

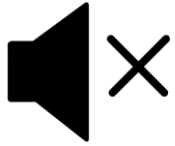
17 Dec, 2024

# Metadata Access Control in Cloud Data Governance and Catalog (CDGC) in November 2024 Release

- Louis Noel Trapadoux, Director, Product Management, R&D
- Colin Craig, Senior Principal Product Manager, Product Management, R&D

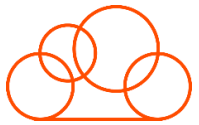
Where data & AI come to 

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- 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.

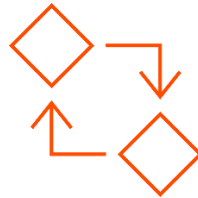
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**Bootstrap trial and  
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**Enriched Customer  
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**Product  
Learning Paths  
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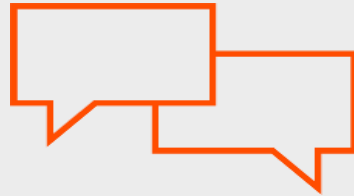
**Tailored training  
and content  
recommendations**

# More Information



## Success Portal

<https://success.informatica.com>



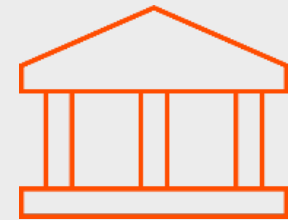
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## Documentation

<https://docs.informatica.com>



## University

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

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# Agenda

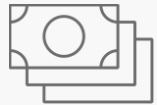
- Introduction to Metadata Access Control (a.k.a. MAC)
- Demo
- Asset group
- Q&A

# Metadata Access Control



## Key Highlights

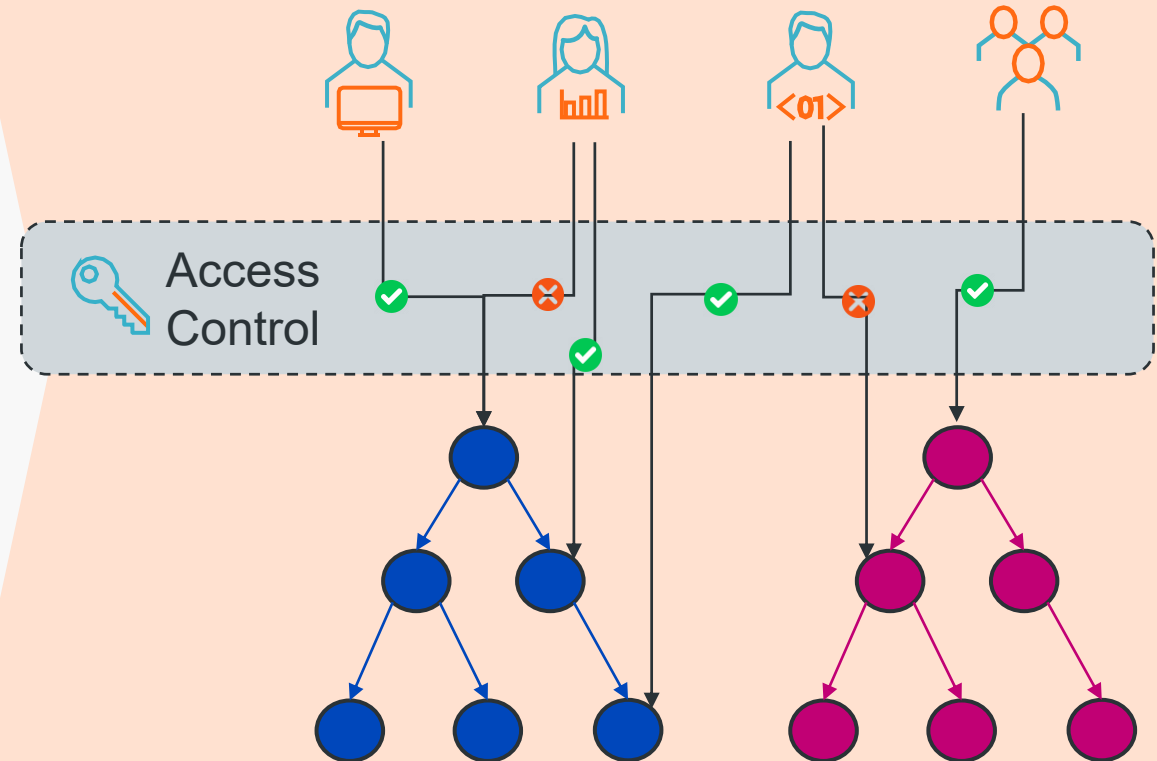
- **Easy and efficient metadata access control** extending IDMC user roles definition
- **Attribute value driven metadata access control** for all asset at any level of the hierarchies
- **Granular metadata access control** for any asset of the metadata platform via asset specific roles (stakeholders) definition



## Benefits

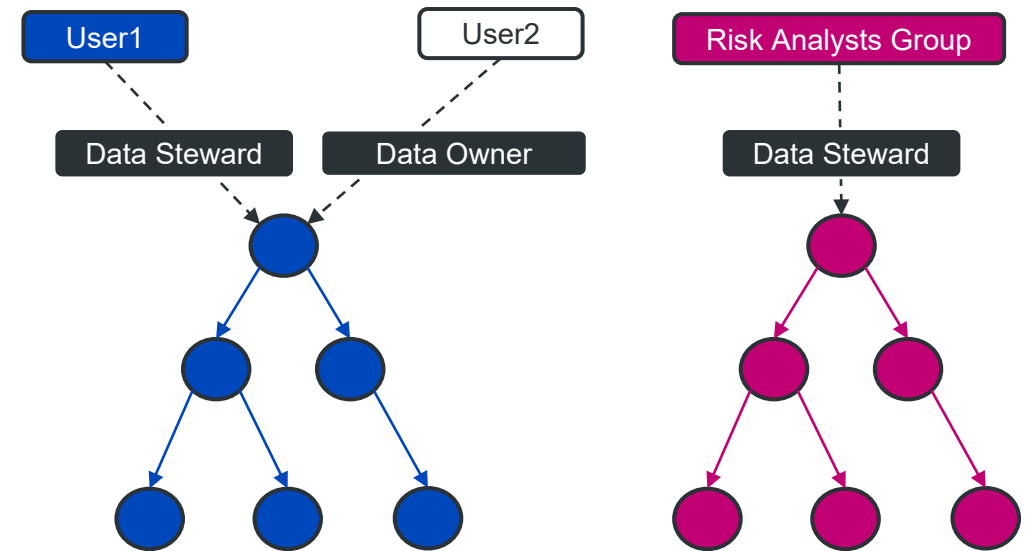
- **Provide full control** to customers to control access to dataset information at an enterprise level
- **Allow customers to catalog the entire data landscape** securely and manage asset ownership at scale
- **Allow customers to open consuming application (CDGC, CDM, CLAIRE GPT)** to their entire organization

