

How to Perform Workflow Tasks in Bulk

Workflow Wednesday Series #6

December 5 2018

Logistics

- 1st half of session is presentation and will be recorded
- 2nd half of session is discussion and will not be recorded
- You will receive the link to the recording tomorrow
- If question or comment put in the chat / question box

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Pragmatic Data Governance Series

#1 Just in Time Data Governance (6/22/17)

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#2 Data Governance on a Dime (6/8/17)

[To View](#)

#3 Clear Path from Question to Answer (3/16/17)

Recent Posts

[Quick Summary of What is Data Governance and Key Best Practices](#)

[Higher Education Data Governance Related Webinars for November](#)

[Webinar Schedule for Data Governance Series Announced](#)

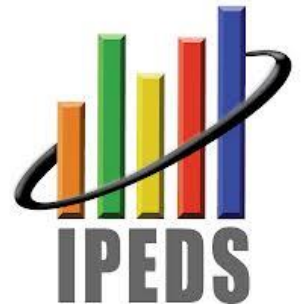
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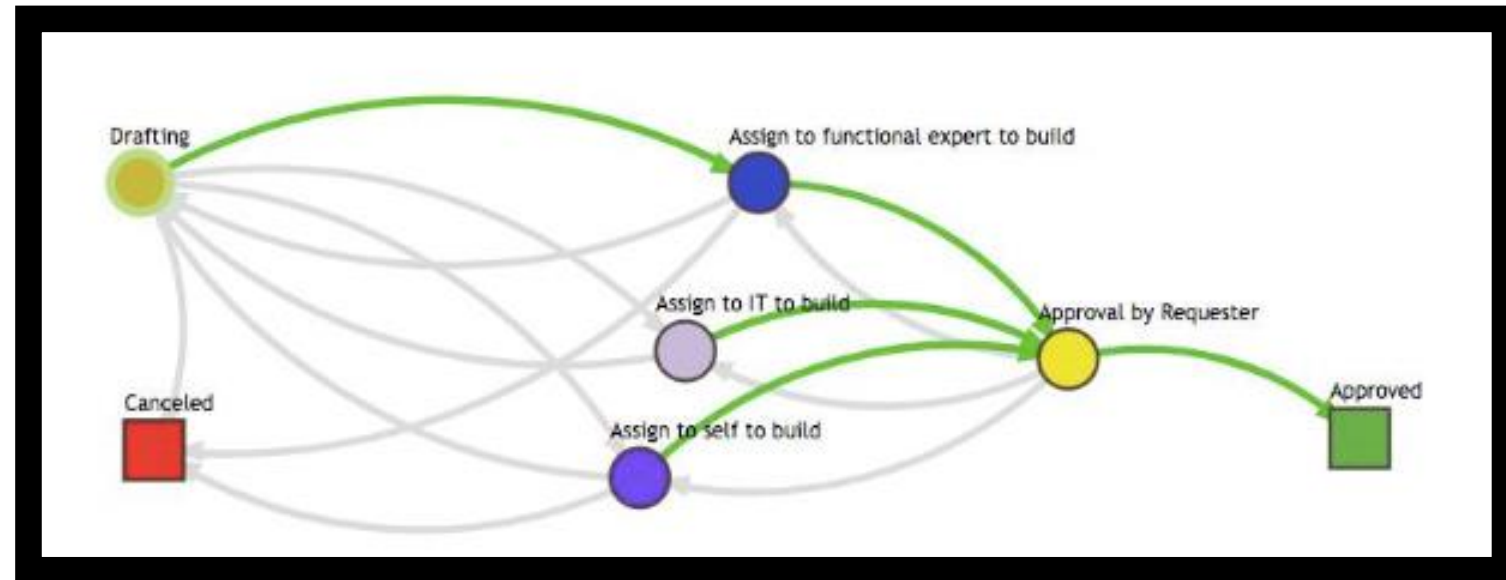
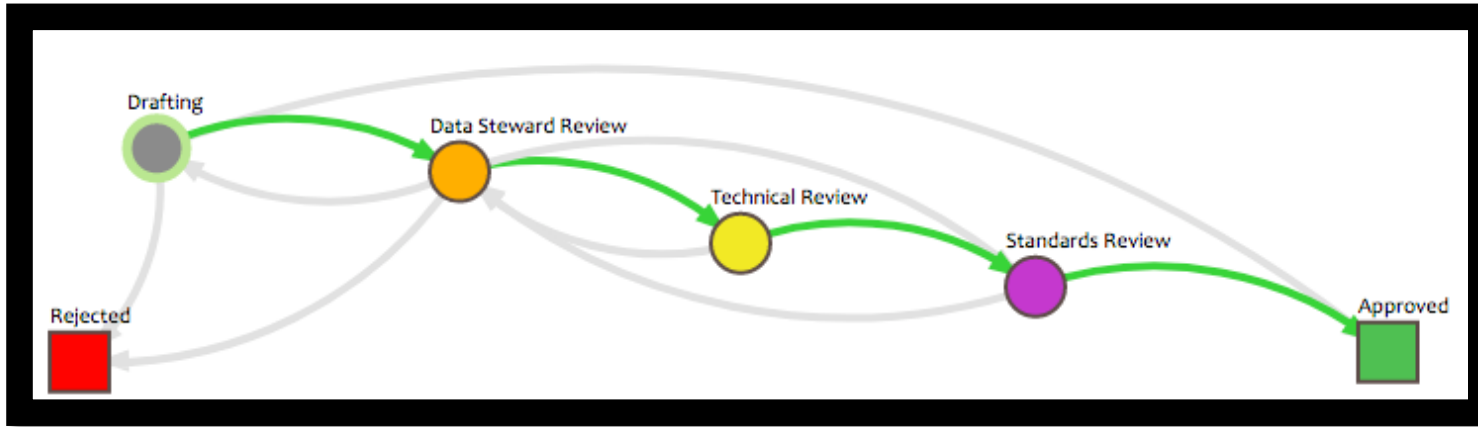
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Goals

