

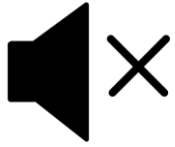
02 Dec, 2025

Customization and Persona Based Experiences in CDGC

- Colin Craig, Senior Principal Product Manager, R&D

Where data & AI come to 

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.

Safe Harbor

Disclaimer: The information being provided herein is for informational purposes only. The development, release and timing of any Informatica product, service or functionality described herein remain at the sole discretion of Informatica and should not be relied upon in making a purchasing decision. Statements made herein are based on information currently available, which is subject to change. Such statements should not be relied upon as a representation, warranty or commitment to deliver specific products, services or functionality in the future.

Engagement and Adoption Are Essential for DG

To first build and then maintain momentum

Engagement

- A compelling reason to have initial conversations
- **Adoption**
 - Become part of the governance community
 - Actively participate, as a consumer or content manager

Today is About Supporting These Stages

Admin Users / Governance Program Coordinators – Engagement & Adoption

- How can you help your community get a positive first impression of CDGC
- How can you help your community access relevant content more easily every time they use CDGC

All Other Users - Adoption

- How can I self-help?
- How can I help my community?
- How can I control my own experience?

CDGC Feature Review

Are you aware of these? Do you use them already?

Customisation

- Attributes
- Relationships
- Asset Page
- Sensitivity & Classifications

User Community

- Saved Searches
- Widgets
- Dashboards
- Sharing Searches and Dashboards
- Grid Settings

Metadata Access Control

Roles and User Groups

- The right permissions for the right users

Asset Groups

- Control access to groups of assets

What does “Data Steward”
mean to you?

What is a Data Steward?

- Everyone seem to have one...
- IDMC doesn't offer an OOTB role with predefined privileges
- Why?
 - Customer Data Steward roles are varied
 - They don't all have the same responsibilities

Name	Last Updated	Status
Custom Limited Role	Nov 22, 2023, 12:32 AM	Enabled
custom New Role	May 14, 2025, 4:26 AM	Enabled
Data Access Owner	Oct 1, 2025, 9:45 AM	Enabled
Data Catalog Sensitive	Sep 27, 2022, 11:43 PM	Enabled
Data Integration Data Previe...	Mar 8, 2019, 4:20 PM	Enabled
Data Integration Task Executor	Oct 2, 2024, 10:06 PM	Enabled
Dataloader Admin	Nov 9, 2022, 10:16 PM	Enabled
Data Marketplace Administra...	Nov 7, 2024, 8:59 PM	Enabled
Data Marketplace Category O...	Nov 7, 2024, 8:59 PM	Enabled
Data Marketplace Data Collec...	Nov 7, 2024, 8:59 PM	Enabled
Data Marketplace Data Collec...	Nov 7, 2024, 8:59 PM	Enabled
Data Marketplace Delivery Te...	Nov 7, 2024, 8:59 PM	Enabled
Data Marketplace Technical ...	Nov 7, 2024, 8:59 PM	Enabled
Data Marketplace User	May 9, 2024, 10:14 PM	Enabled
Data Owner	Aug 21, 2024, 2:58 AM	Enabled

DataPreview	Jun 15, 2022, 10:02 AM	Enabled
Data Scientist	Aug 11, 2025, 8:19 AM	Enabled
Data Steward	Jan 2, 2024, 11:34 PM	Enabled
Deployer	Oct 1, 2025, 9:45 AM	Enabled
Designer	Nov 13, 2025, 5:55 PM	Enabled

Understand the Needs of *Any* Role

Different Communities have different

- Levels of technical knowledge
- Ways of looking at common assets
- Objectives

...which all affects what they expect to see in/get from CDGC

Customisation

Customisation: Talk Your Language

“Predefined” Attributes OOTB – Edit/Delete Them, Create Your Own

Informatica Metadata Command Center

INFA CDGC PM-CC

Customize

Asset Customization Custom Catalog Source Types Metadata Models Asset Groups

Asset Types Find

Attributes 1

View all attributes that are associated with asset

Business Assets

Data Marketplace

- Consumer Access
- Data Collection
- Order
- Terms Of Use

Data Access Asset

- Data Access Control
- Data Filter
- Data De-identification
- Data Protection
- Precedence Tier

Data Classification

- Data Element Classification

Technical Assets

- Microsoft Azure Data Lake Storage Gen2**
 - Catalog Source
 - Attribute

Details: View all attributes that are associated with asset types Create

Attributes

Attributes (26) Find

Name	Data Type	Asset Type	Mandatory	Search and Filter	Status	Attribute Type
AI Model Purpose	Text Field - Multi Line	AI Model	No	Yes	PUBLISHED	Predefined
AI System Type	Dropdown - Single Select	AI System	No	Yes	PUBLISHED	Predefined
Architecture Type	Dropdown - Single Select	AI Model	No	Yes	PUBLISHED	Predefined
Asset ID	Text Field - Single Line	System	No	Yes	PUBLISHED	Predefined
Business Logic	Text Field - Multi Line	Metric +2	No	No	PUBLISHED	Predefined
Data Element Classification Catego...	Dropdown - Multi Select	Data Element Classificati...	No	Yes	PUBLISHED	Predefined
Development Stage	Dropdown - Single Select	AI System	No	Yes	PUBLISHED	Predefined
Dimension	Dropdown - Single Select	Data Quality Rule Tem... +1	Yes	Yes	PUBLISHED	Predefined
Effective Date	Date	Policy	No	No	PUBLISHED	Predefined
End Date	Date	Policy +1	No	No	PUBLISHED	Predefined
Environment	Dropdown - Single Select	AI Model	No	Yes	PUBLISHED	Predefined
Format Description	Text Field - Single Line	Metric +1	No	Yes	PUBLISHED	Predefined
Format Type	Dropdown - Single Select	Metric +1	No	Yes	PUBLISHED	Predefined
Input	Text Field - Multi Line	AI Model	No	Yes	PUBLISHED	Predefined
Libraries	Text Field - Single Line	AI Model	No	Yes	PUBLISHED	Predefined
Model Format	Dropdown - Single Select	AI Model	No	Yes	PUBLISHED	Predefined

1 - 25 of 26 Items Page 1 of 2 Items Per Page: 25

Attribute Customisation

Change the name, change the values, even delete them

AI System Type

LIFECYCLE
PUBLISHED
[Create a draft](#)

LAST UPDATED
Aug 20, 2025, 1:17 AM

LAST UPDATED BY
-

Attribute Properties

Name: * AI System Type

Data Type: * Dropdown List

Subtype: * Single Select

Values: * ⓘ

Placeholder Text: The type of AI system.

Mandatory: No

Search and Filter: Yes

Asset Type: * AI System

Preview

AI System Type: The type of AI system.

- AI Application
- AI Agent
- Retrieval System
- Conversational

Attributes vs Relationships

What's the difference?

