

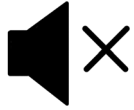
02 June, 2026

# Workflow Enhancements in CDGC

- Pradeep G N, Sr. Product Manager - CDGC

Where data & AI come to 

# Housekeeping Tips



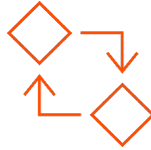
- Today's Webinar is scheduled for **1 hour**
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" 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.



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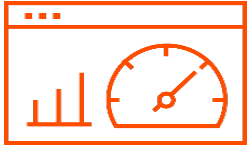


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## Success Portal

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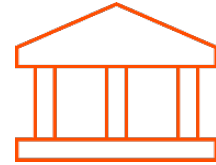
## Communities & Support

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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

1 Condition based Workflow event configuration

2 Tickets for asset creation and updates via bulk import

3 Bulk Actions from Task Inbox

4 Q&A

# Condition based Workflow event configuration

# Condition based Triggering of Tickets and Workflows

Workflow event configuration allows for the conditions to be defined for validation. Multiple conditions can be defined in a single Workflow event.

**Configure workflow event using following predicates:**

**Hierarchy**

**Attribute**

**Relationship**

**Stakeholder  
Role**

**Asset Groups**

## **Execution Order & Evaluation Logic**

Set the execution order for Workflow events. The system evaluates conditions in sequence, triggering the first matching workflow and ending further evaluation.

# Hierarchy

Configure workflow events for Assets based on the hierarchy to which it belongs.

Following options are available to configure the hierarchy conditions:

## Is Any Of

To add a condition that applies for immediate child assets of the selected asset

## Is Null

To add a condition that applies for all assets in the top level

## Is Any

To add a condition that applies for all child level assets with any parent

## Contains

To match the selected asset in any level of hierarchy. Applicable to immediate child or grandchild and so on

## Examples

- **Business Term and Metric** belonging to **Domain - Legal** to have different workflow than those belonging to **Domain - Sales or Finance**
- **Dataset** belonging to a **System - CRM** to have different workflow than those belonging to **System - Tableau**

The screenshot shows the configuration page for 'Glossaries in Finance Domain'. At the top, there are navigation buttons for 'Back', 'Next', and 'Save', along with a 'Status' indicator set to 'Disabled'. Below this, there are two tabs: 'Event Details' and 'Workflow', with 'Workflow' being the active tab. The main configuration area includes:

- Name:** A text input field containing 'Glossaries in Finance Domain'.
- Event Category:** A dropdown menu set to 'Asset Management'.
- Event Type:** A dropdown menu set to 'Approval Request for Create'.
- Description:** An empty text input field.

Below the main configuration is a section titled 'Add Asset Types and Conditions'. It features a horizontal bar with 'Asset Type' and three active filters: 'Is Any Of', 'Business Term', and 'Metric'. A '+ Add Asset Type' button is on the right. Below this bar, there is a visual logic tree. The root node is 'And', which branches into two conditions: 'Hierarchy' and 'Domain: Finance'. The 'Hierarchy' condition has a dropdown set to 'Is Any Of' and a '+ Add Asset' button. The 'Domain: Finance' condition has a '+ Add Asset' button. A '+ Add Predicate' button is located at the bottom of the logic tree.

# Attribute

Configure workflows based on asset attribute values. Supports **Boolean**, **Single**, or **Multi-select** dropdown data type attributes for both OOTB and Custom attributes.

## Is Any Of

Select multiple values for a single attribute to trigger the workflow.

## Is Null

Validates when fields are not set, are empty, or contain blank values.

## Is

Standard comparison for single select or boolean data types.

## Examples

- Differentiate workflows for Glossary terms based on **CDE (Critical Data Element)** vs. **Non-CDE** status.
- Assign workflows based on **Security Level** (e.g., Public, Internal, or Confidential).

The screenshot displays the 'Security Glossaries' configuration page. At the top, there are navigation buttons: '< Back', 'Next >', and a 'Save' button. A status indicator shows 'Status: Disabled'. Below this, there are two tabs: 'Event Details' and 'Workflow', with 'Workflow' being the active tab. The main form contains the following fields:

- Name:** A text input field containing 'Security Glossaries'.
- Event Category:** A dropdown menu with 'Asset Management' selected.
- Event Type:** A dropdown menu with 'Approval Request for Create' selected.
- Description:** A large text area for additional details.

