

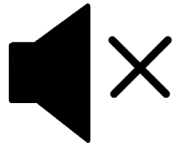
Oct 17, 2023

C360 SaaS – Operationalize Your Master Data Platform

- Kamal Abrol, Principal Architect, CSA

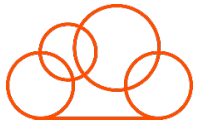


Housekeeping Tips



- 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 also 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.

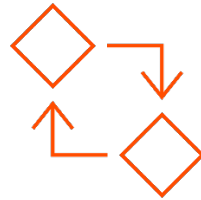
Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
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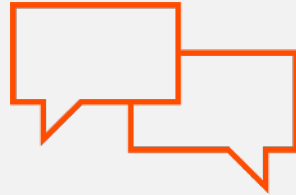
Tailored training and
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recommendations

More Information



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<https://success.informatica.com>



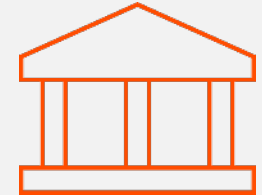
Communities & Support

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Documentation

<https://docs.informatica.com>



University

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Agenda

Business events use case

Business Events Modeling

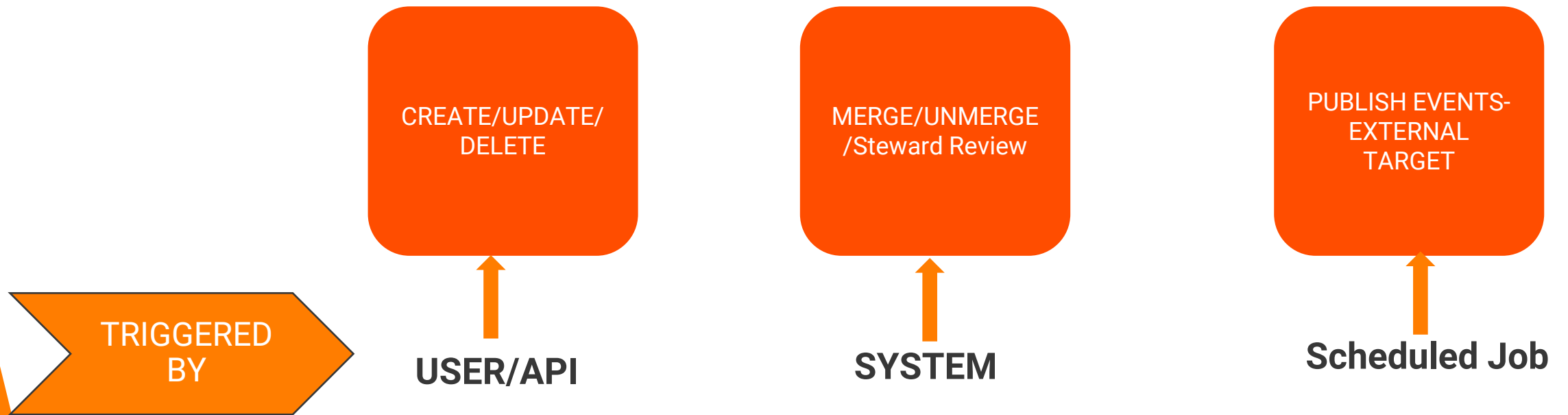
ICEBERG Engine

Operationalize MDM SaaS

Demo- CREATE+UPDATE+PUBLISH

Event Processing for Merge and Unmerge

Business events use case-MDM SaaS Journey

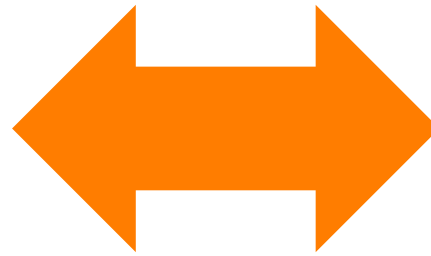


Business Events Modeling

Business Events (examples)

- Simple events
 - Create, update, delete, merge/unmerge
- Complex events
 - Bulk load
 - DQ threshold per load
 - Updates in a day

SENSE



Business Actions (examples)

- Workflows
- Load data to S3
- Stream events to Kafka
- Call APIs

ACT



Simple cause and effect

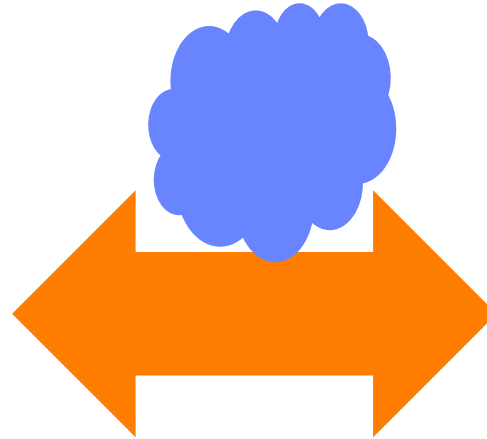
Business Events Modeling VISION..

Include 'Reason'

Business Events (examples)

- Simple events
 - Create, update, delete, merge/unmerge
- Complex events
 - Bulk load
 - DQ threshold per load
 - Updates in a day

Business Intelligence



Business Actions (examples)

