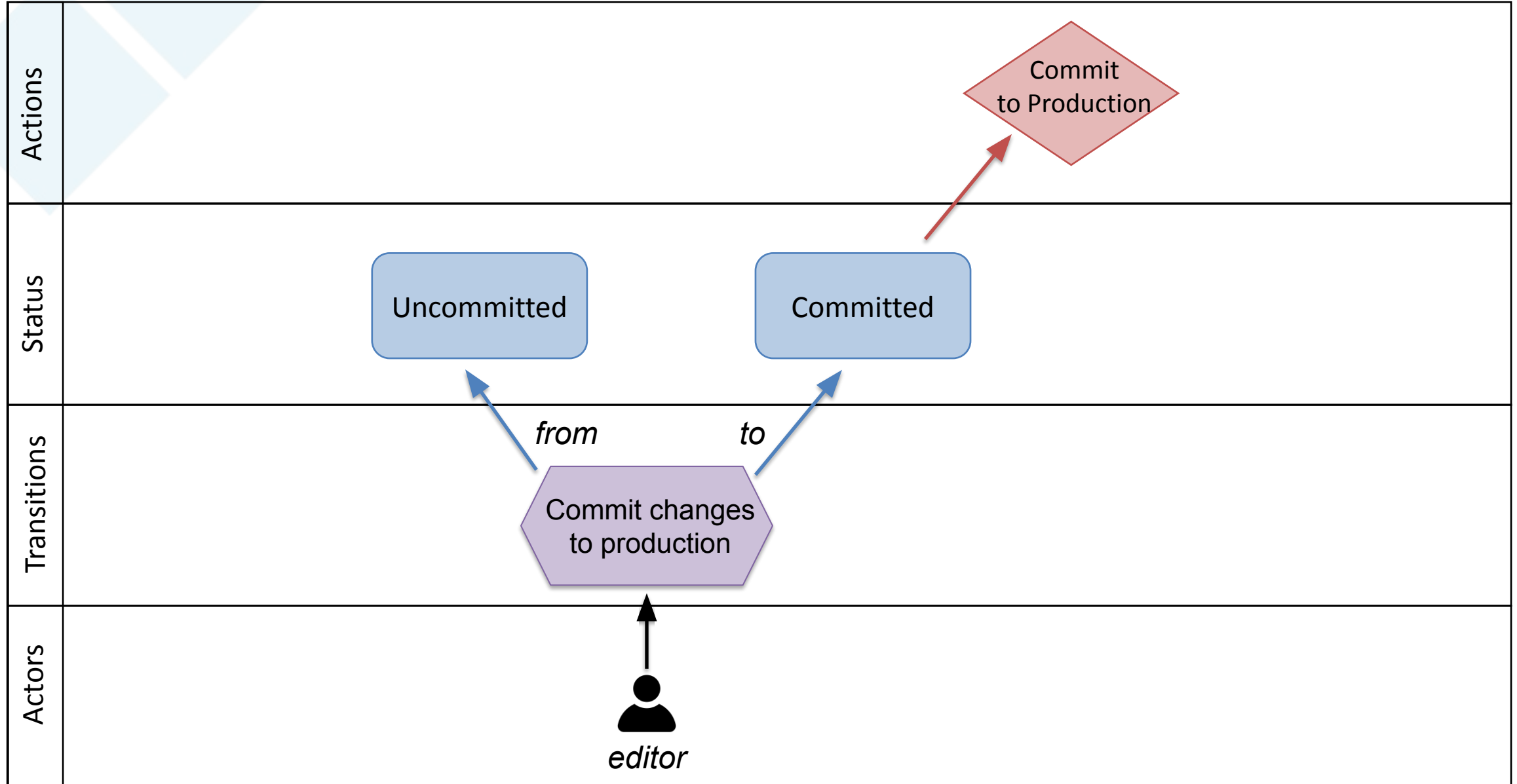
role permission



editor

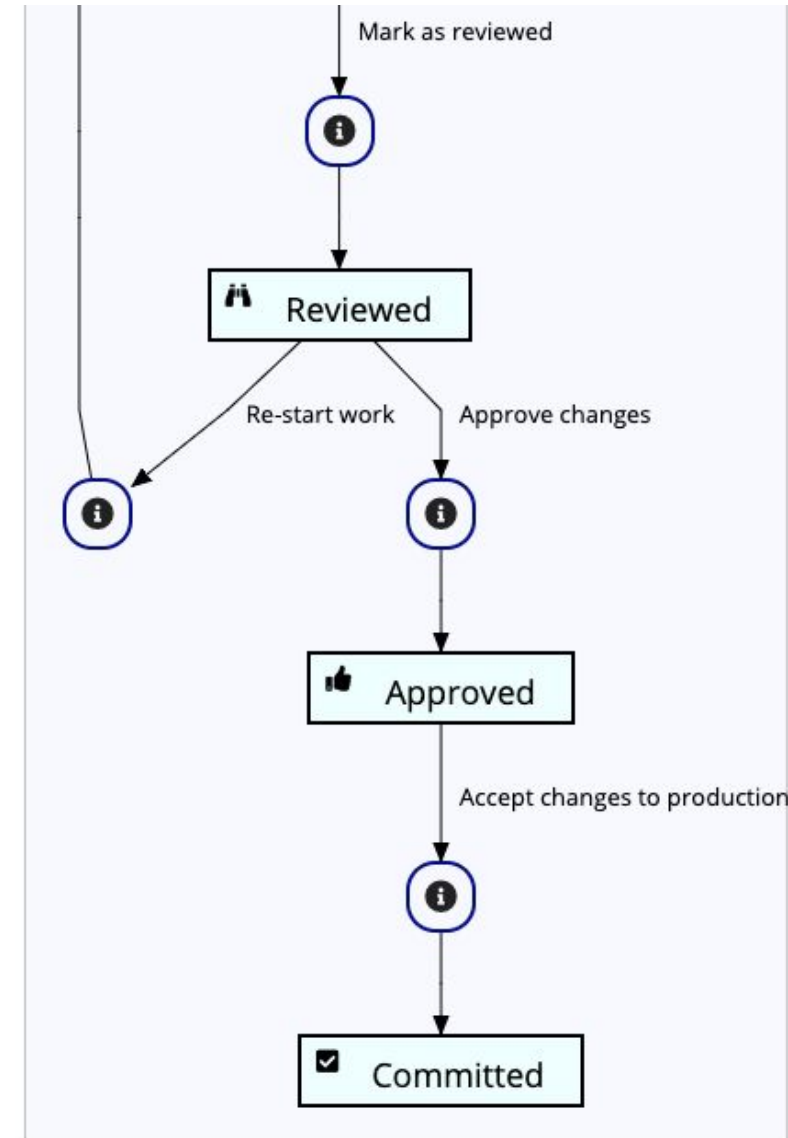
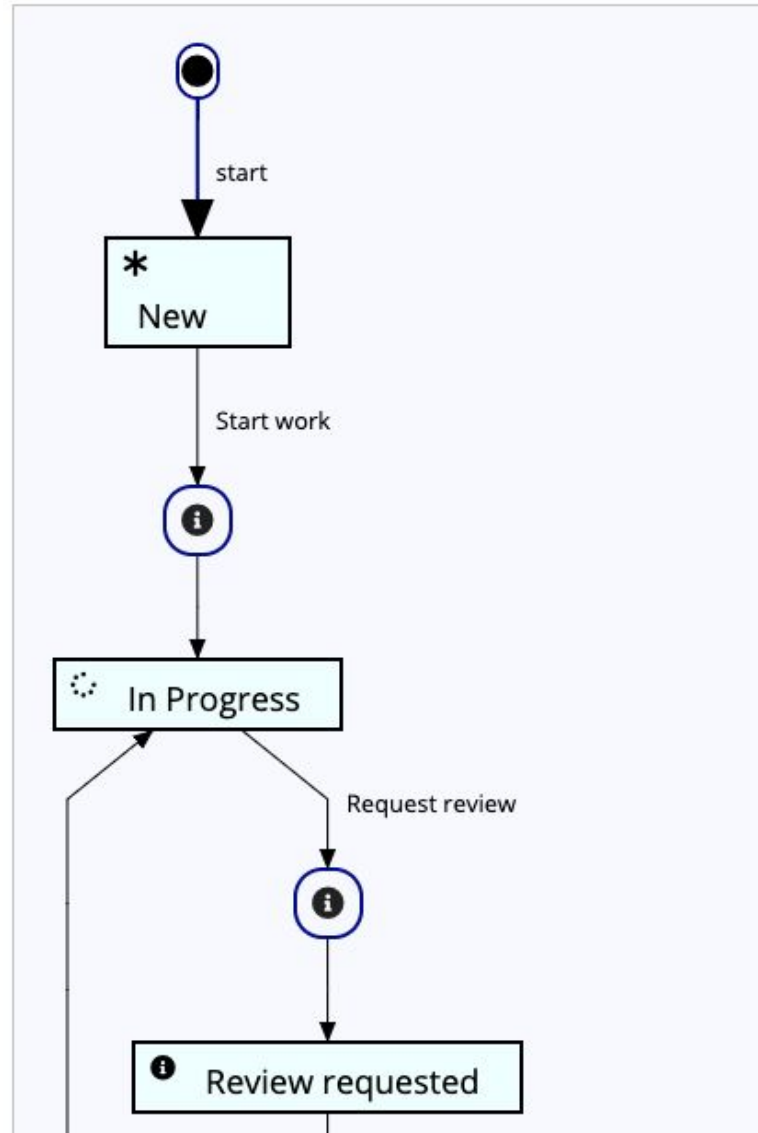
(Governance Role)

