Trusted Business Reporting Packaged Solution V 1.0

Release Notes

Version: 1.0

Table of Contents

1.Introduction

The purpose of this document is to capture the technical details of the trusted business reporting solution V 1.0

Document History

Version	Date	Author	Changes
1.0	25 July, 2022	Simla Sivanandan	Initial Version

2.Solution Overview

The Collibra Data Intelligence Cloud enables trusted decision-making by enabling the certification of key **reports**, datasets and **metrics**. The aim of certification is to instill greater confidence in your data-driven decisions and improve productivity for knowledge workers, managers, report developers and data governance professionals.

Our recommended approach

We recommend the following approach as a starting point for new implementations. With some experience, you can extend and expand on this approach, to suit your needs.

1. Prioritize the reports you want to certify. Start with a small set of reports. Choose an organizational or data domain where the impact will be greatest in terms of reducing wasted time or increasing confidence in the work.
2. Connect your reports and data sources.
3. Leverage the benefits of a diagram, to help those who are attempting to certify reports to visualize the lineage, meaning the relations between your data sources and your reports.
4. Leverage the power of a workflow, as an automated process that provides answers to the following questions:
    ○ How does a user request certification of a report?
    ○ How and to whom is a request routed?
    ○ What tasks are required of owners and stewards to certify a report?
    ○ How are the different certification levels defined?
5. Establish a dashboard to use as a hub from which to monitor your certification efforts, find reports across all levels of certification, and enhance usability and adoption.
6. Implement adoption plans. Communicate with all the relevant stakeholders about the solution you have put in place, their roles and the benefits and value they can expect to gain.
7. Think about how to expand. Identify the next organizational or data domain to address and the next set of reports to certify.

Methodology

To ensure we apply the certification requirements consistently, we have used the status of an asset to determine the certification level. It is important to note that, while the status needs to be created and available in Collibra, they should not be assigned to the asset types explicitly. This prevents manual overrides to the certification process.

Determine what needs to be certified:

This solution comes with workflows to certify reports, datasets and metrics. Using the configuration options, determine which asset types should be applicable for each

workflow. You may choose one report asset type (such as Tableau Workbook, Looker Dashboard etc.) or all of them. Review the configuration steps in detail, to adjust the workflow parameters to customize.

Determine certification levels:

We recommend three levels: Bronze, Silver and Gold. In our approach we have thought of the three levels as Bronze represents what we need, Silver is what we want, and Gold is what we strive for. For each asset type, this means different things. The below certification criteria are the defaults included with the marketplace download, and we encourage you to adapt them to suit your organization's needs.

Note   The certification workflows were designed and built using the latest beta version of the Collibra Workflow Designer. As a result, these workflows are not compatible with Eclipse. The workflows can still be run in your Collibra environment, but modifications can only be made using the beta version of Workflow Designer.

Report Certification levels

A report must meet the below listed criteria to achieve the corresponding certification level

- Bronze
    - Technical Steward and Owner identified
    - Description is captured
    - URL is captured
    - Data Source is captured
    - Report attributes are captured
- Silver
    - Bronze level requirements
    - Sensitivity is added
    - Metrics tracked by the report is captured
- Gold
    - Silver level requirements
    - Policies that govern the report are captured
    - Business Dimension is captured

Dataset Certification levels

A dataset must meet the below listed criteria to achieve the corresponding certification level

- Bronze
    - Technical Steward and Owner identified
    - Description is captured

- ○ Data Elements that make the dataset are captured
- ● Silver
  - ○ Bronze level requirements
  - ○ Sensitivity is added
  - ○ Business Dimension is captured
- ● Gold
  - ○ Silver level requirements
  - ○ Data Sharing Agreement is captured

Metric Certification levels

A measure or KPI must meet the below listed criteria to achieve the corresponding certification level

- ● Bronze
  - ○ Business Steward and Owner identified
  - ○ Definition is captured
  - ○ Calculation Rule is captured
- ● Silver
  - ○ Bronze level requirements
  - ○ Purpose is added
  - ○ Relationship between Measure and KPI is captured
- ● Gold
  - ○ Silver level requirements
  - ○ Business Process that creates the measure/KPI is captured
  - ○ System of Record is captured

