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Mastering Advanced Data Enrichment: Techniques for Improved Business Outcomes

- Sourya Dass, Principal Customer Success Architect, CSA

Where data & AI come to LIFE

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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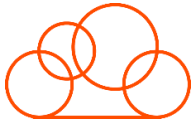
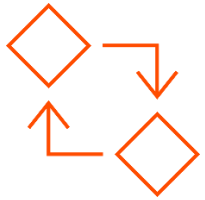


Bootstrap trial and POC Customers

Enriched Customer Onboarding experience



Product Learning Paths and Weekly Expert Sessions

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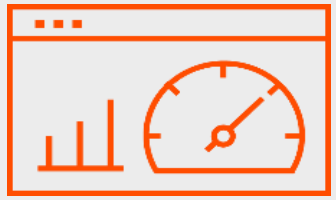
Tailored training and content recommendations

More Information



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Enrichment and Validation Orchestration Framework

Sourya Dass

Principal Customer Success Architect

Where data & AI come to LIFE

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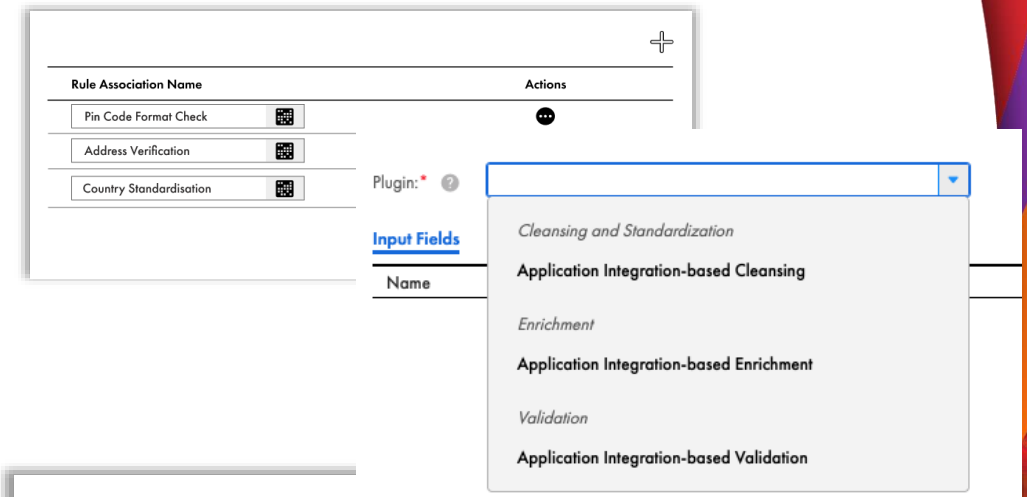
Vision

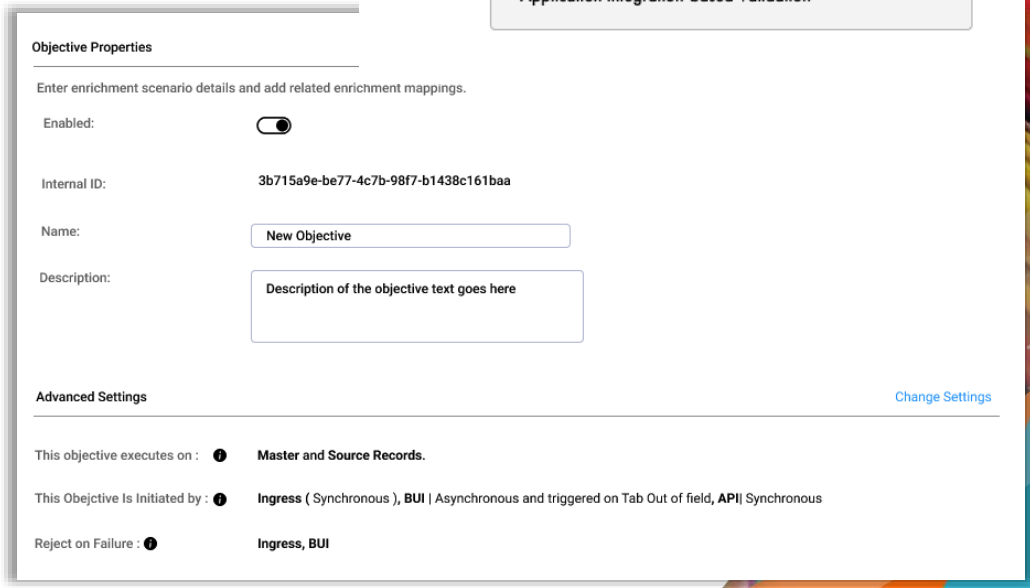
Orchestrate consistent enrichment, validations and recommendations across the full record lifecycle