No Review Workflow



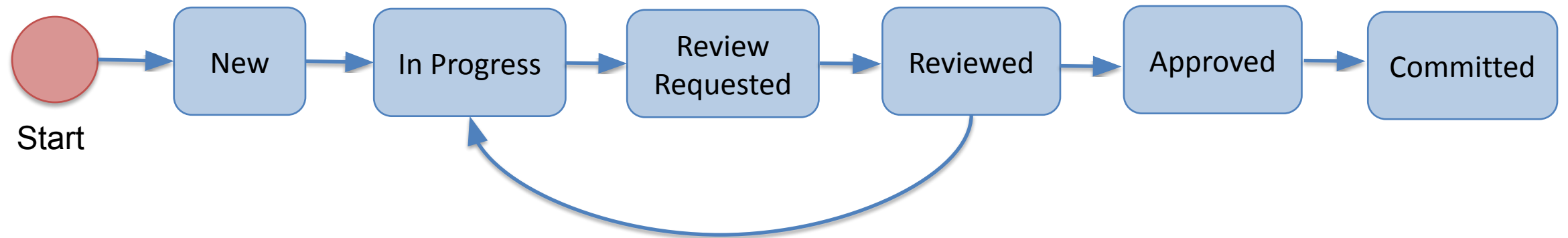
Glossary Workflow

What is a Workflow?

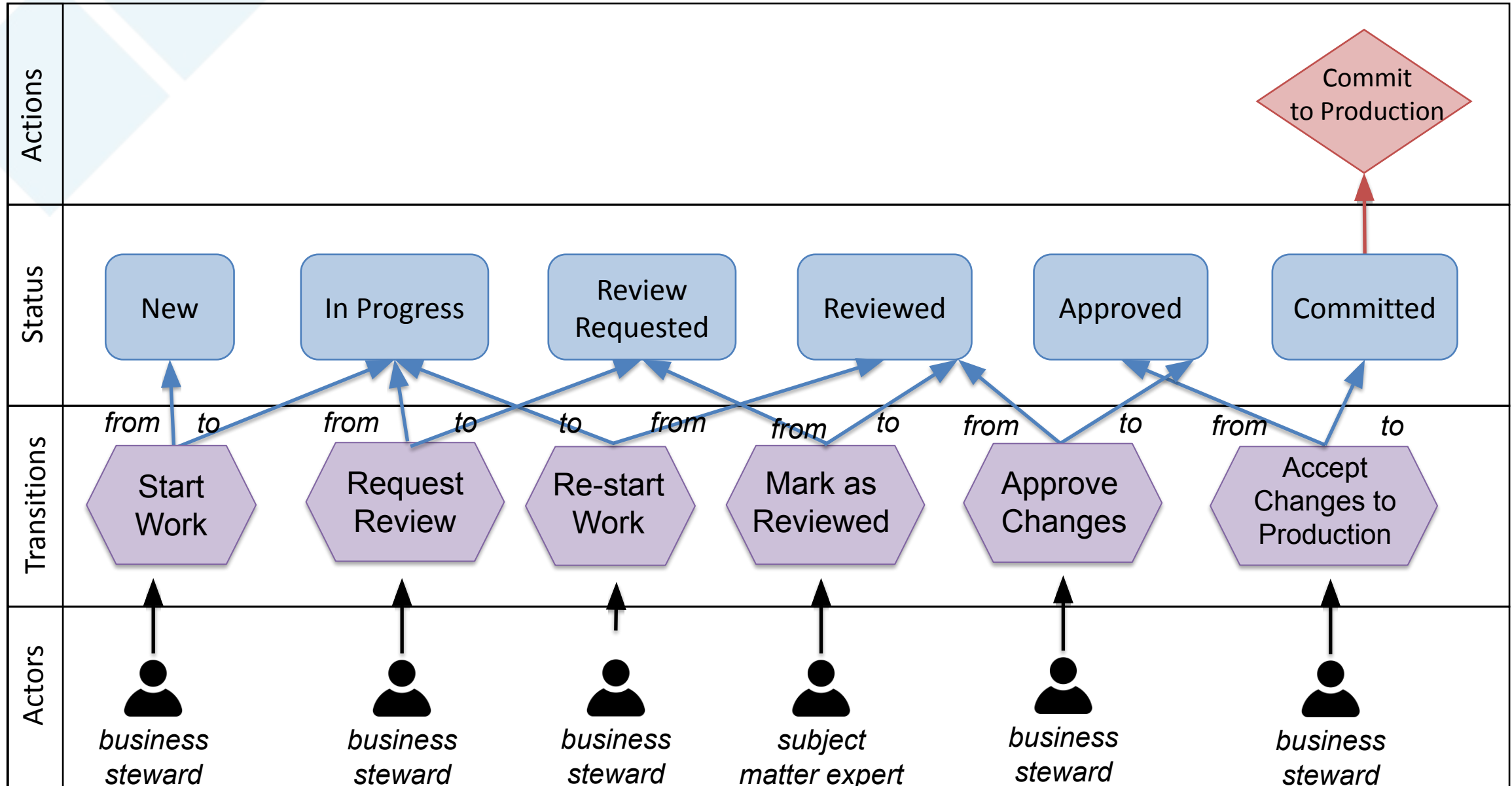


What is a Workflow?

Glossary Workflow



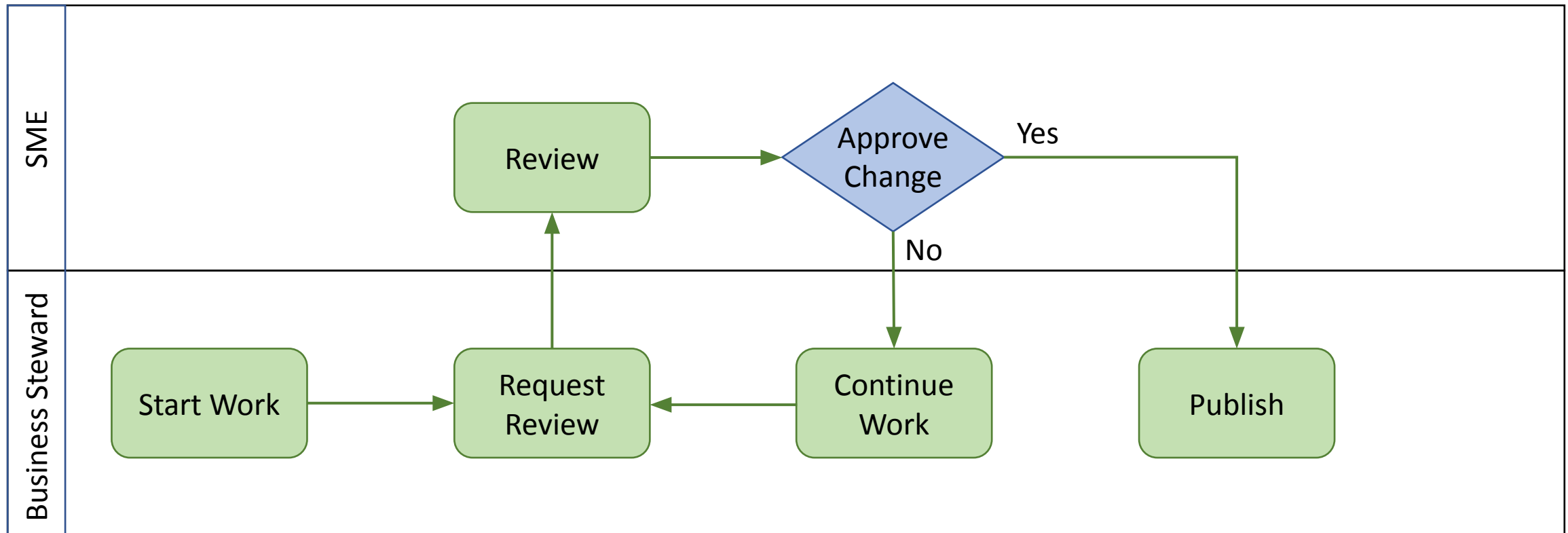
Glossary Workflow



Glossary Workflow

Swimlane Perspective

In simple cases you can convert between the two.



Creating an EDG Workflow

- What is your process?
 - is your workflow similar to a sample workflow?
(download from:
<https://archive.topquadrant.com/wp-content/uploads/2020/02/Workflows6.3.txt>)
- What are your governance roles?
 - do you need additional roles?
(see “*Custom Governance Roles*”)
- Are notifications or special processes required?

Creating a Workflow Template

Creating an EDG Workflow

- 1.** Decompose your processes into Actors, Transitions, Status, and Actions.
- 2.** Create EDG governance roles as needed for Actors (optionally disable any unused governance roles).
- 3.** Create Status entities.
- 4.** Create Transition entities, connect to Status entities and governance roles.

