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# Design and Development: MDM SaaS UI – Part 3

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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.

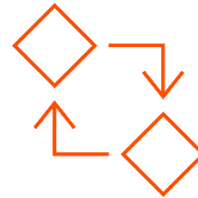
# Feature Rich Success Portal



**Bootstrap trial and  
POC Customers**



**Enriched Customer  
Onboarding  
experience**



**Product  
Learning Paths  
and Weekly  
Expert Sessions**



**Informatica  
Concierge**



**Tailored training  
and content  
recommendations**

# More Information



## Success Portal

<https://success.informatica.com>



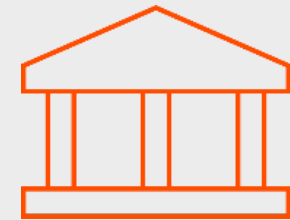
## Communities & Support

<https://network.informatica.com>



## Documentation

<https://docs.informatica.com>



## University

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

# Safe Harbor

The information being provided today is for informational purposes only. The development, release, and timing of any Informatica product or functionality described today remain at the sole discretion of Informatica and should not be relied upon in making a purchasing decision.

Statements made today are based on currently available information, which is subject to change. Such statements should not be relied upon as a representation, warranty or commitment to deliver specific products or functionality in the future.

# Agenda

- 1 Design C360 user interface, components, pages
- 2 Error Handling
- 3 DaaS (Address, Phone, Email) in UI Applications
- 4 Using CAI for tasks & workflow
- 5 Localization
- 6 Search Configuration
- 7 Reports in MDM SaaS

# Why C360 user interface???

The screenshot displays the Informatica Life Sciences 360 interface for a Health Care Professional (HCP) named Deborah Allison Levine. The interface is organized into several sections:

- Header:** Informatica Life Sciences 360, Customer 360, New visual experience, HCP, Deborah Allison Levine, PROD - Pharma Demo.
- Left Navigation:** New, Home, Search, File Import, Workflow Inbox, Hierarchies, My Jobs, Reports.
- Profile Card:** Deborah Allison Levine, MD, (734) 647-5299, 1500 E Medical Center Drive, Ann Arbor, Michigan, United States. HCP Type: Health Care Professional, Overall Status: Active.
- Office Hours (5):**

Day	Hours
Mon	8:00 AM-5:00 PM
Tue	8:00 AM-5:00 PM
Wed	8:00 AM-5:00 PM
Thu	8:00 AM-5:00 PM
Fri	8:00 AM-5:00 PM
- General Information:**

First Name: Deborah	Middle Name: Allie
Last Name: Levine	Full Name: Deborah Allison Levine
Designation: MD	Birth Date: 03/03/1973
Gender: Female	Marital Status: Married
Salesforce ID: 0038G000001qooQQAQ	Publish Indicator: <input type="checkbox"/>
- Specialty (2):**

Specialization_Code	Spec Name	Board Certification Flag	Specialty Ranking
General Care	Medical Doctor - Specialty U...		
Internal Medicine	Internal Medicine		
- Sample Eligibility (1):**

Hours	Consent	License Status	Sanctions
		Y	
- DEA Information (1):**

DEA Number	Drug Schedule	Expiration Date	Effective Date
- HCP Spending:** A bar chart showing spending by type: Consulting Fee (highest), Facility Fees, Food and beverage..., Travel and lodg... (lowest).
- Conditions Treated (12):** Pneumonia, Septicemia, Intestinal Obstruction, Chronic Bronchitis, Overweight and Obesity, Atrial Fibrillation and Atrial FL..., Iron Deficiency Anemia, Arterial Thromboembolic Dis...

Repetitive Data

Duplicate Data

Customized UI

Enhance Data Quality

# Customer 360 UI

Informatica Customer 360 <http://host/app/c360/> Organization: Search alpha\_org

App ID = c360 Page = record details page saved in FRS

**Layout Comp = "summary"**

**Record Details** | Source Records | Hierarchy

**Image**  
**Tony Howard Stark**  
 tonaystark@mail.com  
 fields 9876543215  
 Address Line 1, California, United States  
 Facebook | LinkedIn | Twitter

**Address** 1:N Field, show-as List  
**Office** Primary  
 Address Line 1 | Address Line 2 | Address Line 3  
 City | California | United States | 7890  
 07/01/2021

**Home**  
 Address Line 3  
 City | Hawaii | United States | 45678  
 07/01/2021 | 07/30/2021

**Phone** 1:N Field, show-as Cards  
 Cell Primary  
 9876543215 Business  
 07/28/2021  
 LandLine Primary  
 9876543210 Personal  
 07/01/2021

**Email** 1:N Field, show-as Grid  
 Usage Type Default Indicator Electronic Address\*  
 Business  tonaystark@mail.com

**Identifier**  
**Social Media**  
 Facebook https://facebook.com  
 Twitter https://twitter.com  
 LinkedIn https://linkedin.com

