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MDM Modernization: Insights for Transitioning from On-Prem to SaaS Solutions

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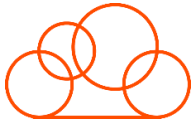
Housekeeping Tips

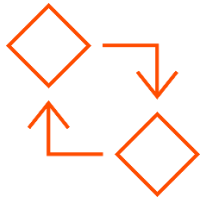
- Today's Webinar is scheduled for 1 hour
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via 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

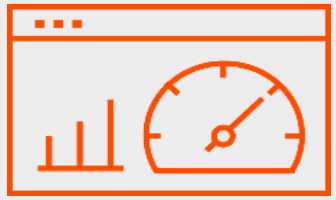


Product Learning Paths and Weekly Expert Sessions

Informatica Concierge

Tailored training and content recommendations

More Information



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Agenda

- Reason for modernization
- Prep-work needed for modernization journey
- Different approaches in modernization
- Differences and benefits of modernization
- Modernization Tool
  - Best practices and what it offers.
  - Demo
- Data Migration approach

Why Modernize?

MDM SaaS: Best of Breed with cloud-native products

Cloud-Native Architecture

Flexible, secure and modular microservices architecture

All-in-One Platform

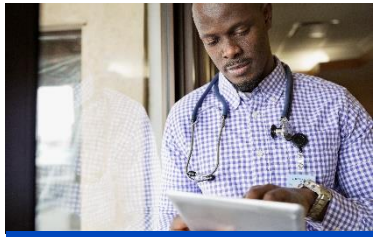
The only solution with every data management service in a single cloud

AI-Powered Capabilities

Artificial intelligence and machine learning built-in for ease of use

Privacy & Security

An advanced security posture to meet customer and regulatory needs



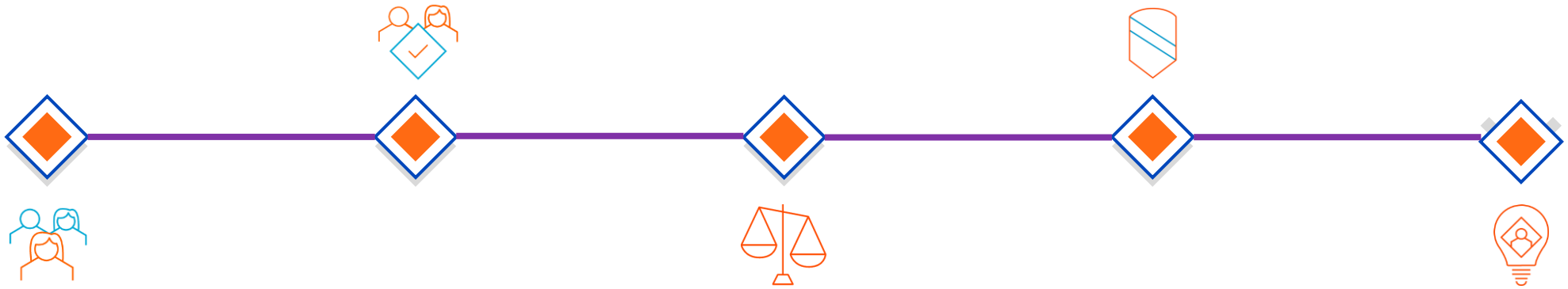
Ease of Maintenance

Rich and modern user experience across cloud-native services

Cost Efficiency

Automating processes that are costly and time-consuming

Prep-work! MDM Modernization journey



Know Your Environment

Assess your implementation, integrations, customizations and business processes.

Create an Inventory!

Know Your Data Model

Understand the nuances of your Data Model, Entity Relationships and Data Integrity

Weigh Your Options

Understand the strengths and differences of new architecture. Identify high vs. low value components of the solution.

Validate Security/Compliance

Understand the regulations and requirements for your data, geography and usage. Engage CISO early!