3. Walkthrough

The solution comprises:
- ● A dashboard to serve as a hub for all trusted business reporting actions
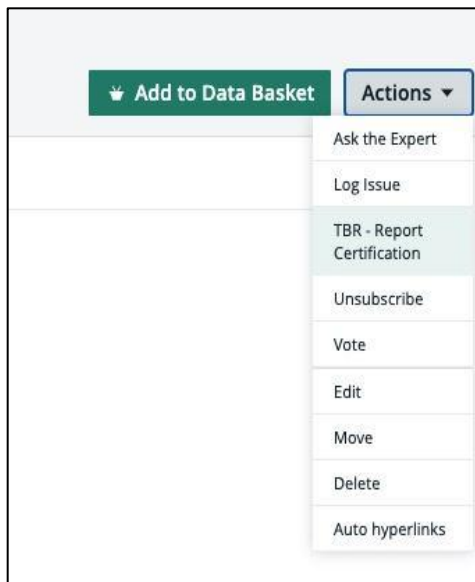- ● Workflows to initiate and certify reports, datasets and metrics

Starting from the dashboard, hyperlinks can be configured to find both certified and non-certified assets in each section.

Find Datasets:

Certified Datasets

All Datasets
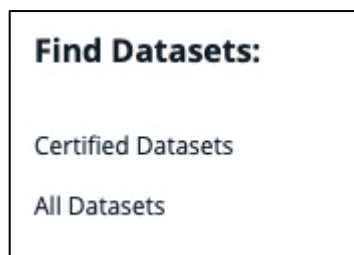
The Certify button on the dashboard can be used to initiate certification from right there.

Certify Report

Alternatively, certification can be initiated from the asset to be certified.

☗ Add to Data Basket   Actions ▾

Ask the Expert

Log Issue

TBR - Report Certification

Unsubscribe

Vote

Edit

Move

Delete

Auto hyperlinks

Community manager reviews and confirms the Stewards and Owners.

Review and Assign Roles

Related to

PBRT Power BI Report

Please review the Technical Steward(s) and Owner(s) of this Report.

Would you like to change the Technical Steward(s) and/or Owner(s)? *

○ No
○ Yes, Technical Stewards Only
○ Yes, Owners Only
◉ Yes, Both

Technical Steward(s)

| Select ▼ |

Technical Steward Groups

| Select ▼ |

Owner(s)

| Select ▼ |

Owner Groups

| Select ▼ |

Proceed

Based on the radio button selection, the drop downs will adjust dynamically.

The Steward reviews and ensures that the certification criteria are met.

Technical Steward Review

Related to

PBRT Power BI Report

This Report is currently at certification level: **None** (see criteria below).

At minimum, bronze level requirements have to be met in order to proceed.

As the Technical Steward, please

- Review the information captured
- Use the 'Refresh' button to verify certification status
- Use on 'Proceed' to present this for Owner's approval

- **Bronze**

  ✅ Technical Steward and Owner identified

  ❌ Description is captured (min 100 chars)

  ❌ URL is captured

  ❌ Data Source is captured

  ✅ Report attributes are captured

  Silver *(In addition to Bronze level requirements)*

  ❌ Sensitivity of the data is captured

  ❌ Metrics tracked by the report is captured

- **Gold** *(In addition to Silver level requirements)*

  ❌ Policies that govern the report are captured

  ❌ Business Dimension is captured

Refresh

As adjustments are made, use Refresh button to refresh the certification requirements.

Once the Bronze level requirements are met, the Proceed button will be available.

Technical Steward Review

Related to

PBRT **Power BI Report**

This Report is currently at certification level: **Bronze** (see criteria below).

At minimum, bronze level requirements have to be met in order to proceed.

As the Technical Steward, please

- Review the information captured
- Use the 'Refresh' button to verify certification status
- Use on 'Proceed' to present this for Owner's approval

- **Bronze**

  ✅ Technical Steward and Owner identified

  ✅ Description is captured (min 100 chars)

  ✅ URL is captured

  ✅ Data Source is captured

  ✅ Report attributes are captured

  Silver *(In addition to Bronze level requirements)*

  ❌ Sensitivity of the data is captured

  ❌ Metrics tracked by the report is captured

- **Gold** *(In addition to Silver level requirements)*

  ❌ Policies that govern the report are captured

  ❌ Business Dimension is captured

Refresh   Proceed

Owner can suggest edits, propose a new Owner or certify.