1. Review workflow features
2. Learn how to use the Approval Queue feature to progress items along a workflow in bulk.
3. Understand Use Cases for Approval Queue

Quick Workflow Review



Transition Actions

***Functional areas** ⓘ

Type or Select... ▾

Workflow: [Definition Approval with Technical Review](#)

Save **Submit** or [Cancel](#)

Home **Definitions** Specifications Quality Data Systems Organization Community

DEFINITION

Academic Advisor

Review Version 1 ⚠️¹ [Show workflow](#) **Approve** **Other Actions** ▾

Edit

Functional Definition: ⓘ

The person who provides academic advising to a [student](#) in a formally acknowledged relationship.

FUNCTIONAL AREAS ⓘ

- Enrollment

WORKFLOW ⓘ

- Definition Approval

MODERATORS ⓘ

Comment (0 comments)

★ On my watch list

Back to drafting

Reject

Definition Approval with Technical Review

[Back to All Workflows](#)
[Active Objects \(0\)](#)

Type: Definition Approval | Status: **active** | Version: 1

[Copy](#) [Print](#)

Stage: ⓘ

Name	Initial Stage	Default Next Stage (Happy Path)	Count of active objects
Drafting	✓	Data Steward Review	Active Objects (0)

Steps ⓘ

Name	Description	Required	Generate Task Items	Users required to act	Allowable Actions	Timeout	Stage Transition Actions	Conditions	Assignments
Edit draft	As the creator of this definition, please complete the content of the definition and then submit it to the moderator for review. You can invite additional collaborators as needed.	no	yes	any	Edit Collaborate	0	Reject Submit		Version Creator conditions
Edit Draft as a Moderator	As a moderator of the functional area, you are able to edit existing drafts of any definition.	no	no	any	Edit	0	Approve Reject Submit		Data Stewards by Functional Area conditions

Transition Actions

Workflows

Workflow Definition Type:

Definition Approval ▾

Definition Approval for HR

Order: 1

Type: Definition Approval | Status: **active** | Version: 1

This is for HR Definitions to provide additional review for risk mitigation.

STAGES:

Drafting, Data Steward Review, HR Security Review

CONDITIONS:

Functional Area is Human Resources

Definition Approval with Technical Review

Order: 2

Type: Definition Approval | Status: **active** | Version: 1

This workflow separates functional and technical review.

STAGES:

Drafting, Data Steward Review, Technical Review

CONDITIONS:

Definition Approval

Order: 3

Type: Definition Approval | Status: **active** | Version: 1

This is the default workflow for definition approval.

In the drafting stage, the initial creator is tasked with editing the draft and preparing it for a moderator. They

[can also invite additional collaborators as needed. The moderator is also allowed to edit drafts in this stage, but is](#)



STAGES:

Drafting, Review

CONDITIONS:

Workflow lists

Demo! How to use Approval Queues

- Report Writer Jill has several definitions in Drafting and she wants to submit them to Data Stewards
 - Filter to 118 defs move from draft to submit; 73 in Enrollment
 - Background Job page flags Batch Actions
- Data Steward Reggie Stration wants to bulk approve 4 quality rules
 - Uses Filters
 - Approves

Watch out!