Architect a Solution

Architect your solution to meet your business requirements and your optimal cloud architecture

Foundational Benefits of SaaS versus MDM On-Premise

Parameter	On-Premise	SaaS Multi-Tenant
Product and Architecture	• On-prem releases (1 major release annually) • Architecture needs to be defined for HA/DR • Application tunings required for performance	• Monthly releases • Microservices and containerized architecture • HA/DR part of architecture • Cross-platform built on IDMC, DQ, DI, included • Application tuning not needed
Tenancy	• Single Tenant	• Multi-tenant
Monitoring	• Infrastructure monitoring and alerts needs to be defined	• Monitoring and alerting part of service
Scalability	• Vertical scaling • Auto-scaling not possible as server restarts are mandatory for any resource changes	• Horizontal scaling in architecture • Flexibility in capacity management
Performance		
Upgrades	• Upgrades/security patches require planned downtime	• Minimal disruptions
Downtime Impacts	• Server restarts are required for config changes etc. • Security patches require downtime • Affects downtime	• No server restarts required • Typically, security patches do not require downtime • No disruptions
Cost	• Cost of software, 3rd party licenses, infrastructure, personnel and expertise, security, integration, upgrades	• Cost of software

Rewrite, Refactor or Lift & Shift?

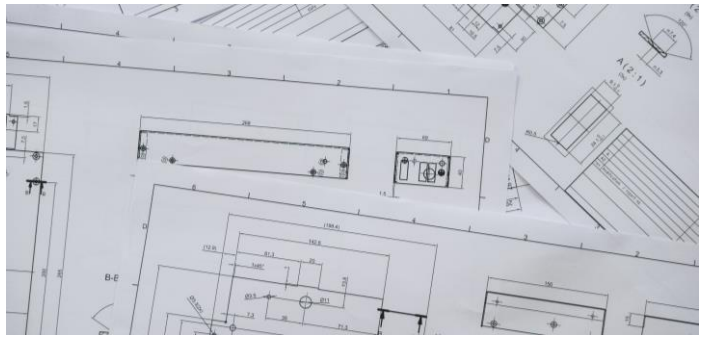
- It's mostly a combination….

Lift & Shift (Modernization Tool)

- Migrate assets "as-is", transferring as much as possible of the existing components without significant changes
- Trade off: missing out on the benefits of modern cloud MDM

Refactor

- Upgrade and enhance solution with new features, technologies and best practices while maintaining its core data model architecture, ultimately optimizing it for MDM in IDMC
- Preferred Approach for MDM Modernization program



Rewrite

- Create a new solution, enabling modern cloud technologies
- The trade-off: Potentially greater time and resource investment
- Necessary for complex customizations without conversion process/tools