Changes are sent back to the Stewards, Owner change is sent to the Community Manager
Certification results in completion of the workflow.

4. How to install

To install Trusted Business Reporting, you must import the report certification CMA file
included in the Marketplace download.

Steps

1. Create a full [backup](#) of your Collibra Data Intelligence Cloud Environment.
2. Sign in to Collibra using an account with Sysadmin privileges.
3. Follow the steps to [import](#) the .cma file.

5. Configuration

This section describes the configuration adjustments to be done to enable and test the solution.

5.1 General

After successfully importing the .cma file, verify that the six new workflows are enabled. Review the configuration variables described below in detail and adjust as necessary.

5.2 Dashboard

After successfully importing the .cma file, locate the Trusted Business Reporting Hub Dashboard. In order to add hyperlinks to the 'Find' section in the dashboard, global views and/or catalog views need to be configured.

For example, to create a view of certified reports, suggested configuration is as shown below.

5.3 Initiate Report Certification Workflow

This workflow helps initiate report certification from the Trusted Business Reporting Dashboard.

Access the workflow configuration via ⚙ **Settings** → **Workflows** → **Definitions** → **TBR Initiate Report Certification**.
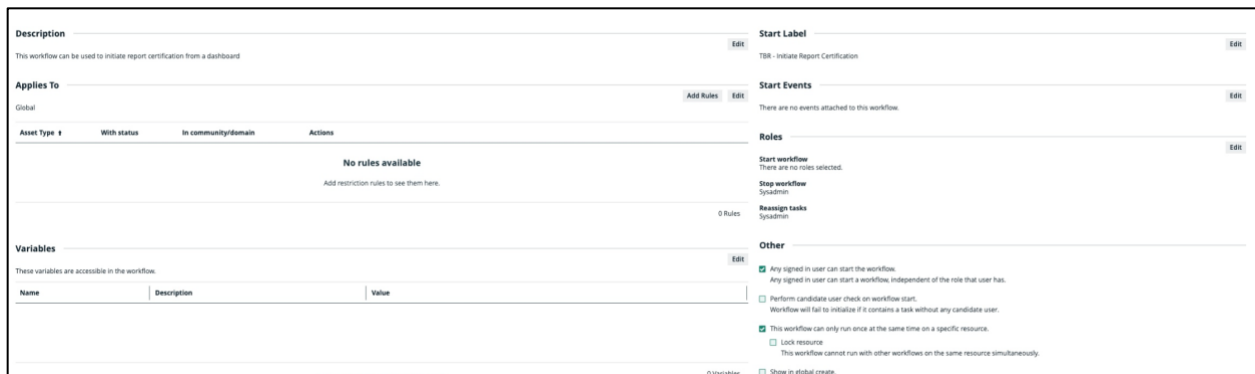
As the purpose is solely to initiate a Report certification, there are no configuration variables associated with this workflow.

Other

The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged-in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any signed in user can start the workflow.	Yes
Perform candidate user check on workflow start.	No
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No

5.4 Report Certification Workflow

This workflow can either be triggered through the 'Initiate Report Certification' workflow or directly from the report asset that needs certification.

Access the workflow configuration via ⚙ **Settings** → **Workflows** → **Definitions** → **TBR-MP - Report Certification**.

Applies to

This workflow applies to the following asset types, adjust this as you see fit for your implementation.

Asset type	Restriction	Remark
Report	None	None

Tip   Ensure that the statuses 'Certified - Bronze', 'Certified - Silver', and 'Certified - Gold' are not assigned to the asset types selected here. This ensures that these statuses cannot be set using the edit button on the asset.

Configuration variables

You can edit the configuration variables directly from the workflow definition page by clicking [Edit] in the upper-right corner of the variables table.