Below the main form is a section titled 'Add Asset Types and Conditions'. It features a toolbar with buttons for 'Asset Type', 'Is Any Of', 'Business Term', 'Metric', and '+ Add Asset Type'. Below the toolbar, there is a visual logic builder with an 'And' connector. The first condition is 'Attribute Security Level' followed by a dropdown menu set to 'Is' and a dropdown menu set to 'Public'. There are also buttons for '+ Add Attribute' and '+ Add Attribute Value'.

# Asset Group

Configure to use workflows for assets based on the Asset Group it belongs to. Supports the following conditions for configuration:

## Is Any Of

Allows to choose multiple asset groups and evaluates to any one in the selection.

## Is Null

To validate if there is NO Asset group selected.

## Examples

Asset belonging to the Asset group of a region (**North America, Europe, APJ or Middle East**) or functional business unit (**Finance, HR, Legal, Sales**) would need a different workflows to be used based on the Asset Groups.

• Systems used in Sales

< Back Next > Save Status: Disabled X

Event Details Workflow

Name: Systems used in Sales

Event Category: Asset Management

Event Type: Approval Request for Create

Description:

Add Asset Types and Conditions

Asset Type Is Any Of Data Set System + Add Asset Type

And

Asset Group Is Any Of Sales + Add Asset Group

+ Add Predicate

# Relationship

Configures workflows based on an asset's outbound relationships. Existing relationships are evaluated during attribute changes in the Overview tab.

## Is Any Of

Validates against the specific Asset and relationship types defined for the asset under consideration.

## Examples

- Processes related to **"GDPR" Policy** require a special workflow than other processes.
- Assets linked to **Legal Entities** (e.g., Dept of Health, Tourism) trigger unique workflows based on relationship type.

## Key Points to note

- Updates to the relationship itself is **NOT** considered for review/approval.
- For new asset creation, use a conditionless event to hold publication until relationships are added.

The screenshot shows the 'Processes for GDPR' configuration page. At the top, there are navigation buttons: '< Back', 'Next >', and a 'Save' button. The status is 'Disabled'. Below the navigation, there are two tabs: 'Event Details' and 'Workflow', with 'Workflow' being the active tab. The main content area is titled 'Add Asset Types and Conditions'. It features a search bar with 'Asset Type', 'Is Any Of', and 'Process' filters, along with a '+ Add Asset Type' button. Below this, there is a tree view structure. The root node is 'And', which contains a 'Relationship' node. The 'Relationship' node contains an 'Is Any Of' node. The 'Is Any Of' node contains two 'Policy' nodes: 'Policy: GDPR Analytics Consent C...' and 'Policy: Right to be Forgotten'. Each 'Policy' node has '+ Add Asset', 'Is Related to', and '+ Add Relationship' buttons. There is also a '+ Add Relationship' button at the bottom of the 'Is Any Of' node and a '+ Add Predicate' button at the bottom of the 'And' node.

# Stakeholder

Configure workflows based on the stakeholder role of user who created or edited asset. Evaluation is based on the role of the user who has created or last edited the asset. Define specific workflows based on roles. This allows for bypass of multi step approvals for trusted or specialized roles.

## Is Any Of

Select one or more Asset Stakeholder Roles. Evaluation occurs against the stakeholder role of the user who created or edited the asset.

## Examples

- Assets created from **Data Stewards** require only a 1-step approval from **Data Owners**.
- Changes submitted by **SME / Gov User** roles default to a more rigorous 2-step approval process.

The screenshot shows a configuration page for a workflow titled "Stakeholder Role based". At the top right, there are navigation buttons: "< Back", "Next >", "Save", and a "Status" toggle set to "Disabled". Below the title, there are two tabs: "Event Details" (selected) and "Workflow".

The "Event Details" section contains the following fields:

- Name:** Stakeholder Role based
- Event Category:** Asset Management
- Event Type:** Approval Request for Change
- Description:** (empty text area)

Below this is a section titled "Add Asset Types and Conditions". It features a toolbar with "Asset Type", "Is Any Of", "Policy X", "Process X", and "+ Add Asset Type". The main area shows a logical flow starting with an "And" connector, followed by a box containing "Stakeholder Role", "Is Any Of", "Custom Role - Data Steward X", and "+ Add Stakeholder Role". Below this box is a "+ Add Predicate" button.

# Changes to Workflow event

- **One Event Type per Workflow Event:** Each workflow event can only be associated with a single event type.
- **Legacy Workflow Events:** Existing workflow events from before the upgrade will continue to function without requiring conditions. If you intend to use conditions, you must select only one event type for the workflow event.

