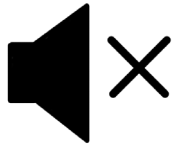

CDQ Exception Management Use-Case

Akshada Sable - Solutions Architect, Customer Success

Sachin Jain - Principal Architect, Customer Success

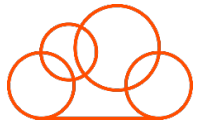


Housekeeping Tips



- 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.

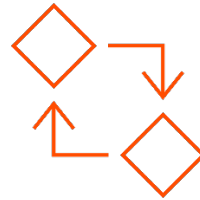
Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions



Informatica
Concierge



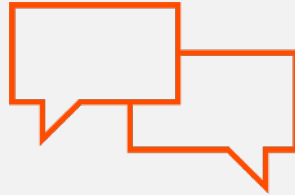
Tailored training and
content
recommendations

More Information



Success Portal

<https://success.informatica.com>



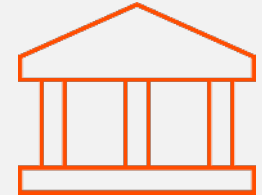
Communities & Support

<https://network.informatica.com>



Documentation

<https://docs.informatica.com>



University

<https://www.informatica.com/in/services-and-training/informatica-university.html>

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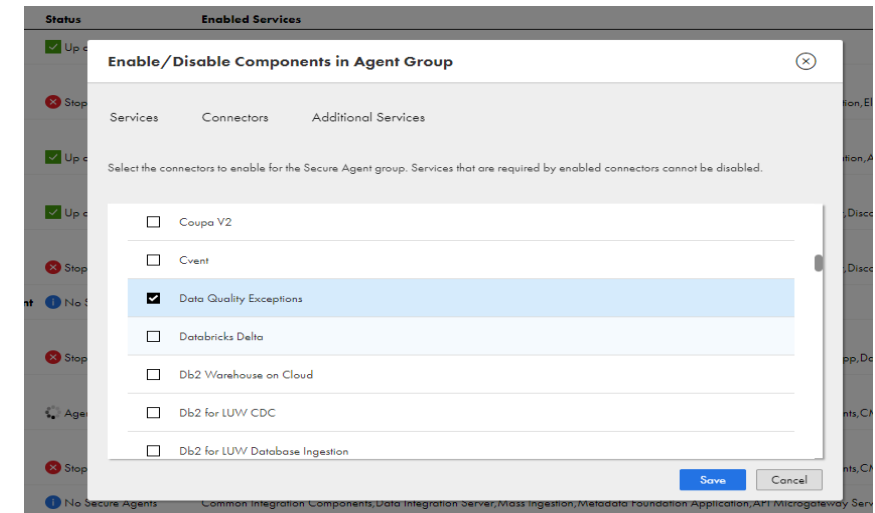
Q&A

Exception Management

Editions and License Bits

Pre-requisites

- Editions:
 - IDMC or one of CDQ Editions
 - Data Governance Edition is needed (Exception Data Store is hosted in HAWK platform)
- License bits
 - DQ Assets – Exception Task (Asset)
 - DQ Exception Management (connector)
- Runtime Agents
 - You must enable “Data Quality Exceptions” Connector



Data Quality Exception Management

Use Case:

