

Informatica® Getting Started with MDM SaaS

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Informatica® Getting Started with MDM
SaaS
January 2023

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Preface

Use the *Informatica® Getting Started with MDM SaaS* to understand the design of the MDM SaaS architecture. Learn about the Secure Agent and the steps to onboard your organization. Use the prerequisite questionnaires and checklists to enter information about your existing environment.

Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

Informatica Network

The Informatica Network is the gateway to many resources, including the Informatica Knowledge Base and Informatica Global Customer Support. To enter the Informatica Network, visit <https://network.informatica.com>.

As an Informatica Network member, you have the following options:

- Search the Knowledge Base for product resources.
- View product availability information.
- Create and review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions. To search the Knowledge Base, visit <https://search.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit <https://docs.informatica.com>. If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at infa_documentation@informatica.com.

Informatica Product Availability Matrices

Product Availability Matrices (PAMs) indicate the versions of the operating systems, databases, and types of data sources and targets that a product release supports. You can browse the Informatica PAMs at <https://network.informatica.com/community/informatica-network/product-availability-matrices>.

Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services and based on real-world experiences from hundreds of data management projects. Informatica Velocity represents the collective knowledge of Informatica consultants who work with organizations around the world to plan, develop, deploy, and maintain successful data management solutions.

You can find Informatica Velocity resources at <http://velocity.informatica.com>. If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com

Informatica Marketplace

The Informatica Marketplace is a forum where you can find solutions that extend and enhance your Informatica implementations. Leverage any of the hundreds of solutions from Informatica developers and partners on the Marketplace to improve your productivity and speed up time to implementation on your projects. You can find the Informatica Marketplace at <https://marketplace.informatica.com>.

Informatica Global Customer Support

You can contact a Global Support Center by telephone or through the Informatica Network. To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link: <https://www.informatica.com/services-and-training/customer-success-services/contact-us.html>.

To find online support resources on the Informatica Network, visit <https://network.informatica.com> and select the support option.

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Overview of MDM SaaS

MDM SaaS is a cloud-based master data management solution. Business 360 Console provides a platform to create and manage data management applications, such as MDM - Customer 360 SaaS, MDM - Supplier 360 SaaS, and MDM - Product 360 SaaS Multidomain MDM - Product 360 SaaS. You can use these applications to onboard, consolidate, govern, enrich, and distribute data.

This guide provides a high-level overview of the architecture, questionnaires, and checklists that your IT administrator requires.

Prerequisites

Your IT administrator must complete the mandatory prerequisite questionnaires and checklist before the Informatica team can provision the MDM SaaS environments.

Key Terminologies

The following table lists the terms that Informatica Intelligent Data Management Cloud uses:

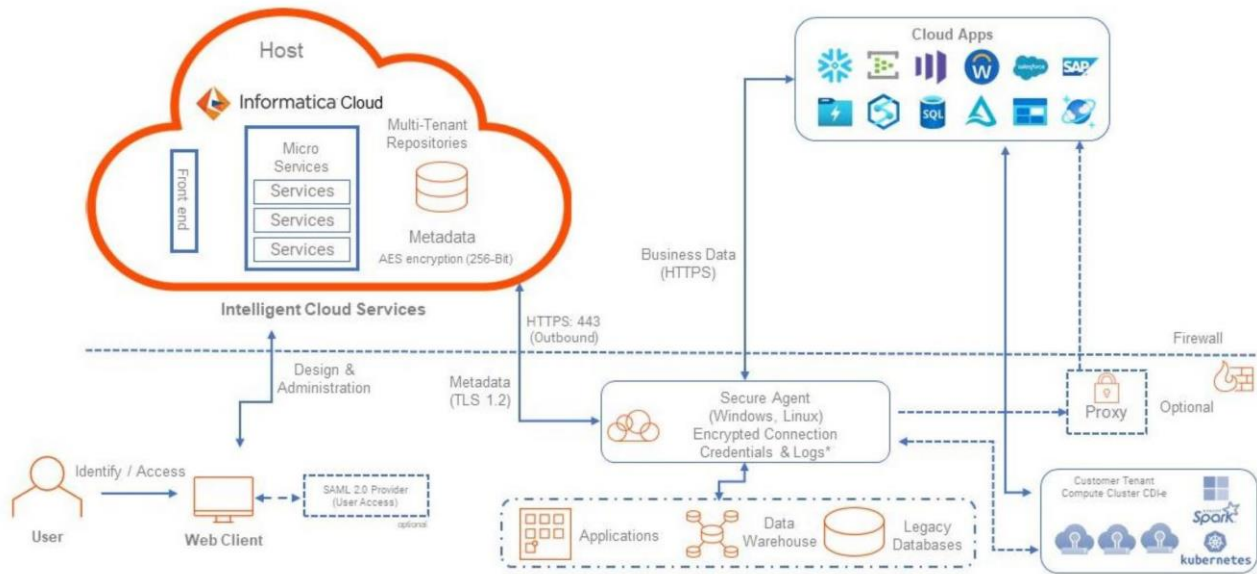
Term	Description
Source	Location from where you retrieve data.
Target	Location to which you move the data
Connection	Provides access to data in cloud and on-premise applications, platforms, databases, and flat files.
Organization	A secure area within the Informatica Intelligent Data Management Cloud repository that stores your licenses, user accounts, assets, such as business entities and reference data. You might have access to one or more organizations.
Secure Agent	A lightweight program that runs all tasks and enables secure communication across the firewall between your organization and Informatica Intelligent Data Management Cloud.
Asset	An object that can be created, read, updated, and deleted in Informatica Intelligent Data Management Cloud.