Tip   Here is the guide to create a characteristic and assign it to an asset type. The characteristics used by the certification workflows are included in the cma file. It is recommended that you review and ensure the assignments are added for relevant asset types.

Note   Capturing the attributes used by a report is a bronze level requirement in this implementation. We are aware that based on how the reports are cataloged, there are two potential relationships that fall into this category. Report Attribute is contained in Report OR Report uses Data Attribute. This implementation looks for the presence of either and will support the reports that use either relationship.

Name	Description	Value	Purpose
attributeType_desc	UUID of attribute type Description	00000000-0000-0000-0000-000000003114	Description is a bronze level requirement. Ensure that this attribute is assigned to all asset types that would use this workflow.

attributeType_URL	UUID of attribute type URL	00000000-0000-0000-0000-000000000258	URL is a bronze level requirement. Ensure that this attribute is assigned to all asset types that would use this workflow.
attributeType_sensitivity	UUID of attribute type Sensitivity	c0e00000-0000-0000-0001-000500000055	Sensitivity is a silver level requirement. Ensure that this attribute is assigned to all asset types that would use this workflow.
relationType_measure	UUID of relation type Reports on Measure	cd000000-0000-0000-0000-000000007006	Capturing the relationship between Measures and Reports is a silver level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_DA	UUID of relation type Report is based on Data Asset	4ca8c92d-8d6e-4053-9cdb-8ac4c5d92ed8	Capturing the relationship between Data sources and Reports is a bronze level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_GA	UUID of relation type Asset is governed by Governance Asset	00000000-0000-0000-0000-000000007009	Capturing the relationship between Governance Assets (such as Policies, Standards etc.) and Reports is a gold level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_RA	UUID of relation type Report Attributes > Report	00000000-0000-0000-0000-000000007058	Capturing the Report Attributes is a bronze level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_DAttr	UUID of relation type Report > Data Attributes	00000000-0000-0000-0000-120000000021	Capturing the Report Attributes is a bronze level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_BD	UUID of relation type Report belongs to Business Dimension	8ca140b9-e3b0-4e4c-a927-0f38a3677632	Capturing the Business Dimension of a Report is a gold level requirement. Ensure that this relationship is assigned to all

			asset types that would use this workflow.
role_commMgr	Community Manager UUID	00000000-0000-0000-0000-000000005015	The Community Manager drives the certification process.
userExp_CommMgr	User Expression for Community Manager	role(Community Manager)	This user expression is used to send out the email notifications from the workflow.
role_tSteward	Technical Steward UUID	00000000-0000-0000-0000-000000005038	Technical Steward ensures that the certification requirements are met.
userExp_tSteward	User Expression for Technical Steward	role(Technical Steward)	This user expression is used to send out the email notifications from the workflow.
role_Owner	Owner UUID	00000000-0000-0000-0000-000000005040	Owner provides the final review and approval.
userExp_Owner	User Expression for Owner	role(Owner)	This user expression is used to send out the email notifications from the workflow.
underReviewStatusId	Under Review Status UUID	00000000-0000-0000-0000-000000005020	Once the certification is initiated, the report would be set to this status.
bronzeStatusId	Bronze Status UUID	cd000000-0000-0000-0000-000000005002	Based on the certification level attained, this is one of the status options. Ensure that this is not a status that is assigned to the asset types that would use this certification.
silverStatusId	Silver Status UUID	cd000000-0000-0000-0000-000000005003	Based on the certification level attained; this is one of the status options. Ensure that this is not a status that is assigned to the asset types that would use this certification.
goldStatusId	Gold Status UUID	cd000000-0000-0000-0000-000000005004	Based on the certification level attained, this is one of the status options. Ensure that this is not a status that is assigned to the asset types that would use this certification.