The screenshot displays two workflow event configuration panels. The top panel, titled 'Secret Datasets', shows the 'Event Details' tab selected. The 'Event Type' dropdown is set to 'Approval Request for Create', and the 'Description' field contains 'Approval Request for Create' and 'Approval Request for Change'. An orange arrow points to the 'Event Type' dropdown. The bottom panel, titled 'Comments check', shows the 'Event Details' tab selected. The 'Event Type' field contains two selected items: 'Approval Request for Create' and 'Approval Request for Change'. A warning message below the field reads 'Multiple event types are selected.' An orange arrow points to this field. Below the 'Comments check' panel, there is a section titled 'Add Asset Types and Conditions' with a warning message: 'You can't add new conditions or edit existing conditions because you've selected multiple event types.' An orange arrow points to this warning message.

# Changes to Workflow events

- **Multiple Enabled Events:** You can have multiple enabled workflow events for the same Asset Type and Event type.
  - Multiple conditions within a workflow event are evaluated using the **OR** logic.
  - Within a single condition, multiple predicates are evaluated using the **AND** logic.

The screenshot displays the Informatica Metadata Command Center interface. The top navigation bar includes the Informatica logo, 'Metadata Command Center', and 'Inboarding Assistant'. The main content area is titled 'Configure' and shows a table of 'Workflow Events (21)'. The table has columns for Name, Type, Asset Type, Created By, Workflows, and Status. Several events are marked as 'ENABLED'. Below the table, the 'Secret Datasets' configuration is shown, with the 'Event Details' tab selected. The logic is defined as 'Is Any Of' with the following conditions:

- Asset Type: Data Set
- And:
  - Hierarchy: System: Cust Date Lake (S3)
  - Relationship:
    - Is Any Of:
      - Legal Entity: Legal & Compliance ... is Related to ...
      - Geography: Germany is Related to ...
- Attribute: pii data is True

# Changes to Workflow events

- Evaluation Sequence and Reordering:
  - Workflow events can be reordered to control the sequence of evaluation.
  - The workflow configuration used in the Ticket will be based on this evaluation sequence.

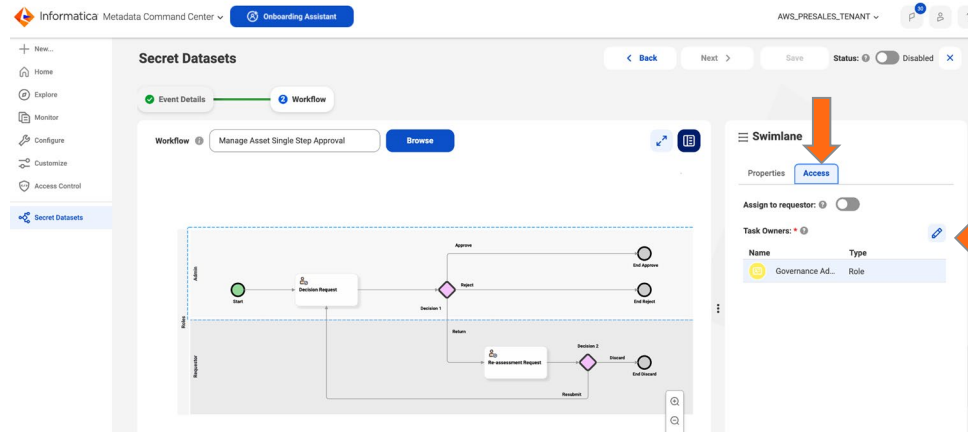
**Best Practice:** Place workflow events with specific condition evaluations at the top, and those with generic conditions at the bottom.

The screenshot shows the Informatica Metadata Command Center interface. A modal dialog titled "Reorder Workflow Events (21)" is open, displaying a table of workflow events. The table has three columns: Name, Type, and Asset Type. The "Demo" event is selected, and a context menu is open over it, showing "Move to Top" and "Move to Bottom" options. An orange arrow points to the "Reorder" button in the background interface.