Enrichment and Validation Orchestration

Orchestration & consistent execution of validations & enrichments

- **Validate & Cleanse data** using the CAI plugin for complex validations and validations using external providers
- **Orchestrate** by combining multiple validations and enrichments into a common Objective, also dependent on data of previous rule
- **Consistently** execute same rules in API and on the User Interface
    - Tailor applicability of rules, e.g. only relevant in the UI, or only masters / source records





Benefit

- Support complex validations with root fields and a field group
- Ability to not downgrading trust score even during failure of select rules optionally

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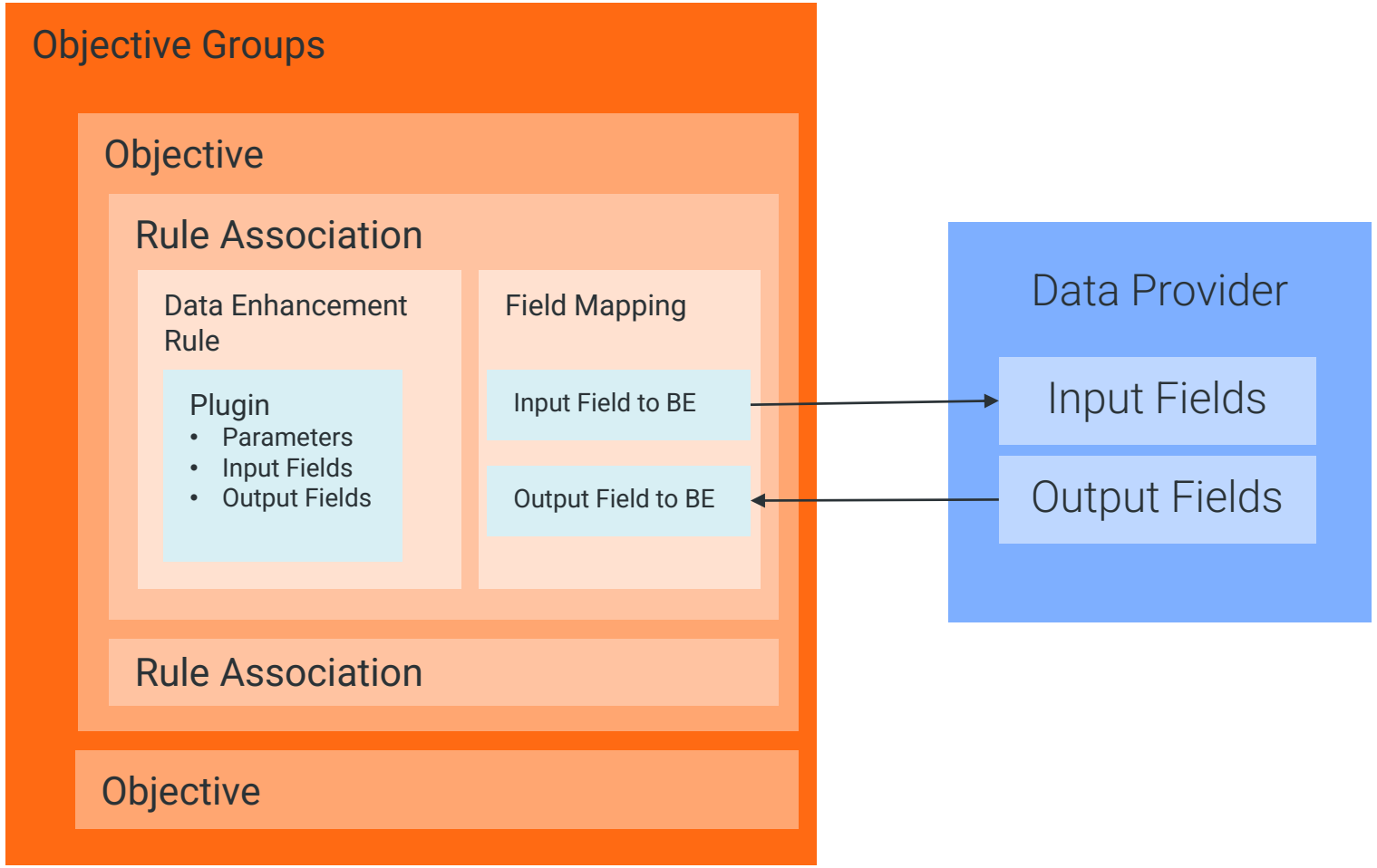
Real time validations support with validation and enrichment framework

