



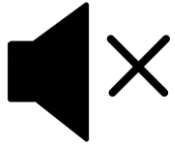
Jan 18, 2024

Integrating MDM SaaS with Cloud Application Integration (CAI)

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- 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.

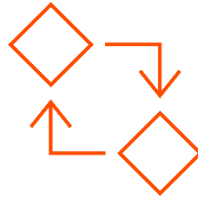
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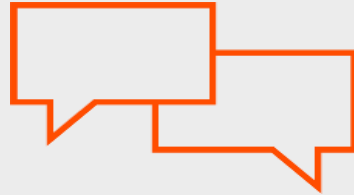
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More Information



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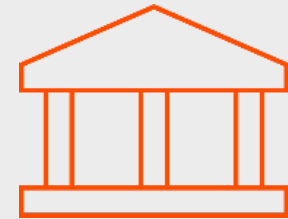
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Integrating MDM SaaS with Cloud Application Integration (CAI)



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Agenda

1 CAI in MDM SaaS - Overview

2 Extending Workflow Capabilities

3 Utilizing MDM APIs in CAI

4 Questions?

CAI in MDM SaaS – Overview

Processes in MDM SaaS

OOTB Processes

- Process Managed by Informatica and **internal purpose only**
- Used for SaaS MDM batch flow orchestration
- Updated as part of monthly releases
- Status should be “Valid” and “Published”

Custom Processes

- Can be created to extend MDM SaaS capabilities
- Designer is used to create custom processes
- Can be deployed on Process Server or Cloud Server
- Existing providers and consumers can be used, and system services can be leveraged

CAI in MDM SaaS – Overview

Events in MDM SaaS

Define business events on business entity records, such as create, update, delete, and merge

User-Triggered events

- To control approvals of create, update, delete, unmerge and manual merge
- On create or update a business entity record or hierarchy record
- A Custom CAI process instance can be triggered.
- Can be configured as a Required or Optional to invoke a process

System-Generated events

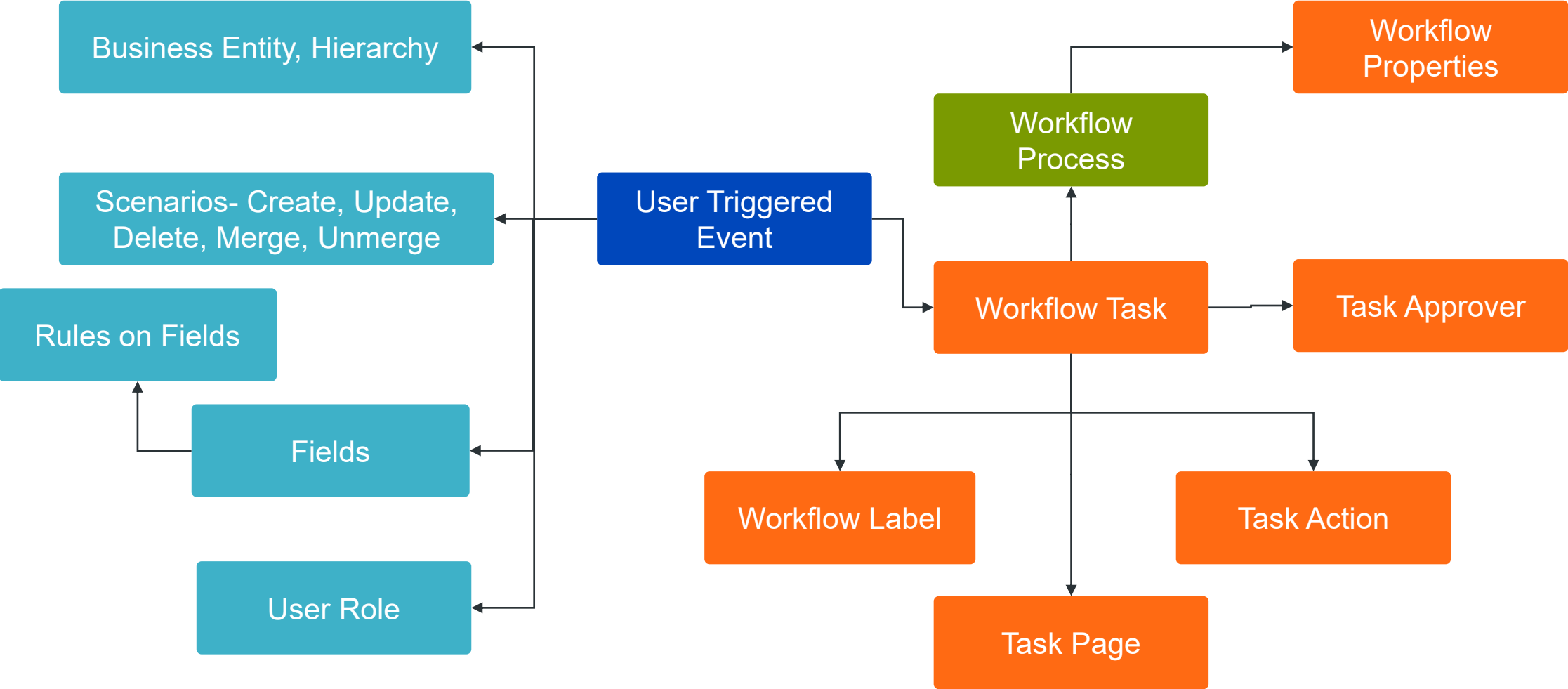
- Potential manual matches that require review
- Created by system for all manual matches defined in match model.
- Note that tasks are created on system generated event records 100 at a time per business entity
- At this point a Custom CAI process instance **cannot** be triggered.

