



26 March 2024

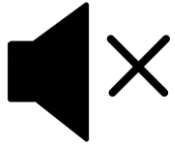
# Custom Workflows in CDGC and UI Personalization with Custom Layouts

- Khadarvali Shaikh, Sr Solution Architect, CSA
- Rebecca South, Principal Solution Architect, CSA
- Avanish Srivastava, Manager, Solution Architect, CSA

**Where data  
& AI come to** 

The LIFE logo consists of the letters "LIFE" in a bold, sans-serif font, where each letter is filled with a different, vibrant color (red, blue, green, yellow, purple).

# Housekeeping Tips



- Today's Webinar is scheduled for **1 hour**
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Q&A option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available on our [Success Portal](#) - where you can download the **slide deck** for the presentation. The link to the recording will be emailed as well.
- Please take time to complete the **post-webinar survey** and provide your feedback and suggestions for upcoming topics.

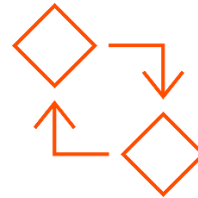
# Feature Rich Success Portal



**Bootstrap trial and  
POC Customers**



**Enriched Customer  
Onboarding  
experience**



**Product  
Learning Paths  
and Weekly  
Expert Sessions**

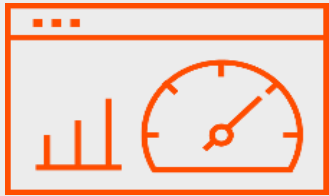


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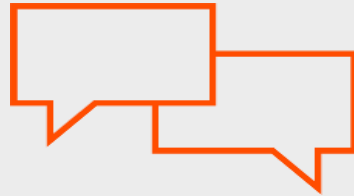
**Tailored training  
and content  
recommendations**

# More Information



## Success Portal

<https://success.informatica.com>



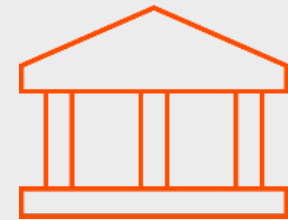
## Communities & Support

<https://network.informatica.com>



## Documentation

<https://docs.informatica.com>



## University

<https://www.informatica.com/in/services-and-training/informatica-university.html>

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# Agenda

1

Introduction to CDGC Workflows:  
Understanding the Why, What, and How

3

Case Study: Change Management with  
Custom Workflows in CDGC (including  
Demo)

5

Enhancing User Experience with UI  
Customization for CDGC Users

7

Interactive Q&A / FAQ on CDGC Workflows

2

Best Practices for Data Governance  
Workflows

4

Exploring a Sample 3-Step Approval  
Workflow

6

Case Study: UI  
Customization(Personalization) in CDGC  
(including Demo)

# Informatica Cloud Data Governance Workflows

## Why

- Regulatory Compliance, Risk Mitigation, and Transparent Auditing
- Preserving Data Integrity, Enhancing Quality, and Accountability
- Empowering Collaboration, Operational Excellence, and Comprehensive Monitoring

## What

- Sequence of Tasks for Specific Goals: A Process Flow for specific events for Data Assets with Stakeholder Involvement.
- Informatica CDGC workflows leverage the formidable capabilities of IDMC services Cloud App Integration (CAI) and Cloud Data Governance (CDGC)
- CAI empowers flexible process design with its robust feature set, while CDGC seamlessly connects governance catalog assets and stakeholders to these processes, ensuring efficient management and collaboration.

## How

- Establish the governance catalog by organizing data assets and associating stakeholders with relevant metadata to be governed.
- Determine workflow needs and either develop or repurpose processes within Informatica Cloud App Integration (CAI).
- Identify trigger events, such as creation or changes, to activate CDGC's native change management process and initiate a workflow.
- Connect the workflow to the corresponding data asset type (e.g., Business Terms, Policies) and related change events (e.g., Creation, Updates)

# Best Practices for setting up CDGC workflows

## Technical

- Utilize Out-of-the-Box Workflow Bundles(Reusable Workflows) for enhanced efficiency.
- Refer to documentation for sample workflow explanations to facilitate reuse.
- Organize all CAI processes related to CDGC in a designated folder within CAI console for better management.
- Assess stakeholder permissions requirements and establish roles with appropriate permissions on CDGC and CAI services.
- Clearly define the events necessitating workflow triggers.