**Employment**

**Component** Completeness 95% Validity 95% Overall Data Quality

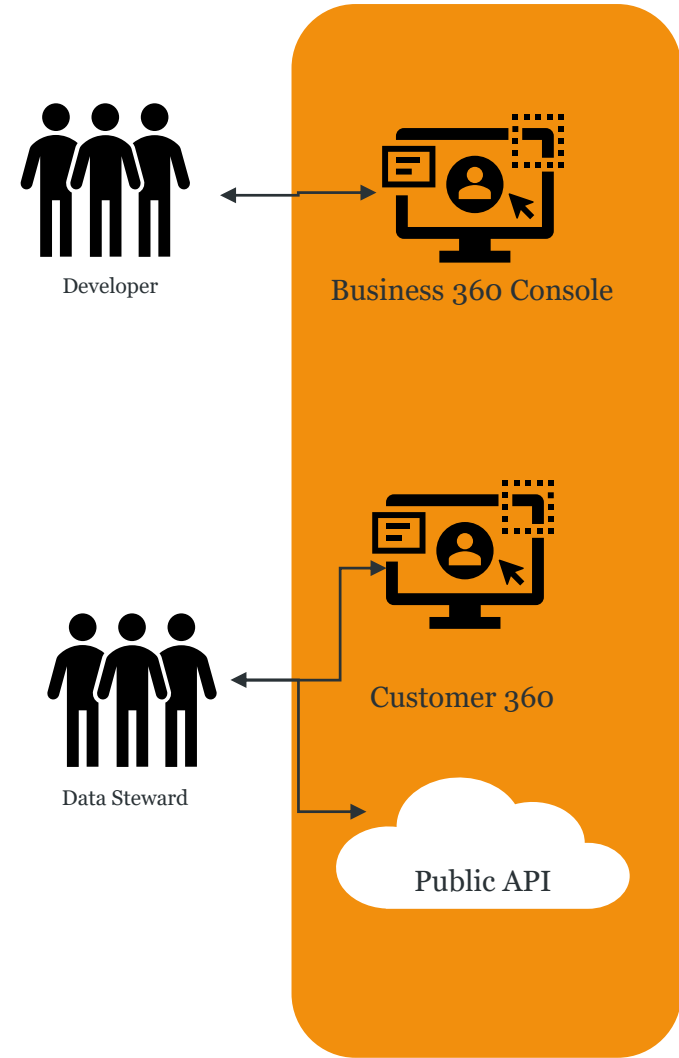
**Purchases by Product Category**  
 component  
 300  
 200  
 100  
 0  
 180 \$ 150 \$ 200 \$ 250 \$ 160 \$ 130 \$

**Lifestyle Indicator**  
 component  
 50 100 150 200 250  
 ● Classical music listener  
 ● Decision Maker  
 ● Rock music listener  
 ● Movie Maniac

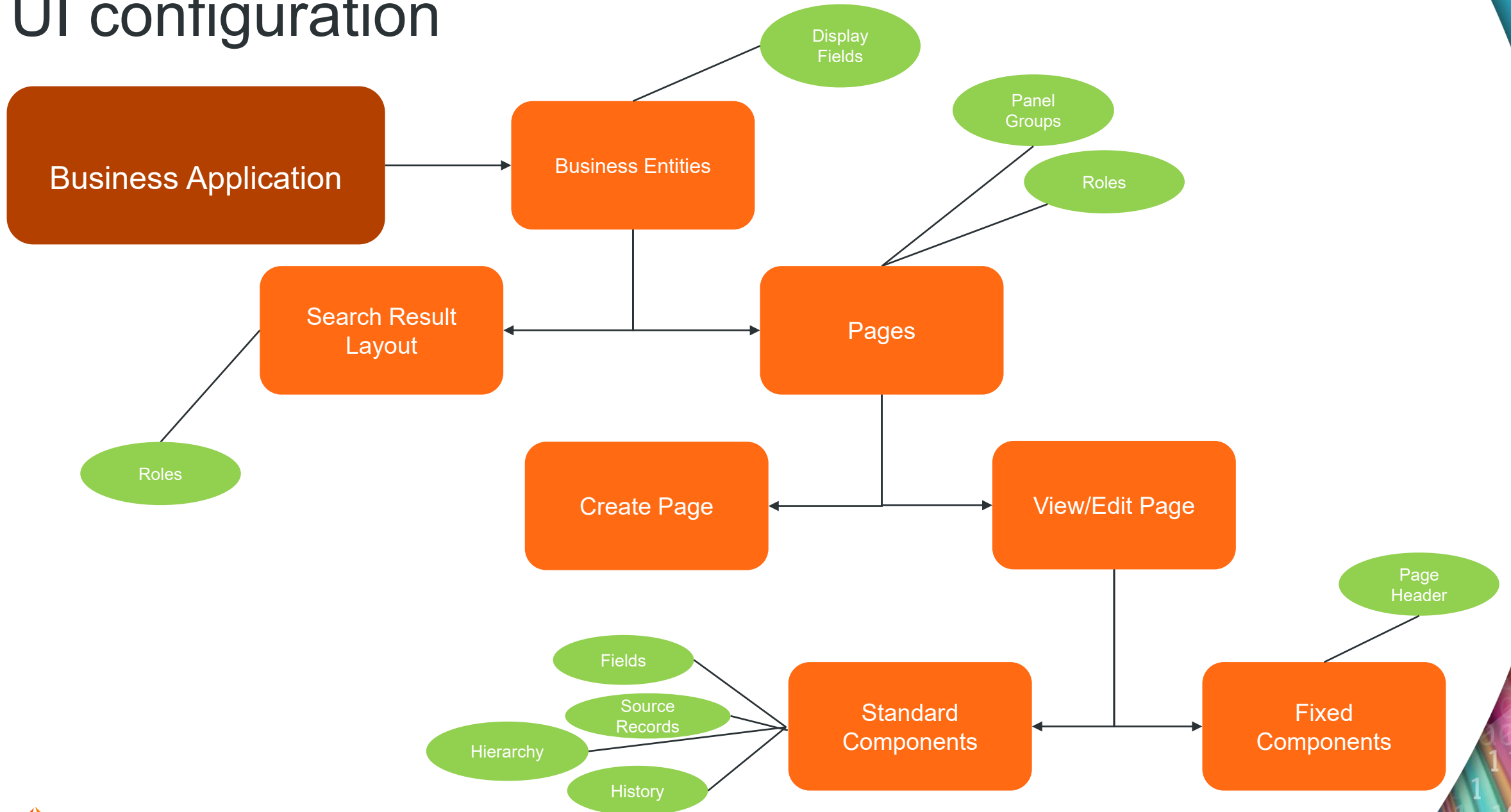
**Platinum component**  
**Business Professional component**

