

Dec 1, 2020

MDM UI for your Business - Reimagined!

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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 to view on our **INFASupport YouTube channel** and **Success Portal**. The link 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 with
Chatbot integrations



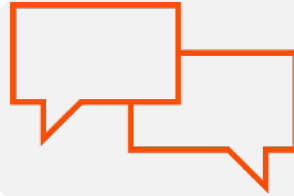
Tailored training and
content
recommendations

More Information



Success Portal

<https://success.informatica.com>



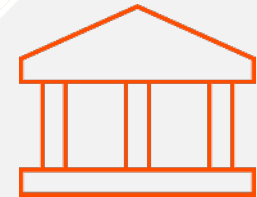
Communities & Support

<https://network.informatica.com>



Documentation

<https://docs.informatica.com>



University

<https://www.informatica.com/in/services-and-training/informatica-university.html>

Safe Harbor

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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.

Agenda

- Overview
- User Interface Components
- Features
- Demo
- Conclusion
- Q&A

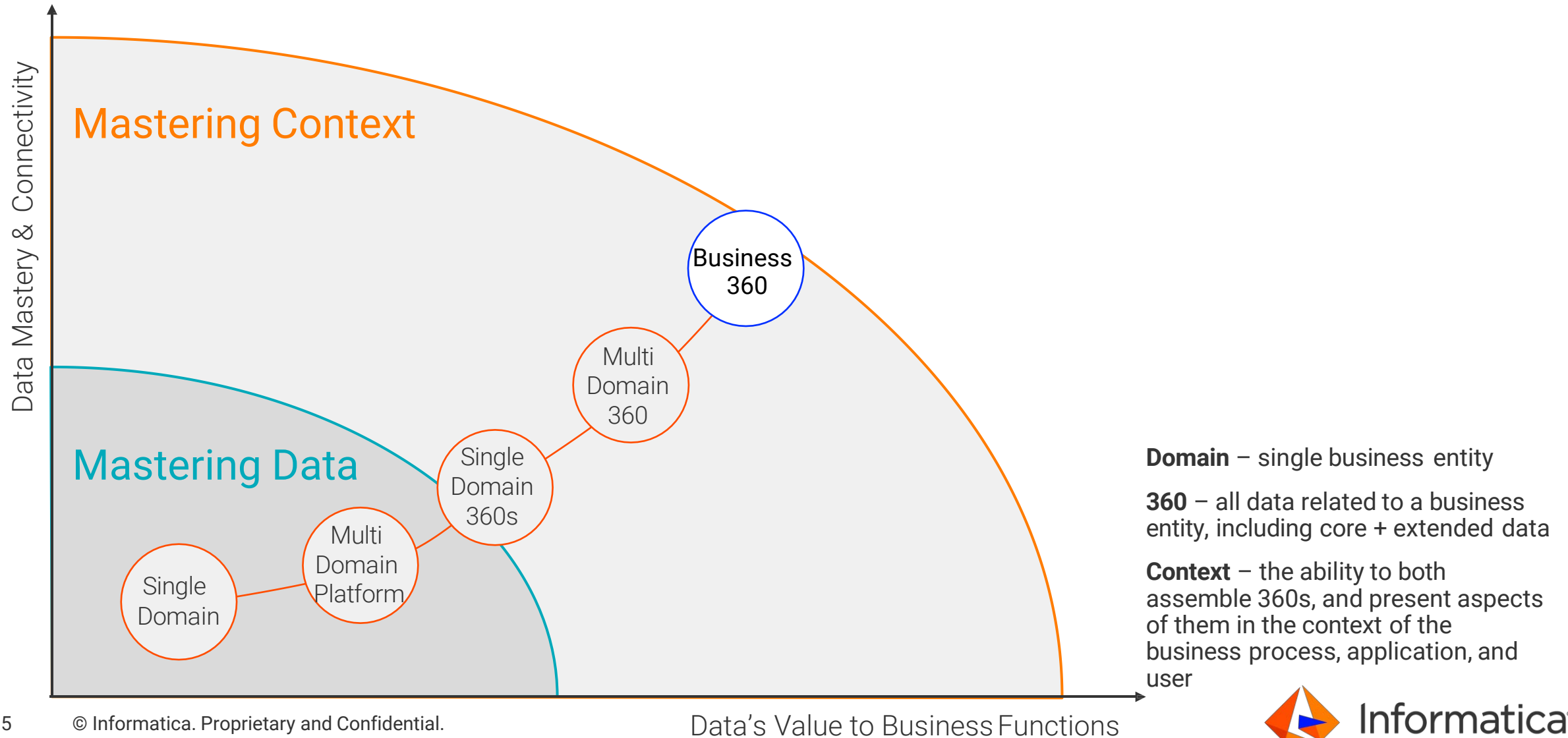
Intended Audience

- MDM Project Sponsors
- Business Users
- Technical Users
- Data Stewards
- MDM Architects
- MDM Developers
- New and Existing Business, Technical users of MDM

Overview



Master Data Evolves to Master Context for Business



The Concept of a 360

‘Customer 360 / MDM Journey’
means having a complete view of
any entity – individual or
organization – and varies by
industry and company



Goal of MDM UI...

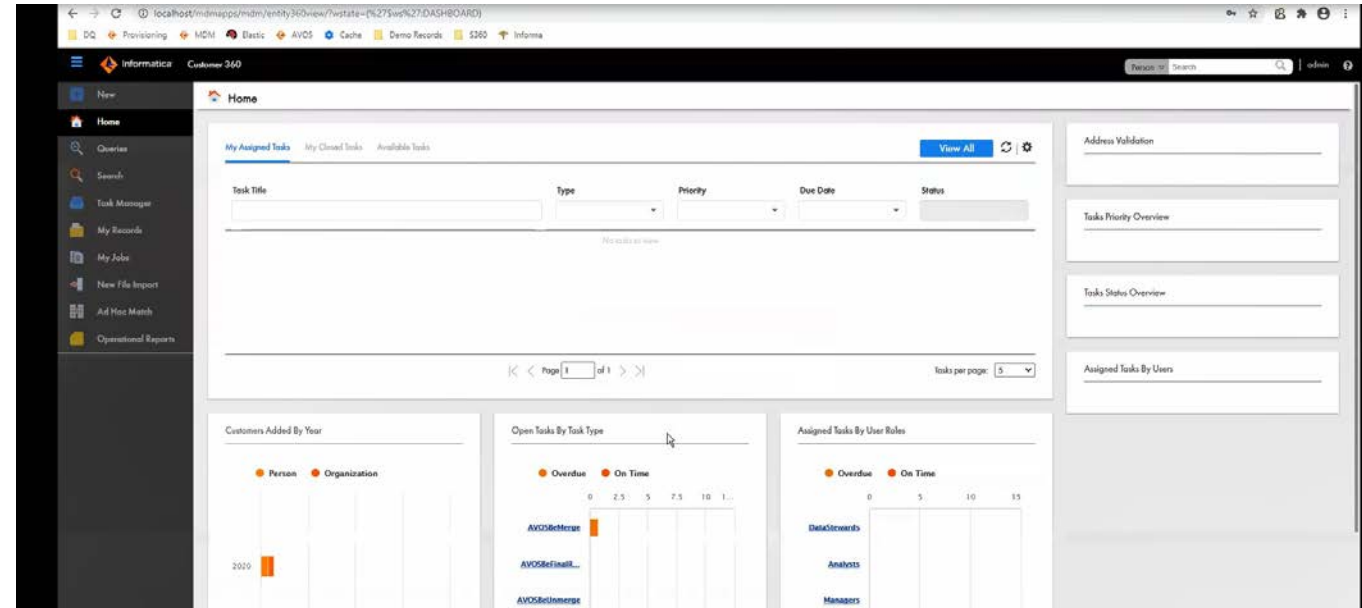
- Improve operational efficiency
- Improve visibility for organization's data
- Improve quality of data
- Increase productivity and insights
- Reduce Cost
- Reduce the risk
- Reduce Manual intervention

