

06 Aug, 2024

# MDM SaaS Best Practices

- Alagar Pitchai, Solution Architect, IPS

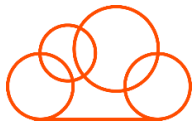
Where data & AI come to 

# 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.

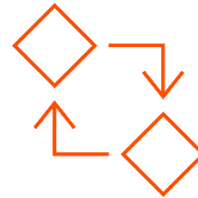
# Feature Rich Success Portal



**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 Data Modeling

2 Data Quality

3 Ingress and Egress Processes

4 Business Events

5 Demo

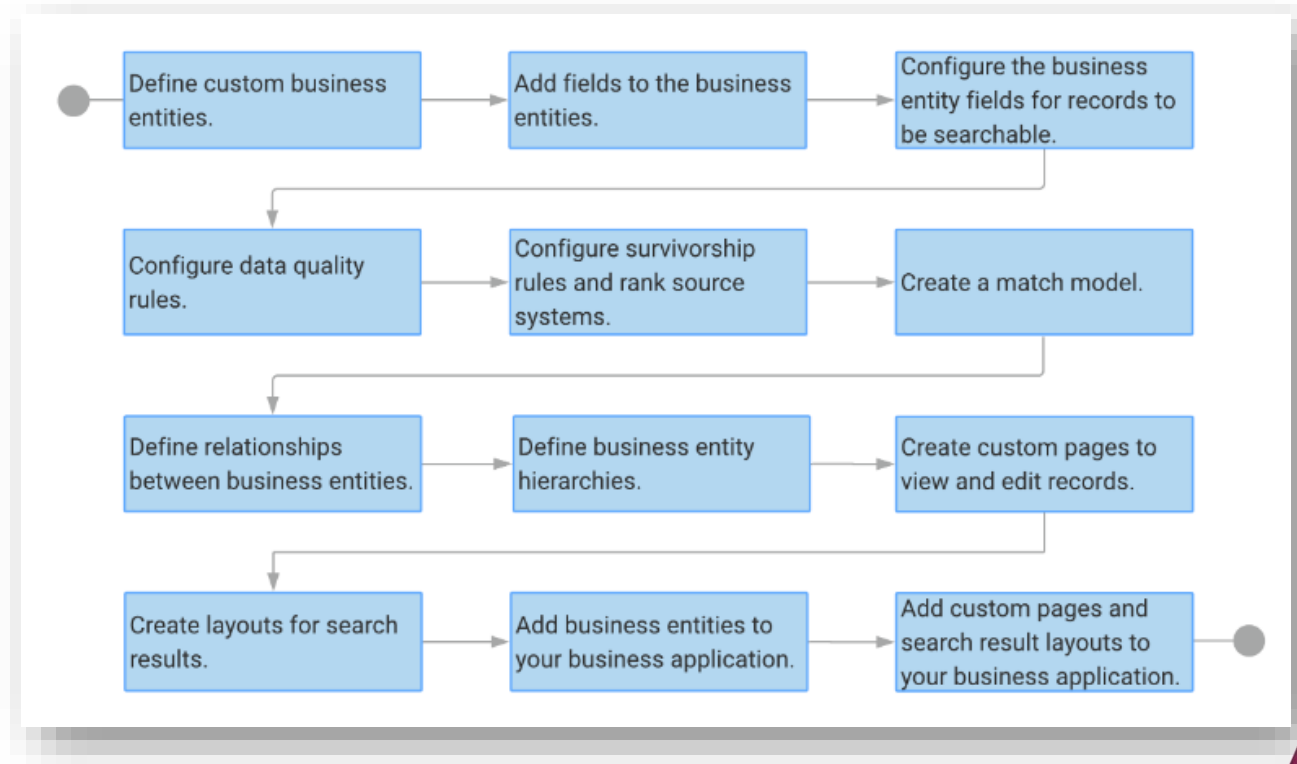
6 Q&A

# Data Modeling – Things to consider

Defining the Data Model is the Critical task for MDM

- Have Clear understanding about Business Objective and Customer Requirements
- Identify the source systems that contributes data to MDM
- Analyze the attributes and Profile the data to construct the data model and data ingestion process
- Make sure that attributes that are selected for MDM are Master Attributes
- Identify the Reference Sets – LoV such as Country, Currency, Gender etc.,

