

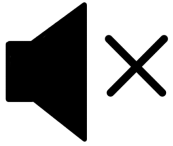
Apr 5th, 2022

Informatica IDMC and MDM SaaS Conceptual Architecture

Sourya Dass, Solutions Architect, Customer Success Management

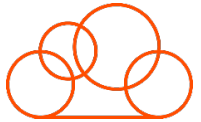


Housekeeping Tips



- 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.

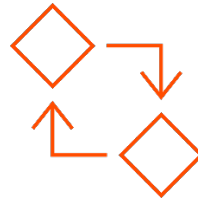
Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions



Informatica
Concierge



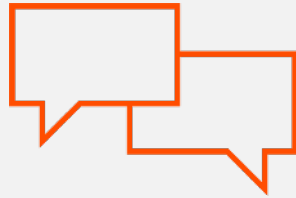
Tailored training and
content
recommendations

More Information



Success Portal

<https://success.informatica.com>



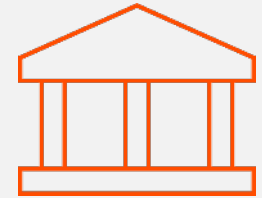
Communities & Support

<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.

04/05/2022

Informatica IDMC and MDM SaaS Conceptual Architecture

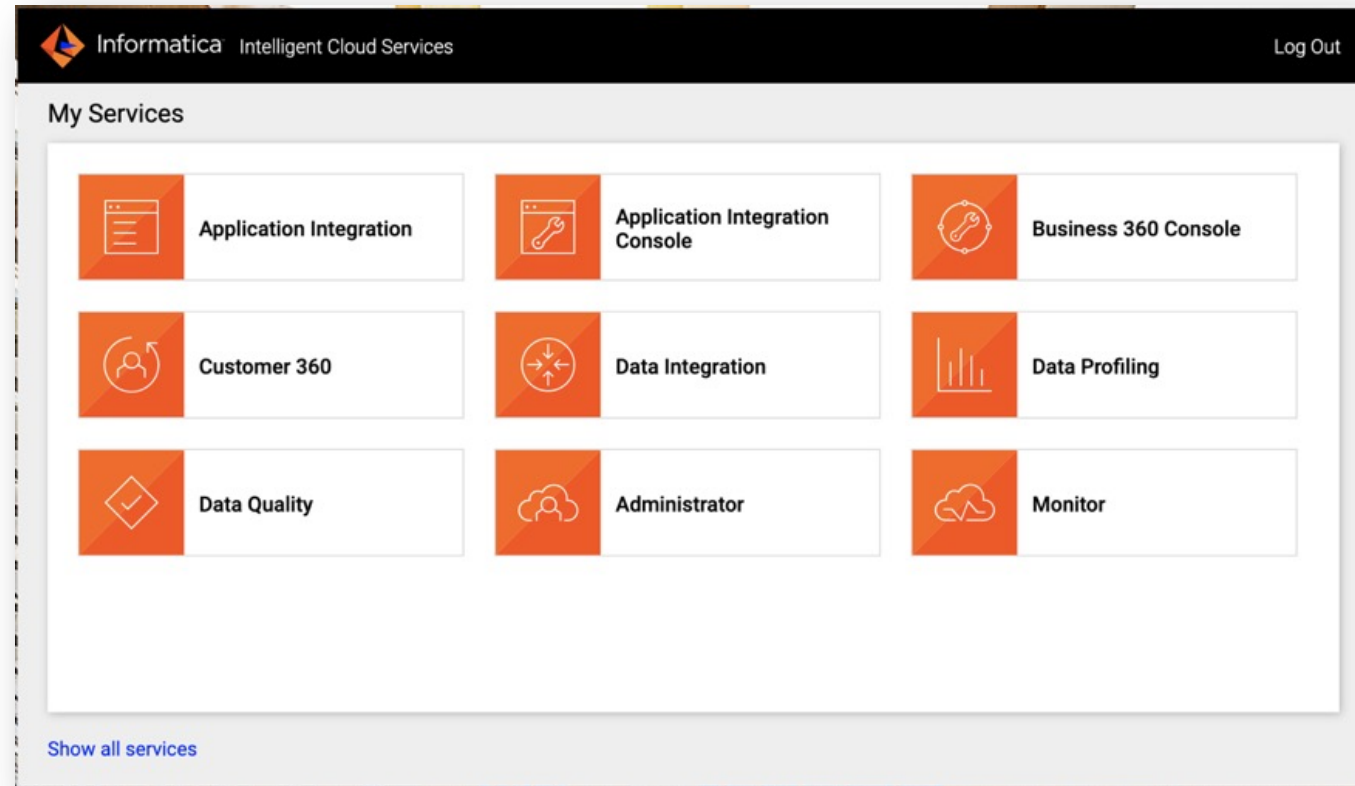
Sourya Dass

Senior Solutions Architect, Customer Success

What is SaaS ?

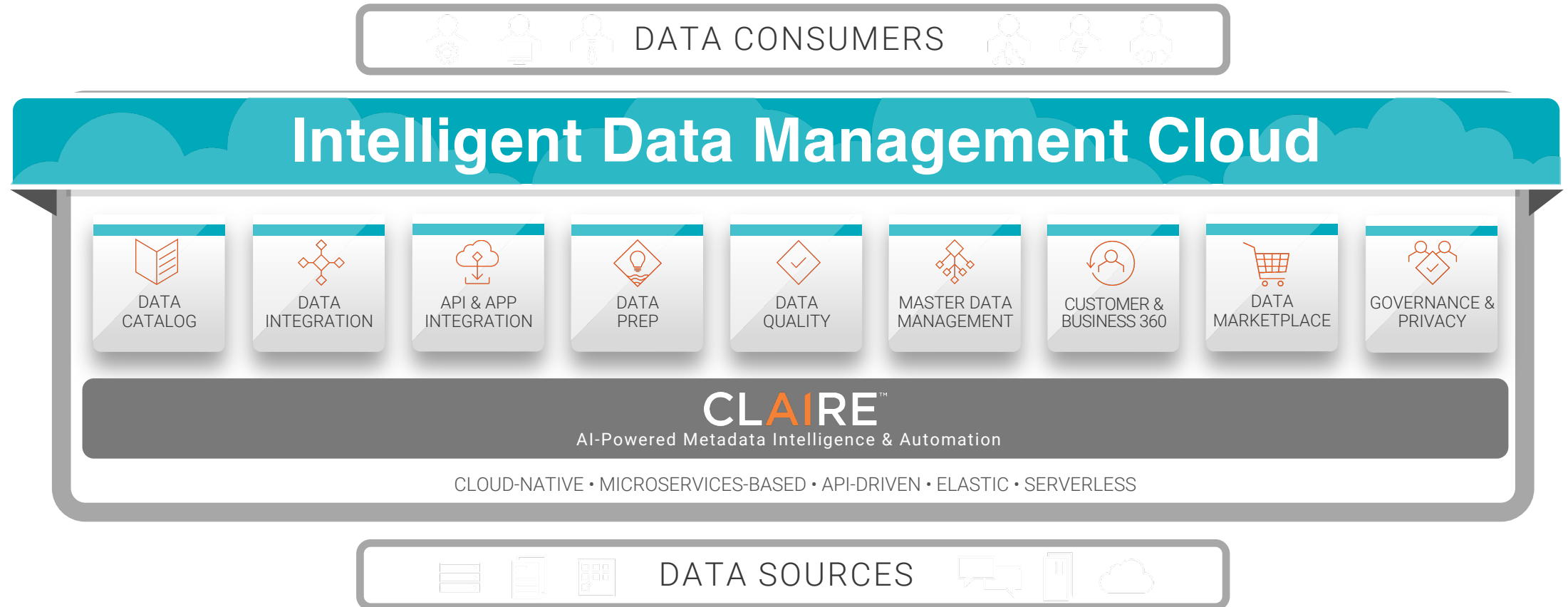
SaaS – Software as a Service is a cloud computing offering that provides users with access to a vendor's cloud-based software.

