

14 Jan, 2025

Design and Development: Business 360 Console – Part 1

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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.

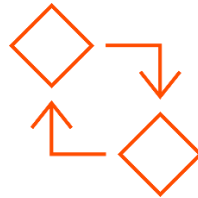
Feature Rich Success Portal



**Bootstrap trial and
POC Customers**



**Enriched Customer
Onboarding
experience**



**Product
Learning Paths
and Weekly
Expert Sessions**



**Informatica
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**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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Design & Development: Business 360 Console

Where data & AI come to **LIFE**

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Agenda

- 1 Business 360 Data Model
- 2 Pre-defined Assets
- 3 OOTB Business Application solutions
- 4 Create Entity, Field Group and Smart Field
- 5 Data Quality (Overview – Basic & Advanced Data Quality)
- 6 Role Based Access Control - RBAC

Agenda

- 7 Attribute Based Access Control - ABAC
- 8 Global Settings walkthrough
- 9 Q&A Session

BUSINESS 360 CONSOLE

- One of several services available in IICS (Informatica Intelligent Cloud Services).
- Provides a platform for master data management SaaS.

Informatica Intelligent Cloud Services Log Out

My Services

API Manager	API Portal	Application Integration
Application Integration Console	Business 360 Console ★	Customer 360
Data Governance and Catalog	Data Ingestion and Replication	Data Integration
Data Profiling	Data Quality	Human Tasks

INFORMATICA INTELLIGENT CLOUD SERVICES

✓ Services apply to master data management :

- ✓ **Administrator**
- ✓ **Monitor**
- ✓ **Application Integration**
- ✓ **Data Integration**
- ✓ **Data Quality**
- ✓ **Reference 360**
- ✓ **Business 360 Console**

The screenshot displays the Informatica Intelligent Cloud Services dashboard. At the top left is the Informatica logo and the text "Informatica Intelligent Cloud Services". At the top right is a "Log Out" link. Below the header is a section titled "My Services" which contains a grid of service tiles. Each tile consists of an orange icon on the left and the service name on the right. Some tiles also feature a gold star icon. The services shown are: API Manager, API Portal, Application Integration (with star), Monitor (with star), Business 360 Console (with star), Customer 360, Reference 360 (with star), Administrator (with star), Data Integration (with star), Data Profiling, Data Quality (with star), and Human Tasks. At the bottom left of the grid is a blue link that says "Show all services".

BUSINESS 360 CONSOLE

Business 360 Console is the platform for Master data management SaaS

- Design master data management projects to fit customer's business needs.
- Create Business entities & define relationships between them
- Data validation rules.
- Match rules, survivorship rules.
- Manage service integrations, run and monitor batch jobs.
- Custom user interface

OOTB BUSINESS APPLICATION SOLUTIONS

- **Customer 360**
- **Product 360**
- **Supplier 360**
- **Multidomain MDM**

The screenshot displays the Informatica Intelligent Cloud Services dashboard. At the top left is the Informatica logo and the text 'Intelligent Cloud Services'. At the top right is a 'Log Out' link. Below the header is a section titled 'My Services' which contains a grid of service tiles. Each tile features an orange icon on the left and the service name on the right. Some tiles also have a gold star icon in the top right corner. The services shown are: Data Profiling, Data Quality, Human Tasks, Customer 360, Multidomain MDM, Product 360, Reference 360, Supplier 360, Administrator, Monitor, and Operational Insights.

Service Name	Star Icon
Data Profiling	No
Data Quality	No
Human Tasks	No
Customer 360	Yes
Multidomain MDM	Yes
Product 360	Yes
Reference 360	No
Supplier 360	Yes
Administrator	No
Monitor	No
Operational Insights	No

PREDEFINED CUSTOMER 360 SAAS ASSETS

- **Business Entities**
 - Person business Entity
 - Organization business Entity