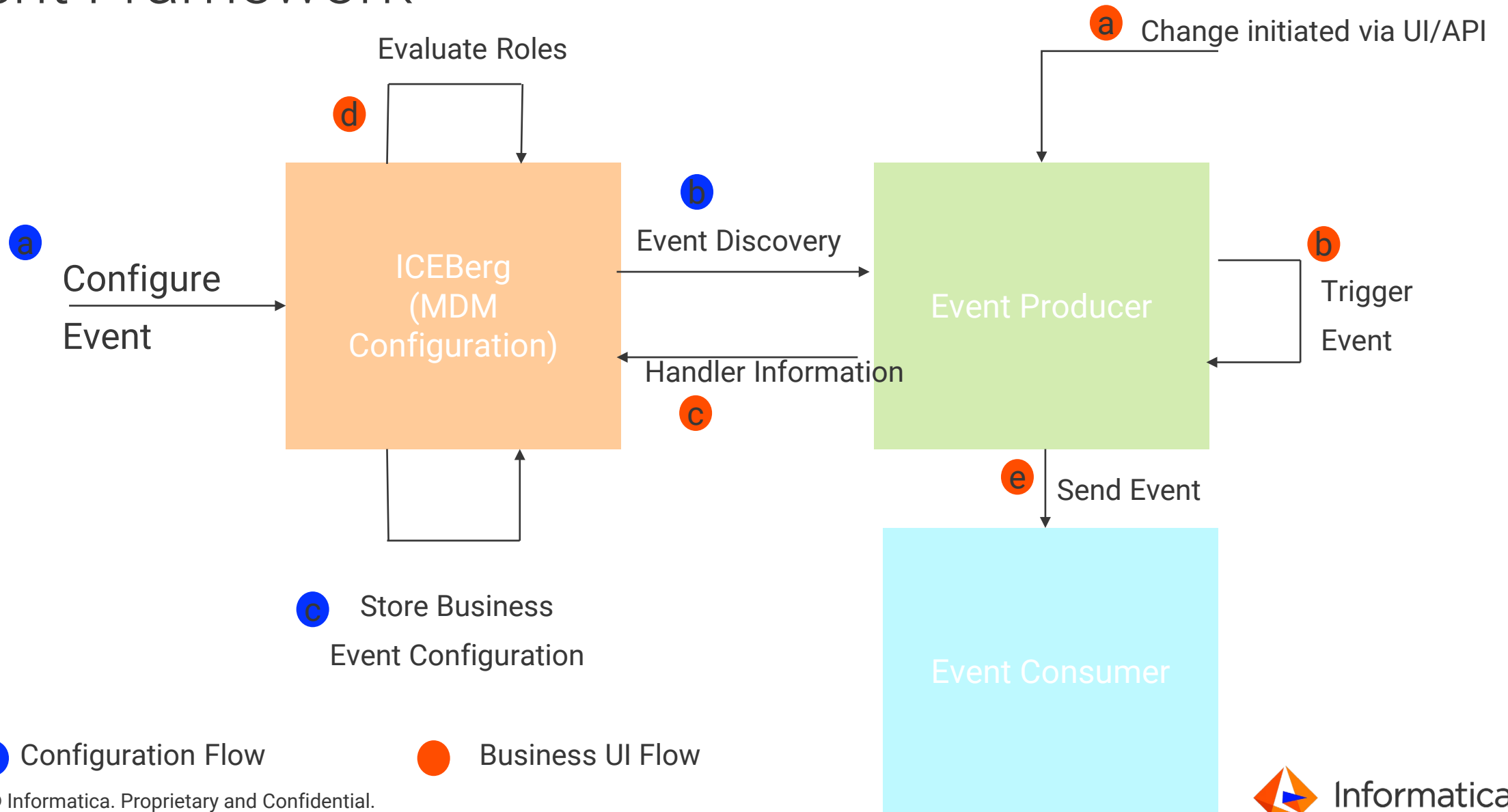
- Workflows
- Load data to S3
- Stream events to Kafka
- Call APIs