Secure Agent

A Secure Agent is a lightweight program that runs all tasks and enables secure communication across the firewall between your organization and Informatica Intelligent Data Management Cloud.

Secure Agent Architecture

The following image shows how a Secure Agent works with Informatica Intelligent Data Management Cloud:



For more information about Secure Agents, refer to the following Informatica Knowledge Base articles:

- [Minimum requirements and best practices to install a Secure Agent.](#)
- [FAQ: Is there a Secure Agent architecture guide for IICS?](#)
- [FAQ: Questions on Secure Agent Group in Informatica Cloud \(IICS\)](#)
- [HOW TO: Archive Informatica Cloud Data Integration Session/Tomcat/Agentcore Logs](#)
- [PAM for Informatica Intelligent Cloud Services \(IICS\)](#)
- [HOW TO: Fetch the public-IP of a Secure Agent by using a Java-Utility](#)

You can also refer to the following links that provide additional information about Secure Agent:

- [Downloading and installing a Secure Agent on Windows](#)
- [Learn about Cloud Data Integration](#)
- [Video to install Secure Agent SA on Linux](#)
- [Video to install Secure Agent on Windows](#)

Frequently Asked Questions about Secure Agent

Review the following frequently asked questions to understand more about Secure Agent:

- **How can I achieve high availability and failover?**
To achieve high availability and failover, add additional Secure Agents and then add them to a Secure Agent group. For more information about the Secure Agent group, see the [FAQ: Questions on Secure Agent Group in Informatica Cloud \(IICS\)](#) Knowledge article.

- **Confirm whether Secure Agent pushes data to Informatica cloud.**
Data stays in Secure Agent, and data never goes to Informatica cloud. For more information about the security architecture, see the [FAQ: Is there a Secure Agent architecture guide for IICS?](#) Knowledge article.

In MDM SaaS, during ingress, the data gets loaded into MongoDB.

- **What are the operating systems that the Secure Agents support?**
You own and manage a Secure Agent, so you can use any supported operating systems. To find the supported operating systems, see [PAM for Informatica Intelligent Cloud Services \(IICS\)](#).
- **Can I use the Hosted Agent in all three environments?**
No, you must use separate Secure Agents for each environment. You can use the serverless capabilities

for certain services, but not all.

- **Do I need a Secure Agent if I connect to a cloud application, such as Snowflake and Workday?**
Yes, you need a Secure Agent.
- **What are the requirements for a Secure Agent?**
See the [Minimum requirements and best practices to install a Secure Agent](#) Knowledge article.
- **What are the ports that a Secure Agent requires?**
A Secure Agent doesn't require any inbound port but requires the outbound port, 443. For more information about the required ports, see the [FAQ: Is there a Secure Agent architecture guide for IICS?](#) Knowledge article.

Environments or Organizations

Informatica by default provides the following environments or organizations as part of a contract:

- Development (Dev)
- Quality Assurance (QA)
- Production (Prod)

After an environment is provisioned, you can't change it to another environment. For example, after a development environment is provisioned, you can't change it to a production environment. If you need additional environments or organizations, contact your account manager for details.

Adding IP Addresses to Approved List

If you use protective firewall, then add the IP addresses that are specific to your POD to the firewall allow list.

For information about the IP addresses that are specific to your POD, see [POD Availability and Networking](#). For information about the IP addresses that are specific to MDM SaaS, see the [IP addresses for MDM SaaS](#) knowledge article.