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From On-Prem to MDM SaaS

Key Differences that affect your modernization

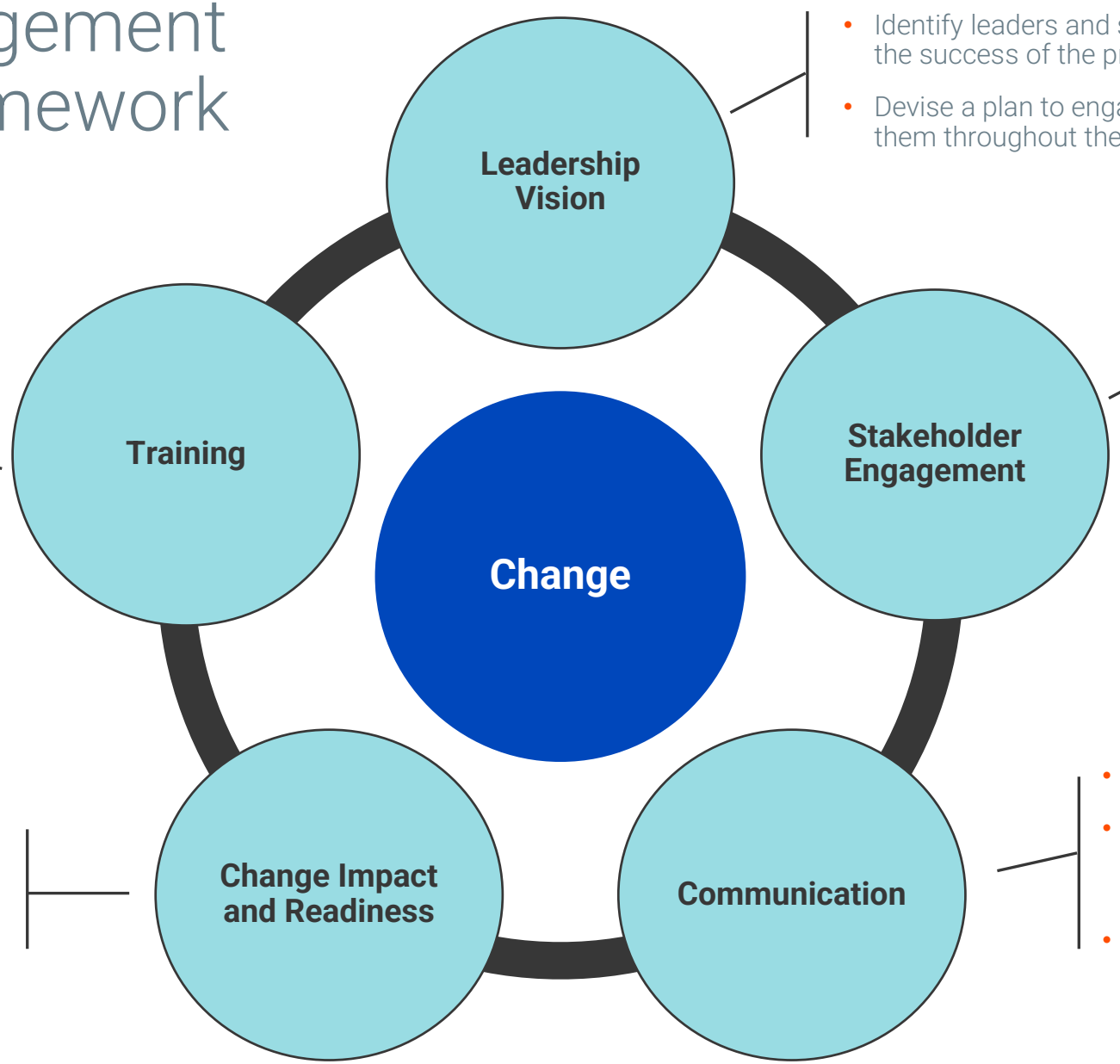
On-Premises	MDM SaaS
Relational Model (RDBMS)	NoSQL – Document Style DB
Direct DB Access & API	B360 Connectors & API
External ETL/DQ for Integrations	CDI/CDQ/CAI for integrations
Customization via UserExits & External Calls	Extensions via CAI and Objective Groups
BO Matching	XREF Matching
Match Paths across any objects	Match within Business Entity
LDAP Authentication	SSO with AD Groups/Roles
SIF / BES API's (XML/REST)	B360 API's (REST)
IDQ Webservices integration	CDQ native integration
ActiveVOS workflows	CAI workflows

Business Engagement is KEY!

Empowering Progress: The Vital Role of Business Users in Modernization

- Engage Business Users Early
  - Get involved in the project from the beginning to understand the goals and objectives.
- Understand the Vision
  - Familiarize yourself with the vision for the modernization project and how it aligns with the overall business strategy.
- Attend Demos, Training and Workshops
  - Participate in training sessions to learn about the new MDM SaaS, Cloud Data Integration and Cloud Application products being introduced.
- Provide Feedback
  - Actively share your insights and feedback on the proposed changes, especially if they impact your day-to-day operations.
- Prepare for Changes in Business Processes
  - Anticipate adjustments in workflows and processes and be ready to adapt to the new way of doing things.
- Maintain Flexibility
  - Be open to adapting to new technologies and methodologies as the project evolves.