SENSE

REASON

ACT

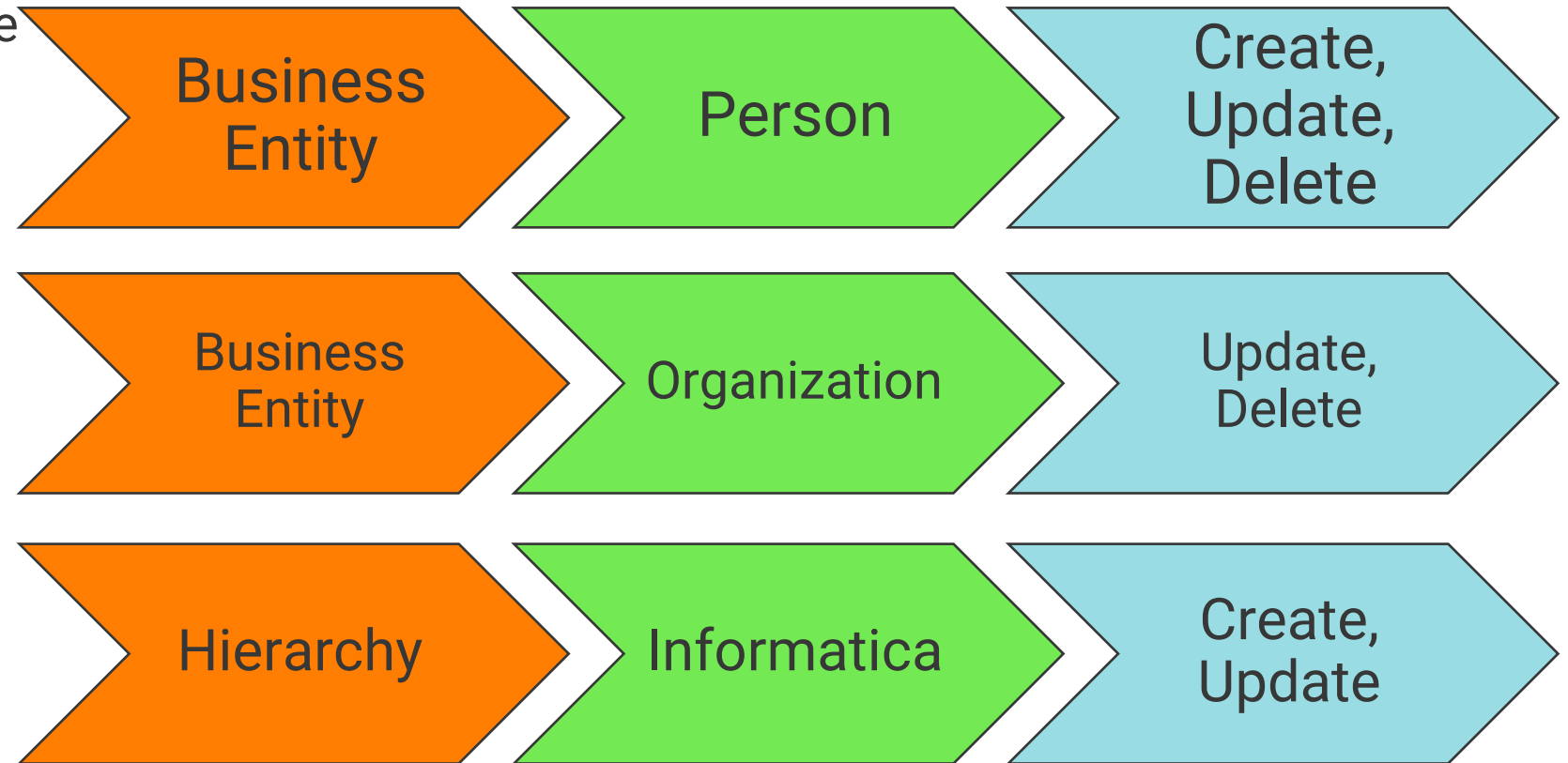
Event Framework



Functional Overview

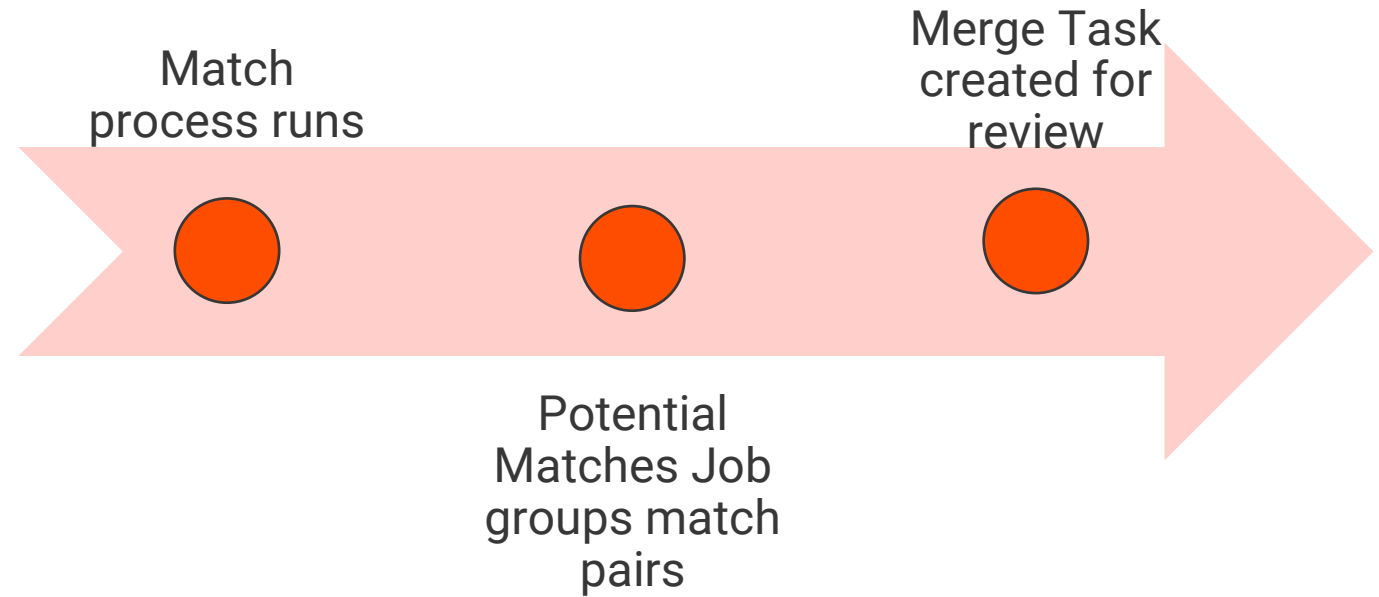
Per Asset Event Configuration

- Event configuration can be initiated per Asset.
- One or more action triggers can be set up
- Layout specific to CRUD Operation

