



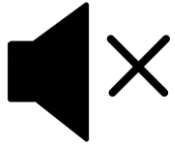
11 Mar, 2025

Deep Dive into New Workflow Functionality - Part of the April 2025 Release

- Pradeep GN, Principal Product Manager, R&D

Where data & AI come to **LIFE**

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.

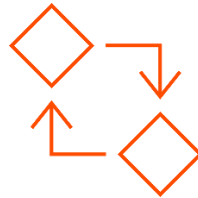
Feature Rich Success Portal



**Bootstrap trial and
POC Customers**



**Enriched Customer
Onboarding
experience**



**Product
Learning Paths
and Weekly
Expert Sessions**

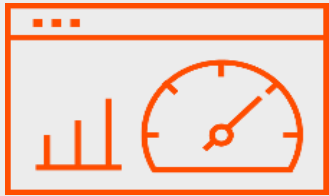


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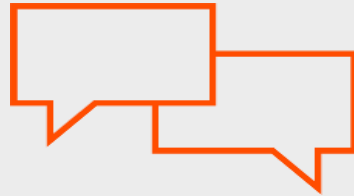
**Tailored training
and content
recommendations**

More Information



Success Portal

<https://success.informatica.com>



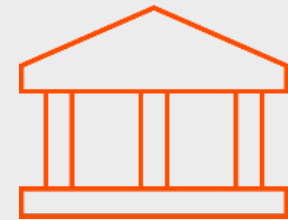
Communities & Support

<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 New Workflow Engine

2 Design and Configuring Workflows in MCC

3 Task Inbox in CDGC

4 Upgrade Impact

5 Demo

6 Q&A

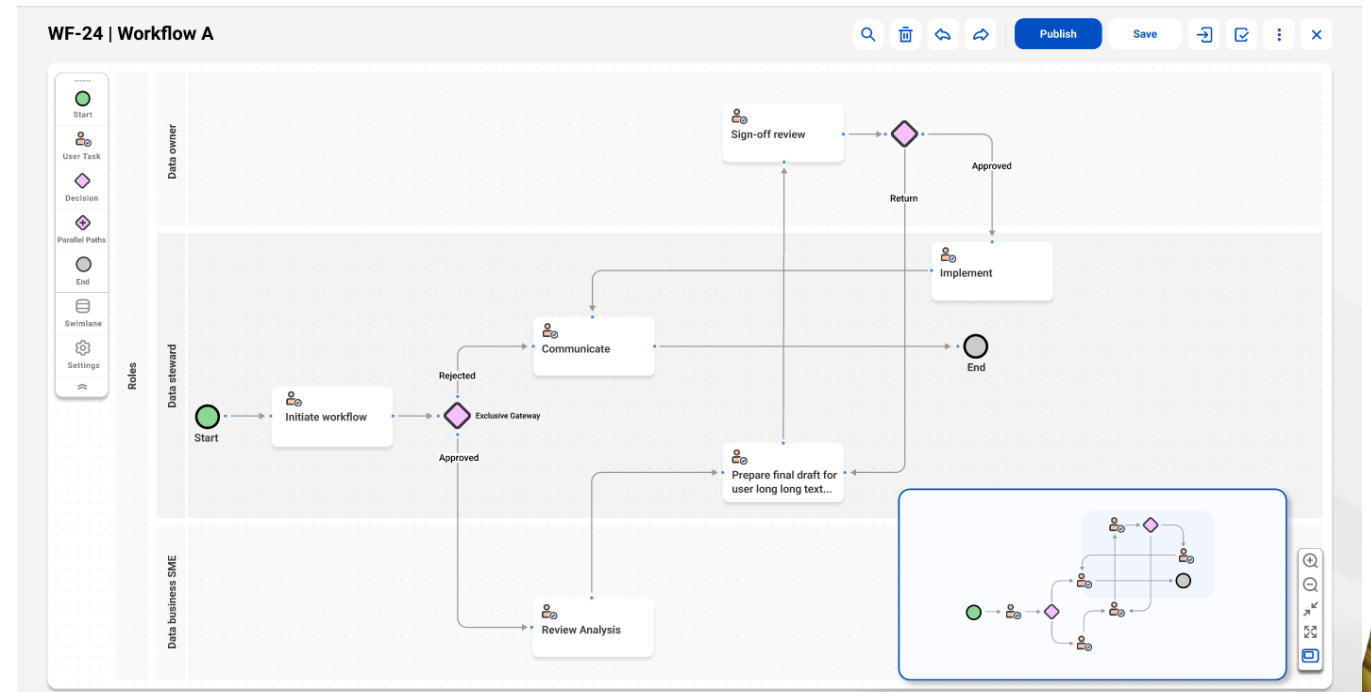


New Workflow Engine

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New Workflow Engine

- Utilizes Business Process Model and Notation (BPMN) for intuitive Workflow design and visualization.
- Customizable workflows for Business use cases
- Supports complex workflow designing with User tasks and Decision gateways
- User friendly UI based workflow designer with drag and drop capability to design workflows
- Provides real-time visibility into workflow progress.
- Scalable and Performance driven for enterprise use cases