- 3rd party Validation and Cleansing
  - New plugins for CAI based Validation and Cleansing
  - Ability to Reference parent field group/root field in a validation rule
  - Downgrade Trust score optionally
- View Data Quality status of a record
- Advanced Configuration for Objectives
  - Run on master and source record types
  - Trigger rules based on field leave, section save or submit on UI
  - Trigger rule via API
- Orchestrate rules that build upon one another (More than one rule in an objective)
- Mapping static values as input or output in rule association

Enrichment and Validation Orchestration Framework

Assets and configuration



Objective Group
Multiple objectives for the same use case, in parallel

(e.g., all that is needed for my Spanish target market)

Objective
Multiple rules can be connected sequentially

(e.g., check current length, then translate long description to Spanish)

Rule Association
Map the rule into the data model

(e.g., translate the long description)

Data Enhancement Rule
Specific enrichment, validation or cleansing

(e.g., translate to Spanish)

Setting up external data providers for data enrichment

You can use the information from external data providers to enrich your records with additional information that's critical for your business. You can integrate data providers with MDM SaaS to enrich records. The packages include instructions on how to import assets and set up data providers.
The following table describes the data providers that you can use:

Data Provider	Description	Information on procuring and setting up assets
Dun & Bradstreet	Enriches organization records with valuable information, such as the financial performance of the organization, details of the parent or child organizations and the key executives of the organization	D&B Direct for Informatica
Global Legal Entity Identifier Foundation (GLEIF)	Provides the Global Legal Entity Identifier (LEI) Index, which contains standardized and high-quality legal entity reference data. Use the Global LEI Index to enrich your legal entity records	Introducing Legal Entity 360 for Banking Banking
MedPro	Enriches records with healthcare provider data from MedPro Systems	Integrating Customer 360 with MedPro Systems
Custom data providers	Enriches records with data from external data providers	Configuring data enrichment

Configuring data enrichment

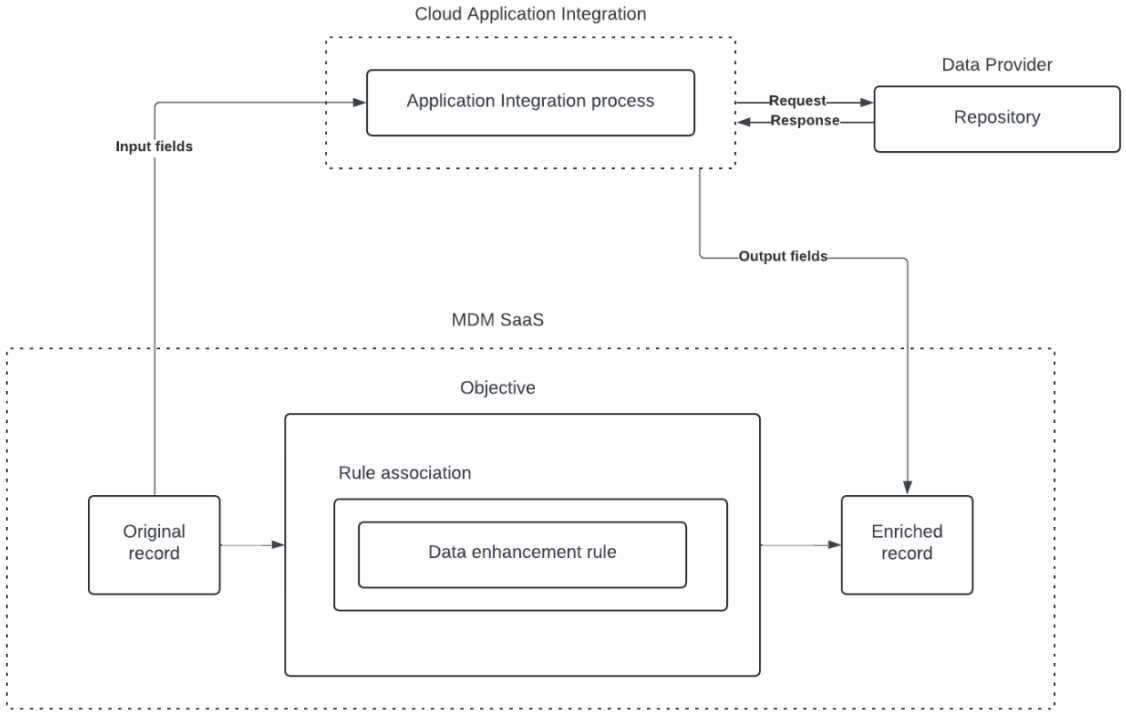
- To enrich your records with additional data from external data providers, configure rule associations. The rule associations specify the type of data enrichment and contain data enhancement rules.
- When you configure data enrichment, you can choose to enrich specific fields of records.

