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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.

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Feature Rich Success Portal

Bootstrap trial and POC Customers

Enriched Customer Onboarding experience

Product Learning Paths and Weekly Expert Sessions
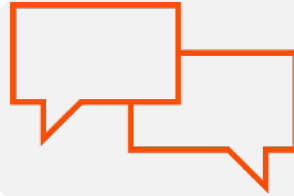
Informatica Concierge with Chatbot integrations
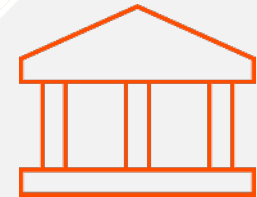
Tailored training and content recommendations

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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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Agenda

- Overview

- User Interface Components

- Features

- Demo

- Conclusion

- Q&A

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Intended Audience

- MDM Project Sponsors

- Business Users

- Technical Users

- Data Stewards

- MDM Architects

- MDM Developers

- New and Existing Business, Technical users of MDM

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Overview

Master Data Evolves to Master Context for Business

Data Mastery & Connectivity

Mastering Context

Business 360

Multi Domain 360

Single Domain 360s

Mastering Data

Multi Domain Platform

Single Domain

Data's Value to Business Functions

Domain – single business entity

360 – all data related to a business entity, including core + extended data

Context – the ability to both assemble 360s, and present aspects of them in the context of the business process, application, and user

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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

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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
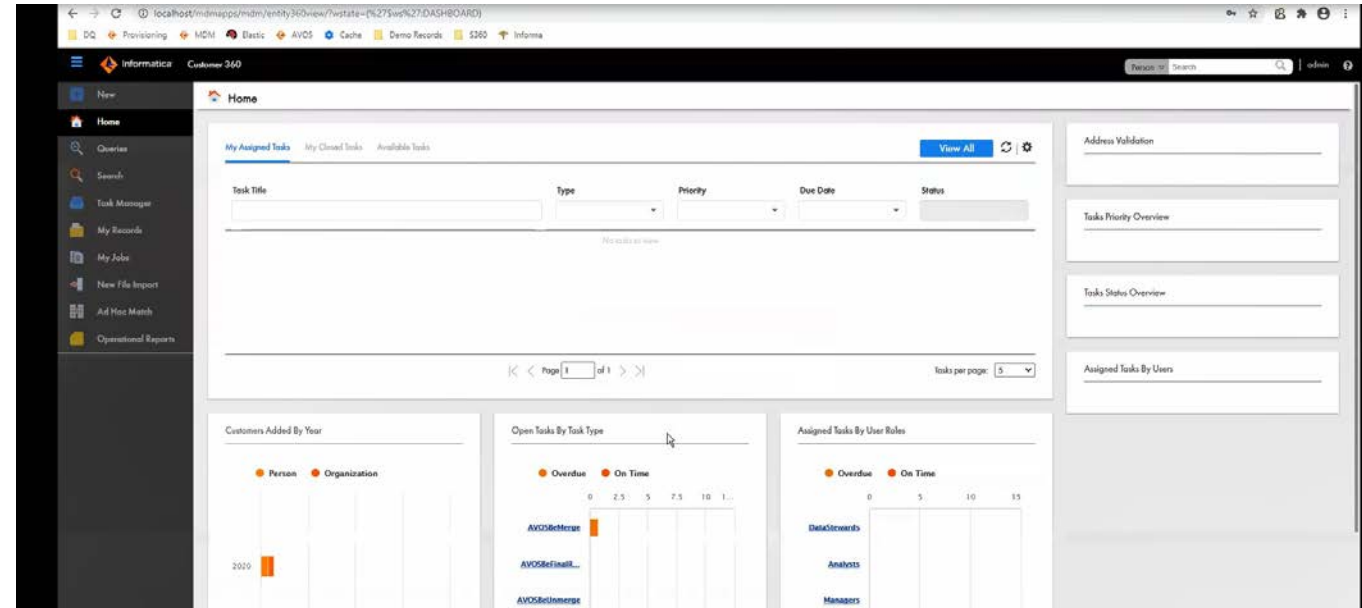
Provisioning UI

- Define new or leverage existing business entity models, tasks and transformations