- Many users will look at the same asset for different reasons / use cases
- Attributes describe the asset
- Relationships to other assets:
 - Give context
 - Express dependencies in different situations/use cases
 - Makes owners/consumers of the linked object aware

Try to use them with this in mind

Relationships

OOTB Most Just Say “is Related to”

- What does that mean? **Very little**
- We don't know your Use Cases
- We don't know your terminology
- Give users options for why objects have relevance to each other
 - Helps API extraction for different reports/use cases

Source	Target	Relationship Type
Legal Entity	Geography	Legal entity is related to Geography
Process	Business Area	Business Area has responsibility for Process
Process	Glossary	Glossary is Data Category for Process
Process	Glossary	Glossary is Data Recipient for Process
Process	Glossary	Glossary is Data Subject for Process
Process	Legal Entity	Legal Entity is Data Processor
Process	Legal Entity	Legal Entity is Data Controller
Process	Policy	Policy provides basis for processing
Process	Policy	Policy provides basis for processing
Process	Policy	Policy provides special basis for processing
Process	Policy	Policy provides special basis for processing
Process	Policy	Policy governs data transfers in process
Process	Policy	Policy provides data retention period
Process	Policy	Policy provides data retention period
Process	Policy	Policy provides special basis for processing
Process	Policy	Policy stipulates security measures for process
Process	System	System is used in Process

Asset Page Customisation

Create Multiple Page Designs

Make the right content stand out for each community

- Design attractive pages to make them more engaging
 - Especially if you have lots of custom attributes
- Also works for Preview Panels (e.g. Search)

- Different communities of user want to see different information
 - Choose which tabs to see / in which order
 - Promote the attributes users need to see
 - Demote/remove the attributes that don't add value

Default Asset Page View - Metric

Dom 03 / Subdom 0023 /

Met 0023

METRIC

OVERALL RATING: ☆☆☆☆ Add

CRITICAL DATA ELEMENT: YES

LIFECYCLE: PUBLISHED Switch to Draft

LAST UPDATED: Nov 28, 2025, 6:20 AM

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

Description

<https://ichef.bbci.co.uk/ace/standard/976/cpsprodpb/9072/live/ead1a7a0-9384-11f0-9823-1578d5d5ad52.jpg.webp>

Attributes

Parent: Subdom 0023	Reference ID: METxxx-0023
Alias Names: xxx	Security Level: Public
Business Logic: xxx	Examples: Ex 53
Format Type: Text	Format Description: FormatDesc 53
Critical Data Element: YES	Global Definition: -

Stakeholders

- CC Colin Craig Data Steward
- CC Colin Craig Governance Administrator
- CC Colin Craig Governance Owner

[View All](#)

Asset Groups

No asset groups assigned to the parent asset. Assign asset groups first to the parent asset to propagate those asset groups to its child assets.

Data Quality

There are no data quality scores to show.

Status

Created By:
CC Colin Craig on Aug 18, 2023, 9:43 AM

Updated By:
CC Colin Craig on Nov 28, 2025, 6:20 AM

Alternate Page Design - Metric

Dom 03 / Subdom 0023 /

Met 0023

METRIC

Overview Relationships Stakeholders Data Quality

OVERALL RATING: ☆☆☆☆☆ Add
CRITICAL DATA ELEMENT: YES
LIFECYCLE: PUBLISHED Switch to Draft
LAST UPDATED: Nov 28, 2025, 6:20 AM

Definition

https://ichef.bbci.co.uk/ace/standard/976/cpsproddb/9072/live/ead1a7a0-9384-11f0-9823-1578d5d5ad52.jpg_webp

Asset Groups

No asset groups assigned to the parent asset. Assign asset groups first to the parent asset to propagate those asset groups to its child assets.

Type 1 Policy Relationships (3)

- is a Trade Secret
Hierarchy: Policies related to EU Act
- has Security Requirements
Hierarchy: Policies related to EU Act
- Article 9 Personal Data Special Category
Hierarchy: Policies related to EU Act

Type 2 Policy Relationships (2)

- To be shared
- Voluntarily shared for fre...

Custom Name for Attributes Panel

Parent: Subdom 0023
Alias Names: xxx
Business Logic: xxx

Reference ID: METxxx-0023
Security Level: Public
Critical Data Element: YES

Data Quality

There are no data quality scores to show.

Stakeholders

- CC Colin Craig Data Steward
- CC Colin Craig Governance Administrator
- CC Colin Craig Governance Owner

View All

Status

Created By: CC Colin Craig on Aug 18, 2023, 9:43 AM
Updated By: CC Colin Craig on Nov 28, 2025, 6:20 AM

Default Page Design – Data Set

Social Media Marketing /

...
🗨️
📄
🔄
✕

Subscriber Details

DATA SET

Overview
Contains
Lineage
Relationships
Data Quality
Reference Data
Stakeholders
Tickets
History

Description

Contact details for active users

Attributes

Parent: [Social Media Marketing](#) Reference ID: DS-81

test DS CA: -

Data Elements (18)

Name	Business Name	Type	Glossaries	Classifications	Null Distinct Non-Distinct %	Hierarchy
C_CURRENT_ADDR_SK		Column			<div style="width: 100%; height: 10px; background: linear-gradient(to right, blue, green);"></div>	Snowflake Dem... / ... /
C_PREFERRED_CUST_FLAG		Column			<div style="width: 100%; height: 10px; background: linear-gradient(to right, blue, green);"></div>	Snowflake Dem... / ... /
C_BIRTH_YEAR		Column		Birth date	<div style="width: 100%; height: 10px; background: linear-gradient(to right, blue, green);"></div>	Snowflake Dem... / ... /
C_LAST_REVIEW_DATE		Column			<div style="width: 100%; height: 10px; background: linear-gradient(to right, blue, green);"></div>	Snowflake Dem... / ... /
C_FIRST_NAME		Column		First Name	<div style="width: 100%; height: 10px; background: linear-gradient(to right, blue, green);"></div>	Snowflake Dem... / ... /

Stakeholders

[CC](#) Colin Craig
Governance Administrator

[View All](#)

Asset Groups

No asset groups assigned to the parent asset. Assign asset groups first to the parent asset to propagate those asset groups to its child assets.

Data Quality

There are no data quality scores to show.

Associated Technical Data Sets (1)

[CUSTOMER](#)
Hierarchy: [Snowflake Demo DB](#) / [DEMO_DB](#) / [EDC_DEMO](#)

Status

Created By:
[CC](#) Colin Craig on Nov 14, 2024, 2:35 PM

Updated By:
[CC](#) Colin Craig on Nov 14, 2024, 2:43 PM

Alternate Page Design – Data Set

Social Media Marketing /

Subscriber Details
DATA SET

Overview | Contains | Relationships | Lineage

OVERALL RATING: ☆☆☆☆ Add
LIFECYCLE: PUBLISHED
LAST UPDATED: Nov 14, 2024, 2:43 PM

Associated Technical Data Sets (1)

CUSTOMER
Hierarchy: Snowflake Demo DB / DEMO_DB / EDC_DEMO /

Data Elements (18)

Name	Business Name	Type	Glossaries	Classifications	Null Distinct Non-Distinct %	Hierarchy
C_CURRENT_ADDR_SK		Column				Snowflake Dem... / ... /
C_PREFERRED_CUST_FLAG		Column				Snowflake Dem... / ... /
C_BIRTH_YEAR		Column		Birth date		Snowflake Dem... / ... /
C_LAST_REVIEW_DATE		Column				Snowflake Dem... / ... /
C_FIRST_NAME		Column		First Name		Snowflake Dem... / ... /

[View All](#)

Description [✎](#)

Contact details for active users

Status

Created By:
CC Colin Craig on Nov 14, 2024, 2:35 PM

Updated By:
CC Colin Craig on Nov 14, 2024, 2:43 PM

Default Preview Panel – Search

The screenshot displays a search interface for business terms related to policy. On the left, a 'Filters' sidebar includes 'Asset Type (1)' with a search box and 'Business Term (202)' selected. Below are 'Additional Filters' such as 'create date', 'Critical Data Element', 'DropDownMultiSelect', 'Format Type', and 'SubType'. Further down are 'Lifecycle (2)', 'Created By (15)', 'Created On', 'Updated By (17)', 'Updated On', 'Stakeholders (47)', 'Asset Groups', 'Ratings', and 'Data Marketplace'.