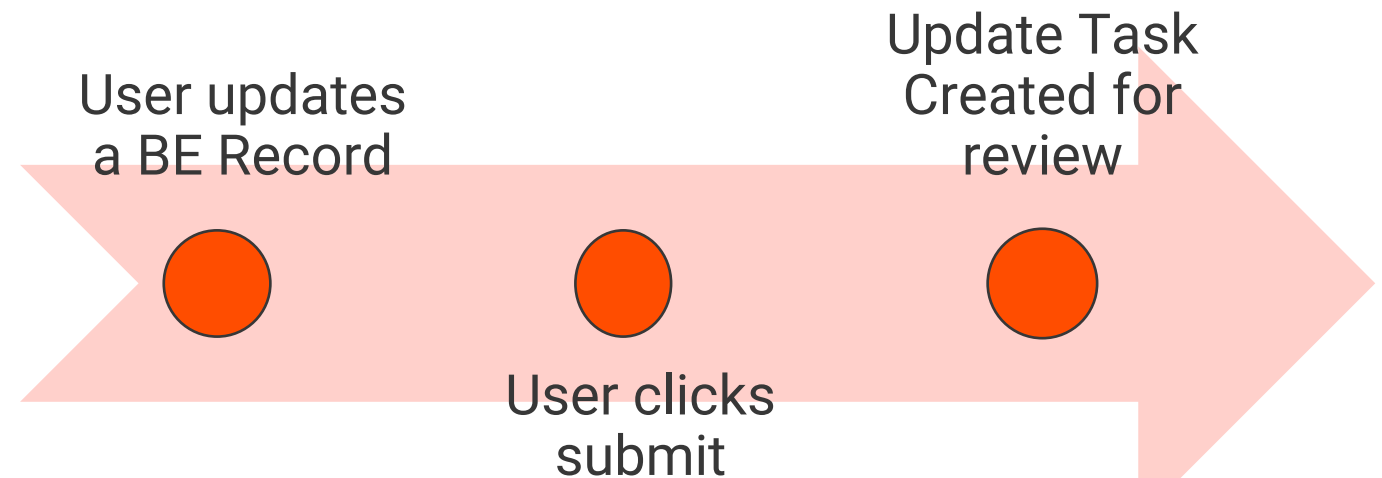


System Triggered vs User Triggered

- System Generated Events are those triggered by the system. For instance a scheduled job that process match pairs and flags matches for manual review will generate a system event



- User Triggered events are those triggered by changes a user makes via the Business UI. Examples of these include : creates and updates to a Business Entity record, changes to Hierarchies and an Unmerge Operation via the XREF screen.



System vs User

The image displays two side-by-side screenshots of the 'New Event' configuration interface. Both screenshots show a progress bar at the top with three steps: 1. Event, 2. Workflow Tasks, and 3. Workflow Properties. The left screenshot is for a 'System-Generated Event'. Under 'Event Details', the 'Event Type' is set to 'System-Generated Event'. There are input fields for 'Display Name' and 'Internal ID'. Below this is an 'Event Scenarios' section with a table header containing 'Asset Name*', 'Asset Type*', and 'Actions*'. The table is empty, and a message below it says 'There are no event scenarios. To add an event Scenario, click Add Event Scenario.' The right screenshot is for a 'User-Triggered Event'. Under 'Event Details', the 'Event Type' is set to 'User-Triggered Event'. It has input fields for 'Display Name' and 'Internal ID'. The 'Workflow Trigger' section has three radio buttons: 'Required' (selected), 'Optional', and 'Not Required'. Below that is a dropdown menu for 'Affected User Roles'. The 'Event Scenarios' section is identical to the left screenshot, with an empty table and a message to add scenarios.

Workflow Trigger and Roles are configured for User Events but not for system Events

Support for Out of Box workflows

- Out of box workflows are provided so that the implementor does not have to configure their own workflows in CAI
- Currently one step approval workflows are provided and more will be added in the future

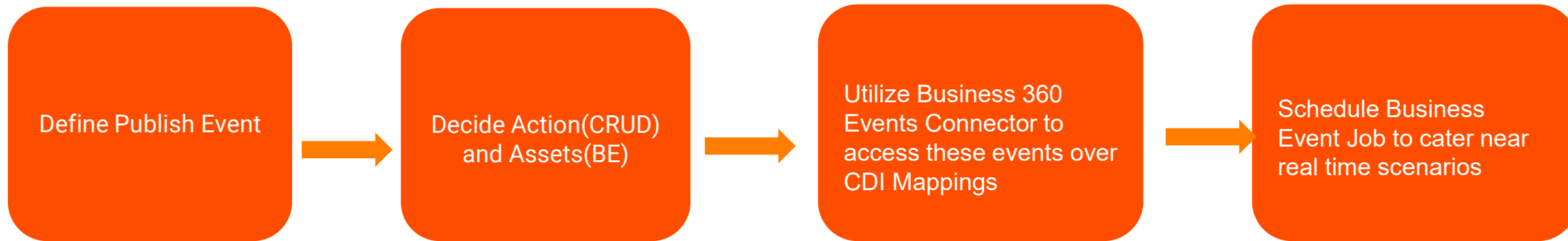


DEMO- USER EVENTS

CREATE/UPDATE SCENARIO

Operationalize MDM SaaS

Operationalize MDM SaaS Via Publishing event Processing



Publish to External Targets

Example

- Workflows
- Load data to S3
- Stream events to Kafka
- Call APIs

Configuration steps

- Add Business 360 Event Connector to agent group
- Create A publishing event in Business 360
- In Data Integration Create a Mapping , Mapping task and Taskflow
- Check that MDM Business Events has been Published
- Create a Business Event Job

Define Event, Target Connection

The screenshot shows the 'Event Details' configuration page in the Informatica Business 360 Console. The event type is set to 'Publishing Event'. The display name is 'BE_Update', the internal ID is 'be_update', and it expires in 6 days. A large orange text overlay reads 'STEP 1 : Define a Publish event'.

STEP 1 : Define a Publish event

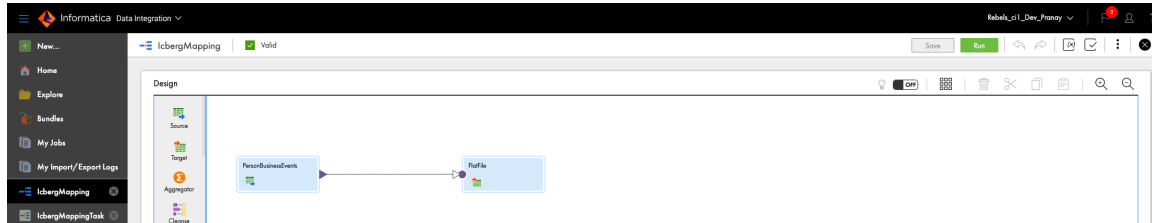
- Event type – publish, choose assets

The screenshot shows the 'AmazonS3Connection' configuration page in the Informatica Administrator. The connection name is 'AmazonS3Connection'. The type is 'Amazon S3 v2'. The runtime environment is 'INWPF28BDIH-AAD'. The connection section includes fields for Access Key, Secret Key, IAM Role ARN, External Id, Use EC2 Role to Assume Role, Folder Path, Master Symmetric Key, Customer Master Key ID, S3 Account Type, Region Name, Federated SSO IdP, and Other Authentication Type.

