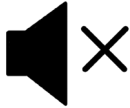


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# C360 SaaS – Enforce Governance on Master Data

- Kamal Abrol, Principal 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

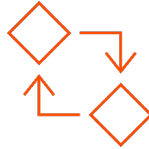
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Bootstrap trial and  
POC Customers



Enriched Customer  
Onboarding  
experience



Product Learning  
Paths and Weekly  
Expert Sessions



Informatica  
Concierge



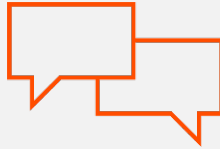
Tailored training and  
content  
recommendations

# 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.

# Disclaimer

- Governance Strategy will be based on the specific facts of an organization's business, operations and use of data.
- This presentation provides a set of discussion points that may be useful in the development of an organization's DG efforts
- An organization should consult with its governing counsel about what obligations they may or may not need to meet

# Agenda

**Data Governance What/Why/ Who/How?**

**With/Without Governance**

**Unleashing power of MDM with governance**

**Business Events Modeling**

**Enforcing Governance-Informatica MDM SaaS Solution**

**Event Processing for Merge and Unmerge**

**Demo**

# DATA GOVERNANCE-What/Why/Who/How?

- ❖ Who's accountable for the data in the “golden record”
- ❖ Who's responsible for enforcing business rules/policies
- ❖ How to track data
- ❖ Who maintains business glossary/Data Dictionary
- ❖ How to measure workflow KPI's
- ❖ How available and usable data is (are)
- ❖ Who manages conflicting data





- IT should not own DG program
- Business should be Key drivers of DG program while IT as participating member laying down MDM/DQ Frameworks.

IT Business Collaboration via  
MDM SaaS Business Events Workflows(ActiveVos)

# With/Without Governance

## ❖ Without Governance

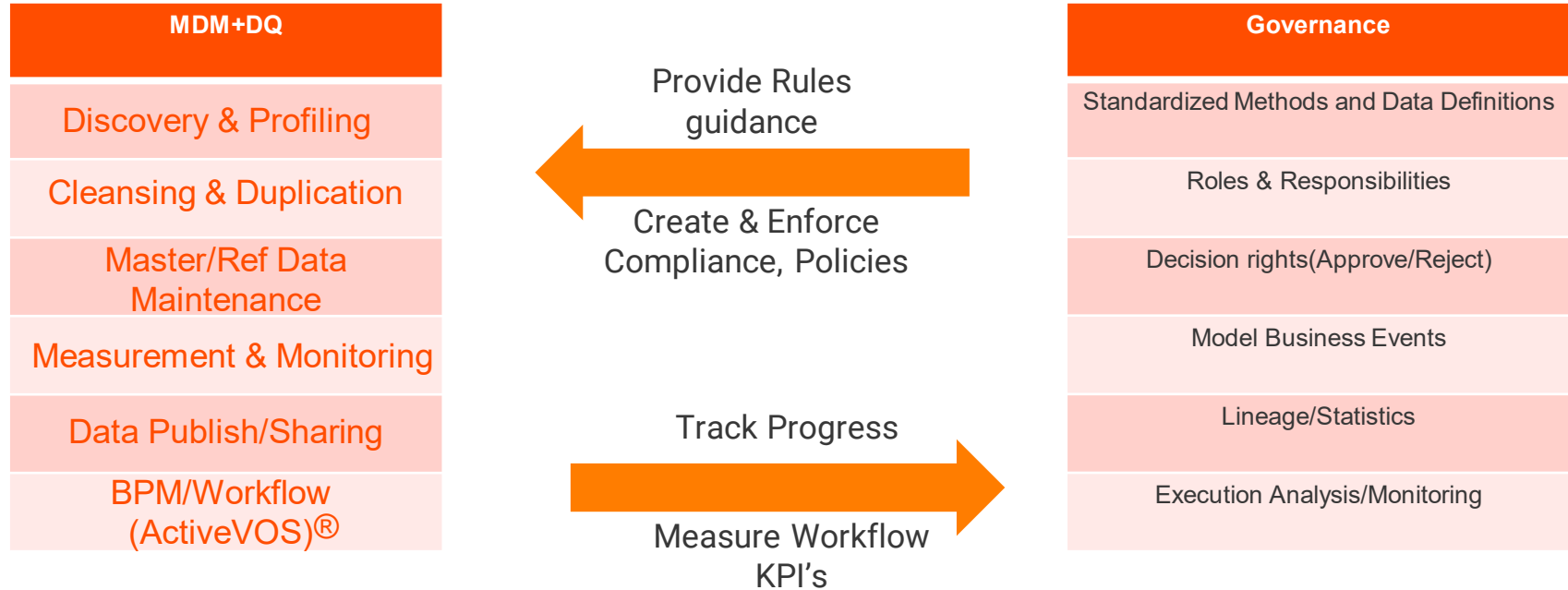
- People are unsure who to ask for right answers
- Communication are point to point / Randomized
- Incorrect info could be used
- Rely on Verbal collaboration -RISKY