UI Components



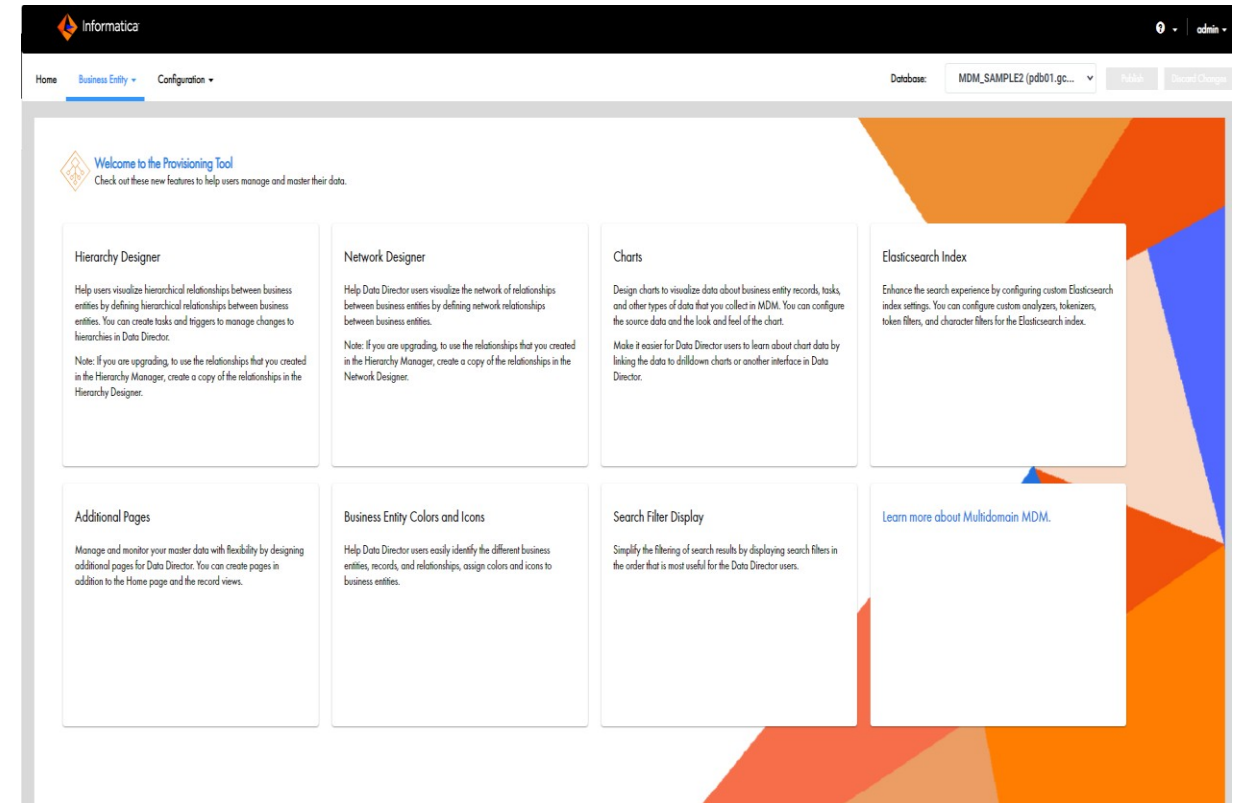
Entity 360

- Configurable web UI for Business Users to master and view data
- Preconfigured 360 Solutions are available for customer, supplier, finance domains
- Can have unlimited depth of descendant records
- Understand Data Stewards' productivity
- Visualize the 360-degree view of BE
- Perform Task Management
- Import files, ad-hoc matches



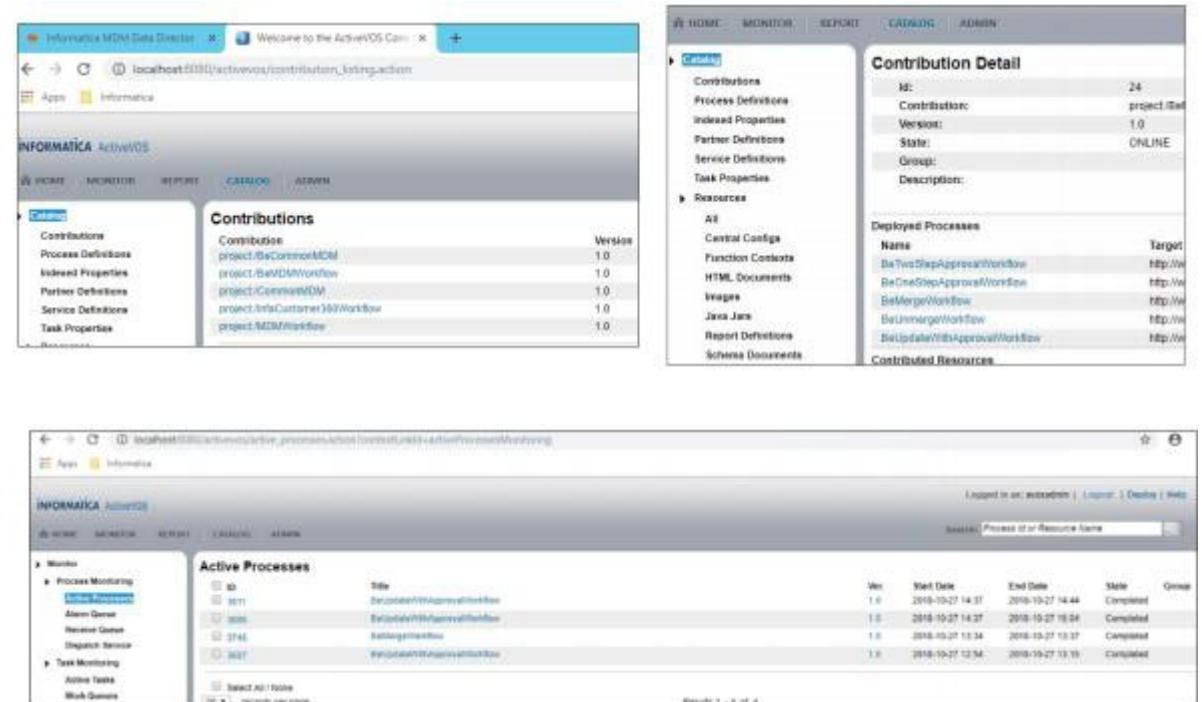
Provisioning UI

- Define new or leverage existing business entity models, tasks and transformations
- Design the UI for e360
- Integrate external components
- Read schema information from ORS



ActiveVOS

- Used for BPM
- Register the workflow engine in the MDM hub
- Use out of the box workflows
- Configure the triggers and map the roles to the tasks from the Provisioning tool
- Check the status of the workflow from the AVOS console