## Metadata Access Control



# Enhanced control of permissions based on roles

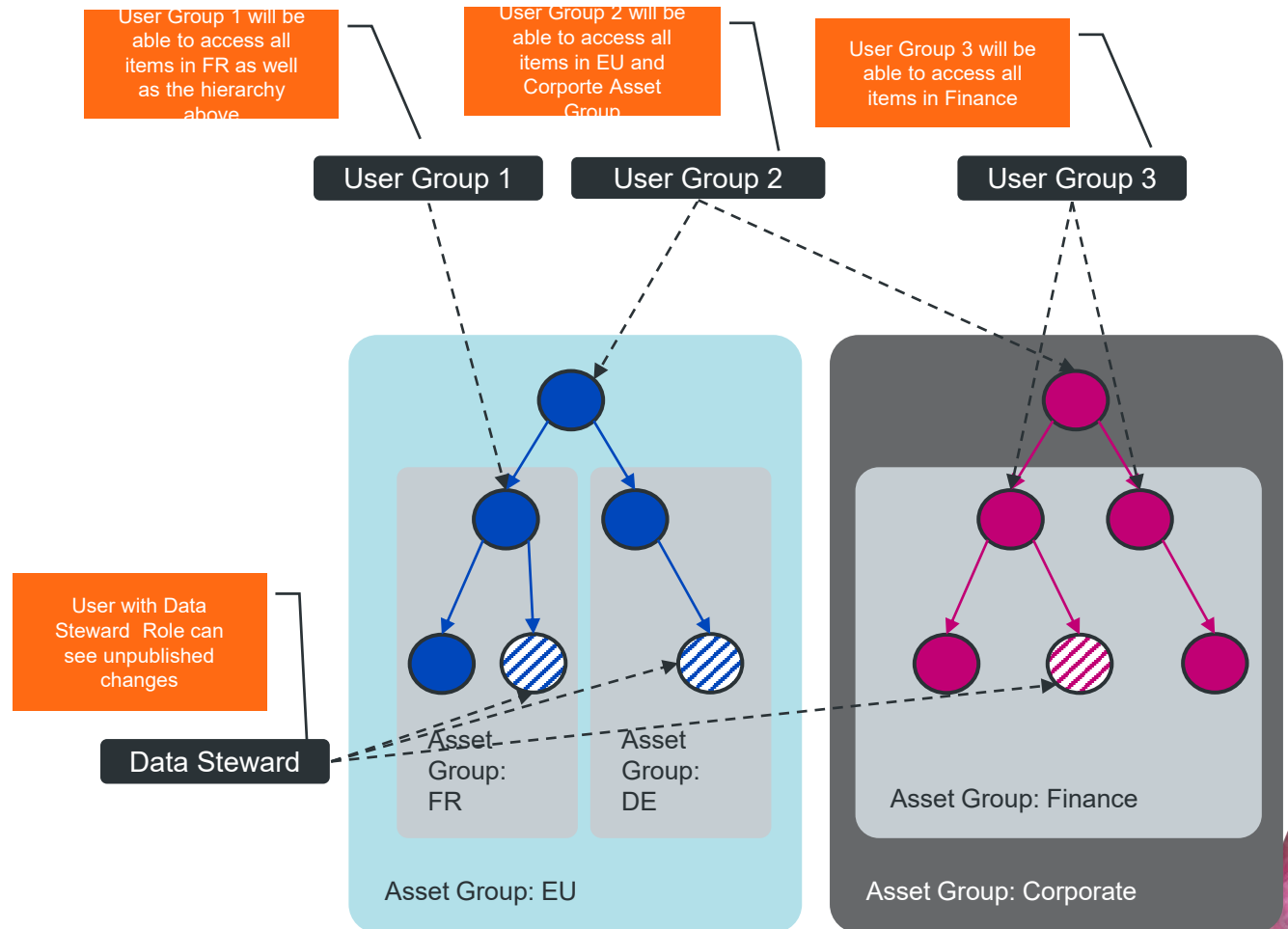
- **User roles** grants access to asset types based on their roles.
  - Permissions can be granted at the abstract types level (Business assets, marketplace assets, and technical assets).
  - Permissions can be granted at individual type level
  - Technical assets: Different access controls can be defined for the same class type based on **catalog source type**.
- **Stakeholder roles** are used to control who gets to edit or make changes to an asset.
  - Presence of a stakeholder on an asset activates non-stakeholder policies to grant permission to other users.
  - In case of Tech Asset, Stakeholder assignment are inherited from parent asset unless overridden.