Customer Since: Jul 19, 2021  
 Years: 0 Months: 0 Days: 0

**General Information** a single field  
 Full Name: Tony Howard Stark  
 First Name: Tony  
 Middle Name: Howard  
 Last Name: Stark  
 Suffix Name: Sr.  
 Title: Iron Man  
 Designation: CEO  
 Birth Date: 10/15/1990  
 Gender: Male  
 Marital Status: Married



# UI configuration



# Key Points

- Configure custom fields in View and Edit pages.
- Maximum of 1000 picklist values
- Validation based DQ rule fields should be part of page layout.
- Business360ProcessExecutor role required with custom role for below tasks to be visible :
  - Workflow Inbox
  - Hierarchies
  - File Import
  - My Jobs

# Error Handling

- Flag erroneous incoming data
- Store bad data separately
- Report/Search on bad data
- Configure Error Severity.
- Enabled at Business Entities

**Person Report**  
Name: person\_report  
Author: anjls Entity: f

Condition Validation

Char: Configure the message to display and the percentage to downgrade the trust score when the

Error Severity ? Information

Error Message\* Information  
Warning  
Error

Downgrade Trust Score On ? Last Name be 4  
be 3

Downgrade Trust Score (%) ? 100

# Validation States

State	Description
VALID	The master record is considered to be valid. All survived fields are valid, AND All mandatory fields have a value
INVALID (Has Failures)	The master record has some issues At least one survived field has failed an associated validation, OR One or more mandatory fields are missing For any validation state we have the following metadata : <ul style="list-style-type: none"><li>• The type of the error</li><li>• The severity of the error</li></ul>
PENDING	The record is not yet validated. There are changes that are pending and not yet persisted.

# Record status information

⋮

## Master

```
  "businessEntity": "c360.person",  
  "businessId": "MDM0000000EZP0G",  
  "state": "ACTIVE",  
  "validation": "FAILED",  
  "consolidation": "MATCH_INDEXED",  
  "createdBy": "anjhawar_p01",  
  "creationDate": 1734342734110,
```

## XREF

```
  "businessId": "MDM0000000EZP0G",  
  "businessEntity": "c360.person",  
  "createdBy": "anjhawar_p01",  
  "creationDate": 1733733278180,  
  "updatedBy": "anjhawar_p01",  
  "lastUpdateDate": 1733733278180,  
  "states": {  
    "base": "ACTIVE",  
    "consolidation": "CONSOLIDATED",  
    "createMode": "REGULAR",  
    "searchIndex": "SEARCH_DIRTY",  
    "validation": "FAILED"  
  },
```

Note : Not all flags are relevant to all the records.  
Some states apply to XREF, while others are specific to the master.

# Filtering Error Records

**Search** > **Search For Person : \***

### Filters

**Validation Status**

- All 2935
- Validation Errors 4
- Valid 2931

**Error Type**

- All 4
- Error 4

**Errors**

- All 4
- Custom Mapping ... 1
- Enter A Valid Value. 1
- Invalid Email 1

### Search Results: \* (Showing 4 c

**Applied Filters** Error Type : Error

- John Doe**   
**Business ID:** MDM000000EZPOG
- Abhinav Kumar**   
**Business ID:** MDM000000F29LS
- J Benton**   
**Business ID:** MDM000000F3JWI
- Sathish Yadav**   
**Business ID:** MDM000000FPUDC

# Key Points

- ✓ Track validation status in history.
- ✓ Export Error Records.
- ✓ Validation pop up on Submit.
- ✓ Master validation status is determined based on Survivorship.
- ✓ Purge on existing BE required to enable Error Remediation.

# DaaS (Address, Phone, Email) in UI Applications

DaaS(Data as a Service) provides on-demand access to data via the cloud, enabling businesses to consume and manage data without owning the infrastructure

- ✓ **Global address verification**  
Enriching address data.
- ✓ **Email verification**  
Validate Email Addresses.
- ✓ **Phone number validation**  
Validate Phone Numbers.




