

Multidomain MDM SaaS Best Practices

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Agenda


Best Practices For :

- Set up Applications
- Data Modelling
- SDLC Asset Migration
- Secure Agent Best Practices
- Ingress (FEP Mapping, DQ rules)
- Egress Job
- Relationship & Hierarchies
- Business UI Configurations (Application & Pages)
- Reports
- Reference 360 SDLC
- Reference 360 Data Import and Export


IICS Services

 Informatica Intelligent Cloud Services Log Out


My Services




Application Integration Console




Business 360 Console★




Customer 360★




Data Integration




Data Profiling




Data Quality




Multidomain MDM★




Product 360★




Reference 360★



Supplier 360★



Administrator

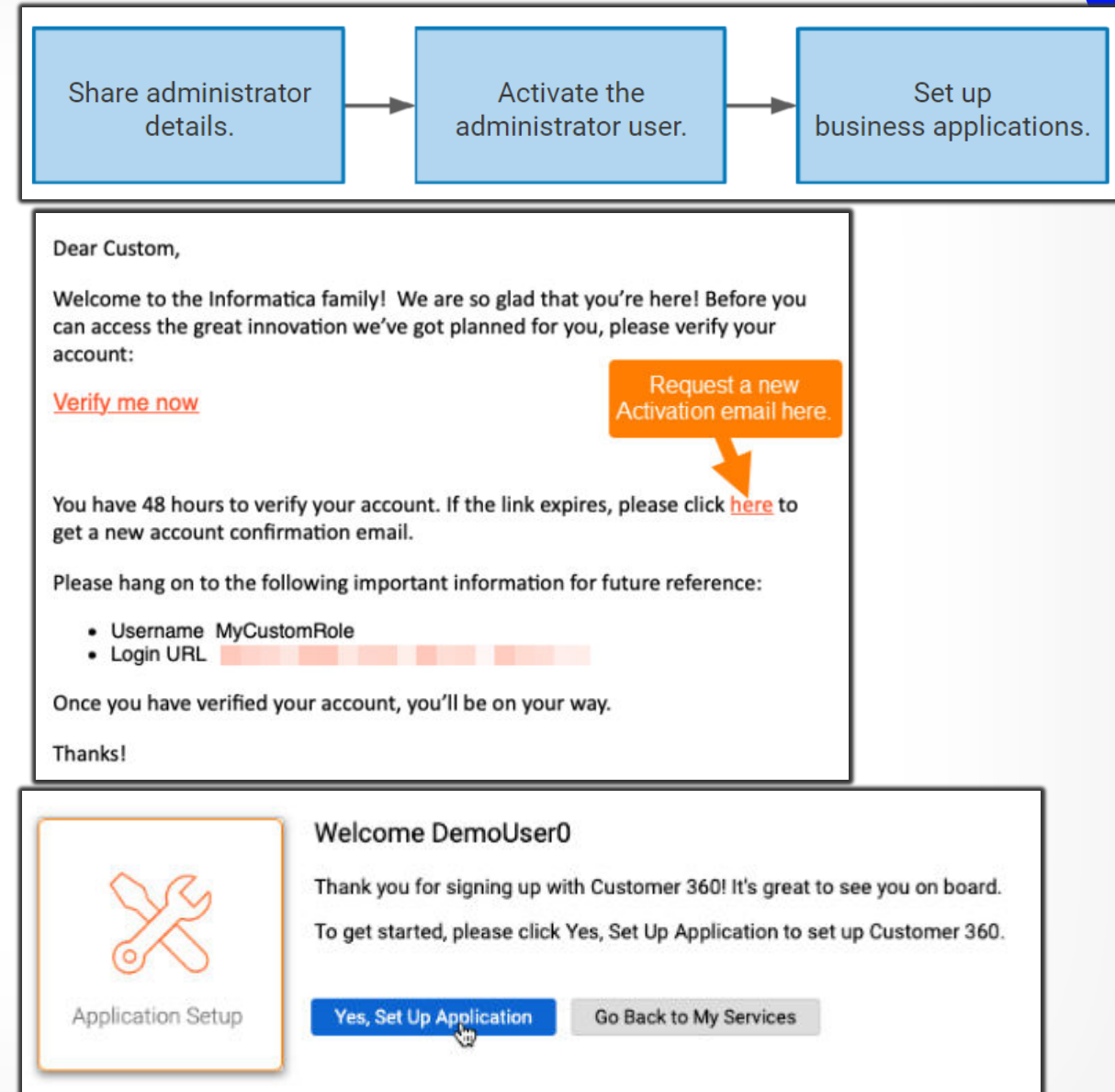


Monitor

Set up Business Applications

For any New Org activation – It's a 3 Step process.

- A Customer Success Manager (CSM) will reach out to customer to get the administrator user details. (Email, First Name, Last Name, Phone no, Address).
- After the Shipping team creates org account, administrator user will receive an email to confirm your account. The account confirmation link is valid for 48 hours.
- After you activate the account, customer should log in to Informatica Intelligent Cloud Services and set up the business applications.





Set up Business Applications Key Points

- User should have "Admin" + MDM Designer + Deployer role in Administrator – Users.
- All Business 360 processes in the Application Integration chicklet, should be in Published State.
- Org should be upgraded to latest release from Business 360 before performing Set up Applications.

Business 360 Console -> About -> Org Version.

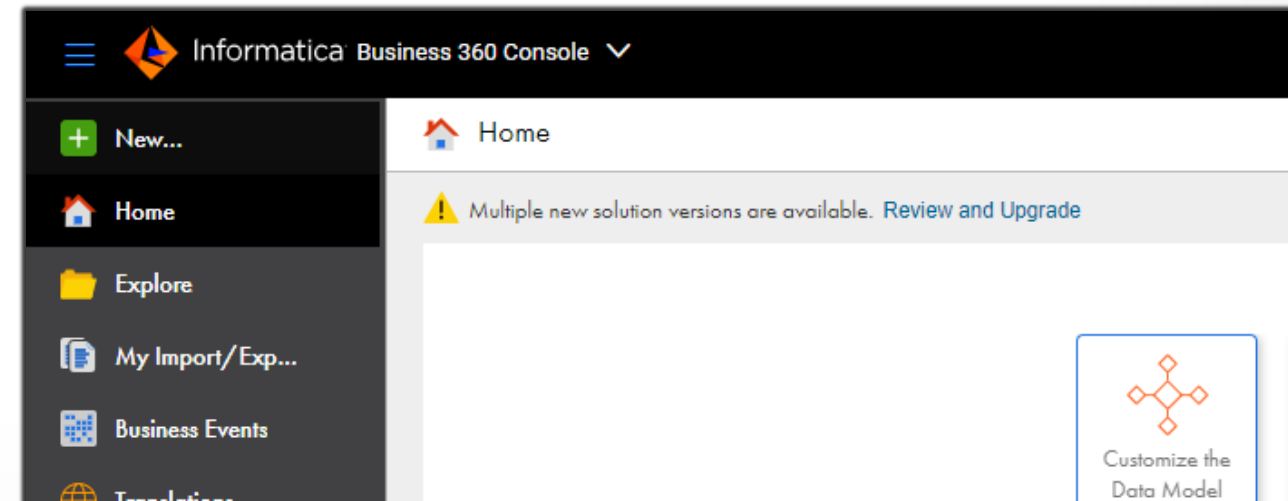
- User should perform the Set-up Applications before doing any code migration of any asset in org.

Application Integration ▾ Org - Prashant ▾

Explore ▾ All Projects ▾ > Business360 New Folder

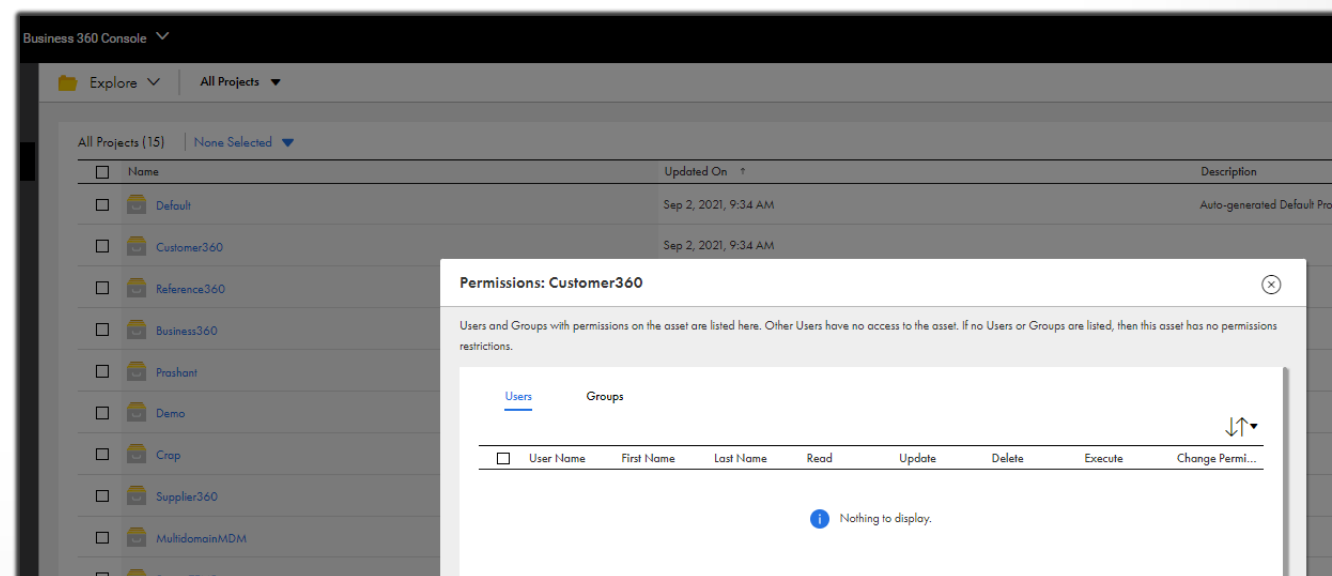
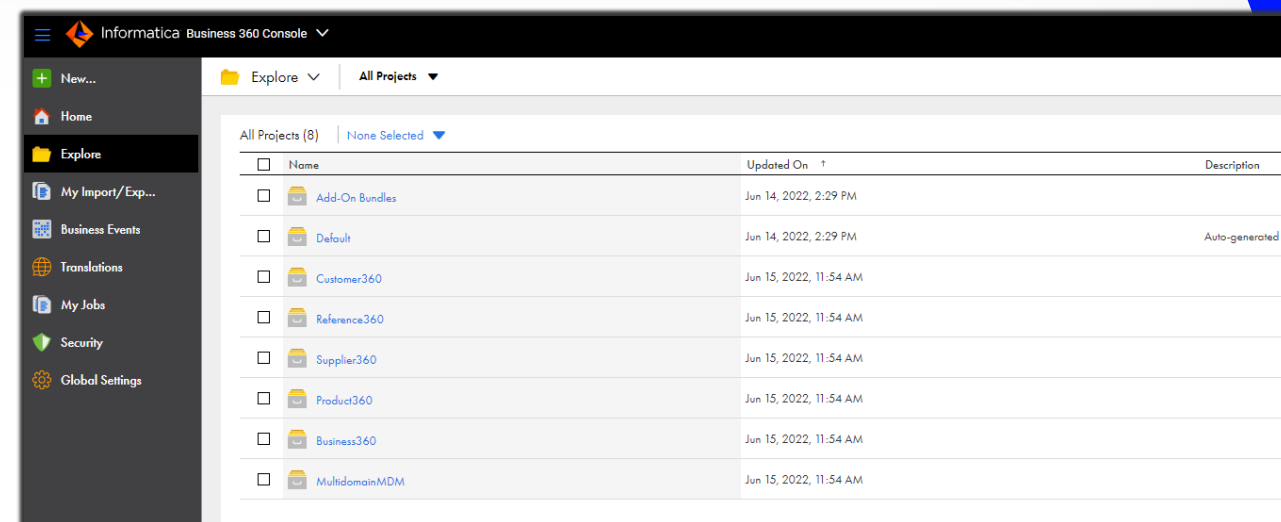
Business360 (9)