Change Management Approach Framework



- Identify leaders and sponsors critical to the success of the project.
- Devise a plan to engage and influence them throughout the project

- Identify Key stakeholders.
- Understand their influence and support for the project
- Devise engagement plans

- Shape the vision for change
- Define strategies to build understanding and engagement from the various stakeholders.
- Put in effective feedback loops

- Understand how ‘change ready’ the stakeholders are.
- Assess the scale and impact of the change for each stakeholder group and define a plan to increase their readiness

- Assess the training needs necessary to build the required capabilities to support the proposed changes

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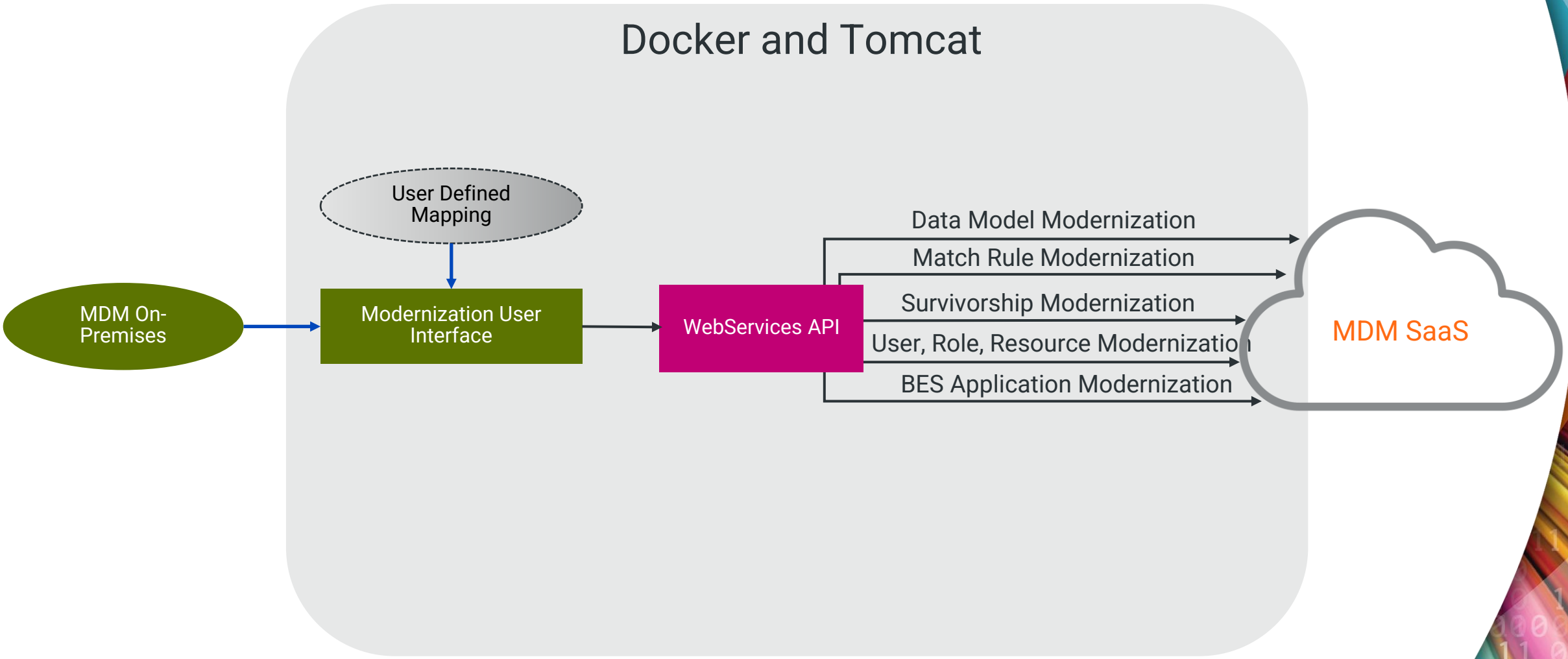
What to cover on the Modernization tool