## Functional

- Establish Clear Objectives: Ensure alignment with organizational goals and priorities.
- Engage Stakeholders: Involve relevant parties to secure support and alignment.
- Standardize & Simplify: Ensure consistency and efficiency across operations.
- Thoroughly Document Workflows: Document purpose, steps, and responsibilities comprehensively.
- Regularly Review and Update: Adapt to evolving business needs and regulatory requirements.
- Provide Adequate Training and Communication: Ensure users are well-trained and informed about changes.
- Monitor and Evaluate Performance: Track key metrics and conduct routine assessments.



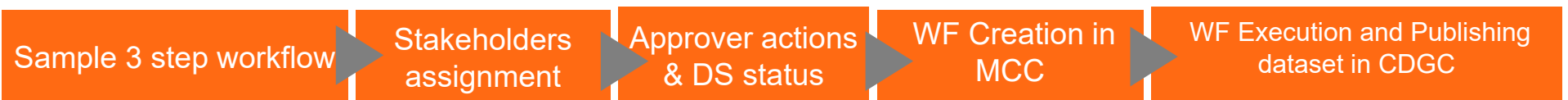
# Case Study on CDGC Custom Workflow



Jessica, Firoz, Jackson, and Khadarvali, are members of the Data Governance team at an MNC. Their organization, as part of a Data Governance program, adheres to industry standards, policies, processes, legal requirements, and data protection laws to mitigate risks and ensure data security. Each team member plays a distinct role as mentioned below, contributing to various Data Governance tasks.