The main 'Search Results (202)' section lists several business terms, each with a 'CDE' label and 'Top Level' status. The first result is 'Phone Number', which is highlighted. Other results include 'Address', 'Email Address', 'First Name', 'Party ID', 'County Court Judgements', and 'Religion'. At the bottom of the results, it shows '1 - 25 of 202 Items' and 'Page 1 of 9'.

The 'Phone Number' preview panel on the right is highlighted with a red box. It shows the asset name 'Phone Number' with a 'CDE' label and 'BUSINESS TERM' status. The 'Overview' tab is active, showing 'Related Assets (76)'. The 'Description' states: 'The phone number that can be used to get in touch with an individual.' It also shows 'PUBLISHED' and 'CDE' status, 'Hierarchy: Top Level', and 'Custom Attributes: create date: - Sub Type: -'. A 'Show More' link is present. The 'Last Updated' date is 'May 16, 2022, 11:20 PM' and the 'Reference ID' is 'TERM-8'. The 'Data Quality' section shows a '93.96%' score with a 'Rules Against Target' bar chart. The bar chart indicates 25 'Good' items (green), 8 'Acceptable' items (yellow), and 5 'Not Acceptable' items (red). The 'Stakeholders' section is empty. The 'Related Assets' section shows a network diagram with 'Phone Number' at the center, connected to 'Policy' (4), 'View Column' (21), 'Data Quality Rule Template' (2), 'Column' (46), 'Calculation' (1), and 'Phone Number' (1).

Custom Preview Panel – Search

The screenshot displays a search interface for 'business term related to policy'. On the left, a 'Filters' sidebar includes 'Asset Type (1)' with a search box, 'Business Term (202)', and 'Additional Filters' such as 'create date', 'Critical Data Element', 'DropDownMultiSelect', 'Format Type', and 'SubType'. The main 'Search Results (202)' area lists several business terms: 'Phone Number', 'Address', 'Email Address', 'First Name', 'Party ID', 'County Court Judgements', and 'Religion'. Each result includes a 'BUSINESS TERM' label and a 'Top Level' indicator, along with a brief description.

The 'Phone Number' result is highlighted, and its detailed preview is shown on the right. The preview includes a 'Save Search' button, a 'Phone Number BUSINESS TERM' header, and an 'Overview' section with 'Related Assets (76)'. The 'Description' states: 'The phone number that can be used to get in touch with an individual.' The 'Reference ID' is 'TERM-8'. A 'PUBLISHED CDE' badge is present. The 'Data Quality' section features a donut chart showing '93.96%' and a 'Rules Against Target' bar chart. The bar chart indicates 25 Good, 8 Acceptable, and 5 Not Acceptable rules. The 'Related Assets' section shows a network diagram with 'Phone Number' at the center, connected to 'Policy' (4), 'View Column' (21), 'Column' (46), 'Subdomain' (1), 'Data Set' (1), 'Calculation' (1), and 'Data Quality Rule Template' (2).

Classifications and Sensitivity

Classifications and Sensitivity

Managed in MCC

The screenshot shows the Informatica Metadata Command Center interface. The top navigation bar includes the Informatica logo, 'Metadata Command Center', and user information 'INFA CDGC PM'. A left sidebar contains navigation options: '+ New...', 'Home', 'Explore', 'Monitor', 'Configure', 'Customize', and 'Access Control'. The main area is titled 'Customize' and has tabs for 'Assets and Pages', 'Custom Catalog Source Types', 'Metadata Models', and 'Asset Groups'. The 'Assets and Pages' tab is active, showing a search bar and a list of asset types. Under 'Data Classification', 'Data Element Classification' is selected. The 'Details: Data Element Classification' view shows a table of attributes.

Name	Data Type	Asset Type	Mandatory	Search and Filter	Status	Attribute Type	Default Value
<input type="checkbox"/> Classification Category	Dropdown - Multi Select	Data Element Classificati...	No	Yes	PUBLISHED	Predefined	
<input type="checkbox"/> Sensitivity	Dropdown - Single Select	Data Element Classificati...	No	Yes	PUBLISHED	Predefined	NONE

Custom Sensitivity Levels

Sensitivity

Save Publish [trash] [close]

LIFECYCLE: DRAFT Switch to Published | LAST UPDATED: Oct 15, 2025, 3:38 AM | LAST UPDATED BY: Colin Craig

Attribute Properties

Name: * Sensitivity
Data Type: * Dropdown List
Subtype: * Single Select
Values: * [info]

Placeholder Text: sensitivity
Mandatory: No
Search and Filter: Yes
Asset Type: * Data Element Class

Default	Value
<input type="radio"/>	NONE
<input type="radio"/>	1 Low
<input type="radio"/>	2 Medium
<input type="radio"/>	3 Medium High
<input type="radio"/>	4 PII
<input type="radio"/>	5 Sensitive PII
<input type="radio"/>	6 Very Sensitive PII
<input type="radio"/>	7 Very Very Sensitive PII
<input checked="" type="radio"/>	8 Extra Special Super Sensitive PII

Clone and Amend Classification Rules

Explore Data Classifications ▼ Import Predefined Content

Data Classifications (375) Find ↻ 🔍 🔼 🔽

<input type="checkbox"/>	Name ↑	Type	Description	Sensitivity	Category	Updated On	Updated By	
<input type="checkbox"/>	11a1	Data Element		-	PHI +4	Oct 25, 2025, 12:51 AM	Sreedhar Panduri	⋮
<input type="checkbox"/>	23423432	Data Element		-	Another Random +3	Sep 24, 2025, 2:20 AM	Sreedhar Panduri	
<input type="checkbox"/>	ABA Routing New	Data Element	This data element classification cl...	2 MEDIUM	PII +1	Oct 14, 2025, 3:31 AM	Sreedhar Panduri	
<input type="checkbox"/>	ABA Routing No	Data Element	This data element classification cl...	2 MEDIUM	PII	Oct 14, 2025, 3:31 AM	Sreedhar Panduri	
<input type="checkbox"/>	ABA Routing No_copy	Data Element	This data element classification cl...	3 MEDIUM HIGH	-	May 8, 2025, 1:36 AM	Colin Craig	
<input type="checkbox"/>	ABA Routing No_test	Data Element	This data element classification cl...	3 MEDIUM HIGH	-	May 8, 2025, 1:36 AM	Colin Craig	
<input type="checkbox"/>	ABA Routing No1	Data Element	This data element classification cl...	3 MEDIUM HIGH	-	Apr 28, 2025, 5:07 AM	Sreedhar Panduri	
<input type="checkbox"/>	ABA Routing Test	Data Element	This data element classification cl...	2 MEDIUM	-	Apr 16, 2025, 5:53 AM	Sohan Dhanuka	
<input type="checkbox"/>	abc	Data Element		-	-	Nov 2, 2025, 8:33 PM	Sreedhar Panduri	
<input type="checkbox"/>	actor	Data Element		-	-	Jul 15, 2025, 3:50 AM	Krishna V	
<input type="checkbox"/>	Address Line 1	Data Element	This data element classification cl...	3 MEDIUM HIGH	PII	Aug 4, 2025, 2:10 AM	Krishna V	
<input type="checkbox"/>	Address Line Demo	Data Element		-	-	Jun 27, 2025, 9:20 AM	Sohan Dhanuka	
<input type="checkbox"/>	Address Line Demo Conformance	Data Element		-	-	Jun 27, 2025, 11:09 AM	Sohan Dhanuka	
<input type="checkbox"/>	Albania National ID	Data Element	This data element classification cl...	5 SENSITIVE PHI	PII	Nov 24, 2025, 5:09 PM	Krishna V	
<input type="checkbox"/>	Amex	Data Element	This data element classification cl...	5 SENSITIVE PHI	-	Apr 30, 2024, 8:32 AM	Colin Craig	
<input type="checkbox"/>	Argentina National ID (DNI)	Data Element	This data element classification cl...	4 PHI	-	Jun 21, 2023, 5:17 AM	Sohan Dhanuka	
<input type="checkbox"/>	Atlantis Passport	Data Element	This data element classification cl...	1 LOW	-	May 8, 2025, 1:37 AM	Colin Craig	
<input type="checkbox"/>	Australia Bank Account Number	Data Element	This data element classification cl...	4 PHI	-	Jun 21, 2023, 5:25 AM	Sohan Dhanuka	
<input type="checkbox"/>	Australia Passport	Data Element	This data element classification cl...	4 PHI	PHI +2	Sep 24, 2025, 4:59 AM	Sreedhar Panduri	
<input type="checkbox"/>	Australian Business Number	Data Element	This data element classification cl...	1 LOW	-	Jun 21, 2023, 5:14 AM	Sohan Dhanuka	