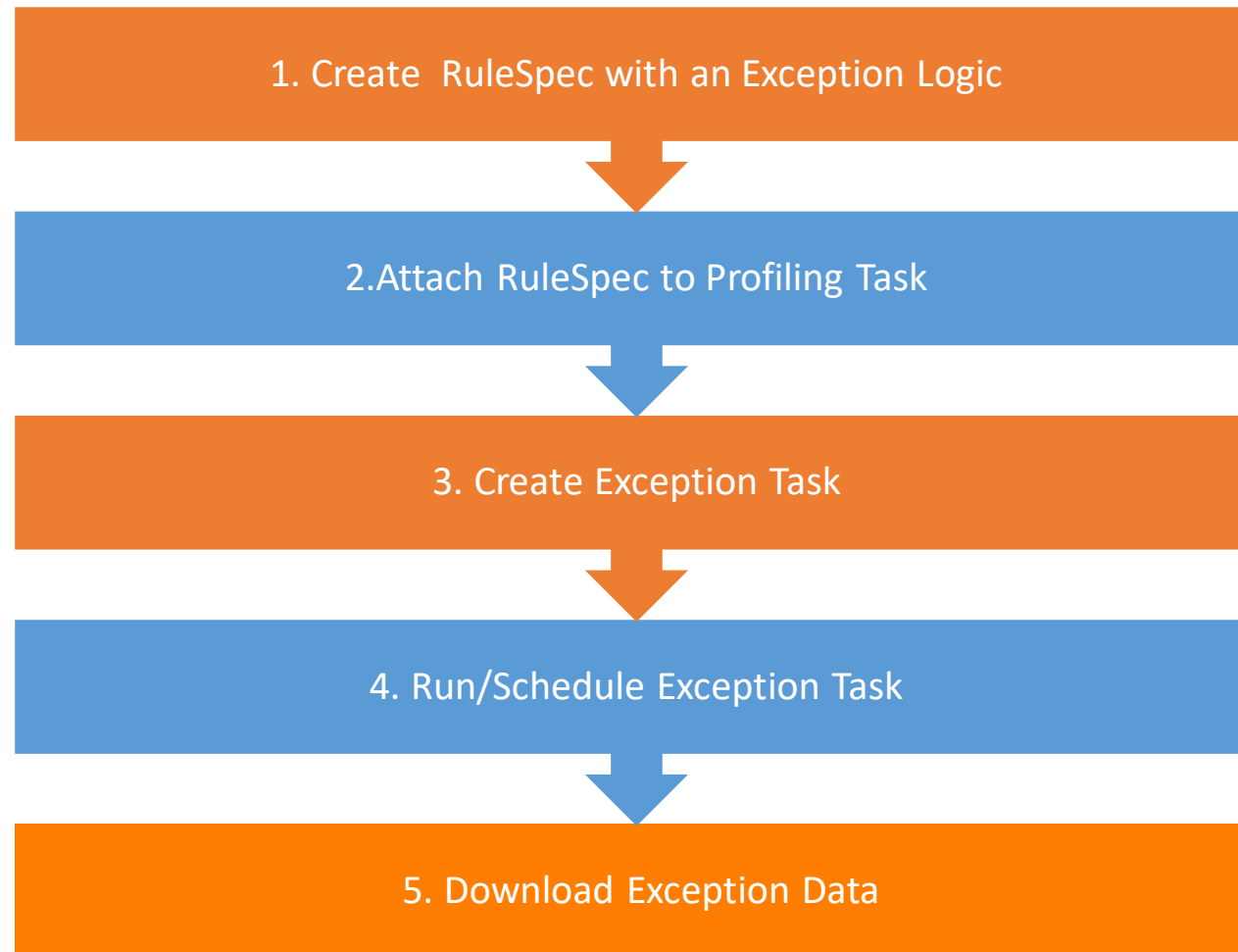
- Ability to identify and view the data that does not meet a data quality criteria

Example:

- DQ Steward working at a multi-national e-Commerce company. He needs to ensure if the quality of the data meets required norms to run the business successfully.
- For example, users tier information details like Customer ID, Customer Tier, First name, address, phone, email, Customer Status, County etc needs to be valid and complete.
- Business users wants to verify the exception data created by DQ Steward



Steps to Identify and Download Exceptions Data



Step 1: Create/Update Rule Spec with an Exception Logic

Define Exception Reason and Exception Priority

The screenshot displays the Informatica Rule Designer interface. A 'Validity' dialog box is open, allowing the user to define an exception. The dialog includes a 'Define Exception' section with the following fields:

- Add Exception Details
- Exception priority: * Critical
- Exception description: * Missing SSN, Phone, EMail

Below the dialog, the 'Action' section of the rule logic is visible. The 'INVALID' status is selected in a dropdown menu, which is circled in orange. The background also shows the 'Rule Logic' section with a table of inputs and logic conditions.

When enabled, rule output captures the exception details

Rule Action must be "Status"

Step 2: Attach RuleSpec to Profiling Task

Profiling is the pipeline between the source data and exception data

Informatica Data Profiling

customer_profile

Results Definition **Rules** Schedule Insights

Rules (4)

<input type="checkbox"/>	Name	Description	Type	Location	Input(s)	Output(s)
<input type="checkbox"/>	c_bra_get...	Standardizes Br...	Cleanse	Akshada_CDQ	Country	c_bra_get_name_standard
<input type="checkbox"/>	A_RS_Null...		Rule Specification	Akshada_CDQ	Address2	PrimaryRuleSet
<input type="checkbox"/>	A_RS_Null...		Rule Specification	Akshada_CDQ	Address3	PrimaryRuleSet
<input checked="" type="checkbox"/>	AksRuleSp...		Rule Specification	Akshada_CDQ	Address1	ExceptionDescription, ExceptionPriority, PrimaryRuleSet