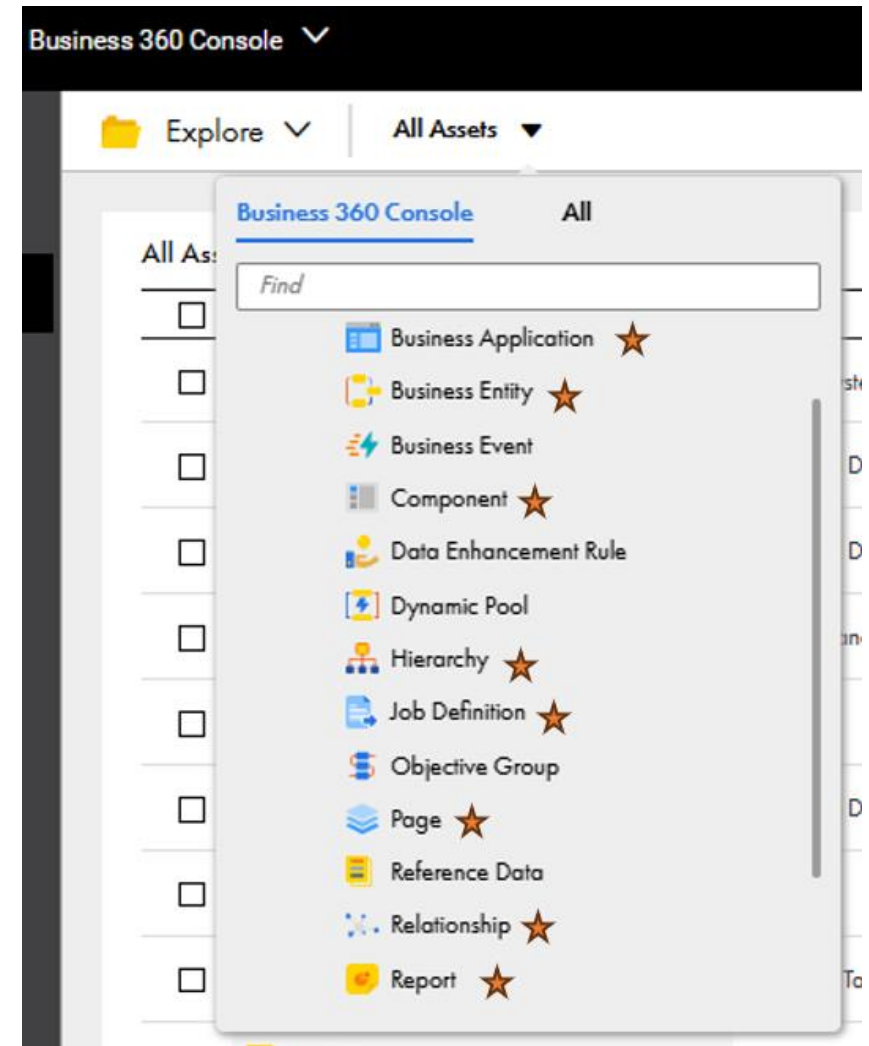
Explore ▾ | All Assets ▾ Business Entity