1 - 25 of 375 Items Page 1 of 15 Items Per Page: 25

Edit

Clone

Delete

Create Rules Tailored to Your Organisation

Australia Passport_Clone < Back Next > Save Clone 🗑️ ✕

✓ General Information 2 Qualifier

Inclusion Rule Validate

Advanced ⓘ You cannot toggle to Basic mode because you typed the expression in Advanced mode. ↶ ↷ ↺

Attributes ↕

Double-click the attributes or hover on the row to click the arrow and select.

Name ↑	Data Type
▼ Metadata	
COLUMN_COMMENT	String
NAME	String
PARENT_COMMENT	String
PARENT_NAME	String
▼ Statistics	
AVERAGE	Numeric
FREQUENT_VALUES	Array
INFERRED_DATATYPE	String
MAX_VALUE	String
MIN_VALUE	String
NULL_PERCENTAGE	Numeric
NUM_PROFILED_VALUES	Numeric
STANDARD_DEVIATION	Numeric
> VALUE_FREQUENCIES	Array(struct)

Select an item from the options on the left to see the description.
Enter your expression in the editor. For example: NAME LIKE "%Credit Card%" AND forall (FREQUENT_VALUES, v -> v RLIKE "^4[0-9]12(?:[0-9]3)?8\$")
To see the list of suggestions in the editor, press Ctrl+Space.

```
(lower(name) like 'aus%' or lower(name) like '%passport' or lower(name) like '%aus%' or lower(name) like '%pspt%' or lower(name) like 'passport%' or lower(name) like 'travel' or lower(name) like '%permit%' or lower(name) like '%foreign%' OR lower(name) like '%tax%') AND (size(filter(FREQUENT_VALUES, v -> REGEXP_REPLACE(v, '[ ]', ',')) RLIKE '^[A-Z]{1}[0-9]{7}$'))/size(FREQUENT_VALUES) >= 0.8f)
```

Grid Management

Grid Settings

Individual Users Can Design and Save Their Preferred Grid Layouts

Social Media Marketing /

Subscriber Details

DATA SET

Overview **Contains** Lineage Relationships Data Quality Reference Data Stakeholders Tickets History

Data Elements (18)

Name ↑	Business Name	Type	Glossaries	Classifications	Classification Categories
<input type="checkbox"/> C_BIRTH_COUNTRY		Column		Birth date +1	
<input type="checkbox"/> C_BIRTH_DAY		Column		Birth date	
<input type="checkbox"/> C_BIRTH_MONTH		Column		Birth date	
<input type="checkbox"/> C_BIRTH_YEAR		Column		Birth date	
<input type="checkbox"/> C_CURRENT_ADDR_SK		Column			
<input type="checkbox"/> C_CURRENT_CDEMO_SK		Column			
<input type="checkbox"/> C_CURRENT_HDEMO_SK		Column			
<input type="checkbox"/> C_CUSTOMER_ID		Column			
<input type="checkbox"/> C_CUSTOMER_SK		Column			
<input type="checkbox"/> C_EMAIL_ADDRESS		Column		Email	
<input type="checkbox"/> C_FIRST_NAME		Column		First Name	
<input type="checkbox"/> C_FIRST_SALES_DATE_SK		Column			

Find

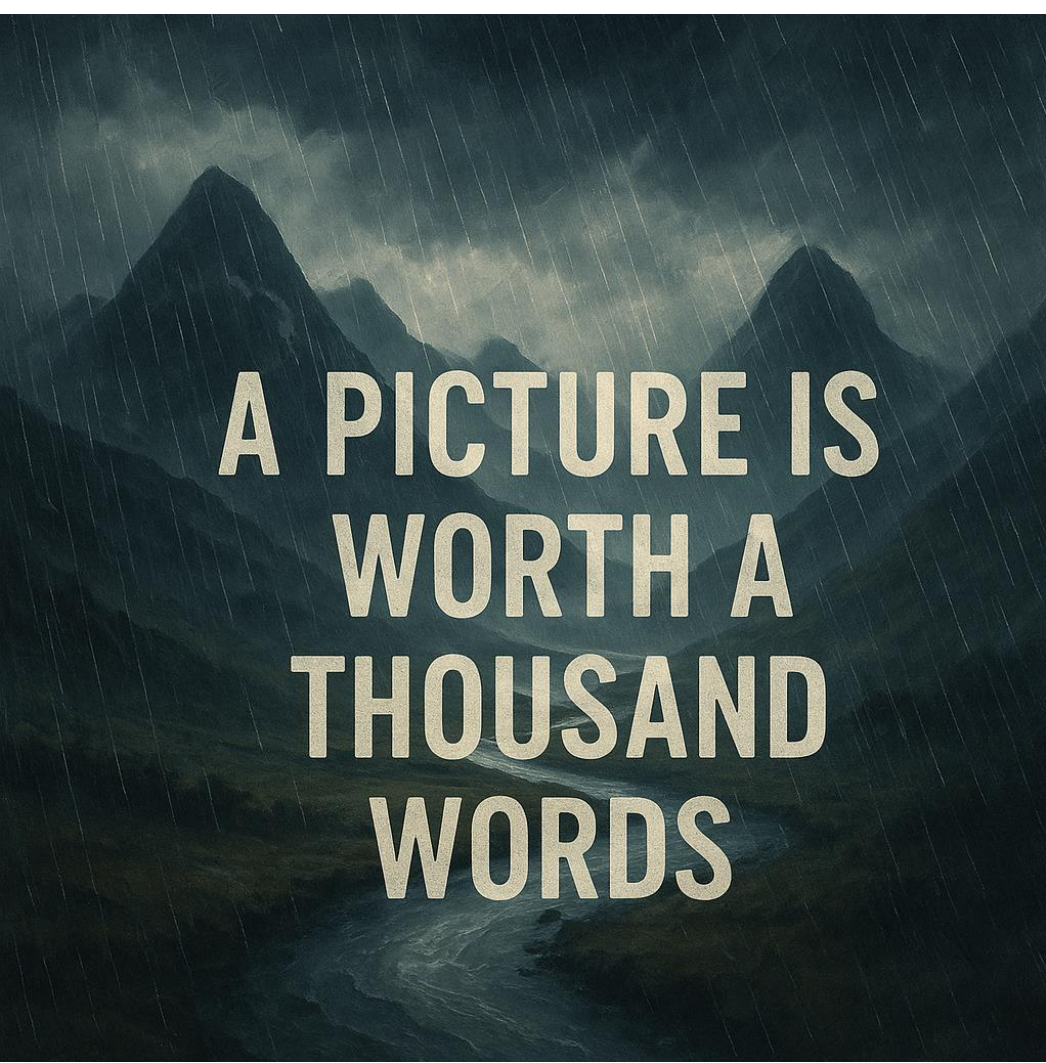
- ✓ Name
- ✓ Business Name
- ✓ Classification Categories
- ✓ Classifications
- ✓ Description
- ✓ Glossaries
- ✓ Hierarchy
- ✓ kriv
- ✓ New Test Attribute
- ✓ Secondary Name1
- ✓ Sensitivity