## ❖ With Governance

Governing council sets policies such as :

- Defining data owners
- Measure master approval workflow KPI
- Acceptable use of privacy and compliance adherence
- Data Quality processes and retention policies
- 360 data availability to relevant owners
- Business and IT handshake via Portal

# Unleashing power of MDM with governance

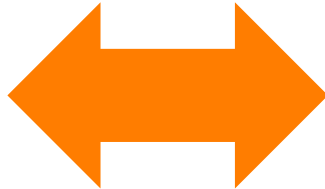


# Business Events Modeling

## 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)

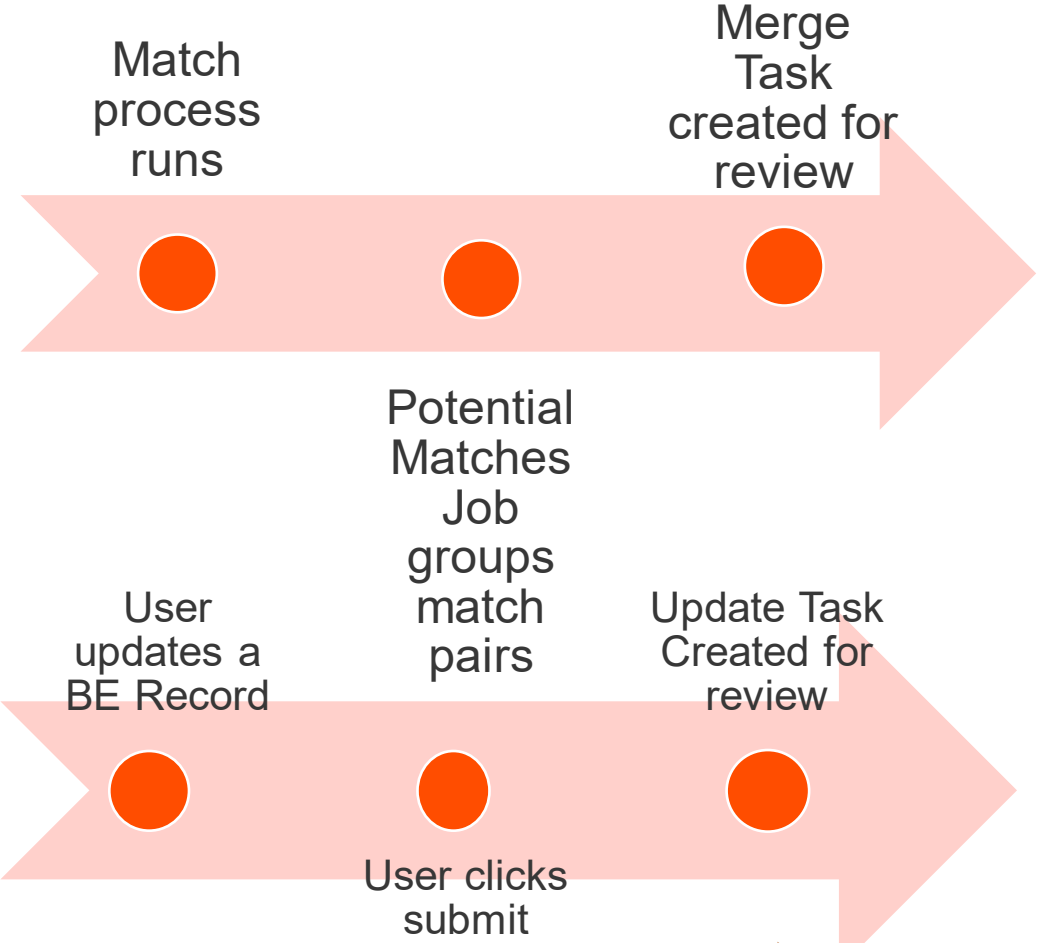
- Workflows
- Load data to S3
- Stream events to Kafka
- Call APIs