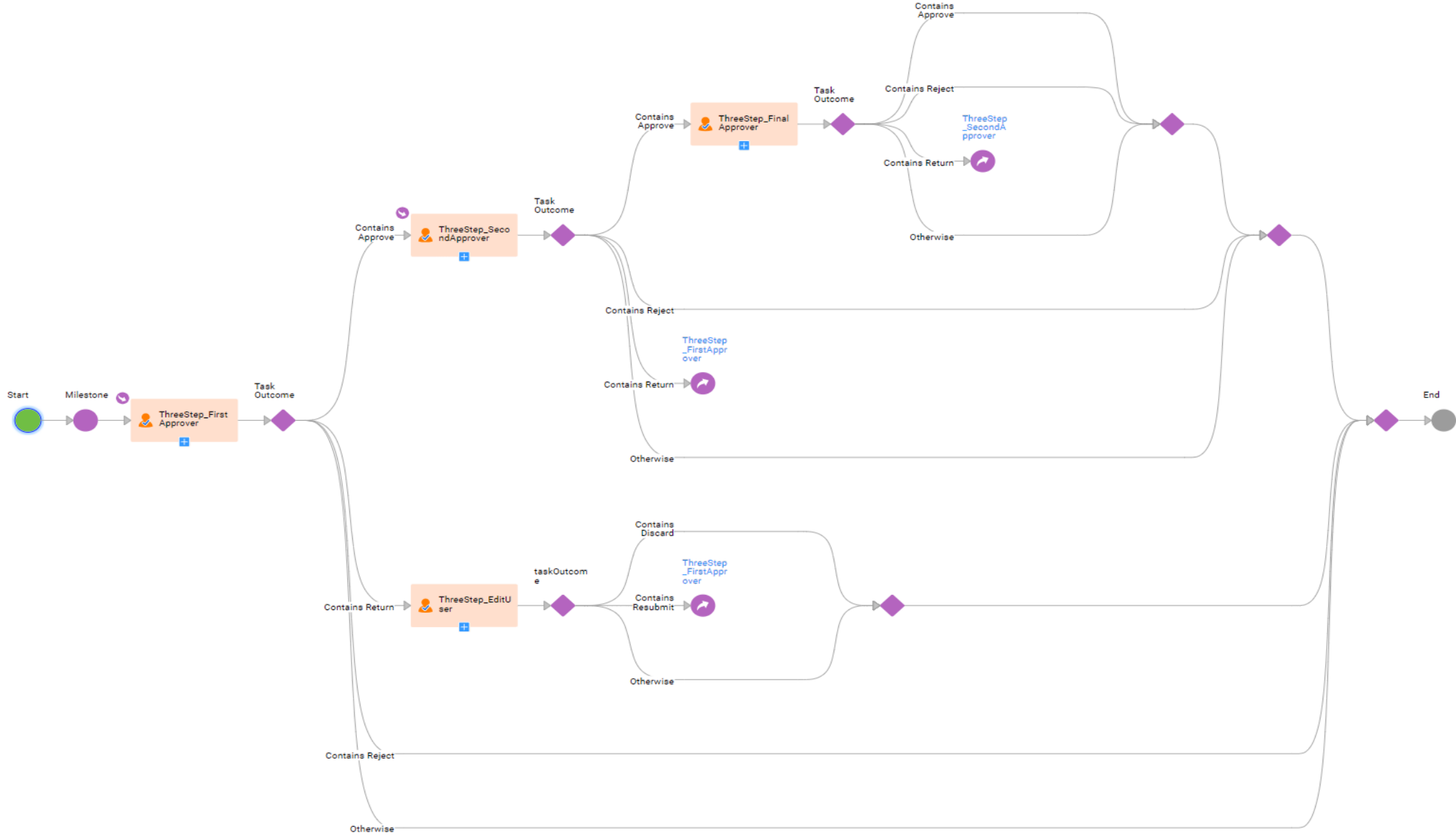
- **Operational Steward**(Jessica): is responsible for implementing and maintaining data governance practices in day-to-day operations.
- **Data Steward**(Firoz): is responsible for defining and enforcing data quality standards, managing metadata, ensuring data security, resolving data issues.
- **Data Owner**(Jackson): is responsible for defining data policies, determining data access rights representing business interests in data-related decisions.
- **Governance Administrator**(Khadarvali): is responsible for overseeing the implementation and adherence to data governance policies managing access controls, maintaining documentation.

In this case study, we will see how this data governance team utilizes the custom workflow approval process to approve the creation of a data set in CDGC by following the governance process, adhering to Data Governance standards