<input type="checkbox"/>	Name	Type	Updated On	Description	Tags	Status	Published
<input type="checkbox"/>	MDM Multi-Step Approval Template	Process	Nov 11, 2022, 2:10 AM			Valid	Published
<input type="checkbox"/>	MDMEgress	Process	Nov 11, 2022, 2:10 AM			Valid	Published
<input type="checkbox"/>	MDMExtractandValidate	Process	Nov 11, 2022, 2:10 AM			Valid	Published
<input type="checkbox"/>	MDMGenerateMergeTasks	Process	Nov 11, 2022, 2:10 AM			Valid	Published
<input type="checkbox"/>	MDMIngress	Process	Nov 11, 2022, 2:10 AM			Valid	Published
<input type="checkbox"/>	MDMMatchMerge	Process	Nov 11, 2022, 2:10 AM			Valid	Published
<input type="checkbox"/>	MDMMatchReIndex	Process	Nov 11, 2022, 2:10 AM			Valid	Published



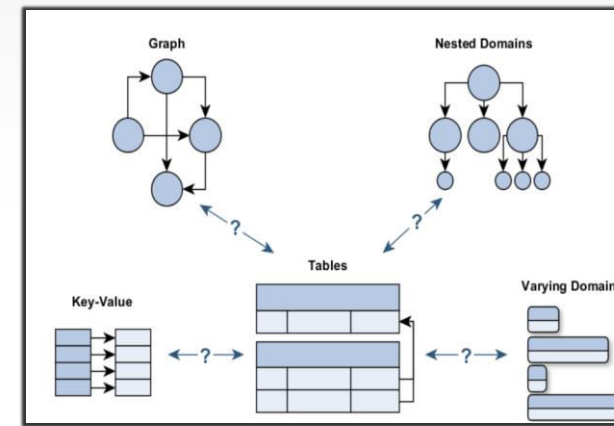
Set up Business Applications Contd..

- Create other projects for all additional required assets such as mappings, mapping tasks, task flows or even other MDM SaaS assets and avoid using OOTB (Business 360, Customer 360, MultiDomain MDM, Reference 360, Supplier 360, Product 360) projects for these assets.
- There should not be any permissions set on the OOTB folders in Explorer Tab in B360. (Business 360, Customer 360, MultiDomain MDM, Reference 360, Supplier 360, Product 360).
- Source control version for OOTB & Custom folders containing MDM assets currently not supported.

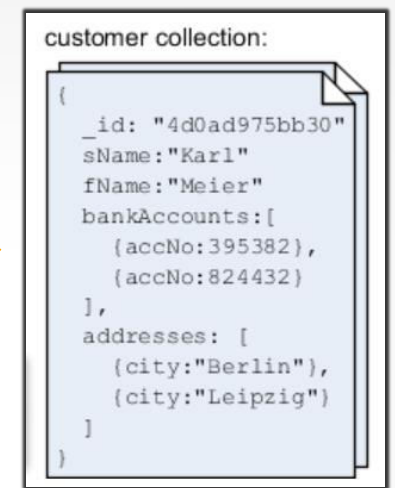


Data Modelling

- Pivoted data modelling strategy from relational database modelling to more advanced Document database style modelling
- Providing "Out of the Box" Data Models for easier modelling experience – Person & Organization
- Introducing "Smart Fields" to provide low effort enjoyable modelling experience. Smart fields are building blocks for common fields, such as address, email, and phone
 - Add or delete fields from a smart field is not supported.
 - Disable the fields that are part of the default search layout is not supported.
- Enhanced Basic Fields of different data types & Field Groups to provide better flexibility
- Bringing in Reference Data Assets for easy Lookups



From Traditional
"Relational Database style"



To Advanced "Document
Database style"

Smart fields Available in GA



Postal
Address



eMail



Phone

T
Text

123
Integer

1.23
Decimal

100
Double

✓
Boolean

📅
Date and Time

31
Date

+
Field Group

☰
Picklist

📄
Dependent Picklist



Data Modelling Key Points

- Once we have the Data Model finalized and we create respective Assets in the ORG, for any new Business use cases, we recommend to create a new Assets in new Project under Explore as part of Data Model.
- Field names: try to give a smallest field name as possible, as this contributes to the overall document size of the record being created.

For example:- Field Group: AlternatIdentifier:
Fields: AlternatIdentifierValue, AlternatIdentifierType

Changing this to: AltId: Fields: value, type. And if I have 1K alternative identifier It is saving 40K characters.

- The more the number of Advanced DQ rule, performance will be impacted.
- Currently delete/remove any existing Assets (Business Entity, FieldGroup, Attributes) from Data Model is not supported. Please use disable for now.

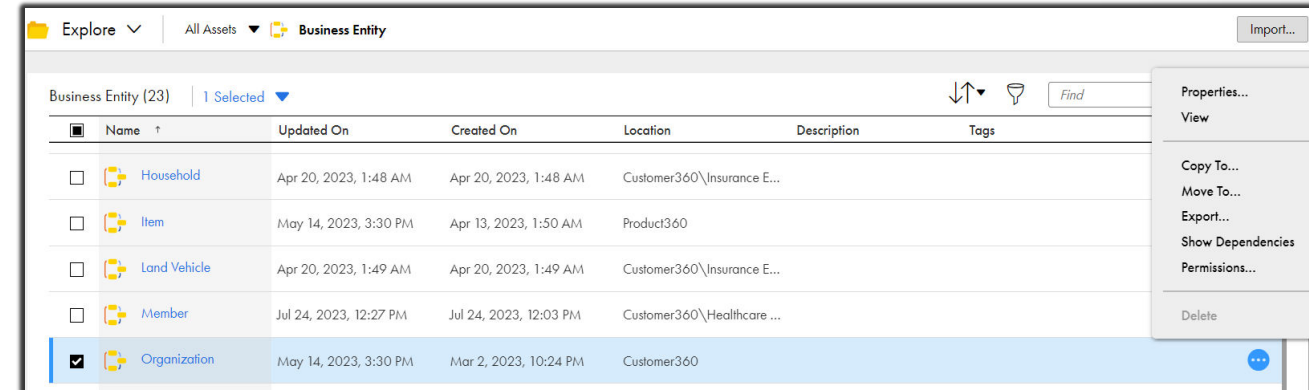
[FAQ KB : https://knowledge.informatica.com/s/article/FAQ-SAAS-Data-Model-for-OOTB-BE-s?language=en_US](https://knowledge.informatica.com/s/article/FAQ-SAAS-Data-Model-for-OOTB-BE-s?language=en_US)