Publishing events

- Publishing to external target.
- Published events need to be consumed via Business360 events connector

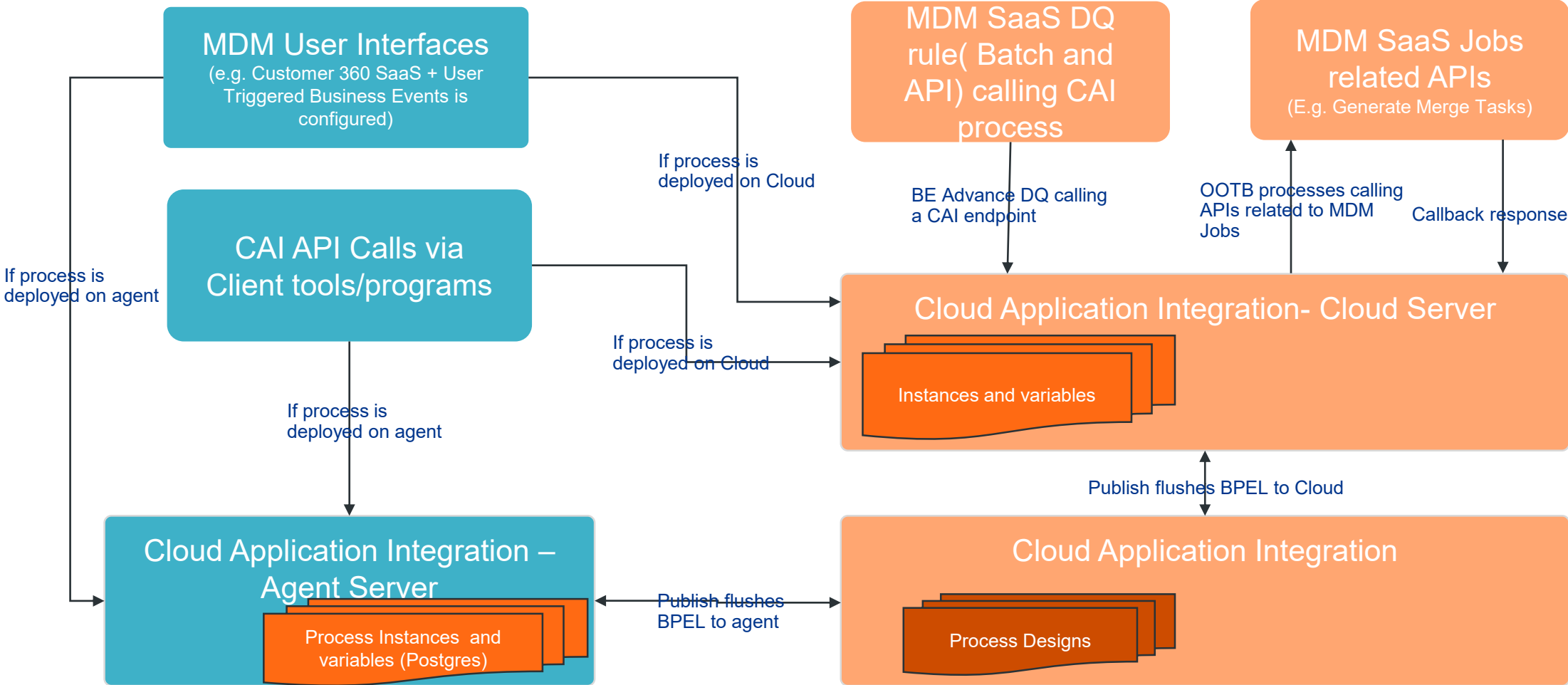
CAI in MDM SaaS – Overview

More about User-Triggered Event configuration



CAI in MDM SaaS – Overview

Control Flow



Extending Workflow Capabilities

1 Email notification as part of Task

2 Custom Validation – Basic Rule

3 Custom Validation – Advanced

4 Dynamic Task Assignment based on Real time Data

5 Draft Capability

6 Invoking Screen (Guide)- as button for robust customization scope

Input for a Custom Workflow

- Three Fields are mandatory input for a Custom Task
- "Input" field holds the "ChangeListID" which has the latest Payload of the record.
- Each Task will always have a changeListID
- "template" & "taskTypes" fields are the fields which you define the Task Metadata.

Start Properties ☐ ☐ ☐

General

Start Fields Whole Payload

[Input Fields](#) +

Input Fields (3)

Name	Type	Description	Required
input	Text		<input checked="" type="checkbox"/>
template	Template		<input checked="" type="checkbox"/>
taskTypes	Task Types		<input checked="" type="checkbox"/>