Name	Type	Asset Type
Secret Datasets	Approval Request for Create	Data Set
GNP_Glossary_Create_Domain	Approval Request for Create	Business Term, Metric
Demo	Approval Request for Create	Business Term, Metric
GNP_Glossary_Create_Domain	Approval Request for Create	Business Term, Metric
GNP_Dataset_Hierarchy_Create	Approval Request for Create	Data Set
GNP_System_Stakeholder_Create	Approval Request for Create	System
GNP_Process_StakeholderRole_Owner	Approval Request for Change	Process
GNP_Process_StakeholderRole	Approval Request for Change	Process
GNP_Glossary_Create_Attribute	Approval Request for Create	Business Term, Metric
fb - bi - internal - Assign to requestor	Approval Request for Change	Business Term

# Changes to Workflow configuration

- Role assignment to swimlane is changed:
  - Stakeholder Role assignment is in Access Tab
  - Name of the swimlane needs to be provided in Properties tab and can be independent of the Stakeholder Role selection
  - Requestor selection is through the toggle switch



# Tickets for asset creation and updates via bulk import

# Bulk Import with Automated Ticket Creation

- Bulk import of business assets (creation/updates) can trigger approval tickets if workflow events are configured.
- The Bulk Import template includes a column to specify ticket creation during asset creation or update.
- By default, this is considered as 'Yes' if left blank or using older template without the column, but users can opt out by setting it to 'No' explicitly at the row level in the import template.
- When a ticket is created, the asset's lifecycle is driven by the Workflow and will override any lifecycle provided in the Bulk Import template.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Reference ID	Name	Description	Alias Names	Area	Business Logic	Critical Data Element	Examples	Format Type	Format Description	Lifecycle	Office Email	pii data	region	Security Level	Test_demo	Submit Ticket			
2																				
3																				
4																				
5																				
6																				
7																				
8																				
9																				
10																				

YES  
NO

12:18 PM Today

Specify whether you want your action to go through a workflow approval.

[Show more](#)

From imported document

# Bulk Import job

- Tickets are only created if all required stakeholders are assigned; missing stakeholders can cause asset creation or update and ticket creation to fail.
- If a ticket for the asset is already open and in Draft lifecycle, the asset update will proceed, and ticket creation will be skipped.
- Bulk Import job status will now include both asset and ticket information.
- Email notifications to stakeholders for tickets created and tasks assigned will be collated at the job level or every 1 hour, and a single email will be sent.

The screenshot displays the Informatica Data Governance and Catalog interface for a Bulk Import job. The job is titled "BT\_Metric\_Demo.xlsx\_import" and is 100% completed. The Job Summary section shows 32 Created assets, 0 Updated assets, 0 Deleted assets, 0 Failed assets, 20 Tickets Created, and 4 Tickets Skipped. A table below provides a breakdown of assets and tickets by sheet and asset type.

File Name	Sheet	Asset Type	Total Assets	Imported Assets
BT_Metric_Demo.xlsx	2 Sheets	Business Term, Metric	32	32
	Business Term	Business Term	16	16
	Metric	Metric	16	16

The Job Details section provides the following information:

- Job ID: 69c770b3-e54f-422c-92a7-21b8... Import
- Job Type: Import
- Trace ID: 83b61aa8-2f60-4f37-b168-6642... Apr 21, 2026, 5:35:48 AM
- Start Time: Apr 21, 2026, 5:49:39 AM
- End Time: Apr 21, 2026, 5:49:39 AM
- Stop Running Job: Stop On Warning
- Execution Duration: 00:13:51

The Imported Assets section shows 16 Business Term assets and 16 Metric assets.

# Bulk Actions from Task Inbox

# Bulk Actions from Task Inbox

- Switch to the grouped view in Task Inbox.
- The grouped view enables:
  - Bulk actions (accept/reject)
  - Commenting
  - Claiming/Unclaiming
  - Assignment
- Tasks are grouped by the Workflow event used during Ticket creation to consolidate tasks with common actions.
- Users can bulk select up to 50 tasks per page to perform bulk actions.

The screenshot displays the Informatica Data Governance and Catalog interface. At the top, there is a search bar and navigation options. The main content area is titled 'Tasks Inbox' and features several summary cards: 'Priority' showing 22 tasks with a gauge chart, 'Event Type' with a donut chart, and 'Due Date' showing 21 tasks with a progress bar. Below these, there are two main sections: 'Tasks by Workflows' and 'First Decision Request'. The 'Tasks by Workflows' section shows a list of tasks grouped by workflow, with 8 tasks selected. The 'First Decision Request' section provides detailed information about a specific task, including instructions for evaluation and asset details.