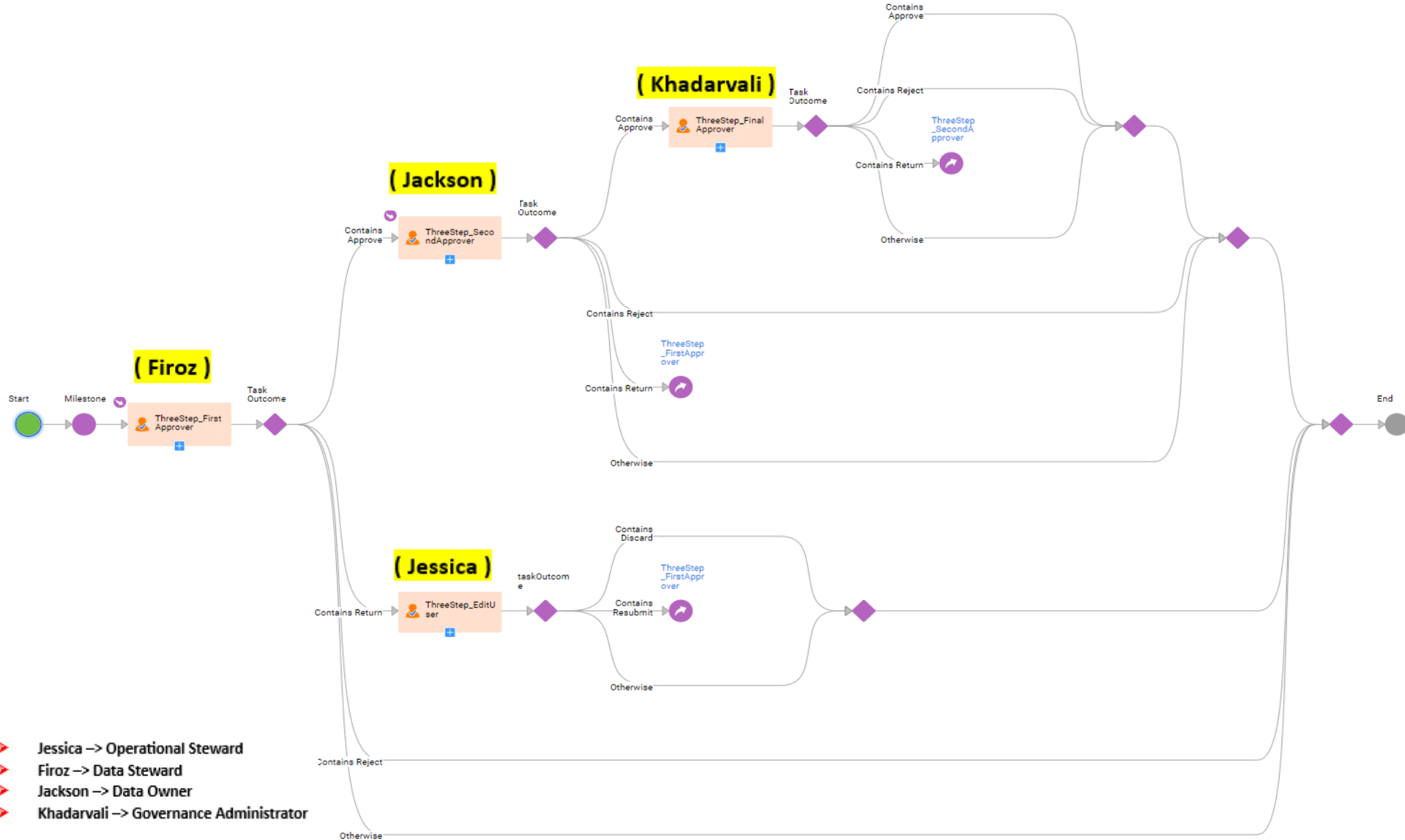
# Sample 3 step - workflow process

- Assign...
- Service
- Subpro...
- Human...
- Create
- Receive
- Wait
- Milesto...
- End
- Throw
- Decision
- Parallel...
- Jump



# Workflow Process with Assigned Stakeholders

- Assign...
- Service
- Subpro...
- Human...
- Create
- Receive
- Wait
- Milesto...
- End
- Throw
- Decision
- Parallel...
- Jump

