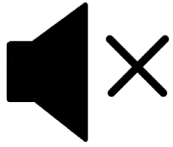


Mar 28th, 2023

C360 Data Model, Match-Merge and Hierarchy in MDM SaaS

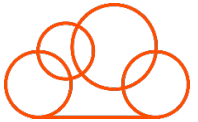
- Sourya Dass, Senior Solutions Architect

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 **INFASupport YouTube channel** and **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.

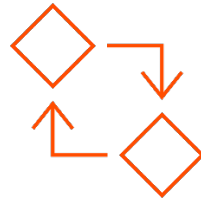
Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions

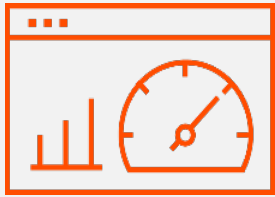


Informatica
Concierge



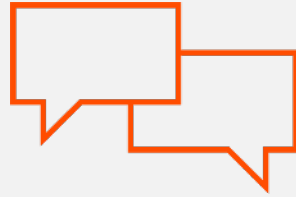
Tailored training and
content
recommendations

More Information



Success Portal

<https://success.informatica.com>



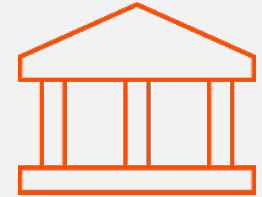
Communities & Support

<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.

MDM SaaS Data Model, Matching & Hierarchy

Sourya Dass, Senior Solutions Architect
Customer Success



Model any & all master data

Metadata driven

AI & ML guided

Configuration without coding

Continuous Innovation

Scalable microservices architecture



Out of the box Customer model



Easy to extend in new modeling canvas



Ref360 code lists for lookups from C360 model



Smart Fields: context aware data types

All Attributes

Basic Fields

- Text
- Integer
- Double
- Decimal
- Boolean

Properties: Address

General

Display Name: * Address

Survivorship

Internal ID: * PostalAddress

Description: Defines all the fields in a standardized, global address. When you want to support more than one address in a record, select

Allow multiple values: Allow multiple values



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Out of the box Customer model



Easy to extend in new modeling canvas

Document Model

```
{
  _id: "4d0ad975bb30"
  sName: "Karl"
  fName: "Meier"
  bankAccounts: [
    { accNo: 395382 },
    { accNo: 824432 }
  ],
  addresses: [
    { city: "Berlin" },
    { city: "Leipzig" }
  ]
}
```



Ref360 code lists for lookups from C360 model



Smart Fields: context aware data types

Smart Fields

- Person Name
- Organization Name
- Address
- Date of Birth
- Social Security Number (SSN)
- eMail
- Image URL
- Phone
- Currency
- Social Media ID
- URL

Basic Fields

- Text
- Integer
- Decimal
- Double
- Boolean
- Field Group
- Date and Time
- Date
- Lookup Field

Customer 360 SaaS



Model any & all master data



Onboard Data 24x7x365

Metadata driven

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Continuous Innovation

Scalable microservices architecture



Use Cloud DI to write to MDM staging area



MDM generates DQ mappings to apply DQ rules automatically



MDM Connector



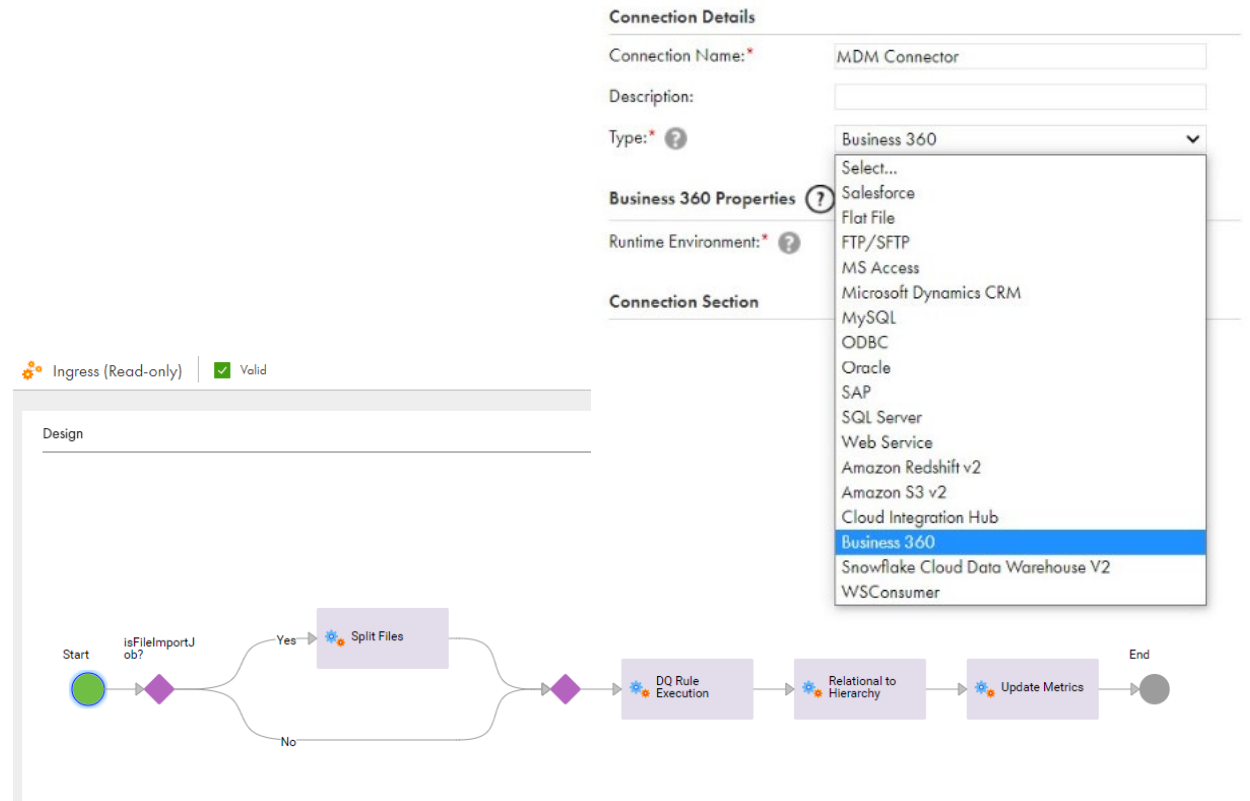
ML based file import (same as 10.4)