ACT

→  
*Simple cause and effect*

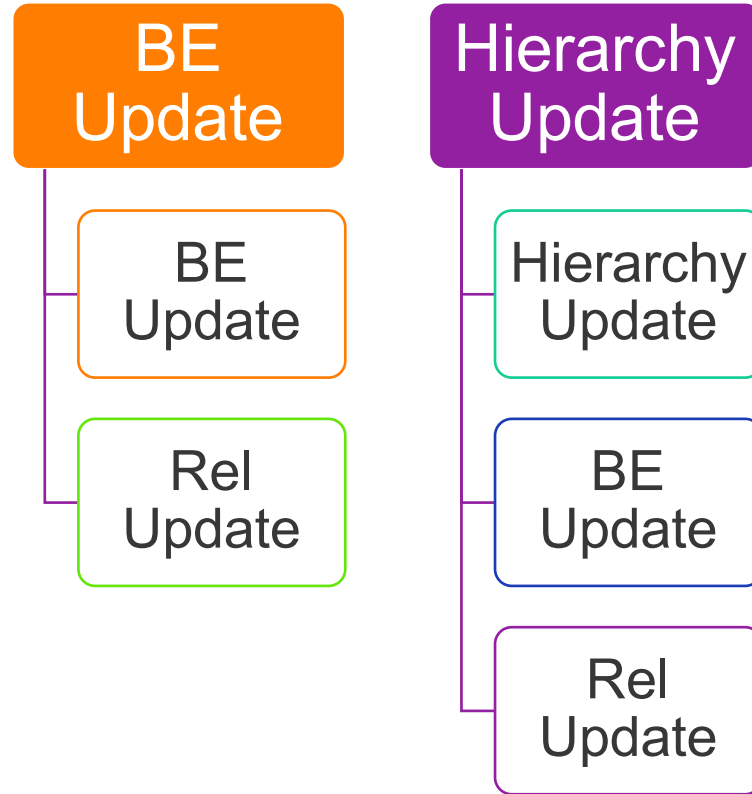
# System Triggered vs User Triggered

- 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.



# Event Scenarios encompass multiple related transactions

- Events are not just single transactions.
- An update to a BE for example may involve updates to the BE data but also relationships associated with the BE
- A Hierarchy update may include updates to the hierarchy, the BE or the relationship



# Demo

# MDM SaaS Governance

(MDM SaaS +Business Events)

# 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 dropdown with 'Person' and a search icon, and a 'savereloadsave' button. The left sidebar contains navigation options: New, Home, Search, File Import, Workflow Inbox, and Hierarchies. The main content area is titled 'Person' and shows search results for 'Person'. On the left, there are filters for 'Address: City' and 'Address: Country'. The search results are displayed in a table with columns for Name, City, State, and Country. Two results, '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)**

Name	City	State	Country
Sachin Tendulkar	Mumbai	Maharashtra	India
Rahul David	Bangalore	Karnataka	India
Amar Anthony	Redwood City	Alaska	United States
<b>KELLY WILLS</b>	Georgia	Alaska	United States
<b>CHARLES WILLS</b>	Atlanta	Alaska	United States