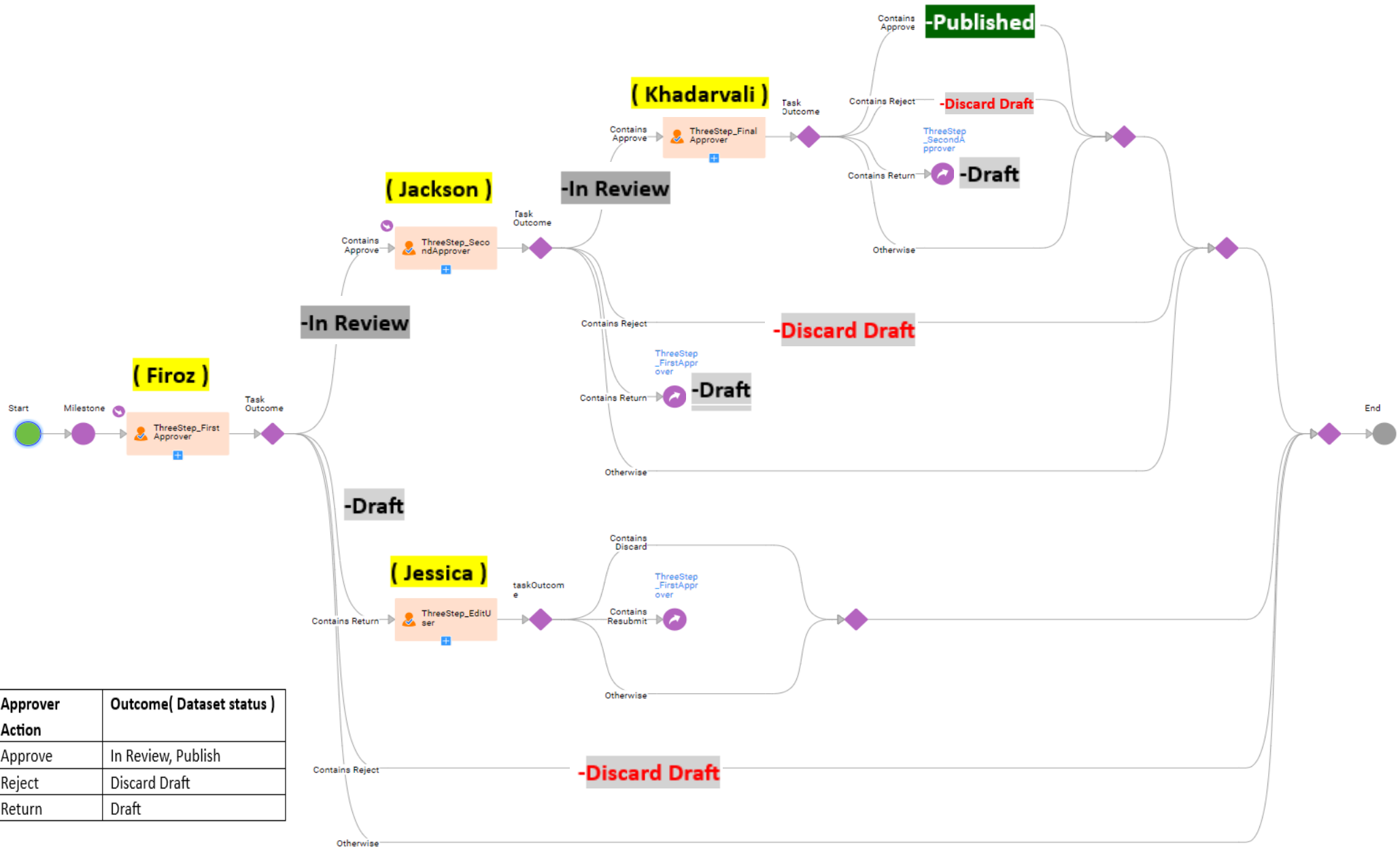


- Jessica → Operational Steward
- Firoz → Data Steward
- Jackson → Data Owner
- Khadarvali → Governance Administrator

# Dataset status based on the approver actions

Design

- Assign...
- Service
- Subpro...
- Human...
- Create
- Receive
- Wait
- Milesto...
- End
- Throw
- Decision
- Parallel...
- Jump



# DEMO

Custom Workflows



Rebecca South

# UI customization for CDGC users

# User Interface Personalization for Cloud Data Governance and Catalog

## Why

- Platforms that are tailored to the operational user are more likely to be adopted.
- Standard properties of the asset are not sufficient to meet your business requirements.
- Default layouts may not organize the attributes in the most logical order.
- Default viewing settings may not reflect how most users want to experience the tool.

## What

- Custom Attributes can be created to capture additional information about an asset.
- Layout customizations can group common attributes together for a logical representation.
- A custom Layout can also remove attributes that aren't relevant for specific users.
- Tuning the default viewing preferences can alleviate the inconvenience of users adjusting their selections on each visit.