Business Entity (13) | None Selected ▾

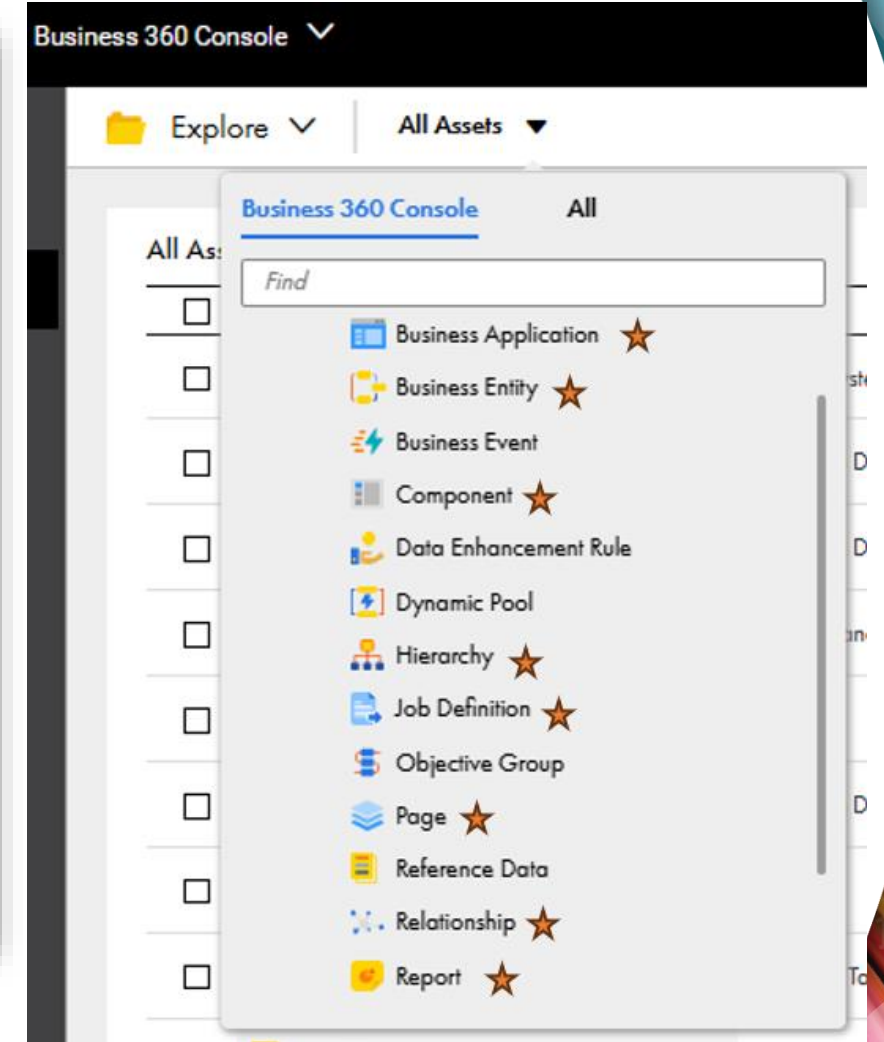
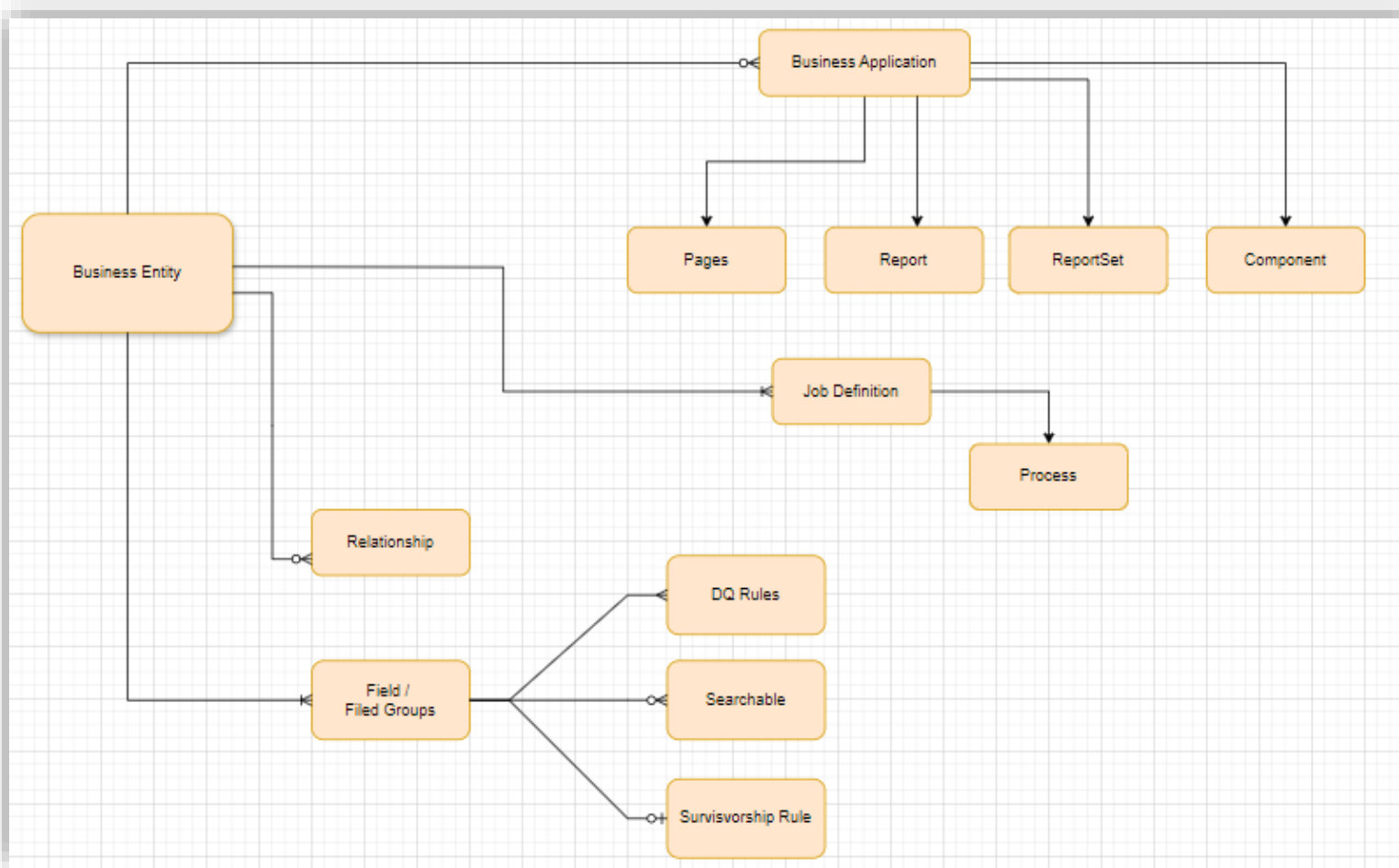
<input type="checkbox"/>	Name	Updated On	Location
<input type="checkbox"/>	Organization	Sep 21, 2024, 9:33 AM	Customer360
<input type="checkbox"/>	Person	Dec 3, 2024, 9:29 AM	Customer360