- Permissions hold true but it does not prompt early if you select wrong transition action
 - UI indicates you can select transition actions that you really cannot; all transition actions are viewed, not just yours
- Be familiar with your workflow catalog, including *workflow* versions
- Workflow naming conventions can help

Definition Approval Queue

Filter by:

Definition Approval

-- Functional Area --

Hide closed objects

Available for action by

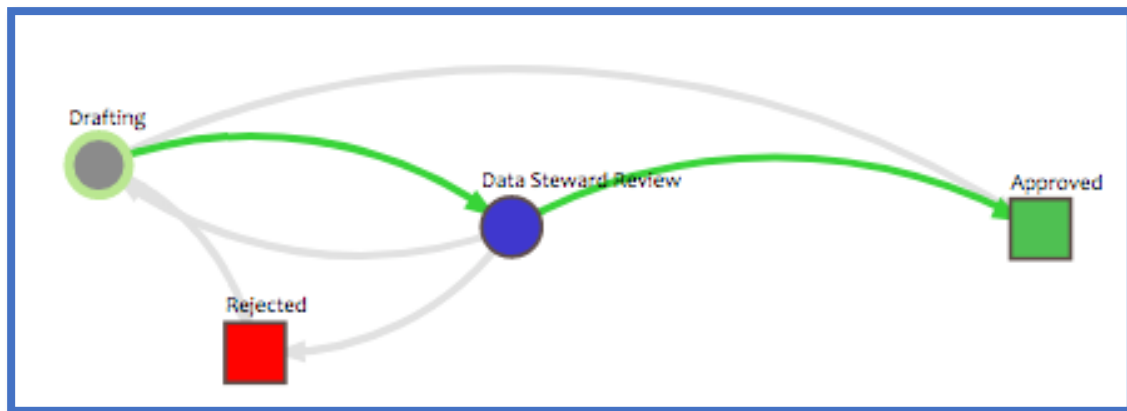
-- Workflow definition --

- Definition Approval for HR :2
- Definition Approval with Technical Review:1
- Definition Approval for HR :1
- Definition Approval:1

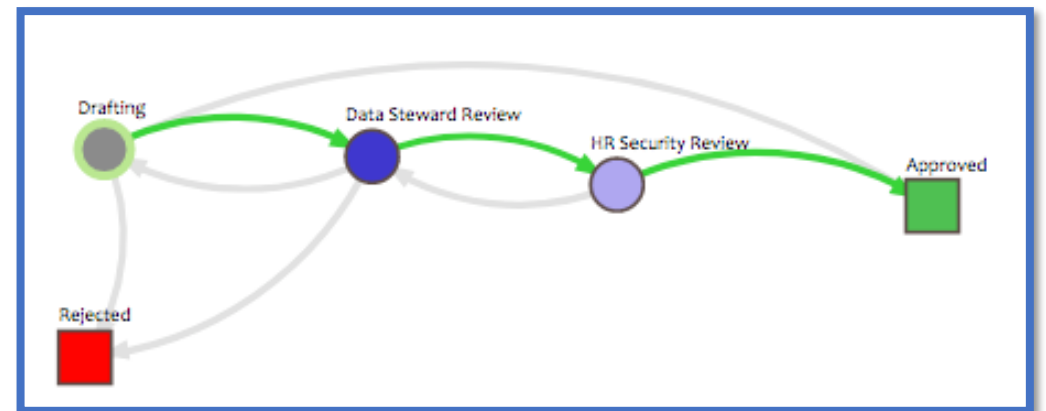
-- Actions --

-- Classification --

Definition Approval for HR: 2



Definition Approval for HR: 1



Review the Steps

1. Manipulate top row filters
2. Select items
3. Take action
4. Confirm results

Why use?

1. Report writers create new definitions during Specification documentation and can't easily Submit from Spec Template view
2. Made bulk edit in multiple definitions and want to bulk progress to next Stage
3. Save time in F2F governance/approval meetings. Take bulk actions after the meeting ends
4. Override due to unexpected absence
5. Convenient! Supports personal work style

Use Case part 2

Manage Content – Manager or Steward

- Monitor progress speed
- Re-assign objects

Next up in the Workshop Series

January 16

All about Tags, Synonyms, and Attachments

February 6

How to Migrate to a New Workflow

Get Help and Thank you!



- Pop Up Help within Data Cookbook (triangle in lower right corner)
- Ask clients – Post to *Questions and Support* in the Forum
- Ask IData Staff – support@datacookbook.com
- Visit <http://support.datacookbook.com>
- Visit **Help** link within Data Cookbook
 - Administrators Guide (check for updates)
 - User Guide (ditto)

Extra slides