STEP 2 : Define a Connection

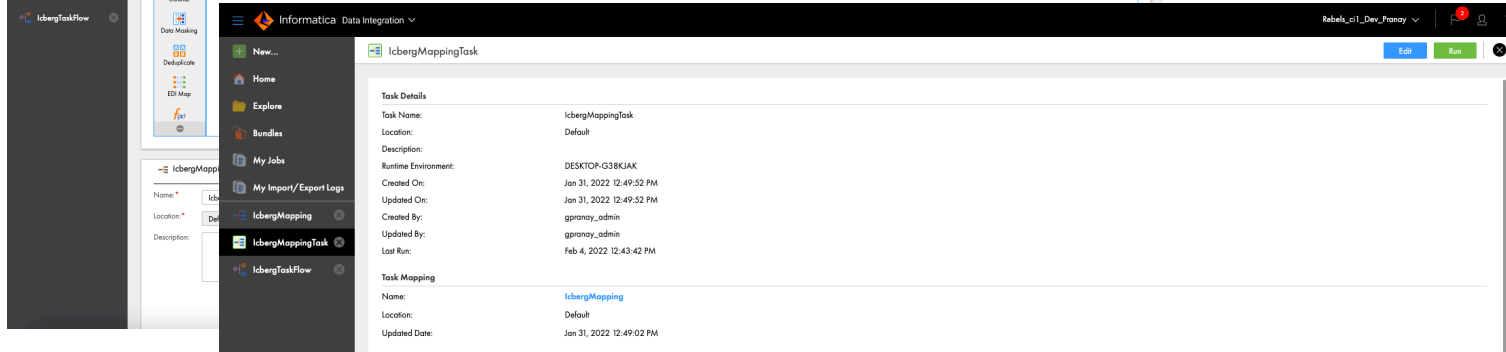
- Business 360 Events Connector as a source

Leverages the Capabilities of DI



STEP 2 : Define a Mapping

- Business 360 Events Connector as a source

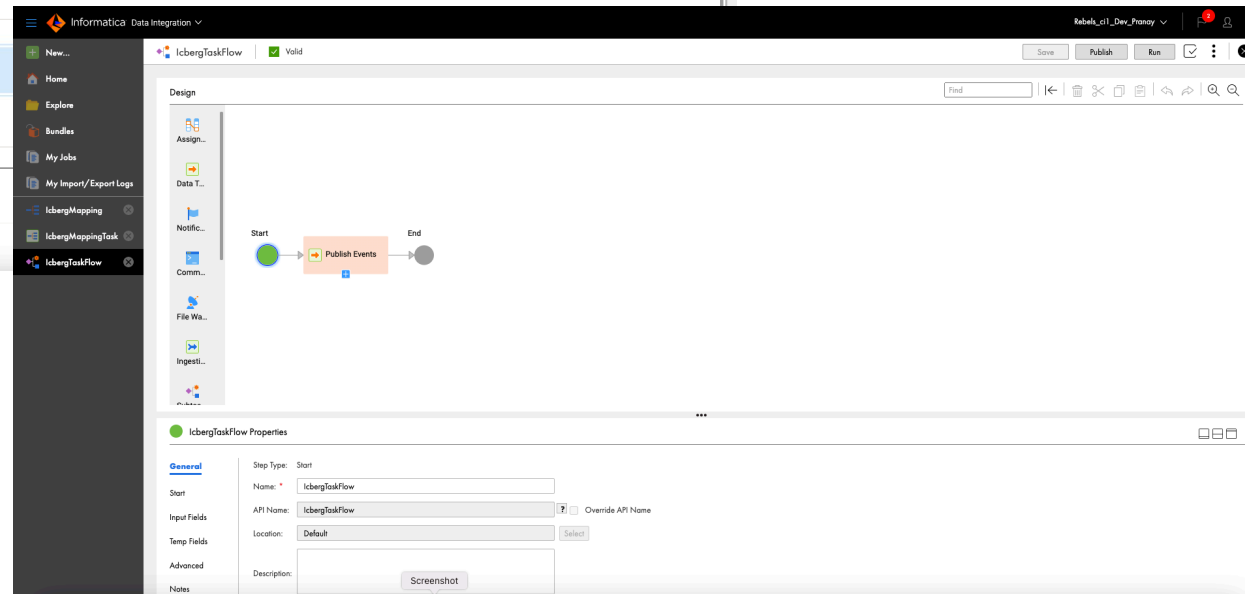
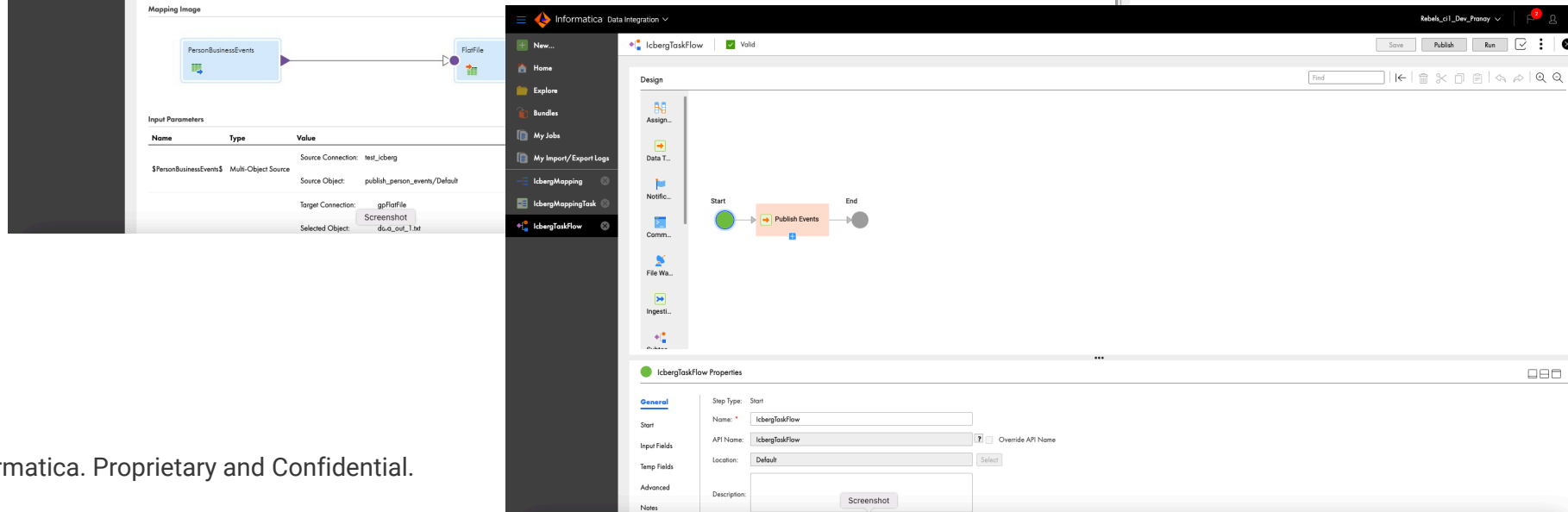


