



07 Jul 2026

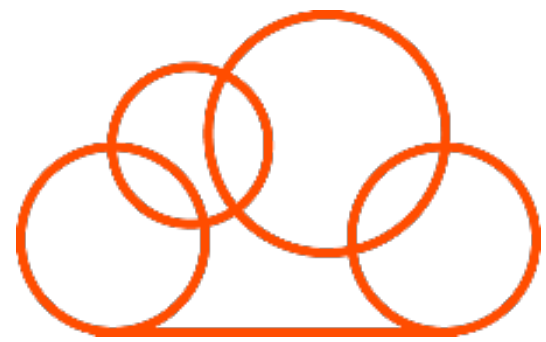
CDGC Dashboards: From Insights to Action

Megha Chauhan, Product Manager Senior Specialist, CDGC

Housekeeping Tips



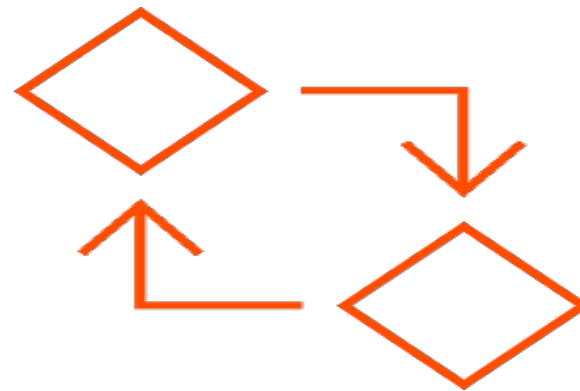
- Today's session is scheduled for **1 hour** and will feature a presentation followed by a Q&A session at the end.
- To ensure a smooth presentation without interruptions, all participants will be muted.
- Please submit your questions to "All Panelists" using the **Q&A panel**. We look forward to answering them during the live Q&A.
- This session is **being recorded**. The recording and slide deck will be available on our [Success Portal](#), and a recorded link will be emailed to you after the event.
- We value your input! Please take a moment to complete the **post-webinar survey** to share your feedback and suggest future topics.



Bootstrap trial and POC
Customers



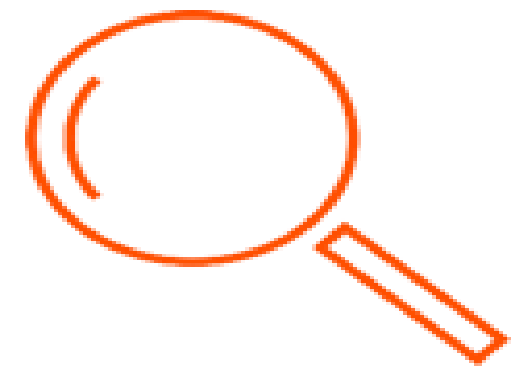
Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions

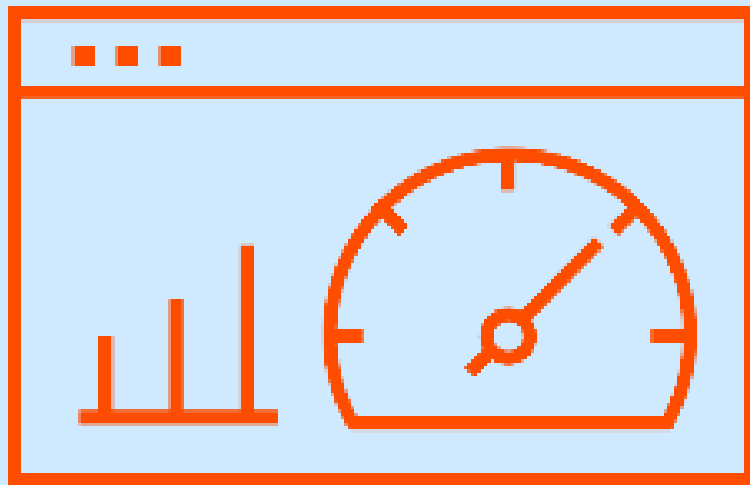


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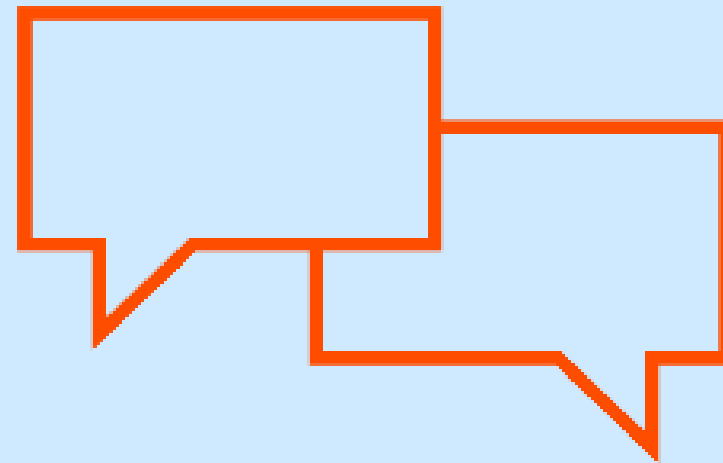
Tailored training and
content
recommendations