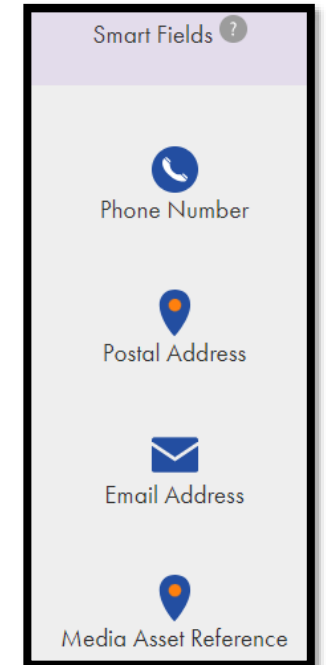
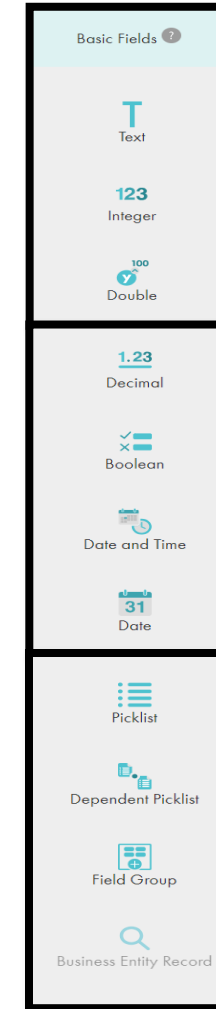
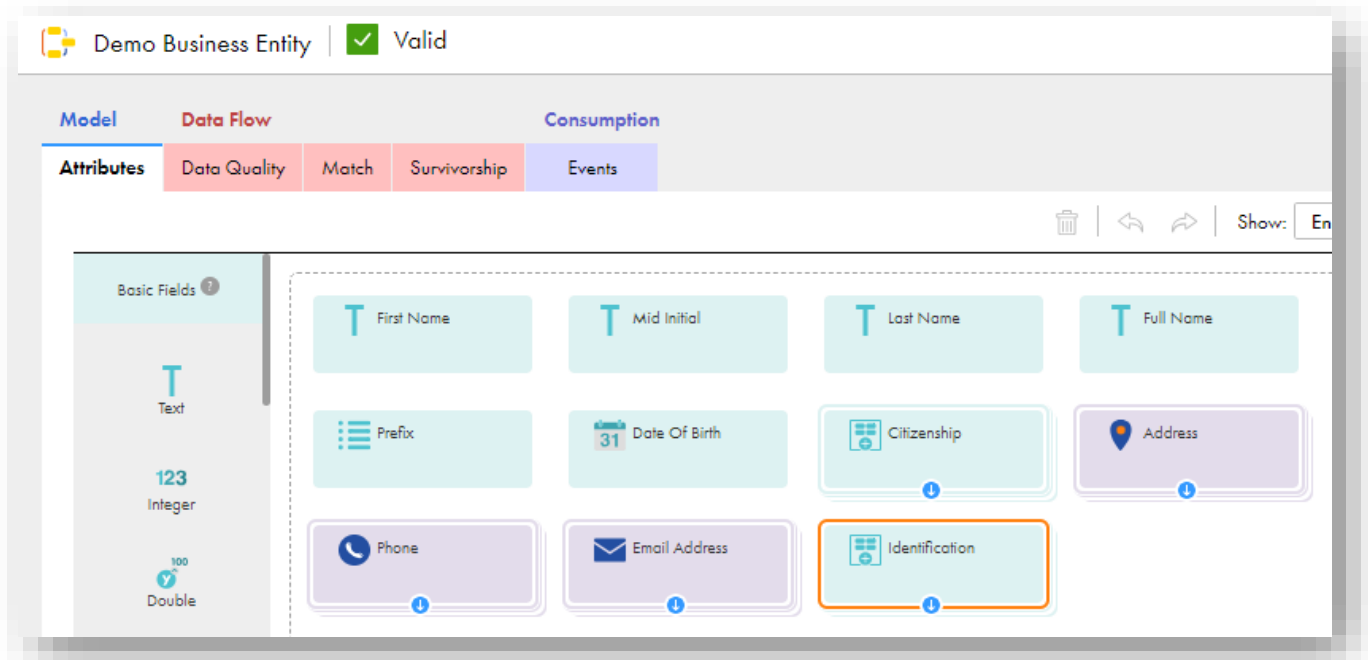
## List of Steps to follow for B360 Application



# Data Modeling – building components

A business entity is an entity of importance to your organization and consists of fields that support your data needs.

Data Modeling is often uses an iterative process. You can come back later to add more fields and to modify or add configurations, such as data quality, search, and survivorship.



# Data Quality – Why its important?

According to Gartner, *“Poor data quality destroys business value. Recent research shows organizations estimate the average cost of poor data quality at \$10.8 million per year.”*

## Analysis:

- This initial profiling helps organizations to identify and understand their source data
- You can associate data quality rules with the business entity fields to cleanse, standardize, or validate the field values.

## Corrective Measures

- When Validation fails, you can downgrade the trust score of the field, and that helps determine the confidence level of the source data.
- You can associate data quality rules such as Standardization, Verifiers based on simple conditions, Cloud Data Quality, and DaaS with business entity fields.