# Control permissions on assets based on attribute

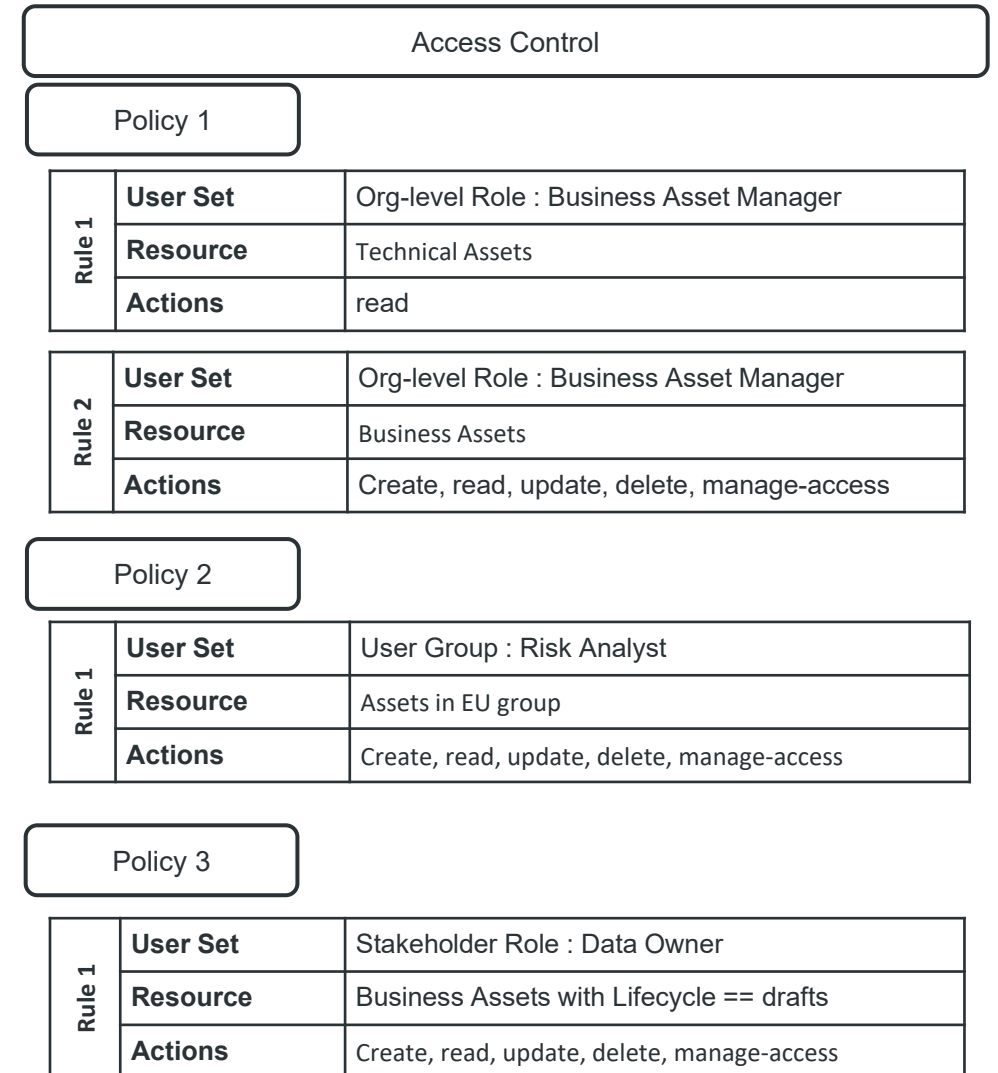
- Access to assets can be restricted based on attribute value of specific attribute
  - **Lifecycle:** Visibility based on Lifecycle values
    - For published asset, access to ongoing changes can be restricted as well
  - **Reference:** to reduce the scope permissions on technical assets
  - **Asset Group:** Parameters on an Asset that drives visibility of the asset for the user
- Permission on specific information on the Asset with attribute groups:
  - **Profiling:** base profiling statistics
  - **Data:** Value frequencies, Min/Max values
  - **Code:** Code definition (SQL, Calculation expressions...)
  - **unpublished changes:** Changes made to an asset published at least once



# Access control policies

## Collection of Rules

- Policy contains rules which grant permissions to users through
  - User roles
  - User groups
  - Or role performed on an asset (stakeholder roles)
- Scope based on
  - Assets filtered by type
  - Assets filtered based on attributes
  - Attribute groups
- Effective permissions are determined by the intersection of all applicable policies
- Once a user or stakeholder role policy with asset group filter is enabled, visibility of asset is effectively enforced and read permission must be granted for asset to be accessed

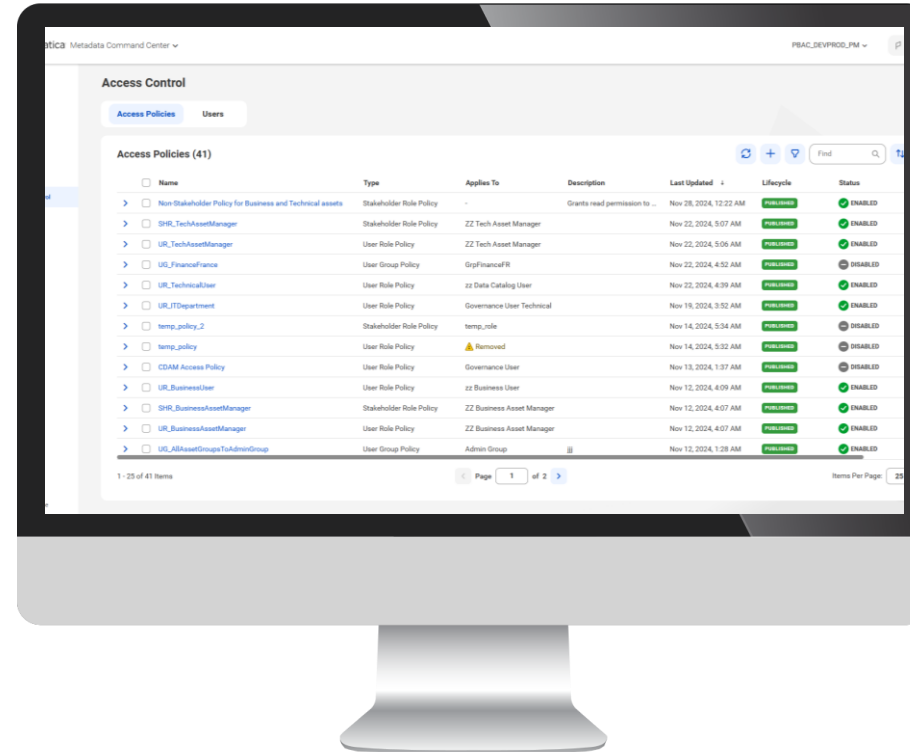


# Metadata Access control

## Out-Of-The-Box definitions

- CDGC Predefined Roles
  - **Governance Administrator:** can access MCC and CDGC and has most of the privileges
  - **Governance Owner (new):** can access CDGC without admin privileges
  - **Governance User:** can access CDGC and has limited privileges
- Stakeholder Roles
  - By default, Governance Administrator and Owner will be configured as stakeholder role
  - Any IICS role (Predefined or custom) can be configured as stakeholder role
- Predefined Policies
  - Can be cloned and disabled
  - Grants similar permissions as defined in Administrator through privileges
    - Governance Administrator and Owner have CRUD permission on assets
    - Governance User has read only permission on assets

# DEMO



# Demo scenario



## Technical Owner with tech asset and their attributes

- User with Tech Owner role should have ability to manage Technical assets
- User has read only access to published a subset of business assets and data classifications in order to curate tech assets
- User is allowed to see draft of tech assets but only published version of business assets



## Business user

- User with Business User role to have read only access published business asset



# Metadata Access Control Asset Groups

Where data & AI come to **LIFE**

# Asset Groups Control How Many Objects a User Sees

- So far, we have seen how to create policies that grant access to asset types
- We don't always want all users to see every single asset *of that type*
  - *Every Snowflake instance*
  - *Every schema*
  - *Every business data set*
- Asset Groups is an additional filter in MAC policies to give this control.

