

High Level Solution Description

This solution migrates reference data sets (RDS) and corresponding code lists from one “Source” org to another “Target” org. This will be very handy when customers want to migrate these components from one environment to another environment as part of SDLC.

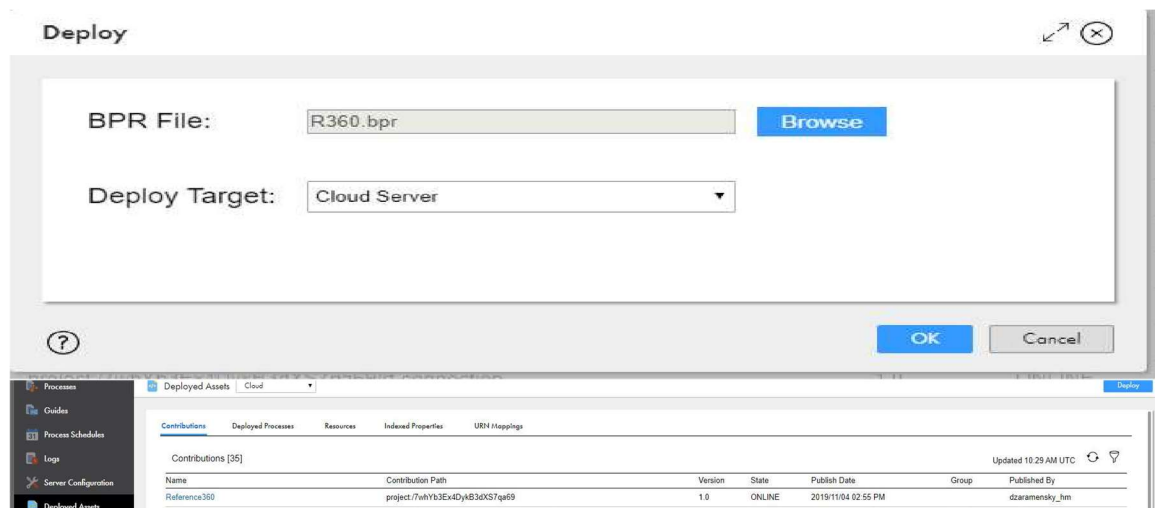
This solution expects that all the Cloud Application Integration (CAI) components will be deployed within the source org and only one process will be deployed within the target org. Once implemented, a CAI guide will help to do the entire migration process where users may select which all RDS and code lists need to be migrated and based on that selection the solution will do the entire migration activity. Please follow all the steps as described in following sections in given sequence.

Deployment of a wrapper process in target Org

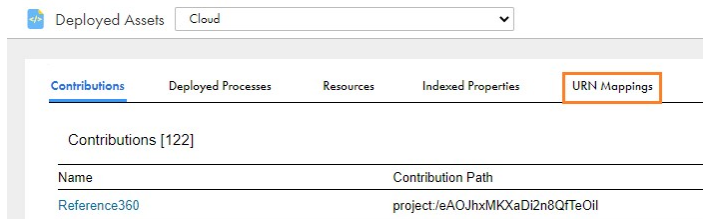
First you need to deploy a process in the “target” org where reference data will be imported. This process is a wrapper process on top of the OOTB Import API. This is needed to be able to call the Import process from CAI.

You will find a *Reference360_Import_Wrapper.bpr* file along with this package. Follow the steps below to deploy the wrapper process.