- For example, you can send product descriptions to an external data provider and extract brand names from those descriptions.

- You can also enrich records by classifying them based on the data from an external data provider. For example, to classify product records, you can send a product description to an AI-powered external data provider to get relevant product categories. Based on the product categories that the data provider returns and the existing category records, you can either directly classify the records or present the category records as recommendations to users.

Data Enrichment Architecture

The data enrichment architecture consists of data enrichment configurations, a service such as Informatica Application Integration and an external data provider.
The following image shows a high-level data enrichment architecture:



When you enrich records, MDM SaaS uses an application integration process to connect to an external data provider for enrichment data. The records are then enriched based on the rule associations in MDM SaaS. The rule associations specify the application integration process, the objectives and the type for data enrichment.

Components of data enrichment configuration

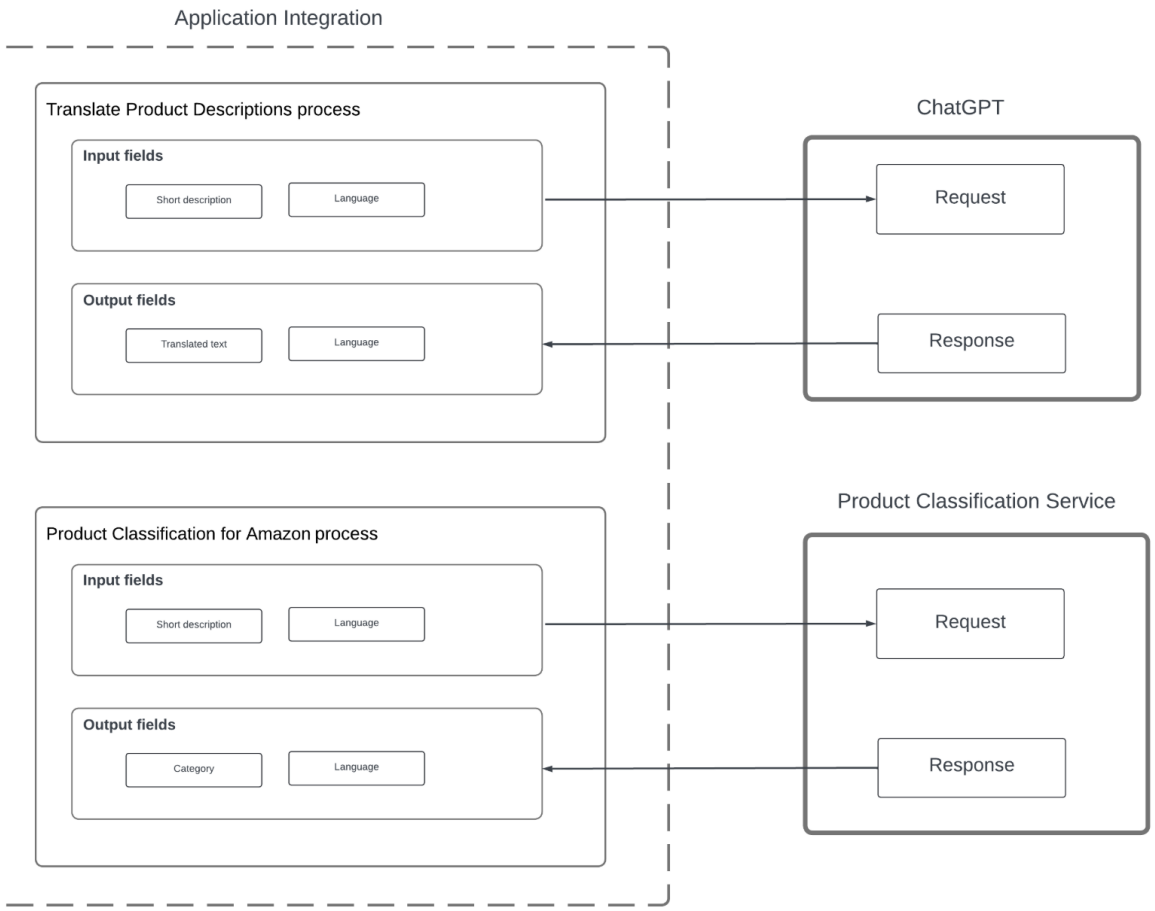
- Before you configure data enrichment, you need to determine the type of enrichment that you want to perform. You can either enrich or classify records based on CLAIRE recommendations. To specify the type of enrichment to perform, configure a data enhancement rule.