SDLC Asset Migration

Assets list are as follows :-

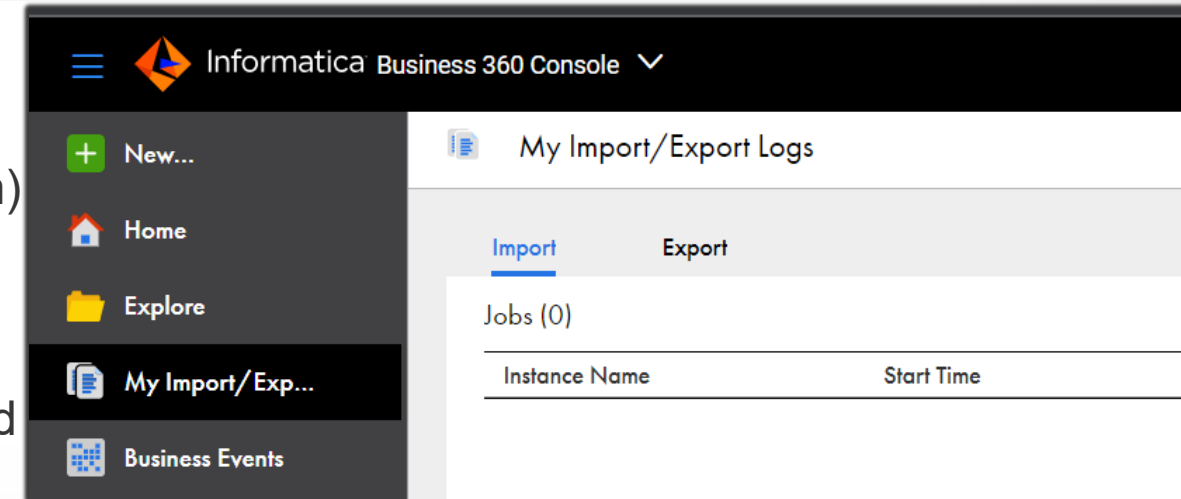
1. Business Entity and all customizations within it which includes –
 - Custom fields, field groups , smart fieldgroup instances
 - Light weight DQ rules, Advanced DQ rules , DaaS
 - Match Rules and Configurations
 - Survivorship Configurations
 - Search Configurations
2. Business Application
3. Pages
4. Components
5. Job definitions
6. Source System
7. Business Event definitions
8. Reference Data Set (Code Lists- Enterprise and Custom)
9. Hierarchies
10. Custom BE
11. Relationships
12. Authorization Configuration (Custom Roles with IICS and Privileges)

**** Process & Job Schedulers are **not** supported.**



Business Entity (23) | 1 Selected

	Name	Updated On	Created On	Location	Description	Tags
<input type="checkbox"/>	Household	Apr 20, 2023, 1:48 AM	Apr 20, 2023, 1:48 AM	Customer360\Insurance E...		
<input type="checkbox"/>	Item	May 14, 2023, 3:30 PM	Apr 13, 2023, 1:50 AM	Product360		
<input type="checkbox"/>	Land Vehicle	Apr 20, 2023, 1:49 AM	Apr 20, 2023, 1:49 AM	Customer360\Insurance E...		
<input type="checkbox"/>	Member	Jul 24, 2023, 12:27 PM	Jul 24, 2023, 12:03 PM	Customer360\Healthcare ...		
<input checked="" type="checkbox"/>	Organization	May 14, 2023, 3:30 PM	Mar 2, 2023, 10:24 PM	Customer360		



Informatica Business 360 Console

My Import/Export Logs

Import Export

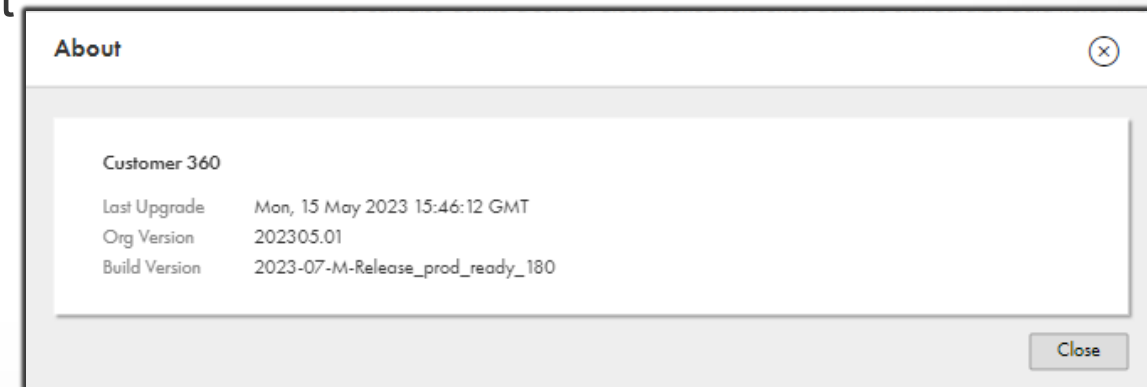
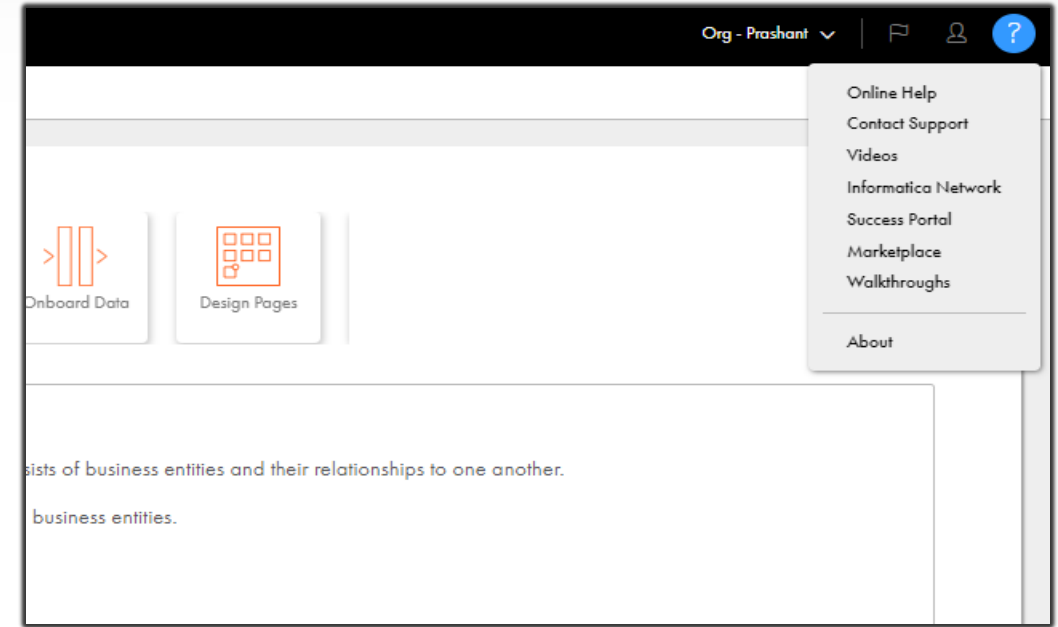
Jobs (0)

Instance Name	Start Time
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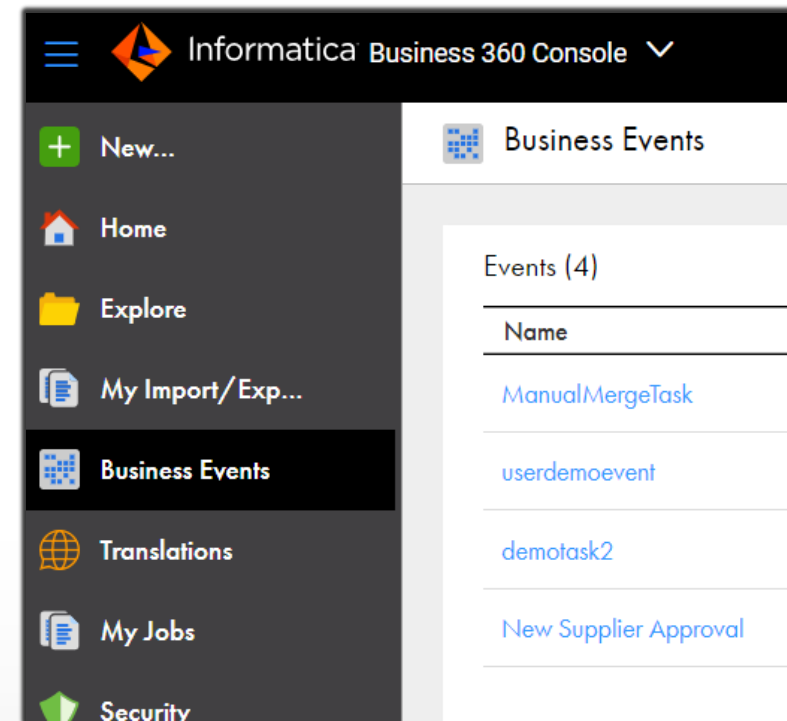
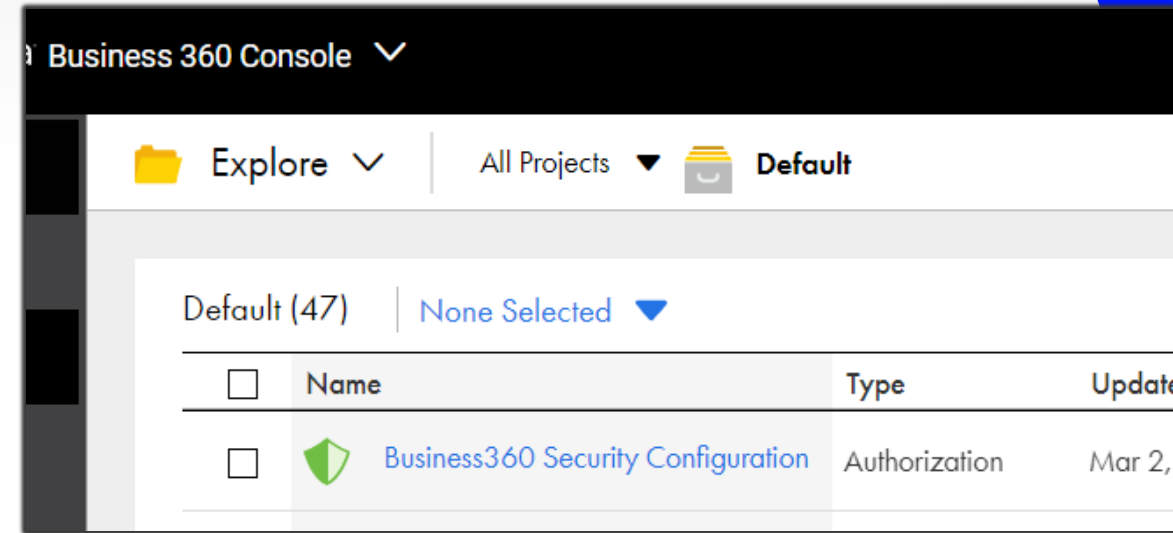
SDLC Key Points

- Before any SDLC, please make sure "Set Up Applications" is completed in all applications.
- SDLC to be performed between same modelled versioned orgs.
- To perform, we need MDM Designer role.
- Before import of assets into target org, take an export of target assets which in turn can be used to import back during any failures.
- Move assets into target org through SDLC (export & import).
- Currently move/copy of assets from one folder to another is not supported in same org.