PRE-DEFINED ASSETS IN BUSINESS 360 CONSOLE

Asset Type	Description
Business Entity	An entity of importance that consists of fields that might support your data needs. The predefined business entities help you get started, and you can later customize them.
Business Application	A business application that uses the predefined data model.
Component	User interface components, such as pages and search layouts of business applications
Job Definition	An executable instance of a predefined process.
Page	Pages that the business applications display for users to view or edit data.
Process	Cloud Application Integration processes that orchestrate jobs.
Relationship	relationship between two predefined business entities that have some type of association.
Report Set	A container for a set of reports.
Report	A visual representation of data in the form of charts and table.
Rule Specification	Rules that the business applications use to validate data.
Source System	Source system that business applications use as the default data source.



PRE-DEFINED ASSETS IN BUSINESS 360 CONSOLE



STEP TO CREATE CUSTOM DATA MODEL/UPDATE EXISTING DATA MODEL

1. Define custom business entity
2. Add fields to the BE
3. Configure searchable field
4. Configure data quality rules
5. Configure survivorship rules and rank source systems
6. Create a match model
7. Define relationships between business entities
8. Define business entity hierarchies
9. Create custom pages to view and edit records
10. Add custom pages and search result layouts to your business application
11. Add business entities to your business application
12. Create layouts for search results

DEFINE CUSTOM ENTITY/UPDATE PREDEFINED BUSINESS ENTITY

- New --> New Asset--> Model --> Business Entity--> Create

New Asset

Select an asset category and create an asset.

Model

Source Systems

Business Applic...

Jobs



Business Entity

Define a business entity and



Reference Data

Define reference data, which



Hierarchy

The screenshot shows the Business 360 Console interface with a 'New Business Entity' dialog box open. The dialog box contains the following fields and options:

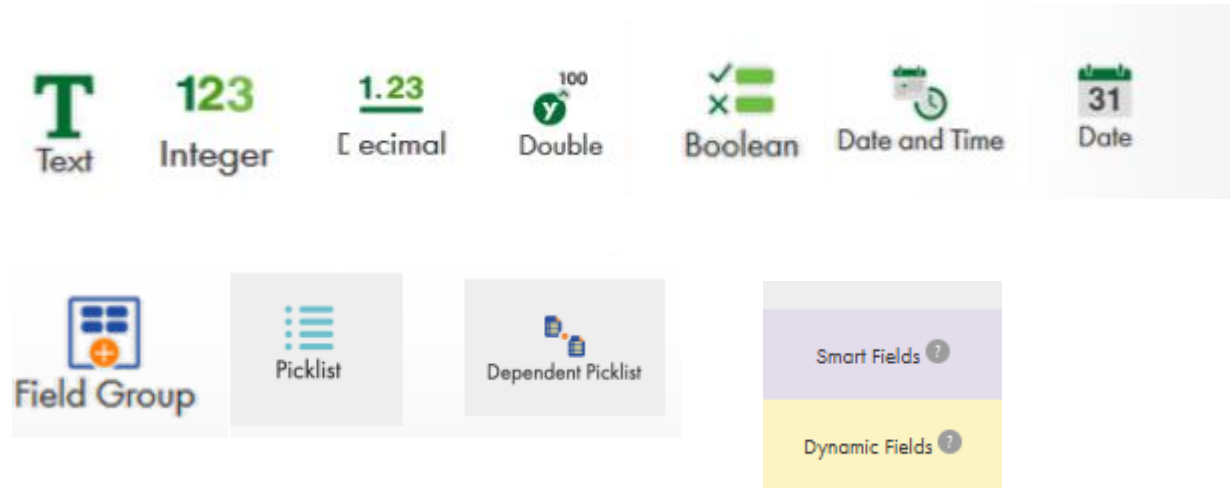
- Display Name:** Party
- Internal ID:** party
- Description:** (empty text area)
- Location:** Aditya_C360 (with a 'Browse...' button)
- Icon:** A grid of icons with a person icon selected.
- Error Remediation:** Enable
- Business ID Format:** MDM 000000000000 (with 'Prefix' and 'Total Length' labels below)
- Alphanumeric:** (with 'Total Length' and 'Prefix' fields below)