Design and Configuring Workflows in MCC

New Workflow Design

- Design Workflows within MCC – Metadata Command center
- Designer canvas with Swimlanes
- Drag and drop components to design workflow
- Use context of the component to progress on the design of workflow
- Real time validations to prevent significant errors later.

The screenshot displays the Informatica Metadata Command Center interface for designing a workflow. The main canvas is divided into swimlanes: Owner, Steward, and Requirer. The workflow starts with a 'Start' node in the Steward swimlane, followed by an 'Analysis' task. A 'Decision' node follows, leading to 'Decision 1'. From 'Decision 1', the flow branches into 'Implement' and 'Discard' tasks. A 'User Task' component is also visible in the design. A 'Validations' panel on the right lists several errors:

- ✓ User Task | Analysis
 - ✗ Task outcomes are not defined for User Task.
- ✓ User Task | Decision
 - ✗ Task outcomes are not defined for User Task.
- ✓ Decision | Decision 1
 - ✗ Task outcomes are not defined for Decision.
 - ✗ The outcome selected in the outgoing connection does not match with possible task outcomes.
- ✓ User Task | Implement
 - ✗ No outgoing connection for User Task.
 - ✗ Task outcomes are not defined for User Task.
- ✓ → Connection | Connection
 - ✗ The outcome selected in the outgoing connection does not match with possible task outcomes.
- ✓ User Task | Discard
 - ✗ No outgoing connection for User Task.
 - ✗ Task outcomes are not defined for User Task.
- ✓ → Connection | Connection

Workflow Repository

- Manage workflows in MCC -> Explore
- Lifecycle to control the workflow usage
 - Draft
 - Published
 - Obsolete
- Show dependency to know the Events using the Workflow

The screenshot displays the Informatica Metadata Command Center interface. The top section shows the 'Explore' view with a navigation menu on the left and a search bar. The main content area displays a list of 44 workflows. The bottom section shows a modal window titled 'Workflow Events (8)' with a table of events.

Name	Type	Asset Type	Created By
Glossary Change	Approval Request for Change	Business Term, Domain, Subdomain	JamesAnderson
Policy Workflow Configuration	Approval Request for Change	Business Term, Domain, Subdomain	JamesAnderson
Business Area Approvals	Approval Request for Change	Business Term, Domain, Subdomain	JamesAnderson
Data Label Change	Approval Request for Change	Business Term, Domain, Subdomain	JamesAnderson
Term Modification	Approval Request for Change	Business Term, Domain, Subdomain	MichaelCarter
Metadata Adjustment	Approval Request for Change	Business Term, Domain, Subdomain	MichaelCarter
Taxonomy Update	Approval Request for Create	Business Term, Domain, Subdomain	MichaelCarter
Index Alteration	Approval Request for Create	Business Term, Domain, Subdomain	MichaelCarter

Workflow configuration for Events

- Events can be enabled or disabled
- For any asset type and event type, there can be only one enabled Event
- Will be able to use BPMN based published workflows only
- Components within the workflow cannot be moved
- Each task and Outcome can be configured for the Event type

The image displays three sequential screenshots of the Informatica Metadata Command Center interface, illustrating the workflow configuration process for events.

Top Screenshot: Shows the 'Configure' page for 'Events (7)'. The 'Workflows' tab is selected, and a 'Select a Workflow' dialog box is open, allowing users to browse for a workflow.

Middle Screenshot: Shows the 'Glossary Change' page with the 'Workflow' tab selected. A workflow named 'Workflow ABC' is chosen, and the BPMN diagram is visible. The workflow starts with a 'Start' event for 'Policy SME' and includes tasks like 'Validate Policy Readiness for Data Discovery', 'Describe Discovery Coverage', and 'Authorize Data Discovery Execution'.

Bottom Screenshot: Shows the 'User Task' configuration panel for the 'Validate Policy Readiness for Data Discovery' task. The task name is 'Validate Policy Readiness for Data Discovery' (ID: 44/120). The description is 'Validate that request is suitable. Perform any appropriate checks: data set definition, attributes described, stakeholders added etc.' (ID: 134/400). The task priority is set to 'High', and the due in days is '80'. The follow-up days are '2', and the lifecycle of the asset is 'In Review'. The task is locked to the object.