Features

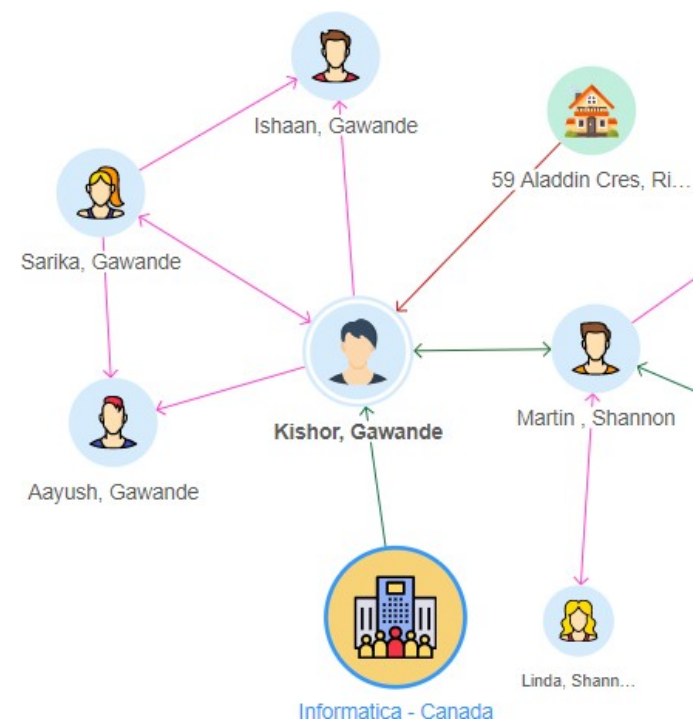


Productive Business users

Workflows



Hierarchy and Network



View Task & Workflow metrics with enhanced KPIs



Data Stewardship @ scale

Find and Replace Records for PersonView

Find in: Find Replace with:

27 Matching Rows Found ☐ Show Matching Rows Only

Marketing Segment	Home Ownership	Number of Children	Last Contact	Membership Code	Score	Bonus Multiplier
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
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Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
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Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
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Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2018-06-13 07:09:02	Bronze	100	1.00

Showing Page 1 of 1
Items Per Page: 20

Task Management @ scale

Task Manager

[My Assigned Tools \(102\)](#)
[My Closed Tools \(17\)](#)
[Available Tools \(1\)](#)
[All Assigned Tools \(102\)](#)
[All Closed Tools \(172\)](#)
[All Tools \(245\)](#)
[Tools Created By Me \(9\)](#)

My Assigned Tools (102)

102 Selected

Select All on This Page

Show Selected Items

Clear All

Assign

Close

Release

Edit

More Actions

<input checked="" type="checkbox"/>	Task Title	Type	Priority	Due Date	Owner	ID
<input checked="" type="checkbox"/>	Review CLOS	Review No approve	Normal	2014-07-31	ng1	un3462-0709
<input checked="" type="checkbox"/>	Review CLOS	Review No approve	Normal	2014-07-31	ng1	un3462-0706
<input checked="" type="checkbox"/>	Review CLOS	Review No approve	Normal	2014-07-31	ng1	un3462-0703
<input checked="" type="checkbox"/>	Review CLOS	Review No approve	Normal	2014-07-31	ng1	un3462-0700
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Skippy	Review No approve	Normal	2014-07-31	ng1	un3462-0757
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Hergen	Review No approve	Normal	2014-07-31	ng1	un3462-0754
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Colten	Review No approve	Normal	2014-07-31	ng1	un3462-0751
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Roy	Review No approve	Normal	2014-07-31	ng1	un3462-0748
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Beasts	Review No approve	Normal	2014-07-31	ng1	un3462-0723
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Tia	Review No approve	Normal	2014-07-31	ng1	un3462-0722
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Perrod	Review No approve	Normal	2014-07-31	ng1	un3462-0719
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Nita	Review No approve	Normal	2014-07-31	ng1	un3462-0716
<input checked="" type="checkbox"/>	Review changes in Person, Kentfield, Connor	Review No approve	Normal	2014-07-31	ng1	un3462-0713

1 - 102 of 102 tools

Tools per page:

File import and match

New File Import Back Next Import

1 Upload file 2 **Fields Mapping** 3 Preview & Import

Map Source columns in your file to destination fields in Business Entities

Source (Dataset for File Smart Import example.csv)

Find Hide Row Preview

Source Columns	Row 1 of first 3
BO_ID	30
FIRST_NAME	MICHAEL
MIDDLE_NAME	F
LAST_NAME	GARMAN
NAME_SUFFIX	Mr
DISPLAY_NAME	MICHAEL GARMAN

Target: Person

System-Applied Field Mappings

To view or edit the field mappings, click a business entity or relationship.

Map Selected Show All Find

Target Field	Source Column Mapper
Last Name	LAST_NAME
Display Name	DISPLAY_NAME
Middle Name	MIDDLE_NAME
Birthdate	
First Name	FIRST_NAME
Image	

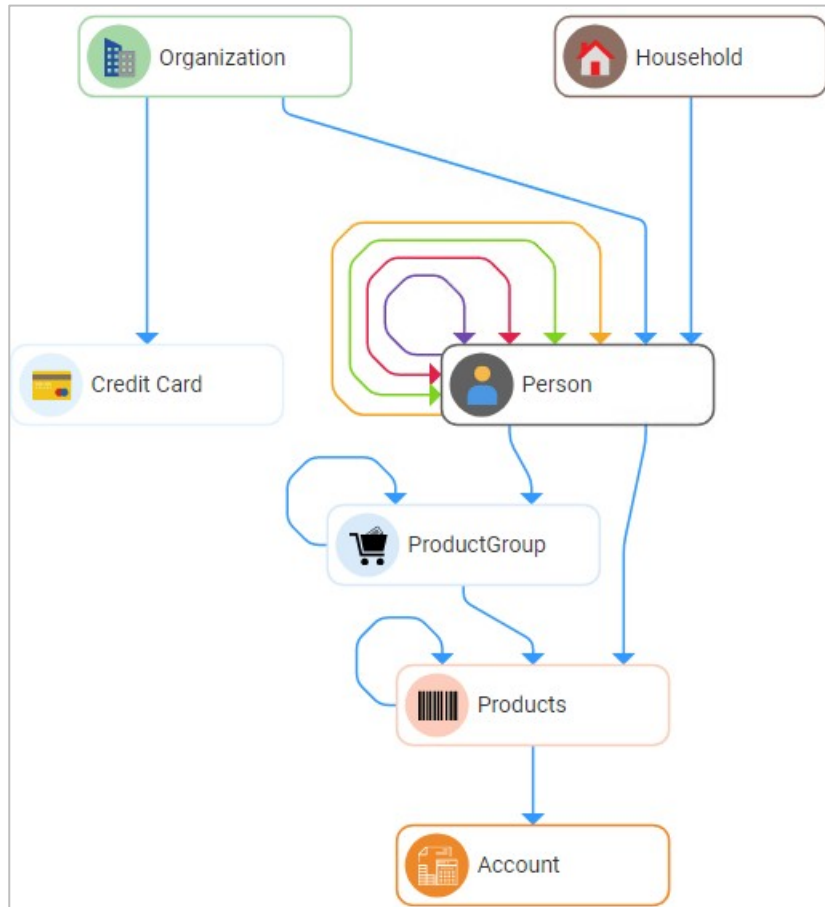
Hierarchy Manager and Network (Relationship Management)