STEP 3 : Mapping Task

- Use Mapping specified in step 1

STEP 4 : DI Task Flow

- Add Mapping Task to taskflow
- Your DI Logic



Schedule the event

Informatica Business 360 Console

Process: Publish Business Events

Description: Publishes business events to a target system.

Publish Type: Standard publish Custom publish

02/28/2022 6:26:00 AM 03/08/2022 6:26:00 AM

| Taskflows | |
|----------------------------------|-----------|
| Name | Location |
| PublishOrgDataToAmazonS3Taskflow | //Default |

| Business Events | |
|---------------------|----------------|
| Name | Type |
| TestPublishEventOrg | Business Event |

Save Run

Screenshot

STEP 5 : Run Publish Job

- Run a job to publish the event to DI

DEMO- PUBLISH EVENT

Event Processing for Merge and Unmerge

Merge Potential Matches-Workflow

The screenshot shows the Informatica Customer 360 interface. The top navigation bar includes the Informatica logo, 'Customer 360', a search bar with 'Person' and a star icon, and user controls like 'savereloadsav', a flag icon, a user profile icon, and a help icon. The left sidebar contains navigation options: New, Home, Search, File Import, Workflow Inbox, and Hierarchies. The main content area is titled 'Search > Search For *' and 'Person'. It features a 'Filters' section on the left and 'Search Results: * (10)' on the right. The filters are categorized by 'Address: City' and 'Address: Country'. The search results list several individuals with their respective city, state, and country information. Two entries, 'KELLY WILLS' and 'CHARLES WILLS', are highlighted in yellow.

Filters

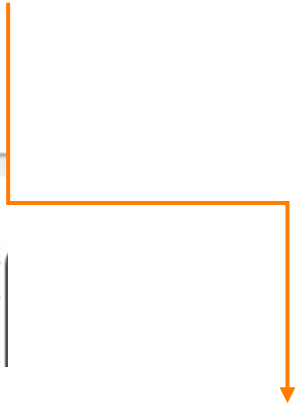
- Address: City**
 - All (5)
 - Atlanta (1)
 - Bangalore (1)
 - Georgia (1)
 - Mumbai (1)
 - Redwood City (1)
- Address: Country**
 - All (5)
 - India (2)
 - United States (3)

Search Results: * (10)

| | | | |
|--------------------|--------------------|--------------------|------------------------|
| ▶ Sachin Tendulkar | City: Mumbai | State: Maharashtra | Country: India |
| ▶ Rahul David | City: Bangalore | State: Karnataka | Country: India |
| ▶ Amar Anthony | City: Redwood City | State: Alaska | Country: United States |
| ▶ KELLY WILLS | City: Georgia | State: Alaska | Country: United States |
| ▶ CHARLES WILLS | City: Atlanta | State: Alaska | Country: United States |

Manual Review-Workflow

The screenshot shows the Informatica Business 360 Console interface. The top navigation bar includes the Informatica logo, 'Business 360 Console', and a 'save reload save' dropdown. The left sidebar contains navigation options: New..., Home, Explore, Business Events, My Jobs, Global Settings, Reporting Structure, Personpotentialmatch, and 'schedule job for merge tasks'. The main content area is titled 'schedule job for merge tasks' and features a 'Process' dropdown set to 'Generate Merge Tasks', a 'Description' field with the text 'Groups potential matches and generates tasks for groups that require a review.', and a 'Task Limit' input field set to '25'. Below this, an 'Assets' table is displayed with the text 'Generate Merge Task Job' overlaid in orange. The table has columns for 'Name' and 'Type' and contains one row: 'Person' with 'Business Entity' as the type.



The screenshot shows the 'Workflow Inbox' section of the Informatica console. The left sidebar includes 'New', 'Home', 'Search', 'File Import', 'Workflow Inbox', and 'Hierarchies'. The main area is titled 'Workflow Inbox' and shows 'Quick Filters' and 'Open Tasks (1)'. A table lists the tasks:

| Task ID | Title | Task | Priority | Status | Owner | Creator |
|------------------|-----------------------|--------------|----------|------------|-------|-----------|
| 5239106986913... | Person Merge Approval | Final Review | Medium | Unassigned | | cdesigner |

Below the table, there is a 'Start' button and a breadcrumb trail: 'Final Review | Person Merge Approval'. At the bottom, there are fields for 'Task: Final Review', 'Assigned To:', and 'Due By:'.