# Configuration

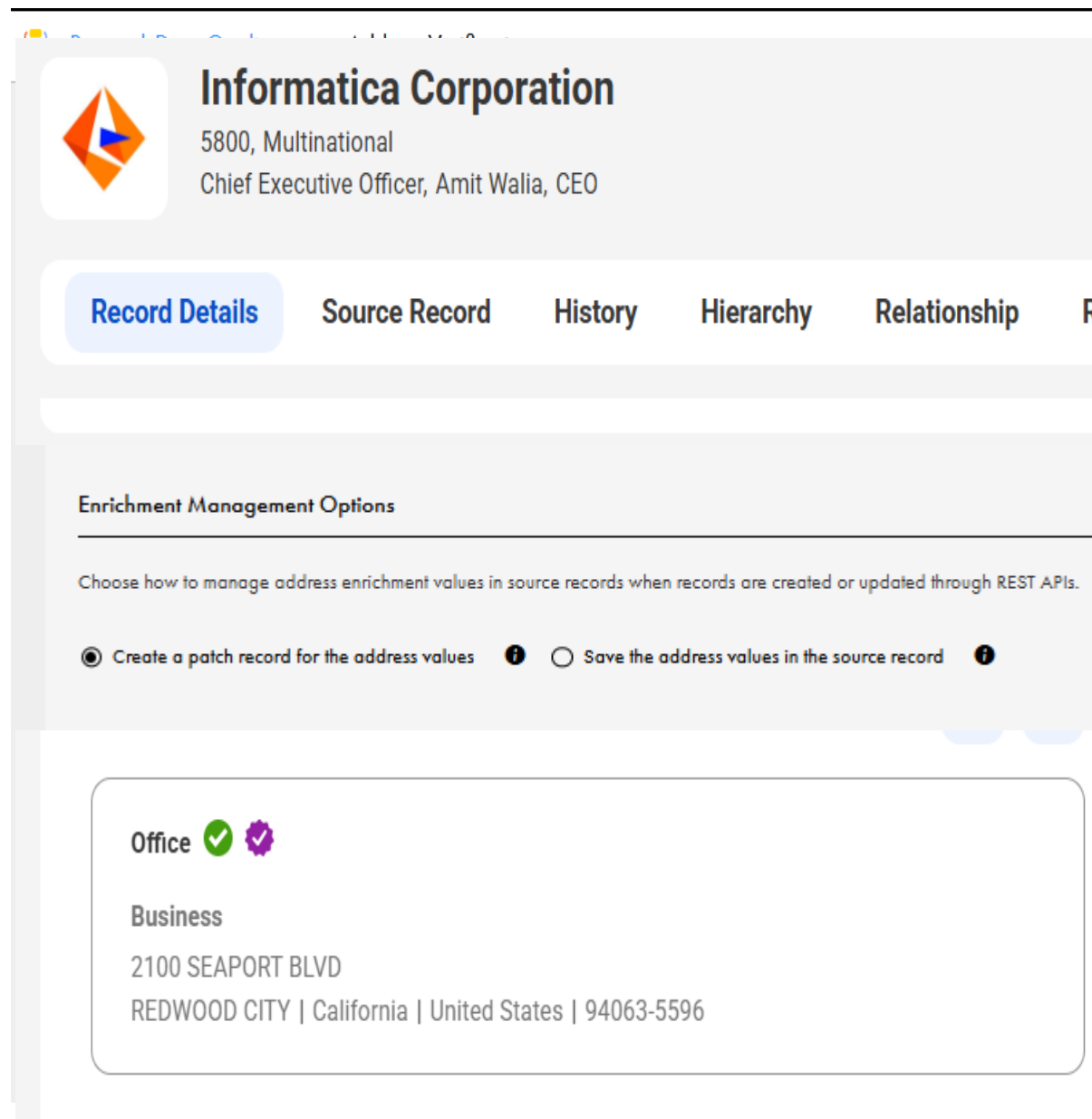
- ✓ Configure Licenses
- ✓ Enrich Address smart fields in batches or real time.
- ✓ For Custom FG, only real time Address DaaS could be configured.
- ✓ Validate and enrich Phone and Email smart fields in real time.

The screenshot shows the 'Business 360 Console' interface for configuring a 'Person' model. The top navigation bar includes 'Person' and a 'Valid' status indicator. Below this, there are tabs for 'Model', 'Data Flow', and 'Consumption'. Under 'Data Flow', there are sub-tabs for 'Attributes', 'Data Quality', 'Match', 'Survivorship', and 'Events'. The 'Data Quality' tab is active, showing a visual representation of smart fields: 'Basic Fields', 'Phone', 'Email', and a plus sign icon. Below this, the 'Properties: Phone' configuration panel is visible. It has three main sections: 'General', 'Data Quality', and 'Survivorship'. The 'Data Quality' section is expanded, showing the following settings:

- Enable DaaS Validation
- Validation Type:  Real-time
- Error Severity: Information
- Error Message: Invalid Phone Number
- Downgrade Trust Score (%): 100

# Address DaaS

- ✓ Downgrade Trust scores for invalid addresses for batch verification.
- ✓ Trust is downgraded by 70% for invalid address in real time.
- ✓ Validation would be done after submit.
- ✓ Enriched Address could be saved as Source or as a new Patch for Real Time.
- ✓ For Valid Addresses we get 



The screenshot shows a web interface for an address record. At the top, there is a header for "Informatica Corporation" with its logo, address "5800, Multinational", and CEO "Chief Executive Officer, Amit Walia, CEO". Below this is a navigation bar with tabs: "Record Details" (selected), "Source Record", "History", "Hierarchy", "Relationship", and "R...". The main content area is titled "Enrichment Management Options" and contains a description: "Choose how to manage address enrichment values in source records when records are created or updated through REST APIs." There are two radio button options: "Create a patch record for the address values" (selected) and "Save the address values in the source record". Below this is a rounded rectangular box containing the address details: "Office" with a green checkmark and a purple checkmark icon, "Business", and the full address "2100 SEAPORT BLVD, REDWOOD CITY | California | United States | 94063-5596".