- Advantages of SaaS include:
 - Reduced time to benefit
 - Lower costs
 - Scalability and integration
 - New releases (upgrades)
 - Easy to use and perform proof-of-concepts



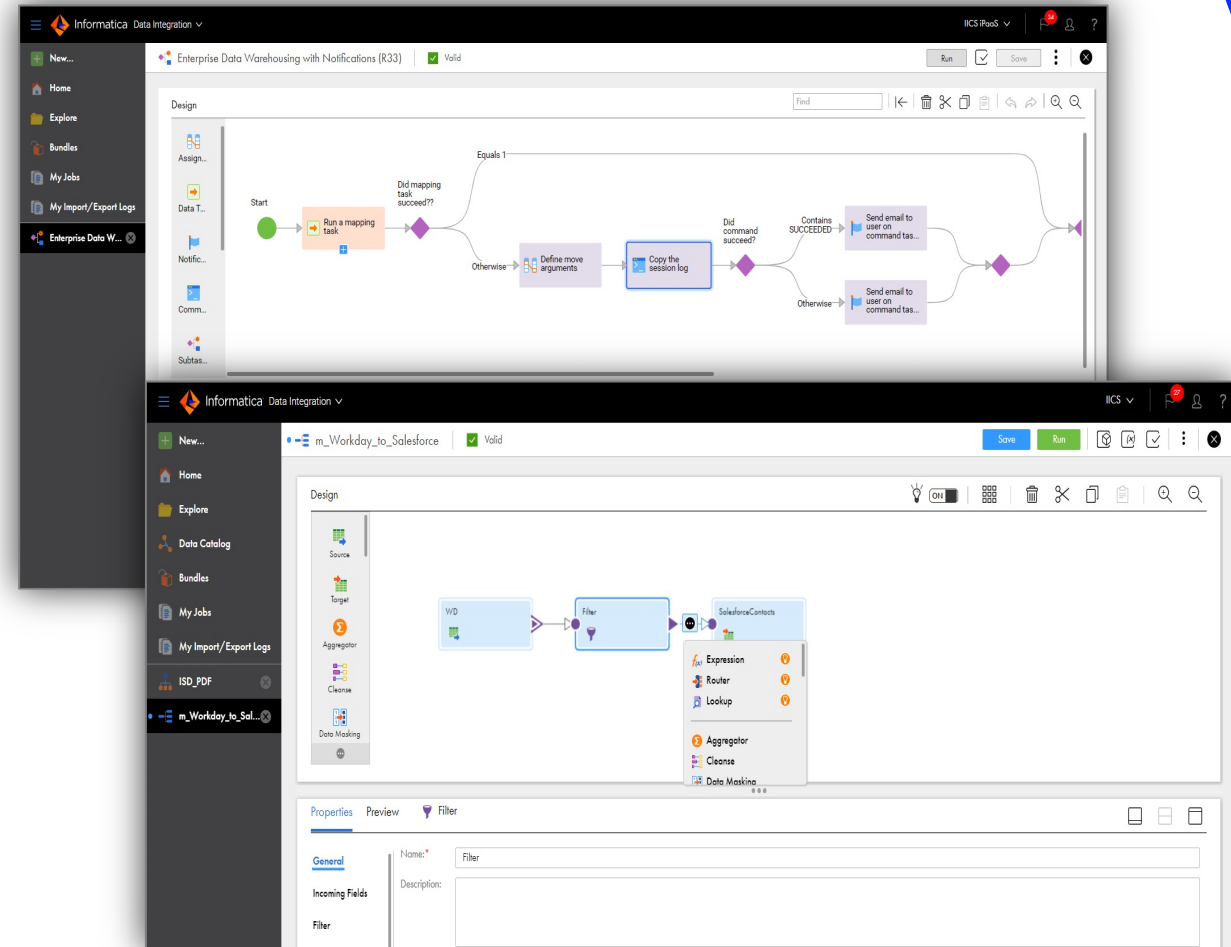
IDMC Platform

IDMC combines Informatica's 260+ intelligent cloud offerings



Cloud Data Integration

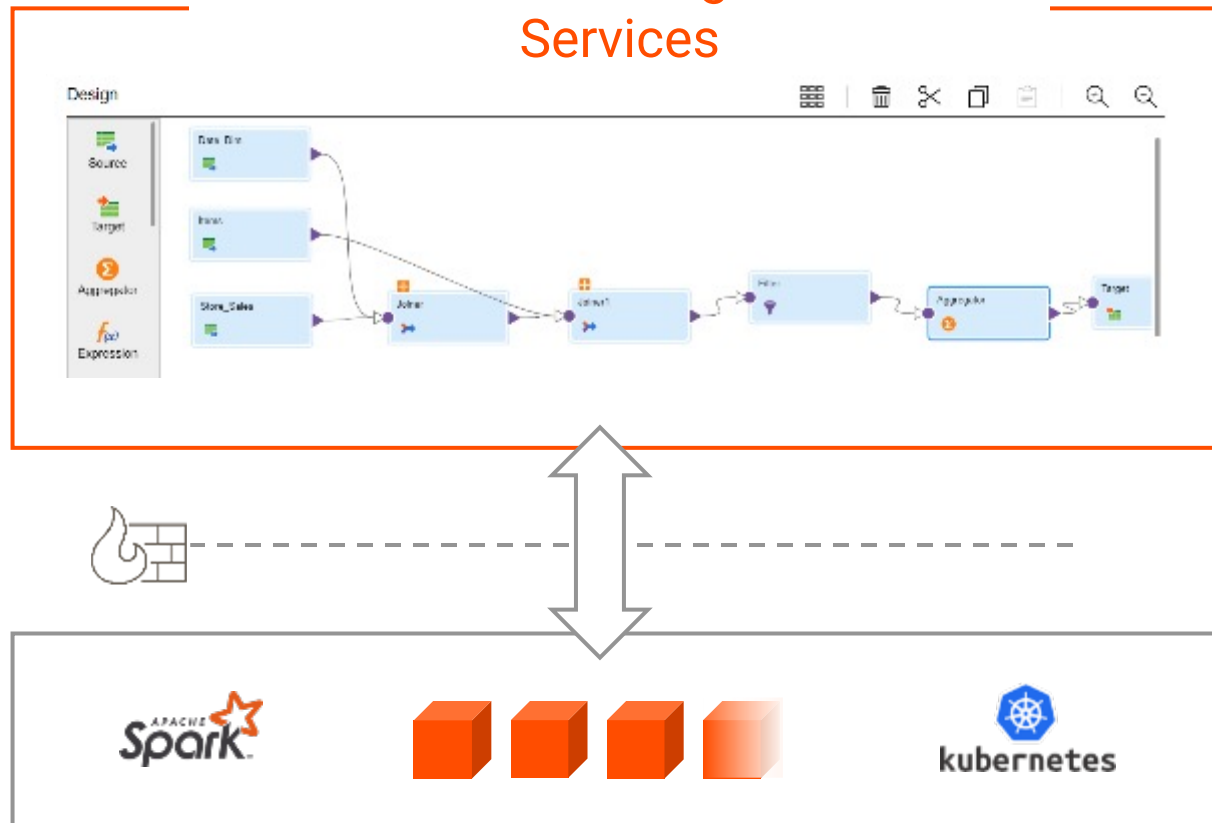
- Build simple to complex data integration loads using a mapping designer with out-of-the-box advanced data integration transformations.
- Connector support for any data type or any pattern (ETL or ELT)
- Support of Mass ingestion of any formats- files, databases, CDC or streaming
- Automatically discover any data type
- Intelligent transformation recommendation
- Serverless execution mode
- Auto tuning, auto scaling of DI jobs for greater performance & cost saving
- Heat map view of the jobs to identify critical times and peak hours for better resource planning.