## How

- Gather user feedback, from users as a whole or from specific user groups.
- Develop a formal process to document and implement the personalization requirements – governance is key!
- Include all aspects of the user interface – asset attributes, viewing/preview panes.
- Ensure permissions are assigned to a select group of admins to control consistency and prevent proliferation of attributes and custom layouts.
- Conduct regular review sessions for feedback and track adoption improvements.

# Plan Your Asset Customizations

- What additional attributes are needed?
- What attributes are only relevant to some users and should be hidden?
- What layout will help users spot the most important information first?

### Main Page

**Default Notice**  
BUSINESS TERM

OVERALL RATING: ☆☆☆☆ Add  
CRITICAL DATA ELEMENT: NO  
LIFECYCLE: PUBLISHED  
LAST UPDATED: Mar 11, 2024, 12:01 PM

Overview | Hierarchy | Relationships | Data Quality | Stakeholders | Tickets | History

**Description**

**Attributes**

Parent:	Reference ID:
Customer Collection Activities	BT-3
Alias Names:	Security Level:
-	-
Business Logic:	Examples:
-	-
Format Type:	Format Description:
Text	-
Critical Data Element:	
NO	

**Stakeholders**

- RS Rebecca South, Governance Administrator

**Data Quality**

There are no data quality scores to show.

**Status**

Created By: RS Rebecca South on Mar 11, 2024, 12:01 PM  
Updated By: RS Rebecca South on Mar 11, 2024, 12:01 PM

### Preview Pane

**Account**  
BUSINESS TERM

Overview | Related Assets (67)

**Description:**  
A bank account is a financial account between a bank customer and a financial institution.

PUBLISHED

☆☆☆☆ (1)

**Hierarchy:**  
Top Level

**Custom Attributes:**

- Policy Tag: Demo
- Sensitive\_Data\_PD: No

Show More

**Last Updated:**  
Oct 18, 2022, 8:36 AM

**Reference ID:**  
BT-193

**Data Quality:**  
-

**Stakeholders:**

- Rp Rashmi p, Governance Administrator
- AS Akshada Sable, COCC\_Custom\_Role

Show More

**Related Assets:**

Diagram showing relationships between assets: Account (1) is connected to Object (1), Parameter (1), Business... (2), Table (4), and Column (57).



# Case Study for UI Customization in CDGC with DEMO



Operational  
Steward

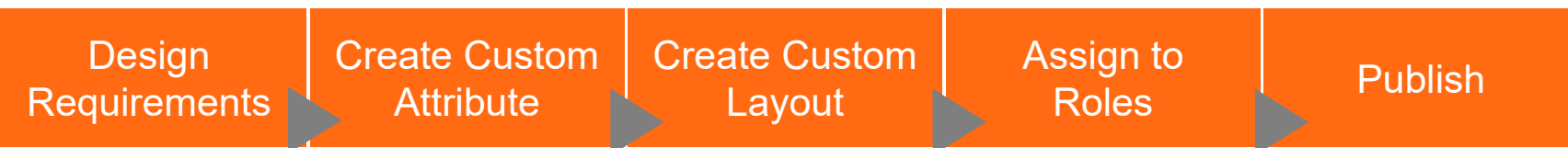


Data  
Analyst

Jessica is an operational steward in the Data Governance team at large multi-national company. The Data Analyst team has given feedback that the Data Set asset has extra fields cluttering their view and is also missing a key attribute they need for distinguishing the type of data they want to work with. They also have preferences for how to view some of the tabs related to the Data Set asset.