Show Defaults

Choose Columns to Display >

- Columns >
- Save Layout ⓘ
- Reset Layout >
- Layout Settings >
- Grid Settings

Saved Search to Custom Dashboards

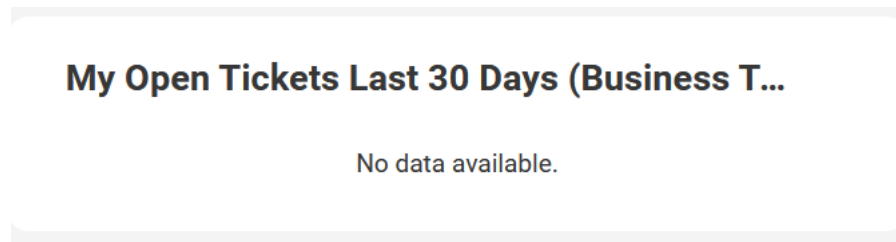
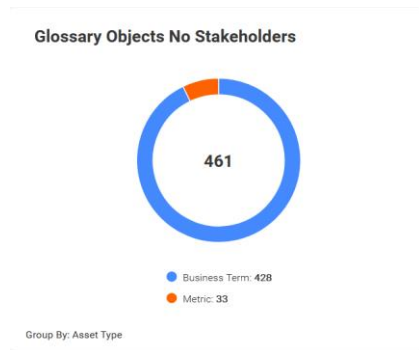


**A PICTURE IS
WORTH A
THOUSAND
WORDS**

- Consume more information on one page
- Excellent way to engage a new community you wish to onboard
 - Prepare something that presents their key interests / concerns

If you can search for something....

- You can save that search...
- ...if you can save a search, you can make a widget out of it...
- ...if you have a collection of widgets, you can create a dashboard with them...



Help for Getting Started

[Search & Browse for Assets](#)

[Create Assets](#)

[Workflows & Tickets](#)

[Understanding Business Assets](#)

[Understanding Technical Assets](#)

[Data Lineage](#)

[Bulk Import Business Assets](#)

Dashboards

Choose your own default from available dashboards

The screenshot displays the Informatica dashboard interface. A dropdown menu is open for the 'CDO Office Dashboard', showing a list of available dashboards. The dashboard content includes several widgets: 'Business Assets' with counts for Data Set (755), Process (324), Project (130), Subdomain (119), System (108), Metric (105), and Business Area (73); 'My Dashboards (2)' with 'Default Dashboard' and 'New CDGC Dashboard with Data Access...'; 'Usage Analytics Dashboards (2)' with 'User Adoption Dashboard' and 'Asset Dashboard'; 'Shared Dashboards (6)' with 'Asset Count Dashboard' and 'Data Owner Dashboard'; 'CLAIRE Activity' showing 424.9K ASSETS WITH RECOMMENDATIONS; 'Business Activity No Stakeholder' showing 185 items (Policy: 96, Process: 89); 'Business Term by CDE' showing 23.08% (Yes: 159); 'Systems and Policies' showing 275 Policy and 108 System; and 'Elements with ROs'. A 'My Jobs' widget shows 0 RUNNING jobs. A right-hand menu is open, listing actions for the current dashboard.

CDO Office Dashboard ▾

- Find
- CDO Office Dashboard *Default*
- My Dashboards (2)
 - Default Dashboard
Contains links to good examples
 - New CDGC Dashboard with Data Access ...
- Usage Analytics Dashboards (2)
 - User Adoption Dashboard
This dashboard shows you analytics of user inter...
 - Asset Dashboard
This dashboard provides insights into asset usa...
- Shared Dashboards (6)
 - Asset Count Dashboard
 - Data Owner Dashboard
This dashboard aims to provide insights into you...

Business Assets

- 755 Data Set
- 324 Process
- 130 Project
- 119 Subdomain
- 108 System
- 105 Metric
- 73 Business Area

My Dashboards (2)

- Default Dashboard
- New CDGC Dashboard with Data Access ...

Usage Analytics Dashboards (2)

- User Adoption Dashboard
- Asset Dashboard

Shared Dashboards (6)