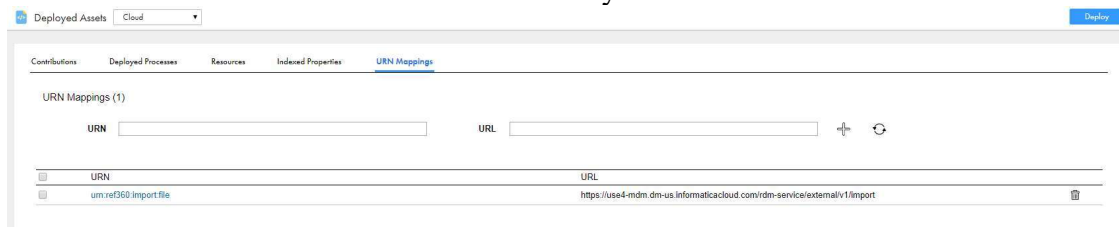
- Log in to Informatica Intelligent Cloud Services using Target Org account which has administrative privileges
- Select Application Integration Console
- Select Deployed Assets
- In the upper-right corner of the page, click Deploy
- Click Browse to select the .bpr file
- Choose Cloud Server
- Click OK (There will be one warning – ignore that)



- Click on URN Mapping tab



- For URN copy paste this value: urn:ref360:import:file
- For URL copy paste this value: <https://use4-mdm.dm-us.informaticacloud.com/rdm-service/external/v1/import>
Note – This is a sample URL – you need to update the URL, as per your IICS environment (mainly the highlighted parts)
- Click on the “+” button to add this entry

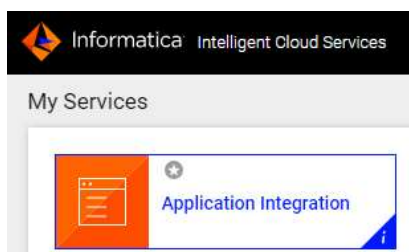


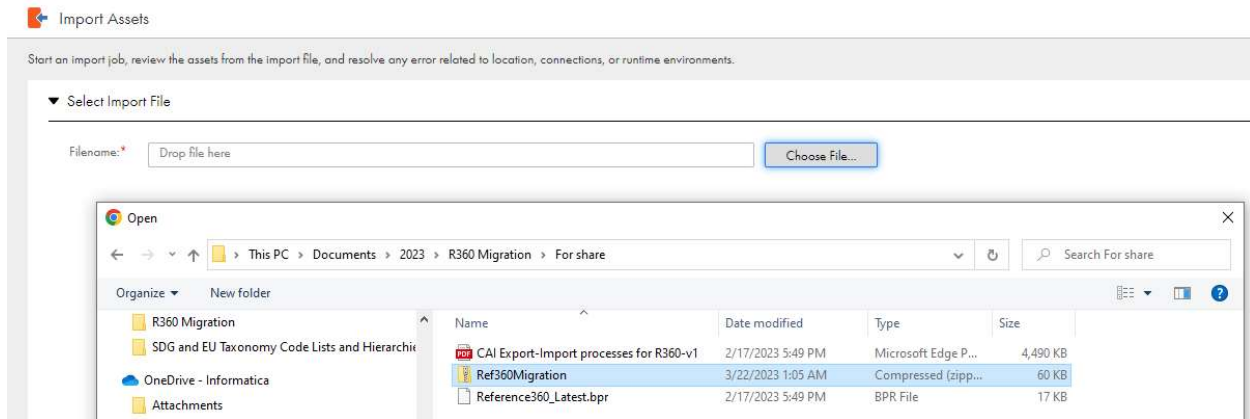
Import of CAI components within Source Org

As a prerequisite to execute this solution, you will need a user account both for source and target org which has certain roles assigned. Below roles are mandatorily needed –