Hierarchy Manager and Network

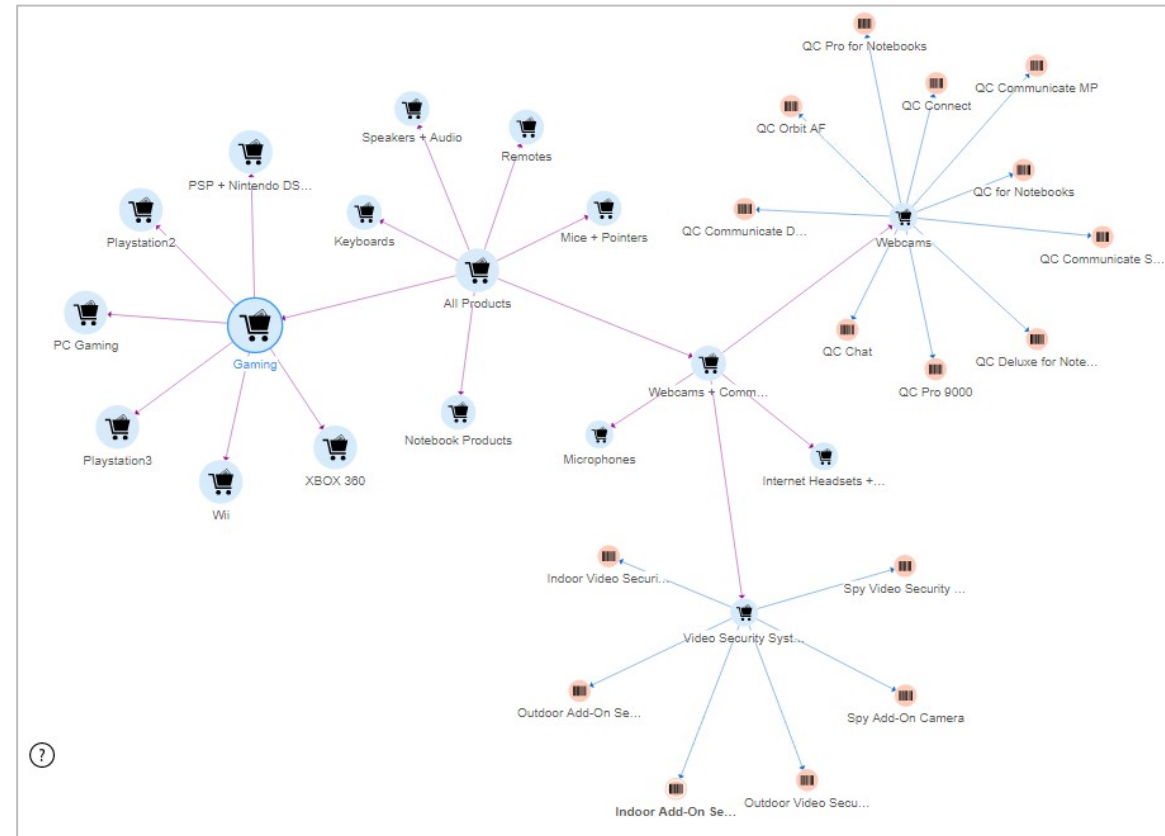
- New and more intuitive configuration interface for hierarchies and networks
- Modern, faster and more user-friendly Hierarchy management user interface
- Ability to handle complex and multi-parent relationships in hierarchy view
- Approval workflows for hierarchy changes, with side-by-side comparison of changes
- New and fast-to-explore Network view
- Ability to configure network relationships based on user data
- Ability to copy Hierarchy Manager relationship as hierarchy and network relationships