Output Fields

Temp Fields

Messages

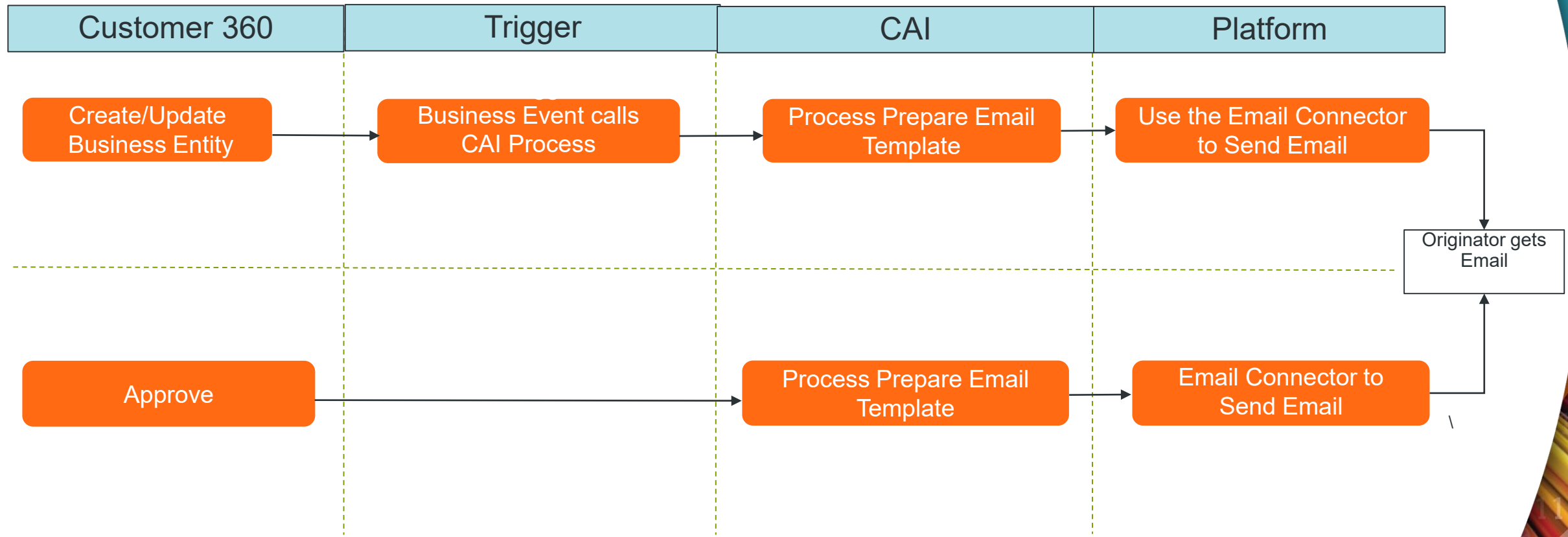
Advanced

Notes

```
input + hta:input  
hta:param : 6598332a90234456526cbda3
```

Email notification as part of Task

Using native CAI feature (Email connector) from MDM SaaS



Email notification as part of Task

- This can be achieved by Custom Workflow for Review Tasks.
- Emails Can be Sent to Task Originator and the Approver upon their action.
- Notification email can be sent on each step to Every Person who worked on that human Task.
- Task can include just the generic message and/or the Change Data.
- Task Can include the Decision what the approver made on that Task.

A Task Has Been Created

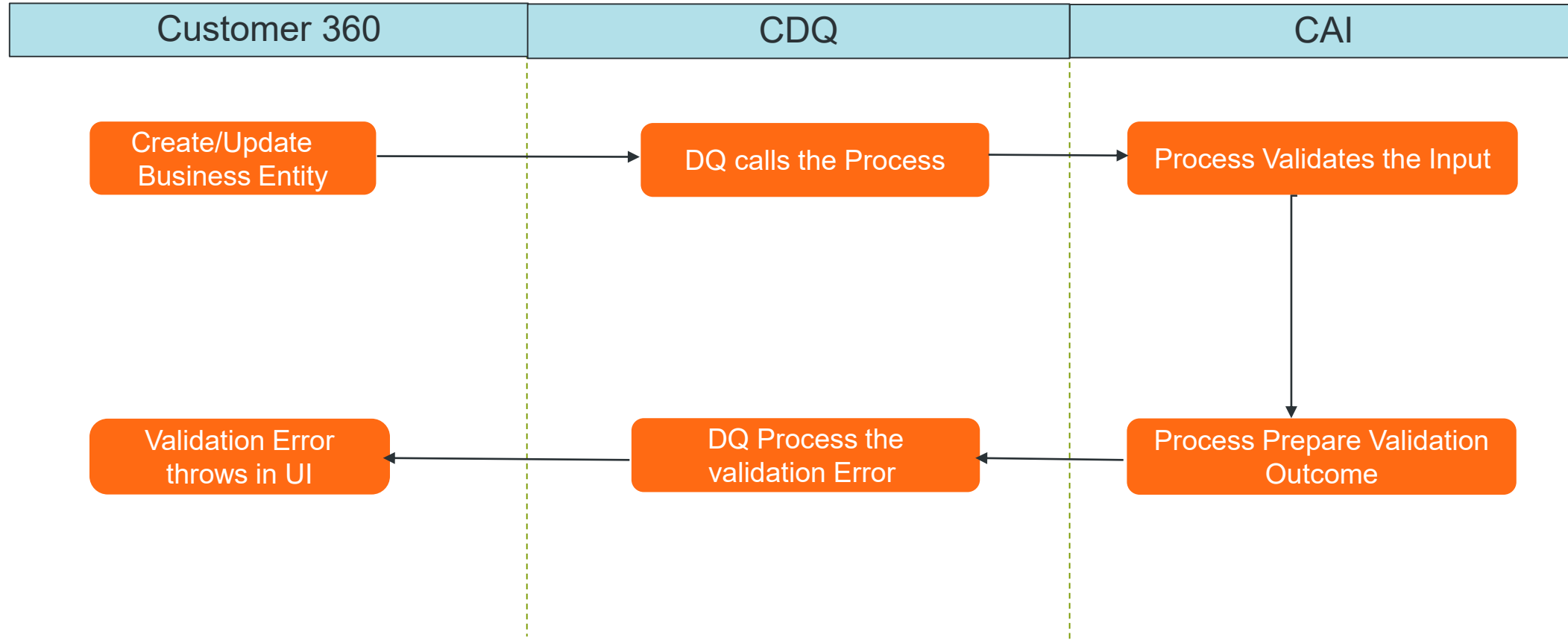
 
To  Chatterjee, Debanjan
Retention Policy Exchange online 3 Years delete (3 years)

Caution: This email originated from outside of the organization. Review for Phishing!