- Design the UI for e360

- Integrate external components

- Read schema information from ORS
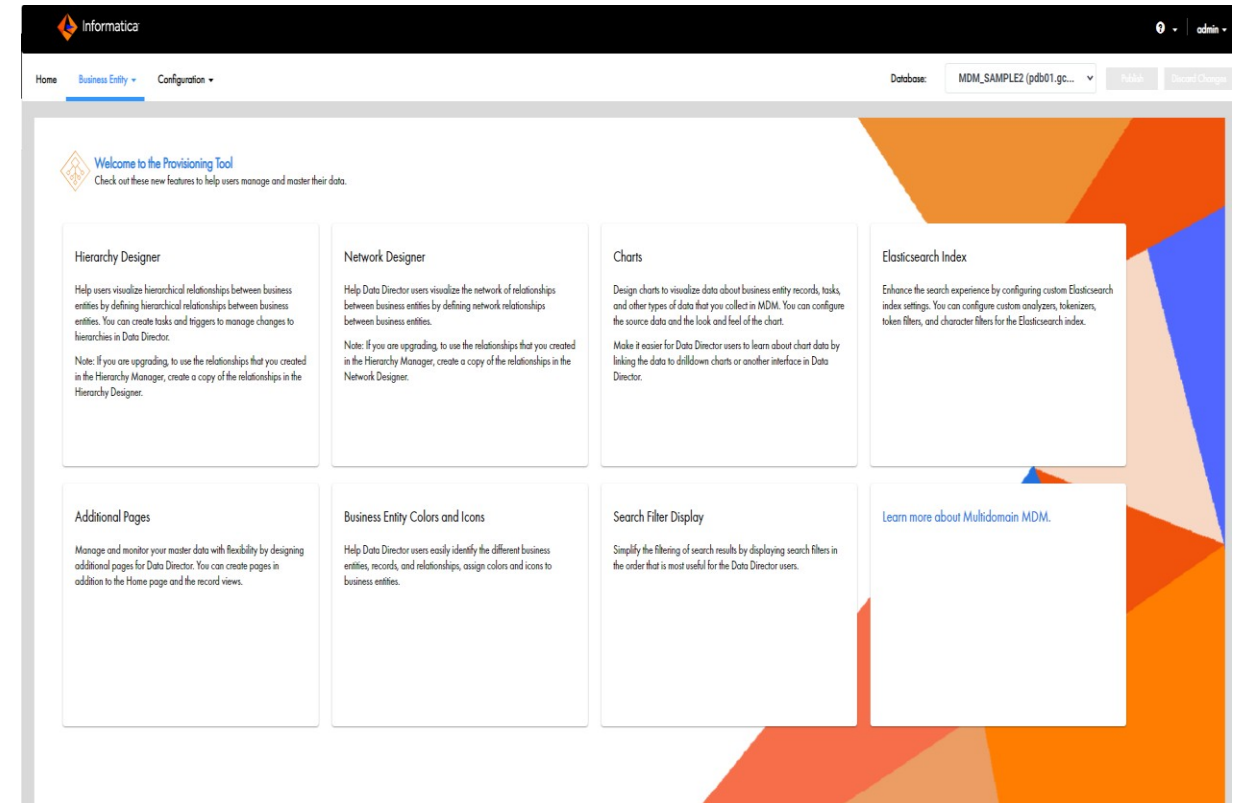
ActiveVOS

- 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

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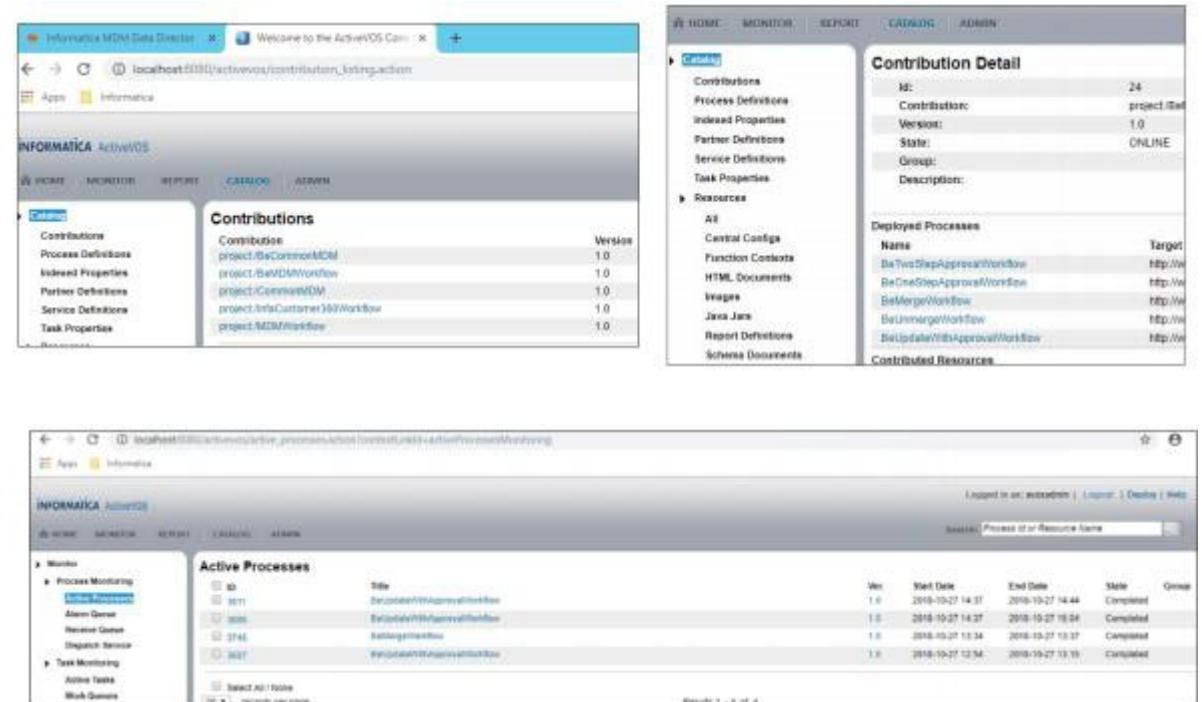
Features