CDI-Elastic

Enabling Spark serverless support for auto-scaling and provisioning

Informatica Intelligent Cloud Services



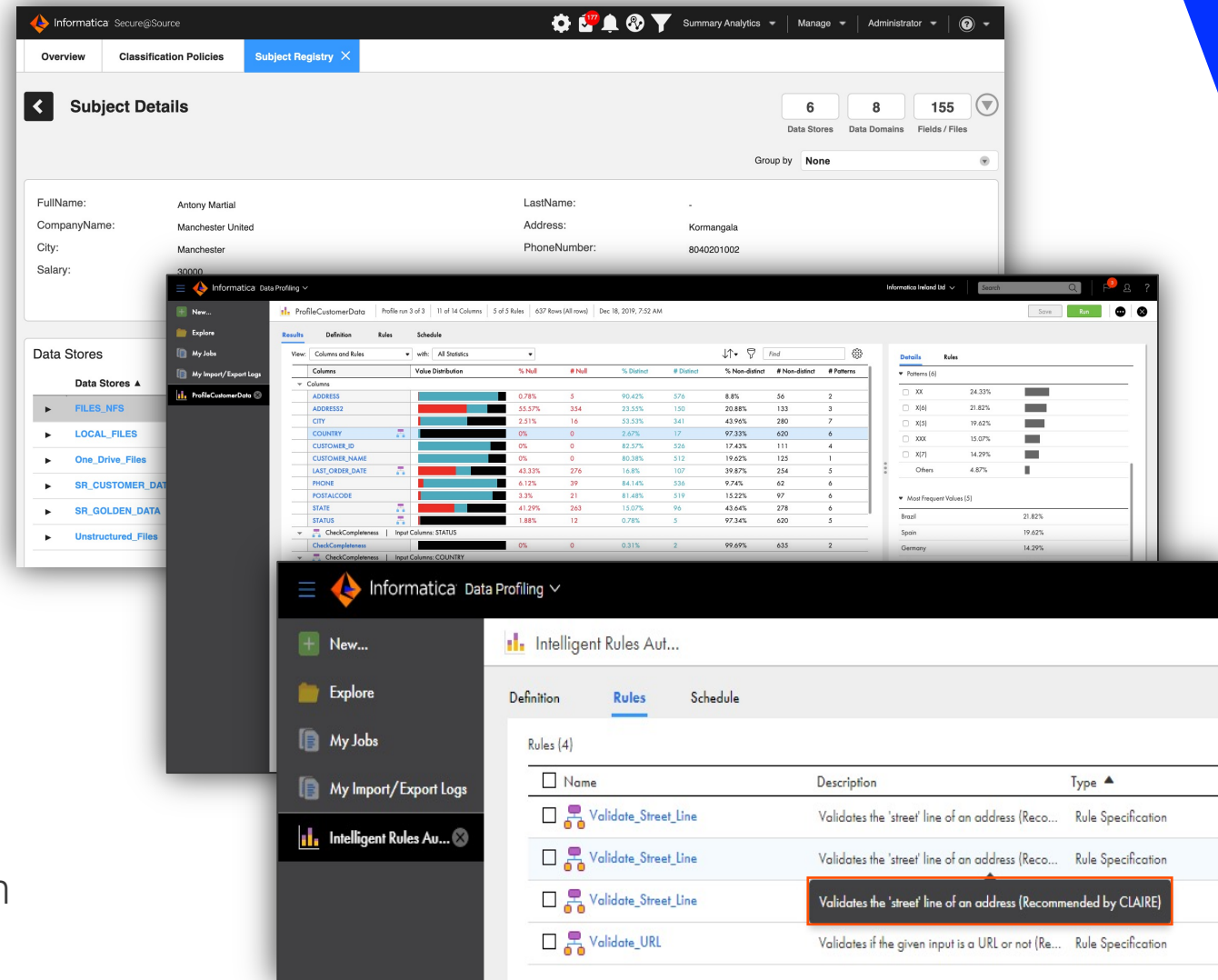
Same, familiar Informatica design-time

Serverless Spark cluster

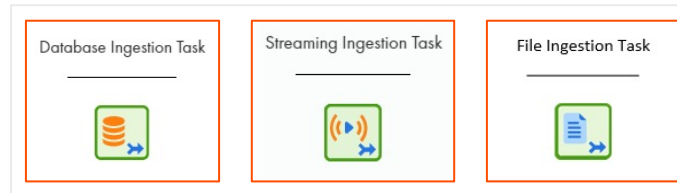
Deployed to your Cloud network

Cloud Data Quality

- Ensure trusted data for CDW/DL
- Empower self-service and business ownership
- Identify and prioritize data issues
- Intelligent discovery and classification of various domains including sensitive data, across structured and unstructured sources
- Intelligent rule recommendations
- Build once and re-use everywhere across cloud and on-premises
- Natural Language Processing (NLP) to auto generate data quality rules
- Automate data quality assessment and reporting across all sources
- Embed DQ processes with Cloud Data Integration



Cloud Mass Ingestion



DATABASE INGESTION

The screenshot displays the Informatica Data Integration console for a task named 'demo_dbms_msc2m_joinedload_1'. The task is in a 'Completed' state. The configuration window for the 'patient_data' source is open, showing the 'Source' tab. The 'Connection' is set to 'Oracle Staging DB - Patient Data' and the 'Schema' is 'PATIENT_STAGING'. The 'Table Selection Rules' section shows 'Include' rules for 'Total Tables' and 'CDC Scripts'. The 'Advanced' section shows the 'Restart Point for Incremental Load' set to 'Default'.

STREAMING INGESTION

The screenshot displays the Informatica Data Integration console for a task named 'Ingest_Kafka_to_Amazon_S3'. The task is in a 'Completed' state. The configuration window for the 'IngestionDemo' target is open, showing the 'Target' tab. The 'Connection' is set to 'Kafka' and the 'Topic' is 'DemoTopic1'. The 'Advanced Properties' section shows 'Producer Configuration Properties' set to 'key1=value1,key2=value2', 'Metadata Fetch Timeout in milliseconds' set to '5000', and 'Batch Flush Size in bytes' set to '1048576'.