A task has been created : Task with name Debanjan C and change list657255388fedd01915fea807 is created

Custom Validation – Basic Rule

Calling Custom Process for Basic Validation in C360 UI



Custom Validation – Basic Rule

- A process can be called as part of the Basic rule and get it validated and show Error in the UI while creating or updating a record in the UI
- Currently a process is limited to only have the data for the same field group it does not have the way to access different field group or root Data.

General

Enable rule association

Applied Field: Address.Address Line 1

Name*

Internal ID CheckAddress_1702452599366

Description

Condition **Validation**

Configure a condition to transform or validate the field values.

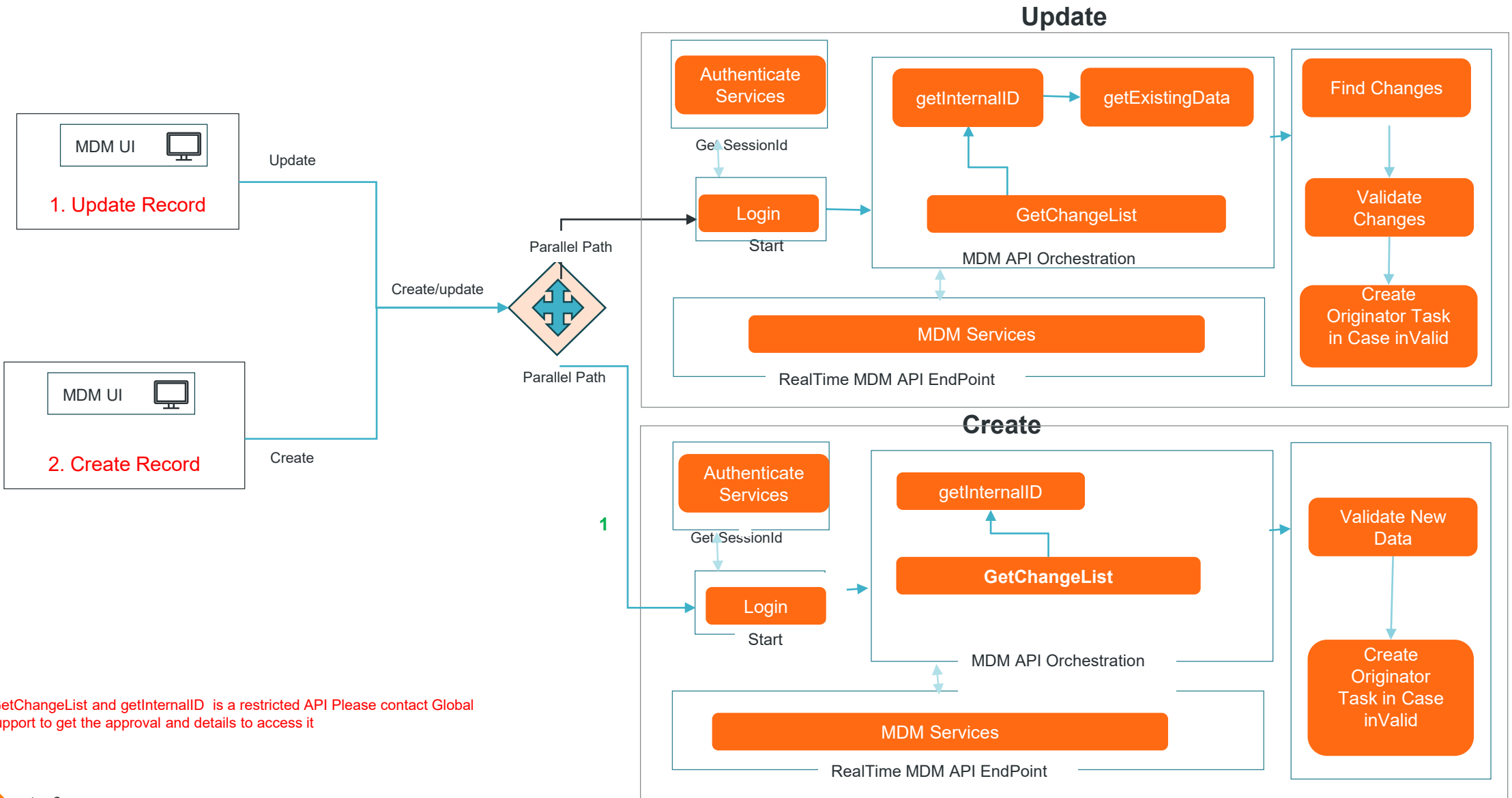
Function*

Description Validates the field data based on external validation process.