# CDGC: New Panel on Asset Page

(only appears when Asset Groups are configured)

Activate Customer Processes / Know Your Client (KYC) Process

OVERALL RATING: ☆☆☆☆ Add | LIFECYCLE: PUBLISHED | LAST UPDATED: Dec 2, 2024, 9:20 AM

Overview | 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

**Asset Groups (3)**

- Risk
- Liquidity
- Lending

Stakeholders: There are no stakeholders assigned to this asset. Click here to add a stakeholder.

**Risk**  
**Liquidity**  
**Lending**

Activate Customer Processes / Anti Money Laundering

OVERALL RATING: ☆☆☆☆ Add | LIFECYCLE: PUBLISHED | LAST UPDATED: Dec 2, 2024, 12:37 PM

Overview | 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

**Asset Groups (1)**

- Lending

Stakeholders: There are no stakeholders assigned to this asset. Click here to add a stakeholder.

**Lending**



# MCC: User Group Policy Example

Example: Different User Group Policies for Asset Group Access

## Access Control

Access Policies

Users

### Access Policies (49)

Refresh + Filter Find Search Sort

| <input type="checkbox"/>   | Name                       | Type                         | Applies To           | Description | Last Updated ↓        | Lifecycle  | Status    |
|----------------------------|----------------------------|------------------------------|----------------------|-------------|-----------------------|--|-----------|
| Condition                  |                            |                              |                      | Permission  |                       |  |           |
|                            | Asset Type<br>Asset Groups | Is Any Asset<br>Is Risk      |                      |             |                       | Create, Delete, Execute, Manage Access, Read, Update |           |
| ▼ <input type="checkbox"/> | GR-Liquidity               | User Group Policy            | Liquidity User Group |             | Dec 2, 2024, 12:13 PM | PUBLISHED  | ✓ ENABLED |
| Condition                  |                            |                              |                      | Permission  |                       |  |           |
|                            | Asset Type<br>Asset Groups | Is Any Asset<br>Is Liquidity |                      |             |                       | Create, Delete, Execute, Manage Access, Read, Update |           |
| ▼ <input type="checkbox"/> | GR-Lending                 | User Group Policy            | Lending user group   |             | Dec 2, 2024, 12:12 PM | PUBLISHED  | ✓ ENABLED |
| Condition                  |                            |                              |                      | Permission  |                       |  |           |
|                            | Asset Type<br>Asset Groups | Is Any Asset<br>Is Lending   |                      |             |                       | Create, Delete, Execute, Manage Access, Read, Update |           |

# Administrator: How did we create that view?

A tale of two users. Both are Governance Owners. Diff: User Group Policies

## User 1: Multiple Asset Groups

**Pbac\_pm\_fb**  
Define the user account settings, including group and role assignments.

**User Information**

**First Name:** Pbac\_pm\_fb  
**Last Name:** Pbac\_pm\_fb  
**Job Title:** PS  
**Phone Number:** 0625477741  
**Email:** ██████@informatica.com  
**Description:**

**Assigned User Groups and Roles**

| Enabled                             | Group Name                  | Description |
|-------------------------------------|-----------------------------|-------------|
| <input type="checkbox"/>            | Admin Group                 |             |
| <input type="checkbox"/>            | All User group              |             |
| <input type="checkbox"/>            | GrpFinanceFR                |             |
| <input type="checkbox"/>            | IT Department Group         |             |
| <input checked="" type="checkbox"/> | Lending user group          |             |
| <input checked="" type="checkbox"/> | Liquidity User Group        |             |
| <input checked="" type="checkbox"/> | Pm Top Level Hierarchy Demo |             |
| <input checked="" type="checkbox"/> | Risk User Group             |             |
| <input type="checkbox"/>            | User Group 1                |             |
| <input type="checkbox"/>            | User Group 2                |             |
| <input type="checkbox"/>            | User Group 3                | Gove users  |

## Risk User: Limited Asset Group

**pbac\_pm\_risk\_owner**  
Define the user account settings, including group and role assignments.

**User Information**

**First Name:** Risk  
**Last Name:** Owner  
**Job Title:** Risk  
**Phone Number:** 0629885547  
**Email:** ██████@informatica.com  
**Description:**

**Assigned User Groups and Roles**

| Enabled                             | Group Name                  | Description |
|-------------------------------------|-----------------------------|-------------|
| <input type="checkbox"/>            | Admin Group                 |             |
| <input type="checkbox"/>            | All User group              |             |
| <input type="checkbox"/>            | GrpFinanceFR                |             |
| <input type="checkbox"/>            | IT Department Group         |             |
| <input type="checkbox"/>            | Lending user group          |             |
| <input type="checkbox"/>            | Liquidity User Group        |             |
| <input type="checkbox"/>            | Pm Top Level Hierarchy Demo |             |
| <input checked="" type="checkbox"/> | Risk User Group             |             |
| <input type="checkbox"/>            | User Group 1                |             |
| <input type="checkbox"/>            | User Group 2                |             |
| <input type="checkbox"/>            | User Group 3                | Gove users  |

# MCC: Different Asset Group Structures Possible

Asset Groups can be organised hierarchically

- Permission required: **Manage Asset Groups**
- Governance Goal
  - Share as much as you can
  - Protect what you must
- In CDGC you only need to add an asset to the most restrictive group(s) required
  - Nest in Child Asset groups
  - 4 Levels max

**Possible Models**

|  |   |
|--|---|
| <input type="checkbox"/> <b>Global</b>   | <input type="checkbox"/> <b>Finance</b>     |
| <input type="checkbox"/> <b>Americas</b> | <input type="checkbox"/> Finance France     |
| <input type="checkbox"/> Brazil          | <input type="checkbox"/> Finance UK         |
| <input type="checkbox"/> Canada          | <input type="checkbox"/> Finance US         |
| <input type="checkbox"/> USA             |   |
| <input type="checkbox"/> <b>Asia</b>     | <input type="checkbox"/> <b>Infa Group</b>  |
| <input type="checkbox"/> India           | <input type="checkbox"/> <b>Infa France</b> |
| <input type="checkbox"/> Japan           | <input type="checkbox"/> Legal - FR         |
| <input type="checkbox"/> <b>Europe</b>   | <input type="checkbox"/> <b>Infa NA</b>     |
| <input type="checkbox"/> France          | <input type="checkbox"/> Legal - US         |
| <input type="checkbox"/> Germany         | <input type="checkbox"/> Sales - US         |
| <input type="checkbox"/> UK              | <input type="checkbox"/> <b>Infa UK</b>     |
|  | <input type="checkbox"/> Legal - UK         |