- Asset Count Dashboard
- Data Owner Dashboard

CLAIRE Activity
powered by CLAIRE™

424.9K
ASSETS WITH RECOMMENDATIONS

RECOMMENDATION TYPE

RECOMMENDATION STATUS

Business Activity No Stakeholder

185

Policy: 96
Process: 89

Group By: Asset Type

Business Term by CDE

23.08%

Yes: 159

Systems and Policies

275 Policy
108 System

Elements with ROs

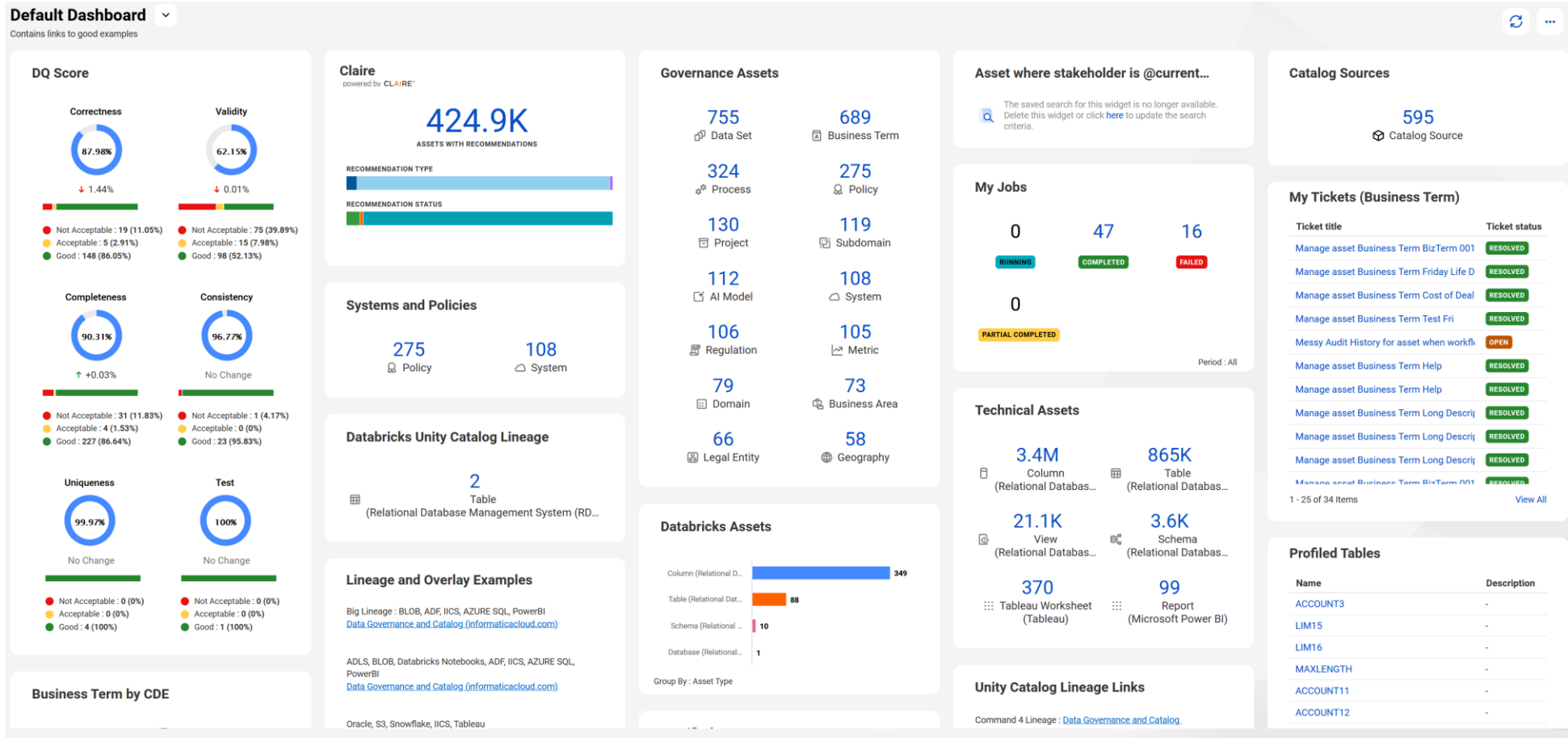
My Jobs

0
RUNNING

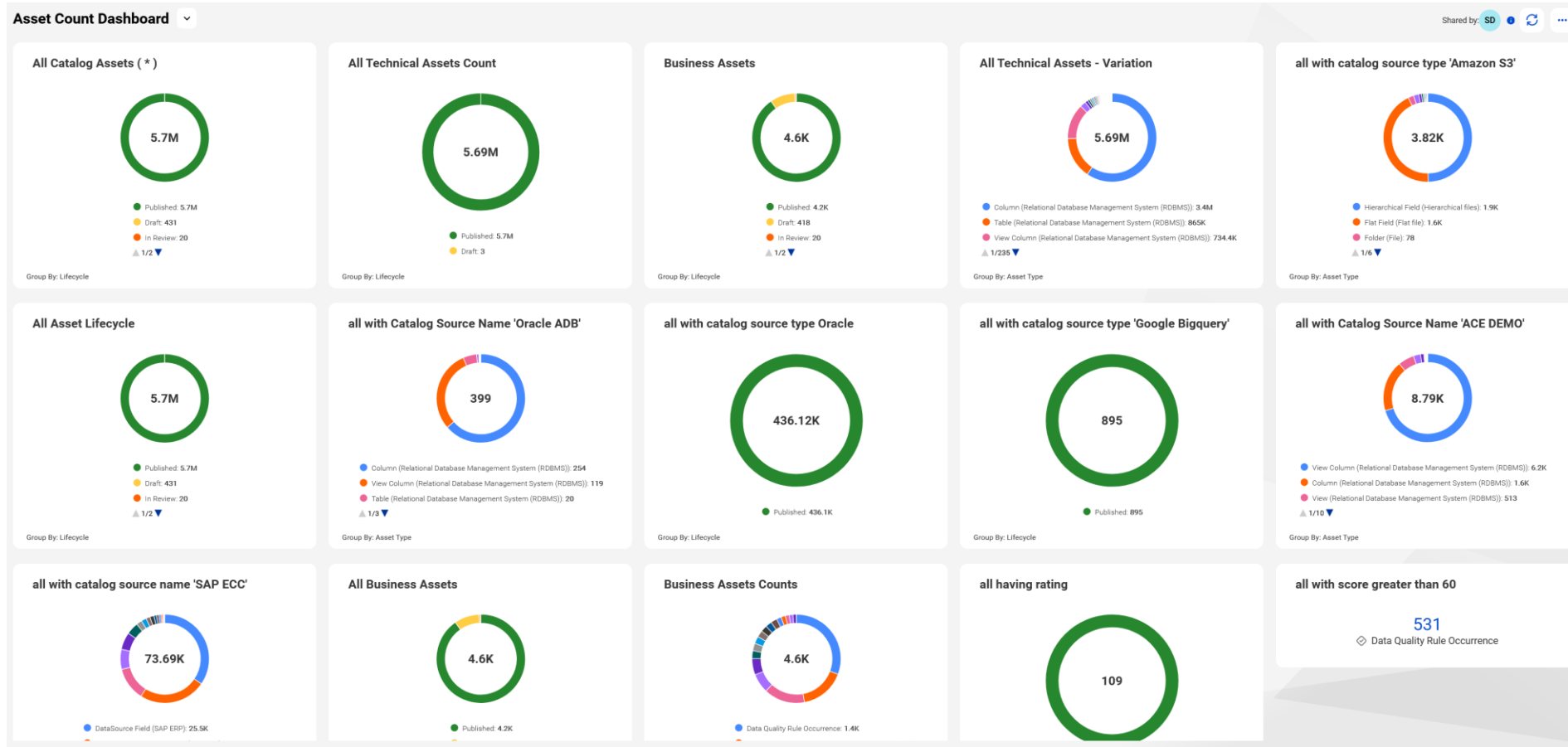
Current Dashboard

- New Widget >
- Reorder Widgets
- Edit Dashboard
- Delete Dashboard
- Manage Sharing
- Manage Dashboard
- New Dashboard
- Clone this Dashboard
- Manage Dashboards

Dashboard Examples



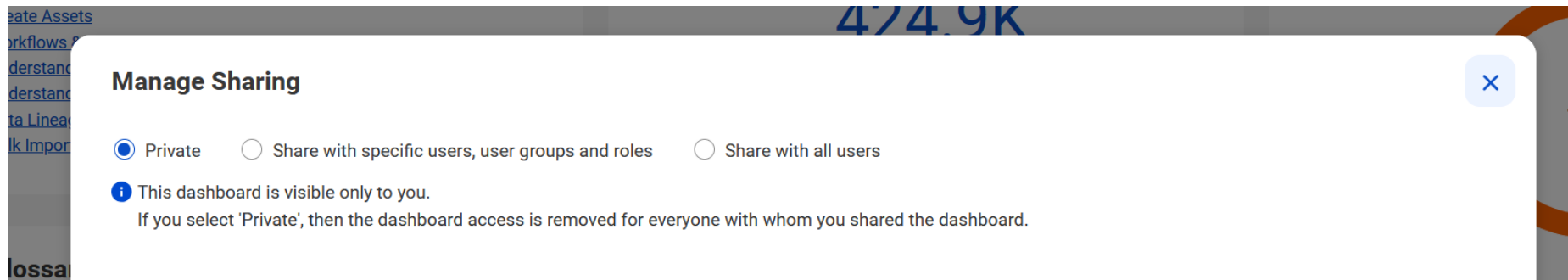
Dashboard Examples



If you can search for something....

- You can save that search...
 - You can also share that search to help your colleagues
- ...if you can save a search, you can make a widget out of it...
- ...if you have a collection of widgets, you can create a dashboard with them...

- Share dashboards (& dashboard management)



Saved Searches, Widgets & Dashboards

- Saved Searches are useful in their own right
 - Repeatable
 - Shareable
- Widgets
 - Multiple visual styles to make attractive dashboards
 - Don't have to be search based
- Dashboards
 - Make complex information easier to understand

Metadata Access Control

OOTB, CDGC has 3 roles

- Governance Administrator
- Governance Owner
 - New role (2025), primarily to manage assets, assume stakeholder roles etc.
 - (Without all the Admin privileges)
- Governance User
 - Read-Only user
 - Can see all technical and business assets

Those Roles Can Get You Started

- ...but you probably need more
- They probably don't match the personas you have identified or your Governance program
 - Data Steward
 - Data Scientist
 - Catalog users vs Business users?