Process URL*

Input 1*

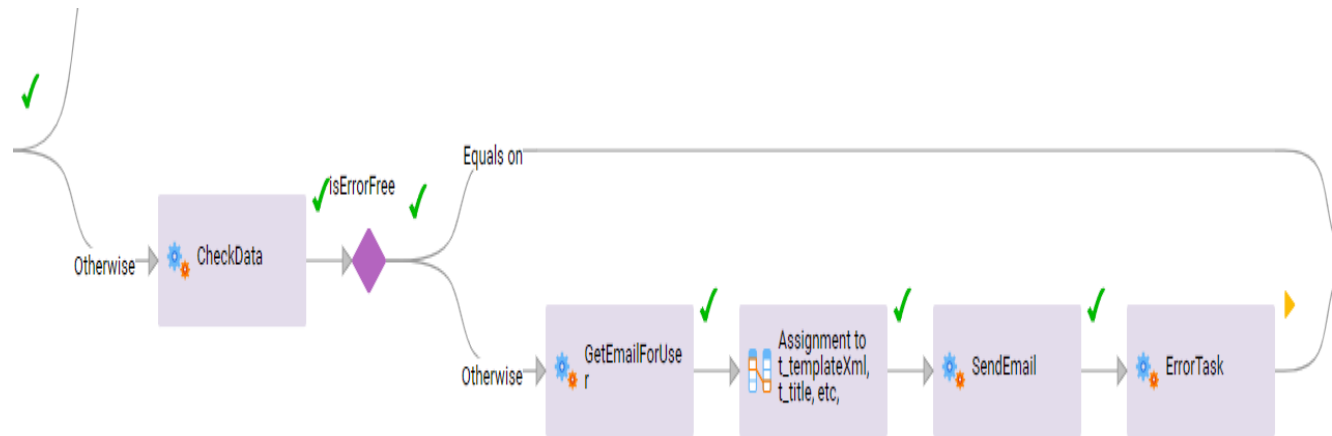
Custom Validation – Advanced




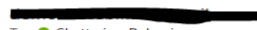
*GetChangeList and getInternalID is a restricted API Please contact Global Support to get the approval and details to access it

Custom Validation – Advanced

- Whole payload can be accessed using Change List API (Restricted).
- We can do calculation based on whole payload in CAI and if validation fails can create a Task to correct the data and send it back to the Originator.
- We also can get an email to originator on what to fix.



The Record you created is not Valid

 To 
Retention Policy Exchange online 3 Years delete (3 years)
Start your reply all with: [Resubmitted. Thank you.](#) [Here is the screenshot.](#) [Will do, thank you.](#) [Feedback](#)

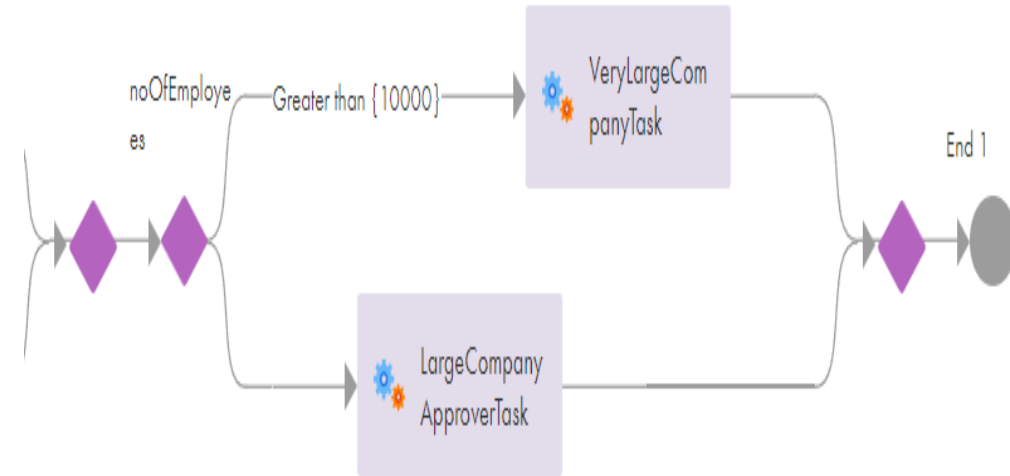
Caution: This email originated from outside of the organization. Review for Phishing!

Please Resolve the following errors and submit again: None of the address is Default

Dynamic Task Assignment based on Real time Data

Decide TaskType in Runtime

- Whole payload can be accessed using Change List API (Explained the slide before).
- Based on Data which is created or updated we can decide the type of Human Task it should go.
- In Business Event different Group can be assigned logically to be the potential owner of different human task configured based on data.



Eg: In this flow if the NumberOfEmployees are more than 10000 then the set of Approvers are different