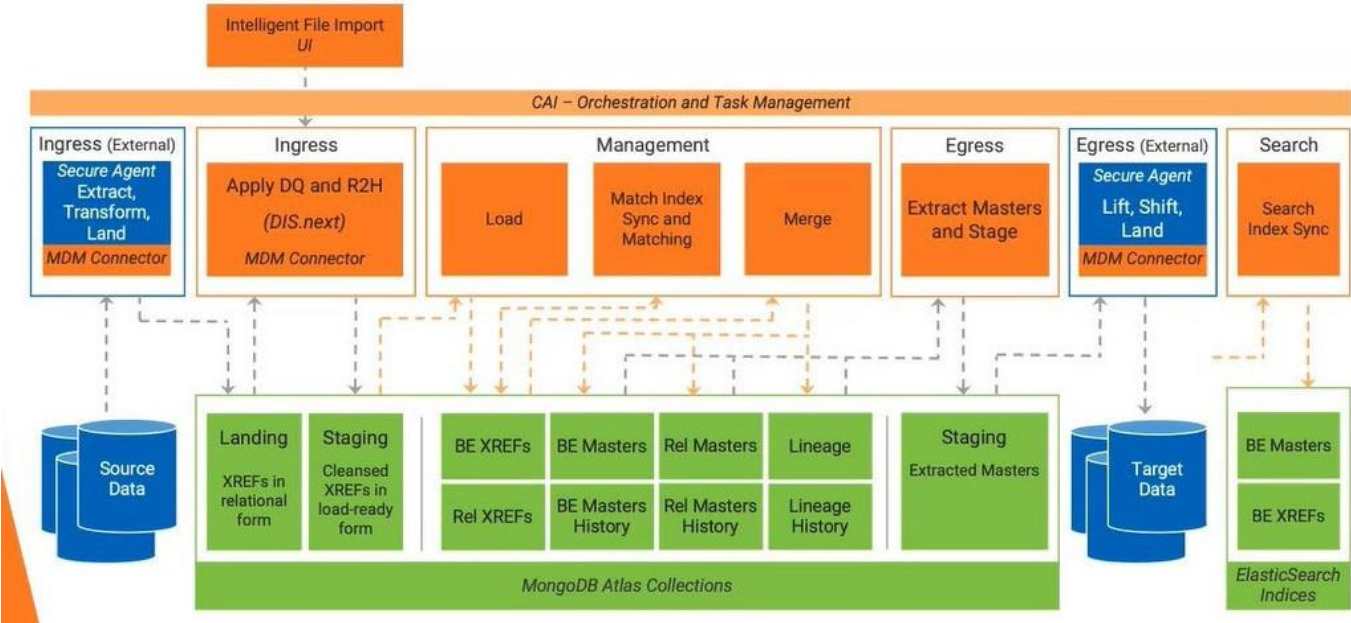
After you add the IP addresses to the firewall allow list, you can validate whether you have successfully added them. For more information about validating the IP addresses that you added to the firewall allow list, see the [Validate IP addresses for MDM SaaS](#) knowledge article.

Note: Informatica doesn't add any source specific IP addresses to allow list. After the July 2023 release, any firewall rules that open a MongoDB connection for the Secure Agent become obsolete.

When you use a proxy configuration, a Business 360 FEP connection fails. To fix this issue, see the [Business 360 FEP Test Connection Failure](#) knowledge article.