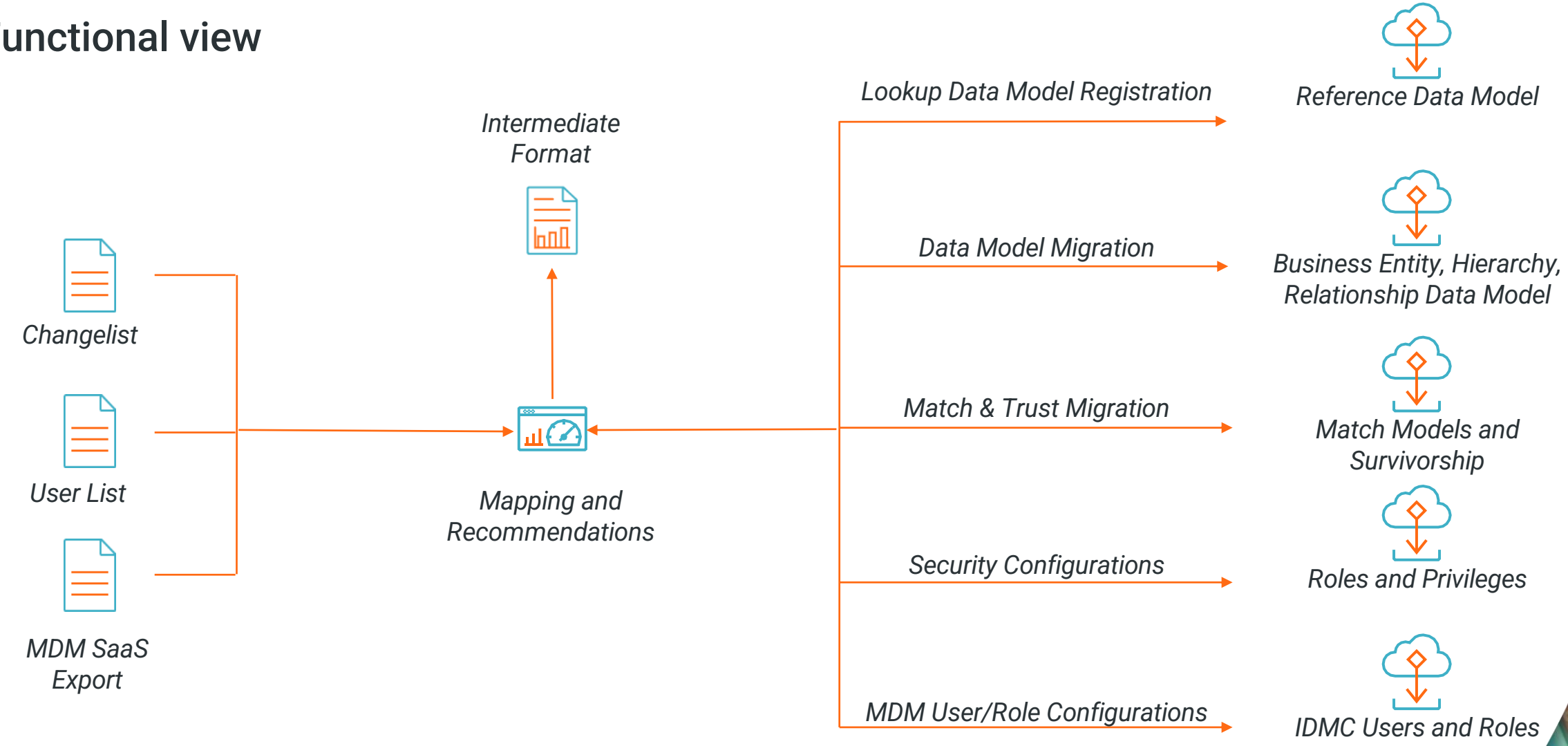
- Best practices for MDM on-premises modernization
- Best practices and rules to use MDM modernization tools
- How to use MDM modernization tool to modernize the following:
  - Lookup data model modernization
  - BE AS IS data model modernization
  - Match rule, survivorship, user, role and resource permission modernization
  - Hierarchy and network modernization
  - On-premise person BE to an existing SaaS person BE modernization

MDM Modernization



Modernization Tool

Functional view



Modernization Tool

What is not covered?