Creating a Workflow Template

Creating an EDG Workflow

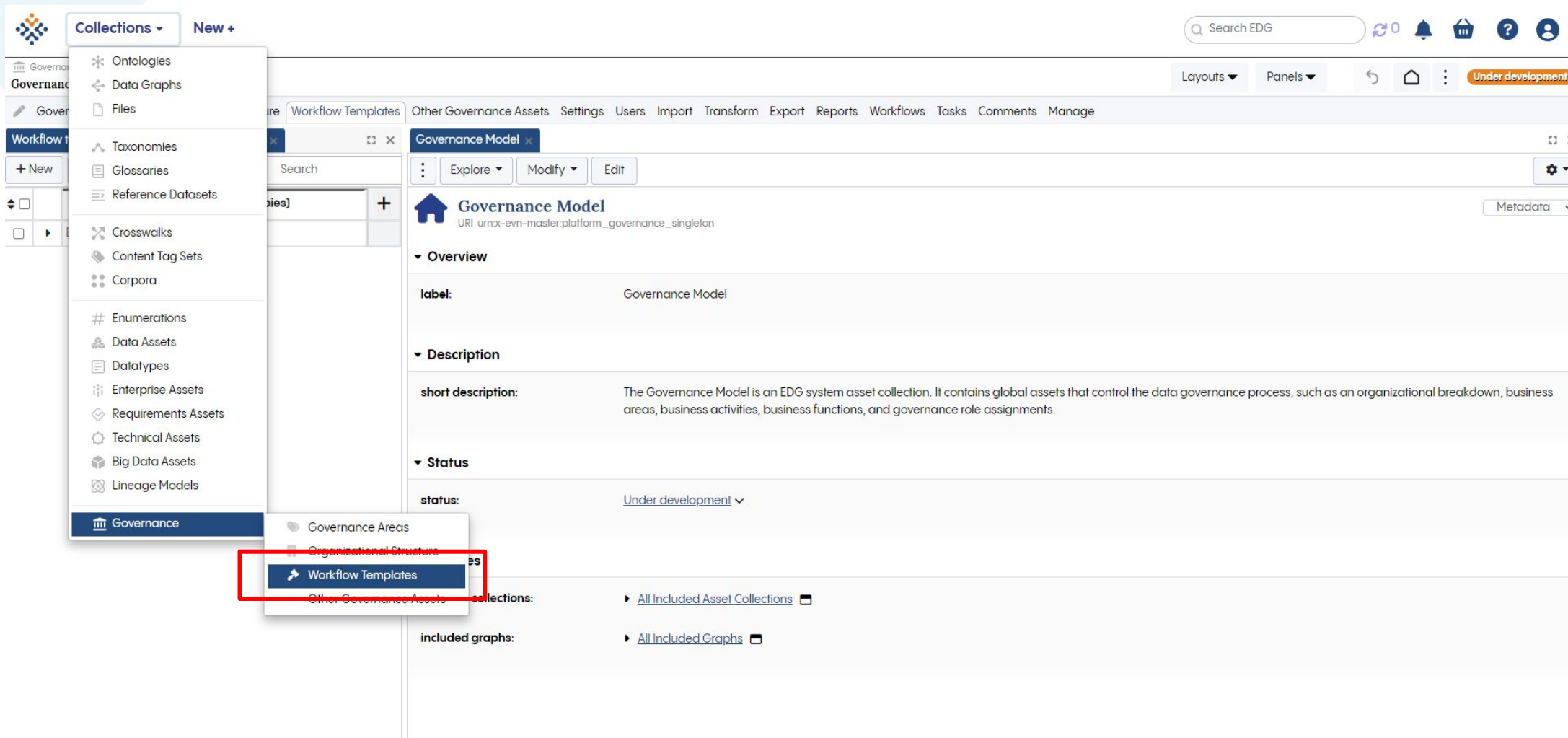
- 5.** Test and refine.
- 6.** Create Actions as needed.
- 7.** Test and refine again.

Requirements

- 1.** Will need a multi-user setup.
- 2.** Governance roles will need to be accessible to your workflows.

Creating a Workflow Template: Create a New Ontology

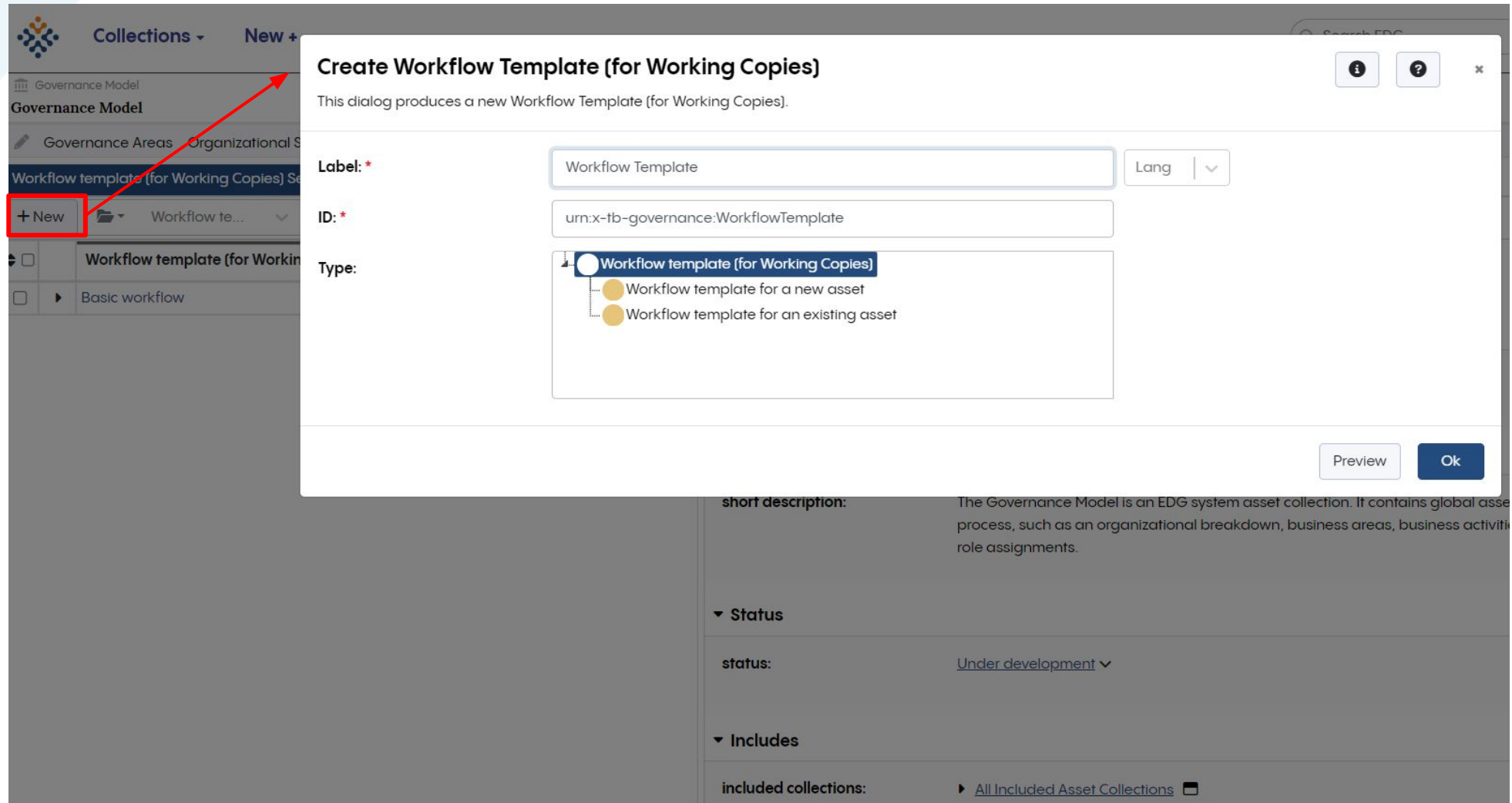
Go to **Workflow Template** in **Governance**



The screenshot displays the TopQuadrant Governance web application interface. On the left, a 'Collections' dropdown menu is open, listing various asset types such as Ontologies, Data Graphs, Files, Taxonomies, Glossaries, Reference Datasets, Crosswalks, Content Tag Sets, Corpora, Enumerations, Data Assets, Datatypes, Enterprise Assets, Requirements Assets, Technical Assets, Big Data Assets, and Lineage Models. The 'Governance' category is selected, and a sub-menu is visible with 'Workflow Templates' highlighted by a red rectangle. The main content area shows the 'Governance Model' page, which includes an overview, description, and status section. The status is currently set to 'Under development'.

Creating a Workflow Template: Create a New Ontology

Click **New** and call it “Workflow Template”



Create Workflow Template (for Working Copies)

This dialog produces a new Workflow Template (for Working Copies).

Label: * Workflow Template Lang ▾

ID: * urn:x-tb-governance:WorkflowTemplate

Type:

- Workflow template (for Working Copies)
 - Workflow template for a new asset
 - Workflow template for an existing asset

Preview Ok

short description: The Governance Model is an EDG system asset collection. It contains global asset process, such as an organizational breakdown, business areas, business activities, role assignments.