Rules WITHOUT Exception Logic

Rules WITH Exception Logic

Step 3: Create Exception Task

Exception task clones the exception data into exception store

The screenshot shows the Informatica Data Profiling interface. The browser address bar indicates the URL: `na1-dqprofile.dm-us.informaticacloud.com/profiling-ui/main/profile/9EipRAV1BLWg3yTMC7ssU7`. The interface displays the 'customer_profile' configuration page, specifically the 'Rules' tab. A table lists four rules, with the third rule, 'AksRuleSpec_Exc...', selected. A context menu is open over the table, with the 'Create Exception Task' option highlighted in red.

Rules (4)	Name	Description	Type	Location	Input(s)	Output(s)
<input type="checkbox"/>	A_RS_NullCheckS...		Rule Specification	Akshada_CDQ	Address2	PrimaryRuleSet
<input type="checkbox"/>	A_RS_NullCheckS...		Rule Specification	Akshada_CDQ	Address3	PrimaryRuleSet
<input checked="" type="checkbox"/>	AksRuleSpec_Exc...		Rule Specification	Akshada_CDQ	Address1	ExceptionDescription, E...
<input type="checkbox"/>	c_bra_get_name_s...	Standardizes Brazil na...	Cleanse	Akshada_CDQ	Country	c_bra_get_name_stand...

- Create Exception Task Option is only visible after the save
- License must be present to see this option

Step 4: View and Run Exception Task

The screenshot displays the Informatica Data Profiling web interface. The top navigation bar shows 'Informatica Data Profiling' and the user 'Informatica_CST_TEAM'. The left sidebar contains a 'New...' button and a list of jobs: 'customer_profile', 'testException' (selected), and 'ExceptionTTFinal-1'. The main content area is titled 'testException' and has two tabs: 'Definition' (active) and 'Schedule'. The 'Task Details' section includes the following fields:

- Task Name: * testException
- Location: Akshada_CDQ (with a 'Browse' button)
- Description: (empty text area)
- Runtime Environment: Akshada_RTEs (dropdown menu)

The 'Asset Reference' section shows:

- Profiling Task: [Aks_Profile_ExceptionTest](#)
- Rule-1: [AksRuleSpec_Exception](#)

At the top right of the main area, there are navigation buttons: '< Back', 'Next >', 'Save', 'Run', and a close button.

- *Target connection (to Exception Data Store) is auto created during the exception task creation*
- *User DO NOT have to create target connection*

Step 5: Download Exception Data

Downloads CSV file with exception data to your local disk

The screenshot displays the Informatica Data Profiling interface. The top navigation bar includes the Informatica logo, 'Data Profiling', and the user 'Informatica_CST_TEAM'. The main content area shows details for a job named 'ExceptionTTFinal-1' on 'Feb 8, 2023'. The 'Job Properties' section lists: Task Name: ExceptionTTFinal, Instance ID: 1, Task Type: Exception Task, Started By: Akshada_cst, and Start Time: Feb 6, 2023, 4:56:48 AM. The 'Results' section shows: Status: Success, Success Rows: 2499, Error: 0, and Error Message: No errors encountered. A 'Session Log' link is available. A 'Save As' dialog box is open in the foreground, showing the 'Downloads' folder with a table of files:

Name	Date modified	Type	Size
Today (2)			
pt_Exception1-1	01/12/2022 16:19	Microsoft Excel Co...	0 KB
Exception_Multiple_Exception_Rules-5	01/12/2022 16:14	Microsoft Excel Co...	14 KB
Yesterday (1)			

The dialog box also shows 'File name: em_CheckContact-1' and 'Save as type: Microsoft Excel Comma Separated Values File'. A red box highlights the 'Exception Data' section in the main interface, containing 'Download Exception Data' and 'Delete Exception Data' links. A blue arrow points from this box to the text on the right.