# Manual Review-Workflow

The screenshot shows the Informatica Business 360 Console interface. The top navigation bar includes 'Informatica Business 360 Console', 'save/loads/save', and user profile icons. The left sidebar contains navigation options: 'New...', 'Home', 'Explore', 'Business Events', 'My Jobs', 'Global Settings', 'Reporting Structure', 'Personpotentialmatch', and 'schedule job for me...'. The main content area is titled 'schedule job for merge taskjs' and features a 'Save' and 'Run' button. Below the title, the configuration is as follows:

- Process: **Generate Merge Tasks** (dropdown menu)
- Description: Groups potential matches and generates tasks for groups that require a review.
- Task Limit: 25 (input field)

An orange arrow points from the 'Generate Merge Tasks' dropdown menu to the 'Workflow Inbox' screenshot below.

Assets	
Name	Type
Person	Business Entity

## Generate Merge Task Job

The screenshot shows the 'Workflow Inbox' section of the Informatica Business 360 Console. The left sidebar includes 'New', 'Home', 'Search', 'File Import', 'Workflow Inbox', and 'Hierarchies'. The main content area is titled 'Workflow Inbox' and shows '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, the task details are shown: 'Final Review | Person Merge Approval' with a 'Start' button. At the bottom, the task information is displayed: '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

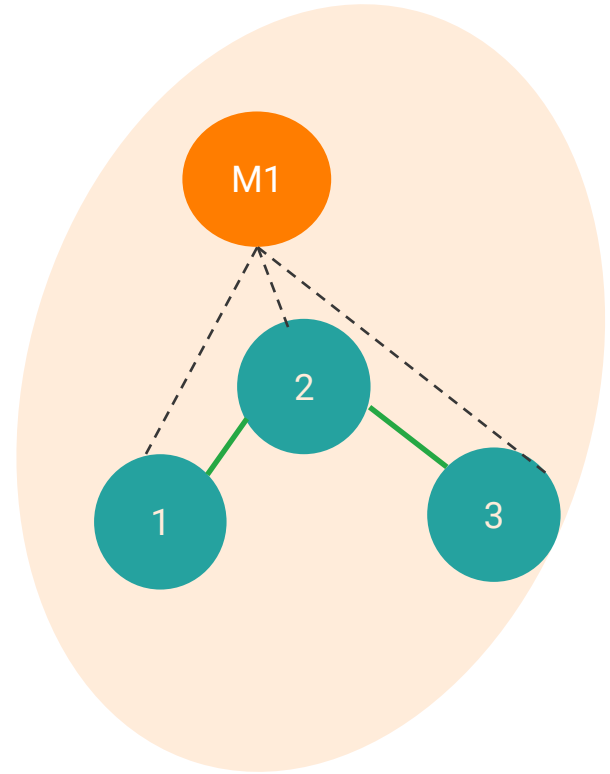
CHARLES WILLS ( Merged R...	CHARLES WILLS	>>	KELLY WILLS	Source System: Informatica Customer 360
▶ System Fields				
First Name : CHARLES	CHARLES		KELLY	<input checked="" type="radio"/> Match
Middle Name :				<input type="radio"/> Not a match
Last Name : WILLS	WILLS		WILLS	<input type="radio"/> Not Sure
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