Draft Capability

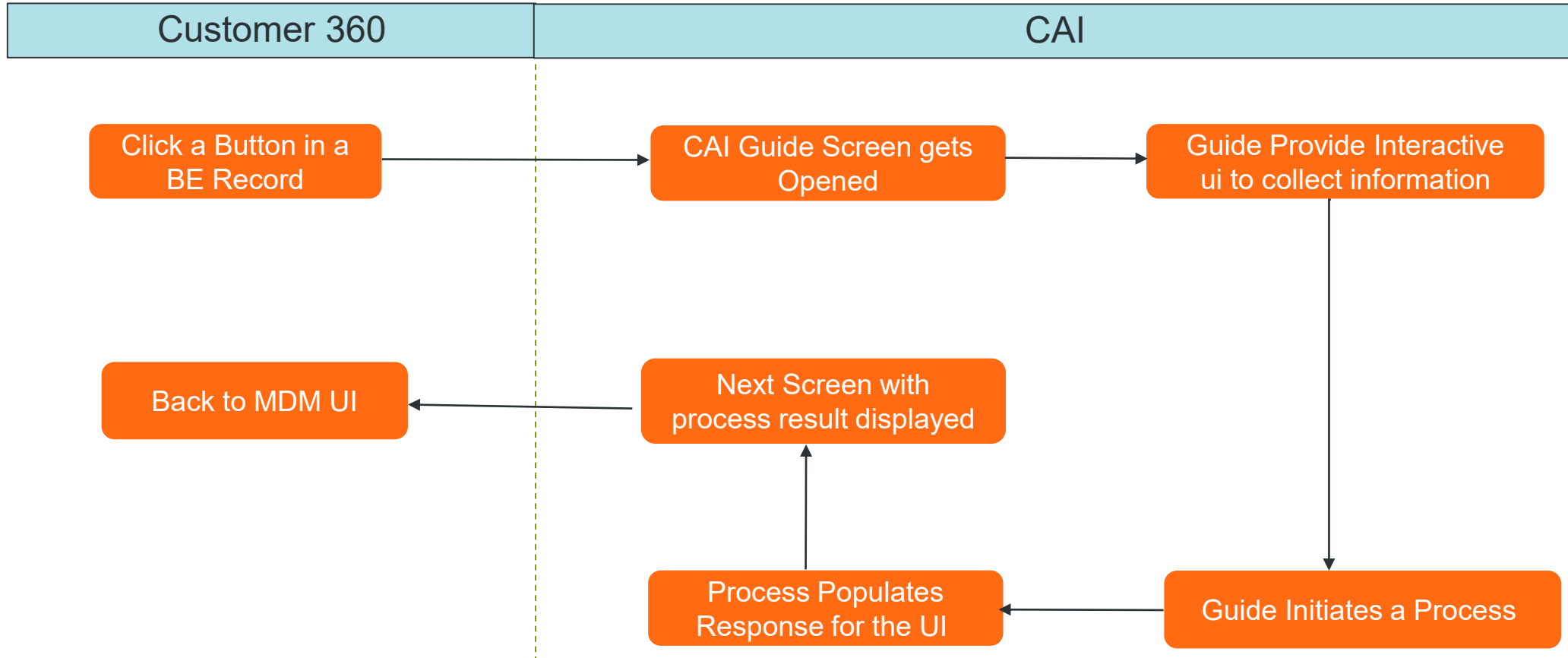
Saving a record as Draft

- A Custom Draft Checkbox is created.
- When we have that enable Custom Workflow can read that and can create a Task of Type Draft Task and Assigned to Originator
- It will go with the normal flow when the Record is submitted with the Draft indicator disabled.

Open Tasks (4)

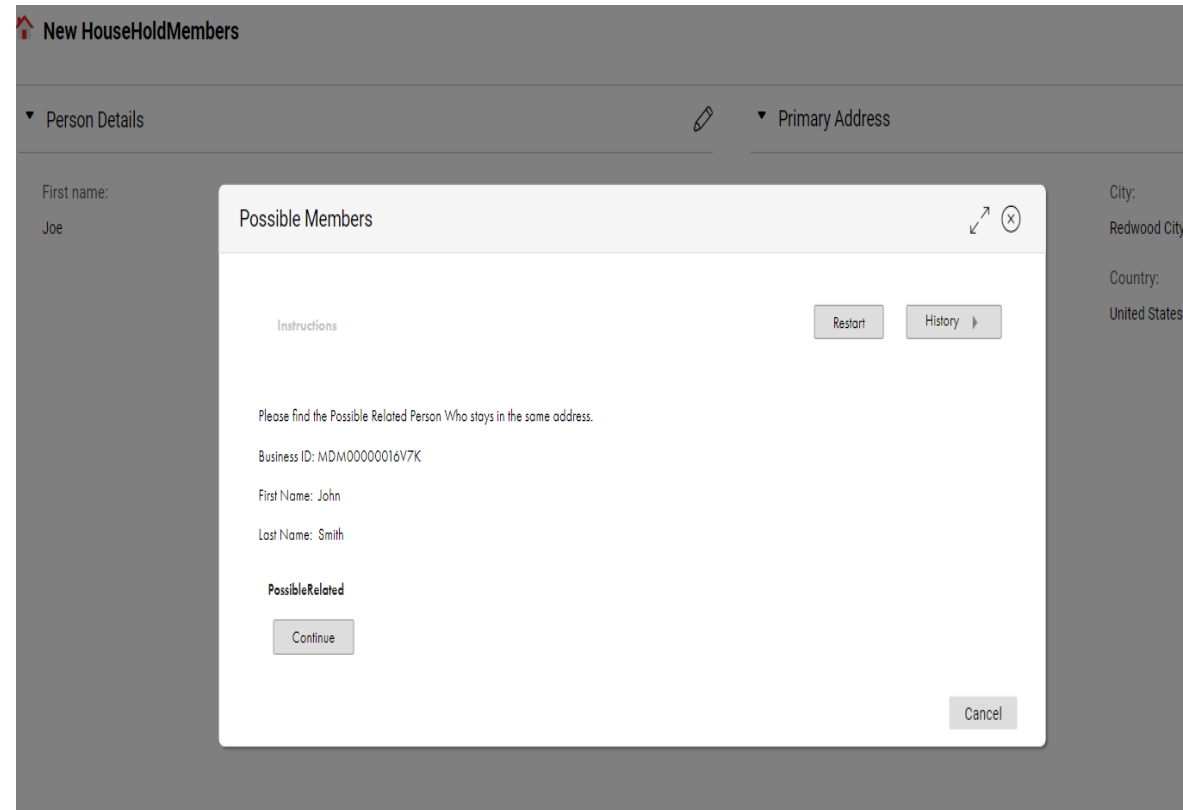
Task ID	Title	Task	Priority	Status
919901...	A Organization CreateTask has been created	DraftTask	Medium	Assigned

Invoking Screen (Guide)- as button for robust customization scope



Invoking Screen (Guide)- as button for robust customization scope

- A Custom button can be configured
- On click on the button it can show a CAI Guide, which can be customized for different purpose.
- As this is an extension of UI as part of the CAI process all the CAI Process capabilities are available there so these screen can be orchestrated by CAI Process and can do custom actions communicating with your backend process.