Network

Network Designer in Provisioning Tool

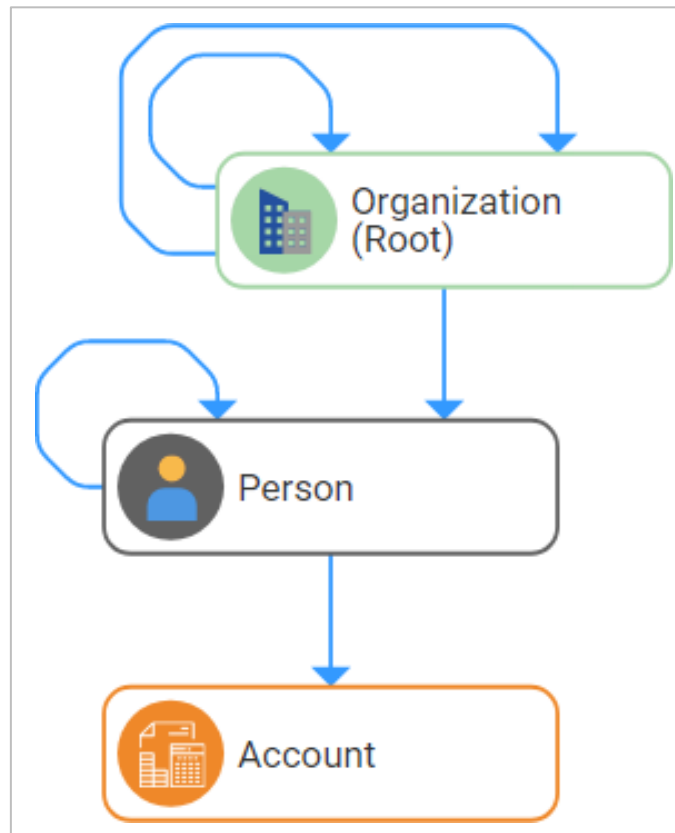


Network View in Entity 360

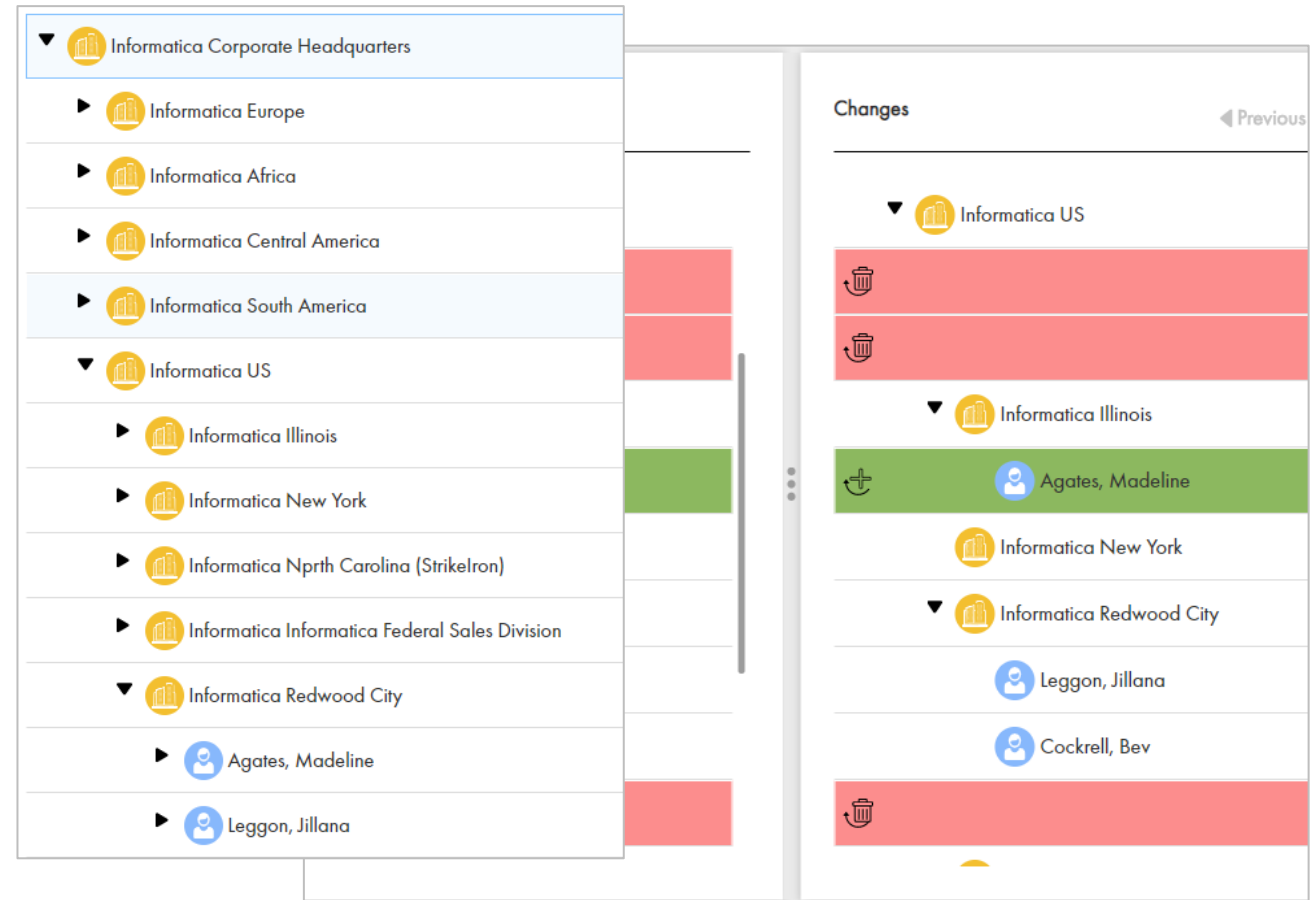


Hierarchy

Hierarchy Designer in Provisioning Tool

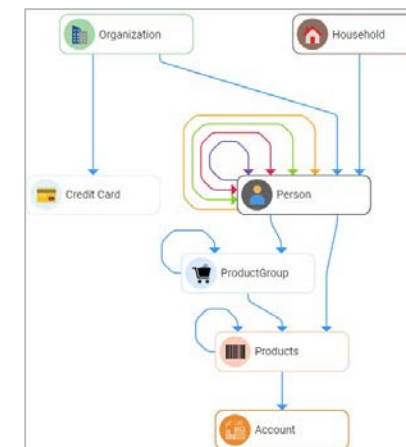
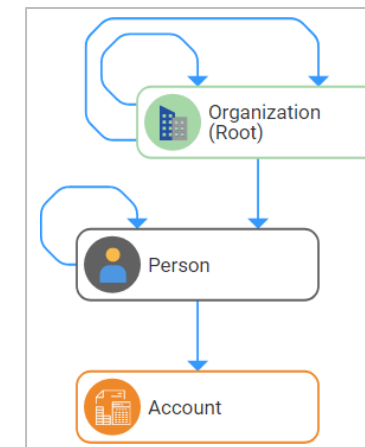
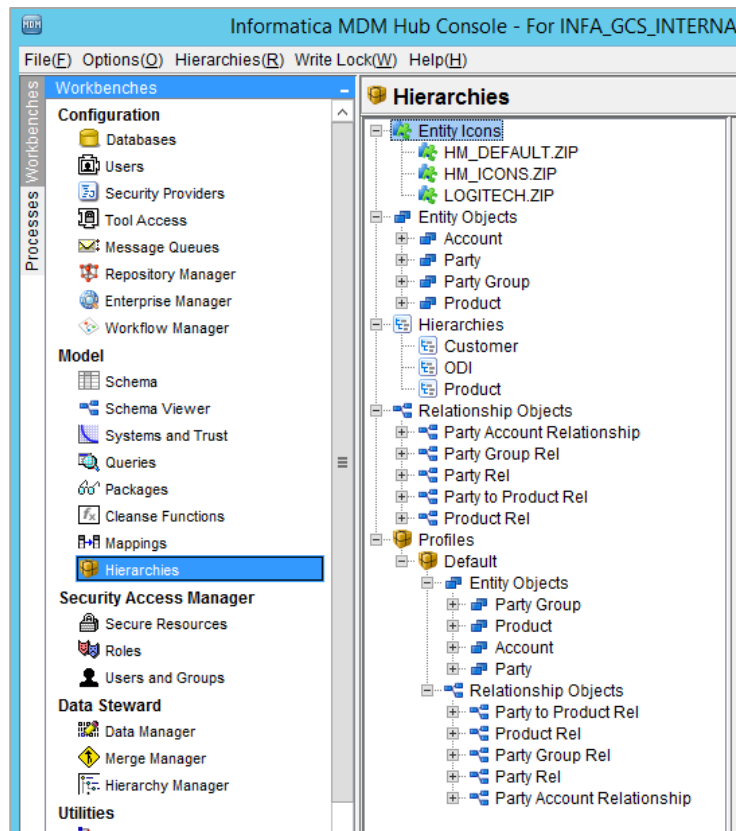


Hierarchy View in Entity 360



Copy Hierarchy Manager Relationships

Out of the box tool to copy existing Hierarchy Manager (HM) configuration as new Hierarchy and Network relationships



File Import and File Match

Smart File Import and Match

- CLAIRE powered: intelligent file structure discovery for file import & match
 - Quickly Load and process external data fast with minimal effort:
 - Recognizes the structure of input file: headers, data
 - Automated mapping recommendation using quick data profiling to Minimize the Mapping efforts
 - Suggests mapping to BE

The screenshot displays the 'New File Import' interface in Informatica, specifically the 'Fields Mapping' step. The interface is divided into three main sections: 'Source Columns', 'Target Field', and 'System-Applied Field Mappings'.

Source Columns: A table showing the source data columns and their values for 'Row 1 of first 5'.

Source Columns	Row 1 of first 5
BO_ID	30
FIRST_NAME	MICHAEL
MIDDLE_NAME	F
LAST_NAME	GARMAN
NAME_SUFFIX	Mr
DISPLAY_NAME	MICHAEL GARMAN

Target Field: A table showing the target fields and their corresponding source column headers.

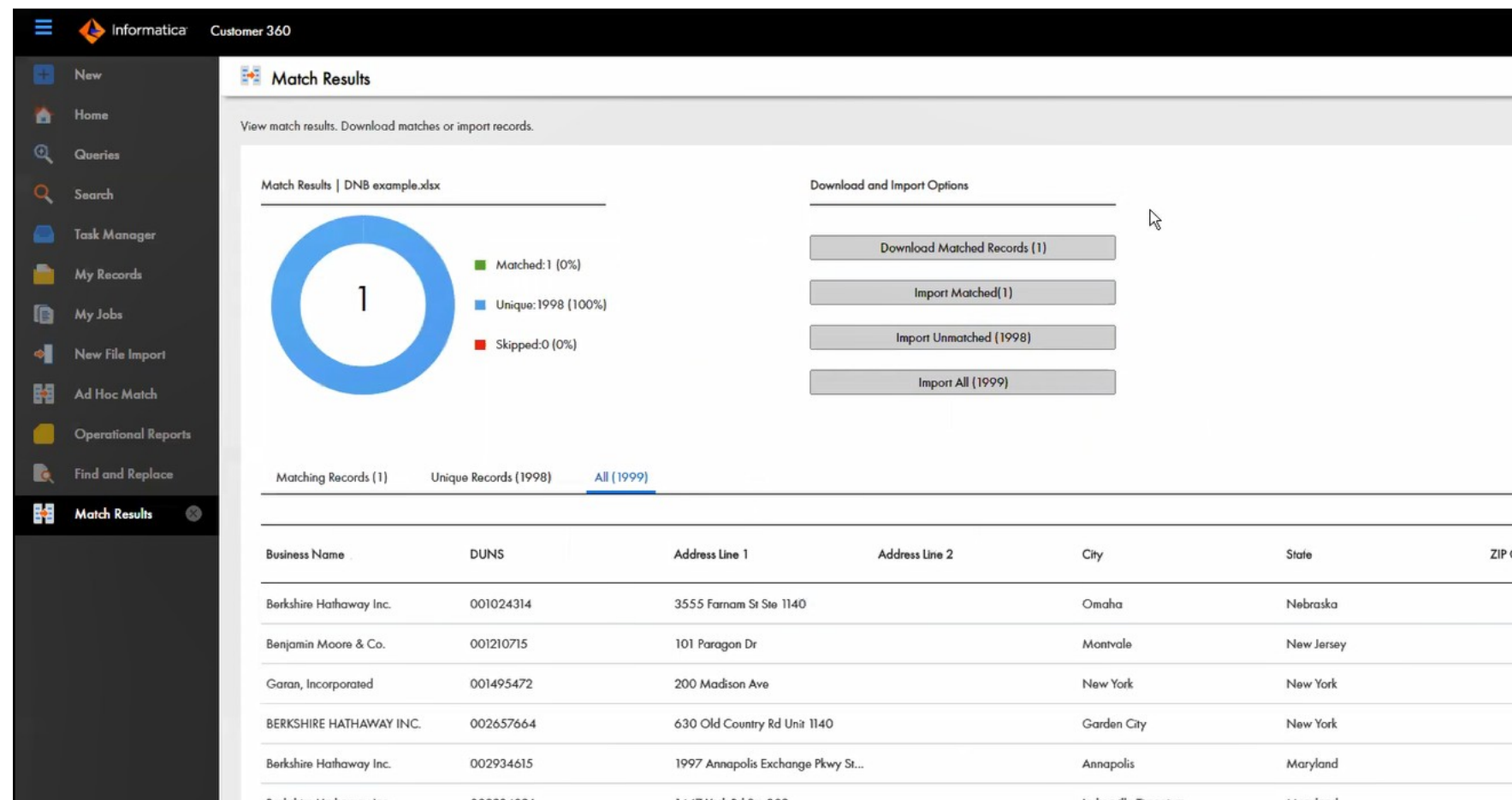
Target Field	Source Column Header
Last Name	LAST_NAME
Display Name	DISPLAY_NAME
Middle Name	MIDDLE_NAME
Birthdate	
First Name	FIRST_NAME
Image	