The 'Alphanumeric' section shows 'Total Length' set to 14 and 'Prefix' set to MDM. The dialog has 'OK' and 'Cancel' buttons at the bottom right.

HOW TO ADD/MODIFY FIELD TO BUSINESS ENTITY

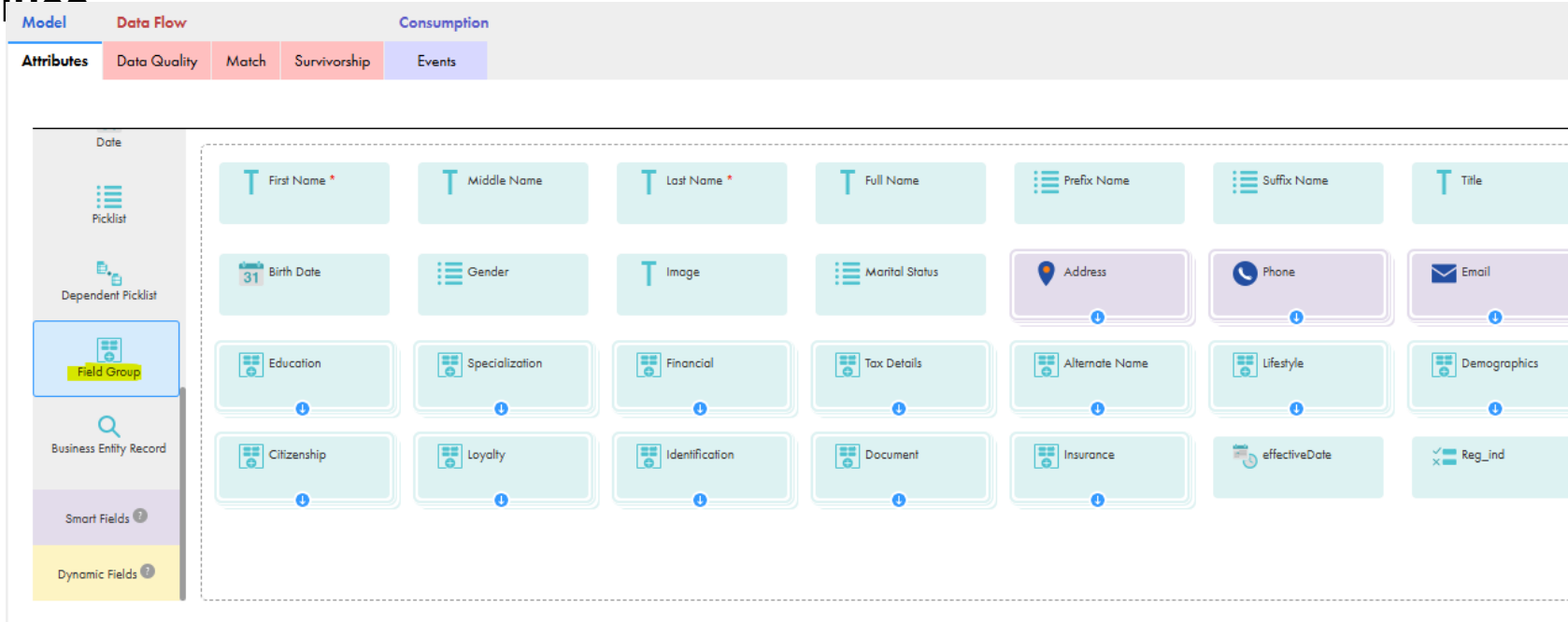
- **Types of fields to business entities**

- Text
- Integer
- Double
- Decimal
- Boolean
- Date and Time
- Date
- Field Group
- Picklist
- Dependent Picklist
- Smart field
- Business Entity Record
- Dynamic Field