Task Inbox in CDGC

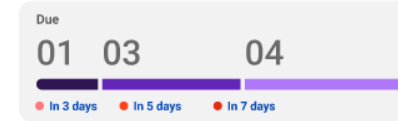
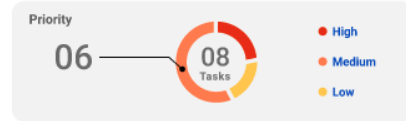
Task Inbox

User Task Inbox New Workflow Inbox

CDGC

Tasks Assigned to me (8) Unassigned Tasks (20)

Overview



Tasks (8)

<input type="checkbox"/>	Tasks	Type	Due Date	Status
<input type="checkbox"/>	Step One Approval For Customer1	Approval	DD MM YYYY	In-progress
<input type="checkbox"/>	Task	Create	DD MM YYYY	Overdue
<input type="checkbox"/>	Task is a very long name This is a very long name This very long na...	DQ	DD MM YYYY	In-progress
<input type="checkbox"/>	Task	DO	DD MM YYYY	Not Started
<input type="checkbox"/>	Task	Approval	DD MM YYYY	Not Started
<input type="checkbox"/>	Task	Approval	DD MM YYYY	Not Started
<input type="checkbox"/>	Task	Create	DD MM YYYY	Not Started
<input type="checkbox"/>	Task	Create	DD MM YYYY	Not Started

Step One Approval For Customer1

Description
Review the changes and take necessary action.
[View Ticket](#)

Changes Asset Task Details Ticket Details Comments (3)

Asset Changes (2)

Field	Original Value	New Value
Sync With Template	Yes	No
Reference ID	Auto-04c764d1-sh8447ee-ae21-5f512190fe...	Auto-04c764d1-0b56-47ee-ae21-5f512190fe2e...

Collapse

Visual representation of Workflow Progress

Step One Approval For Customer1 Approve Reject 🔗

Review the changes and take necessary action.

- Manage asset Data Quality Rule Occurrence Auto-postalcode-Accuracy-Postal Code Length check
- New Policy AB

Changes Asset Task **Ticket** Comments

Manage asset Data Quality Rule Occurrence Auto-postalcode-Accuracy-Postal Code
Description Lorem ipsum dolor sit amet, consetetur adipisicing elit, sed do eiusmod tempor incididunt.

General Information

Severity	Created On	Modified On	Urgency	Ticket Type
Medium	25/11/2024	26/11/2024	Minor	Approval request for Create