Manual data entry via Business UI



All data flows orchestrated by Cloud Application Integration



Customer 360 SaaS



Model any & all master data



Onboard Data 24x7x365



Verify, Standardize, enrich

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Bundled Cloud DQ – DQ rules and ref data



DQ Rules associated directly with MDM fields



Trust downgrades tied to DQ rule results



Phone and email verification

Full Name Concatenation

Definition Configuration

Design

PersonFullName

- firstName
- lastName
- middleName

Properties: PersonFullName

General	Rule logic definition			
Inputs	Input	Operator	Condition	
	if	firstName	is not	NULL then
	if	Result of # 1	is not	NULL then
	if	Result of # 2	is not	NULL then
	or	if	No rule statement is valid	then Do Nothing

Person Valid

Model Data Flow Consumption

Attributes Data Quality Match Survivorship Events

All Attributes

Basic Fields

- Text: First Name, Middle Name, Last Name, Full Name
- Integer: 123
- Double: 100
- Address, Status, Phone, Tax Details, Alternate Names, Email, Education, Identifier

Properties: Phone

General

Data Quality

Survivorship

Enable DaaS Validation

Validation Type: Batch, Real-time

Error Severity: Information

Error Message: Invalid Phone Number

Downgrade Trust Score (%): 100



Model any & all master data

Metadata driven



Onboard Data 24x7x365

AI & ML guided



Verify, Standardize, enrich

Configuration without coding



Match in any language, for any entity type

Continuous Innovation

Scalable microservices architecture



Identity Matching



Auto merge rules, manual merge rules or threshold-based rules

Edit Declarative Rule [Close]

Rule Properties and Thresholds | Match Fields

Rule Properties

Match Strategy: FUZZY
Rule Objective: Open
Match Purpose: Person_Name
Match Level: Typical
Rule Description: Similar name and same email

Thresholds

Not Match: 0 - 50 Maybe Match: 51 - 89
Auto Merge: 90 - 100

Changes made to 'Published' model cannot be saved [Save] [Cancel]

Customer 360 SaaS



Model any & all master data



Onboard Data 24x7x365



Verify, Standardize, enrich



Match in any language, for any entity type



Merge manage



Search, explore

Metadata driven

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Configuration without coding

Continuous Innovation

Scalable microservices architecture



Elastic Search



Search across multiple Business Entities at once



Save searches and save filtered searches as templates

Search New Filtered Search

Templates (2)

- Organization
 - Ontario Organizations
Attributes:
- Company Type Filter
Attributes:
Company Type - Value

Searches (1)

- Organization
 - Multinational Companies
Attributes:
Company Type - Value: Multinational
- Person

Search Results: John (2)

- John Thomas
Designation: Director, Product Management
Address: 120 Bremner Blvd, Toronto, ON, Canada

Multiple *
 Organization
 Person

Customer 360 SaaS



Model any & all master data

Metadata driven



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Merge manage

Continuous Innovation



Search, explore



Govern, Collaborate, Hierarchy

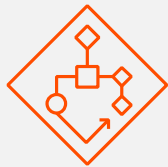
Scalable microservices architecture



Human tasks orchestrated by CAI

CLAIRE™

CLAIRE-powered smart file import (same as 10.4)



Structured hierarchy management



New Business Events framework

Person Update

Event Workflow Tasks Workflow Properties

Define the details of the event and the event scenarios that trigger the workflow.

Event Details

Event Type: User-Triggered Event

Display Name: Person Update

Internal ID: person_update_new

Workflow Trigger: Required Optional Not Required

Affected User Roles: Customer 360 Manager, Reference 360 Business Steward

Event Scenarios

Asset Name*	Asset Type*	Actions*
Person	Business Entity	Create

Jane Smith
123 ABC Street Spring Field, AA 12345
1 (210) 210-2100 | js@abc.com

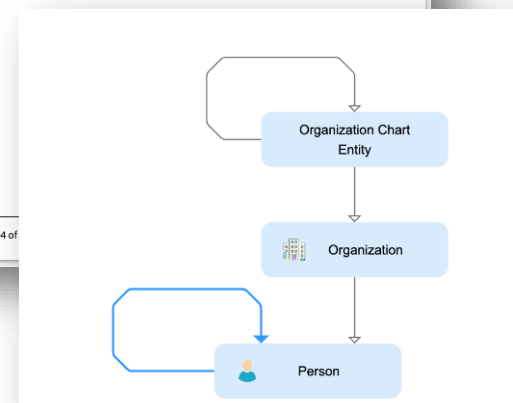
360 View Record Details Hierarchies Network History Matches Tasks Cross reference

Infa-Org (Org-Chart) Effective Date: 01/01/2016

	Title	Location
▼ Informatica		
▼ Sales		
▼ Jane Smith	VP	RWC
▼ Sambit Das	Dir.	BAN
▼ Antony Blake	Asst. Dir.	RWC
▼ Jake Brown	Dir.	RWC
▼ John Cook	Asst. Dir.	RWC
▼ Deborah Seth	Sr. Mgr.	TOR
▼ Micheal Turner	Sr. Mgr.	STU
▼ Marketing		
▼ Jane Smith	VP	RWC
▼ Sambit Das	Dir.	BAN
▼ Antony Blake	Asst. Dir.	RWC
▼ Jake Brown	Dir.	RWC
▼ John Cook	Asst. Dir.	RWC
▼ Deborah Seth	Sr. Mgr.	TOR
▼ Micheal Turner	Sr. Mgr.	STU

Child Records (4) Parent Records (3) Record Preview

Record	Relationship
Sambit Das	VP manages Dir.
Jake Brown	VP manages Dir.
Debroh Seth	VP manages Sr. Mngr.
Micheal Turner	VP Manages Sr. Mngr.