# Data Quality – Key Pointers

General

Enable rule association

Applied Field: First Name

Name\* SpaceCheck

Internal ID SpaceCheck\_1722088036851

Description

Condition Validation

Configure a condition to transform or validate the field values.

Function\* No Spaces

Description

- Maximum Length
- Minimum Length
- Starts With
- Ends With
- No Spaces
- Contains
- Does Not Contain
- Allowed Characters
- Not Allowed Characters
- Regular Match
- External Validation
- Concatenate
- Concatenate With Spaces

One or More DQ rules can be attached to Business Entity Attributes.

There are two types of DQ Rules  
Basic



This option has predefined formulae to transform the data

Advanced



This opens up a lot of options for data validation as it has provision to leverage the CDQ Rules

General

Enable rule association

Run the rule association even if all input fields are empty

Applied Field:\* First Name

Rule Specification:\* RemoveSpaces

Name\* RemoveSpacesfromName

Internal ID RemoveSpacesfromName\_1722088445246

Description

Input and Output Fields Validation

Map the rule specification fields to the business entity fields, or configure values for the business entity fields.

Input Fields

Rule Specification Field	Data Type	Business Entity Field	Value
NewInput1	String	First Name	

Output Fields

Rule Specification Field	Data Type	Business Entity Field
PrimaryRuleSet	String	First Name

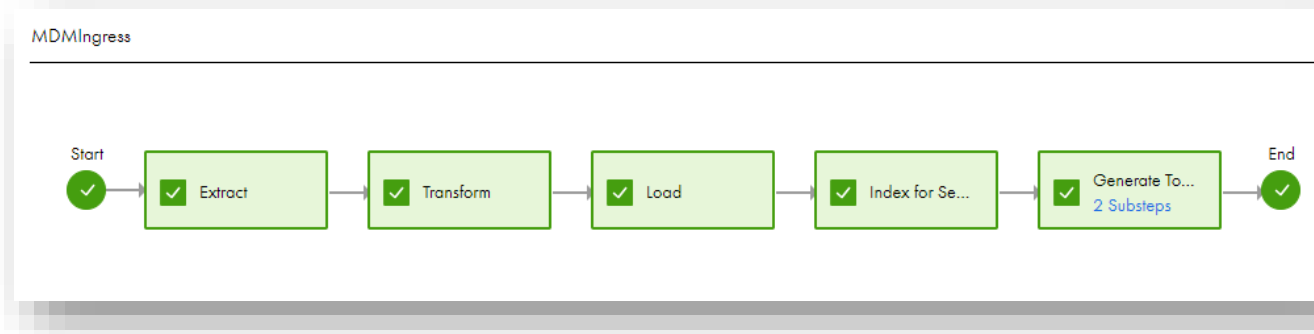
# Ingress

Ingress is a process that imports data from external source systems, masters the data, and stores it in MDM SaaS assets. In this process Target system is MDM SaaS

## Things to consider before Ingestion

- Make sure the Delta Detection happens before loading the data
- Identify the bad data before ingestion and have a process to rectify them

## List of Stages of MDM Ingress Job



## MDM Business Entity node Targets

The screenshot shows a 'Select Target Object' dialog box. It contains a search bar and a list of target objects. The selected object is 'demo\_business\_entity.ci...'. The dialog also includes 'OK' and 'Cancel' buttons.

Select	Name	Label	Description	Type
<input type="radio"/>	demo_business_e...	demo_business_entity		flatmdmentity
<input type="radio"/>	demo_business_e...	demo_business_entity.A...		flatmdmentity
<input type="radio"/>	demo_business_e...	demo_business_entity.S...		flatmdmentity
<input checked="" type="radio"/>	demo_business_e...	demo_business_entity.ci...		flatmdmentity
<input type="radio"/>	demo_business_e...	demo_business_entity.id...		flatmdmentity
<input type="radio"/>	demo_business_e...	demo_business_entity.s...		flatmdmentity

# Egress – Things to consider

Consider the following rules and guidelines when you create an egress job to export data:

- If you change the name of a business entity or delete it in Business 360 Console, the existing mappings with references to that business entity fail when you run the mappings. When you run an egress job that uses these mappings, the job fails.
- If you update source objects in existing mappings, the updates aren't reflected in egress jobs that use these mappings. When you run these egress jobs in Business 360 Console, the mappings use the objects that existed before the updates instead of the new ones. To run the egress jobs with newly added objects, edit and save these egress jobs again in Business 360 Console.

# Egress

## Standard export

Exports all the records in the first run of the job and then exports the records added or updated after the first run incrementally based on the job schedule.

## Custom export

Exports all the records added or modified after the specified date in the first run of the job, and then exports the records added or updated after the first run incrementally.