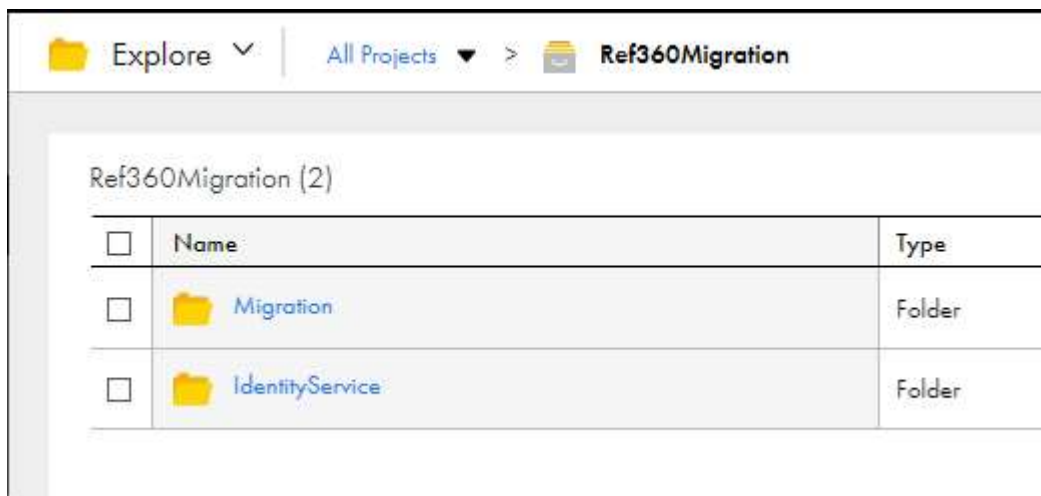
Enabled	Role Name	Description
<input type="checkbox"/>	Admin	Role for performing administrative tasks for an organization. Has full access to all licensed se...
<input checked="" type="checkbox"/>	Application Integration Business ...	Role used for business managers
<input checked="" type="checkbox"/>	Application Integration Data Vie...	Role used for granting access for data
<input checked="" type="checkbox"/>	Application_Administrator	null
<input type="checkbox"/>	Business360ProcessExecutor	null
<input type="checkbox"/>	Business_Steward	null
<input type="checkbox"/>	Customer 360 Analyst	Customer 360 role for Analysts.
<input type="checkbox"/>	Customer 360 Data Steward	Customer 360 role for Data Stewards.
<input type="checkbox"/>	Customer 360 Manager	Customer 360 role for Managers.
<input type="checkbox"/>	Data Integration Data Previewer	Role to preview data
<input type="checkbox"/>	Data Integration Task Executor	Role to run Data Integration tasks
<input type="checkbox"/>	Dataloader Admin	Role for the Dataloader Admin User.
<input type="checkbox"/>	Deployer	Role used by deployer
<input type="checkbox"/>	Designer	Role for creating assets, tasks, and processes. Can configure connections, schedules, and ru...
<input type="checkbox"/>	Governance Administrator	Governance Administrator role for Metadata Command Center and Data Governance and ...
<input type="checkbox"/>	Governance User	Governance User role for Metadata Command Center and Data Governance and Catalog ...
<input checked="" type="checkbox"/>	Job Executor	null
<input type="checkbox"/>	Key Admin	Role to manage key rotation settings.
<input type="checkbox"/>	MDM Business User	Role that provides access to Business User applications.
<input type="checkbox"/>	MDM Designer	MDM Designer
<input type="checkbox"/>	Monitor	Role used for application monitor
<input type="checkbox"/>	Operator	Role used for monitoring execution environments
<input type="checkbox"/>	Product Initiator	
<input type="checkbox"/>	Product reviewer	
<input checked="" type="checkbox"/>	Reference 360 Administrator	Role for configuring the Reference 360 environment.
<input checked="" type="checkbox"/>	Reference 360 Business Analyst	Role for viewing and exporting reference data values, crosswalks, and hierarchies.
<input checked="" type="checkbox"/>	Reference 360 Business Steward	Role for creating and managing reference data values, crosswalks, and value mappings. Ca...
<input checked="" type="checkbox"/>	Reference 360 Planner	Role for creating and managing hierarchies. Can assign users access to hierarchies.
<input checked="" type="checkbox"/>	Reference 360 Primary Owner	Role for defining and configuring reference data structures. Can propose changes to data va...
<input checked="" type="checkbox"/>	Reference 360 Stake Holder	Role for contributing changes to reference data values.

Login to Source Org and open Cloud Application Integration (CAI). Then click on Explore then click Import. Upload the provided *Ref360Migration.zip* file.





After you import the configuration zip file, it will create following directory structure.