Customer 360 SaaS



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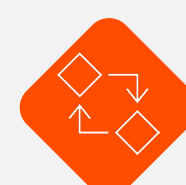
Continuous Innovation



Search, explore



Govern, Collaborate, Hierarchy



Orchestrate, Publish 24x7

Scalable microservices architecture



All data flows orchestrated by CAI



Extract data in batch with Data Integration & MDM Connector

The screenshot displays the Informatica Data Integration user interface. At the top, it shows the Informatica logo and the title 'Data Integration'. The main workspace is titled 'Organization-Read' and 'Valid'. Below this, there's a 'Design' view showing a data flow diagram with various components like 'Source', 'Target', and 'MDM'. The 'Properties' panel is open, showing the 'Field Mapping' configuration for the 'MDM' component. It includes a table for 'Response Structure' and 'Output Fields'.

Element Name	Cardinality	Field Name	Actions	Mapped Field
Organization	0-1	root		/root
name	0-1	PK_root	system generated	
numberOfEmployees	0-1	sourceSystem		/h/type/sourceSystem
companyType	0-1	sourcePKey		/h/type/sourcePKey
dateOfIncorporation	0-1	name		/h/type/Organization/name
stateOfIncorporation	0-1	numberOfEmployees		/h/type/Organization/numberOfEmployees
countryOfIncorporation	0-1	companyType		/h/type/Organization/companyType
imageUrl	0-1	dateOfIncorporation		/h/type/Organization/dateOfIncorporation

Customer 360 SaaS



Model any & all master data

Metadata driven



Onboard Data 24x7x365

AI & ML guided



Verify, Standardize, enrich



Match in any language, for any entity type

Configuration without coding



Merge manage

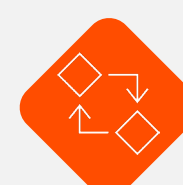
Continuous Innovation



Search, explore



Govern, Collaborate, Hierarchy



Orchestrate, Publish 24x7

Scalable microservices architecture



Secure



Roles, groups & users managed in IICS



Role-based access control



Industry certifications, standards & assessments

The screenshot shows the Informatica Administrator interface for user management. The left sidebar contains navigation options: Organization, Licenses, SAML Setup, Settings, Users, User Groups, User Roles, Runtime Environments, Connections, Add-On Connectors, and Schedules. The main content area is titled 'manager1' and includes sections for 'User Information' and 'Login Settings'.

User Information:

- First Name: new
- Last Name: new
- Job Title: ssa
- Phone Number: 1111111111
- Email: vtwani@informatica.com
- Description: oa

Login Settings:

- Authentication: Native
- User Name: manager1
- Max Login Attempts: 10
- Account Status: Active
- Force password reset on next login

Assigned User Groups and Roles:

Enabled	Role Name	Description
<input type="checkbox"/>	Admin	Role for performing administrative tasks for an organization...
<input type="checkbox"/>	Application Integration Business...	Role used for business managers
<input type="checkbox"/>	Application Integration Data Vie...	Role used for granting access for data
<input type="checkbox"/>	Application_Administrator	null
<input type="checkbox"/>	Business_Steward	null
<input type="checkbox"/>	Customer 360 Analyst	MDM Customer 360 Analyst
<input type="checkbox"/>	Customer 360 Data Steward	MDM Customer 360 Data Steward
<input checked="" type="checkbox"/>	Customer 360 Manager	MDM Customer 360 Manager
<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"/>	Developer	Role used by developer

User Roles Table:

Name	Last Updated	Status	Description
Admin	Jul 12, 2020, 11:28 PM	Enabled	Role for performing administrative tasks for an organization. Has full access to all licensed services.
Application_Administrator	Jul 15, 2020, 9:49 AM	Enabled	
Application Integration Business...	Jul 12, 2020, 11:20 PM	Enabled	Role used for business managers
Application Integration Data Vie...	Jul 12, 2020, 11:22 PM	Enabled	Role used for granting access for data
Business_Steward	Jul 15, 2020, 9:47 AM	Enabled	
Customer 360 Analyst	Jul 12, 2020, 11:27 PM	Enabled	MDM Customer 360 Analyst
Customer 360 Data Steward	Jul 12, 2020, 11:27 PM	Enabled	MDM Customer 360 Data Steward
Customer 360 Manager	Jul 12, 2020, 11:27 PM	Enabled	MDM Customer 360 Manager
Data Integration Data Previewer	Jul 12, 2020, 11:24 PM	Enabled	Role to preview data
Data Integration Task Executor	Jul 12, 2020, 11:28 PM	Enabled	Role to run Data Integration tasks
Developer	Jul 12, 2020, 11:26 PM	Enabled	Role used by developer
Designer	Jul 12, 2020, 11:28 PM	Enabled	Role for creating, testing, tools, and processes. Can configure connectors, schedules, and runtime
MDM Business User	Jul 12, 2020, 11:27 PM	Enabled	Role used for MDM C263 Business Application users.
Monitor	Jul 12, 2020, 11:28 PM	Enabled	Role used for application monitor
Operator	Jul 12, 2020, 11:28 PM	Enabled	Role used for monitoring executor environments.