default_CommMgr	User expression for Default Community Manager	group(Data Intelligence Team)	As community managers shepherd the process; it is important to ensure that there will be a default community manager to account for the possibility that there is none.
formTask3DueDate	The due date expressed in duration for task 'formTask3'.	B1M	
formTask3TaskNotificationEnabled	Send notification emails for task 'formTask3'.	TRUE	
formTask3EscalationDuration	The escalation time duration for task 'formTask3'.	B1M	
formTask3EscalationType	The escalation type for task 'formTask3'.	mail	
usertask_dsReviewDueDate	The due date expressed in duration for task 'usertask_dsReview'.	B1M	
usertask_dsReviewTaskNotificationEnabled	Send notification emails for task 'usertask_dsReview'.	TRUE	
usertask_dsReviewEscalationDuration	The escalation time duration for task 'usertask_dsReview'.	B1M	
usertask_dsReviewEscalationType	The escalation type for task 'usertask_dsReview'.	mail	
formTask5DueDate	The due date expressed in duration for task 'formTask5'.	B1M	
formTask5TaskNotificationEnabled	Send notification emails for task 'formTask5'.	TRUE	
formTask5EscalationDuration	The escalation time duration for task 'formTask5'.	B1M	
formTask5EscalationType	The escalation type for task 'formTask5'.	mail	
formTask4DueDate	The due date expressed in duration for task 'formTask4'.	B1M	
formTask4TaskNotificationEnabled	Send notification emails for task 'formTask4'.	TRUE	

formTask4EscalationDuration	The escalation time duration for task 'formTask4'.	B1M
formTask4EscalationType	The escalation type for task 'formTask4'.	mail

Start label

The start label is the name of the workflow when it is visible as a button on a resource page or in the drop-down list when you add it as a button on a dashboard. You can find the **Start Label** section in the upper-right corner of the workflow definition page.

Default value: TBR Report Certification

Click ✎ to edit the label.

Start Event

A start event is an event that triggers the workflow, for example starting the workflow when an asset is created.

There is no packaged default value.

Roles

The roles define the permissions to manage the workflow. For example, if a certain task must be urgently executed but the responsible person is on sick leave, a user with the defined role can reassign that task to somebody else.

Action	Roles
Start workflow	● There are no roles selected.
Stop workflow	● There are no roles selected.
Reassign tasks	● There are no roles selected.

Other

The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged-in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any signed in user can start the workflow.	Yes
Perform candidate user check on workflow start.	No
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No

5.5 Initiate Dataset Certification Workflow

This workflow helps initiate report certification from the Trusted Business Reporting Dashboard.

Access the workflow configuration via ⚙ **Settings** → **Workflows** → **Definitions** → **TBR Initiate Dataset Certification**.

As the purpose is solely to initiate a Dataset certification, there are no configuration variables associated with this workflow.

Other

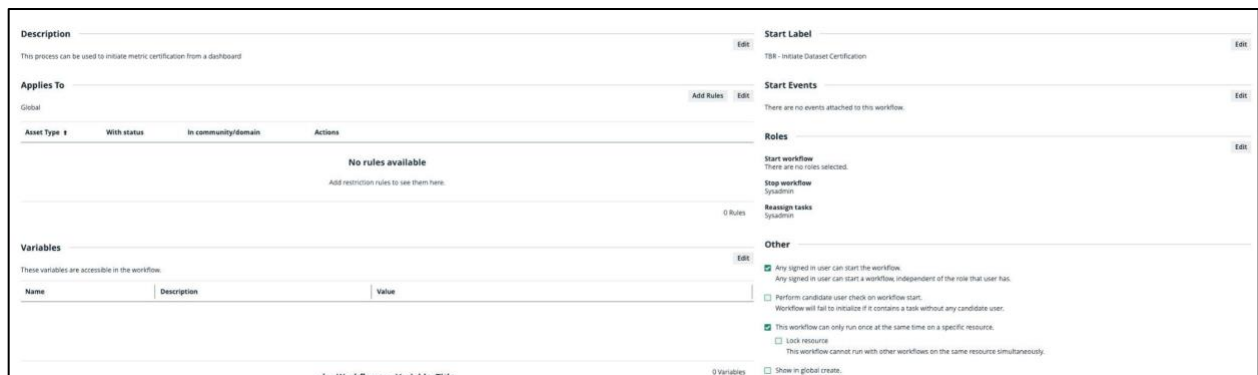The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged-in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any signed in user can start the workflow.	Yes
Perform candidate user check on workflow start.	No
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No

5.6 Dataset Certification Workflow

This workflow can either be triggered through the 'Initiate Dataset Certification' workflow or directly from the dataset asset that needs certification.