- Integrations
  - Initial or Incremental jobs
  - Operational Jobs & Schedules
- Data Migration
  - BE/XREF data cutover
  - Lookup Data
- Customizations
  - User Exits, External Calls
- On-Prem Cleanse/Graph functions
  - Siperian Functions
  - Custom Libraries
  - IDQ WS Library

Implementation Best Practices

Data model

- Decide the MDM application
  - Customer360, Supplier360, Product360, Multidomain MDM, Reference360
  - Accelerator
- Entity360 BEs
  - Determine which Business Entities (BEs) should be modernized, considering true domain entities (e.g., is "Address" a standalone BE or should it be part of "Person" or "Organization"?).
  - Choose between modernizing entities "AS IS" or leveraging existing out-of-the-box Business Entities (BEs).
- Subject Area based IDD – come up with relevant BE
- AS IS BE – if there is no search field,
  - No search component in SaaS for the BE and won't be able to search in that BE
  - Make at least one field searchable, create a search component that's able to be searched

Implementation Best Practices

Lookup data model

- Lookup modernization to Referece360
- Name, Code and Description are being used
- If name is missing in on premise, use code for name

Implementation Rules

Source system and survivorship

- Source system should not have spaces.
- Source system should start with lowercase alphabet.
- Trust scores are being converted from 0-100 to 0.0 to 1.0 with increments of 0.1.

Implementation Rules

Match rules

- Modernization puts match rules in draft mode:
  - Review
  - Change if needed
  - Publish
- Only rules for the root base object of the mapped SaaS business entity will be modernized.
- All fields in a qualifying rule must be mapped for a rule to be modernized.
- **Optimization:** If the rule has a segment match configured on the party type column and the value of the party type is the same as the name of the target business entity (i.e. “Organization” or “Person”), the rule will be applied to only that SaaS business entity. If there is no segment match configured, the rule will be applied to all SaaS business entities.
- Matching is on cross reference record

Implementation Rules

Role permissions

- If any field in an on-premise BO or BE has the execute permission, the entire SaaS entity will be given “run” and “file import”.
- If the “create” permission has been granted, the “update” permission is also given. This is a SaaS requirement.

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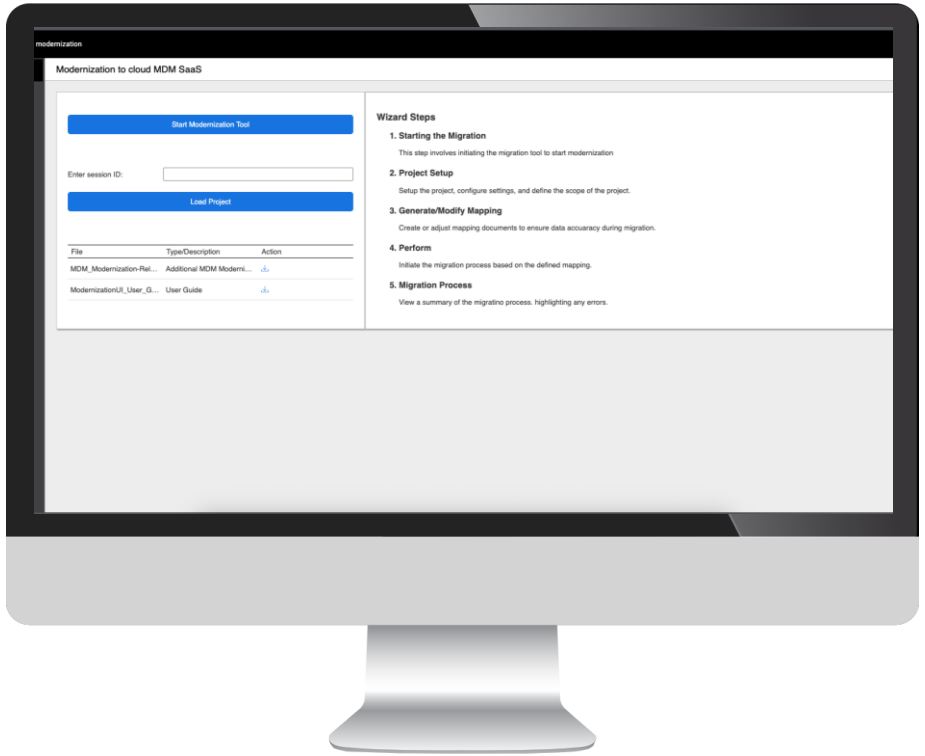
DEMO