Reference Architecture

SALES, SERVICE, MARKETING APPLICATIONS

B

APPLICATION LAYER

C

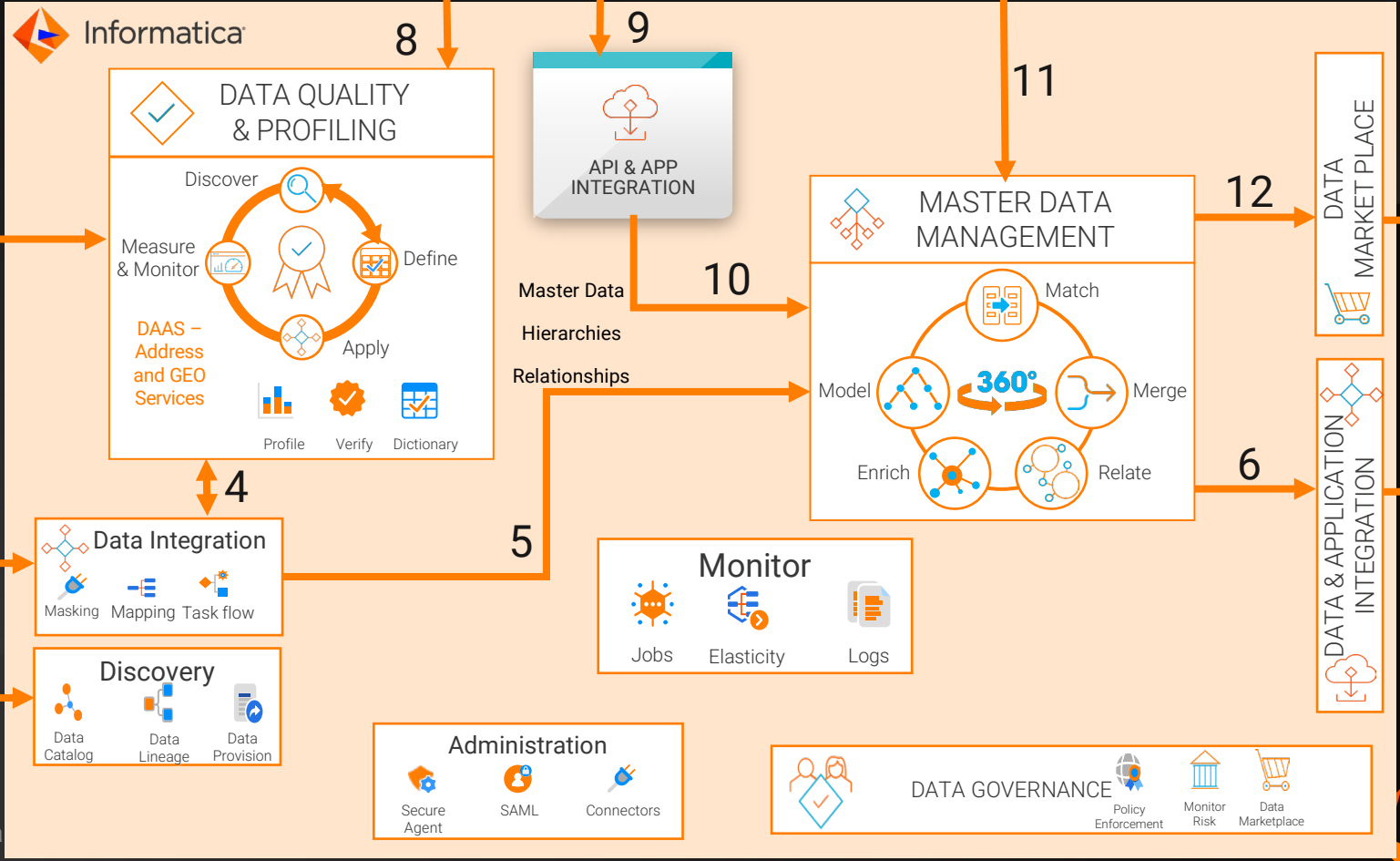
Event Hubs

Apps, Equipment, Cloud, Log files, Mobile, Machine Data

Application Servers, Mainframe, Databases

A

DATA LAYER



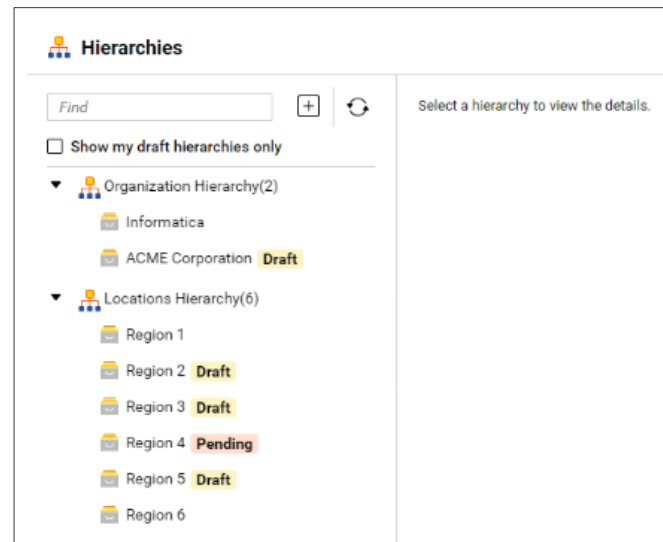
Sales Applications, Marketing Applications, Service Applications, Data Warehouse / Data Lake, Advanced Analytics, Data Science