- After you create a data enhancement rule with its plugin configuration, you need to map the business entity attributes to the data provider input fields. When data enrichment is triggered, these input fields are sent to the Application Integration process that you specify in the plugin configuration. To specify the fields that you want to enrich, you also need to map the data provider output fields to business entity attributes or relationship nodes in a hierarchy model.To enrich values of records, map the output fields to the business entity attributes. To classify records, map the output fields to the relationship nodes.

- To map the business entity attributes to the data provider input and output fields, you need to create a rule association. A rule association is an MDM SaaS asset that consists of a data enhancement rule and mappings of input and output fields. A data enhancement rule in a rule association determines the input and output fields of the data provider that you can use for field mapping.

- After users update the fields that are part of the input fields in a rule association, MDM SaaS triggers the rule association. The updated field values are sent as a request to the specified data provider, and the data provider returns data for enrichment. The data is used to enrich the business entity fields or hierarchy relationships based on the output field mapping in the rule association.

Data enrichment configuration scenario

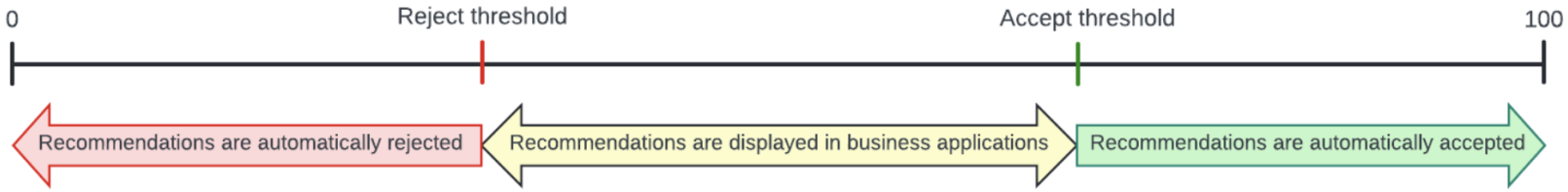


- You work for Acme and want to manage its product information on Amazon. You want to translate the English descriptions of products into French for the customers in France after business users create Item records. To ensure that the products listed on Amazon reflect the correct product classification, you also want to automatically classify the records.
- To translate English product descriptions into French, design a custom process named Translate Product Description in Application Integration. Design the process to send English product descriptions to OpenAI ChatGPT for translation. Additionally, design a process named Product Classification for Amazon to connect to an external service that provides product categories based on product descriptions.
- The image shows how two Application Integration processes connect to two external services

Determining the data enrichment type

You can enrich records based on CLAIRE recommendations.
When you perform recommendation-based enrichment, CLAIRE displays enrichment data as recommendations that are based on confidence scores from data providers. For example, you can send a product description to an AI-powered data provider and request the data provider to suggest brand names based on the description.

The following image shows how the accept and reject thresholds impact the recommendations from a data provider:



- If you set the accept and reject thresholds to zero, the data from the data provider is automatically accepted and applied.
- If the confidence score is above the accept threshold, the data from the data provider is automatically accepted and applied.

- If the confidence score is within the accept and reject thresholds, CLAIRE displays recommendations in business applications for users to accept or reject them. If you specify an accept threshold value greater than zero and the response from the data provider doesn't contain confidence scores, CLAIRE displays all the recommendations.