FILE INGESTION

The screenshot displays the Informatica Data Integration console for a task named 'ADDSGET12_PatientFlow_json_2019'. The task is in a 'Completed' state. The configuration window for the 'FTP_to_S3' source is open, showing the 'Source' tab. The 'Connection' is set to 'Advanced FTP V2' and the 'Schema' is 'PATIENT_STAGING'. The 'Table Selection Rules' section shows 'Include' rules for 'Total Tables' and 'CDC Scripts'. The 'Advanced' section shows the 'Restart Point for Incremental Load' set to 'Default'.

Cloud Application Integration

Data

API Management



Expose APIs

- Create business, composite and data services
- Expose APIs to internal and external partners
- Make APIs discoverable
- Monitor business services
- Manage and control API usage
- Improve business, composite and data services

Events

Event-based Integration

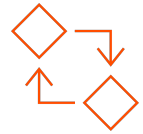


Ensure data consistency with API and event-driven application integration

- Integrate in real time with APIs, messaging and Pub/Sub
- Connectivity to a wide range of apps

Processes

Process Integration



Automate multistep processes

- Automate business processes that span applications on premises and in Cloud
- Automating user workflows with interactive access to data

Cloud Data Governance and Catalog



Single solution for data intelligence



Automated to save time on manual tasks



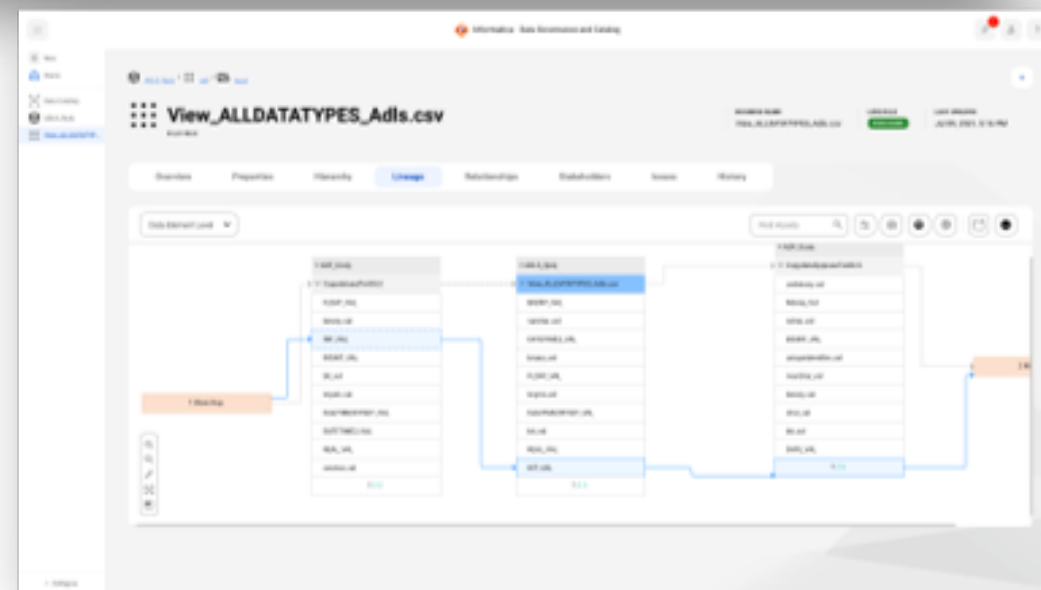
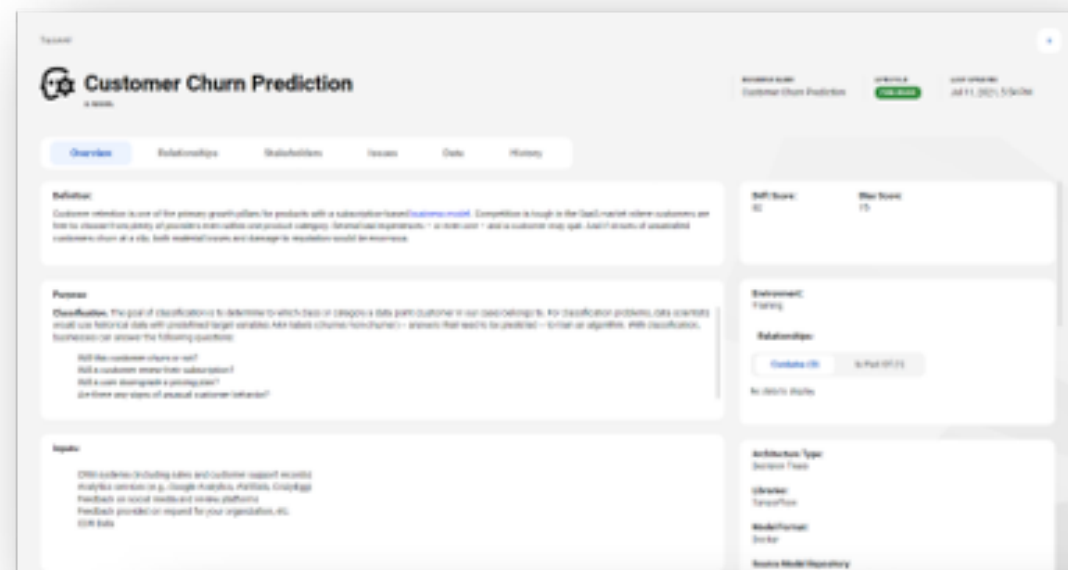
Start immediately with a cloud-native solution



Put accurate information at your team's fingertips

Platform - Highlights

- ✓ Centralized metadata knowledge platform delivered as SaaS
- ✓ Micro services-based architecture deployed on Managed Kubernetes Clusters
- ✓ Standards based API specifications
- ✓ Vendor neutrality
- ✓ Multitenancy
 - ✓ Tenant Level Compute Isolation
 - ✓ Tenant Level Storage Isolation
 - ✓ Tenant specific encryption keys
- ✓ Standardized source system connectivity
- ✓ Plugin driven scanner architecture
- ✓ Serverless Compute support
- ✓ Centralized Monitoring and Logging
- ✓ Embedded telemetry
- ✓ Canary based deployments



Customer 360 SaaS Overview

Why is it called Customer 360 SaaS?

SaaS – Software as a Service

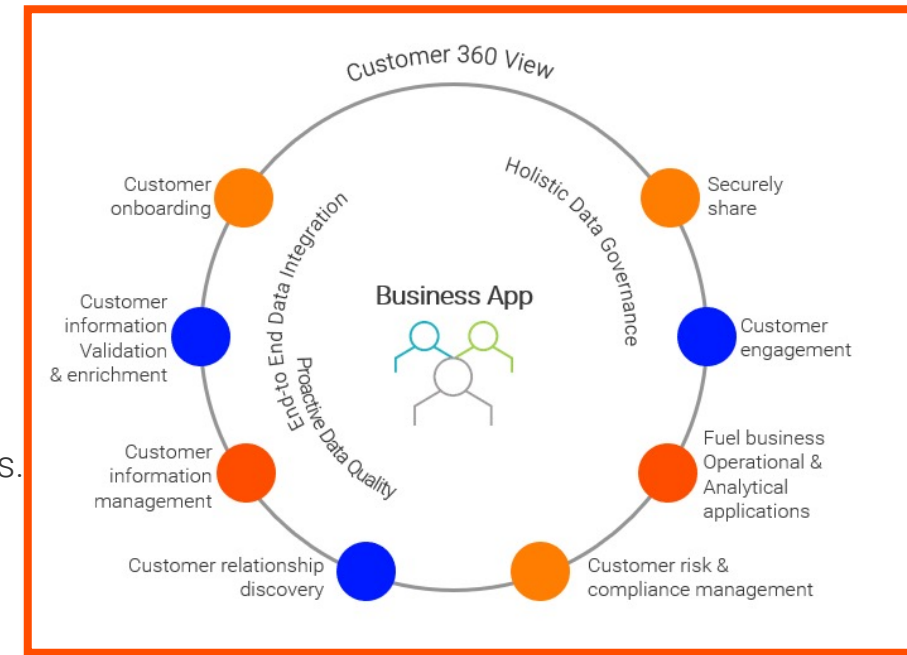
- SaaS advantages include accessibility, compatibility, and operational management.
- An easy-to-use, configurable, business-friendly user interface that makes it easy to explore, visualize, and steward master data in a secure and appropriate manner.
- Out-of-the-box user interfaces for rapid application configuration for any industry.
- Built-in smarts and orchestration with AI-driven data matching and smart fields.
- Embedded data integration at any latency with Informatica's best-in-class iPaaS capabilities.
- Flexible and modular microservices architecture for scalability and upgradeability.