# MCC: Asset Group – Different Ways to Organise

Different customers will choose different structures

- How should asset groups be organised?
  - There's no right/wrong answer
  - BUT any hierarchy used can affect how policies impact viewer access
- We recommend
  - Get comfortable with MAC before introducing Asset Groups
- **Less is more**
  - Simpler to understand
  - Simpler to manage

|                          |          |
|--------------------------|----------|
| <input type="checkbox"/> | Global   |
| <input type="checkbox"/> | Americas |
| <input type="checkbox"/> | Brazil   |
| <input type="checkbox"/> | Canada   |
| <input type="checkbox"/> | USA      |
| <input type="checkbox"/> | Asia     |
| <input type="checkbox"/> | India    |
| <input type="checkbox"/> | Japan    |
| <input type="checkbox"/> | Europe   |
| <input type="checkbox"/> | France   |
| <input type="checkbox"/> | Germany  |
| <input type="checkbox"/> | UK       |

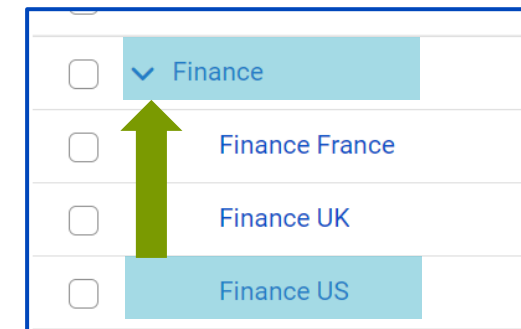
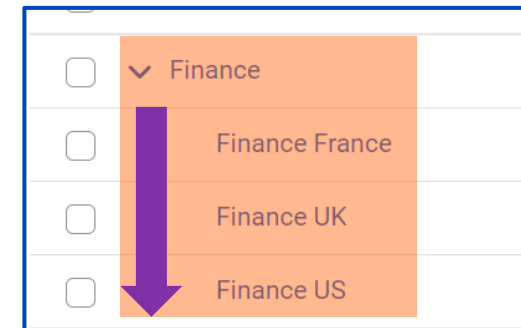
# MCC: Asset Group Structures: Most Likely

## Single Parent, Multiple Children

- A multinational company has organised its finance function across three territories – France, UK and USA
- Examples of how policy at different level of Asset Group will affect visibility

- Users granted access to **Finance** asset group will see
  - All assets marked with Finance asset group
  - All assets marked with any child asset group (France, UK and US)

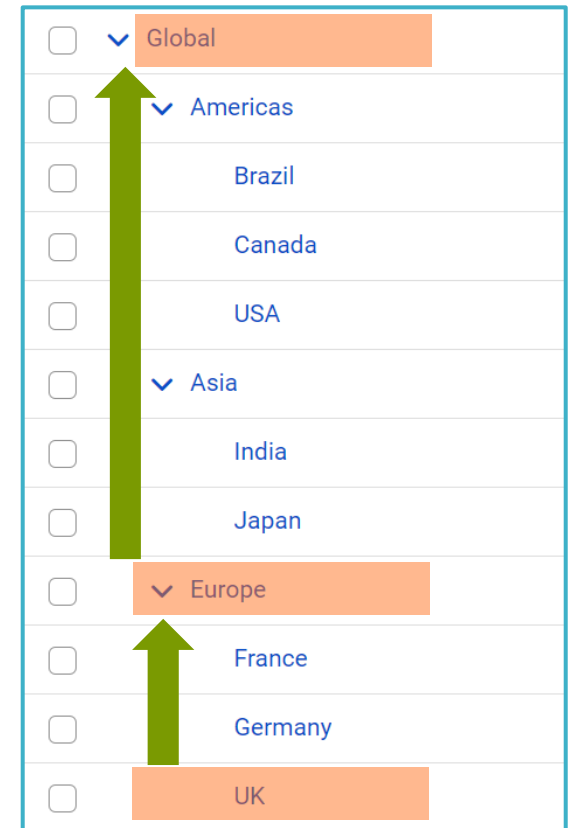
- Users granted access to **Finance US** asset group will see
  - All assets marked with Finance US asset group
  - All assets marked with Finance asset group
  - **No access to peers** (Finance France, Finance UK)



# MCC: Asset Group Structures

## Global / Region / Territory model - I

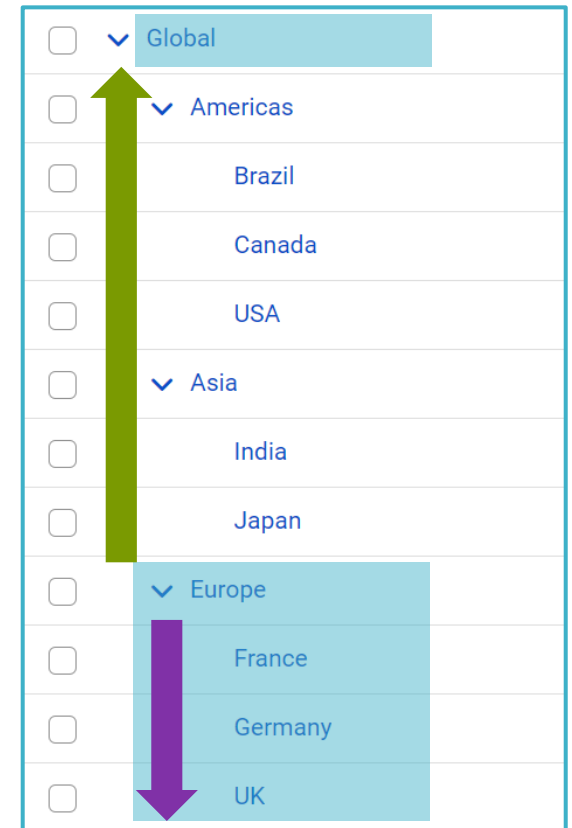
- Three levels of nested Asset Groups - same principles apply
- Users subject to a **UK** asset group policy will have access to:
  - Access to objects: **UK and Europe** and **Global** asset groups
  - No access to objects:
    - Peers in Europe Group (France, Germany)
    - Parents' peers (Asia and Americas)