Access the workflow configuration via ⚙ **Settings** → **Workflows** → **Definitions** → **TBR-MP - Dataset Certification**.

Applies to

This workflow applies to the following asset types, adjust this as you see fit for your implementation.

Asset type	Restriction	Remark
Dataset	None	None

Tip Ensure that the statuses 'Certified - Bronze', 'Certified - Silver', and 'Certified - Gold' are not assigned to the asset types selected here. This ensures that these statuses cannot be set using the edit button on the asset.

Configuration variables

You can edit the configuration variables directly from the workflow definition page by clicking **Edit** in the upper-right corner of the variables table.

Tip Here is the guide to create a characteristic and assign it to an asset type.

Name	Description	Value	Purpose
attributeType_desc	UUID of attribute type Description	00000000-0000-0000-0000-000000003114	Description is a bronze level requirement. Ensure that this attribute is assigned to all asset types that would use this workflow.

attributeType_certifie d	UUID of attribute type Certified	00000000-0000-0000-0001-000500000001	This attribute will be updated to 'True' once certification is completed.
attributeType_sensitiv ity	UUID of attribute type Sensitivity	c0e00000-0000-0000-0001-000500000055	Sensitivity is a silver level requirement. Ensure that this attribute is assigned to all asset types that would use this workflow.
relationType_DE	UUID of relation type Data Set -> Data Elements	00000000-0000-0000-0000-000000007062	Capturing the data elements that are part of a Dataset is a bronze level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_DSA	UUID of relation type Data Set -> Data Sharing Agreement	c0e00000-0000-0000-0000-000000007436	Capturing the Data Sharing Agreement is a gold level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_BD	UUID of relation type Data Set -> Business Dimension	4d15c947-38c6-42fc-80d8-22443650751f	Capturing the Business Dimension of a Dataset is a silver level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
role_commMgr	Community Manager UUID	00000000-0000-0000-0000-000000005015	The Community Manager drives the certification process.
userExp_CommMgr	User Expression for Community Manager	role(Community Manager)	This user expression is used to send out the email notifications from the workflow.
role_tSteward	Technical Steward UUID	00000000-0000-0000-0000-000000005038	Technical Steward ensures that the certification requirements are met.
userExp_tSteward	User Expression for Technical Steward	role(Technical Steward)	This user expression is used to send out the email notifications from the workflow.
role_Owner	Owner UUID	00000000-0000-0000-0000-000000005040	Owner provides the final review and approval.
userExp_Owner	User Expression for Owner	role(Owner)	This user expression is used to send out the email notifications from the workflow.
underReviewStatusId	Under Review Status UUID	00000000-0000-0000-0000-000000005020	Once the certification is initiated, the dataset would be set to this status.
bronzeStatusId	Bronze Status UUID	cd000000-0000-0000-0000-000000005002	Based on the certification level attained, this is one of the

			status options. Ensure that this is **not** a status that is assigned to the asset types that would use this certification.
silverStatusId	Silver Status UUID	cd000000-0000-0000-0000-000000005003	Based on the certification level attained, this is one of the status options. Ensure that this is **not** a status that is assigned to the asset types that would use this certification.
goldStatusId	Gold Status UUID	cd000000-0000-0000-0000-000000005004	Based on the certification level attained, this is one of the status options. Ensure that this is **not** a status that is assigned to the asset types that would use this certification.
default_CommMgr	User expression for Default Community Manager	group(Data Intelligence Team)	As community managers shepherd the process, it is important to ensure that there will be a default community manager to account for the possibility that there is none.
formTask3DueDate	The due date expressed in duration for task 'formTask3'.	B1M	
formTask3TaskNotificationEnabled	Send notification emails for task 'formTask3'.	TRUE	
formTask3EscalationDuration	The escalation time duration for task 'formTask3'.	B1M	
formTask3EscalationType	The escalation type for task 'formTask3'.	mail	
usertask_dsReviewDueDate	The due date expressed in duration for task 'usertask_dsReview'.	B1M	
usertask_dsReviewTaskNotificationEnabled	Send notification emails for task 'usertask_dsReview'.	TRUE	
usertask_dsReviewEscalationDuration	The escalation time duration for task 'usertask_dsReview'.	B1M	
usertask_dsReviewEscalationType	The escalation type for task 'usertask_dsReview'.	mail	
formTask5DueDate	The due date expressed in duration for task 'formTask5'.	B1M	
formTask5TaskNotificationEnabled	Send notification emails for task 'formTask5'.	TRUE	
formTask5EscalationDuration	The escalation time duration for task 'formTask5'.	B1M	