Business 360 Reference Architecture

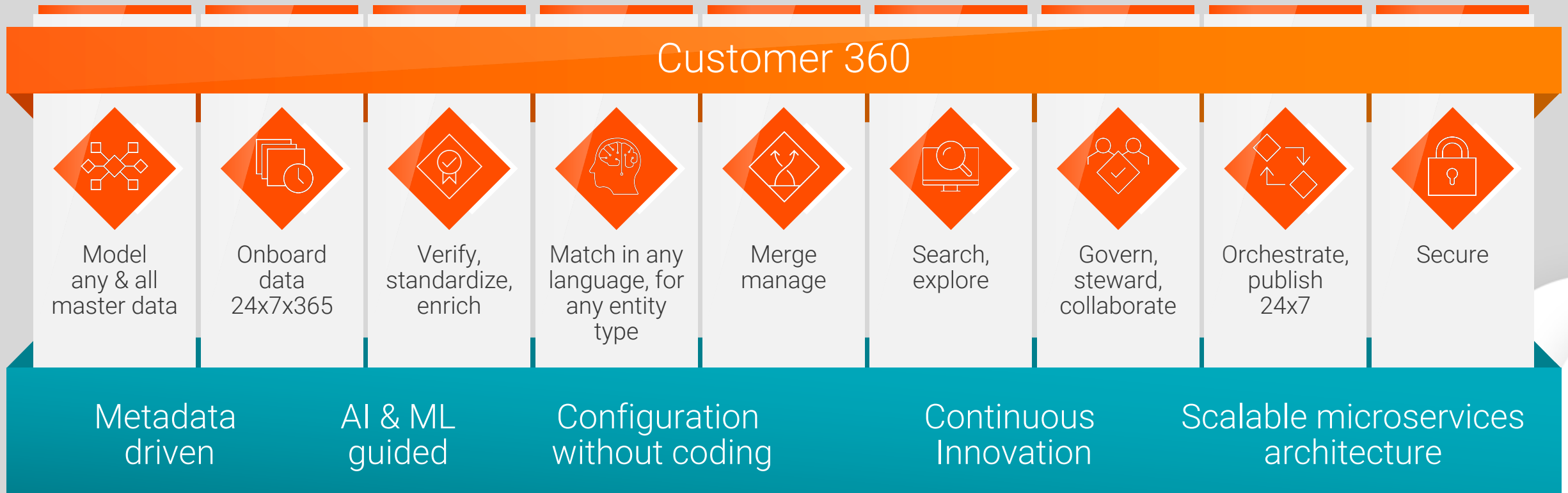


MDM Customer 360 SaaS

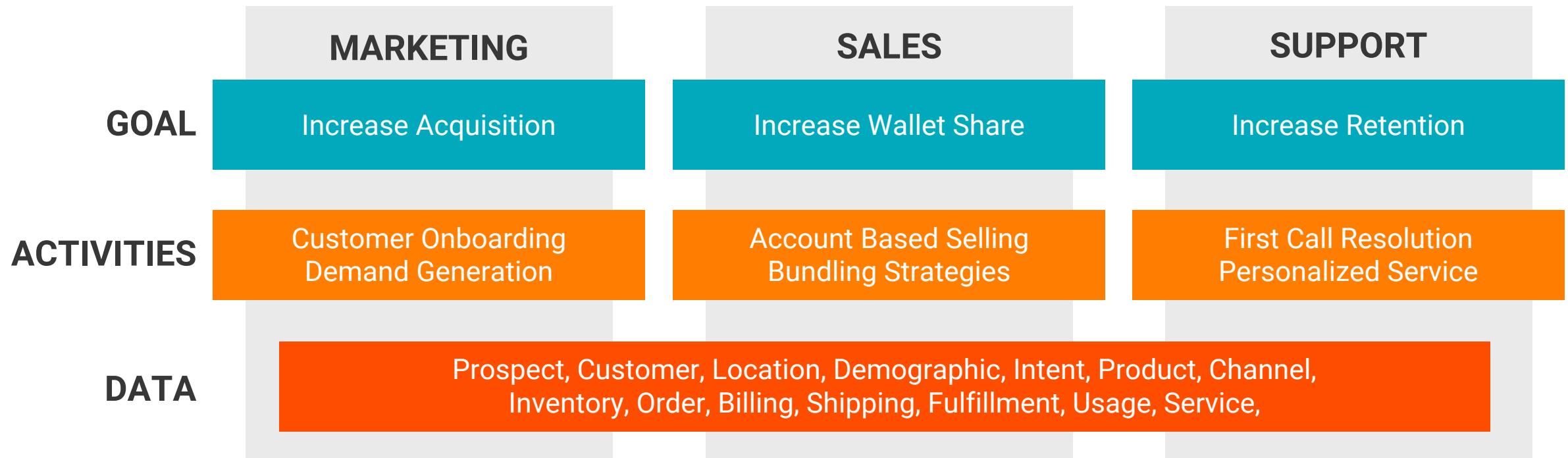
- Customer 360 is one of the microservices of Informatica Intelligent Cloud Services (IICS).
- Leveraging the flexibility and agility of cloud technologies, **Customer 360 SaaS delivers customer data that's trusted, complete, consistent, and governed.**
- An easy-to-use, configurable, business-friendly user interface that makes it easy to explore, visualize, and steward master data in a secure and appropriate manner.
- Out-of-the-box user interfaces for **rapid application configuration** for any industry.
- Built-in smarts and orchestration with **AI-driven data matching and smart fields.**
- Embedded data integration at any latency with Informatica's best-in-class iPaaS capabilities.
- Flexible and modular microservices architecture for **scalability** and **upgradeability.**
- Business managers use the master customer data to make better business decisions about customers and manage customer relationships.
- Streamline the **customer onboarding and qualification process.**
- **Centralize** the data about customers in a master database.
- View the relationships between customers, parent companies, subsidiaries, and related organizations.