# Email and Phone Verifier (Real Time)

- ✓ Configure real time validation phone and email smart fields.
- ✓ Format check for email and phone.
- ✓ Domain check for email.
- ✓ Downgrade trust invalid Email and Phone numbers.

**Properties: Email**

**General**

**Data Quality**

**Survivorship**

**DaaS** Change Order...

Enable DaaS Validation

Validation Type  Real-time

Error Severity

Error Message\*

Downgrade Trust Score (%)

Incomplete Number

# Key Points

- ✓ Don't rename license file.
- ✓ Mandatory to map Country field for Address Verification.
- ✓ Phone number must include the country code.
- ✓ DQ Rule configuration w.r.t. DaaS

	DaaS Batch		DaaS Real time	
	Enabled	Disabled	Enabled	Disabled
Address(Smart FG)	DQ rule not allowed	Individual DQ rule allowed	Individual DQ rule allowed	Individual DQ rule allowed
Address (Custom FG)	Not Applicable		Individual DQ rule allowed	Individual DQ rule allowed
Phone(Smart FG)	Not Applicable		Individual DQ rule not allowed	Individual DQ rule allowed
Email(Smart FG)	Not Applicable		Individual DQ rule not allowed	Individual DQ rule allowed

# Using CAI for Tasks and Workflows in MDM SaaS

CAI Interface	Invocation Action	Variable Passed	Variable Returned
DQ Rule with external validations	UI/API trigger with Inputs to root or field group records	Input fields to be validated.	Validation status (Success or Error)
Business Events	UI/API trigger with Inputs to root or field group records	Task related Metadata	Workflow Human Task
Guide*	UI click of a Custom button	Business Entity fields	Custom screens for user data entry
Objective Groups	UI/API on click of Submit	Business Entity fields	Enriched entity fields

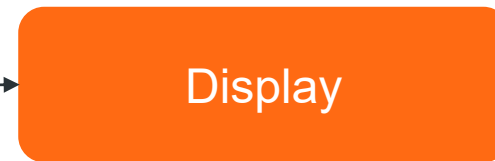
# DQ Rule trigger CAI process- Search Before Create



- Receive the input to search.



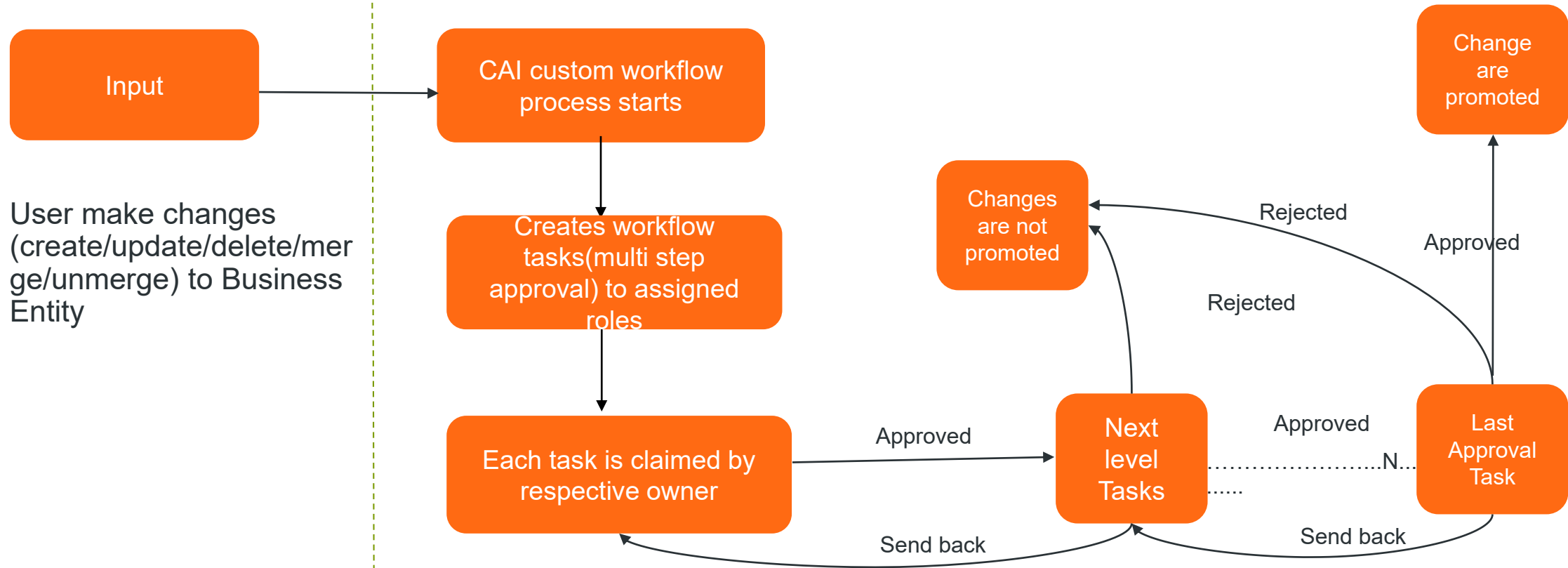
- Form the payload to search the record.
- Search the record using Elastic Search Public API



- Receive the response from the Search API
- If record exists, display the appropriate information of record existence or error out with validation fail.