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



# Unmerge Approval

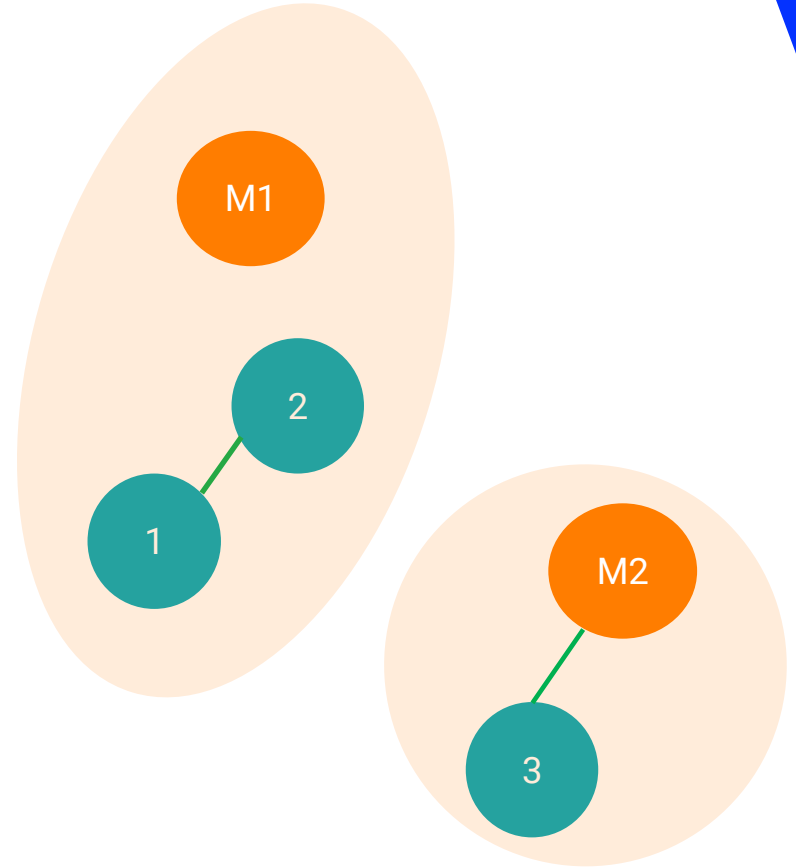
On approval, disconnect unmerged XREF from original master and group it into its own virtual master

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	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



# Task Inbox-Workflow

- **Task Types**
  - Business Entity Create, Update, Delete Task ->Approve/Reject
  - 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

# Layout driven Task Details

- Task details provide more context on what's changed
- Business Entity approvals : BE changes view
- Hierarchy approvals : Hierarchy changes view
- Merge : Master details view

Matching Records	4 of 4 Candidates Selected for Merging	Find	Merge	
<b>Bobby P Newport (Merged Preview)</b>	<b>Bobby Newport</b> Source: Salesforce	<input type="checkbox"/> <b>Bobby C. Newport</b> Source: SAP	<input type="checkbox"/> <b>Bob Newport</b> Source: Salesforce	<input type="checkbox"/> <b>Bob G. Newport</b> Source: Salesforce
<b>Match Explainability</b>	23	21	24	25
<b>System Fields:</b> Last Update: 02/15/16				
Display Name: Bobby P Newport	Bobby P Newport	Bob C. Newport	Bob Newport	Bob G. Newport
First Name: Bobby	Bobby	Bob	Bob	Bob
Middle Name: P	P	C.	-	G
Last Name: Newport	Newport	Newport	Newport	Newport
Credentials: MBBS	MBBS	MBBS	MBBS	MBBS
Gender: Male	Male	Male	Male	Male
Date of Birth: October 20th 1970	Sep, 20th 1970	October 20th 1970	March 20th 1975	December 15th 1985
Place of Birth: Canada	Canada	Germany	United States	United States
LinkedIn URL: .../in/BobbyNewport	.../in/BobbyNewport	.../in/BobNewport	.../in/BobNewport	.../in/BobNewport
KDL Indicator: 55	55	44	44	222
Target Indicator: 222	222	222	222	222
Status: Active	Active	Inactive	Inactive	Inactive
<b>Addresses (5)</b>				

# 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





Finally

MDM without governance is just integration project - [Andrew White](#)

# Questions?



Speaker: KAMAL ABROL

Q/A Panel: Dilip Yeluguri

Customer Success Technologist



Thank You!

• Customer Success Technologist



# References

- <https://docs.informatica.com/master-data-management/multidomain-mdm/10-4-hotfix-2/business-entity-services-guide/appendix-c--using-rest-apis-to-manage-reports/out-of-the-box-reports/managing-the-out-of-the-box-reports.html>
- <https://www.intricity.com/>
- <https://network.informatica.com/videos/3289>