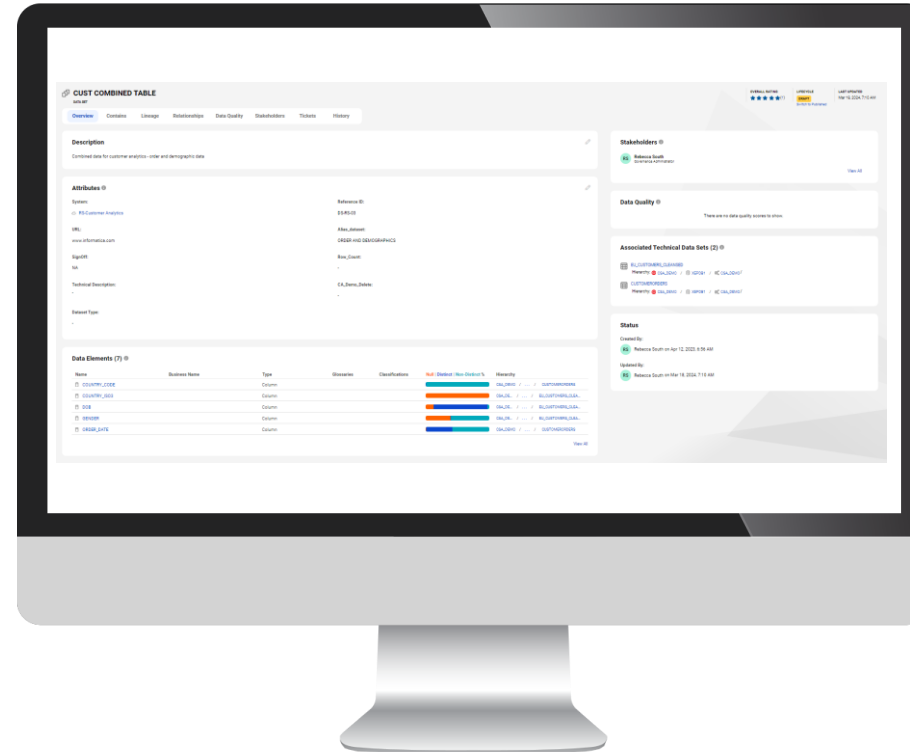
Jessica will work with the Data Analyst team to document their attribute and design requirements. She will then go to the Metadata Command Center to first create the new attribute so she can include in in the new layout. Then she will create a Custom Layout that is specific to the Data Analyst role.

Finally, Jessica will publish the layout and confirm with the Data Analysts that the changes are as expected and that they have enhanced the user experience for the team.



# DEMO

UI Customization



# FAQ on Custom Workflows

- Question: Are there pre-built workflows available to save CAI development time?
- Answer: Yes, the Informatica cloud bundle repository offers sample workflows with 1, 2, and 3 step approvals that users can reuse.
  
- Question: Where can I download the Informatica out-of-the-box workflows?
- Answer: To download, go to Administrator service -> Add on bundles -> query for "Data Governance and Catalog Workflow Bundle" in the find window -> Copy the bundle to the selected folder.
  
- Question: Can workflows be migrated between environments?
- Answer: Yes, workflows and their dependencies can be exported/imported. Note that roles and permissions must match in the target environment.
  
- Question: How is IPU consumption handled for custom workflows?
- Answer: IPU consumption for CAI workflows is tracked under CAI meters in the Administrator.

# FAQ on Custom Workflows

- Question: Are there predefined roles for these workflows in CDGC?
- Answer: Not currently. You can create roles in IDMC according to the requirements.
  
- Question: Can we search for a ticket in the catalog?
- Answer: Tickets aren't directly searchable, but you can view them all under the ticket manager and search there.
  
- Question: If a workflow ticket is rejected, can it still be viewed in CDGC?
- Answer: Yes, unless the action is 'discard draft', in which case the ticket will be deleted.
  
- Question: What if a workflow is 'in progress' but the required stakeholder has left the organization?
- Answer: A super administrator can cancel such workflows and assign new stakeholders for future requests.

# FAQ on Custom Workflows

- Question - Are parallel task in workflow supported ?
- Answer - No parallel task in workflow are not supported currently.
  
- Question - I did a bulk upload of glossary but workflow in not triggering.
- Answer - Workflow are not supported for Bulk import currently.
  
- Question - Can external change management systems like Service now be integrated?
- Answer - No integration with 3rd party ticketing tool is not supported



# Thank You

Where data & AI come to **LIFE**