# Business Events Triggered CAI Process

Client      Cloud Application Integration with Multi step approval process.



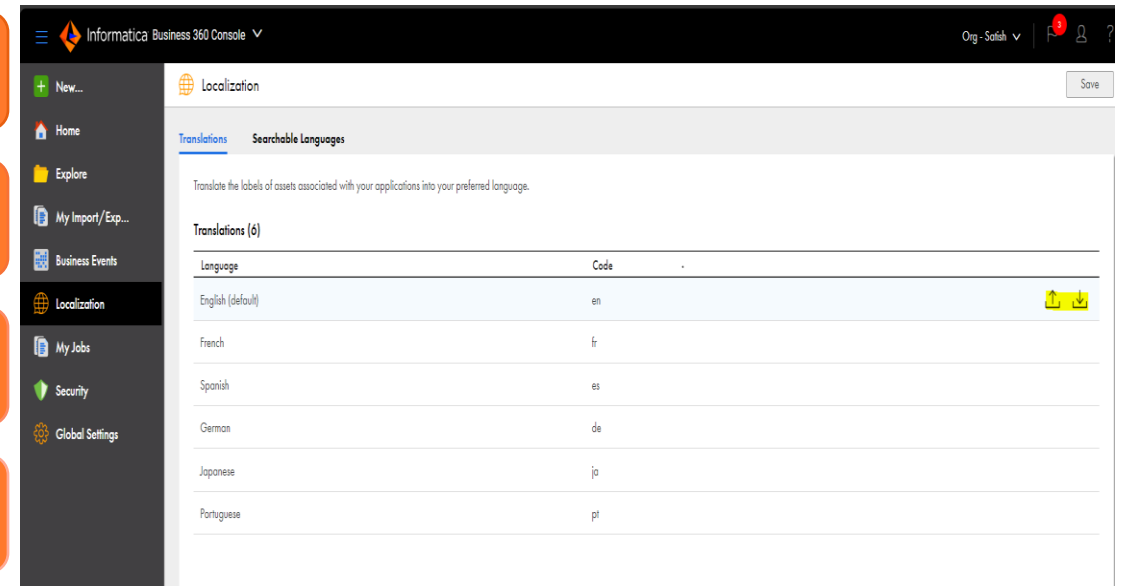
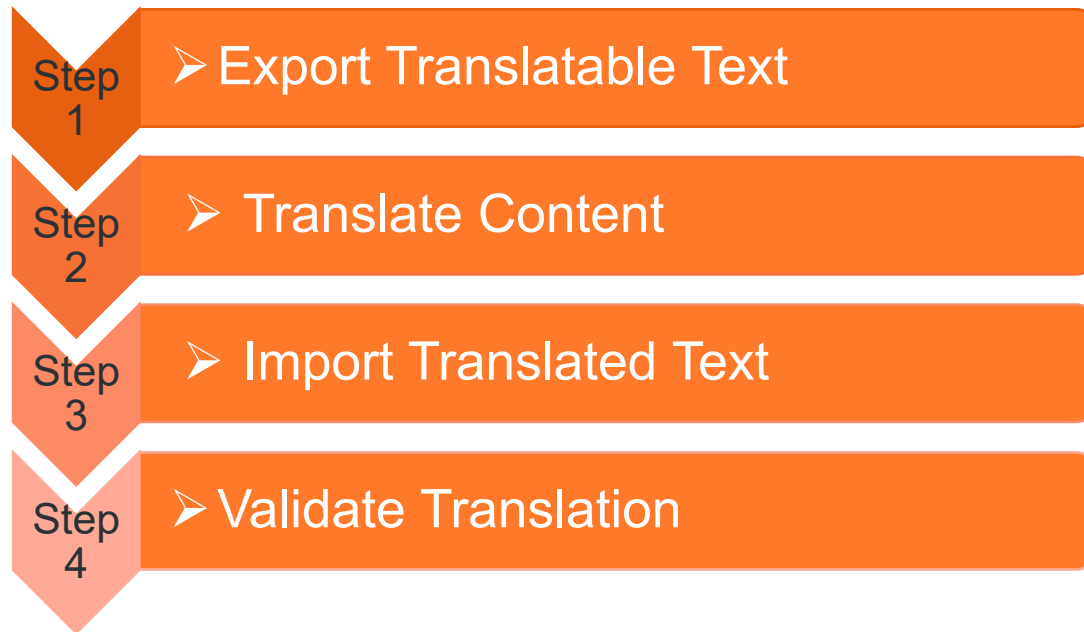
# Localization in MDM SaaS.

## Label Translation

- Translating asset labels
- Supported Languages - English(default), French, Spanish, German, Japanese, Portuguese
- Predefined asset label translations



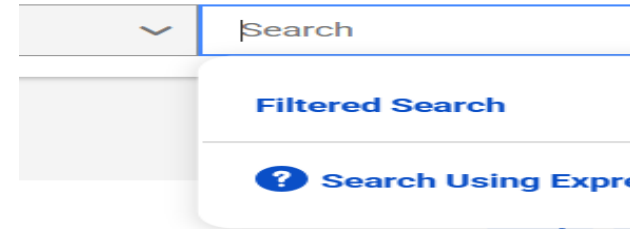
# Steps in the Label Translation Process





Note: Translation is only for Customer 360 application and not for Business 360 applications.