System-Applied Field Mappings: A section providing instructions on how to view or edit field mappings by clicking a business entity or relationship.

The interface also includes navigation buttons at the top: '<Back', 'Next>', and 'Import'. The 'Fields Mapping' step is highlighted in the progress bar.

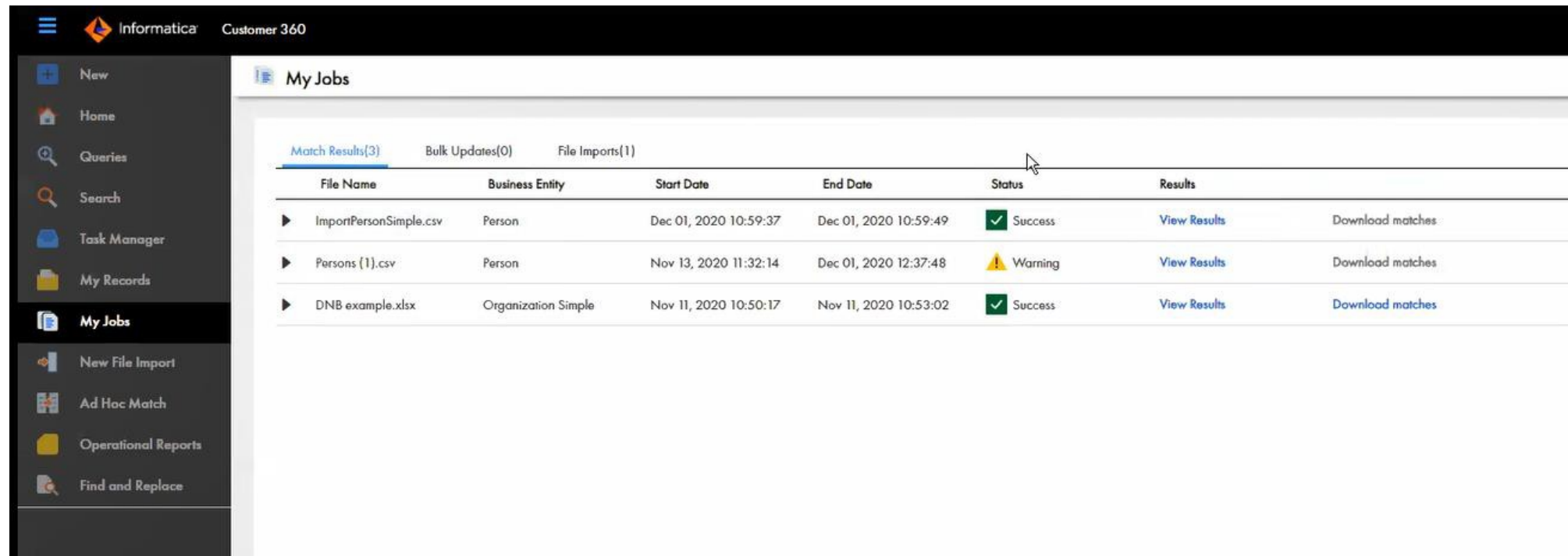
Smart File Import and Match

- Match Business Entities data before import



Smart File Import and Match

- Job Monitor – Provides control, history and actions for imported data



The screenshot displays the Informatica Customer 360 Job Monitor interface. On the left is a dark sidebar with navigation options: New, Home, Queries, Search, Task Manager, My Records, and My Jobs (selected). Below My Jobs are links for New File Import, Ad Hoc Match, Operational Reports, and Find and Replace. The main area is titled 'My Jobs' and shows a table of file imports. Above the table are tabs for Match Results(3), Bulk Updates(0), and File Imports(1). The table has columns for File Name, Business Entity, Start Date, End Date, Status, and Results. Three rows are visible, each with a play button icon on the left and 'View Results' and 'Download matches' links on the right.

File Name	Business Entity	Start Date	End Date	Status	Results
▶ ImportPersonSimple.csv	Person	Dec 01, 2020 10:59:37	Dec 01, 2020 10:59:49	✓ Success	View Results Download matches
▶ Persons {1}.csv	Person	Nov 13, 2020 11:32:14	Dec 01, 2020 12:37:48	⚠ Warning	View Results Download matches
▶ DNB example.xlsx	Organization Simple	Nov 11, 2020 10:50:17	Nov 11, 2020 10:53:02	✓ Success	View Results Download matches

Data Stewardship @ Scale

Bulk Edit

- Mass data updates to simplify changes
- Find and Replace
- Job monitor page is used to track the bulk updates

Find and Replace Records for PersonView

Find in: Replace with:

21 Matching Rows Found ☐ Show Matching Rows Only

Marketing Segment	Home Ownership	Number of Children	Last Contact	Membership Code	score	Bonus Multiplier
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
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Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
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Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
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Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00
Special Offer Tier 2			2019-06-13 07:09:02	Bronze	100	1.00

1 - 20 of 21

Items Per Page:

Bulk Workflow and Tasks

- Task management, assignment, actions @ scale
 - Task inbox to find, act, and complete required tasks faster
 - Smart Search for Tasks and Filters: Find all tasks for specific user, refine by Priority
 - Bulk assignment and actions
 - New Grid layout to analyze and act faster, Tasks preview

The screenshot shows the 'Task Manager' interface. On the left, a list of tasks is displayed under 'My Assigned Tasks (100)'. A task is selected, and a context menu is open with options: 'Select All on This Page', 'Show Selected Items', 'Clear All', 'Assign', 'Claim', 'Release', 'Edit', and 'More Actions...'. The main panel shows the details for the task 'Review changes in Person: Smith, John (Task ID: urn:b4p2:26303)'. It includes a 'Record Details' section with a sidebar for 'Quickly scroll to:' (Person, Emails, PhoneNumbers, Addresses, Person Details) and an 'Overview' section with fields for Party Type, Last Name, First Name, Display Name, Middle Name, Birthdate, and Remarks. Below this is a table for 'Emails (2)' with columns for 'Is Valid Ind', 'Opt In Ind', 'Electronic Address', and 'Electronic Address Type'.