More Information



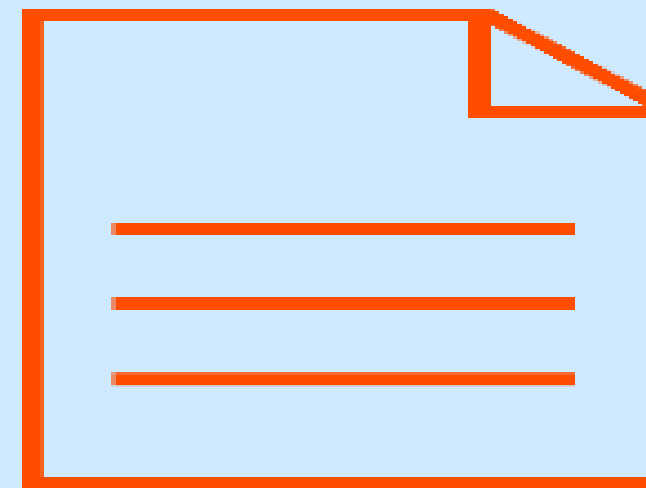
Success Portal

<https://success.informatica.com>



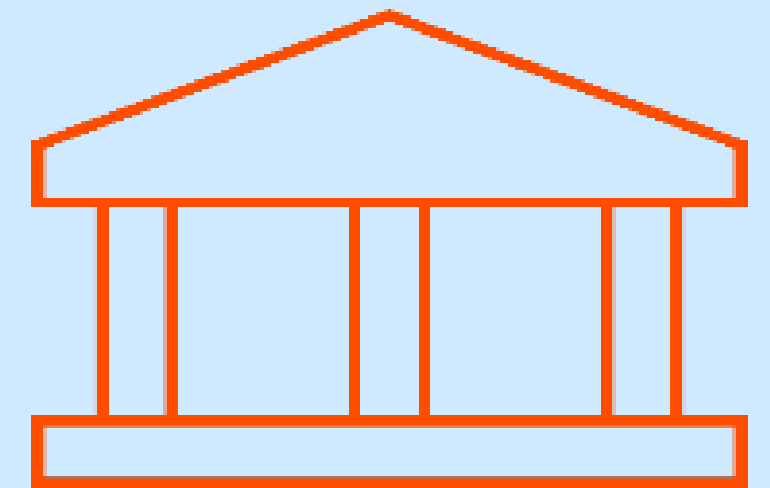
Communities & Support

<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

01 Dashboard Overview

02 Building Dashboards
Widgets using Saved
Searches

03 Role-Based Default
Dashboards & Sharing

04 Personalization of
Dashboards

05 Dedicated Dashboard
URLs

06 Turning Insights into
Action

Overview



Dashboards transform governance data into personalized, actionable experiences

- Centralized governance workspace that brings together key metrics, trends, tasks, and actionable insights in a single view.
- Purpose-built for every persona, enabling administrators, data stewards, owners, and business users to focus on what matters most.
- Flexible and configurable using a rich set of widgets, saved searches, and search-driven dashboards tailored to business needs.
- Role-aware and shareable, with administrator-defined default dashboards and dedicated URLs for seamless collaboration.
- Action-oriented experience that enables users to move from governance insights to operational tasks with just a few clicks.

Create Widgets using Saved Searches



Search-based widgets can be created using new search criteria and existing saved searches

- Leverage existing saved searches to quickly create dashboard widgets without redefining search criteria.
- Display dynamic results that automatically reflect the latest governance data as assets and metadata change.
- Reuse search logic across multiple dashboards for consistency and easier maintenance.
- Support a variety of visualizations, such as tables, charts, and KPI widgets, based on saved search results.

Role-Based Default Dashboards



Deliver the right dashboard to the right audience while enabling secure collaboration through role-based defaults, controlled sharing, and flexible access permissions.

- Assign default dashboards by role to deliver a personalized landing experience for every user.
- Ensure users see the most relevant insights based on their responsibilities from the moment they sign in.
- Share dashboards with specific users, user groups, roles and grant View or Edit permissions based on their level of involvement.
- Optionally share the underlying saved searches used by dashboard widgets, allowing recipients to access and reuse the search definitions.

Personalization of Dashboards



Empower users to tailor dashboards to their unique priorities while preserving shared governance insights.