# Search in MDM SaaS UI


- Search across Business Entities or Single Entity
- Global Search
- Filtered search
- Saved search
- Facetable
- Autosuggest.





**Search > New Filtered Search**

**New Filtered Se...**  


**Business Entity:**  
Person 

**Business ID:**  
 





**Record State Indicator:**  
Active 

**Validation Status:**  
 

**Search**

**Search Results: (Showing 7 of 7)** None Selected 

**Filters:** Record State Indicator: Active

<input type="checkbox"/>	> John Smith 	State: California	City: REDWOOD CITY	Country: United States
<input type="checkbox"/>	> Paul Kim 	State: California	City: redwood	Country: United States
<input type="checkbox"/>	> AJ EvePubl 	State:	City:	Country:
<input type="checkbox"/>	> AEvtPublish JTest 	State:	City:	Country:

# Possible ways to search

Search String	Behavior
John Smith	Finds records with "John", "Smith", or variants.
"John Smith"	Matches "John Smith" exactly.
John*	Matches "Johnson", "Johnny", etc.
Jo?n	Matches "John", "Joan", etc.
*	Returns all records.

## Advanced Search Features

Search String	Behavior
Hans && Williams	Finds records with both "Hans" and "Williams".
-John*	Excludes records starting with "John".
/Joan_([0-9]+)/	Matches "Joan_123", "Joan_1", etc.
+Manager +Janet*	Finds "Manager" and "Janet*" in the same record.

# Multilingual Search

- Setup at Org Level.
- Japanese is supported at this point.
- Applicable for **text fields**. Not for System fields.
- The fields must be searchable to enable multilingual search.
- Fallback Language would always be English

The screenshot displays the Informatica Business 360 Console interface. The top navigation bar shows 'Informatica Business 360 Console' and 'Org - Satish'. The left sidebar contains navigation options: New..., Home, Explore, My Import/Exp..., Business Events, Localization, My Jobs, Security, and Global Settings. The main content area is titled 'Localization' and includes a 'Translations' tab and a 'Searchable Languages' section. The 'Searchable Languages' section contains the text 'Add your preferred languages to search for records in business applications.' and a list of 'Supported Languages (1)' with an 'Add Language' button. The list shows 'English (default)' and a dropdown menu with 'Japanese' selected. Below this, the 'Person' entity is shown as 'Valid'. The 'Data Flow' tab is active, showing 'Attributes' for 'Data Quality', 'Match', 'Survivorship', and 'Ev'. A 'Basic Fields' section shows a 'Text' field type and a 'First Name' field. The 'Properties: First Name' section lists 'Data Quality' and 'Search and Rep...' options. The 'Searchable' and 'Multilingual Search' checkboxes are highlighted in yellow.

# Key Points

- Escape wildcard characters to ensure accurate results.
- Guardrails are imposed at 25 searchable fields and 5 autosuggest fields.
- Mandatory to run Search Reindex Job after enabling or disabling Searchable/Multilingual.

## Deprecation Notice

- Fuzzy search capability and Auto-suggest capability to be removed for system field.
- UI restriction to be brought in to disable marking a system field to be marked as searchable without at least 1 data field marked as searchable.

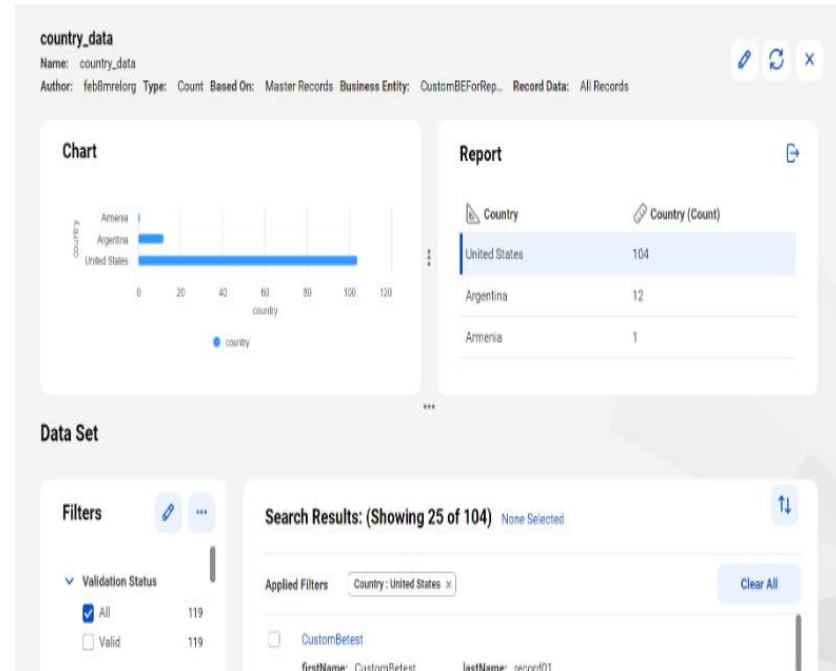
# Reports in MDM SaaS

## Purpose of Reports

- Monitor Key statistics
- Tracking usage metrics such as master/source records and user activity
- Designed to work seamlessly with other components of the platform, such as dashboards and operational insights.