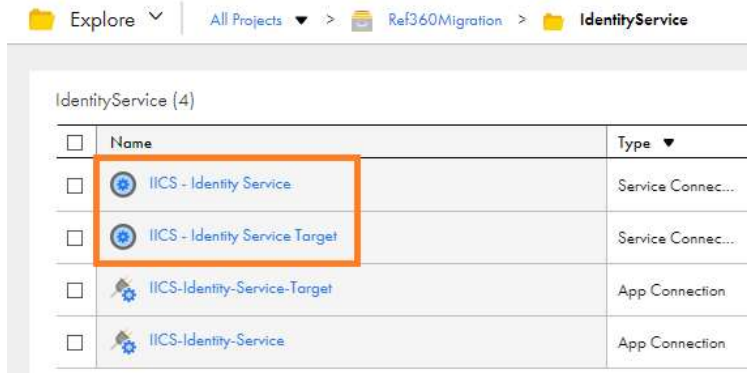
Identity Service folder will contain connectors related IICS login for the source and target org.

Migration folder will contain all the core components related to Ref360 model and data migration.

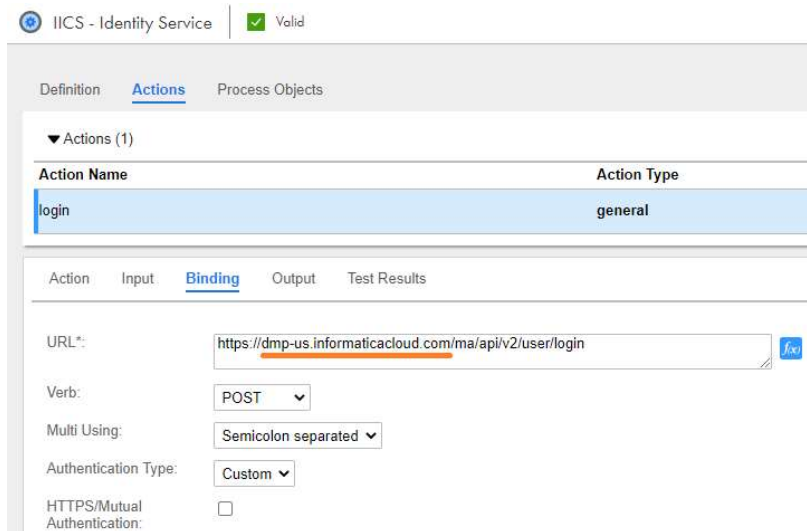
Overall comment: This utility is built in an org which is within preview POD. Please update all the base URLs within the service connectors as per the Org and POD details where it will be deployed.

Updates needed in Identity Service folder:

For the two service connectors, update the base URL –



Example -



After changing the base URL for both the service connectors, Save and Publish.





Next open each of the App Connectors and change the username and password for source and target orgs.

IICS-Identity-Service – This will contain credentials for source org (from where components will be migrated)

IICS-Identity-Service-Target - This will contain credentials for target org (where components will be migrated to)

Explore ▾ | All Projects ▾ > Ref360Migration > IdentityService

IdentityService (4)

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	 IICS-Identity-Service-Target	App Connection
<input type="checkbox"/>	 IICS-Identity-Service	App Connection
<input type="checkbox"/>	 IICS - Identity Service	Service Connec...
<input type="checkbox"/>	 IICS - Identity Service Target	Service Connec...

One example –

IICS-Identity-Service Valid

Properties Metadata

Connection Details

Name: IICS-Identity-Service (Unpublish connection to edit name)

Location: Export_Import/IdentityService Browse...

Description:

Type: Export_Import > IdentityService > IICS - Identity Service

Run On: Cloud Server or any Secure Agent

Connection Test: Not Supported

OData-Enabled: Not Supported

Connection Properties

Name	Value
username:	*****
password:	*****

After updating the username and password, Save and Publish. Do these steps for both the connectors.