Features applicable to data enrichment

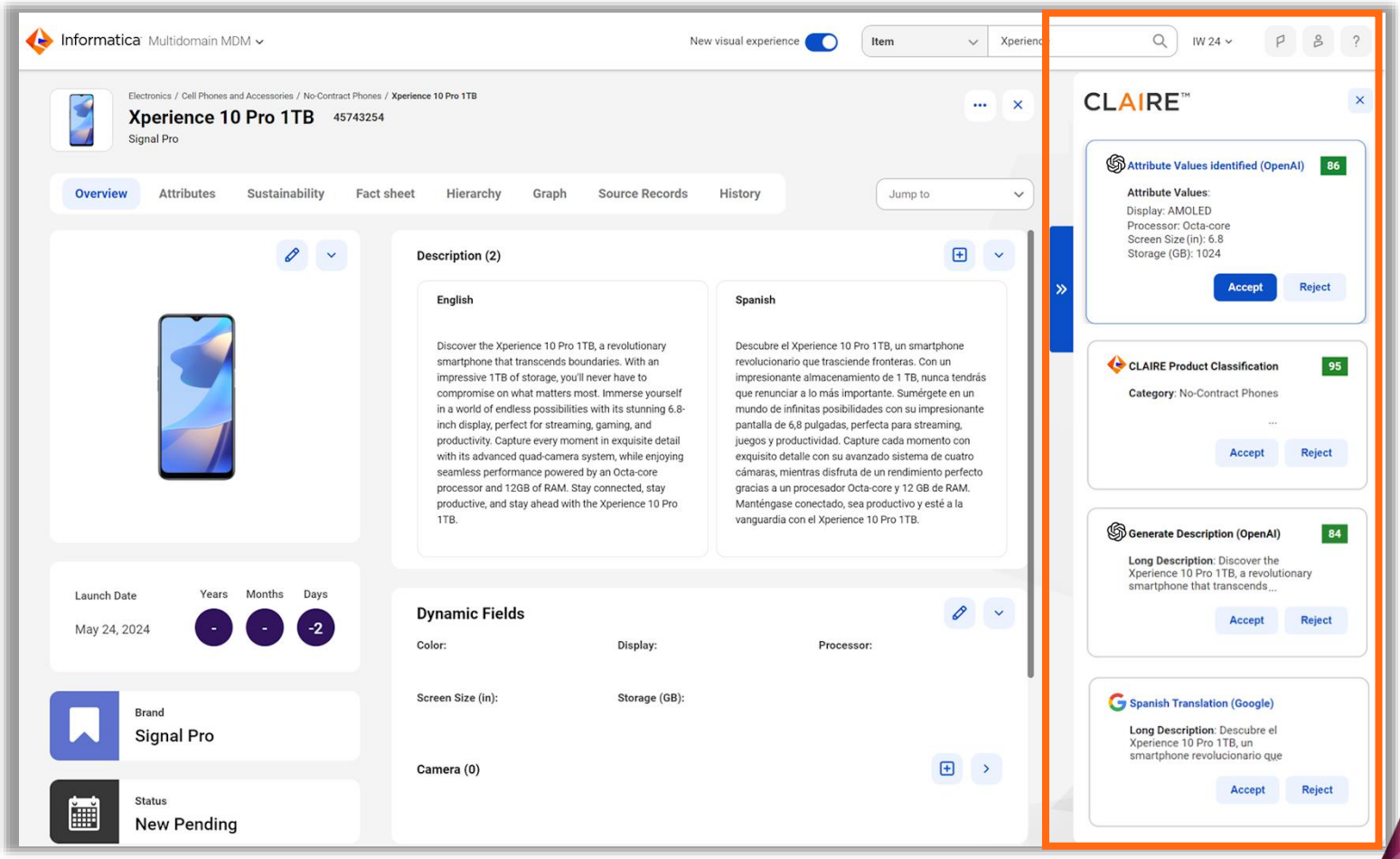
Before you configure data enrichment, ensure that you understand the features applicable to data enrichment.

- ❑ You can enrich a record after the record is created or updated in the business applications or through the public REST APIs.
- ❑ You can enrich one record at a time. You can't enrich records in bulk. Data enrichment isn't triggered after you ingress or import records.
- ❑ You can enrich the attributes of a business entity for which you configure data enrichment. You can't trigger enrichment on the attributes of one business entity and enrich the attributes of another with the same rule association.
- ❑ You can create only one rule association within an objective.
- ❑ When you map input fields, you can map the attributes of a business entity to the data provider input fields. You can't map the relationship nodes of a hierarchy model to the data provider input fields.
- ❑ You can't map dynamic fields and business entity record fields when you configure rule associations for data enrichment. You can't enrich dynamic fields and business entity record fields.
- ❑ You can't delete or disable objective groups that you create in Business 360 Console. However, you can disable objectives in an objective group.