FIELD GROUP

Use a field group to group multiple related fields and store multiple entries of field values



Picklist & Dependent Picklist

- List of values contained in a reference data asset
- List of values that a dependent reference data asset contains

SMART FIELD

- Smart fields are context-aware fields that have predefined properties
- Smart fields are building blocks for common fields, such as address, email, and phone

Smart fields Available in GA



Postal
Address



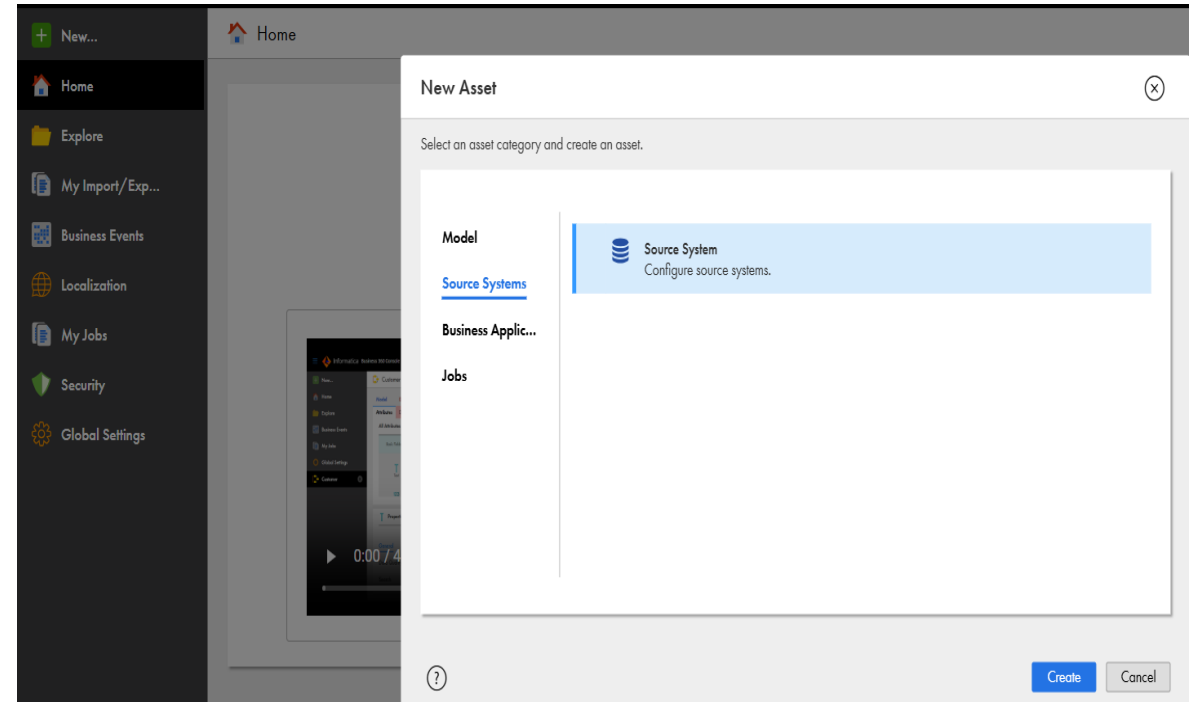
eMail



Phone

SOURCE SYSTEM

- A source system is an original system where the data is stored/created
- Data from different source systems will be transferred to MDM and processed for BVT.
- Defining a source system will help in identifying the source of the record.
- Along with predefined source systems we can create a custom source system
- Navigate to B360 console -> Click New -> select source system -> Create, provide the name and internal id
- Can use this source system during data load of ingress/file import.



DEMO

STEP TO CREATE CUSTOM DATA MODEL/UPDATE EXISTING DATA MODEL

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DEMO

DATA ACCESS RULES

- Data access rules are set of settings/policies that control how the data can be accessed, managed within the system
- Data Access rules include:
 - ✓ user permissions
 - ✓ access levels (Read/write/update/delete)
 - ✓ conditions for access
- Types of data access rules:
 - RBAC (Role based data access)
 - ABAC (attribute-based data access)



RBAC

Use case:

- **Multiple Business Entities (BE):** Organization, Person, Product, Supplier
- **Custom Roles:** Created for different user responsibilities
- **Access Control:**
 - Users get access based on their role.
 - Access is granted to relevant BE data only.
 - Unwanted access is restricted.