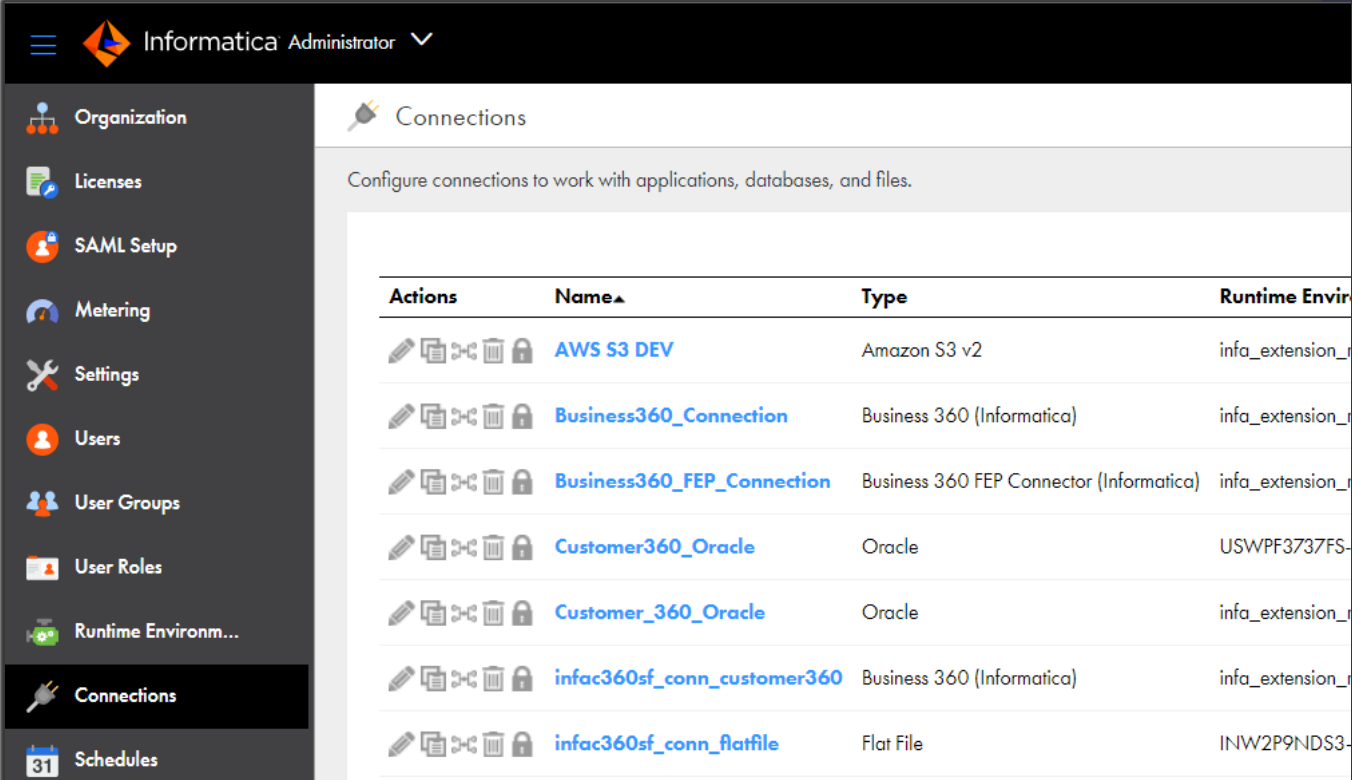
SDLC Contd..

- Admin Role to be used for SDLC of Authorization asset which will export roles and associated IICS and MDM privileges.
- If Designer and MDM Designer roles are used make sure all assets are exported and imported first excluding Authorization asset and Business Events. Post successful import of other assets Authorization asset can be exported and imported using Admin role.
- Use same level of roles to make changes in source and to perform SDLC.
 - For ex: If user with Admin role is being used to make changes, make sure user with Admin role is used to do SDLC. Same goes with user mapped with Designer + MDM Designer roles. When changes are done with Admin and for SDLC if Designer +MDM Designer roles get used very high probability of hitting into errors like “protected metadata.”






































SDLC Contd..

- Make sure connections are created in target before DI assets (Taskflows) are imported into target.
- License check will not be done through SDLC, so we must make sure only licensed solution assets are imported into target orgs to avoid any errors.

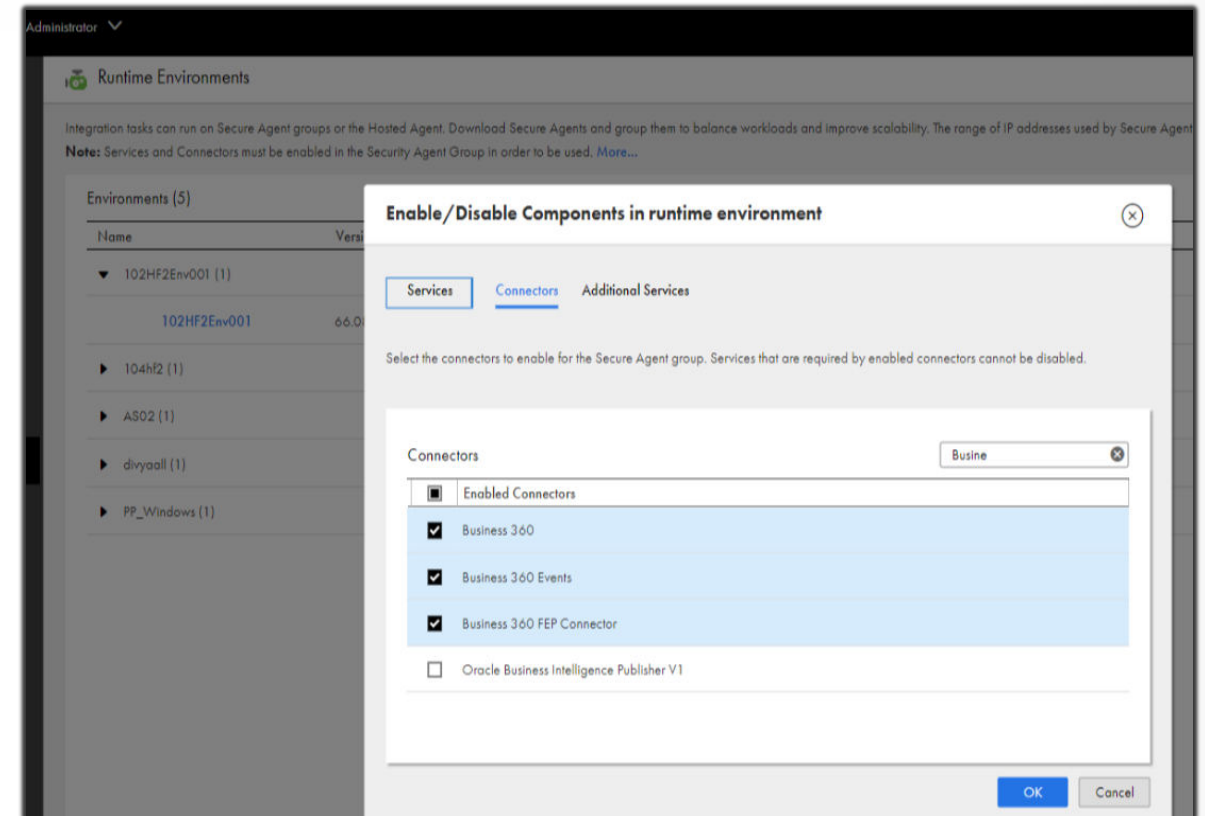


The screenshot displays the Informatica Administrator web interface. The left sidebar contains navigation links: Organization, Licenses, SAML Setup, Metering, Settings, Users, User Groups, User Roles, Runtime Environ..., Connections (highlighted), and Schedules. The main content area is titled 'Connections' and includes the instruction 'Configure connections to work with applications, databases, and files.' Below this is a table listing various connections.

Actions	Name▲	Type	Runtime Envir
    	AWS S3 DEV	Amazon S3 v2	infa_extension_
    	Business360_Connection	Business 360 (Informatica)	infa_extension_
    	Business360_FEP_Connection	Business 360 FEP Connector (Informatica)	infa_extension_
    	Customer360_Oracle	Oracle	USWPF3737FS-
    	Customer_360_Oracle	Oracle	infa_extension_
    	infac360sf_conn_customer360	Business 360 (Informatica)	infa_extension_
    	infac360sf_conn_flatfile	Flat File	INW2P9NDS3-

Secure Agent Overview

- § Secure agent(SA) :
 - § Lightweight
 - § Self-upgrading program
 - § Runs inside customer network
- § Move Data Source --> Target.
- § IICS SA runs and executes different tasks.
- § Enables secure communication between your organization and Informatica Cloud.
- § Business 360(Hierarchical), Business 360 FEP and Optionally Business 360 Publish Event connector to be enabled.





Secure Agent Key Points

- **DIS** service heap space. Need to increase if we see java heap space related message in :
 - Test connection
 - Metadata fetch
 - Agent logs(tomcat logs or tomcat out)
 - Designing mapping
 - Recommended value 4192 MB
- **DTM** - If you hit java out of memory or java heap error messages at run time of a mapping task execution(observed in session log), then memory attributes need to be defined as JVMOptions under DTM.
 - Need to defined under JVMOption like under JVMOption1, JVMOption2 and so on.
 - Each JVMOption parameter accepts one JVM parameter only.
 - JVMOption5 is the last default one, custom property under Type DTM and subtype INFO can be added to add further JVM parameter.
 - -Xmx****m. 2048m is enough.