formTask5Escalation Type	The escalation type for task 'formTask5'.	mail	
formTask4DueDate	The due date expressed in duration for task 'formTask4'.	B1M	
formTask4TaskNotificationEnabled	Send notification emails for task 'formTask4'.	TRUE	
formTask4Escalation Duration	The escalation time duration for task 'formTask4'.	B1M	
formTask4Escalation Type	The escalation type for task 'formTask4'.	mail	

Start label

The start label is the name of the workflow when it is visible as a button on a resource page or in the drop-down list when you add it as a button on a dashboard. You can find the **Start Label** section in the upper-right corner of the workflow definition page.

Default value: TBR Dataset Certification

Click ✐ to edit the label.

Start Event

A start event is an event that triggers the workflow, for example starting the workflow when an asset is created.

There is no packaged default value.

Roles

The roles define the permissions to manage the workflow. For example, if a certain task must be urgently executed but the responsible person is on sick leave, a user with the defined role can reassign that task to somebody else.

Action	Roles
Start workflow	• There are no roles selected.

Stop workflow	● There are no roles selected.
Reassign tasks	● There are no roles selected.

Other

The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged-in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any signed in user can start the workflow.	Yes
Perform candidate user check on workflow start.	No
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No

5.7 Initiate Metric Certification Workflow

This workflow helps initiate report certification from the Trusted Business Reporting Dashboard.

Access the workflow configuration via ⚙ **Settings** → **Workflows** → **Definitions** → **TBR Initiate Metric Certification**.

As the purpose is solely to initiate a Metric certification, there are no configuration variables associated with this workflow.

Other

The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged-in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any signed in user can start the workflow.	Yes
Perform candidate user check on workflow start.	No
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No

5.8 Metric Certification Workflow

This workflow can either be triggered through the 'Initiate Metric Certification' workflow or directly from the Measure/KPI asset that needs certification.

Access the workflow configuration via ⚙ **Settings** → **Workflows** → **Definitions** → **TBR-MP - Metric Certification**.

Applies to

This workflow applies to the following asset types, adjust this as you see fit for your implementation.

Asset type	Restriction	Remark
Measure	None	None

Tip Ensure that the statuses 'Certified - Bronze', 'Certified - Silver', and 'Certified - Gold' are not assigned to the asset types selected here. This ensures that these statuses cannot be set using the edit button on the asset.

Configuration variables

You can edit the configuration variables directly from the workflow definition page by clicking **Edit** in the upper-right corner of the variables table.

Tip Here is the guide to create a characteristic and assign it to an asset type.

Name	Description	Value	Purpose
attributeType_defn	UUID of attribute type Definition	00000000-0000-0000-0000-000000003114	Definition is a bronze level requirement. Ensure that this attribute is assigned to all asset types that would use this workflow.
attributeType_calc	UUID of attribute type Calculation Rule	00000000-0000-0000-0000-000000000258	Calculation Rule is a bronze level requirement. Ensure that this attribute is assigned to all asset types that would use this workflow.
attributeType_purpose	UUID of attribute type Purpose	c0e00000-0000-0000-0001-000500000055	Purpose is a silver level requirement. Ensure that this attribute is assigned to all asset types that would use this workflow.
relationType_SR	UUID of relation type System of Record -> Measure	cd000000-0000-0000-0000-000000007006	Capturing the System of Record is a gold level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_BP	UUID of relation type Business Process produces Measure	cd000000-0000-0000-0000-000000007004	Capturing the Business Process that creates the Metric and Reports is a gold level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
relationType_KPI	UUID of relation type Measure used to calculate KPI	cd000000-0000-0000-0000-000000007002	Capturing the relationship between Measures and KPIs is a silver level requirement. Ensure that this relationship is assigned to all asset types that would use this workflow.
role_commMgr	Community Manager UUID	00000000-0000-0000-0000-000000005015	The Community Manager drives the certification process.
userExp_CommMgr	User Expression for Community Manager	role(Community Manager)	This user expression is used to send out the email notifications from the workflow.
role_tSteward	Technical Steward UUID	00000000-0000-0000-0000-000000005038	Technical Steward ensures that the certification requirements are met.
userExp_tSteward	User Expression for Technical Steward	role(Technical Steward)	This user expression is used to send out the email notifications from the workflow.