Overview:

- restricts system access based on the custom roles
- Roles have specific permissions.
- Users get permissions based on their assigned roles.
- Navigate to the B360 console -> security tab, select the custom role

The screenshot displays the Informatica B360 console interface. On the left is a dark sidebar with navigation icons for 'New...', 'Home', 'Explore', 'My Import/Exp...', 'Business Events', 'Localization', 'My Jobs', 'Security', and 'Global Settings'. The main content area is titled 'Customer Read only' and shows a 'Business Entities (7)' table with columns for Name, Metadata, Records, and Attributes. The 'Customer' entity is selected. To the right, the 'Customer' entity details are shown, including a table of attributes with checkboxes for 'Cr...', 'Re...', 'Up...', and 'De...'.

Name	Metadata	Records	Attributes
<input type="checkbox"/> CustomBE	No Access	No Access	No Access
<input checked="" type="checkbox"/> Customer	Partial Acc...	Partial Acc...	Partial Acc...
<input type="checkbox"/> HCP	No Access	No Access	No Access
<input type="checkbox"/> NullChild	No Access	No Access	No Access
<input type="checkbox"/> Organization	No Access	No Access	No Access
<input type="checkbox"/> Party	No Access	No Access	No Access

Name	Cr...	Re...	Up...	De...
First Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Full Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Age	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ABAC

Use case:

- Restrict data access to users of based on type of record.
Restrictions for Record, Field group, Attributes.

Overview:

- Access is granted or denied based on attribute values.
- The rule system checks attributes to allow or deny access.
- Navigate to B360 console -> Security tab-> data Access rules -> select the BE(Assets to protect)-> select the role-> In conditions tab create a conditions to restrict the records/attributes

Internal Access Edit X

Asset to Protect **Conditions**

Rule Definition

Asset to Protect: Customer (Business Entity)

Permission: Deny

Rule Applies To: Record Level

Conditions (1) ? Configure conditions for searchable fields.

Condition Details

Asset Type: Business Entity

Attribute: Type

Operator: equals to

Name

Customer | Type equals to "External"

DEMO

DATA QUALITY

- Ensures data is accurate, reliable, valid, and consistent.
- Used to cleanse, validate, and enrich data.
- Types of DQ:
 - Basic DQ rules
 - Advance DQ rules
 - Daas(data as a service)

BASIC DQ RULES

Overview:

- Simple functions like concatenate, max length, trim, etc.
- Applied to fields and field groups.
- Used to validate and transform data.
- Validation: min length, contains, min value.
- Transformation: concatenate, replace, change case

The screenshot shows the Informatica Data Quality console interface. At the top, there's a breadcrumb 'Customer' with a green checkmark and 'Valid' status. A 'Save' button and a close icon are also visible. Below the breadcrumb, there are tabs for 'Model', 'Data Flow', and 'Consumption'. Under 'Data Flow', there are sub-tabs for 'Attributes', 'Data Quality', 'Match', 'Survivorship', and 'Events'. The 'Data Quality' tab is active. A toolbar shows icons for delete, undo, redo, and a 'Show: Enabled Fields' dropdown. The main workspace displays a visual representation of data fields: 'Basic Fields', 'FirstName', 'LastName', 'FullName' (highlighted with an orange border), '123 Age', and 'Address'. Below this, a 'Properties: FullName' panel is open, showing a 'General' tab and a 'Data Quality' sub-tab. The 'Data Quality' sub-tab contains a table with one rule configuration.

Order	Rule Associati...	Function Name	Status	Description	Created By	Updated On
1	FullNM	Concatenate	Enabled		amandal@infor...	Jan 6, 2025, 1...

ADVANCE DQ RULES

Overview:

- Rules are created in Cloud Data Quality (CDQ).
- CDQ rule specification will be mapped to fields in B360
- Use predefined or custom rules.
- ADQ rules requires input and output fields to be mapped to be fields
- Can be used to validate if the fields are having a valid format like SSN.

The screenshot displays the Informatica Cloud Data Quality (CDQ) interface for configuring a rule. At the top, the entity 'Customer' is selected, and a green checkmark indicates the rule is 'Valid'. A 'Save' button and a close icon are visible in the top right corner.

The interface is divided into several sections:

- Model:** Includes 'Data Flow' and 'Consumption' tabs.
- Attributes:** Includes 'Data Quality', 'Match', 'Survivorship', and 'Events' tabs.
- Basic Fields:** A list of fields is shown, with 'Active' highlighted in an orange box. Other fields include 'Type' and 'Sensitivity'.
- Properties:** A section titled 'Properties: Active' is visible.
- General:** A section for general rule configuration.
- Data Quality:** A table showing rule associations.
- Search and Rep...:** A section for search and replication settings.
- Survivorship:** A section for survivorship settings.