Metadata Access Control

- Deny by default
 - There are no “exclude” policies
- MAC policies permit users/groups/roles/stakeholders to do..
 - (Without the OOTB policies, nobody could do anything)
- Policies are written at generic Asset Type Level
 - Technical.. (Or at specific technologies Snowflake, Databricks)
 - Business Assets
- Control over Specific Assets = Asset Groups

CDGC is a Metadata Tool

Can all users have Read access to *all* Catalog Sources?

- Analysts / Data Scientists are always looking for the right data for the next project – how can we help them?
- Technical data can hold more sensitive information that can only be viewed by users with a legitimate business need.
- MAC gives you the flexibility to control access to assets (and some attributes)

Technical Asset – Available Information

The screenshot displays the Informatica Data Governance and Catalog interface for a technical asset named 'Full Name'. The breadcrumb path is Snowflake Warehouse / CLOUDDGC / DGC_SCHEMA / AUSTRALIA_USERS. The asset is categorized as 'MEDIUM' sensitivity and 'PUBLISHED' lifecycle, last updated on Nov 26, 2025, at 9:08 AM. The 'Overview' tab is active, showing a description of 'Full Name', a technical description, and various classification and observability sections. The 'Inferred Data Types' section shows 'String (23)' with 1K rows (100%). The 'Pattern' section shows 'Others' with 886 rows, and two patterns 'XXXXXX XXXXXX' and 'XXXXXXXX XXXXXXXX' each with 57 rows. The 'System Attributes' section shows 'Data type: VARCHAR' and 'Data type Length: 200'. A table of 'Open Data Observability Events' is overlaid on the right side of the interface.

Value	Frequency	Percentage
Abbi Condie	1	0.1%
Addie Feckey	1	0.1%
Adela Houdhury	1	0.1%
Adelbert Dugood	1	0.1%
Adlai Owttrim	1	0.1%
Adria Hacon	1	0.1%
Afton McKechnie	1	0.1%
Aggi Jales	1	0.1%
Agnes Castelletto	1	0.1%
Agnes Hallihane	1	0.1%
Aila Smewin	1	0.1%
Ailsun Mossop	1	0.1%
Ainslee McLardie	1	0.1%
Alain Brandenburg	1	0.1%
Alexi Easum	1	0.1%
Alexis Antliff	1	0.1%
Alina Romer	1	0.1%
Alla Brewis	1	0.1%

Catalog User 1: Limited Access

Full Name

COLUMN FULLNAME

LIFECYCLE
PUBLISHED

LAST UPDATED
Nov 26, 2025, 9:08 AM

- Overview
- Lineage
- Relationships
- Data Quality
- Data Observability
- Stakeholders
- Attributes
- Tickets
- History

Description

Full Name

Technical Description

-

Glossaries (1)

Full Name (98...)

Data Element Classifications (0)

No associated Classification assets.

Classification Categories

No categories defined.

System Attributes (27)

Data type:

VARCHAR

Data type Length:

200

Data type Scale:

-

Nullable:

false

[View All](#)

Stakeholders

There are no stakeholders assigned to this asset.

Data Quality

There are no data quality scores to show.

Open Data Observability Events

Nothing to display

Associated Business Data Sets

No data to display

Generated Classifications

powered by CLAIRE™

No data to display

Snowflake Tags

SEC_CLASS: PII

INFA_COLUMN_CLASSIFIC...

Status

Catalog User 2: Read Classifications

Full Name

COLUMN FULLNAME

SENSITIVITY: MEDIUM | LIFECYCLE: PUBLISHED | LAST UPDATED: Nov 26, 2025, 9:08 AM

- Overview
- Lineage
- Relationships
- Data Quality
- Data Observability
- Stakeholders
- Attributes
- Tickets
- History

Description

Full Name

Technical Description

-

Glossaries (1)

Full Name (98...)

Data Element Classifications (1)

First Name

Classification Categories

No categories defined.

System Attributes (27)

Data type:

VARCHAR

Data type Length:

200

Data type Scale:

-

Nullable:

false

[View All](#)

Stakeholders

There are no stakeholders assigned to this asset.

Data Quality

There are no data quality scores to show.

Open Data Observability Events

Nothing to display

Associated Business Data Sets

No data to display

Generated Classifications

powered by CLAIRES

No data to display

Snowflake Tags

INFA_COLUMN_CLASSIFIC... | SEC_CLASS: PII

Status

Catalog User 3: Basic Profiling (Signatures)

Full Name

COLUMN FULLNAME

SENSITIVITY: MEDIUM
LIFECYCLE: PUBLISHED
LAST UPDATED: Nov 26, 2025, 9:08 AM

- Overview
- Lineage
- Relationships
- Data Quality
- Data Observability
- Stakeholders
- Attributes
- Tickets
- History

Description

Full Name

Stakeholders

There are no stakeholders assigned to this asset.

Technical Description

-

Data Quality

There are no data quality scores to show.

Glossaries (1)

- Full Name (98...)

Open Data Observability Events

Nothing to display

Data Element Classifications (1)

- First Name

Associated Business Data Sets

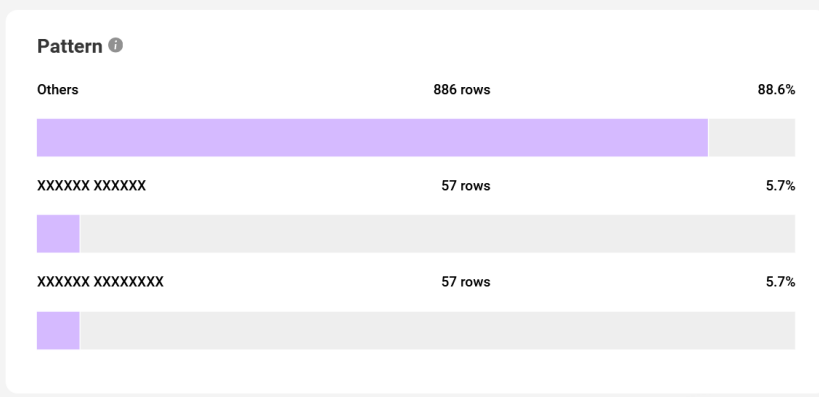
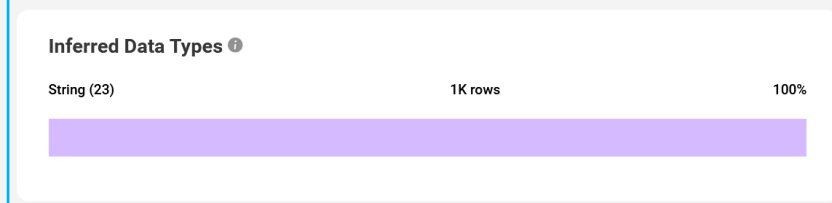
No data to display

Classification Categories

No categories defined.

Generated Classifications

powered by CLAIR
No data to display



Value Frequency

Total: 1K rows

- Null (0)
- Distinct (1K)
- Non-Distinct (0)

Snowflake Tags

Business User – Data Scientists / AI Governance

Read access to assets, full access to a limited set of assets

Data Sci UserRole Pol
USER ROLE POLICY - DATA SCIENTIST

LIFECYCLE: PUBLISHED | STATUS: ENabled | RULES: 2 | LAST UPDATED: Aug 29, 2025, 4:26 AM

Overview | Rules

Permissions

Is Any Of	Permissions
Business Asset, Business Data Element, Marketplace Asset, Marketplace Data Assets, Technical Asset	Read
AI Model, AI System, Data Set, System	Create, Delete, Manage Access, Read, Update

Asset Groups

Controlling Access to groups of objects

CDGC: What will Users see?