Hierarchy Configuration

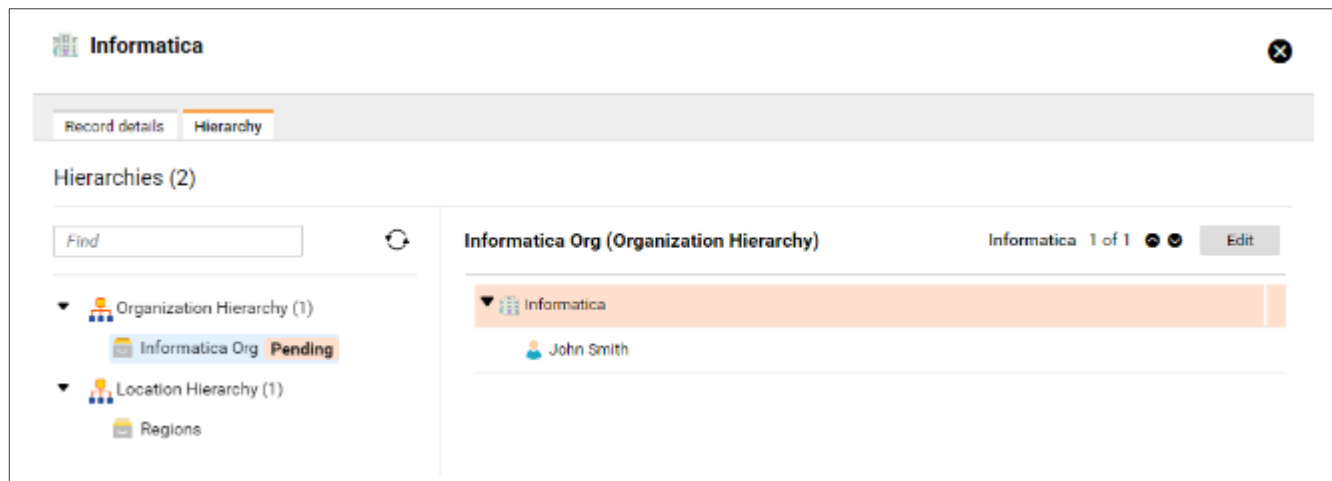
Hierarchy Model creation

- Hierarchies show how records are related to one another. A hierarchy contains multiple first-level nodes, child records, and relationships between the records.
- For example, in the Organization hierarchy, the Informatica record is the first-level node. The hierarchy contains the John Smith record and a relationship from the Informatica record to the John Smith record. The relationship shows that Informatica employs John Smith.
- The hierarchy relationships that you can create depend on your hierarchy model.
- Use the **Hierarchies** page to create, manage, and delete hierarchies. The page displays active, draft, and pending hierarchies and groups the hierarchies based on the hierarchy model.
- You can also filter to view your draft hierarchies only.
- The image shows a sample **Hierarchies** page.



Hierarchy Model creation

- Hierarchy tab
- Use the **Hierarchy** tab of a record to view the hierarchies a record belongs to. The page displays active, draft, and pending hierarchies and groups the hierarchies based on the hierarchy model.
- You can also view the child and parent records in the hierarchy.
- The following image shows the sample **Hierarchy** tab:



Hierarchy Model creation

- Creating a hierarchy
- Create a hierarchy and add first level nodes. Then, add child records to define parent-child relationships in the hierarchy. You can also define attribute values to provide more information about relationships.
- The hierarchy that you create is a draft. When you submit your draft, the hierarchy is published or sent for approval based on your configuration. If your changes trigger an approval workflow, a hierarchy task is created and available for review.
- To create a hierarchy, perform the following steps:
 1. Create a hierarchy.
 2. Add first-level nodes.
 3. Add and manage child records.
 4. Define relationship attribute values.

Moving Records

Moving records between hierarchies

You can move a record from one hierarchy to another by removing the record from the hierarchy and adding the record to the location you prefer within another hierarchy.

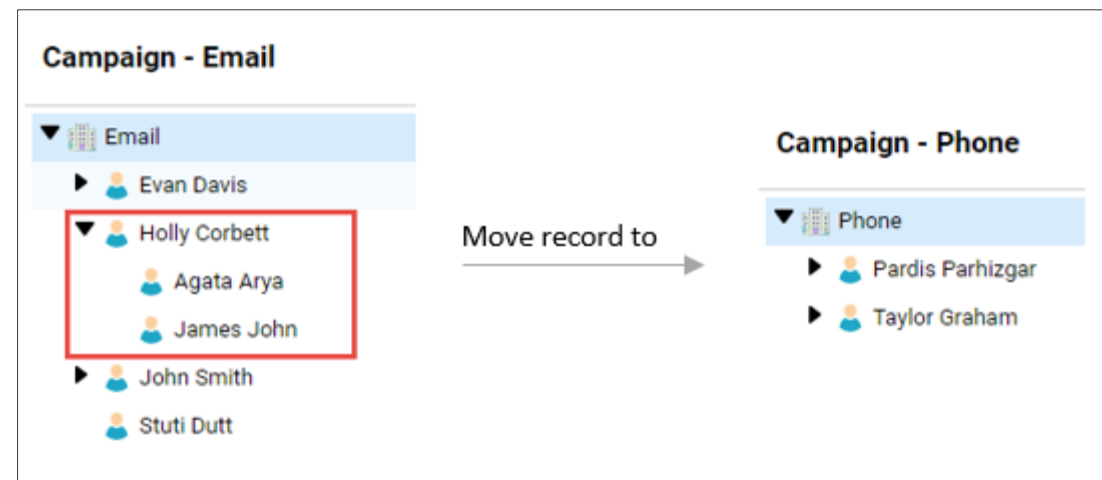
To move a record from one hierarchy to another, perform the following tasks:

1. Removing a record from hierarchy
2. Adding a record to hierarchy

Example: Moving records between hierarchies

To move a record from one hierarchy to another, remove the record from the hierarchy and add the record to the location you prefer within another hierarchy.