▼ System Configuration Details

Service: Data Integration Server ▼

Type: Tomcat JRE ▼

Type	Name
Tomcat JRE	INFA_SSL
Tomcat JRE	INFA_MEMORY
Tomcat JRE	JRE_OPTS
Tomcat JRE	JAVA_LIBS

▼ System Configuration Details

Service: Data Integration Server ▼

Type: DTM ▼



Type	Name
DTM	JVMClassPath
DTM	JVMOption1
DTM	JVMOption2

Secure Agent Contd..

maxDTMProcesses Custom Property

Background:

- By default, a SA schedule only two mapping tasks for execution.
- Additional tasks are Queued and becomes eligible for execution when slot is free.

Custom Configuration Details				
Service	Type	Sub-type	Name	Value
Data Integration Server ▾	Tomcat ▾	▾	maxDTMProcesses	16  

Configuring **maxDTMProcesses** results in :

- Better CPU utilization
- Higher degree of concurrency

Recommended value = 0.75 of the No. of CPU cores on SA machine.

Guidelines:

- Do not exceed the terms of your license agreement (from compliance perspective).
- Setting property value > No. of CPU can increase parallelism but can cause performance bottlenecks in execution time.

Secure Agent Contd..

DTM Buffer Size

- DTM Buffer size holds the actual data in blocks for processing.
- DTM Buffer size is automatically calculated based on Buffer block size.
- $\text{DTM Buffer Size} = (\text{DTM Buffer Block Size}) * 10 * N$, where N is the number of partitions.
- Can be increased to increase number of blocks.

DTM Buffer Block Size

- Generally calculated as $2 * X$, where X is the maximum row size of any transformation.

Pushdown Optimization	
Pushdown Optimization type	None
Optimization context type	None
If pushdown mode is not possible, cancel the task	NO
Create Temporary View	NO
Create Temporary Sequence	NO
Advanced Session Properties	
Session Property Name	Session Property Value
Commit Type	Source
Default buffer block size	60MB
DTM buffer size	12GB

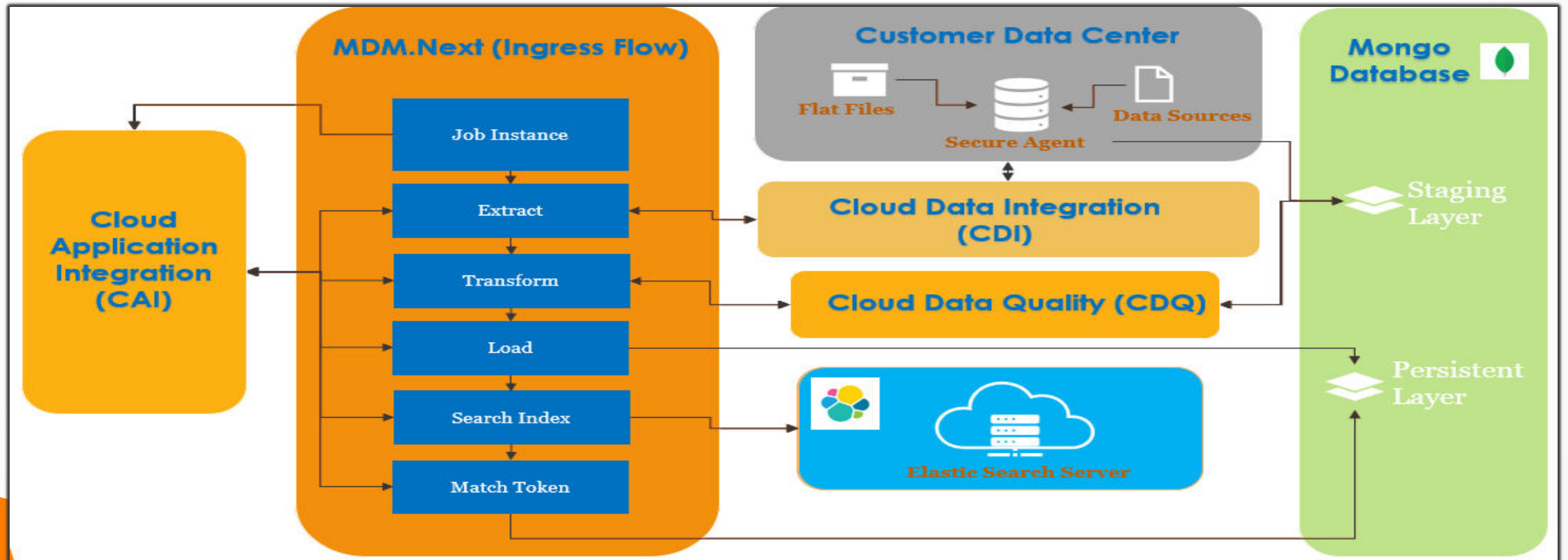
Secure Agent Contd..

- **Use SA Group is recommended.**
 - High availability.
 - Load Balancing.
- **SA behind proxy**, below JVM parameters needs to set :
 - JVMOption1= **-Dhttps.proxySet=True**
 - JVMOption2= **-Dhttps.proxyHost=<proxy_server_hostname>**
 - JVMOption3= **-Dhttps.proxyPort=<proxy_server_portnumber>**
 - JVMOption4= **-Dhttps.proxyUser=<user name>**
 - JVMOption5= **-Dhttps.proxyPassword=<password>**
 - JVMOption6= **-Db360.datastore.useProxy=true**

Administrator -> Runtime Environment -> System Configuration Details -> DTM Type -> JVMOptions
- For each org, we need to have separate Secure agent server. It cannot be shared.

Ingress Overview

- Ingress Flow is the process of moving the data from Customer Data Sources into the MDM SaaS Cloud application using MDM Connectors.
- CAI is used to orchestrate all the microservices which are used in the Ingress Flow.
- Ingress flow consists of 5 main steps.





Ingress Key Points

- **Business 360 FEP connector :**
 - Less computing requirement at SA machine.
 - Simplified logic of mapping.
 - Parallel execution.
 - Joining parent and child data complexity handled at Cloud layer.
 - Ideal if data is being loaded from RDBMS.
 - Recommended connector.

- **Business 360 Hierarchal connector : (B360 Connector)**
 - Ideal if source already has the complete document structure.
 - Else not recommended due to :
 - More computing requirements at SA machine.
 - Requires joining parent and child data at SA side in mapping logic.
 - Not scalable for higher data loads.

Refer KB [Difference Between Business 360 and Business 360 FEP](#)

- **Whitelist MDM Service Static IP's**
Should be done if domain specific whitelisting not allowed.

Ingress Contd..

- **Multibyte data :**

- Set the *INFA_CODEPAGE* = *UTF-8* in the Custom Configuration Details of the Secure Agent.
- Source and Target connection code page is set to UTF-8.
- LC_LOCALE, LC_ALL to en_US.UTF-8 for Unix machine.
- INFA_CODEPAGE=UTF-8 environment variable Windows machine.

Refer KB: [Multibyte character loading Ingress](#)

Custom Configuration Details				
Service	Type	Sub-type	Name	Value
Data Integration Server	Tomcat JRE		INFA_CODEPAGE	UTF-8

- **SourcePkey**

- Alphanumeric characters.
- Allowed special characters:
~!/'=}{|:@#\$%^&*()-_+,<>?`
- Length should not exceed 255 bytes.
- Control characters like **\u001A** i.e. **SUB** etc. and other non printable characters should not be part of sourcePkey. Cleanup such characters.

Ingress Contd..

Best Practices to deal with failed mapping task failure.

Outcome: Fail the CDI task flow when underlying data task fails.

Two options available:

1. First Option:

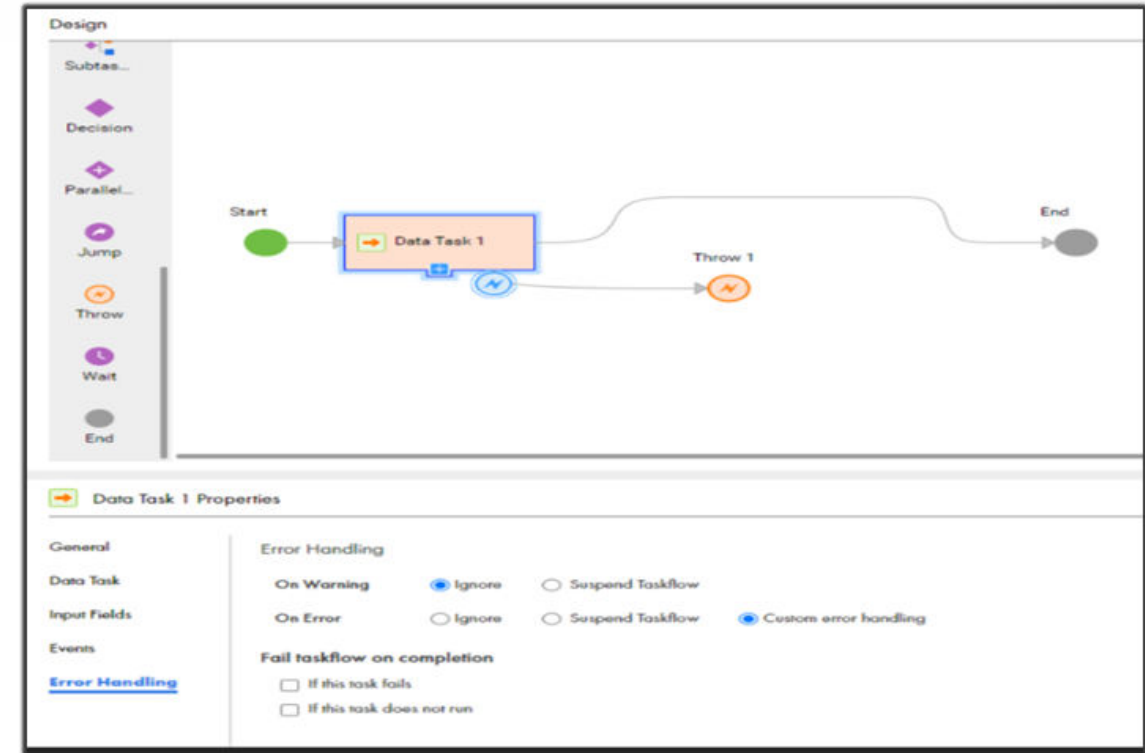
- Under Data Task -> Advanced -> “Suspend on Fault” checkbox should be unchecked.
- Under Error Handling -> On Error “Ignore” option -> Fail task on completion “if this task fails”.
- This option allows all other Data tasks in taskflow to be executed before marking taskflow as failed.