Asset Name	Event Type	Asset Type	Due Date	Task Ow
GNP_BT_BLO...	Approval R...	Business T...	26/04/2026	
GNP_Metric...	Approval R...	Metric	26/04/2026	
GNP_BT_BLO...	Approval R...	Business T...	26/04/2026	
GNP_Metric...	Approval R...	Metric	26/04/2026	
GNP_BT_BLO...	Approval R...	Business T...	26/04/2026	
GNP_BT_BLO...	Approval R...	Business T...	26/04/2026	
GNP_Metric...	Approval R...	Metric	26/04/2026	
GNP_BT_BLO...	Approval R...	Business T...	26/04/2026	

# Email Notifications for Bulk

Workflow Tasks Created | CDGC External | Inbox x

admin@informaticacloud.com to me

12:48 AM (12 hours ago)

Organisation: AWS\_PRESALES\_TENANT

Hi Pradeep SF,

**Tasks for workflow tickets are assigned to you**

Task Name	Ticket Name	Task Due Date
First Decision Request	<a href="#">Manage asset Business Term_GNP_BT_BI_016</a>	2026-04-26
Decision Request	<a href="#">Manage asset Business Term_GNP_BT_BI_012</a>	2026-04-26
Decision Request	<a href="#">Manage asset Metric_GNP_Metric_BI_012</a>	2026-04-26
First Decision Request	<a href="#">Manage asset Business Term_GNP_BT_BI_015</a>	2026-04-26
Decision Request	<a href="#">Manage asset Metric_GNP_Metric_BI_013</a>	2026-04-26
First Decision Request	<a href="#">Manage asset Business Term_GNP_BT_BI_014</a>	2026-04-26
First Decision Request	<a href="#">Manage asset Metric_GNP_Metric_BI_003</a>	2026-04-26
Decision Request	<a href="#">Manage asset Business Term_GNP_BT_BI_011</a>	2026-04-26
Decision Request	<a href="#">Manage asset Business Term_GNP_BT_BI_013</a>	2026-04-26
First Decision Request	<a href="#">Manage asset Metric_GNP_Metric_BI_014</a>	2026-04-26

10 out of 20 items. [View All](#)

**Next Step:** You can view all the tasks in the tasks inbox.

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Workflow Tickets Created External | Inbox x

admin@informaticacloud.com to me

12:47 AM (12 hours ago)

Organisation: AWS\_PRESALES\_TENANT

Hi Pradeep SF,

**Workflow tickets are created where you are the stakeholder**

Ticket Name	Asset	Ticket Type
<a href="#">Manage asset Business Term_GNP_BT_BI_015</a>	<a href="#">GNP_BT_BI_015</a>	Approval Request for Create
<a href="#">Manage asset Business Term_GNP_BT_BI_003</a>	<a href="#">GNP_BT_BI_003</a>	Approval Request for Create
<a href="#">Manage asset Metric_GNP_Metric_BI_001</a>	<a href="#">GNP_Metric_BI_001</a>	Approval Request for Create
<a href="#">Manage asset Business Term_GNP_BT_BI_002</a>	<a href="#">GNP_BT_BI_002</a>	Approval Request for Create
<a href="#">Manage asset Metric_GNP_Metric_BI_002</a>	<a href="#">GNP_Metric_BI_002</a>	Approval Request for Create
<a href="#">Manage asset Business Term_GNP_BT_BI_007</a>	<a href="#">GNP_BT_BI_007</a>	Approval Request for Create
<a href="#">Manage asset Business Term_GNP_BT_BI_008</a>	<a href="#">GNP_BT_BI_008</a>	Approval Request for Create
<a href="#">Manage asset Business Term_GNP_BT_BI_015</a>	<a href="#">GNP_BT_BI_016</a>	Approval Request for Create
<a href="#">Manage asset Metric_GNP_Metric_BI_016</a>	<a href="#">GNP_Metric_BI_016</a>	Approval Request for Create
<a href="#">Manage asset Metric_GNP_Metric_BI_013</a>	<a href="#">GNP_Metric_BI_013</a>	Approval Request for Create







10 out of 20 items. [View All](#)

**Next Step:** You can view all the tickets on the tickets manager page.

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# App Notifications for Bulk

AWS\_PRESALES\_TENANT ▾

## Notifications ⋮ ✕

All Services ▾

**i Multiple Workflow Tasks are Created** Unread

Multiple workflow tasks have been created where you are the stakeholder

... / Tasks • 2 days ago

[Open Tasks Inbox](#)

---

**i Workflow Tickets are Created** Unread

The workflow tickets are created where you are the stakeholder.

... / Tickets • 2 days ago

[Open Ticket Manager](#)

**+ Show 1 More Tickets Update**

# Q & A

# Thank You