

Data Management Workflows in Salesforce

Force.com® by Salesforce.com, Inc., is a platform that enables companies to build powerful workflows in the Salesforce® user interface without writing code.

Information Asset has leveraged Force.com to build robust workflows in Salesforce for third-party data management software from Alation®, Collibra®, IBM®, and Informatica®. Example workflows include:

- Authoring and approving new business terms for third-party business glossaries
- Submitting and approving requests for ingestion of metadata into third-party data catalogs
- Requesting and approving access to data sets governed in third-party data governance solutions

Figure 1 shows a change request in Salesforce for updating the definition of an Alation article. The approver can accept or reject the request.

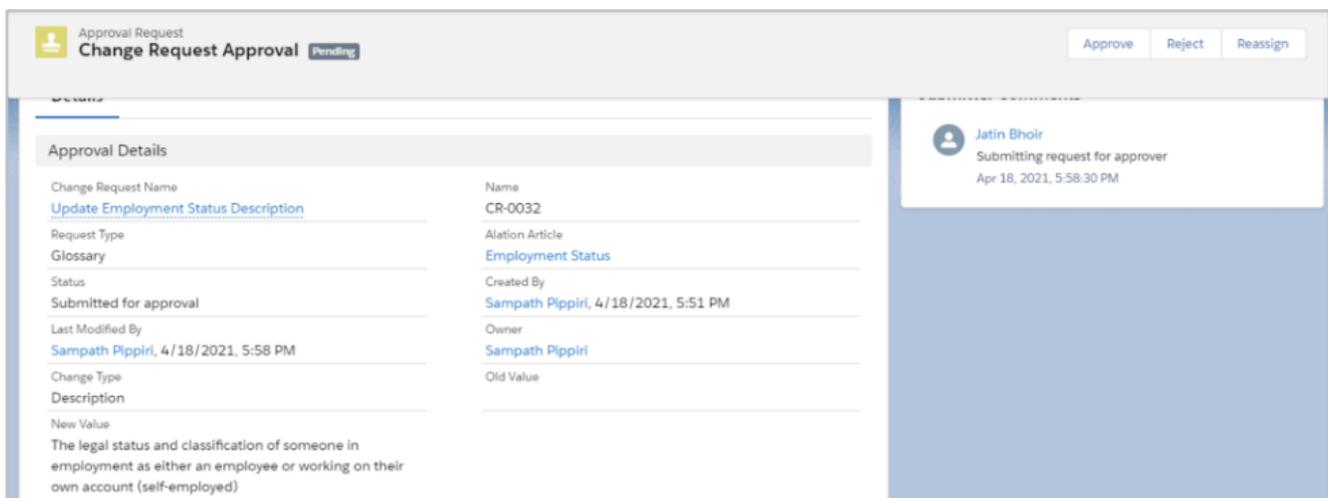


Figure 1: Salesforce Approval Screen to Update an Alation Article

Once the request is approved in Salesforce, the article is updated in Alation, as shown in Figure 2.

The screenshot displays a Salesforce-style approval request interface. At the top, it shows 'Approval Request' and 'Data Quality Rule Approval' with a 'Pending' status. Action buttons for 'Approve', 'Reject', and 'Reassign' are visible. Below this, a summary row lists: Submitter (Alex Scroggins), Date Submitted (Feb 13, 2020), Actual Approver (Data Stewards Queue), and Assigned To (Data Stewards Queue). The main content is divided into two sections: 'Details' and 'Submitter Comments'. The 'Details' section includes 'Approval Details' with fields for Data Quality Rule Name ('Square Feet must be greater than 0'), Created By ('Alex Scroggins, 2/13/2020, 9:19 AM'), Data Quality Dimension, Validity, Last Modified By ('Alex Scroggins, 2/13/2020, 9:19 AM'), Owner ('Alex Scroggins'), Criticality, Description, and Status ('Submitted for Approval'). The 'Submitter Comments' section shows a comment from Alex Scroggins: 'Submitted for Approval' on Feb 13, 2020, at 9:19:35 AM.

Figure 2: Alation Article Updated After Approval in Salesforce

This solution provides several key benefits:

- Leverage the capabilities of the Force.com platform for powerful data management workflows, including features such as multistep approval processes, dynamic approval routing, delegated approvers, email notifications, API callouts to external systems for automation, and more.
- Increase usage and adoption of your existing data management tool investments by exposing them through Salesforce.
- Apply your existing knowledge of Salesforce and familiarity with its user interface to extend the power of your existing data management solutions from Alation, Collibra, IBM, and Informatica.

Next Steps

If you'd like to explore how to build custom Salesforce applications for data-enabled digital transformation, please contact sales@information-asset.com. For more information, please visit our website, www.information-asset.com.