The most complete cloud-native master data management platform that provides seamless connectivity, data integration, process orchestration, data quality, reference data management and master data management in a single solution



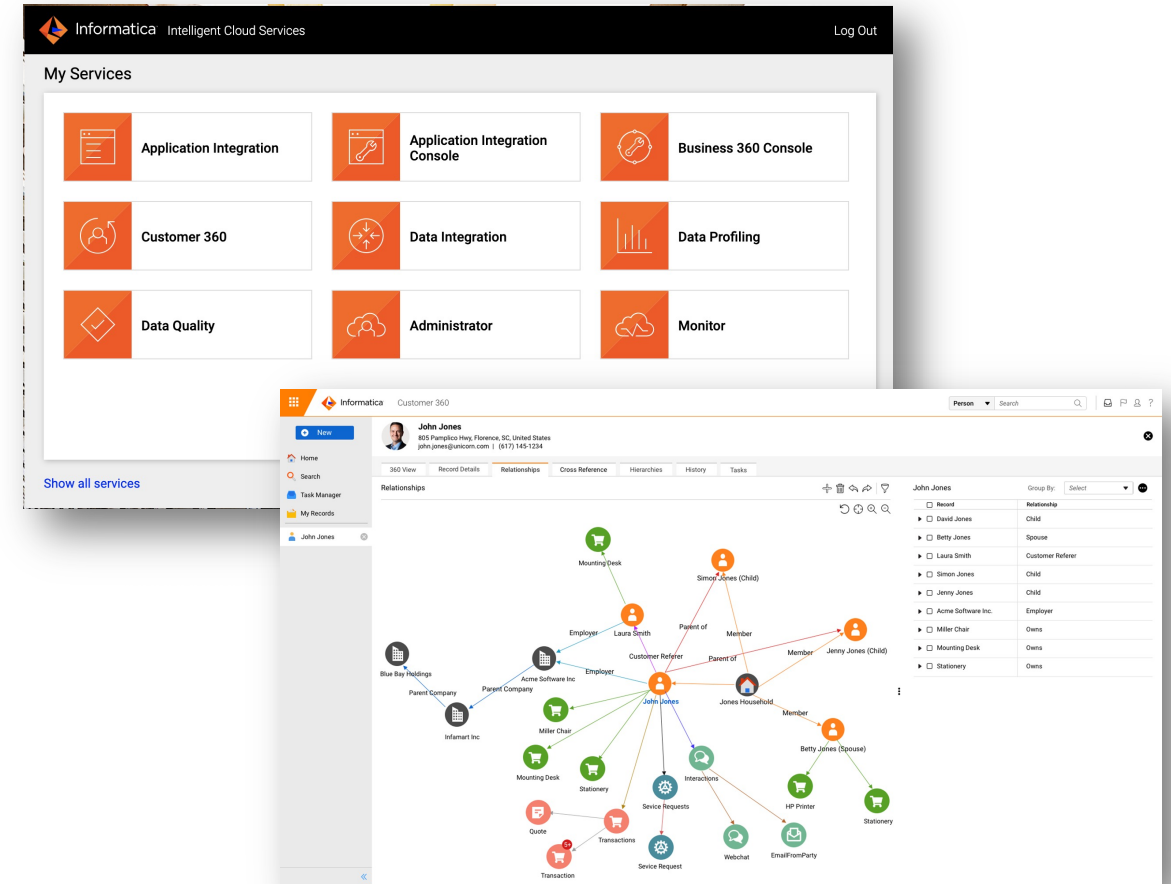
Business Purpose of a Customer 360



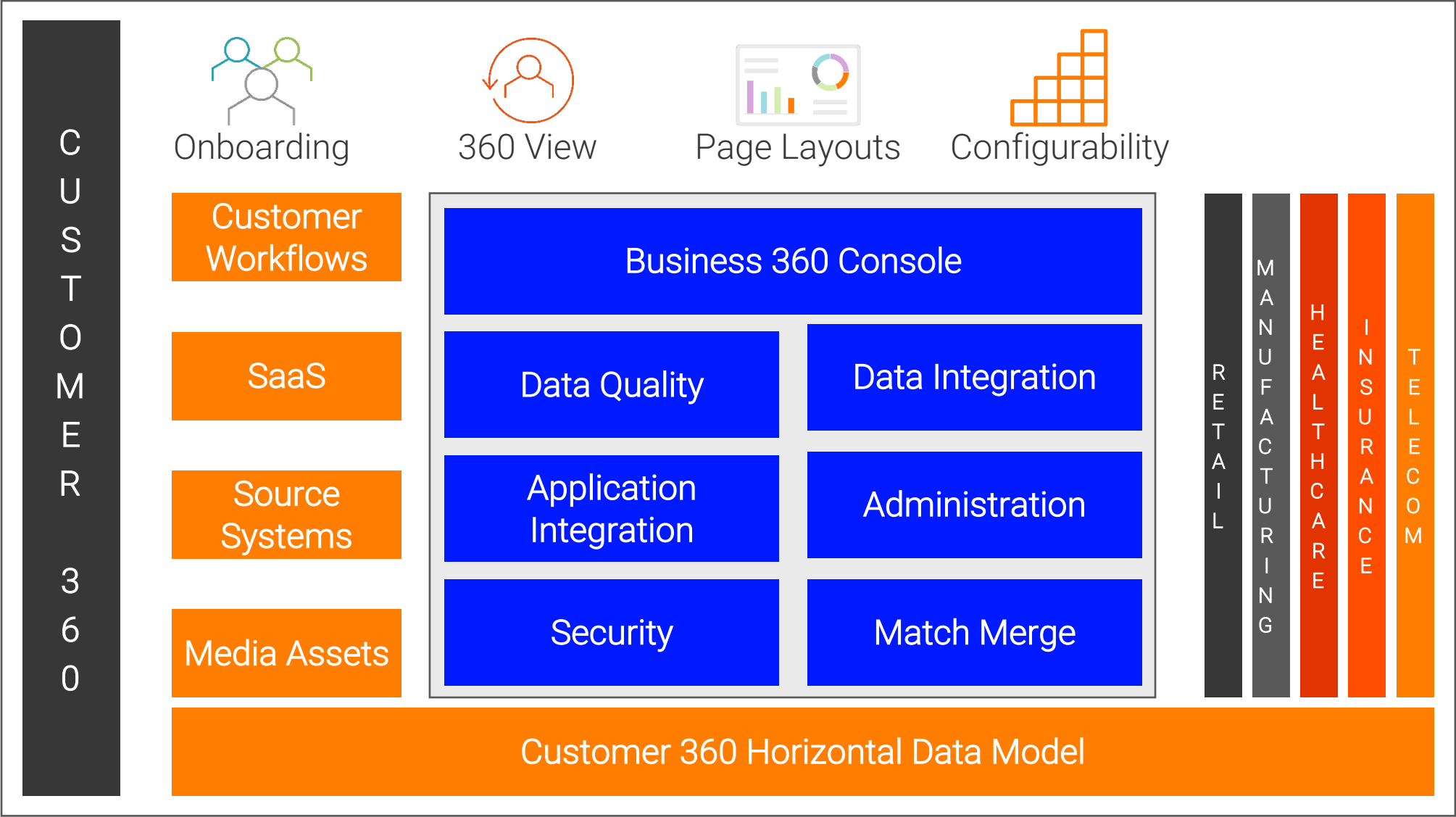
Customer 360 SaaS Features & Benefits

- Easy-to-use, configurable business-friendly user interface
- Self-service management of customer data for business users
- Built-in smarts and orchestration with AI driven data matching, smart fields and built-in orchestration
- Embedded Data Integration at any latency with Informatica's best-in-class iPaaS capabilities
- Flexible and modular microservices architecture for scalability and upgradeability

Transform customer experience, accelerate digital transformation, & modernize back-office applications