In this scenario you have two Campaign hierarchies Email and Phone. You want to move the Holly Corbett record from the Email hierarchy to the Phone hierarchy. The Holly Corbett record has child records Agata Arya and James John. You can move the record with or without its child records. The following image shows the Email and Phone hierarchies and highlights the Holly Corbett record that you want to move:

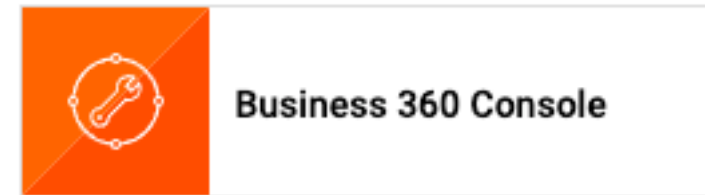


Moving Records

Move Action	Steps to Move a Record	Outcome
<p>Move the Holly Corbett record with its child records</p>	<ol style="list-style-type: none"> 1. Remove the record from the Email hierarchy. Ensure that you select Remove record only. 2. Add the record to the Phone hierarchy. 	<p>The Holly Corbett record is removed from the Email hierarchy, but the child record associations aren't removed from the record. After the move, Holly Corbett and its child records appear in the Phone hierarchy. The following image shows the Campaign hierarchies after the Holly Corbett record is moved:</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="1166 468 1472 714"> <p>Campaign - Email</p> <ul style="list-style-type: none"> ▼ Email <ul style="list-style-type: none"> ▶ Evan Davis ▶ John Smith Stuti Dutt </div> <div data-bbox="1498 468 1803 785"> <p>Campaign - Phone</p> <ul style="list-style-type: none"> ▼ Phone <ul style="list-style-type: none"> ▼ Holly Corbett <ul style="list-style-type: none"> Agata Arya James John ▶ Pardis Parhizgar ▶ Taylor Graham </div> </div>
<p>Move the Holly Corbett record without its child records</p>	<ol style="list-style-type: none"> 1. Remove the record from the Email hierarchy. Ensure that you select Remove record and all its child records and relationships. 2. Add the record to the Phone hierarchy. 	<p>The Holly Corbett record is removed from the Email hierarchy. Also, the child record associations are removed from the Holly Corbett record. After the move, Holly Corbett appears in the Phone hierarchy without its child records. The following image shows the Campaign hierarchies after the Holly Corbett record is moved:</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="1166 968 1472 1213"> <p>Campaign - Email</p> <ul style="list-style-type: none"> ▼ Email <ul style="list-style-type: none"> ▶ Evan Davis ▶ John Smith Stuti Dutt </div> <div data-bbox="1498 968 1803 1213"> <p>Campaign - Phone</p> <ul style="list-style-type: none"> ▼ Phone <ul style="list-style-type: none"> ▼ Holly Corbett ▶ Pardis Parhizgar ▶ Taylor Graham </div> </div>

Matching Configuration

Match Models

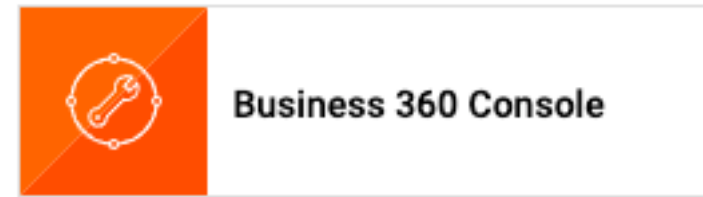


- Configuration located in Business 360 Console microservice
 - Explore > Person Business Entity > Match tab

The screenshot shows the Business 360 Console interface. On the left is a dark sidebar with navigation options: New..., Home, Explore, My Import/Export..., Business Events, My Jobs, Security, Global Settings, and Person (selected). The main area is titled "Person" and shows a "Valid" status. Below the title are tabs for "Model", "Data Flow", and "Consumption". Under "Consumption", there are sub-tabs for "Attributes", "Data Quality", "Match" (selected), "Survivorship", and "Events". The "Match" tab displays a table of "Match Models (5)".

Name	Version	Objective	Updated On	Status
Baseline Match Model for person Deduplication	1	Resolve Duplicates	Jan 28, 2021	Published
Test MP Match Rules Peson	1	Resolve Duplicates	May 18, 2021	Published
Test MP Match Rules Peson	2	Resolve Duplicates	May 18, 2021	Published
Test MP Match Rules Peson	3	Resolve Duplicates	Sep 15, 2021	Draft
Baseline Match Model for person Deduplication_copy	1	Resolve Duplicates	Oct 21, 2021	Draft

Declarative Rules



- Configuration located in Business 360 Console microservice

The screenshot shows the Business 360 Console interface. On the left is a dark sidebar with navigation options: New..., Home, Explore, My Import/Expo..., Business Events, My Jobs, Security, Global Settings, and Person (selected). The main content area is titled "Person > Baseline Match Model for person Deduplication_copy" and includes "Draft", "Publish", and "Model Configuration" buttons. Below this, there are tabs for "Machine Learning Model" and "Declarative Rules". The "Declarative Rules" tab shows a table with 5 rules. The table has columns for Rank, Merge Strategy, Match Strategy, Match Criterion, Match Level, and Description. The fourth rule is highlighted in blue.