The screenshot shows the 'Task Manager' interface in a grid view. A list of tasks is displayed under 'My Assigned Tasks (100)'. A context menu is open over the first few rows, showing options: 'Select All on This Page', 'Show Selected Items', 'Clear All', 'Assign', 'Claim', 'Release', 'Edit', and 'More Actions...'. The grid has columns for 'Task Title', 'Type', 'Priority', 'Due Date', 'Owner', and 'ID'. The tasks listed are all 'Review changes in Person' tasks with a 'Normal' priority and a due date of '2019-07-31'. The bottom of the interface shows a pagination bar with '1 - 100 of 100 tasks' and a 'Tasks per page: 100' dropdown.

Intelligent Match Rules, Charts

Intelligent Match Rule Generation

1 Define

2 Train

3 Preview

A high confidence score indicates that the prediction of

Match Confidence Meter

Match Training Session: 22 Jan 2020, 10:22 Continue Training

Matching Records - 3.08% (32)

Unique Records - 96.92% (1414)

All Records (1459)

Confidence %	Last Name	Full Name	DOB	First Name	SSN	Email	Phone			
100	Robinson	Barry Robinson	1937-07-09T00:00:00+05:30	Barry	634-66-2041	Maecenas.ornare.egestas@Doneclectusaliquet.net	1-546-161-4924	251-5811 Sed St.	Gboko	5309
100	Perry	Hyacinth Perry	2014-05-29T00:00:00+05:30	Hyacinth	789-20-0646	nec.urna@egetmetusIn.edu	1-614-962-4751	679-6609 Phasellus Street	Zandvoorde	45-294
100	Shepherd	Madonna Shepherd	1957-04-20T00:00:00+05:30	Madonna	767-45-7635	Morbi.vehicula@nasceturridiculus.ca	1-869-186-8397	P.O. Box 829, 1644 Etiam Rd.	Posina	91-593
100	Conner	Indira Conner	1971-03-07T00:00:00+05:30	Indira	969-49-7868	urna@mi.net	1-786-781-3210	Ap #982-1941 Nonummy Avenue	Castor	3611 QQ
100	Hall	Lareina Hall	1975-05-14T00:00:00+05:30	Lareina	444-30-0197	neque.tellus@egetipsumSuspendisse.net	1-982-115-9432	P.O. Box 800, 701 Dis St.	Edmonton	80452

Match Training

Our match engine has identified 10 pairs of records. Review each pair and set it to one of the following states:
Match - if the records are same, Not Sure - if you are not sure whether the records are same, Not a Match - if the records are not same.

✓ Match? Not Sure✗ Not a Match

Last Name	Full Name	DOB	First Name	SSN	Email	Phone
Williams Daniel	Martena Williams Daniel	2006-03-16T00:00:00+05:30	Martena	230-17-5365	ligula.consectetuer@urnasuscipitnonummy.edu	1-459-329-03
Daniel	Martena Daniel	2006-03-16T00:00:00+05:30	Martena	230-17-5365	ligula.consectetuer@urnasuscipitnonummy.edu	1-459-329-03

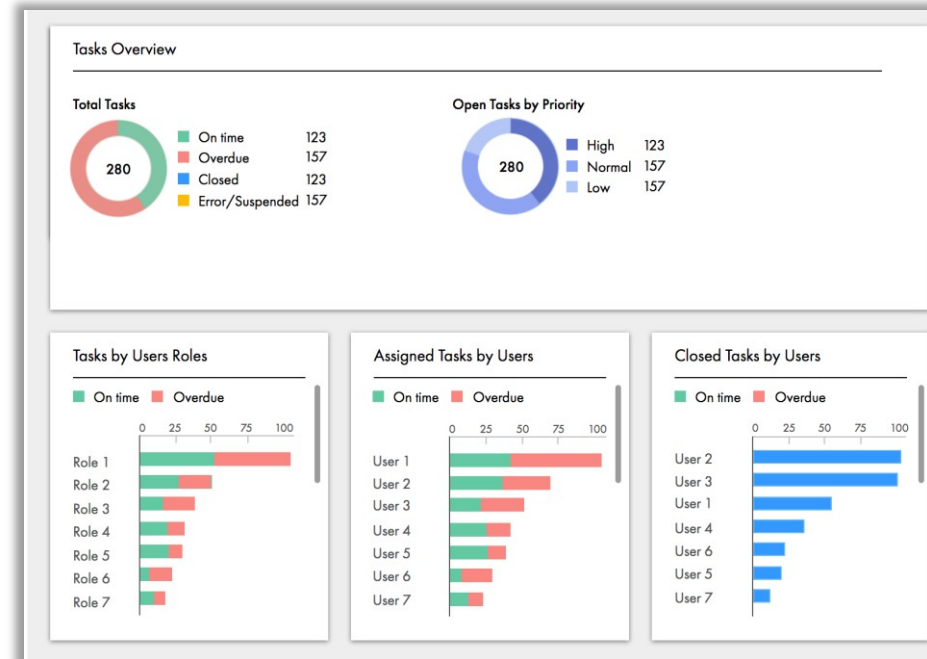
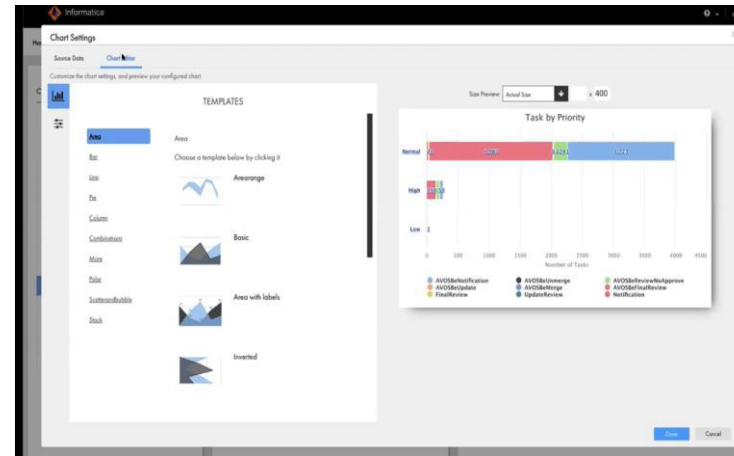
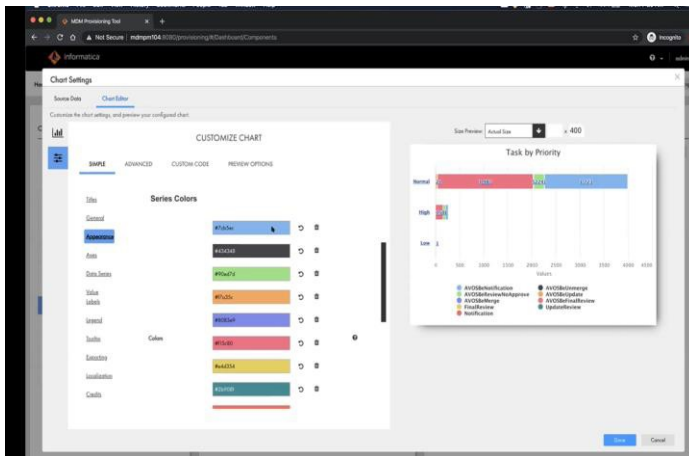
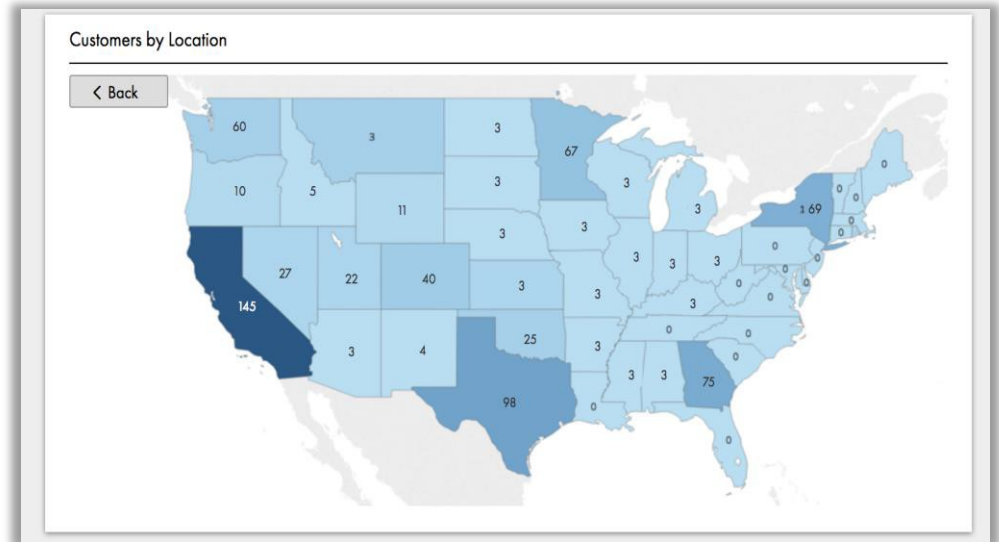
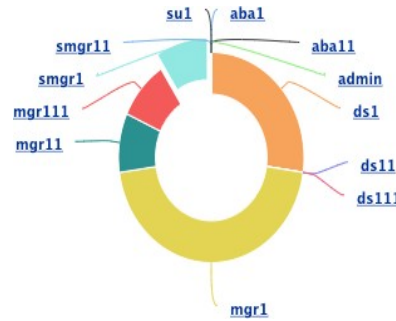
Data Pairs 1 of '10' 1 2 3 4 5 6 7 8 9 10