The screenshot displays the Informatica workflow designer interface. At the top, a taskflow diagram shows a 'Start' node connected to 'Data Task 1', which then connects to an 'End' node. Below the diagram, the 'Taskflow1 Properties' window is open, showing the 'Advanced' tab. In this tab, the 'Suspend on Fault' checkbox is highlighted with a red rectangle and is currently unchecked. Other options like 'Disable concurrent execution' and 'Send Email on Suspension' are also visible. Below the taskflow properties, the 'Data Task 1 Properties' window is open, showing the 'Error Handling' tab. In this tab, under 'On Error', the 'Ignore' radio button is selected. Under 'Fail taskflow on completion', the 'If this task fails' checkbox is checked.

Ingress Contd..

2. Second Option:

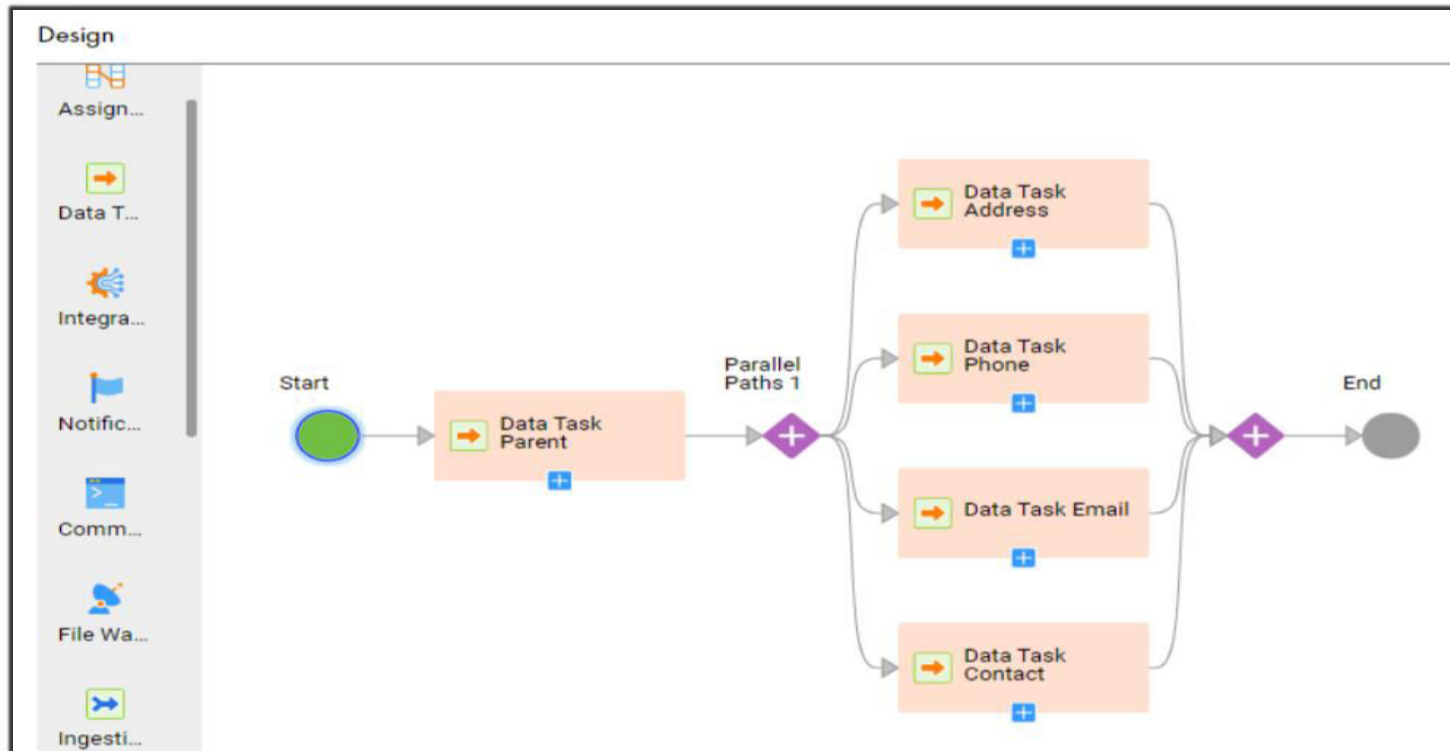
- Under Data Task -> Error Handling -> Custom Error Handling.
This will create a new pipeline in that step.
- Add Throw step to that pipeline. This will cause no other Data tasks to be executed and immediately fail the taskflow.
- If Throw step is not added, connect pipeline to End step. In such case, Select checkbox Fail task on completion “if this task fails” checkbox.



Ingress Contd..

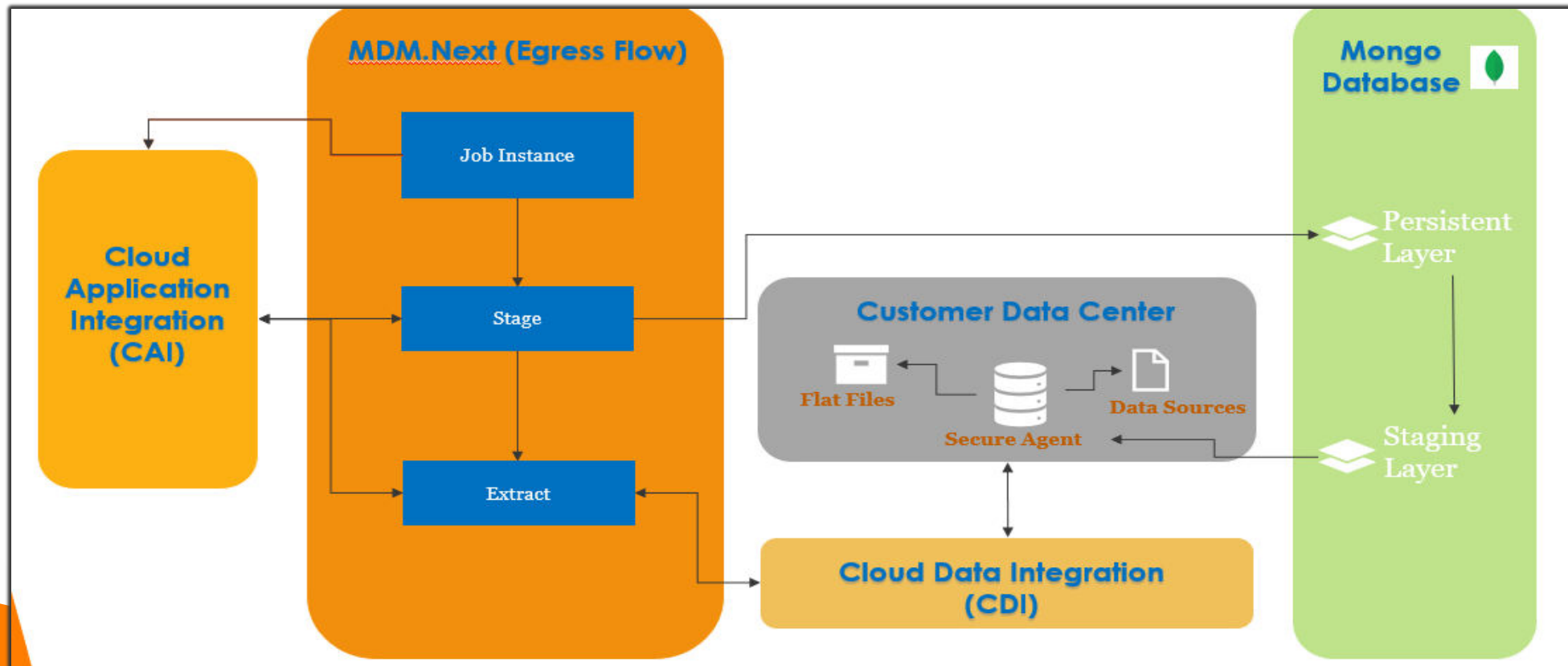
Parallel Data Tasks in Taskflow

- Parallel processing.
- Better resource utilization.