Third-Party Enrichments

Custom Enrichments via External Data Providers

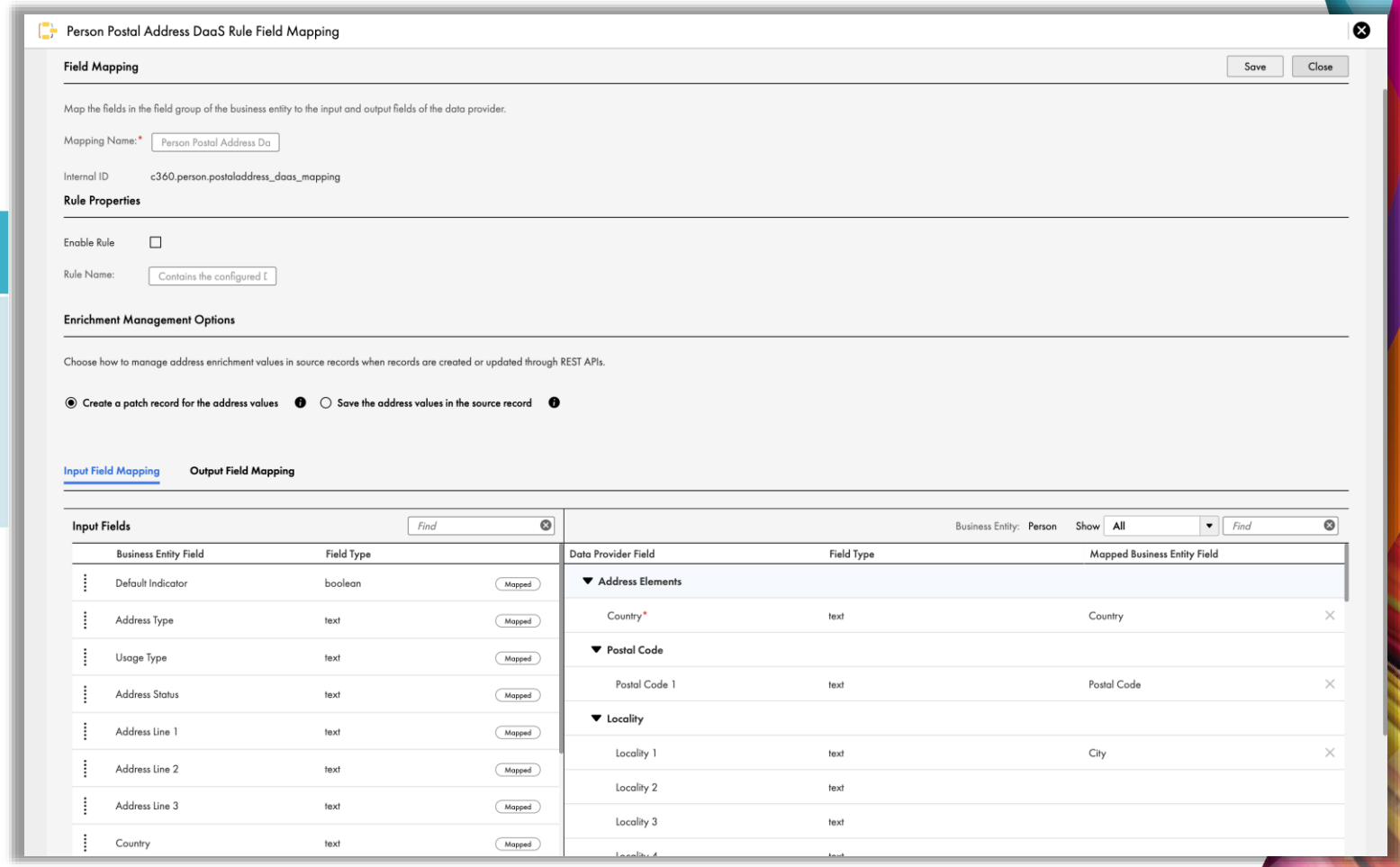
- Real-time third-party enrichments of master data via CAI
- Enrich business entities and hierarchy relationships using recommendations



Realtime AV

DaaS Real-Time Address Verification for Custom Field Groups

- Validate and enrich addresses in custom field groups in real time using Informatica Address Verification



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