IICS Customer 360 Architecture



Customer 360 New and Improved Business UI

Flexibility, automation, intelligence, low TCO, scale, fast time to market

The screenshot displays the Informatica Customer 360 Business UI for a user named John Jones. The interface includes a sidebar with navigation options like Home, Search, Task Manager, and My Records. The main content area is divided into several sections: General Information, Addresses, Phone, Education, and Identifiers. A '360 View' tab is active, showing a comprehensive overview of the user's data. A 'Person' dropdown menu is visible at the top right, and a search bar is located next to it. The user's profile information is displayed at the top, including their name, address, and contact details. Below this, the 'General Information' section provides details about the user's birth date, birth place, classification, gender, title, marital status, and customer tier. The 'Addresses' section lists three addresses: Home, Work, and Work 2, each with a location pin and contact information. The 'Phone' section lists three phone numbers: Home, Work, and Work 2, each with a location pin and contact information. The 'Education' section lists three education levels: Masters, Bachelors, and High School, each with a location pin and contact information. The 'Identifiers' section is currently empty. On the right side of the interface, there is a 'Relationships' section showing a list of relationships with other users, including David Jones (Child Member), Betty Jones (Spouse Member), Simon Jones (Child Member), and Jenny Jones (Child Member). Below this, a 'Reporting Hierarchy' section shows a tree structure of the user's relationships, including Blue Bay Holdings, Acme Software Inc., and Infamart Inc. At the bottom right, a 'Consents' section lists various consent options, such as Analytics and Measurement, Targeting and Campaign, Third-party Data Sharing, Web Data, and Enrichment.

The screenshot displays the Informatica Customer 360 Business UI for a user named John Jones, focusing on the 'Relationships' section. The interface includes a sidebar with navigation options like Home, Search, Task Manager, and My Records. The main content area is dominated by a large network diagram showing John Jones at the center, connected to various entities and individuals. The network diagram includes nodes for Blue Bay Holdings, Acme Software Inc., Infamart Inc., Miller Chair, Mounting Desk, Stationery, Interactions, Service Requests, Webchat, EmailFromParty, HP Printer, and Stationery. The 'Relationships' section on the right lists various relationships, including David Jones (Child), Betty Jones (Spouse), Simon Jones (Child), Jenny Jones (Child), Acme Software Inc. (Employer), Miller Chair (Owns), Mounting Desk (Owns), and Stationery (Owns). The 'Consents' section at the bottom right lists various consent options, such as Analytics and Measurement, Targeting and Campaign, Third-party Data Sharing, Web Data, and Enrichment.

Onboard MongoDB datastore



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

Connection Details

Connection Name: * MDM Connector

Description:

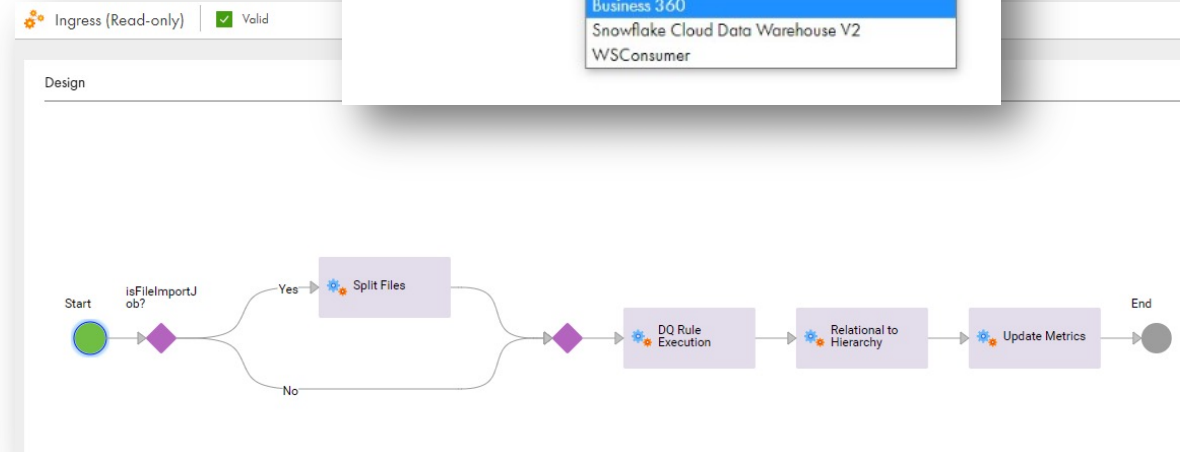
Type: * ? Business 360

Business 360 Properties ?

Runtime Environment: * ?

Connection Section

- Select...
- Salesforce
- Flat File
- FTP/SFTP
- MS Access
- Microsoft Dynamics CRM
- MySQL
- ODBC
- Oracle
- SAP
- SQL Server
- Web Service
- Amazon Redshift v2
- Amazon S3 v2
- Cloud Integration Hub
- Business 360**
- Snowflake Cloud Data Warehouse V2
- WSCConsumer



Customer 360 MongoDB & Elasticsearch Data

MDM Cloud SaaS Data Security

- Data At Rest
 - AES 256-bit encryption
 - MongoDB and Elasticsearch
- Data In Transit
 - Utilizes TLS v1.2 or greater protocol
- Tenants are isolated from other Tenants
- Informatica has centralized key management system (KMS)
 - Managed by Informatica and not a key management provider/clients/customer
 - Encryption keys must have a stated life and be rotated before that life expires
 - Change frequency is based each class of key
- Generated in a manner consistent with key management industry standards
 - Asymmetric encryption key length a minimum of 2048 bits
 - Symmetric encryption use AES with a key length of at least 128 bits is used

Verify, Standardize, Enrich



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

Person Valid

Model Data Flow Consumption

Attributes Data Quality Match Survivorship Events

All Attributes

Basic Fields

Text

123 Integer

100 Double

First Name * Middle Name Last Name * Full Name

Address Status Phone Tax Details

Alternate Names Email

Properties: Phone

General

Data Quality

Survivorship

DaaS

☒ Enable DaaS Validation

Validation Type

☐ Batch ☒ Real-time

Error Severity Information

Error Message * Invalid Phone Number

Downgrade Trust Score (%) 100

Full Name Concatenation

Definition Configuration

Design

PersonFullName

- firstName
- lastName
- middleName

Properties: PersonFullName

General

Rule logic definition

	Input	Operator	Condition	Action
if	firstName	is not	NULL	then Merge(firstName)
if	Result of # 1	is not	NULL	then Merge(PREVIOUS)
if	Result of # 2	is not	NULL	then REMOVE_MULTIPLE
or			No rule statement is valid	then Do Nothing

Match



NAME3 matching
(i.e. Declarative
Rules only) for GA



Automerge rules,
manual merge
rules or threshold
based rules

Edit Declarative Rule

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

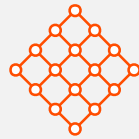
Save

Cancel

Merge, Manage



Cell-level
survivorship



Decay and source
ranking rules for
GA



Survivorship
inheritance to
make it easier to
configure



Automerge vs.
manual review
rule configuration

Informatica Customer 360

John Jones
805 Pamplico Hwy, Florence, SC, United States
john.jones@unicom.com | (617) 145-1234