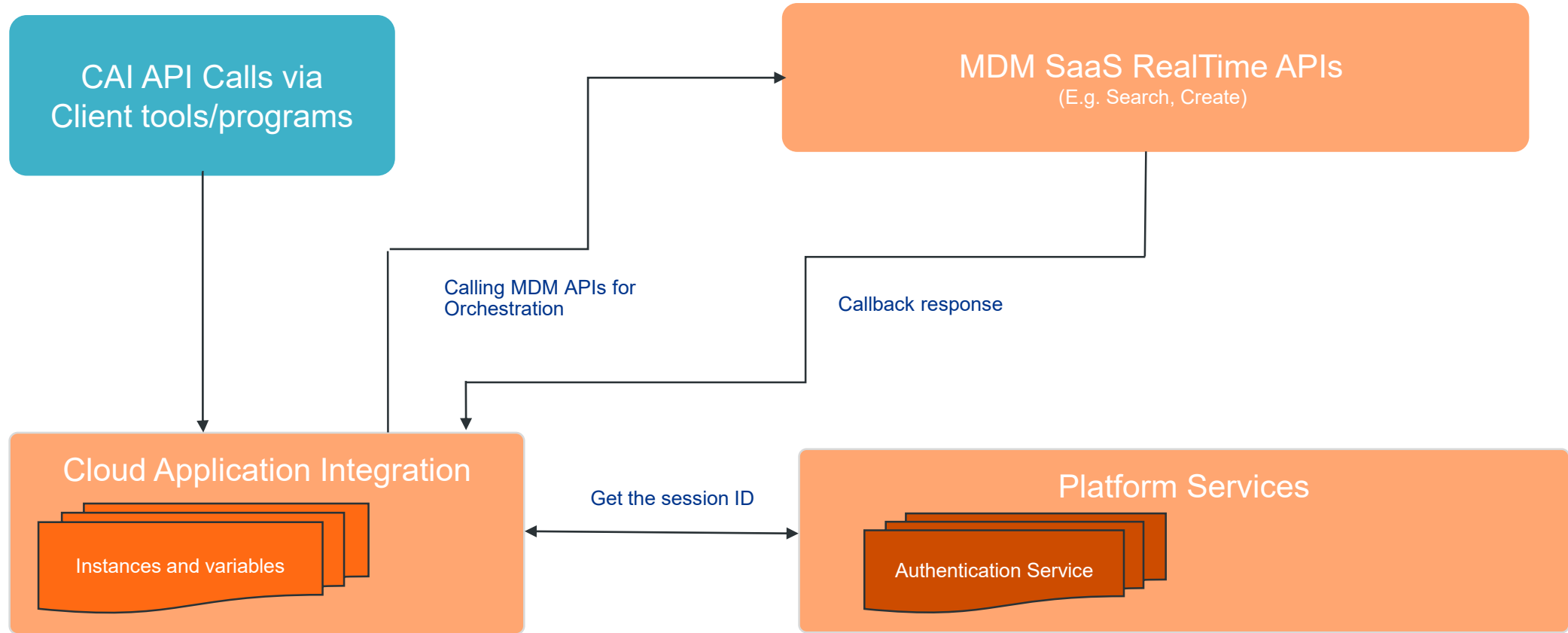


Utilizing MDM APIs in CAI

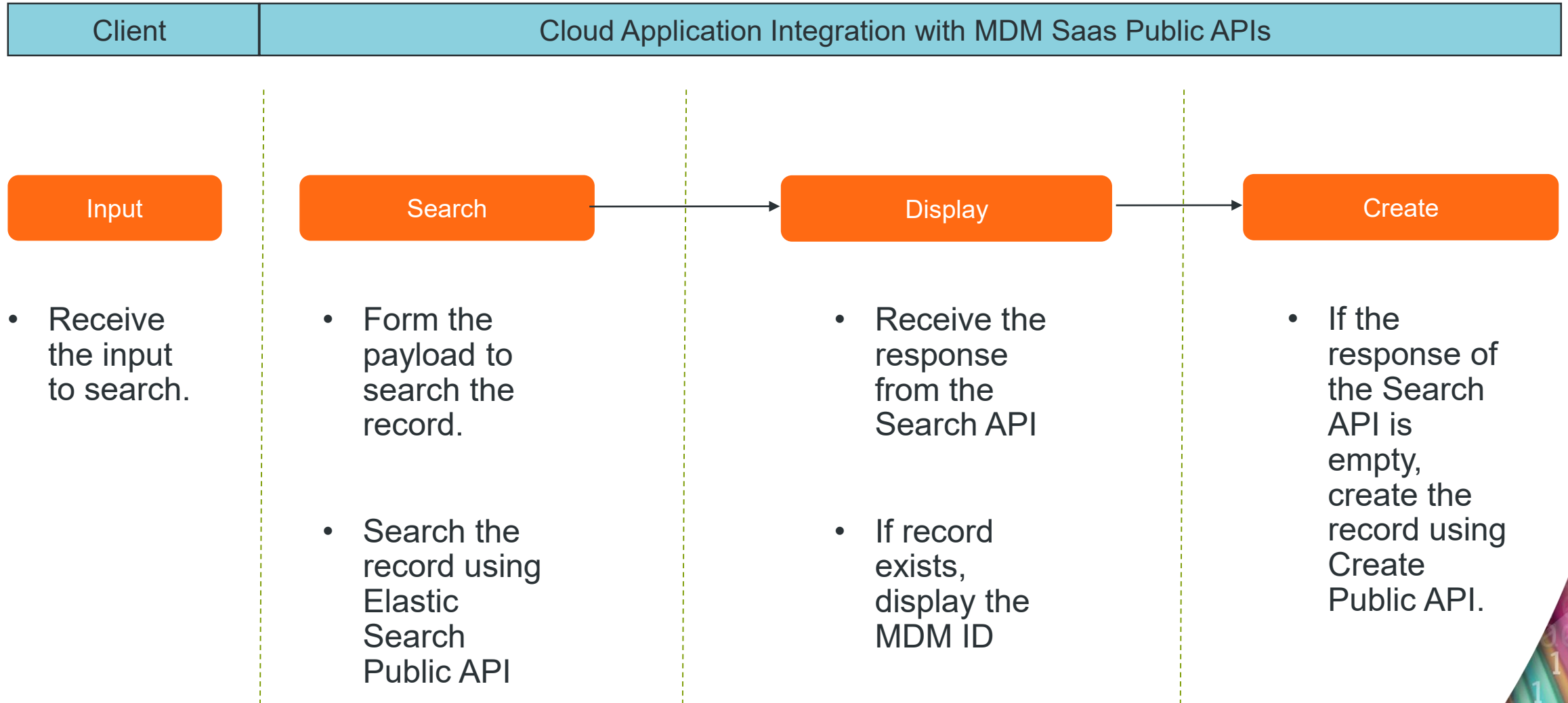
1 Search Before Create

2 Serialized Invocation of Jobs.

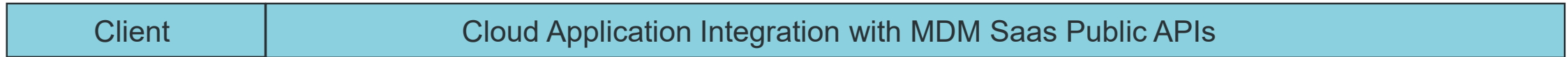
Orchestration of MDM APIs in CAI



Search Before Create

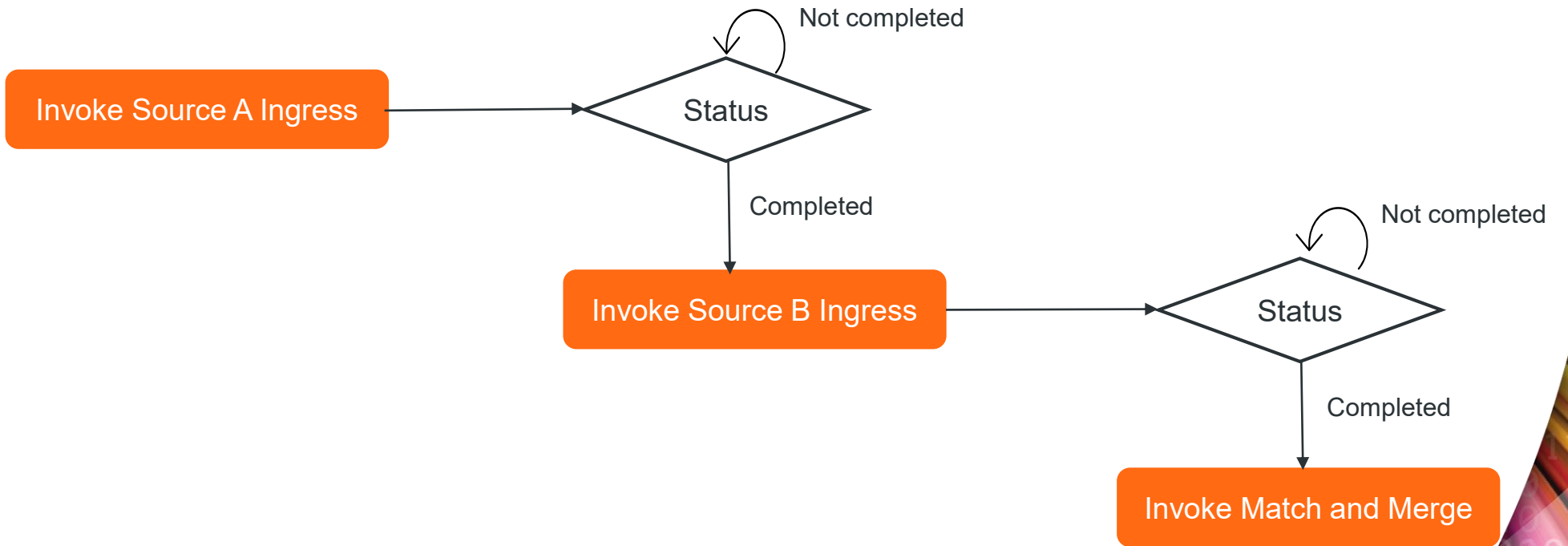


Serialized Invocation of Jobs



Input

Receive the internal ids of all the three jobs.



Points to be Noted

- The Examples shown in the demo is not the exhaustive list of what can be done using Custom CAI Workflow but an Idea how the Customization can be used to Serve different MDM Use Cases.
- "GetChangeList" and "getInternalID" API are not public APIs. Undocumented APIs are subjected to change without notice. please contact Informatica Global Support with your business use case before you plan to use them.
- At this point Custom UI Widget to support CAI Page Enrichments Via Popup and new browser window is a toggled Feature. Please contact Informatica Global Support if you want to enable.
- Using CAI process will result in IPU usage.

Questions?



Thank You

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