Updates needed in Migration folder:

After opening the folder, sort the components by "Type". This way it will be easy to update and publish the components in required sequence.



First update the Base URL for each service connector. Open one by one and update the URL as shown in below example.

Explore ▾ | All Projects ▾ > Ref360Migration > Migration

Migration (28)

<input type="checkbox"/>	Name	Type ▾
<input type="checkbox"/>	 GetCodeLists	Service Connec...
<input type="checkbox"/>	 ExportRDSModel	Service Connec...
<input type="checkbox"/>	 ImportRDSModel	Service Connec...
<input type="checkbox"/>	 GetCodelistName	Service Connec...
<input type="checkbox"/>	 GetReferencedCodeLists	Service Connec...
<input type="checkbox"/>	 GetTargetRDSList	Service Connec...
<input type="checkbox"/>	 Import to Target Codelist	Service Connec...
<input type="checkbox"/>	 GetTargetCodeLists	Service Connec...
<input type="checkbox"/>	 Ref360-Export	Service Connec...
<input type="checkbox"/>	 GetRDSList	Service Connec...

Example –


 GetCodeLists |  Valid

Definition **Actions** Process Objects

▼ Actions (1)

Action Name	Action Type
GetCodeLists	general

Action Input **Binding** Output Test Results

URL*: 



Verb:

Multi Using:

Authentication Type:

HTTPS/Mutual Authentication: ☐

There is only exception for “Import to Target Codelist”. Here you need to update the base URL and the Target Org ID as shown below. This service connector calls the wrapper process for Import which we deployed within the Target org at the beginning of this document. Basically, this service connector will stay within source org, but will call a service which is deployed in target org.


 Import to Target Codelist  Valid

Definition **Actions** Process Objects

▼ Actions (1)

Action Name	Action Type
Import R360	general

Action Input **Binding** Output Test Results

URL*:
https://usw1-cai.dmp-us.informaticacloud.com/active-bpel/public/services/REST/IQYv0LbroOwqTqihXT0hqQ/ImportFile 

Verb:
POST ▼

Multi Using:
Comma separated ▼

Authentication Type:
Custom ▼













HTTPS/Mutual Authentication:
☐

For each service connector, after changing the URL, Save and Publish.

Next, simply publish all the App Connections except Email-Notification. It will need some updates.

Explore ▾ | All Projects ▾ > Ref360Migration > Migration

Migration (28)

<input type="checkbox"/>	Name	Type ▲
<input type="checkbox"/>	 AC-GetRDSList	App Connection
<input type="checkbox"/>	 AC-GetReferencedCodeLists	App Connection
<input type="checkbox"/>	 AC-GetTargetRDSList	App Connection
	 Email-Notification	App Connection
<input type="checkbox"/>	 AC-GetCodeLists	App Connection
<input type="checkbox"/>	 AC-GetCodelistName	App Connection
<input type="checkbox"/>	 AC-Ref360-Export	App Connection
<input type="checkbox"/>	 AC-ImportRDSModel	App Connection
<input type="checkbox"/>	 AC-GetTargetCodeLists	App Connection
<input type="checkbox"/>	 AC-ExportRDSModel	App Connection
<input type="checkbox"/>	 AC-ImportToTargetCodelist	App Connection

For Email-Notification we need to provide all the required SMTP details corresponding to customer's mail server. Also, it will need a secure agent to run on.

Note – this is not mandatory for actual Ref360 migration. Email is sent at the end when all migration is done.

Properties

Metadata

Name*

Email-Notification

Location:

Ref360Migration\Migration

Browse...