▼ Status

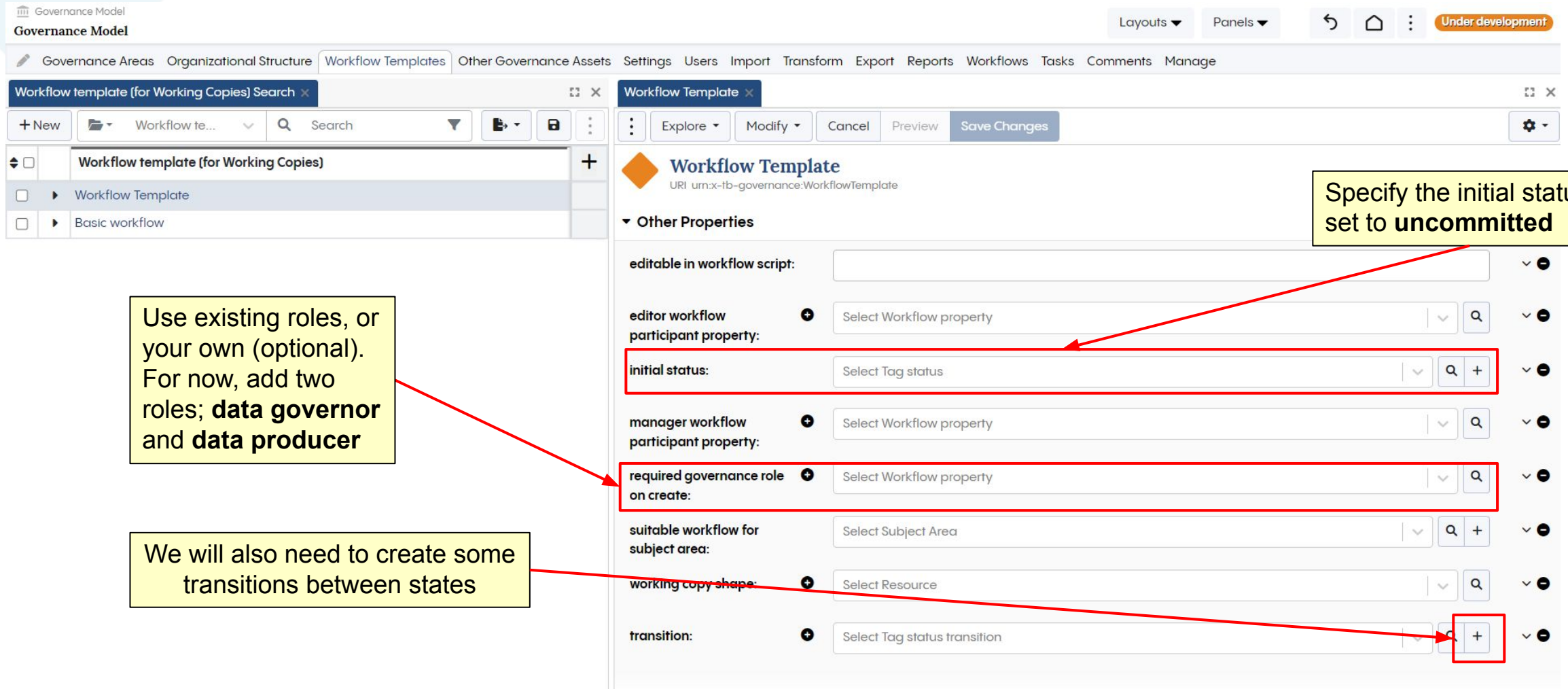
status: Under development ▾

▼ Includes

included collections: ▶ All Included Asset Collections 🗄

Creating a Workflow Template: Configure our template instance

Workflow Template



The screenshot shows the 'Workflow Template' configuration page in the TopQuadrant Governance Model. The interface includes a navigation menu at the top with options like 'Governance Areas', 'Organizational Structure', and 'Workflow Templates'. The main content area is divided into a left sidebar and a right main panel. The sidebar shows a tree view with 'Workflow template (for Working Copies)' selected. The main panel displays the configuration for a 'Workflow Template' instance, with the URI 'urn:x-ib-governance:WorkflowTemplate'. The configuration is organized into sections: 'Other Properties', 'editable in workflow script:', 'editor workflow participant property:', 'manager workflow participant property:', 'required governance role on create:', 'suitable workflow for subject area:', 'working copy shape:', and 'transition:'. Each section contains a dropdown menu and a search icon. A red box highlights the 'initial status:' dropdown, and a yellow callout box points to it with the text 'Specify the initial status, set to uncommitted'. Another red box highlights the 'required governance role on create:' dropdown, and a yellow callout box points to it with the text 'Use existing roles, or your own (optional). For now, add two roles; data governor and data producer'. A third red box highlights the 'transition:' dropdown, and a yellow callout box points to it with the text 'We will also need to create some transitions between states'. The 'transition:' dropdown also has a red box around its search icon and a plus sign button.

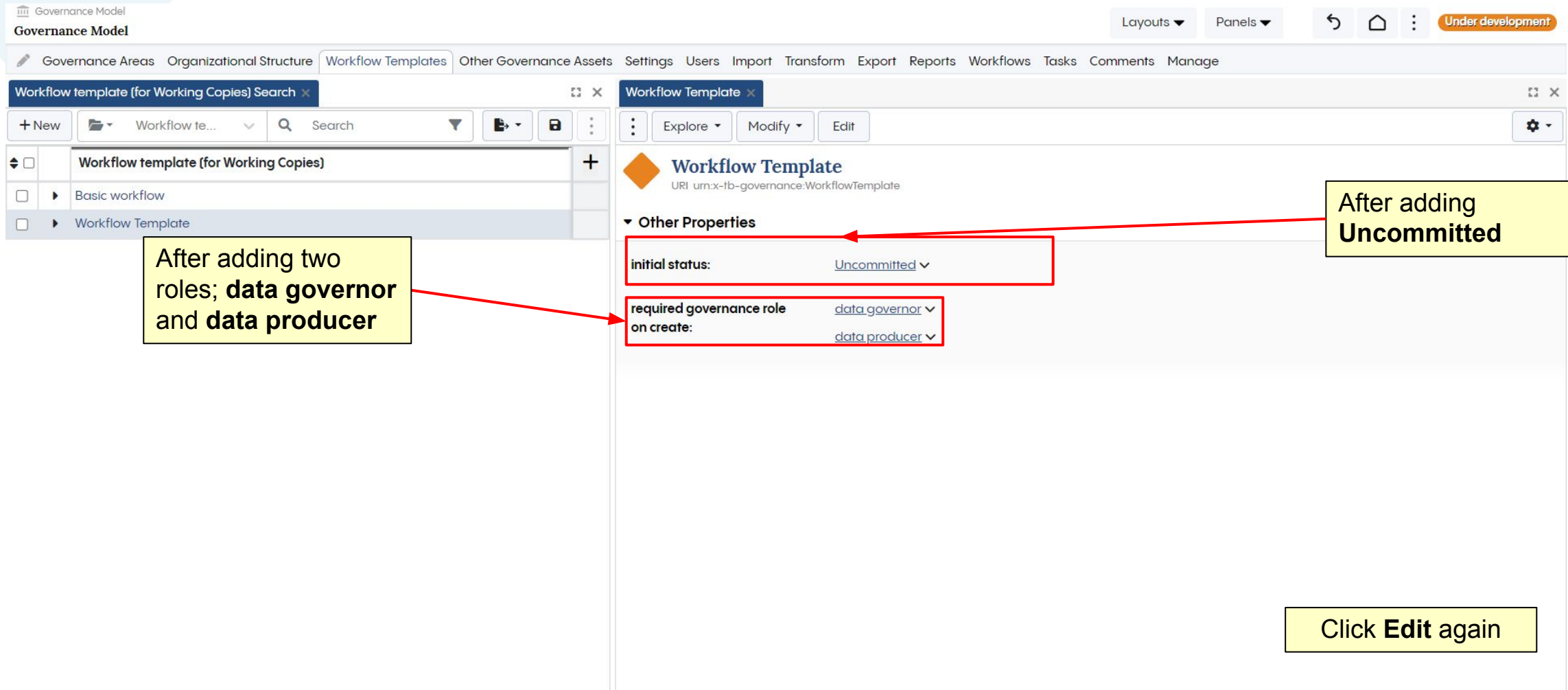
Use existing roles, or your own (optional). For now, add two roles; **data governor** and **data producer**

We will also need to create some transitions between states

Specify the initial status, set to **uncommitted**

Creating a Workflow Template: Configure our template instance

Workflow Template



The screenshot shows the 'Governance Model' interface with the 'Workflow Templates' tab selected. The left sidebar shows a tree view with 'Workflow template (for Working Copies)' expanded to show 'Basic workflow' and 'Workflow Template'. The main panel shows the configuration for the 'Workflow Template' instance. The 'Other Properties' section is expanded, showing 'initial status' set to 'Uncommitted' and 'required governance role on create' set to 'data.governor' and 'data.producer'. Red boxes highlight these two properties, with arrows pointing to callout boxes. A 'Click Edit again' callout is also present.