role_Owner	Owner UUID	00000000-0000-0000-0000-000000005040	Owner provides the final review and approval.
userExp_Owner	User Expression for Owner	role(Owner)	This user expression is used to send out the email notifications from the workflow.
underReviewStatusId	Under Review Status UUID	00000000-0000-0000-0000-000000005020	Once the certification is initiated, the report would be set to this status.
bronzeStatusId	Bronze Status UUID	cd000000-0000-0000-0000-000000005002	Based on the certification level attained, this is one of the status options. Ensure that this is not a status that is assigned to the asset types that would use this certification.
silverStatusId	Silver Status UUID	cd000000-0000-0000-0000-000000005003	Based on the certification level attained, this is one of the status options. Ensure that this is not a status that is assigned to the asset types that would use this certification.
goldStatusId	Gold Status UUID	cd000000-0000-0000-0000-000000005004	Based on the certification level attained, this is one of the status options. Ensure that this is not a status that is assigned to the asset types that would use this certification.
default_CommMgr	User expression for Default Community Manager	group(Data Intelligence Team)	As community managers shepherd the process, it is important to ensure that there will be a default community manager to account for the possibility that there is none.
formTask3DueDate	The due date expressed in duration for task 'formTask3'.	B1M	
formTask3TaskNotificationEnabled	Send notification emails for task 'formTask3'.	TRUE	
formTask3EscalationDuration	The escalation time duration for task 'formTask3'.	B1M	
formTask3EscalationType	The escalation type for task 'formTask3'.	mail	
usertask_dsReviewDueDate	The due date expressed in duration for task 'usertask_dsReview'.	B1M	
usertask_dsReviewTaskNotificationEnabled	Send notification emails for task 'usertask_dsReview'.	TRUE	

usertask_dsReviewEscalationDuration	The escalation time duration for task 'usertask_dsReview'.	B1M	
usertask_dsReviewEscalationType	The escalation type for task 'usertask_dsReview'.	mail	
formTask5DueDate	The due date expressed in duration for task 'formTask5'.	B1M	
formTask5TaskNotificationEnabled	Send notification emails for task 'formTask5'.	TRUE	
formTask5EscalationDuration	The escalation time duration for task 'formTask5'.	B1M	
formTask5EscalationType	The escalation type for task 'formTask5'.	mail	
formTask4DueDate	The due date expressed in duration for task 'formTask4'.	B1M	
formTask4TaskNotificationEnabled	Send notification emails for task 'formTask4'.	TRUE	
formTask4EscalationDuration	The escalation time duration for task 'formTask4'.	B1M	
formTask4EscalationType	The escalation type for task 'formTask4'.	mail	

Start label

The start label is the name of the workflow when it is visible as a button on a resource page or in the drop-down list when you add it as a button on a dashboard. You can find the **Start Label** section in the upper-right corner of the workflow definition page.

Default value: TBR Metric Certification

Click ✏ to edit the label.

Start Event

A start event is an event that triggers the workflow, for example starting the workflow when an asset is created.

There is no packaged default value.

Roles

The roles define the permissions to manage the workflow. For example, if a certain task must be urgently executed but the responsible person is on sick leave, a user with the defined role can reassign that task to somebody else.

Action	Roles
Start workflow	● There are no roles selected.
Stop workflow	● There are no roles selected.
Reassign tasks	● There are no roles selected.

Other

The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged-in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any signed in user can start the workflow.	Yes
Perform candidate user check on workflow start.	No
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No