Egress Overview

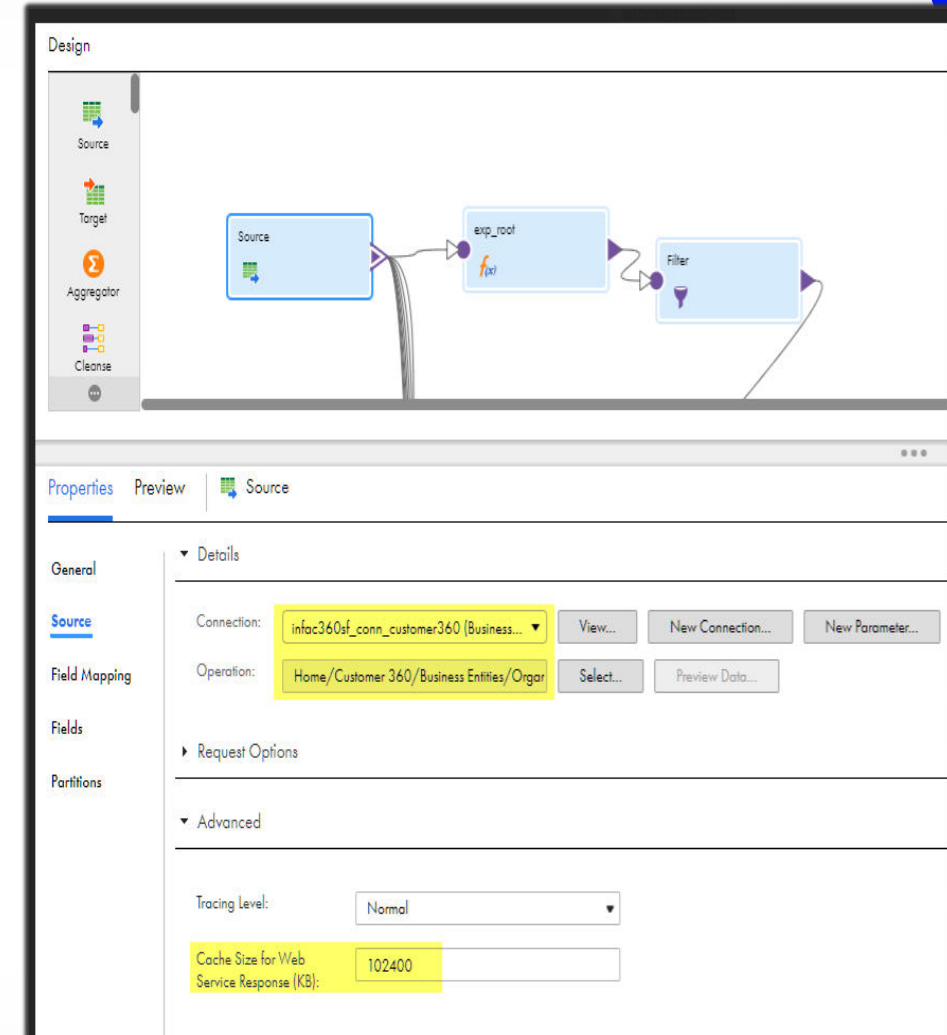
- Egress flow is the process of retrieving the data from the Mongo DB persistent layers and placing it in the target system of customer's choice.
- Egress Flow consists of 2 main steps. Stage and Extract.





Egress Key Points

- Web Service response Cache size. Value should be set to maximum record size document available.
 - Setting it too low value can result in Data Truncation.
 - Setting it too high → impact buffer size calculation, performance and memory utilization.
 - Request GCS Team to get the document size once data is ingressed to get approx value.
- Joiner and Aggregator if used in Egress mapping logic, please consider using sorted input.
- Sorter transformation should be used before Joiner and Aggregator transformation.
 - Sorting should be based on keys used in Joiner and Aggregator.
 - Implicit Sorting logic in Joiner and Aggregator is not efficient for large data set.



Egress Contd..

- During mapping design, check precision of input ports.
- The default length if not set for a column is 255.
Users need to change it and set length based on actual data.
- Maximum allowed length of text field is 4000.
- Consider mapping of only required input fields to further transformation.

By default, all fields are included in the mapping data flow. You can edit field metadata by selecting the field you want to edit.

Fields: (218 of 218 displayed)

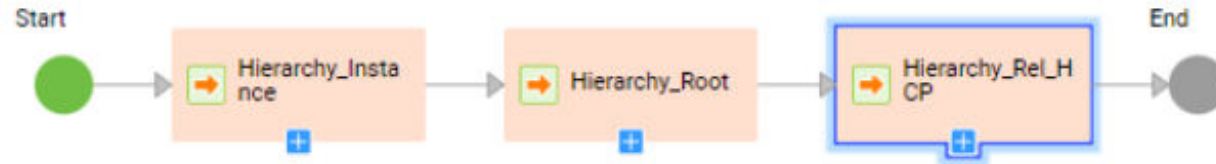
	Name	Type	Precision	Scale	Origin
▼ root					
1	PK_root	bigint	19	0	Home/Customer 360/Business Entities/Organization
2	sourcePKKey	string	25	0	Home/Customer 360/Business Entities/Organization
3	businessId	string	20	0	Home/Customer 360/Business Entities/Organization
4	sourceSystem	string	40	0	Home/Customer 360/Business Entities/Organization
5	creationDate	string	30	0	Home/Customer 360/Business Entities/Organization
6	lastUpdateDate	string	30	0	Home/Customer 360/Business Entities/Organization
7	state	string	25	0	Home/Customer 360/Business Entities/Organization
8	createdBy	string	30	0	Home/Customer 360/Business Entities/Organization
9	updatedBy	string	30	0	Home/Customer 360/Business Entities/Organization
10	originalBusinessId	string	25	0	Home/Customer 360/Business Entities/Organization
11	mergedBusinessId	string	25	0	Home/Customer 360/Business Entities/Organization
12	populationName	string	25	0	Home/Customer 360/Business Entities/Organization
13	notReadyForMatch	string	25	0	Home/Customer 360/Business Entities/Organization
14	name	string	255	0	Home/Customer 360/Business Entities/Organization
15	numberOfEmployees	string	10	0	Home/Customer 360/Business Entities/Organization

Egress Contd..

- Enough disk space(on SA) should be available. At least 250GB.
- Business360 Hierarchal connector is only available for Egress.
 - FEP connector is not available.
 - Active development is progress to support FEP in near Future (Tentative Oct end).
- Logic to filter based on data to be implemented in CDI mapping logic.
 - Egress filtering based on data at source is currently not supported.
- Decide Full Egress carefully.
 - As long as possible all functional solutions should be using delta Egress for performance purpose.

Relationships & Hierarchies

- Separate mapping task to create Hierarchy Instance, Root Record and relationships respectively using FEP connector.



- Unique Relationship pkey used for creating relationship between 2 entities.
- Relationship create(using CDI and File import Batch) between entity records should use SourcePkey(for Parent and child).
 - Currently Batch Import using BusinessID(of Parent and child) is not supported.
- Use CDI Ingress to create relationship between 2 Entities across different source system.
 - IFI currently support creating relationship between 2 entities only from same source system.
- Hierarchy asset name length should not exceed 50 characters.
 - Long asset name causes limit of 75 field length to exceed at CDI side.

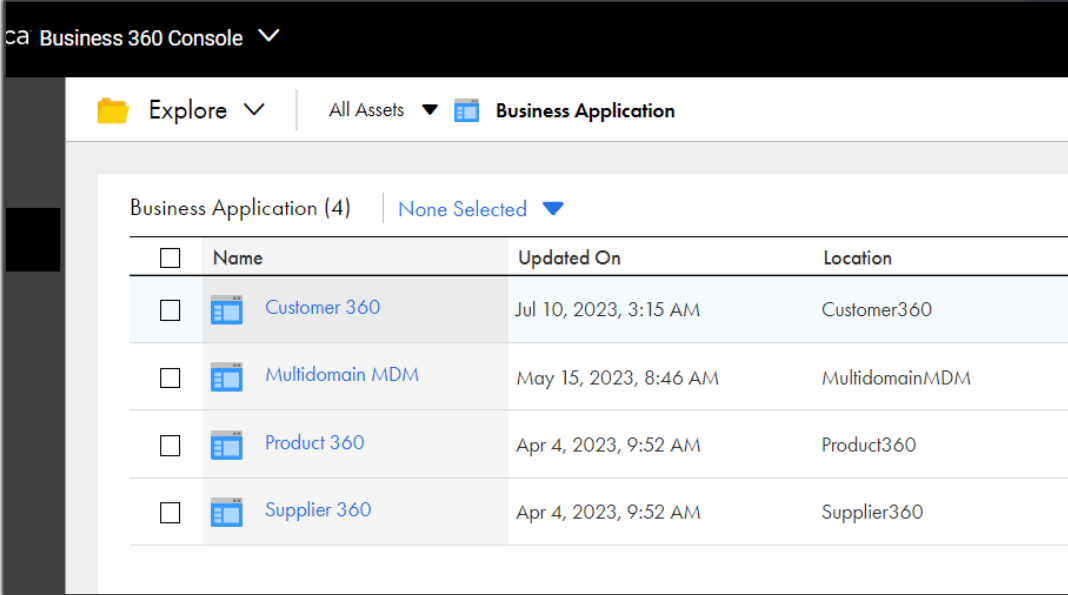
KB - https://knowledge.informatica.com/s/article/000205063?language=en_US

UI Configuration - Application & Pages

- Applications include Customer 360, Product 360, Supplier 360, Multidomain MDM etc.
- Same BE can be assigned to multiple applications if needed.
- Pages created can be tied to Roles.
- Supports till 1000 drop down picklist values.
- Use INFA domain URL for images to be shown in UI.