POWERED BY **CLAIRE™**

Show Match Results

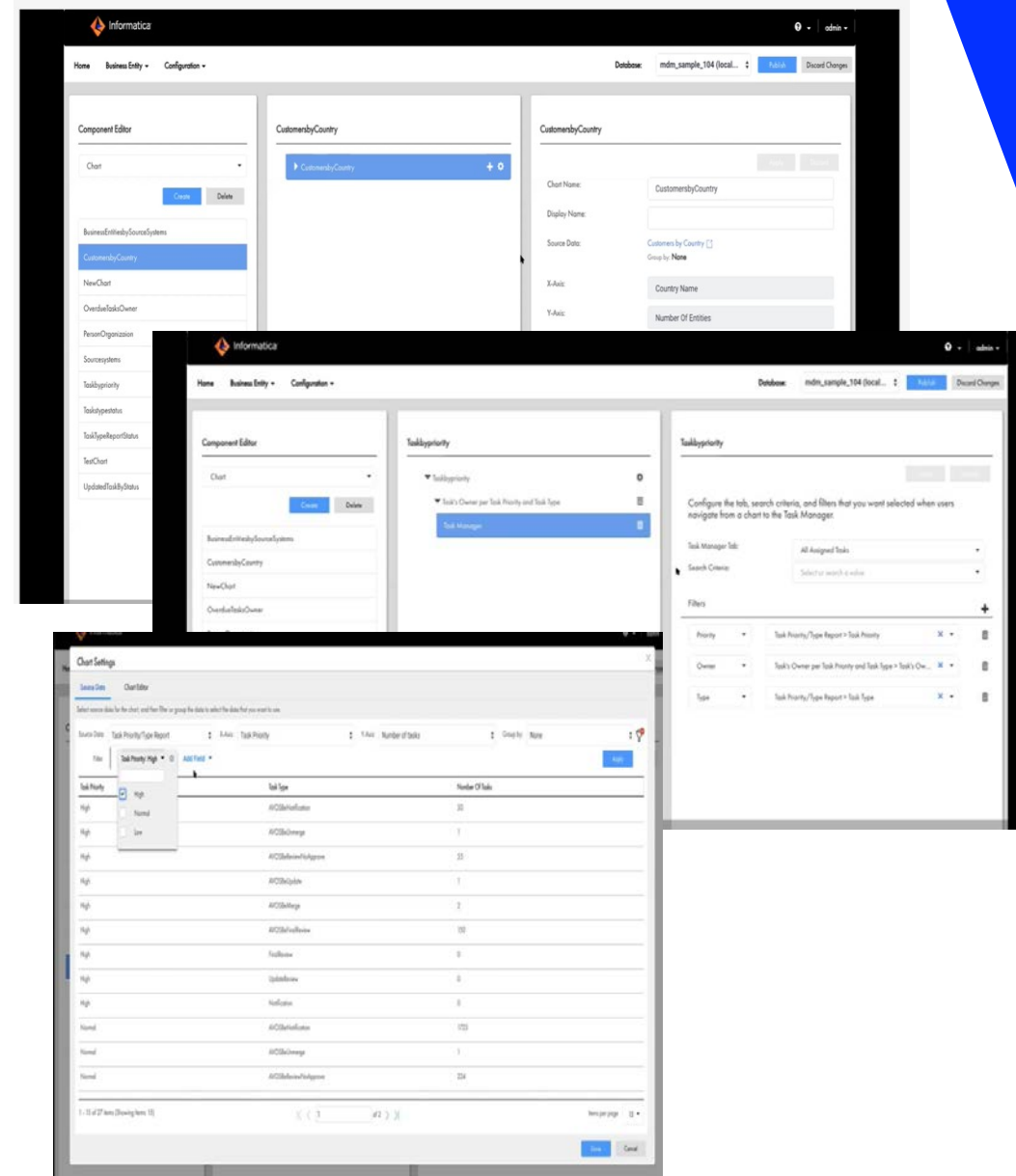
Charts

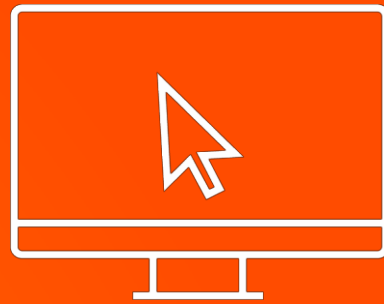
- Analyze and Act on data faster
 - Nine out of box charts provided
 - Aggregation and Drilldowns
 - Search, Queries, Filters
 - Full Configuration: Types, Colors



Charts

- Create Charts without writing any code
 - Predefined out of box reports
 - Create charts from out-of-the-box and custom reports
 - Customize the charts using the powerful Highcharts engine
 - Layout charts on to the Screen
- Drill down into your charts
 - Report definitions contain drill down information
 - Can configure drill downs during Chart provisioning
 - No restriction to number of drill downs that can be supported
- Built in Navigation for a quick access to data
 - Create navigation links to Task Manager, Search and Queries
 - Navigation links are contextual





Demo

More MDM Tech Tuesday webinars...

- MDM Workflow Management Using ActiveVOS

<https://www.youtube.com/watch?v=JrstpWQkU3k&feature=youtu.be>

- Migration from Subject Area to Entity 360 in MDM

https://www.youtube.com/watch?v=29be_7cwunU&feature=youtu.be

- Master Data Management using Business Entity Service model

<https://www.youtube.com/watch?v=kQHTI2zFTas&feature=youtu.be>

- MDM Smart Search

https://www.youtube.com/watch?v=8S4P9cj_q5U&feature=youtu.be

- MDM Performance Best Practices

<https://www.youtube.com/watch?v=2By3561owMA&feature=youtu.be>

- and more at our Success portal: <https://success.informatica.com/explore/tt-webinars.html>

Conclusion

- Expose the Mastered data to Business consumers, make business users productive and data stewards efficient by making use of the available features at 10.4
- Enable business owners to make the right decisions at the right time for the respective domains
- Demonstrate tangible business value to monetize 360 Solutions before, during and after the implementation

Have a successful MDM journey.....

Questions?



Jothi Venkatesan

Principal Customer Success Technologist

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Thank You!