Resolution
No resolution recorded yet

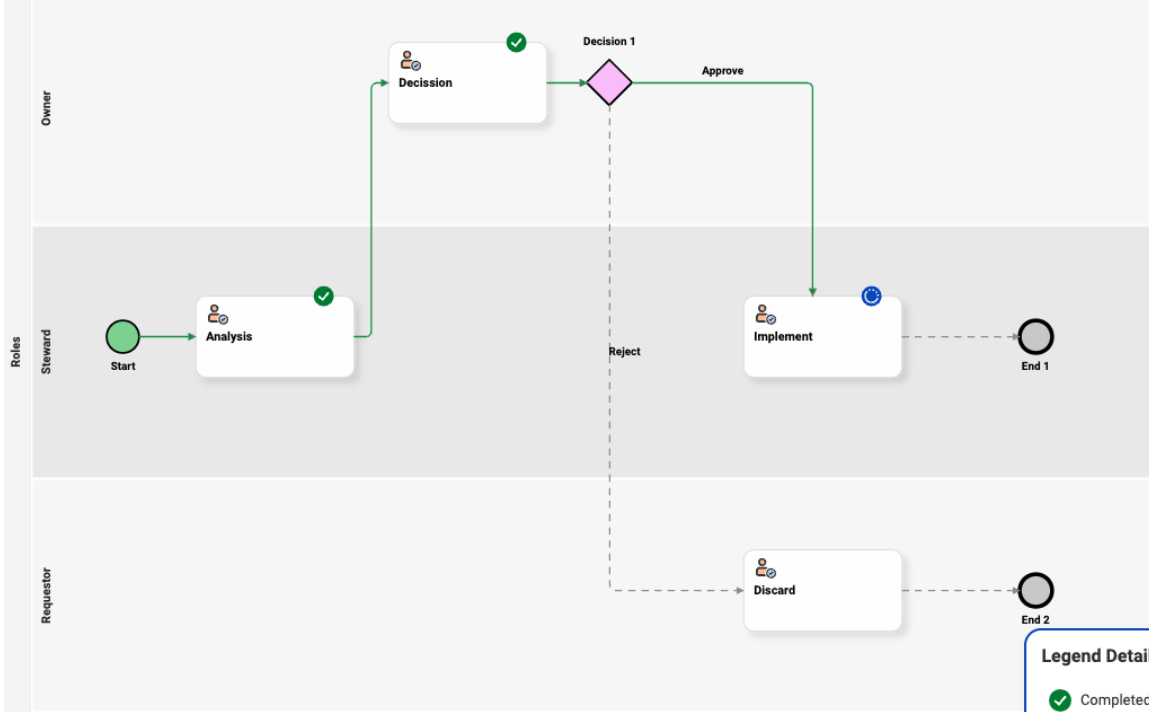
Stakeholders

Created By: Ketaki Karkhanis (Data Steward), Requested By: Pranav Singh (Governance Administrator)

Workflow

Previous Tasks

- Review change to see if it is viable**
 - Description not specified (Completed on 27-Dec-2024 07:17:05 as 'Viable' by John Admin)
- Review change to see if it is in line with Client Data Management best practices**
 - Description (Completed on 26-Dec-2024 05:17:05 as 'In line' by Pranav Singh)
- Confirm process change**
 - Description (Completed on 24-Dec-2024 02:17:05 as 'Approved' by Katrina Apollgate)



Legend Details ✕

- ✓ Completed Task
- 🕒 Overdue Task
- 🕒 In-Progress Task
- ➡ Flow Complete
- ➡ Flow Not Started

Upgrade Impact

Transitioning to New Workflows

April Upgrade



New Event Configuration



Existing Event Configuration



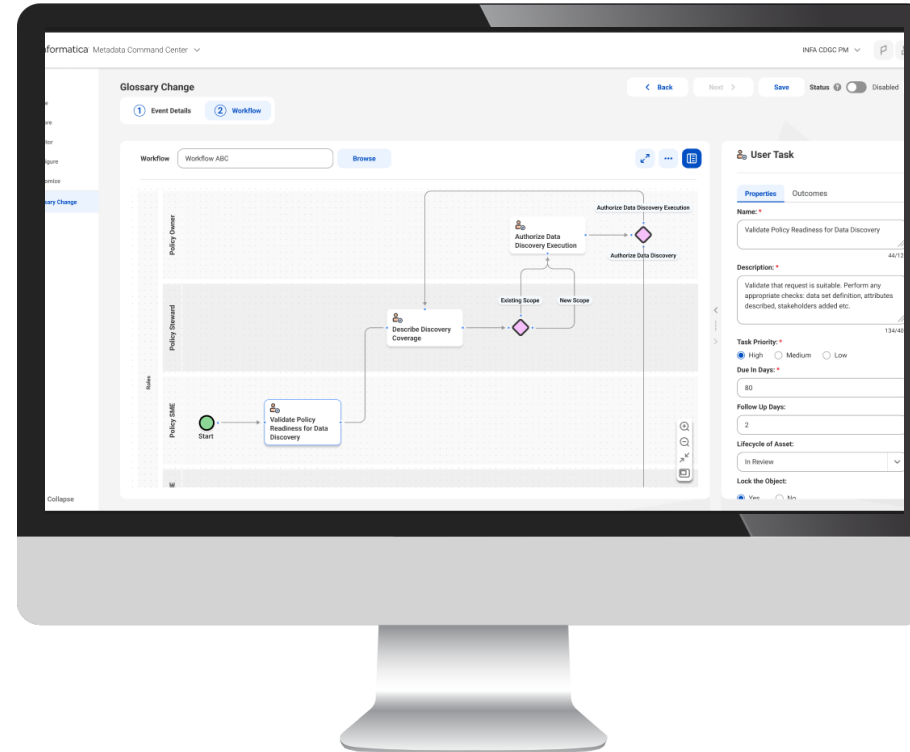
Task Inbox

Next Major Upgrade



- All New Workflow design will be BPMN based
- Out of the Box – One, Two and Three Step approval workflows will be available
- Custom workflows need to be designed in New Workflow canvas
- Only BPMN based Workflows will be allowed for configuration
- No CAI Processes listed for configuration in events
- Events with CAI Processes continue as-is until next major release
- Will not be allowed to change associated CAI Processes
- Tickets will be created until the next major release
- Human Task Inbox (for CAI Human Task) and Task Inbox (for New Workflows) will co-exist with an option to switch appropriately and complete tasks
- CAI Human Tasks will have message to complete before the next upgrade
- All open Tickets based on CAI Processes must be completed or cancelled

DEMO



Questions ?

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