# MCC: Asset Group Structures

## Global / Region / Territory model - II

- Compare with different policy at different level of asset group
- Users subject to a **Europe** asset group policy will have access to:
  - Any asset marked with **Europe**
  - All assets with child asset groups: **France, Germany, UK**
  - Parent: any asset marked with **Global**
- This policy does **not** grant any access to objects in asset groups:
  - Europe's peer asset groups: Americas, Asia



# 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 different asset counts affect the shared search and dashboards. The dashboard is titled "My Dashboard" and contains several sections:

- Help for Getting Started:** Links for Search & Browse for Assets, Create Assets, Workflows & Tickets, Understanding Business Assets, Understanding Technical Assets, Data Lineage, and Bulk Import Business Assets.
- Business Term by CDE:** A partial view of a chart.
- CLAIRE Activity:** Powered by CLAIRE, showing 1K ASSETS WITH RECOMMENDATIONS. It includes a bar chart for RECOMMENDATION TYPE and another for RECOMMENDATION STATUS.
- Business Assets:** A grid of asset counts:
  - 84 Policy (highlighted with an orange box)
  - 61 Process (highlighted with an orange box)
  - 58 Business Term
  - 14 Subdomain
  - 14 System (highlighted with an orange box)
  - 7 Data Set
  - 4 Domain
- Technical Assets:** 41 Catalog Source.
- Tickets Assigned to Me (Business Term):** A table with columns for Ticket title and Ticket status, showing "Nothing to" with an information icon.

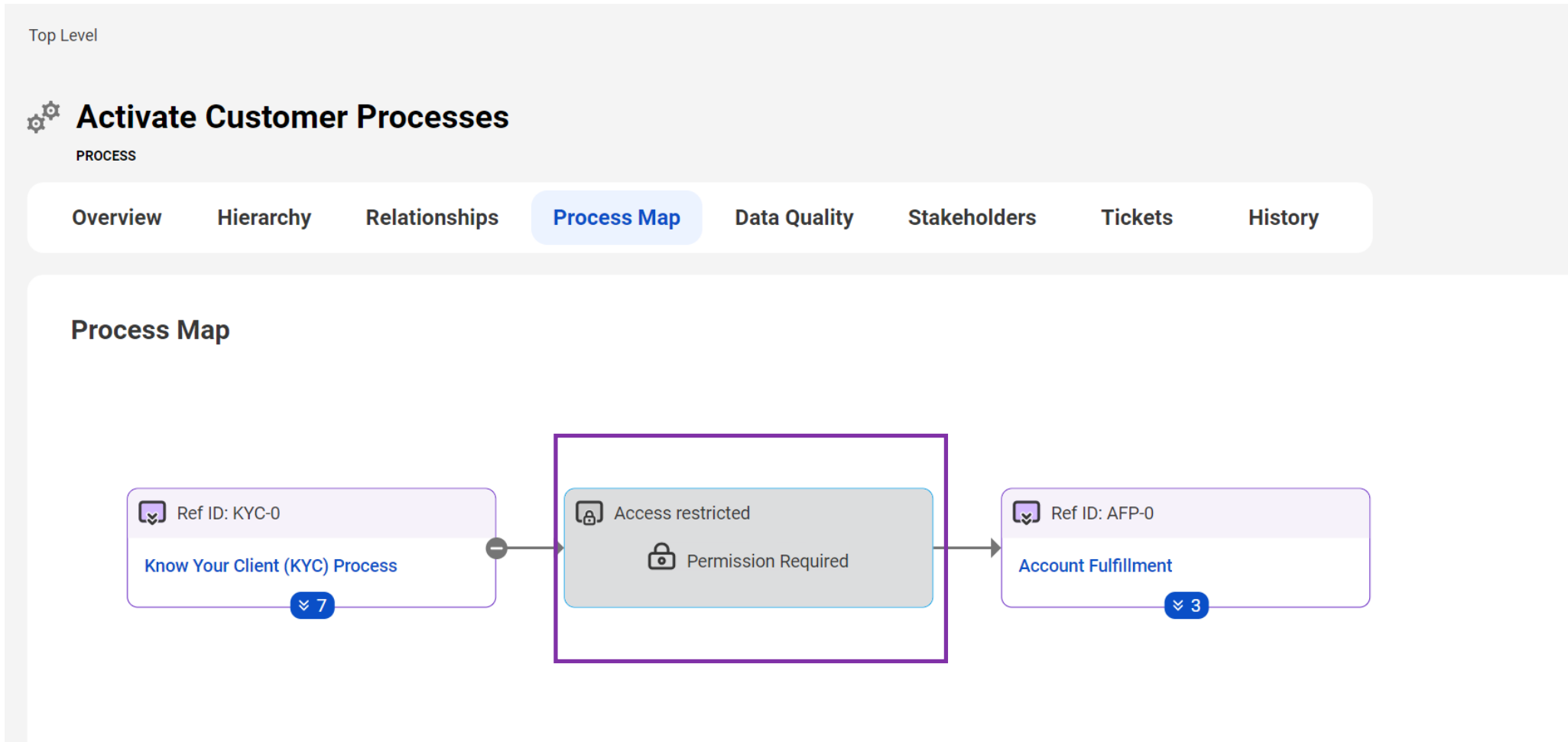
The bottom screenshot is identical to the top one, but with updated asset counts in the Business Assets section:

- 83 Policy (highlighted with an orange box)
- 59 Process (highlighted with an orange box)
- 58 Business Term
- 14 Subdomain
- 13 System (highlighted with an orange box)
- 7 Data Set
- 4 Domain



# 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 the 'Activate Customer Processes' interface, illustrating the 'New Panel on Asset Page' when asset groups are configured.

**Top Screenshot: Know Your Client (KYC) Process**

- Process:** Know Your Client (KYC) Process
- Overall Rating:** 4 stars (Add)
- Lifecycle:** PUBLISHED
- Last Updated:** Dec 2, 2024, 9:20 AM
- Navigation:** Overview, 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
  - Duration: -
  - Process Type: Process
- Asset Groups (3):** Risk, Liquidity, Lending
- Stakeholders:** There are no stakeholders assigned to this asset. Click here to add a stakeholder.