## Pre-defined OOTB Reports

- MDM SaaS product provides 12 pre-define OOTB reports
- Each report can display 500 maximum rows of records



## Custom Reports

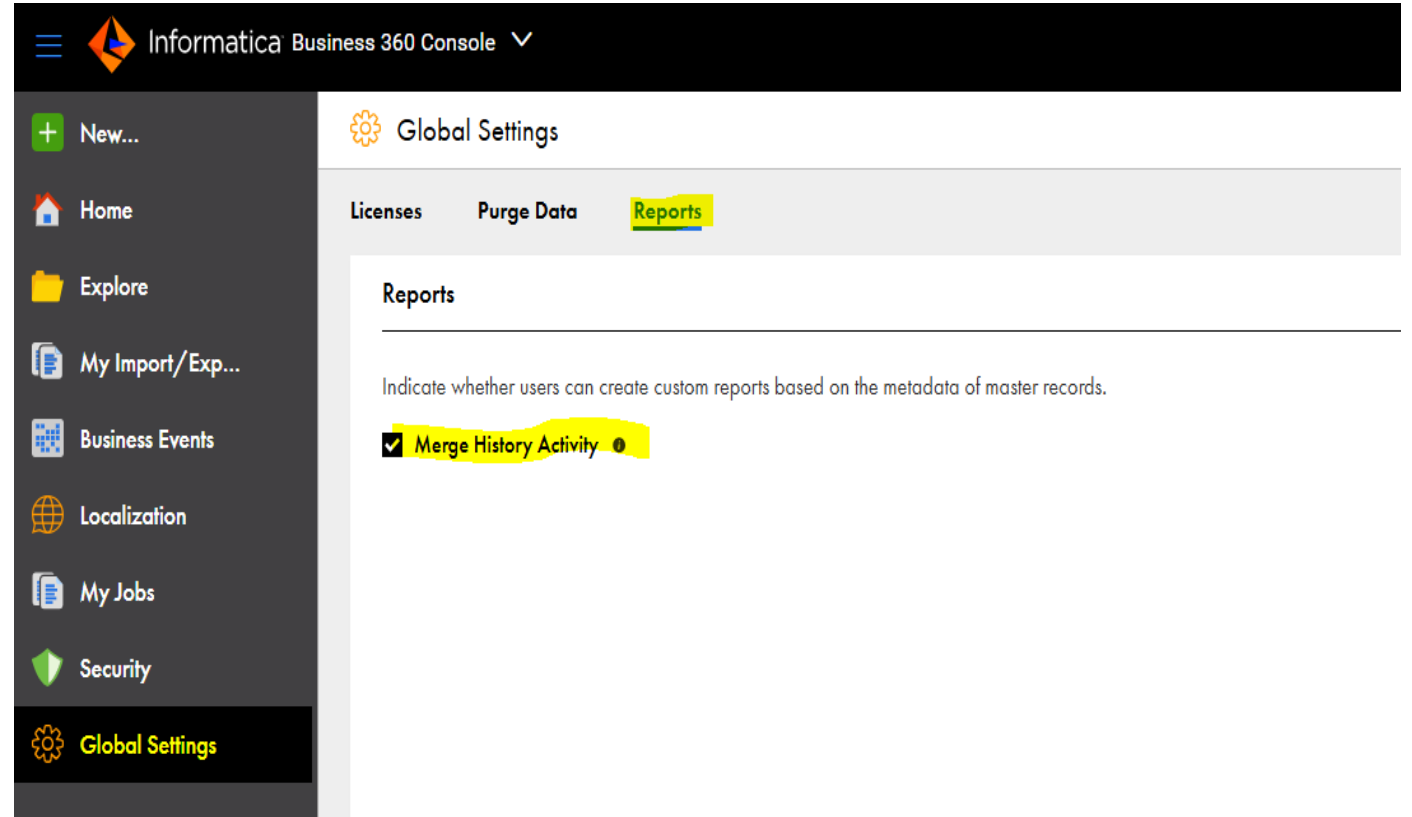
- Customer reports are of 2 types. Reports based on Master a data and reports based on record metadata.
- Configure appropriate fields as reportable when you model a business entity.
- They appear as dimensions and measures when used and created as reports.

# Merge history activity report

**Purpose:** These reports provide details about source records merged to create master records.

**Usage:** Understand the number of records merged by the match process and by users.

**Key Insight:** Helps track and analyze merge activities effectively.



The screenshot displays the Informatica Business 360 Console interface. The top navigation bar includes the Informatica logo and the text "Informatica Business 360 Console". A left-hand sidebar contains a menu with items: "New...", "Home", "Explore", "My Import/Exp...", "Business Events", "Localization", "My Jobs", "Security", and "Global Settings" (highlighted in yellow). The main content area is titled "Global Settings" and features three tabs: "Licenses", "Purge Data", and "Reports" (highlighted in yellow). Under the "Reports" tab, there is a section titled "Reports" with a sub-header. Below this, a descriptive text reads: "Indicate whether users can create custom reports based on the metadata of master records." A checkbox labeled "Merge History Activity" is checked and highlighted in yellow.

# Questions?



# Thank You

Where data & AI come to **LIFE**