## Export all

Exports all the records in each run of the job.

## Egress Job Configuration

Process:

Description: Exports data from the Business 360 applications, such as Customer 360, and loads the data to a target data source.

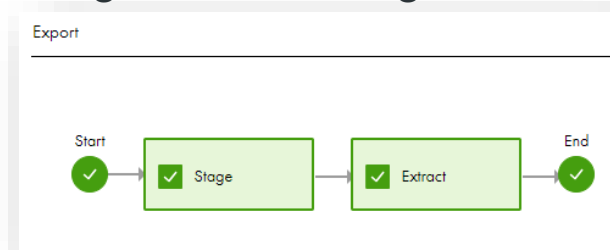
Export Type:

- Standard export
- Custom export
- Export all

Name	Location
No taskflow found. To add a taskflow, click Add Taskflow	

Name	Type	Record T...	Source System	Location
No asset found. To add an asset, click Add Taskflow				

## Stages of MDM Egress Job



# Business Events – Things to know

You can define business events related to actions on business entity records, such as create, update, delete, and merge, to trigger a workflow or publish the events to external targets.

## Types of Events

### User Defined

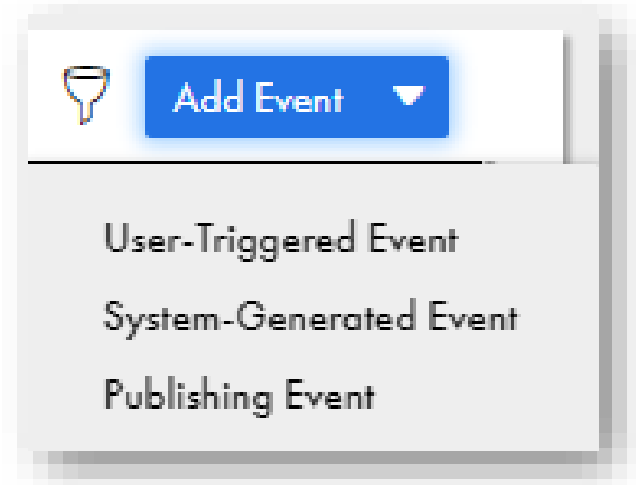
Initiated by the user's action and triggers the workflow for review and approve

### System Generated

Initiated by the system's Match process for users to intervene and take an action on matched records

### Publishing Event

It's a real time event to publish the data to consumers



# Business Events – User Defined & System Generated

1 Event 2 Workflow Tasks 3 Workflow Properties

Define the event details and the scenarios for which the event is published to targets.

### Event Details

Event Type: User-Triggered Event

Display Name: Demo Business Entity Search Event

Internal ID: demo\_business\_entity\_search\_event

Workflow Trigger:  Required  Optional

Affected User Roles: Customer 360 Data Steward

### Event Scenarios

Asset Name	Asset Type	Actions	Fields
Demo Business Entity	Business Entity	Create, Update, Delete	...

## Event Definition

This summary defines the Event – who can initiate event, what would be trigger and related Assets

## Workflow Tasks

This page helps to configure the workflow steps and its approval groups.

1 Event 2 Workflow Tasks 3 Workflow Properties

Select the workflow you want and configure the applicable user roles.

### Workflow

Name: MDM Four Step Approval

### First Review

Approvers: Customer 360 Data Steward

### Second Review

Approvers: Customer 360 Manager

### Third Review

Approvers: Person Lead Data Steward

### Final Review

Approvers: Business\_Steward\_Hierarchy

# Business Events - Publishing Event

Publish events are related to actions such as create, update and delete of the business entity records. These changes will be transmitted real time to the consuming target systems


Define the details of the event and the scenarios for which the event gets published to downstream systems.



dir\_PublishingEvent\_Demo
Update Every: 3. ... X


Last updated on Jul 27, 2024, 4:28 PM

Source



1  
Events

Target



1  
Events

Overview
Alert
Performance
Past Run

Job Name	dir_PublishingEven...	Status	<span style="color: green;">▶</span> Up and Running
Version	1	Duration	00:25:18
Task Type	Streaming Ingestion and Replication Task	Start Time	Jul 27, 2024, 4:03 PM
Task Location	Alagar_WorkSpace/MDM Demo	Runtime Environment	AP_SecAgent_Group
Started By	apitchai	Download Log	Complete <span style="border: 1px solid #ccc; padding: 2px;">v</span>
Secure Agent	AP Sever		

Summary on the Jobs Page



Instance Name	Location	Subtasks	Start Time ↓	End Time	Rows Processed	Status
dir_PublishingEvent_...	Alagar_Work...		Jul 27, 2024, 4:03...		1	Up and Running

# Demo

Where data & AI come to **LIFE**

# Questions?