Instantiate Merge Workflow Task

Merge Task – Cross Reference View

Informatica Customer 360 Person * savereloadsave

523910698691362816 | Person Merge Approval Stop Release Approve

Task Summary

Matching Records

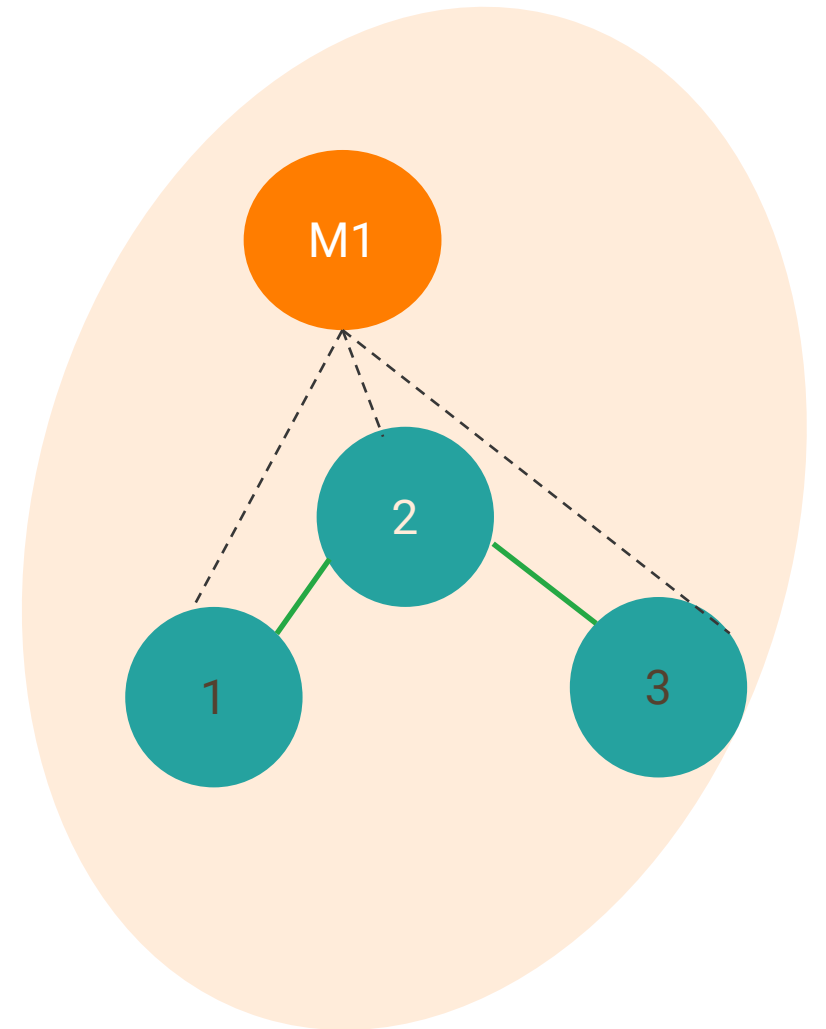
| | CHARLES WILLS (Merged R... | CHARLES WILLS | >> | KELLY WILLS | Source System: Informatica Customer 360 |
|---------------|-----------------------------|---------------|----|--------------|---|
| System Fields | | | | | |
| First Name | : CHARLES | CHARLES | | KELLY | <input checked="" type="checkbox"/> Match |
| Middle Name | : | | | | <input type="checkbox"/> Not a match |
| Last Name | : WILLS | WILLS | | WILLS | <input type="checkbox"/> Not Sure |
| Full Name | : CHARLES WILLS | CHARLES WILLS | | KELLY WILLS | |
| Prefix Name | : Mr. | Mr. | | Mr. | |
| Suffix Name | : Sr. | Sr. | | Sr. | |
| Title | : SportsPerson | SportsPerson | | SportsPerson | |

Unmerge

360 View Record Details Relationships Hierarchies Matches History Tasks **Source Records** 16

Source Records 1 Record Selected for Unmerging Find Unmerge

| Bobby P Newport | <input type="checkbox"/> Bobby Newport Source: Salesforce | <input type="checkbox"/> Bobby C. Newport Source: SAP | <input type="checkbox"/> Bob Newport Source: Salesforce |
|---|--|--|--|
| System Fields: <i>Last Update: 03/15/16</i> | | | ↑ |
| Display Name: Bobby P Newport | Bobby P. Newport | Bob C. Newport | Bob Newport |
| First Name: Bobby | Bobby | Bob | Bob |
| Middle Name: P | P. | C. | 3 |
| Last Name: Newport | Newport | Newport | 3 |
| Credentials: MBBS | MBBS | MBBS | M |
| Gender: Male | Male | Male | Male |
| Date of Birth: October 20th 1970 | Sep, 20th 1970 | October 20th 1970 | March 20th 1975 |
| Place of Birth: Canada | Canada | Germany | United States |
| LinkedIn URL: .../in/Bobby.Newport | .../in/Bobby.Newport | .../in/Bob.Newport | .../in/Bob.Newport |
| KOL Indicator: 55 | 55 | 44 | 44 |
| Target Indicator: 222 | 222 | 222 | 222 |
| Status: Active | Active | Inactive | Inactive |