Description:

Type*

IICS Cloud Application Integration Email Service (Licensed for use)

Run On:

infaw2k12

Connection Test:

Not Supported

OData-Enabled:






Not Supported

Connection Properties

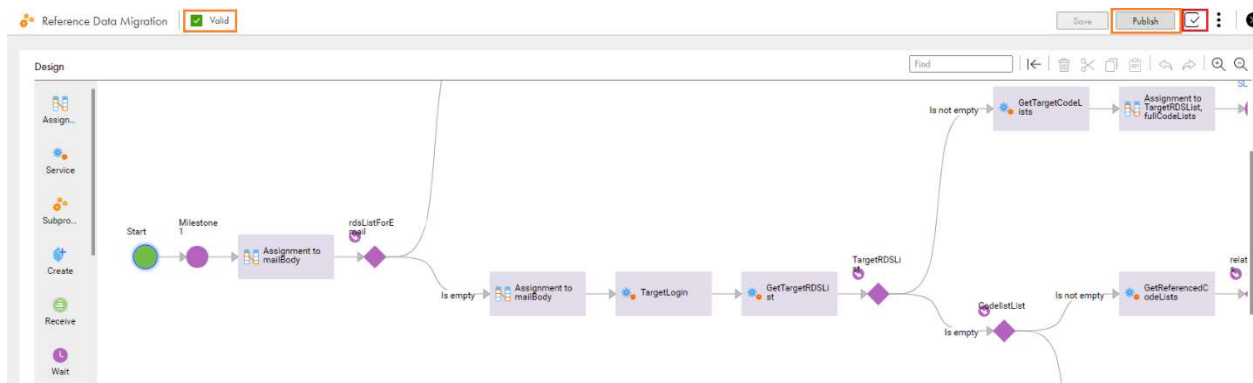
Name	Value
Authentication:*	Enable
Host*	
	This property is required.
Port:*	465
User Name:	
Password:	
Security:*	SSL
Connection Timeout:	30000
Test Email Address :	
From Email Address :	


Next open each of the processes and verify if the process is showing as “Valid”. If so, then Publish.

If all the previous components have been Published successfully, then processes should show as valid.

<input type="checkbox"/>	 Target - Import Code Values Into R360	Process
<input type="checkbox"/>	 Reference Data Migration	Process
<input type="checkbox"/>	 Send Email	Process
<input type="checkbox"/>	 Reference Model Migration	Process
<input type="checkbox"/>	 Single Reference Data Migration	Process

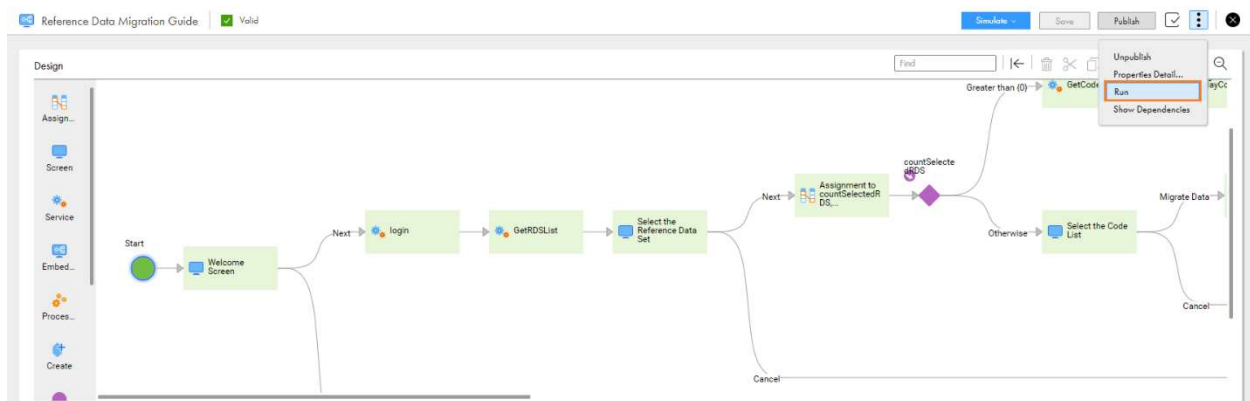
Example –



If any process shows as “Invalid”, click on the Validation  button to identify where the problem is.

Once all the processes are Published, last open the guide and do similar validation and Publish.

Once the guide is Published, Run the guide as shown below -



It will open up the guide and initiate the required migration.