360 View | Record Details | Relationships | Cross Reference | Hierarchies | History | Tasks

Cross Reference Records

John Jones	John Jones Source: Salesforce	John J Jones Source: SAP	John Jones Source: Social Media Twitter	John Jones Source: Web Chat
Match Explanation	24	24	24	20
System Fields Last Update: 09/15/2020				
Display Name: John Jones	John Jones	John Jones	Johnny Jones	John Jones
First Name: John	John	John	Johnny	John
Middle Name: J.	J.	J.	J.	
Last Name: Jones	Janes	Jones	Jones	Jones
Credentials: MBBS	MD	MBBS	Doctor	MBBS
Gender: Male	Male	Male	Male	Male
Date of Birth: October 20th 1970	October 20th 1970	October 20th 1970	October 20th 1970	December 20th 1979
Place of Birth: Canada	China	Canada	Canada	China
LinkedIn URL: .../in/John_Jones	.../in/John_Jones	.../in/John_Jones	.../in/John_Jones	.../in/John_Jones
KOL Indicator: 55	52	51	55	55
Target Indicator: 222	222	222	222	222
Status: Active	Active	Active	Active	Inactive
Address (5)				
Address Type: Home	Home	Office	N/A	Office
Address Line 1: 805 Pamplico Hwy	805 Pamplico Hwy	99 Erritos Ln	N/A	998 Gordon Ave
City: Florence	Florence	Jersey City	N/A	Jersey City
State: SC	SC	New Jersey	N/A	New Jersey

Search, Explore



Elastic Search



Search across
multiple Business
Entities at once



Configurable
search results
layout



Save searches
and save filtered
searches as
templates

The screenshot displays the Informatica Search interface. At the top, there is a search bar with a magnifying glass icon and a 'New Filtered Search' button. Below the search bar, the interface is divided into two main sections: 'Templates (2)' and 'Searches (1)'. The 'Templates' section lists two templates: 'Ontario Organizations' and 'Company Type Filter', both with 'Attributes:' listed below them. The 'Searches' section lists one search: 'Multinational Companies', also with 'Attributes:' listed below it. Below these sections, there is a 'Person' category. A dropdown menu is open, showing 'Multiple' as the selected option, with a search bar and a magnifying glass icon. The dropdown menu also shows 'Organization' and 'Person' as options, both with checkboxes. Below the dropdown, the 'Search Results: John (2)' section is visible, showing a result for 'John Thomas' with his designation 'Director, Product Management' and address '120 Bremner Blvd, Toronto, ON, Canada'.

Search

New Filtered Search

Templates (2)

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

Searches (1)

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

Multiple *

☒ Organization

☒ Person

Search Results: John (2)

☐ John Thomas

Designation: Director, Product Management

Address: 120 Bremner Blvd, Toronto, ON, Canada

Govern, Steward, Collaborate



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@abco.com

360 View Record Details Hierarchies Network History Matches Tasks Cross reference

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

Jane Smith < 1 of 3 > Find

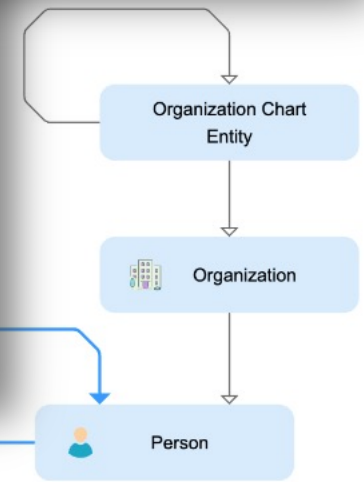
	Title	Location
▼ Informatica		
▼ Sales		
▼ Jane Smith	VP	RWC
▼ Sambit Das	Dir.	BAN
▼ Antony Blake	Asst. Dir.	RWC
▼ Jake Brown	Dir.	RWC
▼ John Cook	Asst. Dir.	RWC
▼ Deborah Seth	Sr. Mgr.	TOR
▼ Micheal Turner	Sr. Mgr.	STU
▼ Marketing		
▼ Jane Smith	VP	RWC
▼ Sambit Das	Dir.	BAN
▼ Antony Blake	Asst. Dir.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

Group by: None Find

Record	Relationship
<input type="checkbox"/> Sambit Das	VP manages Dir
<input type="checkbox"/> Jake Brown	VP manages Dir
<input type="checkbox"/> Deborah Seth	VP manages Sr. Mgr.
<input type="checkbox"/> Micheal Turner	VP manages Sr. Mgr.

1-4 of 4 < 1 of 1 > Items per page 5



Orchestrate, Publish



All data flows
orchestrated by
CAI



Extract data in
batch with Data
Integration &
MDM Connector

The screenshot displays the Informatica Data Integration (DII) interface. The top navigation bar includes the Informatica logo, 'Data Integration', and user information. The left sidebar contains navigation links: 'New...', 'Home', 'Explore', 'Bundles', 'My Jobs', 'My Import/Export Logs', and 'Organization-Read'. The main workspace is divided into two panes. The top pane, titled 'Design', shows a workflow diagram with a 'Source' connector, a 'Target' connector, and a 'MDM' connector. The bottom pane, titled 'Properties', shows the 'Field Mapping' tab for the 'MDM' connector. It displays a table of 'Response Structure' elements and a table of 'Output Fields'.

Response Structure (151 of 151 mapped)

Element Name	Cardinality
Organization	0-1
name	0-1
numberOfEmployees	0-1
companyType	0-1
dateOfIncorporation	0-1
stateOfIncorporation	0-1
countryOfIncorporation	0-1
imageUrl	0-1

Output Fields

Field Name	Actions	Mapped Field
root		/root
PK_root		system generated
sourceSystem		/hype/sourceSystem
sourcePKKey		/hype/sourcePKKey
name		/hype/Organization/name
numberOfEmployees		/hype/Organization/numberOfEmployees
companyType		/hype/Organization/companyType
dateOfIncorporation		/hype/Organization/dateOfIncorporation

Secure



Roles, groups & users managed in IICS



Role-based access control



Industry certifications, standards & assessments



Organization

Licenses

SAML Setup

Settings

Users

User Groups

User Roles

Runtime Environments

Connections

Add-On Connectors

Schedules

Add-On Bundles

Swagger Files

Logs

manager1

Define the user account settings, including group and role assignments.

User Information

First Name: new

Last Name: new

Job Title: sse

Phone Number: 1111111111

Email: vtuwani@informatica.com

Description: aa

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	Group Name	Description
No data to display		

Organization

Licenses

SAML Setup

Settings

Users

User Groups

User Roles

Runtime Environments

Connections

Add-On Connectors

Schedules

Add-On Bundles

Swagger Files

Logs

User Roles

Select the role you want to modify or define a new role.

User Roles (23)

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, 9:46 AM	Enabled	
Application Integration Business ...	Jul 12, 2020, 11:25 PM	Enabled	Role used for business managers
Application Integration Data Vie...	Jul 12, 2020, 11:25 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, 11:26 PM	Enabled	Role to preview data
Data Integration Task Executor	Jul 12, 2020, 11:28 PM	Enabled	Role to run Data Integration tasks
Deployer	Jul 12, 2020, 11:28 PM	Enabled	Role used by deployer
Designer	Jul 12, 2020, 11:28 PM	Enabled	Role for creating assets, tasks, and processes. Can configure connections, schedules, and runtime environments. Has access to...
MDM Business User	Jul 12, 2020, 11:27 PM	Enabled	Role used for MDM C360 Business Application runtime.
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 execution environments



*Thank
you*