- Customize dashboard layouts by rearranging and resizing widgets to match individual preferences.
- Create multiple personal dashboards for different projects, initiatives, or areas of responsibility.
- Clone existing dashboards to quickly create a personalized copy without modifying the original.
- Reuse shared dashboards as a starting point and personalize them independently while preserving the shared version.
- Quickly switch between dashboards to support different workflows and day-to-day activities.

Dedicated Dashboard URLs



Enable seamless access and collaboration by sharing dashboards through direct, reusable links.

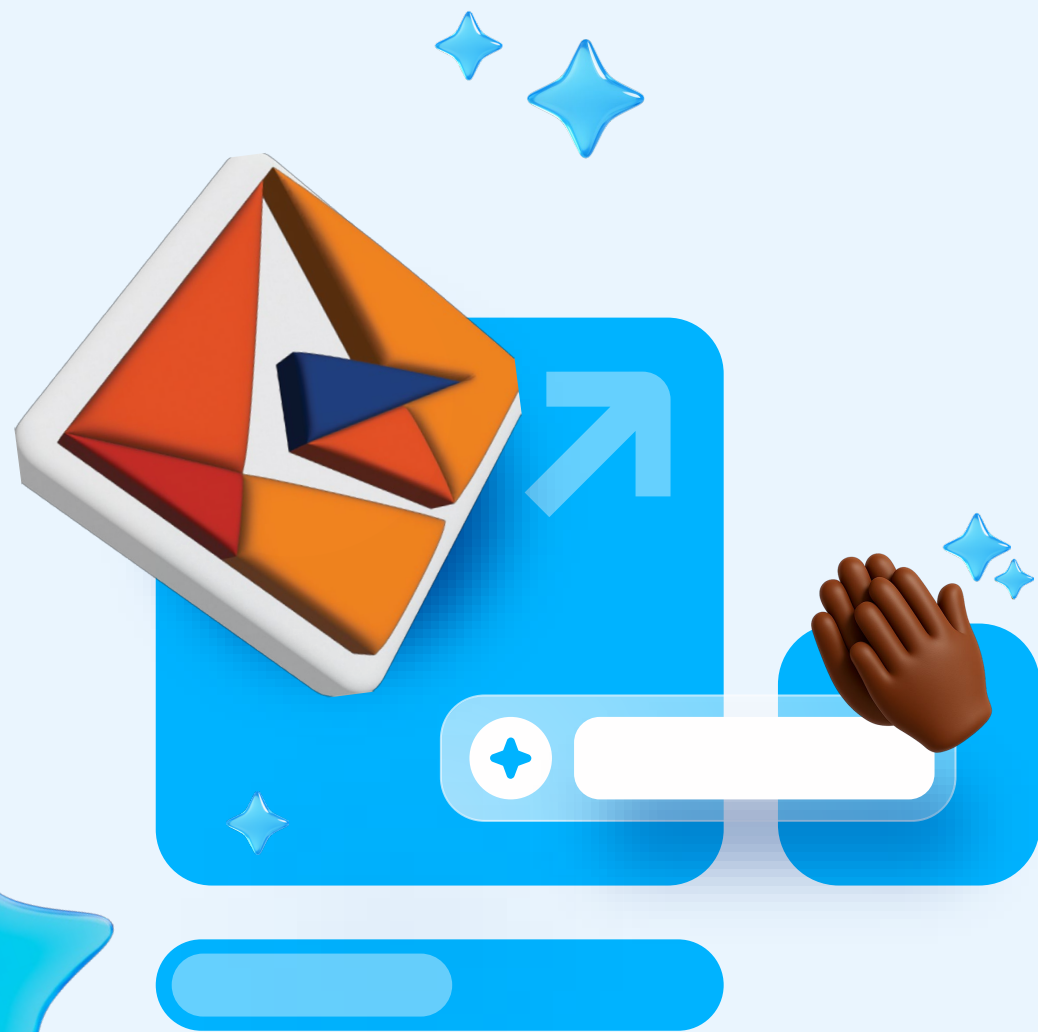
- Generate a unique URL for every dashboard for quick and direct access.
- Share dashboard links through email, documentation, or collaboration tools.
- Eliminate manual navigation by taking users directly to the intended dashboard.
- Respect dashboard permissions, ensuring users can only access dashboards they are authorized to view or edit.

From Insights to Action



Turn governance insights into meaningful outcomes by seamlessly moving from discovery to actions

- Drill down from widgets to explore the underlying assets or tasks behind every insight.
- Export widget results for offline review, bulk updates, or collaboration with stakeholders.
- Re-import updated data to efficiently apply bulk changes and accelerate curation activities.
- Reduce time to action by using dashboards as the starting point for day-to-day governance operations.



Demo



Thank
you