Modernization Tool



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MDM On-Prem to MDM SaaS Data Migration

Data migration approach

On-Prem lookups/reference data to SaaS Reference 360

MDM on-prem main base object data to MDM SaaS business entities

- From top-most parent tables through child tables

  Using data from the XREF tables -- the data source records

- Data loading into MDM SaaS for IDL will use Load-By-BusinessID

  Similar to the on-prem Load-By-RowidObject

  Using Implicit merges to copy the on-prem XREF data into SaaS and maintain merges as they were in on-prem

Relationships data

Hierarchy relationship data

MDM On-Prem to MDM SaaS Data Migration

Prerequisites

Perform an on-prem Data Consistency Check Using the Data Consistency Check Utility

- Identify child XREF records that are referencing the wrong parent XREF records
- Correct data inconsistencies

All MDM SaaS assets need to be configured

- Business entities, source system, survivorships
- Relationship and hierarchy configurations

On-Prem ORS access privileges

- The username used in the CDI connector for the ORS must have read access to on-prem C_REPOS tables and all user data tables

MDM SaaS Reference 360

- Has all necessary reference data to support the data load from MDM on-prem

Business Entities, relationships and hierarchies need to be cleared of all data

MDM On-Prem to MDM SaaS Data Migration

Using Load-By-BusinessID for data migration

Seed the MDM SaaS Business Entity with on-prem ROWID_OBJECT as the SaaS BusinessID

For every topmost parent base object record - using Organization as an example

- For every MDM unique ROWID_OBJECT by Party Type (example: “Organization” record)
- Seed the target SaaS Organization business (BE) with ROWID_OBJECT as the BusinessID from the on-prem XREF records
  - Using the topmost parent XREF where the ROWID_OBJECT = ORIG_ROWID_OBJECT and PARTY_TYPE = ‘Organization’
    - The root XREF record where other XREF records merged into

	ROWID_XREF	PKEY_SRC_OBJECT	ROWID_SYSTEM	ROWID_OBJECT	SRC_LUD	OTHER_FIELD_1	OTHER_FIELD_NTH	ORIG_ROWID_OBJECT
1	367	005278846	DNB	78	09-OCT-06 04.00.00.000000000 PM	.....	.....	78
2	472	078959871	DNB	288	09-OCT-06 04.00.00.000000000 PM	.....	.....	288

  - Including all user fields from topmost parent through all related child table records

The BusinessID seeding load has be to be performed one source at a time

MDM On-Prem to MDM SaaS Data Migration

Required CDI/Business 360 assets for the data loads

For each Business Entity

- One set of CDI Mappings with MappingTask
- One CDI TaskFlow for each data sources
- One Business 360 Job Definition for each data sources

For each Relationship

- One set of CDI Mappings with MappingTask
- One CDI TaskFlow for each data sources
- One Business 360 Job Definition for each data sources

For each Hierarchies

- One set of CDI Mappings with MappingTask
- One CDI TaskFlow for each data sources
- One Business 360 Job Definition for each data sources

Questions

Thank you