Rank	Merge Strategy	Match Strategy	Match Criterion	Match Level	Description
1	Automated	FUZZY	Person_Name	Typical	Strongly similar name and exactly matching identifier
2	Automated	FUZZY	Resident	Typical	Strongly similar name, address and exactly matching birth date
3	Manual	EXACT	-	-	
-	Threshold-based	FUZZY	Person_Name	Typical	Similar name and same email
-	Threshold-based	FUZZY	Person_Name	Typical	Similar name and same phone number

Machine Learning



- Configuration located in Business 360 Console microservice

A screenshot of the Business 360 Console interface. The left sidebar shows navigation options: New..., Home, Explore, My Import/Export, Business Events, My Jobs, Security, Global Settings, and Organization. The main content area is titled "Organization > ORG_01" and shows a "Machine Learning Model" configuration page. A blue banner at the top indicates "Match training is in progress. You cannot edit the model configuration and the declarative rules." Below this, there are tabs for "Machine Learning Model" and "Declarative Rules". A "Start Labeling" button is visible, along with a message: "Select conclusive labels for 30 record pairs to complete batch 1". A table with five columns is shown: "Record Pairs Reviewed", "Record Pairs with Conclusive Labels", "Precision", "Recall", and "Accuracy". Below the table is an "Error Matrix" section with a message: "Nothing to display. The error matrix appears after the first batch of record pairs is labeled." The top right of the interface has "Draft", "Publish", and "Model Configuration" buttons.

Machine Learning

Run match job



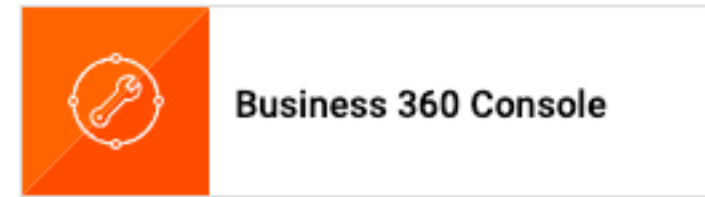
- Configuration located in Business 360 Console microservice
- - Start Training
 - My Jobs > Match Model name

The screenshot displays the Informatica Business 360 Console interface. The left sidebar shows navigation options like Home, Explore, My Import/Export, Business Events, My Jobs, Security, Global Settings, and Organization. The main content area shows a job run summary for 'ORG_01 (v2)' with a 'Success' status. Below this, the 'Job Run Time' section provides details: Start Time: Sep 10, 2021, 10:58:53 AM; End Time: Sep 10, 2021, 11:07:14 AM; Duration: 00 hours 08 mins 21 secs. A workflow diagram shows a sequence of steps: Start, Generate Tokens, Clean Up, Profile Data, Generate Candidates, Generate Seeds, Train And Prepare Batch, and End, all marked with green checkmarks. Below the diagram, a table provides job instance details.

Job Instance	Generate Tokens	Clean Up	Profile Data	Generate Candidates	Generate Seeds	Train And Prepare Batch
Overview	Instance ID	7a2466a4-7680-4a51-b8f5-a41f47581476				
Runtime Parameters	Job Type	Match - Start Training				
	Status	SUCCESS				
	Start Time	Sep 10, 2021, 10:58:53 AM				
	End Time	Sep 10, 2021, 11:07:14 AM				
	Duration	00 hours 08 mins 21 secs				

Machine Learning

Match Pairs Training



- Configuration located in Business 360 Console microservice
- Start Labeling

The screenshot displays the Informatica Business 360 Console interface. The left sidebar shows navigation options like Home, Explore, My Import/Export, Business Events, My Jobs, Security, Global Settings, and Organization. The main content area shows a job run summary for "ORG_01 (v2)" with a status of "Success".

Job Run Time

Start Time: Sep 10, 2021, 10:58:53 AM
End Time: Sep 10, 2021, 11:07:14 AM
Duration: 00 hours 08 mins 21 secs

c360.be.matchtraining.initMatchTraining

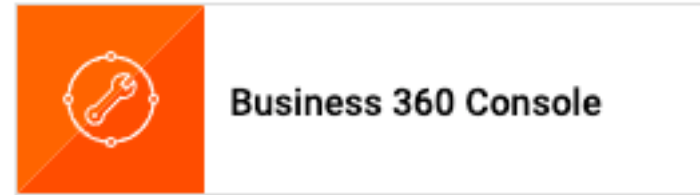
The job flow is visualized as a sequence of steps: Start (green checkmark) → Generate ... (green checkmark) → Clean Up (green checkmark) → Profile Data (green checkmark) → Generate ... (green checkmark) → Generate ... (green checkmark) → Train And ... (green checkmark) → End (green checkmark).

Job Instance

Job Instance	Generate Tokens	Clean Up	Profile Data	Generate Candidates	Generate Seeds	Train And Prepare Batch
Overview	Instance ID	7a2466a4-7680-4a51-b8f5-a41f47581476				
Runtime Parameters	Job Type	Match - Start Training				
	Status	SUCCESS				
	Start Time	Sep 10, 2021, 10:58:53 AM				
	End Time	Sep 10, 2021, 11:07:14 AM				
	Duration	00 hours 08 mins 21 secs				

Machine Learning

Match Pairs Training Cont'd



- Configuration located in Business 360 Console microservice
- Label Record Pairs

Label Record Pairs

Complete the match training process by labeling record pairs that are presented to you in batches.

Labeling for a batch is complete after you label 30 record pairs with the conclusive labels. You can choose to conclude the training at the end of any batch.

Review and label each record pair with one of the following labels:

<input type="button" value="Not a Match"/>	A conclusive label. Indicates that the records in the pair are different.
<input type="button" value="Not More Data"/>	An inconclusive label. Indicates that you need more data to make a decision.
<input type="button" value="Not Sure"/>	An inconclusive label. Indicates that you are not sure of your decision.
<input type="button" value="Match"/>	A conclusive label. Indicates that the records in the pair are the same.