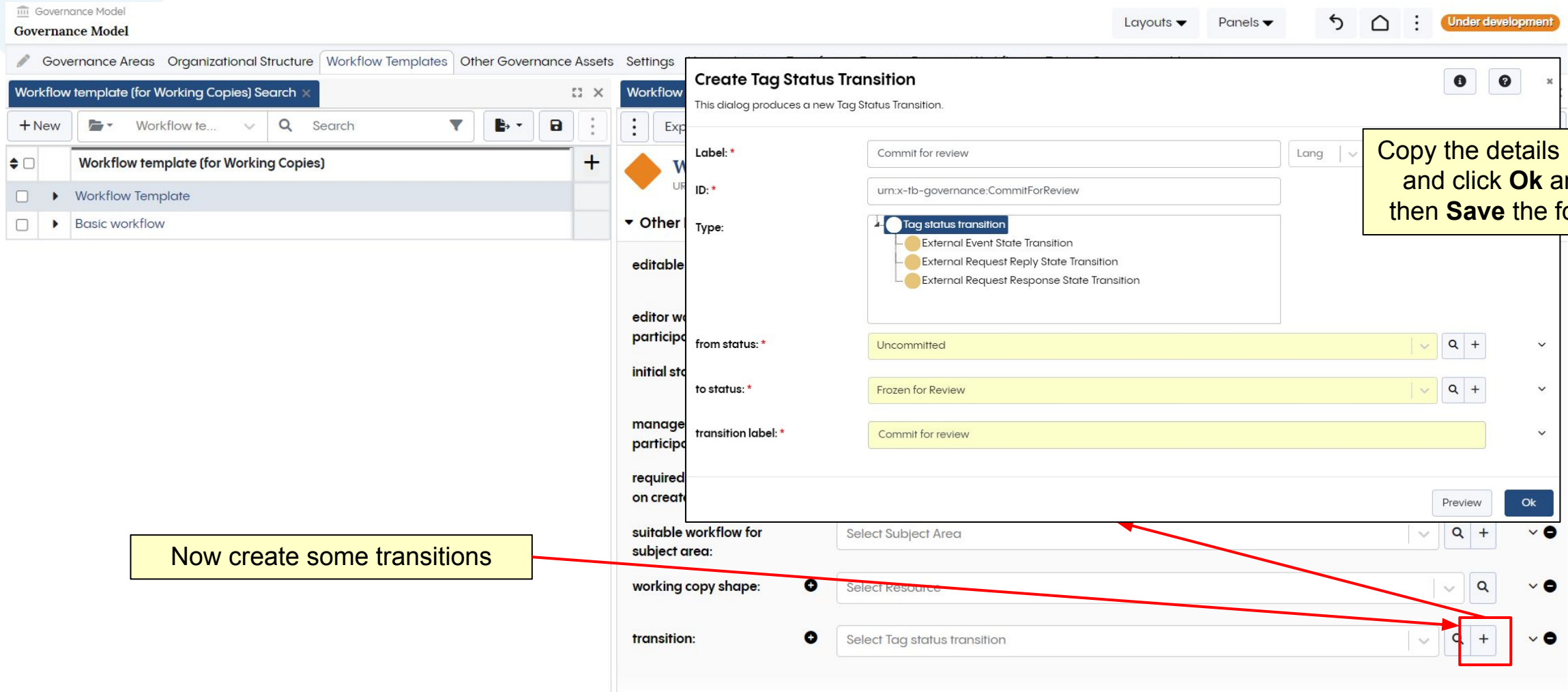
After adding two roles; data governor and data producer

After adding Uncommitted

Click Edit again

Creating a Workflow Template: Create transitions

Workflow Template



Now create some transitions

Create Tag Status Transition
This dialog produces a new Tag Status Transition.

Label: * Commit for review Lang | v

ID: * urn:x-ib-governance:CommitForReview

Type: Tag status transition
 External Event State Transition
 External Request Reply State Transition
 External Request Response State Transition

from status: * Uncommitted | v | Q + | v

to status: * Frozen for Review | v | Q + | v

transition label: * Commit for review | v

Preview Ok

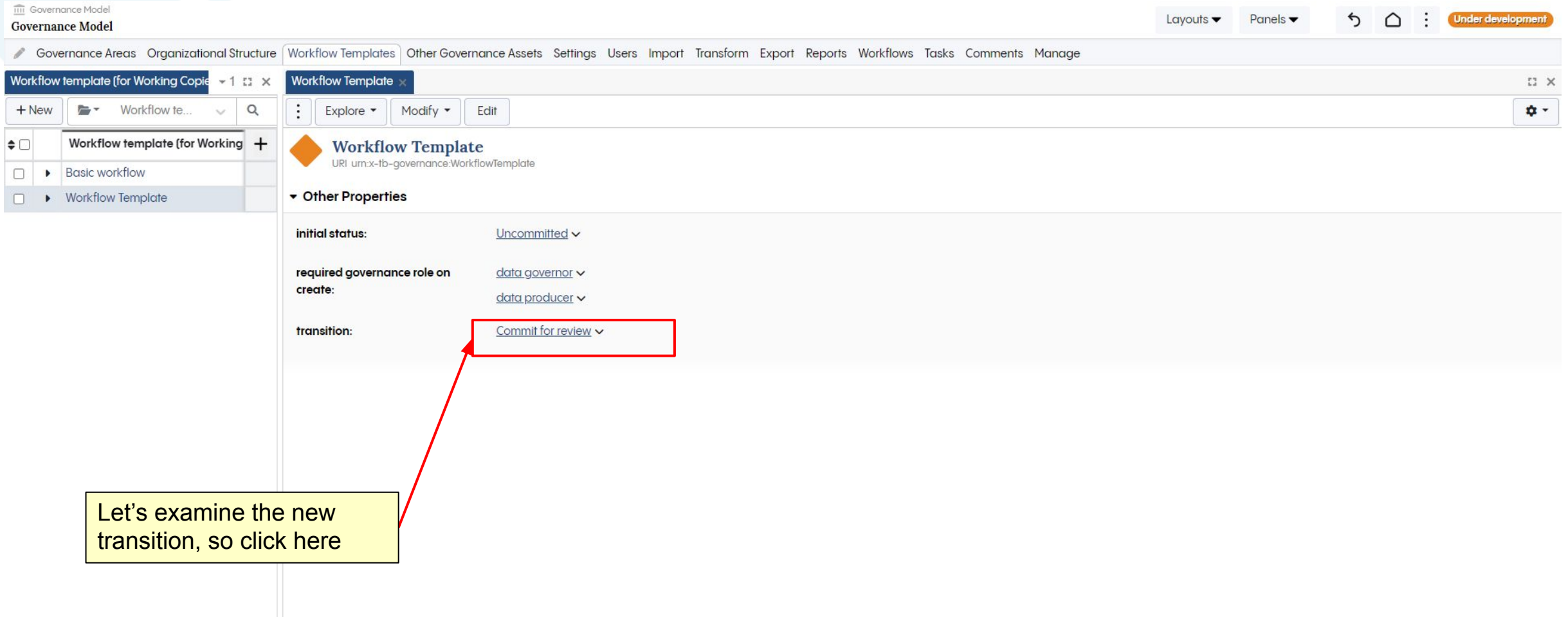
suitable workflow for subject area: Select Subject Area | v | Q + | v -

working copy shape: + Select Resource | v | Q | v -

transition: + Select Tag status transition | v | Q + | v -

Copy the details here and click **Ok and then **Save** the form**

Creating a Workflow Template: Edit transitions



The screenshot shows the TopQuadrant Governance Model interface. The main content area displays the configuration for a "Workflow Template". Under the "Other Properties" section, the "transition" dropdown menu is highlighted with a red box. A red arrow points from a yellow callout box to this dropdown menu.

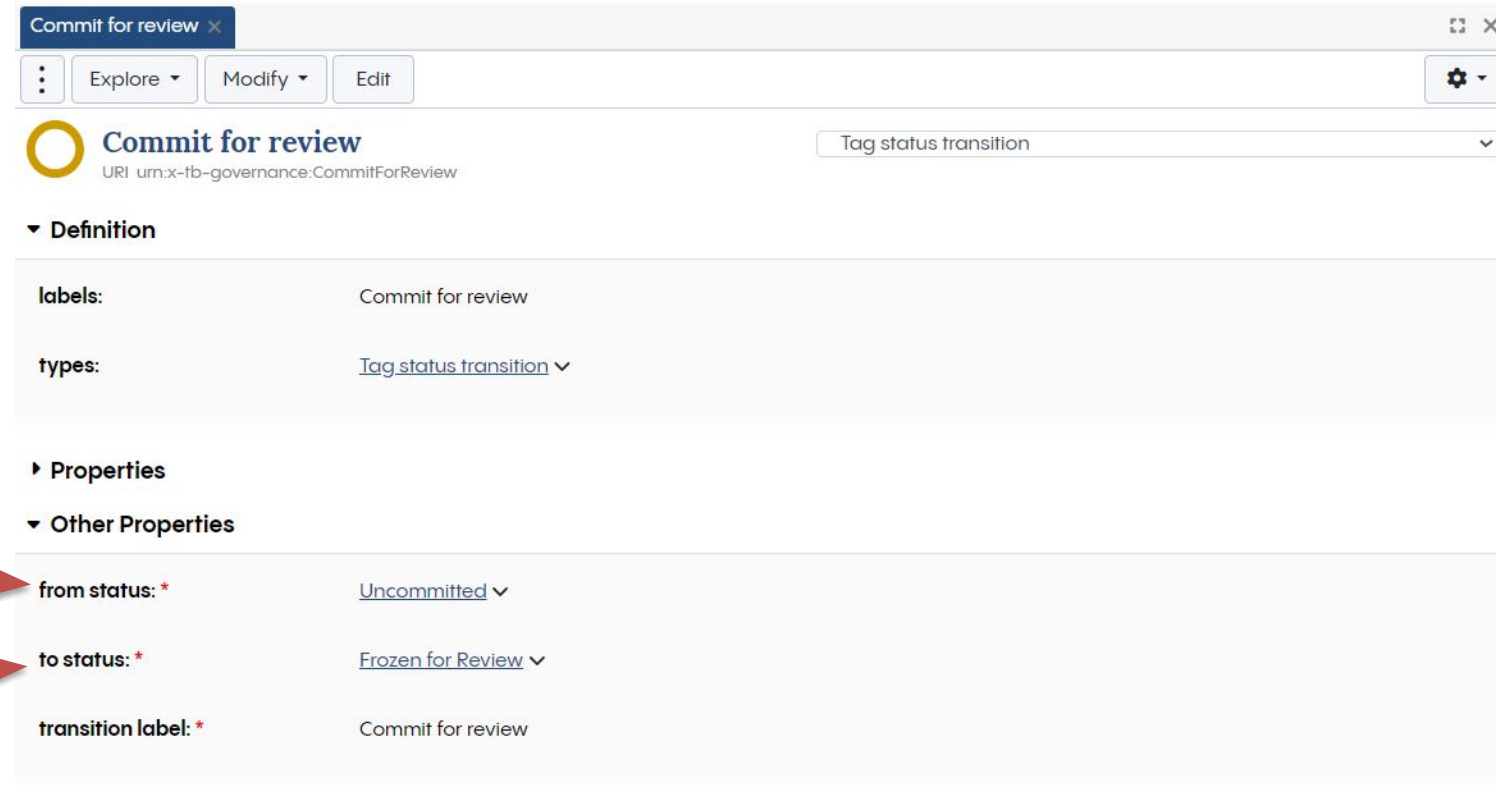
Let's examine the new transition, so click here