An arrow points from the 'Asset Groups (3)' list to a box containing the following items:

- Risk
- Liquidity
- Lending

**Bottom Screenshot: Anti Money Laundering**

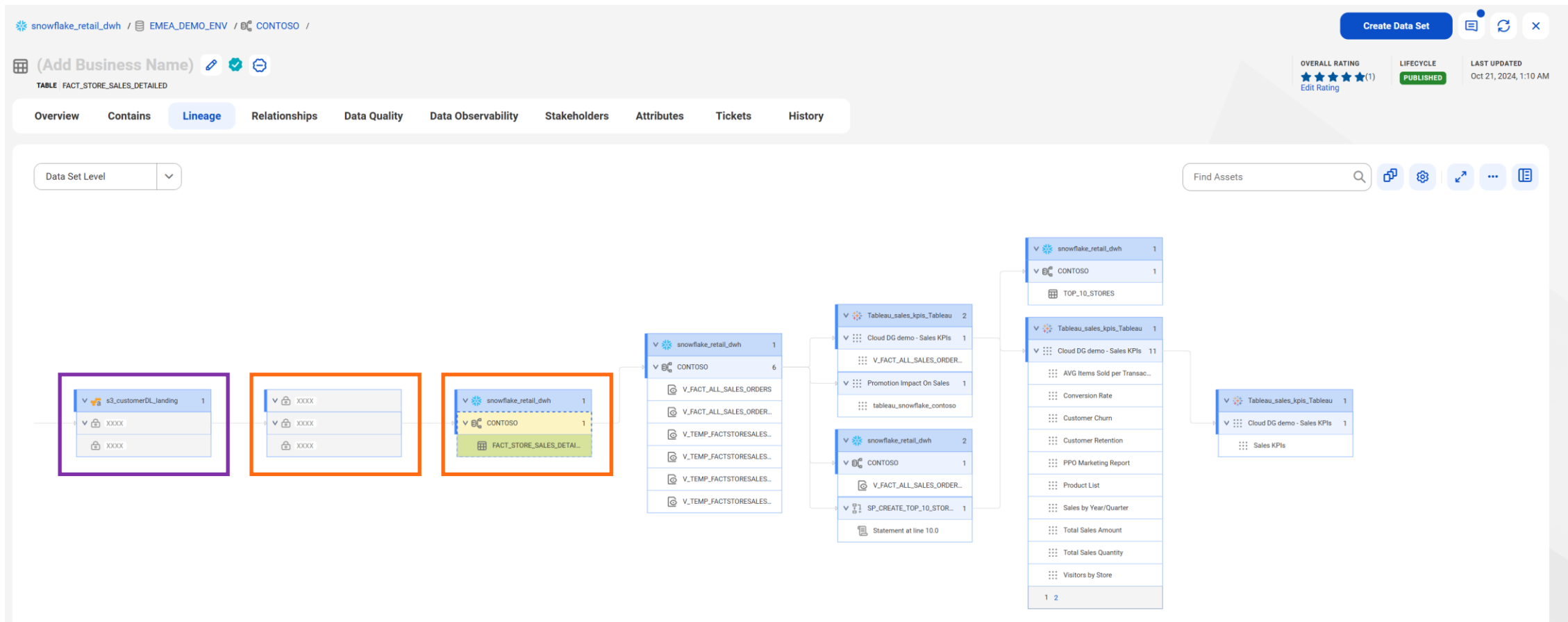
- Process:** Anti Money Laundering
- Overall Rating:** 4 stars (Add)
- Lifecycle:** PUBLISHED
- Last Updated:** Dec 2, 2024, 12:37 PM
- Navigation:** Overview, Hierarchy, Relationships, Process Map, Data Quality, Stakeholders, Tickets, History
- Description:** Confirm suitability of new customer
- Attributes:**
  - Parent: Activate Customer Processes
  - Reference ID: AML-0
  - Duration: -
  - Process Type: Process
- Asset Groups (1):** Lending
- Stakeholders:** There are no stakeholders assigned to this asset. Click here to add a stakeholder.

An arrow points from the 'Asset Groups (1)' list to a box containing the following item:

- Lending

# CDGC: What might you see?

## Technical data lineage example



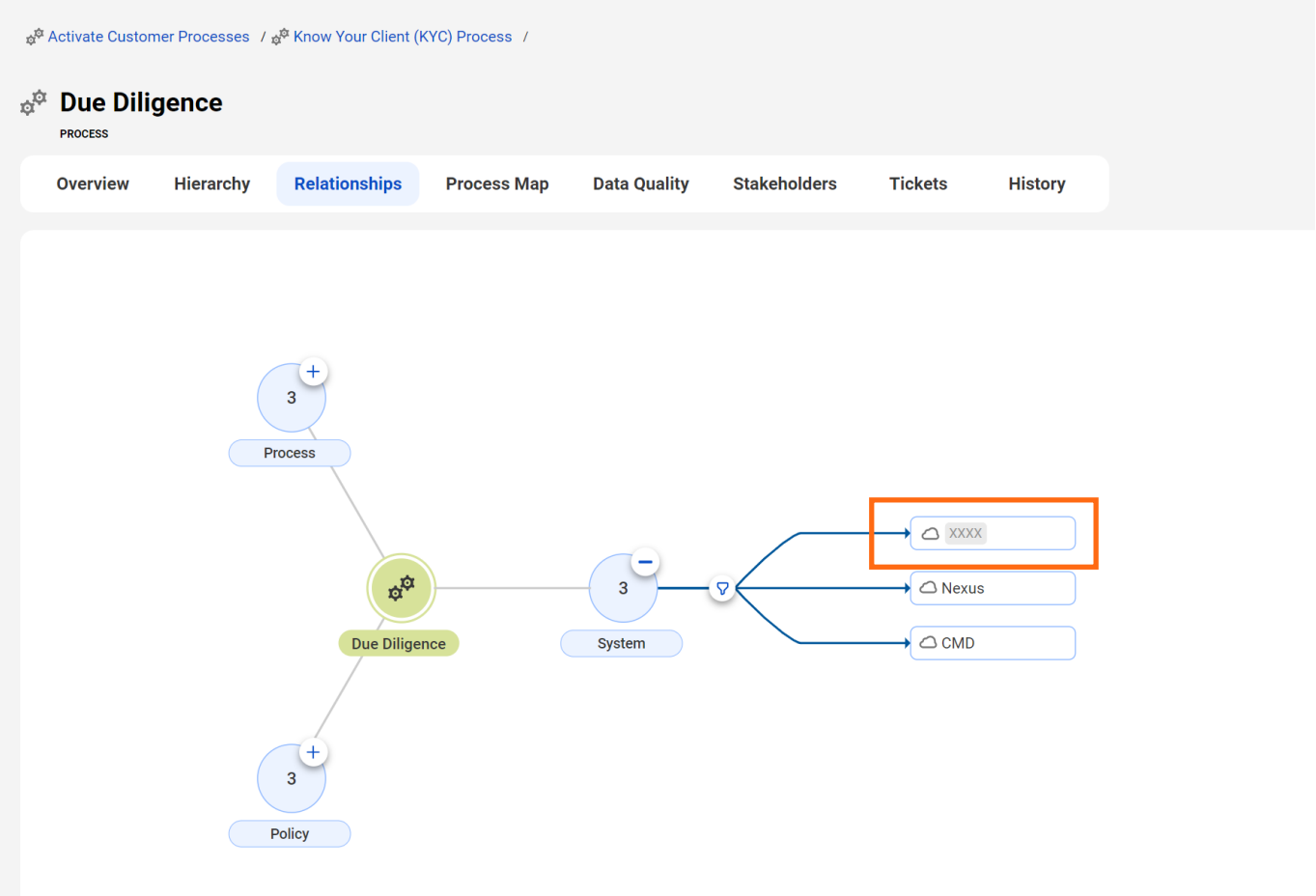
# CDGC: What might you see?