Machine Learning

Match Pairs Training Cont'd



Business 360 Console

- Configuration located in Business 360 Console microservice
- Review each pair

Label Record Pairs

0/30
Conclusive Label Count in Batch 1 Overall Accuracy

Not a Match Need More Data Not Sure Match

Match Field	Record 1	Record 2
Address: Address Line 1	5245 W CENTINELA AVE	433 S HOBART BLVD APT 304
Address: City	LOS ANGELES	
Address: Address Line 2		
Address: Postal Code	90045	90020
Name	U.S. BANK NATIONAL ASSOCIATION	ACE NATIONAL PRECISION, INC.
Address: Postal Code Extension	2001	3625
Tax: Tax Number	48590	
Phone: Phone Number		

< Previous Next > Refresh Batch Close

Survivorship/Trust

Rank sources on attributes




- Configuration located in Business 360 Console microservice
 - Explore > Person Business Entity > Survivorship tab

The screenshot displays the Business 360 Console interface for configuring survivorship rules. The left sidebar shows navigation options like Home, Explore, and Person. The main area is titled "Person" and "Valid". The "Survivorship" tab is active, showing a list of fields with columns for "Fields", "Rule", and "Source Ranking". The "Full Name" field is selected, and its configuration is shown in a detail panel on the right. The detail panel includes a "Rule" dropdown set to "None" and a "Source Ranking" section with a "Change" button and a "Show" dropdown set to "All". Below this, a table lists source systems and their associated ranks.


Rank	Source System
--	Informatica Cust...
--	SFDC
--	Medicare
--	NPPES

Dynamic Cell Level Survivorship = Gold Records for Best Version of the Truth

Master/
Gold Records



First Name	Middle Name	Last Name	Date of Birth	Acxiom#	Address	City	State	Zip
Michael	William	D'Agostini	8/26/1950	308-03-8500	Elm & Carlton Streets	Buffalo	NY	14263-0001
Michael	William	D'Agostini	6/15/1978	005-10-4640	Elm & Carlton Streets	Buffalo	NY	14263-0001
Luis		Valdez	4/30/1953	917-13-8500	123 Main St.	Charleston	MA	02129-3533




Acxiom
3rd Party Data Service Provider

First Name	MI	Last Name	Acxiom#	Address	City	State	Zip
Michael	W	D'Agostini	308-03-8500	Elm and Carlton Streets	Buffalo	NY	14263
Michael	W	D'Agostini II	005-10-4640	Elm & Carlton Sts	Buffalo	NY	14263
Luis		Valdez	917-13-8500	123 Main St.	New York	NY	10016

Rules that:

- Cleanse
- Match
- Merge



DDA
Internal Direct Deposit Account System

Account #	First	Middle	Last Name	Date of Birth	Address	City	State	Zip
30803850041	Michael	William	D'Agostini	8/26/1950	161 Fort Washington Ave	New York	NY	10032-3713
00510464002	Michael	William	D'Agostini	6/15/1978	Apat 1B 13 Welwyn Rd	Great Neck	NY	11021-3533
91713850028	Luis		Valdez	4/30/1953	Apt 1-5A 13601 Perdido Key	Pensacola	FL	32507-9588

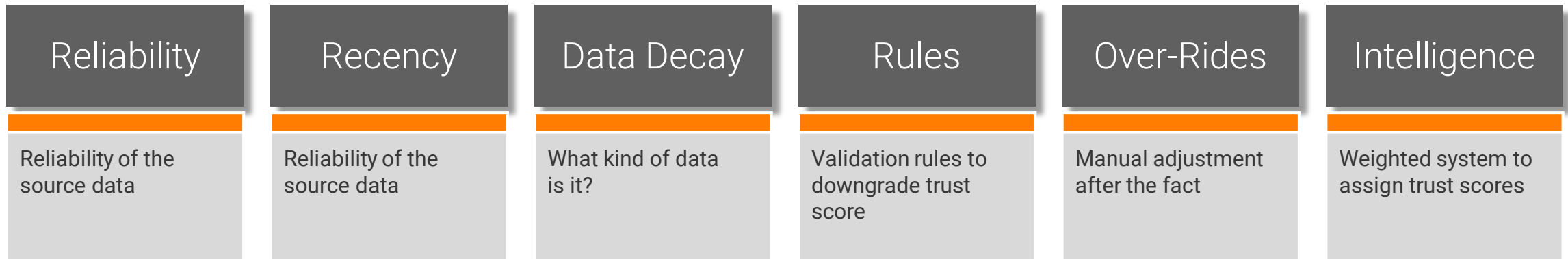


SFA
Internal Sales Force Automation System

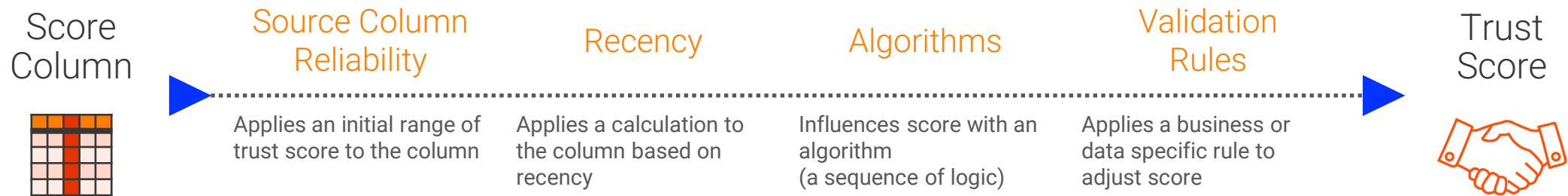
SFA_ID #	First	Last Name	Cust_ID#	Address	City	State	Zip
21399	Mick	D'Agostini	308-03-8500	Elm & Carlton Sts	Buffalo	NY	10032
50382	Michael	D'Agostini	005-10-4640	Elm & Carlton	Buffalo	NY	10032
62098	Louis	Valdes	917-13-8500	123 Main St	Boston	MA	

Trust Framework

Weighting system that assigns Trust Score to every source column



Informatica Trust Framework



Thank you