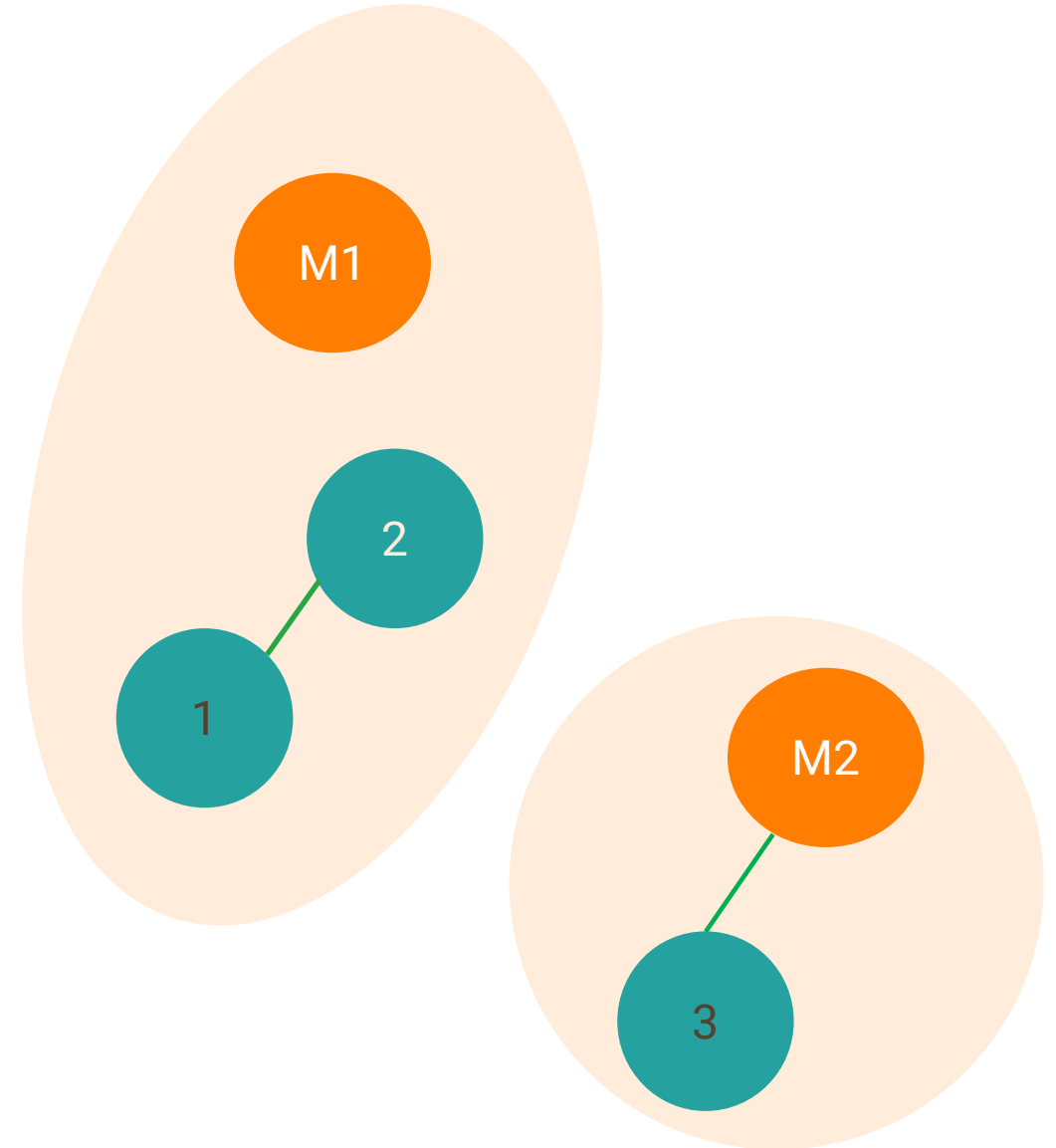
Unmerge Approval

On approval, disconnect unmerged XREF from original master and group it into its own virtual master

360 View Record Details Relationships Hierarchies Matches History Tasks **Source Records**

Source Records Find Unmerge

| Bobby P Newport | <input type="checkbox"/> Bobby Newport Source: Salesforce | <input type="checkbox"/> Bobby C. Newport Source: SAP | <input checked="" type="checkbox"/> Bob Newport Source: Salesforce |
|---|---|---|--|
| System Fields: Last Update: 03/15/16 | | | |
| Display Name: Bobby P. Newport | Bobby P. Newport | Bob C. Newport | 222 Bob Newport |
| First Name: Bobby | Bobby | Bob | Bob |
| Middle Name: P. | P. | C. | - |
| Last Name: Newport | Newport | Newport | Newport |
| Credentials: MBBS | MBBS | MBBS | MBBS |
| Gender: Male | Male | Male | Male |
| Date of Birth: October 20th 1970 | Sep, 20th 1970 | October 20th 1970 | March 20th 1975 |
| Place of Birth: Canada | Canada | Germany | United States |
| LinkedIn URL: .../in/Bobby.Newport | .../in/Bobby.Newport | .../in/Bob.Newport | .../in/Bob.Newport |
| KOL Indicator: 55 | 55 | 44 | 44 |
| Target Indicator: 222 | 222 | 222 | 222 |
| Status: Active | Active | Inactive | Inactive |



Business Event Conclude

- **Task Specific Events**
 - Business Entity + Hierarchy Create, Update, Delete Task -> Approve/Rej
 - Merge Task -> Merge action- Process Potential Matches
 - Unmerge

Task Manager

Quick Filters | Open Tasks (32) ↻ ↕

| Task ID | Title | Task | Priority | Status | Owner | Creator |
|--------------------|---|--------------|----------|------------|-------|---------|
| 508712497088303104 | Person updated | Final Review | Medium | Unassigned | | serge7 |
| 508290518371799040 | potential matches | Final Review | Medium | Unassigned | | olena |
| 507938559303356416 | Review 2 potential matches for organization | Final Review | Medium | Unassigned | | serge |
| 507938559303356417 | Review 1 potential matches for organization | Final Review | Medium | Unassigned | | serge |

1 - 5 of 32 < 1 of 7 > Items Per Page: 5

[↑](#) Final Review | Person updated Start

Task: Final Review
Status: Unassigned
Priority: ↑ Medium

Assigned To:
Created By: serge7
Modified By:

Due By:
Created On: Nov 4, 2020
Modified On: Nov 4, 2020

Description

- **Publish Events to External targets- Via CDI**

Questions?



Speaker: KAMAL ABROL



• Customer Success Technologist

Thank You!

References

- <https://infawiki.informatica.com/pages/viewpage.action?pageId=312083459>