If you can't see the asset, you can't see the overlay

The screenshot displays the Informatica Data Catalog interface for a table named `FACT_STORE_SALES_DETAILED`. The breadcrumb trail shows the path: `snowflake_retail_dwh` / `EMEA_DEMO_ENV` / `CONTOSO`. The interface includes a search bar, a "Find Assets" button, and a "Data Set Level" dropdown. The main content area shows a lineage diagram with four "Glossary" nodes. The first node is `s3_customerDL_landing` (rating 1). The second and third nodes are highlighted with orange boxes and show `snowflake_retail_dwh` (rating 1) and `CONTOSO` (rating 1), with the `FACT_STORE_SALES_D...` asset (rating 1) having a checkmark and the attribute `Sales Amount`. The fourth node shows a list of views including `V_FACT_ALL_SALES_ORDERS` and `V_TEMP_FACTSTORESALES...`. The interface also includes a "Create Data Set" button, an "OVERALL RATING" of 4 stars (1 review), a "LIFECYCLE" of "PUBLISHED", and a "LAST UPDATED" date of Oct 21, 2024, 1:10.

# CDGC: What will you see?

## Relationships Maps



# New Search Patterns & Filters

Query

governance and Catalog

Adaptive

\*

\*

## Filters

[Clear All](#)

### Asset Type (7) [Clear](#)

Find

[Process \(15\)](#) [Manual Data Element \(4\)](#) [Data Set \(4\)](#) [System \(2\)](#)  
[Domain \(1\)](#) [Policy \(1\)](#) [Subdomain \(1\)](#)

- > Lifecycle (1)
- > Created By (5)
- > Created On
- > Updated By (4)
- > Updated On
- > Stakeholders (1)

### Asset Groups [Clear](#)

Select  No Asset Groups

[Liquidity x](#) [Risk x](#) [Lending x](#)

> Ratings

## Search Results (26)

[Asset Type: Process, Manual Data Element x](#) [Asset Groups: Lending, Liquidity, Risk x](#)

### Decision

[PROCESS](#) | [Activate Customer Processes](#) / [Know Your Client \(KYC\) Process](#)

Decide based on the outcome from the due diligence and the risk assessment to proceed in the appropriate way.

### Initiate KYC

[PROCESS](#) | [Activate Customer Processes](#) / [Know Your Client \(KYC\) Process](#)

Sourcing KYC required information according to the type of customer and the products requested.

### KYC Risk Classification

[PROCESS](#) | [Activate Customer Processes](#) / [Know Your Client \(KYC\) Process](#)

Using the due diligence output to complete a KYC assessment classification and assign party risk classification.

### Escalate

[PROCESS](#) | [Activate Customer Processes](#) / [Know Your Client \(KYC\) Process](#)

If customer is suspected of unauthorised behaviour or interactions matters are escalated.

# OOTB

- No asset groups configured / supplied
  - Too many different organisational models possible
  - Not everyone will use Asset Groups
- Policy allowing all users to see assets with no Asset Group

# CDGC: Asset Group Assignment

- User assigning Asset Group(s) requires the **Manage Access** permission (and Asset **Update**)
- Technical Assets: Can be assigned to new Catalog Source when registering (in Associations tab)
- Propagation
  - All Assets: Parent Asset Group(s) propagated down the hierarchy
  - **Overrides:**
    - Top Down: Change any branch after initial Asset Group propagation
    - Bottom Up: Stops propagation from a superior object



# Data Elements & MAC

- Even without Asset Groups...
- Any user with Read access to a Data Set will see all the Business Data Elements that the stakeholders see in that Data Set
  - Even if they have no access to Technical assets
  - Data Set editors need access to catalog to select Technical Data Elements for use as Business Data Elements

# Data Elements & Asset Groups

Easy: Inherit the parent Table/Data Set Asset Group(s)

- **TDE**: Scanned Data Element in the Technical Catalog
- **MDE**: Manual Data Element (single Business Data Set)

## New for November 24: “Business Data Elements (BDE)”

- BDEs have always been there, now they have a name
  - Every copy of a TDE used in a Business Data Set
  - Multiple copies of that TDE are possible in different Data Sets
- **November 2024**: Each **BDE** will inherit the asset group(s) of the **Technical Data Element**

# Intelligent Glossary Association & Asset Groups

- IGA itself is **not** Asset Group aware
  - Creates recommendations against all data elements...
  - ...Regardless of any asset's Asset Group(s), or the permissions of the user initiating the job
- These recommendations do not show in search / against the object if the accountable stakeholders do not have full access to determine suitability and accept/reject

# Metadata Access Control

## Summary

### More Control

- Greater control over different asset types
  - Who can access
  - Who can be a stakeholder
- Write your own rules
- In Metadata Commend Centre (MCC)

### Attribute Based

- Lifecycle
- Reference Technical Assets
- Asset Groups

### Attribute Group Based

- Profiling
- Data
- Code
- Unpublished Changes



Louis Noel Trapadoux, Colin Craig

# Thank You

Where data & AI come to **LIFE**