Creating a Workflow Template: Edit transitions

A transition defines the “from” and “to”,
restriction and actions

From Status

To Status



Commit for review x

Explore Modify Edit

Commit for review
URI urn:x-ib-governance:CommitForReview

Tag status transition

▼ Definition

labels: Commit for review

types: Tag status transition ▼

► Properties

▼ Other Properties

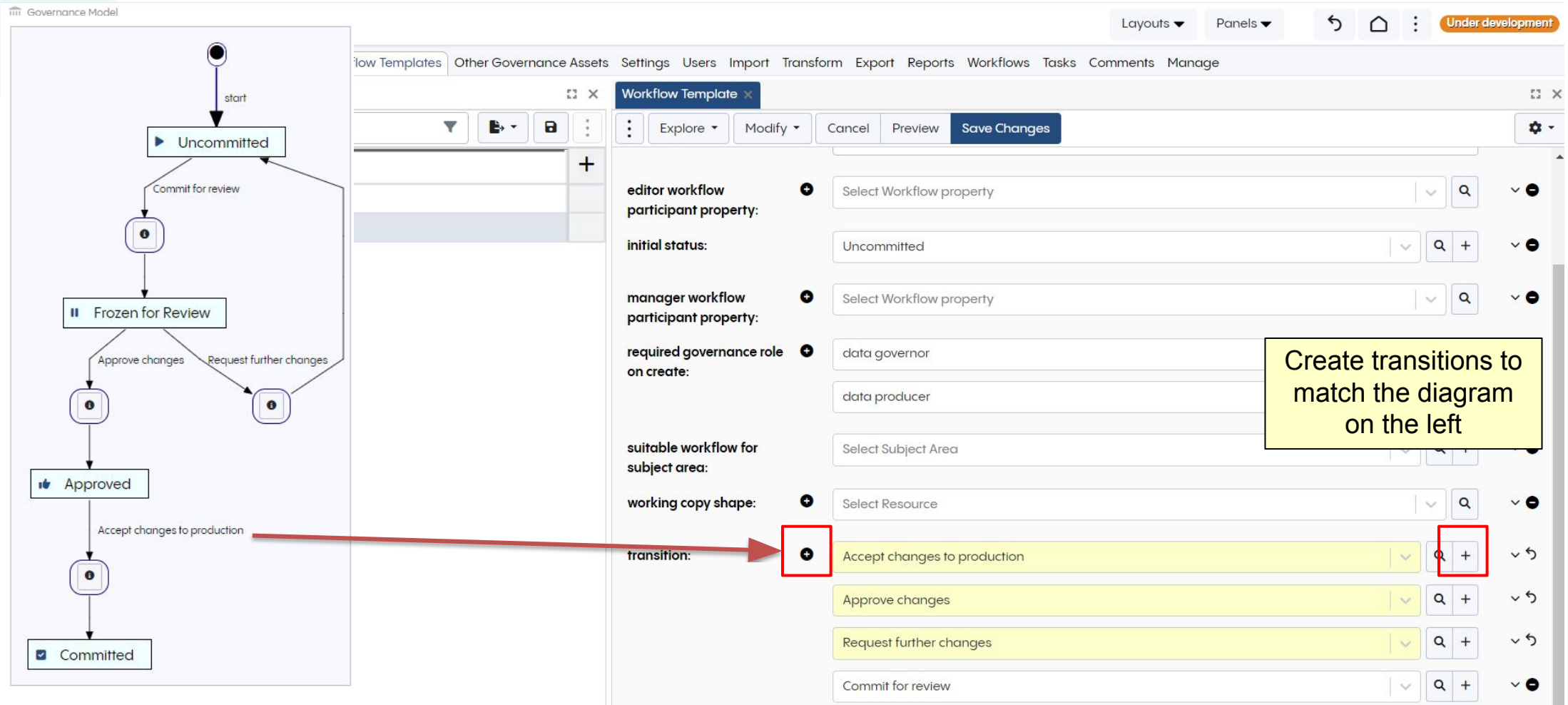
from status: * Uncommitted ▼

to status: * Frozen for Review ▼

transition label: * Commit for review

Creating a Workflow Template: Add transitions to template

Workflow Template



Workflow Template configuration panel:

- editor workflow participant property: Select Workflow property
- initial status: Uncommitted
- manager workflow participant property: Select Workflow property
- required governance role on create: data governor, data producer
- suitable workflow for subject area: Select Subject Area
- working copy shape: Select Resource
- transition: Accept changes to production, Approve changes, Request further changes, Commit for review

Diagram labels:

- start
- Uncommitted
- Commit for review
- Frozen for Review
- Approve changes
- Request further changes
- Approved
- Accept changes to production
- Committed

Callout: Create transitions to match the diagram on the left

Viewing Templates



Collections ▾

New +

Search EDG



Workflow Templates

Select Template:

▼
Basic workflow
Workflow Template

[View in Platform Governance](#)

Select the workflow template

Signed in as:

admin

☰ My Workflows

📁 Find Tasks

👤 User Directory

⚙️ Workflow Templates

🔑 Server Administration

👤 Customer Portal

Version: 8.0.0 (20240507-1314)

👤 Sign Out

You can access the "Workflow Templates" option under the user menu

Viewing Templates


Workflow Templates


Select Template: [View in Platform Governance](#)


Workflow Template Workflow Template


Diagram View

This workflow template consists of the following states:

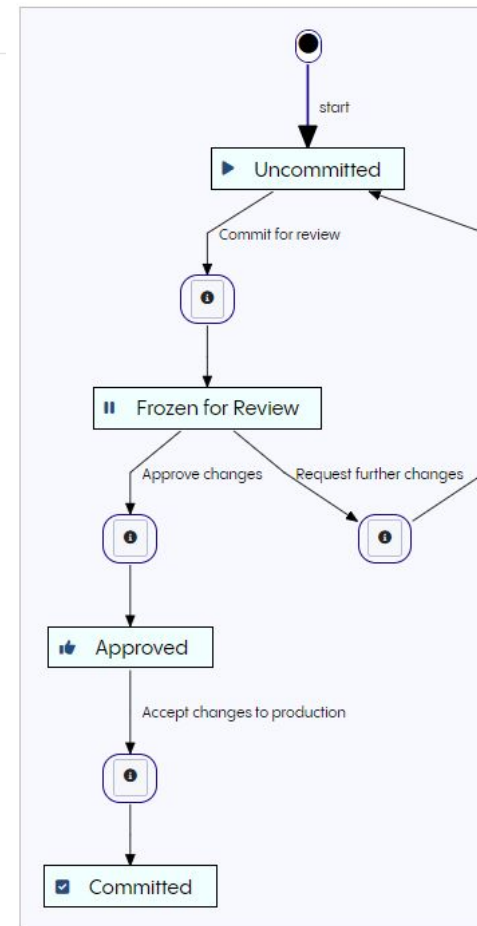
- 
Uncommitted (editable)
 This is the initial status.
 It means that changes are being made or are expected to be made. Any change created so far is "work in progress" and has not been written to the production copy.
 Possible Transitions:
 - To [Frozen for Review](#)

- 
Approved (not editable)
 It means that the changes have been approved.
 Possible Transitions:
 - To [Committed](#)

- 
Frozen for Review (not editable)
 It means that the changes are being reviewed. Edits are not permitted while in this state, but comments can still be posted.
 Possible Transitions:
 - To [Approved](#)
 - To [Uncommitted](#)

- 
Committed (not editable)
 This is a terminal status with no possible transitions into other statuses.
 It means that the changes have been written to the production copy and no further edits are possible.