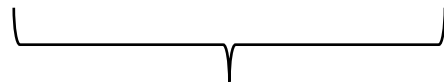
- Users can Download Exception Data to local disk.
- Users can delete if they no longer want to keep the data in the store.
- Only privileged users can delete / download

Step 5: Download Exception Data (contd.,)

Sample exception data

Exception Metadata Columns

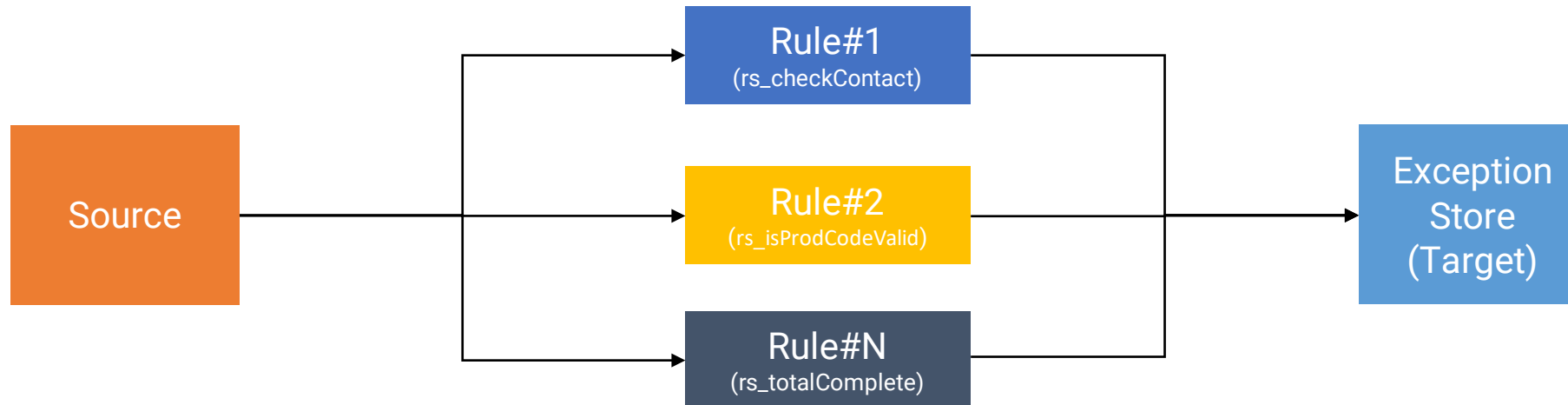
Customer	Address1	City	CreateDat	Firstname	Customer	State	Currency	Col	OrderAmc	PrefDeliv	Exception Message	Priority	Rule Name
15952410	88 PINE ST	NEW YORK	28/08/198	Larry	3	NY	USD		61118	United Pa	Invalid Customer Tier data	Major	CustomerTierValidat
15952416	18385 FRC	DAHLGREI	26/08/199	Kim	3	VA	USD	US	39724	United Pa	Invalid Customer Tier data	Major	CustomerTierValidat
10110508	5000 ARLI	COLUMBU	29/07/199	Paul		OH	USD	US	41399	US Posta	Invalid Customer Tier data	Major	CustomerTierValidat
15952425	ONE MAN	PURCHASE	#####	Nancy	1	NY	USD	US	6219	Federal B	Invalid Customer Tier data	Major	CustomerTierValidat
15952427	1010 WISC	WASHING	28/07/198	Lynn		DC	USD	US	47324	US Posta	Invalid Customer Tier data	Major	CustomerTierValidat



Source Data

Create Exception Task - Mapping

Exception Task Mapping: Source + Rules + Target



- *Exception Data Store **Target connection** is auto created during the Exception Task creation*
- *User DO NOT have to create target connection*
- *Connect Name: DQ_Exception_<Agent_ID#>*

Runtime Agents and Exceptions Store Connectors

Informatica Administrator

Organization

Licenses

SAML Setup

Metering











Settings

Users

User Groups

Connections

Configure connections to work with applications, databases, and files.

Actions	Name▲	Type	Runtime Environment
    	DQ_EXCEPTION_010X5308000000000008	Data Quality Exceptions (Informatica Cloud)	SachinCST
    	DQ_EXCEPTION_010X530800000000000G	Data Quality Exceptions (Informatica Cloud)	Akshada_RTEs

Supported Ecosystems and Runtime

Exception Management

- Do we support on all ecosystems / all PODs?
 - Only on AWS
 - Due to dependency on HAWK platform, exception management is only supported in AWS Ecosystem
 - AWS PODs:
 - All US, CAN, EMEA, UK, APAC
 - NOT supported on Azure, GCP
- What runtime/agents/runtimes are supported?
 - Secure Agent
 - Non-Elastic Serverless
 - NOT supported for Elastic runtime

References

- Cloud Exception Management: [Click Here](#)
- Cloud Data Quality : [Click Here](#)
- Cloud Data Profiling: [Click Here](#)
- Cloud Data Rule Specifications: [Bulk Upload Business Metadata](#)
- Cloud IDMC: [Click Here](#)

DEMO

CDQ – Exception Management Use Case