The 'Data Quality' table contains the following data:

Rule Association ...	Status	Description	Rule Specification Updat...	Rule Specification
Active Status	Enabled		Jan 7, 2025, 5:35 AM	BooleanCheck

DAAS(DATA AS A SERVICE):

Overview:

- OOTB service for cleansing Phone, Email, and Address data.
- Rule association links field group with Informatica DAAS.
- Applied to fields storing postal address, email, and phone numbers.
- Requires a license configured in global settings.
- Can be used in real-time or batch.
- Mapping required for input and output fields.
- DAAS rule association triggers data cleansing once data is loaded.
- Can use OOTB smart field groups (address, phone, email) with predefined mappings.

The screenshot shows the Informatica DAAS configuration interface for a 'Customer' model. At the top, there is a 'Customer' label with a green checkmark and 'Valid' status, and a 'Save' button. Below this, there are tabs for 'Model', 'Data Flow', and 'Consumption'. Under 'Data Flow', there are sub-tabs for 'Attributes', 'Data Quality', 'Match', 'Survivorship', and 'Events'. The 'Attributes' tab is active, showing a visual representation of data fields: 'Basic Fields', 'T', 'FirstName', 'LastName', 'FullName', '123 Age', and 'Address'. The 'Address' field is highlighted with an orange border. Below the field representation, there is a 'Properties: Address' section with a 'General' tab. The 'General' tab shows 'DaaS Batch' and 'DaaS Real-time' options, with 'DaaS Real-time' selected. Below this is a table with columns: 'Data Provider', 'Mapping Name', 'Rule Name', 'Status', 'Created By', and 'Updated On'. The table contains one row: 'Address Verification D...' (Data Provider), 'Customer Address DaaS' (Mapping Name), 'Contains the configured DaaS rule for i...' (Rule Name), 'Enabled' (Status), 'amandal@informatica...' (Created By), and 'Jan 7, 2025, 11:46' (Updated On).

DEMO

BEST PRACTICES:

❑ Basic DQ:

- For boolean fields use ADQ.
- Enable "Run rule association even if all input fields are empty" to validate empty fields.
- Error remediation allows saving records regardless of severity.
- Define the execution order of basic DQ rules.
- Basic DQ rules execute before ADQ rules if both are applied to a field

❑ Advance DQ:

- After modifying a rule in Cloud Data Quality, reselect or reset fields in Business 360 Console
- ADQ rules run in parallel, execution order cannot be defined.
- For Boolean fields, use 0 and 1 (not True/False) in basic mode.
- ADQ are not supported for Dynamic fields

BEST PRACTICES::

□ DaaS:

- Basic and advanced rules can't be added when DaaS validation is enabled.
- BE field must be mapped to country field for address verification.
- If no mapping to country field, real-time validation won't work.
- Block survivorship should be enabled with DaaS.

Global Settings walkthrough

Global settings include license keys and files, Informatica Global Customer Support access, and data purge.

The screenshot shows the Informatica Business 360 Console interface. The top navigation bar includes a hamburger menu, the Informatica logo, and the text 'Informatica Business 360 Console'. The left sidebar contains several menu items: 'New...', 'Home', 'Explore', 'My Import/Exp...', 'Business Events', 'Localization', 'My Jobs', 'Security', and 'Global Settings'. The 'Global Settings' item is highlighted with a red circle. The main content area is titled 'Global Settings' and has three sub-tabs: 'Licenses', 'Purge Data', and 'Reports'. The 'Licenses' tab is selected and highlighted with a red circle. Below the tabs, the 'Licenses' section is divided into three sub-sections: 'Real-time Address Verification', 'Batch Address Verification', and 'Email and Global Phone Verification'. The 'Real-time Address Verification' section contains two input fields: 'Account ID' with the value '77555' and 'Cloud Token' with a masked value '.....'. The 'Batch Address Verification' section contains one input field: 'License 1' with the value 'GYAFBPVBQ6ETY2N5.LIC'. The 'Email and Global Phone Verification' section contains two input fields: 'License Key for Email Verification' and 'License Key for Global Phone Verification', both of which are currently empty.

Questions?



Thank You

Where data & AI come to **LIFE**