Your template should look like this, and if you select diagram, this should reflect the transitions you have added



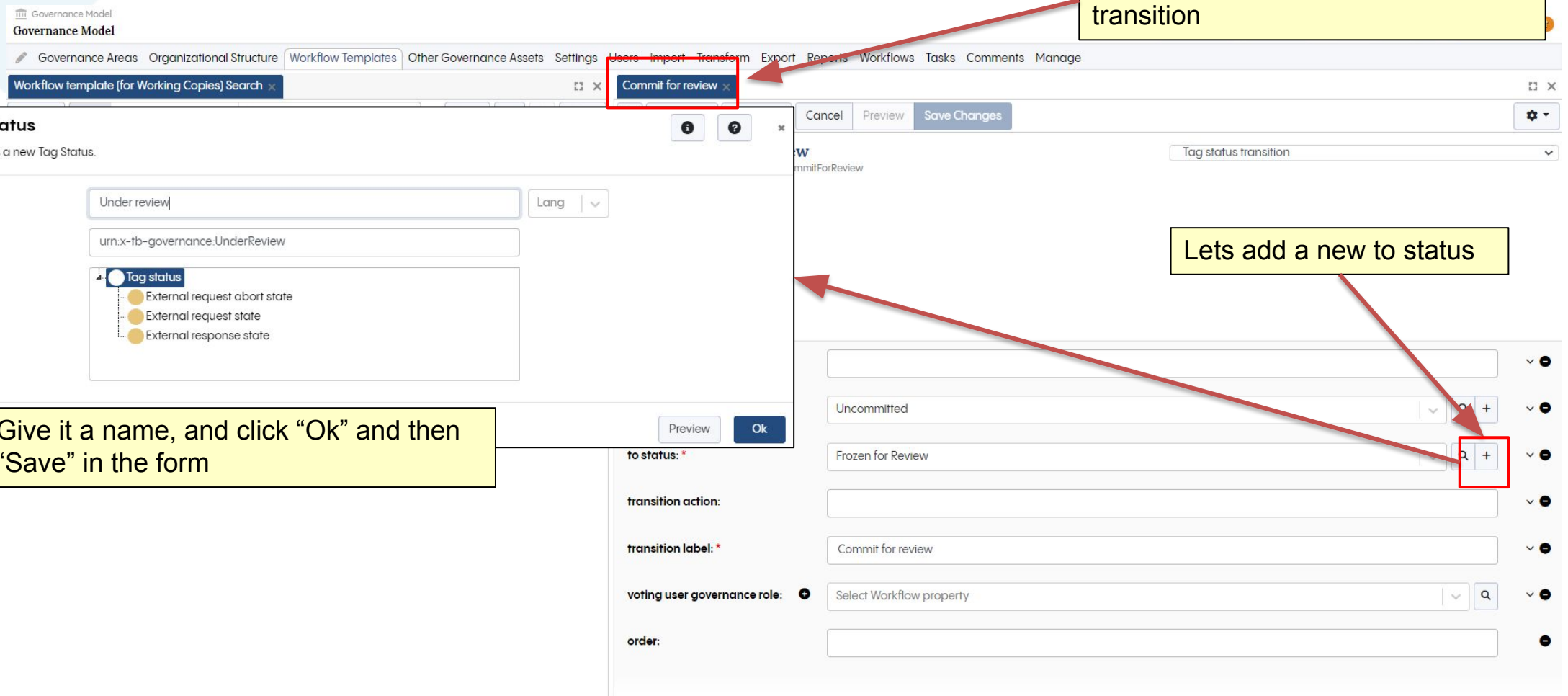
Creating a Workflow Template: Create a Tag status

Workflow Status

Navigate to the “Commit for review” transition

Lets add a new to status

Give it a name, and click “Ok” and then “Save” in the form



The screenshot displays the software interface for creating a workflow template. The main window shows the 'Commit for review' transition configuration. A 'Create Tag Status' dialog box is open, allowing the user to define a new tag status. The dialog includes fields for 'Label' (set to 'Under review'), 'ID' (set to 'urn:x-tb-governance:UnderReview'), and 'Type' (set to 'Tag status'). Below the 'Type' field, there are three options: 'External request abort state', 'External request state', and 'External response state'. The 'Ok' button is highlighted. In the background, the 'Commit for review' transition configuration is visible, with a red box around the 'Add' button next to the 'to status' field. The 'to status' field is currently empty, and the 'transition label' is set to 'Commit for review'. The 'voting user governance role' is set to 'Select Workflow property'.

Creating a Workflow Template: Tag status

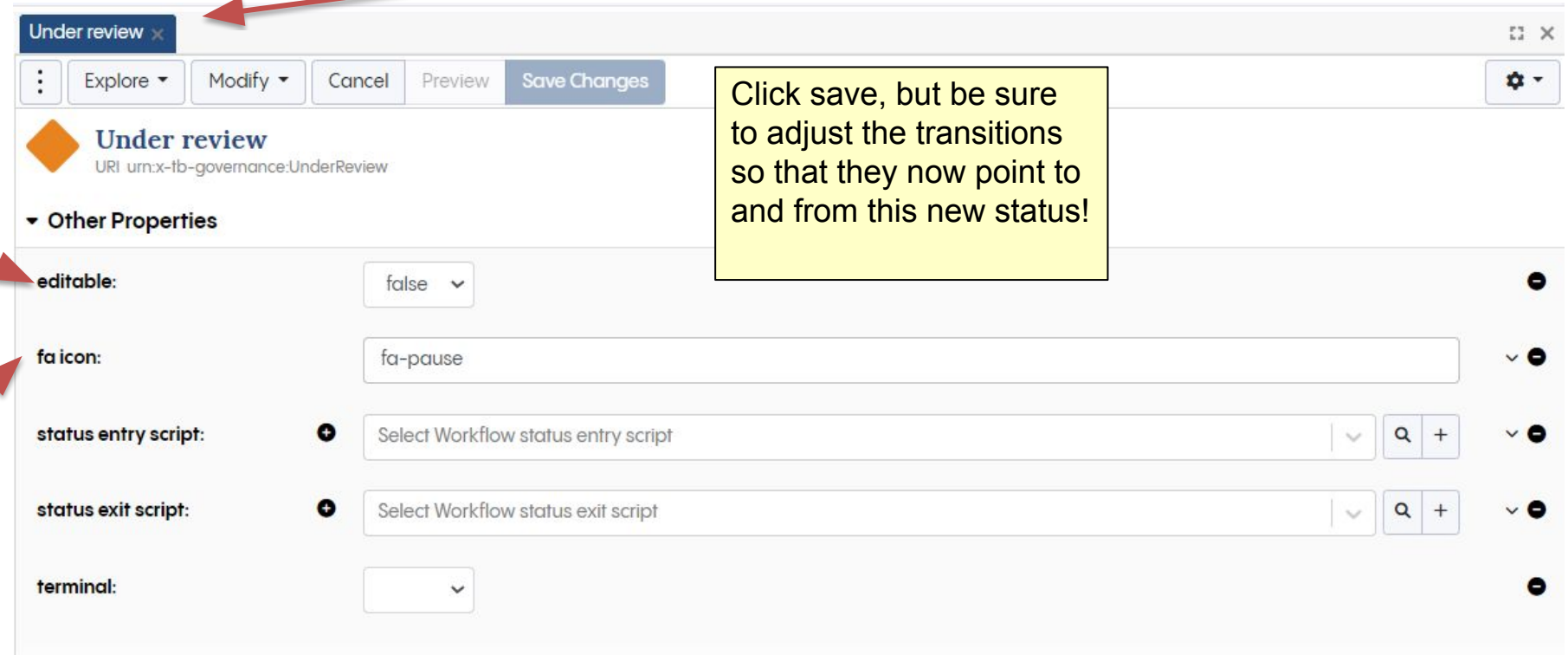
Workflow Status

The “Under review” status.

The **editable** field can make the workflow content “read only” while under the status.

Click save, but be sure to adjust the transitions so that they now point to and from this new status!

Optional icon from the “Font Awesome” library.



Visit Font Awesome for available icons: <https://fontawesome.com/icons/>

Creating a Workflow Template: Restricting transitions

Workflow Status

Make it so only those with data governor role can approve changes

```
Approve changes Source Code of Approve changes x
Cancel Save Changes
> @prefix afn: <http://jena.hpl.hp.com/ARQ/function#> . ...
<urn:x-tb-governance:ApproveChanges>
  a teamwork:TagStatusTransition ;
  teamwork:fromStatus <urn:x-tb-governance:UnderReview> ;
  teamwork:toStatus teamwork:Approved ;
  teamwork:transitionLabel "Approve changes" ;
  rdfs:label "Approve changes" ;
```

```
<urn:x-tb-governance:ApproveChanges>
  a teamwork:TagStatusTransition ;
  teamwork:fromStatus <urn:x-tb-governance:UnderReview> ;
  teamwork:toStatus teamwork:Approved ;
  teamwork:transitionLabel "Approve changes" ;
  rdfs:label "Approve changes" ;
  teamwork:requiredGovernanceRole edg:dataGovernor ;
```

```
Commit for review Source Code of Commit for review x
Cancel Save Changes
> @prefix afn: <http://jena.hpl.hp.com/ARQ/function#> . ...
<urn:x-tb-governance:CommitForReview>
  a teamwork:TagStatusTransition ;
  teamwork:fromStatus teamwork:Uncommitted ;
  teamwork:toStatus <urn:x-tb-governance:UnderReview> ;
  teamwork:transitionLabel "Commit for review" ;
  rdfs:label "Commit for review" ;
```

Make it so only workflows with changes can be submitted for review

```
<urn:x-tb-governance:CommitForReview>
  a teamwork:TagStatusTransition ;
  teamwork:fromStatus teamwork:Uncommitted ;
  teamwork:toStatus <urn:x-tb-governance:UnderReview> ;
  teamwork:transitionLabel "Commit for review" ;
  rdfs:label "Commit for review" ;
  teamwork:requiresChanges true ;
```

Viewing Template

Workflow Templates

Select Template: [View in Platform Governance](#)

Workflow Template Workflow Template

Diagram View

This workflow template consists of the following states:

- Uncommitted (editable)**
 This is the initial status.
 It means that changes are being made or are expected to be made. Any change created so far is "work in progress" and has not been written to the production copy.
 Possible Transitions:
 - To Under review if the following conditions are satisfied:
 - Working copy requires changes: true

- Approved (not editable)**
 It means that the changes have been approved.
 Possible Transitions:
 - To Committed

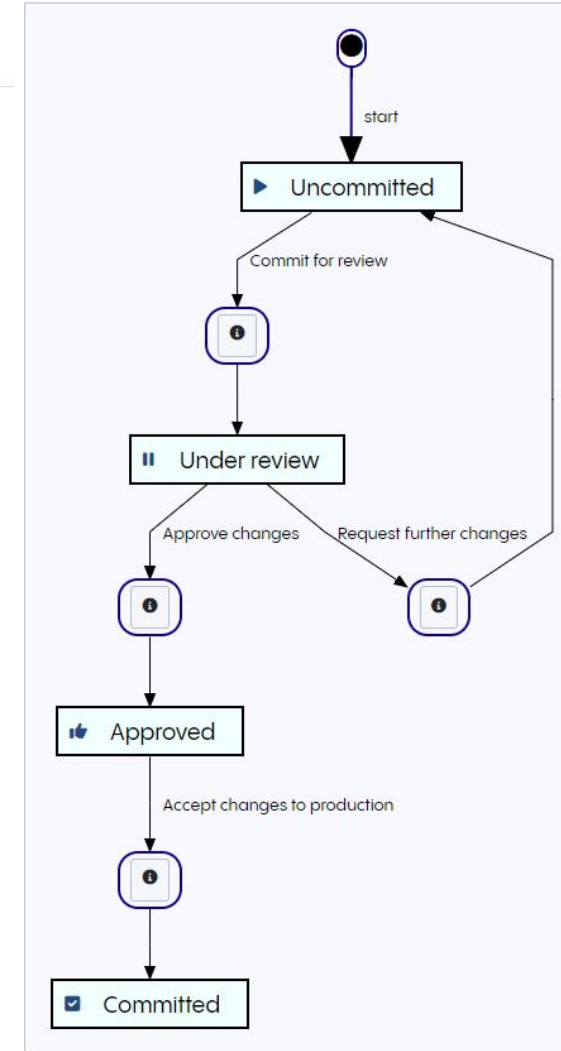
- Under review (not editable)**
 Possible Transitions:
 - To Approved if the following conditions are satisfied:
 - Required governance role: data governor
 - To Uncommitted

- Committed (not editable)**
 This is a terminal status with no possible transitions into other statuses.
 It means that the changes have been written to the production copy and no further edits are possible.

Your template should look like this, and if you select diagram, this should reflect the tag status you have added and the new restrictions.

Transition restriction: change

Transition restriction: governance role



Status Change Events

What is an Event?

- Event is any change in data.
 - data edits (additions and deletions), workflow status change, etc.
- EDG will watch for changes, and executes rules.
- It's up to the rule to determine if the change is significant by checking that it meets certain conditions, if so, the rule executes an action.

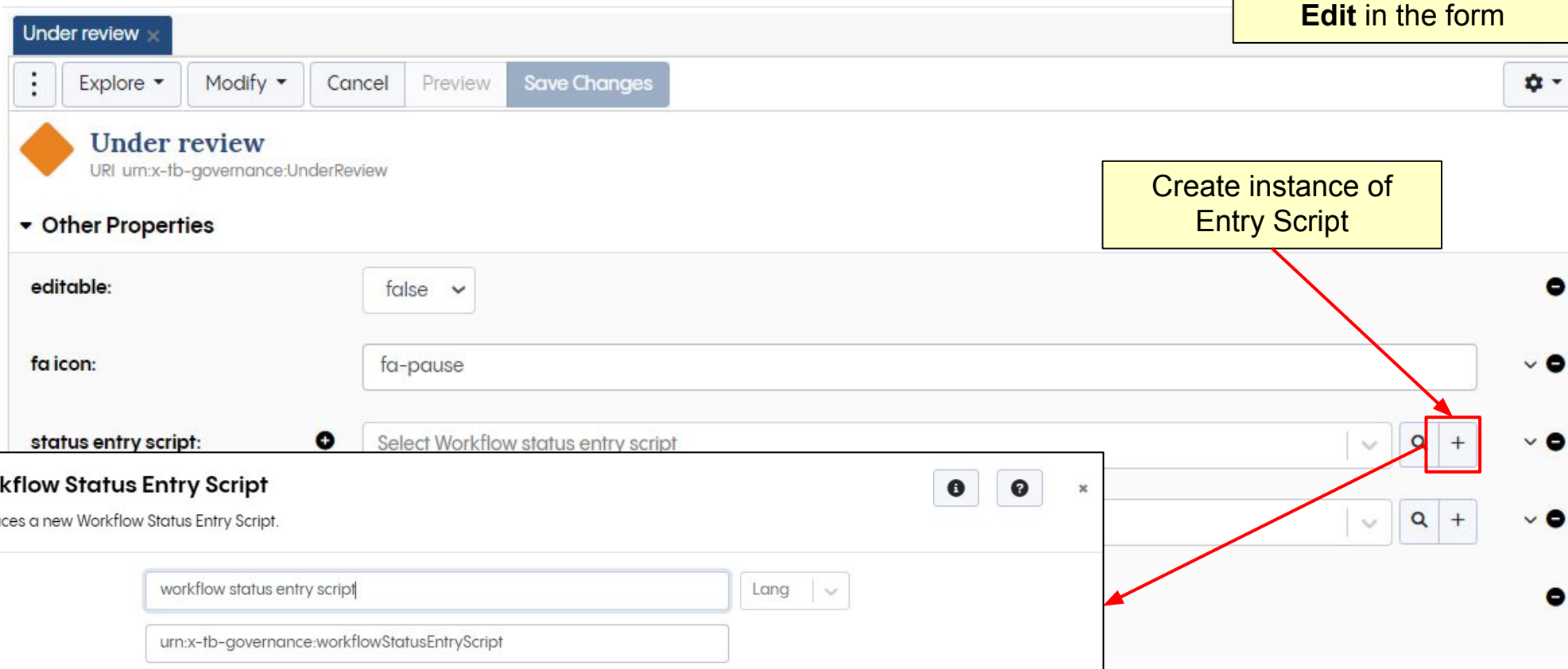
What is an Action?

- Anything you program, requires writing ADS (or SWP) scripts.
- EDG will execute an action specified for an event when it detects that the event happened.

Event-Condition-Action: Add a status script

Workflow Status Entry Script

Return to the “Under review” tag and click **Edit** in the form



The screenshot shows the configuration page for the 'Under review' workflow. The 'status entry script' field is currently empty and has a '+' icon to its right. A yellow callout box labeled 'Create instance of Entry Script' has a red arrow pointing to the '+' icon. Another red arrow points from the '+' icon to a dialog box titled 'Create Workflow Status Entry Script'. The dialog box contains the following fields:

- Label:** workflow status entry script
- Lang:** (dropdown menu)
- ID:** urn:x-tb-governance:workflowStatusEntryScript

Buttons for 'Preview' and 'Ok' are visible at the bottom of the dialog box.

Event-Condition-Action: Add a status script change

Workflow Templates Other Governance Assets Settings Users Import Transform Export Reports Workflows Tasks Comments Manage

workflow status entry script

Explore Modify Cancel Preview Save Changes

workflow status entry script
URI urn:x-tb-governance:workflowStatusEntryScript

▼ Definition

labels: + workflow status entry script

comments: +

▼ Implementation

JavaScript code:

```
graph.update(`
INSERT {
  <http://example/log>
  <http://example/preInProgressOneTimestamp> ?ts ;
  <http://example/preInProgressOne> "Completed Enter Script" ;
  .
} WHERE {
  BIND(NOW() AS ?ts) .
}`)
```


```
graph.update(`
INSERT {
  <http://example/log>
  <http://example/preInProgressOneTimestamp> ?ts ;
  <http://example/preInProgressOne> "Completed Enter Script" ;
  .
} WHERE {
  BIND(NOW() AS ?ts) .
}`)
```

Repeat for workflow status exit script, but replace the string "Complete Enter Script" with "Completed Exit Script"

Event-Condition-Action: Add a status script change

Under review ×

⋮ Explore ▾ Modify ▾ Edit

 **Under review**
URI um:x-tb-governance:UnderReview

▼ Other Properties

editable:	false
fa icon:	fa-pause
status entry script:	workflow status entry script ▾
status exit script:	workflow status exit script ▾

How it should look

Viewing Template

Workflow Template Workflow Template

Diagram View

This workflow template consists of the following states:



Uncommitted (editable)

This is the initial status.

It means that changes are being made or are expected to be made. Any change created so far is "work in progress" and has not been written to the production copy.

Possible Transitions:

- To [Under review](#) if the following conditions are satisfied:
 - Working copy requires changes: true



Approved (not editable)

It means that the changes have been approved.

Possible Transitions:

- To [Committed](#)



Under review (not editable)

Entry Scripts

- workflow status entry script

Exit Scripts

- workflow status exit script

Possible Transitions:

- To [Approved](#) if the following conditions are satisfied:
 - Required governance role: data governor
- To [Uncommitted](#)



Committed (not editable)

This is a terminal status with no possible transitions into other statuses.

It means that the changes have been written to the production copy and no further edits are possible.

Status scripts: entry and exit

What we covered

- What is a Workflow?
- Overview of existing workflows
- Creating a Workflow Template
- Status Change Events