Users Will See Different # of Assets: This affects Shared Search/Dashboards

The image displays two screenshots of a dashboard interface, illustrating how asset counts change between different views or user roles. Both screenshots show a 'My Dashboard' with various widgets.

Top Screenshot:

- Business Assets:** 84 Policy, 61 Process, 58 Business Term, 14 Subdomain, 14 System, 7 Data Set, 4 Domain.
- Technical Assets:** 41 Catalog Source.

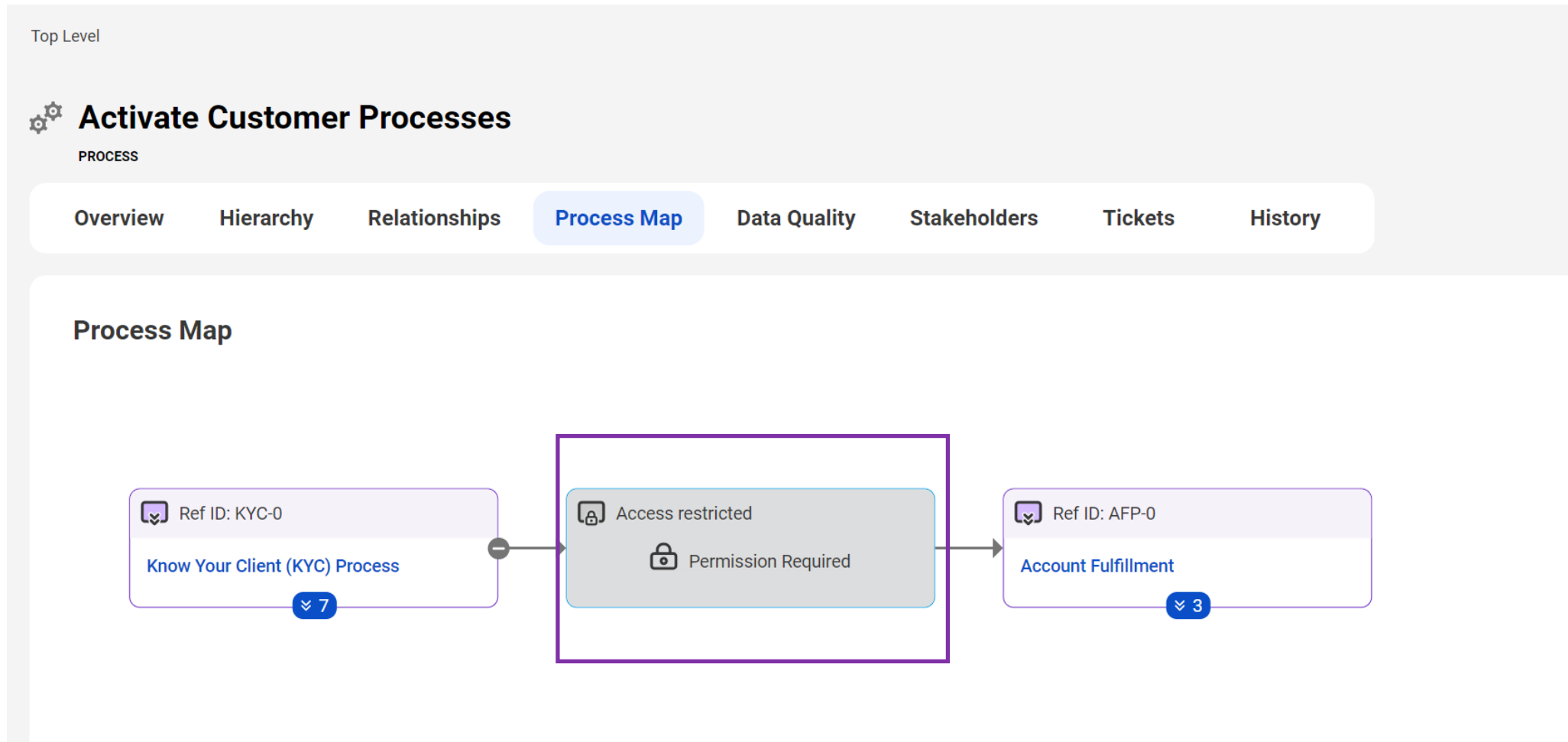
Bottom Screenshot:

- Business Assets:** 83 Policy, 59 Process, 58 Business Term, 14 Subdomain, 13 System, 7 Data Set, 4 Domain.
- Technical Assets:** 41 Catalog Source.

The difference in counts (84 vs 83 Policy, 61 vs 59 Process) is highlighted with orange boxes in both screenshots, indicating that the number of assets visible to users can vary.

CDGC: One user's experience

Maps will show full lineage.. with restrictions if necessary



New Panel on Asset Page (only appears when Asset Groups are configured)

The image displays two screenshots of a software interface for asset management, specifically focusing on the 'Asset Groups' section of two different processes.

Top Screenshot: Know Your Client (KYC) Process

- Process:** Know Your Client (KYC) Process
- Overview:** Description, Hierarchy, Relationships, Process Map, Data Quality, Stakeholders, Tickets, History
- Description:** Know Your Customer (KYC) refers to due diligence activities that financial institutions and other regulated companies (e.g. insurance companies law firms etc.) must perform to ascertain relevant information from their clients for the purpose of doing business with them.
- Attributes:** Parent: Activate Customer Processes; Reference ID: KYC-0; Process Type: Process
- Stakeholders:** There are no stakeholders assigned to this asset. Click here to add a stakeholder.
- Asset Groups (3):** Risk, Liquidity, Lending

Bottom Screenshot: Anti Money Laundering

- Process:** Anti Money Laundering
- Overview:** Description, Hierarchy, Relationships, Process Map, Data Quality, Stakeholders, Tickets, History
- Description:** Confirm suitability of new customer
- Attributes:** Parent: Activate Customer Processes; Reference ID: AML-0; Process Type: Process
- Stakeholders:** There are no stakeholders assigned to this asset. Click here to add a stakeholder.
- Asset Groups (1):** Lending

Arrows from the 'Asset Groups' lists in both screenshots point to external boxes:

- The KYC screenshot's 'Asset Groups (3)' list points to a box containing: Risk, Liquidity, Lending
- The AML screenshot's 'Asset Groups (1)' list points to a box containing: Lending

Feeling Inspired?

CDGC Feature Review

Are you aware of these? Do you use them already?

Customisation

- Attributes
- Relationships
- Asset Page
- Sensitivity & Classifications

User Community

- Saved Searches
- Widgets
- Dashboards
- Sharing Searches and Dashboards
- Grid Settings

Metadata Access Control

Roles and User Groups

- The right permissions for the right users

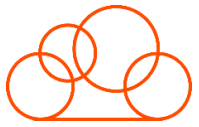
Asset Groups

- Control access to groups of assets

Q&A

Thanks for listening – over to you

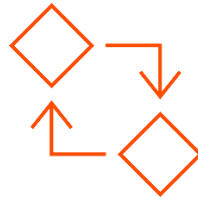
Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions



Informatica
Concierge



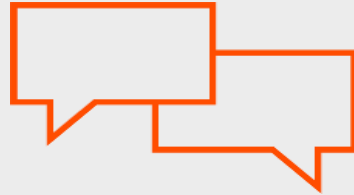
Tailored training and
content
recommendations

More Information



Success Portal

<https://success.informatica.com>



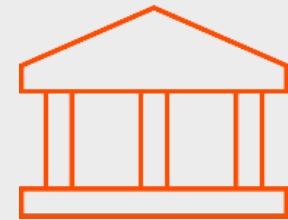
Communities & Support

<https://network.informatica.com>



Documentation

<https://docs.informatica.com>



University

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