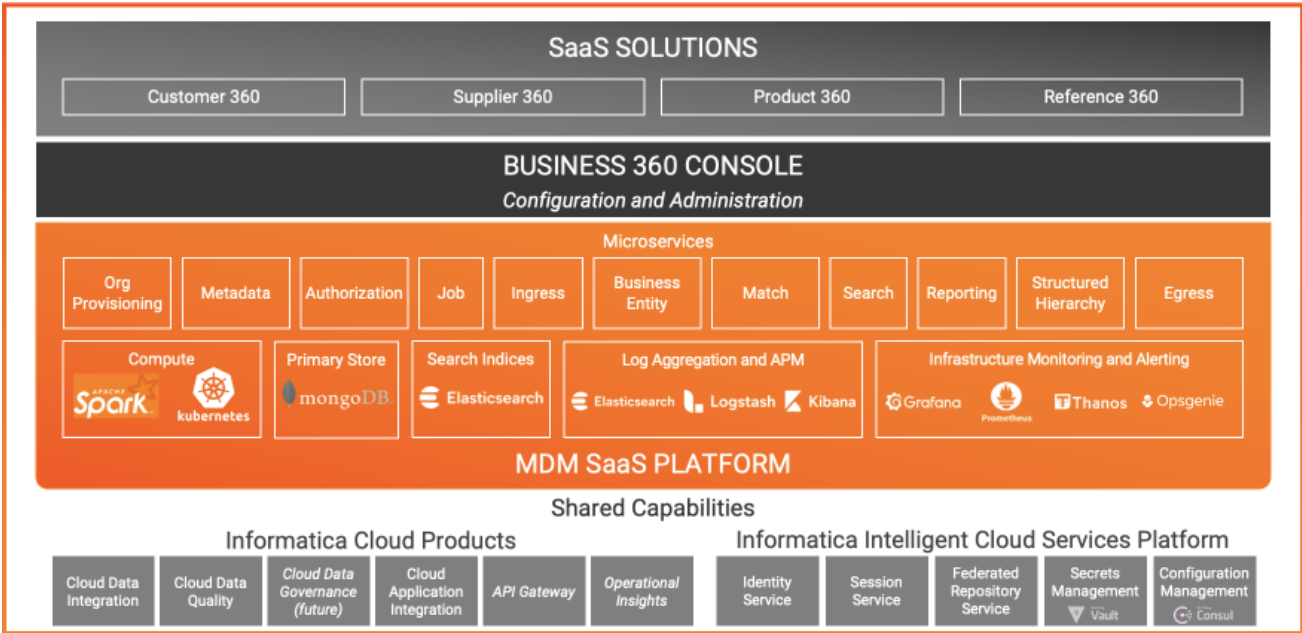
MDM SaaS Data Flow

The following image shows how the data flows in MDM SaaS:



MDM SaaS Components

The following image shows different components in MDM SaaS:



Getting Started with MDM SaaS

To get started with MDM SaaS, perform the following tasks:

1. Provision the organization.
Managed by the Informatica shipping team, and they set up the primary user for each organization.
2. Define the runtime environment or Secure Agents.
3. If you use protective firewall, then add the IP addresses that are specific to your POD to the firewall allow list. For more information, see [Adding IP Addresses to Approved List](#).
4. Set up SSO, user groups, user roles, and users for each organization.
5. Upgrade the organization for any pending release updates.
6. Set up all the business applications, such as Customer 360 SaaS, Supplier 360 SaaS, Product 360 SaaS, and Multidomain MDM SaaS before making any model changes.
7. Define connections before creating a Cloud Data Integration mapping. For more information about configuring a connection, see [Connection configuration](#).
8. Configure other MDM SaaS assets. For more information about the MDM SaaS assets, see the [MDM SaaS documentation](#).

MDM SaaS Connectors

MDM SaaS persists data in MongoDB. You can't directly access the database, but you can access it through the following connectors:

- Business 360
- Business 360 FEP
- Business 360 Events

To ingress data, use Business 360 FEP Connector because it reduces the compute requirement of the Secure Agent and provides huge performance benefits.

To ingress incremental data, schedule to run ingress jobs when no other jobs run. After the ingress job successfully completes its run, you can run a match job. Informatica recommends that you run an ingress job through REST API instead of Business 360 Console.

To egress data, use the Business 360 Connector.

MDM SaaS Prerequisite Questionnaire

The prerequisite questionnaire provides the Informatica team with some basic idea on the implementation requirements before they get engaged.

The following table lists the questions for which the Informatica team requires answers:

Question	Answer
What are the domains you need to master? For example, Insurance, Retail, and Finance.	
What are the data sources for which you require connections to ingress or egress data?	
How many records do you expect to load into	

MDM SaaS during the initial load process?	
What is the approximate count of the incremental daily, weekly, or monthly count of records that you will load into MDM SaaS for the batch processing?	
What is the expected volume of records that you want to process in real time?	
Do you require any extensions from Informatica? For more information about the supported extensions, see the MDM SaaS documentation .	

Frequently Asked Questions about Upgrade

Review the following frequently asked questions to understand more about the upgrade process:

- **When should I upgrade my business applications after the monthly release has been applied to my POD?**
Immediately after the administrator gets notification in Business 360 Console.
- **What happens when I don't upgrade my business applications for months?**
Informatica recommends that you upgrade your business application as soon as possible. The upgrade is a seamless process that might take 5-10 minutes.

Additional Artifacts

You can use the following additional artifacts to understand different modules of MDM SaaS:

- [Video about the match and survivorship process](#)
- [Video to integrate MDM SaaS with Salesforce](#)

Environment Status Information

Informatica performs monthly maintenance tasks on Informatica Intelligent Data Management Cloud to apply changes to the platform and to other services.

To find the release schedule and plan, see the [Informatica status portal](#).

You can subscribe to updates on the page to get timely and critical updates about Informatica Intelligent Data Management Cloud.