Key Points

- Not to disable the OOTB field's & its search configuration as it impacts the UI application.
- Don't disable the Custom field if used in Search Result Layout/Page.
-> Remove the field first from layout and then disable.
- Custom fields created in BE doesn't get added to auto generated pages by default. Custom page needs to be created and assigned to BE in application.
- To protect the data from security point of view, use Role Based Access Control (RBAC) & Attribute Based Access Control (ABAC). [Business 360 Console -> Security -> User Roles/Data Access Rules]

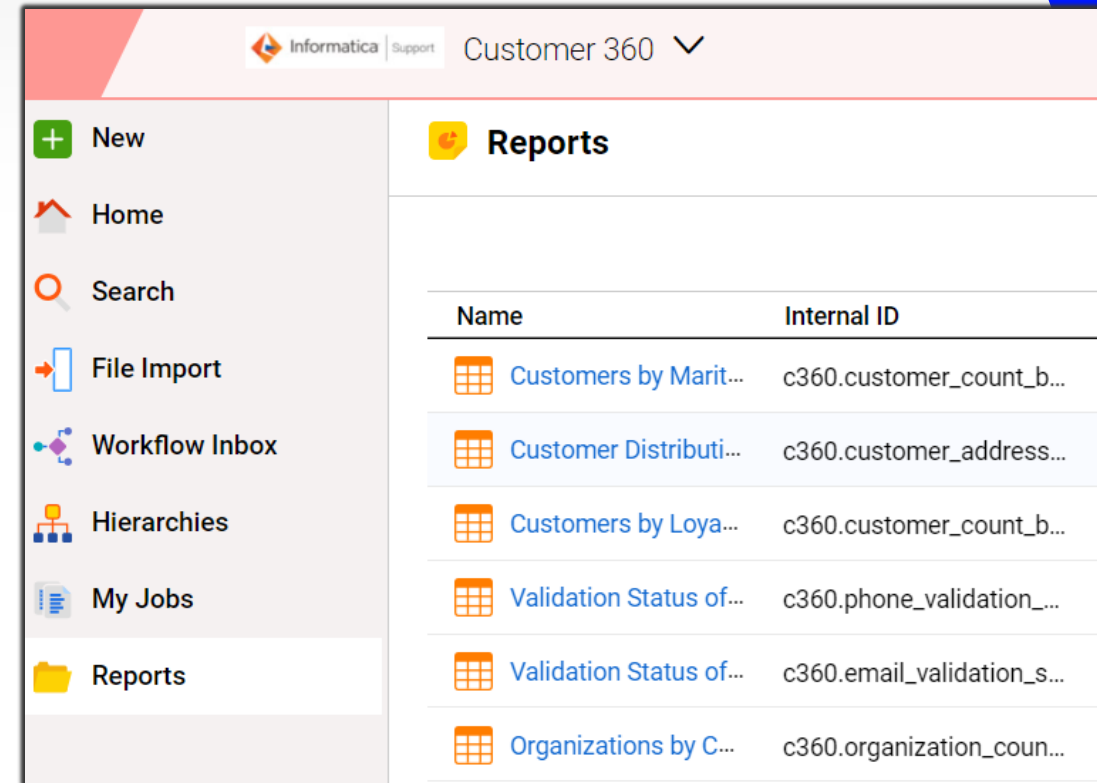


The screenshot displays the 'Business 360 Console' interface. At the top, there's a navigation bar with 'CA Business 360 Console' and a dropdown arrow. Below this, a secondary bar contains 'Explore' with a dropdown arrow, 'All Assets' with a dropdown arrow, and 'Business Application' with a small icon. The main content area shows a table titled 'Business Application (4)' with a 'None Selected' dropdown. The table has four columns: a checkbox, 'Name', 'Updated On', and 'Location'. It lists four applications: Customer 360, Multidomain MDM, Product 360, and Supplier 360, each with its respective update timestamp and location.

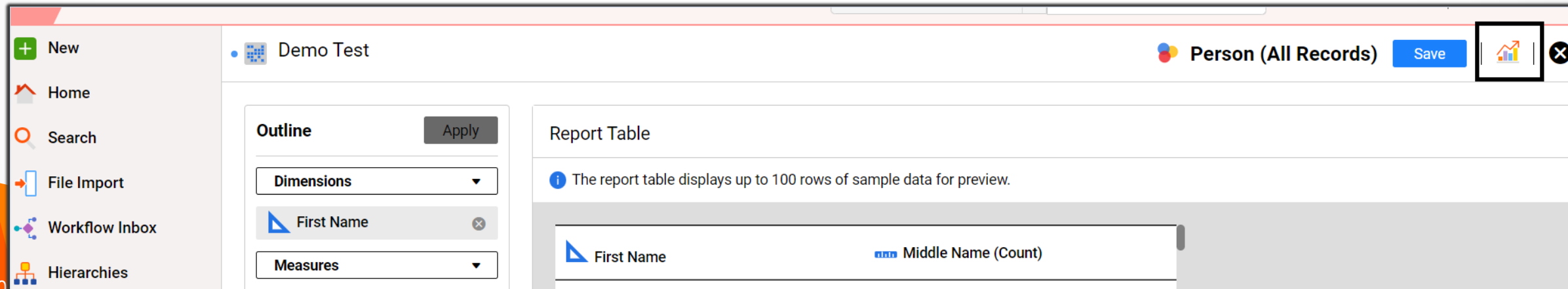
<input type="checkbox"/>	Name	Updated On	Location
<input type="checkbox"/>	Customer 360	Jul 10, 2023, 3:15 AM	Customer360
<input type="checkbox"/>	Multidomain MDM	May 15, 2023, 8:46 AM	MultidomainMDM
<input type="checkbox"/>	Product 360	Apr 4, 2023, 9:52 AM	Product360
<input type="checkbox"/>	Supplier 360	Apr 4, 2023, 9:52 AM	Supplier360

Reports

- User creating the report should have the mentioned X360 Data Steward role.
- If the user won't select configure Chart and directly click on save, then the user can't add a report to the dashboard it will be added in the reports table.
- Only Admin role user can Schedule Reports.
- User can create a maximum of 100 Reports per solution.



Name	Internal ID
Customers by Marit...	c360.customer_count_b...
Customer Distributi...	c360.customer_address...
Customers by Loya...	c360.customer_count_b...
Validation Status of...	c360.phone_validation_...
Validation Status of...	c360.email_validation_s...
Organizations by C...	c360.organization_coun...



Outline Apply

Dimensions

First Name

Measures

Report Table

The report table displays up to 100 rows of sample data for preview.

First Name Middle Name (Count)

Reference 360

Reference 360 License

Basic Edition

Licensing					
Editions (10)				Features (197)	
Edition Name	License	Start Date	Expiration Date	Feature Name	Category
Data Governance Enterprise Trial	Trial	Jul 10, 2...	Jul 10, 2024	REST V2	Connectors
Data Governance and Catalog	Subscription	Jan 6, 20...	Jul 10, 2024	RESTSwaggerGenerator	Packages
Data Integration Advanced Trial	Trial	Jun 14, 2...	Jul 10, 2024	Reference Data Management Basic Edition	
Integration Components for Business 360	Subscription	Jun 15, 2...	Jul 10, 2024	Runtime Environment Selections	
Platform Advanced Trial	Trial	Jun 14, 2...	Jul 10, 2024	SAML based Single Sign-On	
SaaS Edition - Customer 360	Subscription	Jun 15, 2...	Jul 10, 2024	SAP BW BEx Query	Connectors

Full License

- Adding additional attributes in RDA/codelists requires the full Reference360 license
- Workflow Inbox, Stakeholders, Hierarchies process requires full license.

Licensing					
Editions (10)				Features (1)	
Edition Name	License	Start Date	Expiration Date	Feature Name	
Data Governance Enterprise Trial	Trial	Jul 10, 2...	Jul 10, 2024	Reference data management	
Data Governance and Catalog	Subscription	Jan 6, 20...	Jul 10, 2024		
Data Integration Advanced Trial	Trial	Jun 14, 2...	Jul 10, 2024		
Integration Components for Business 360	Subscription	Jun 15, 2...	Jul 10, 2024		
Platform Advanced Trial	Trial	Jun 14, 2...	Jul 10, 2024		
SaaS Edition - Customer 360	Subscription	Jun 15, 2...	Jul 10, 2024		
SaaS Edition - Product 360	Subscription	Jun 15, 2...	Jul 10, 2024		
SaaS Edition - Reference 360	Trial	Jun 15, 2...	Jul 10, 2024		
SaaS Edition - Supplier 360	Subscription	Jun 15, 2...	Jul 10, 2024		
SaaS Edition - Multidomain MDM	Subscription	Jun 15, 2...	Jul 10, 2024		

Reference 360 SDLC

- Reference Data Asset/Codelist to be used within BE data model can be created in SaaS MDM (B360 console) or Reference360 UI.
- Extending the reference data asset/codelist (along with any other subsequent metadata changes) such as creating additional attributes within RDA/Codelist, adding description etc. should be done via Reference360 UI.
- With SDLC we are just importing metadata, so code values will not be exported/imported.

Steps

- Import the dependency from source org i.e., DQ rule, CAI process or any Mapplets/Mapping.
- Export the Reference Data Asset/Codelist used in SaaS MDM via B360 console a.k.a. SDLC from source Org and import into Target Org (B360 console). Note that there is no specific step is needed to export Codelist metadata, Exporting BE and its dependencies will be sufficient.
- Once import is done, for Custom attributes created in R360 to be imported into Target Org we need to use V3 Import APIs.

Reference 360 Data Import & Export

- Loading/Addition of RDA (codelist) values (Lookup values) can be done from
 - Via API to add data into RDA values
 - Via Reference360 UI
 - Via Batch Import Job via Reference360 UI via CDI Mapping
 - Via File Import in R360 with source system "rdm.system.default" selected
- Export code values from a source Env
 - Via Reference360 UI
 - Via Export job from Reference360 UI via CDI Mapping
 - Via API can take export
- Import Code values into a target Env in bulk
 - Via Reference360 UI
 - Via Batch Import Job via Reference360 UI via CDI Mapping
 - Via File Import in R360 with source system "rdm.system.default" selected



Reference 360 Data Key Points

- Updates to Reference data (Code values) will showcase updated values for MDM BE records data when we open the record in UI only if below configuration is set on Picklist Field.

For new MDM BE records and updated MDM BE records will see updated lookup data.

- To Load data in R360 Code values, please use “rdm.system.default” source system only.
- Should not rename the codelists specially when we have mapping being created for CDI export/import.
- Deletion can be done from UI one by one or in chunks using API (max 50), but we prevent deletion if the code value is used as a lookup.



Thank You