Productive Business users

Workflows

Hierarchy and Network
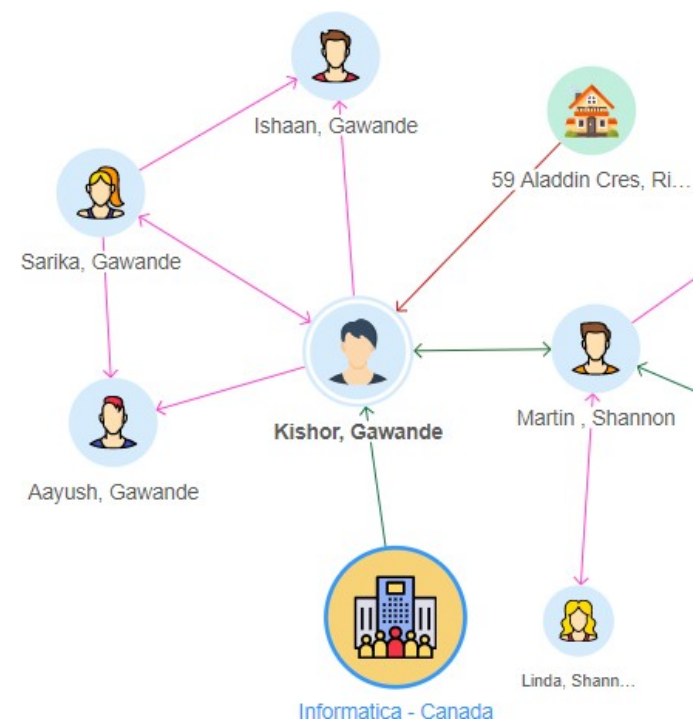
View Task & Workflow metrics with enhanced KPIs

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Efficient Data Stewards

Data Stewardship @ scale

Task Management @ scale

File import and match

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

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Network

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Hierarchy

Hierarchy Designer in Provisioning Tool
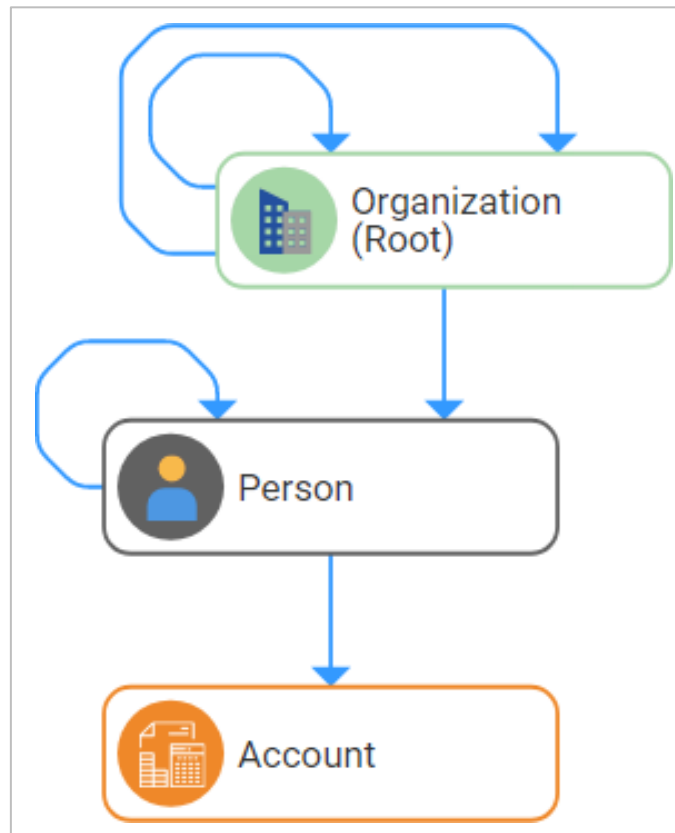
Hierarchy View in Entity 360

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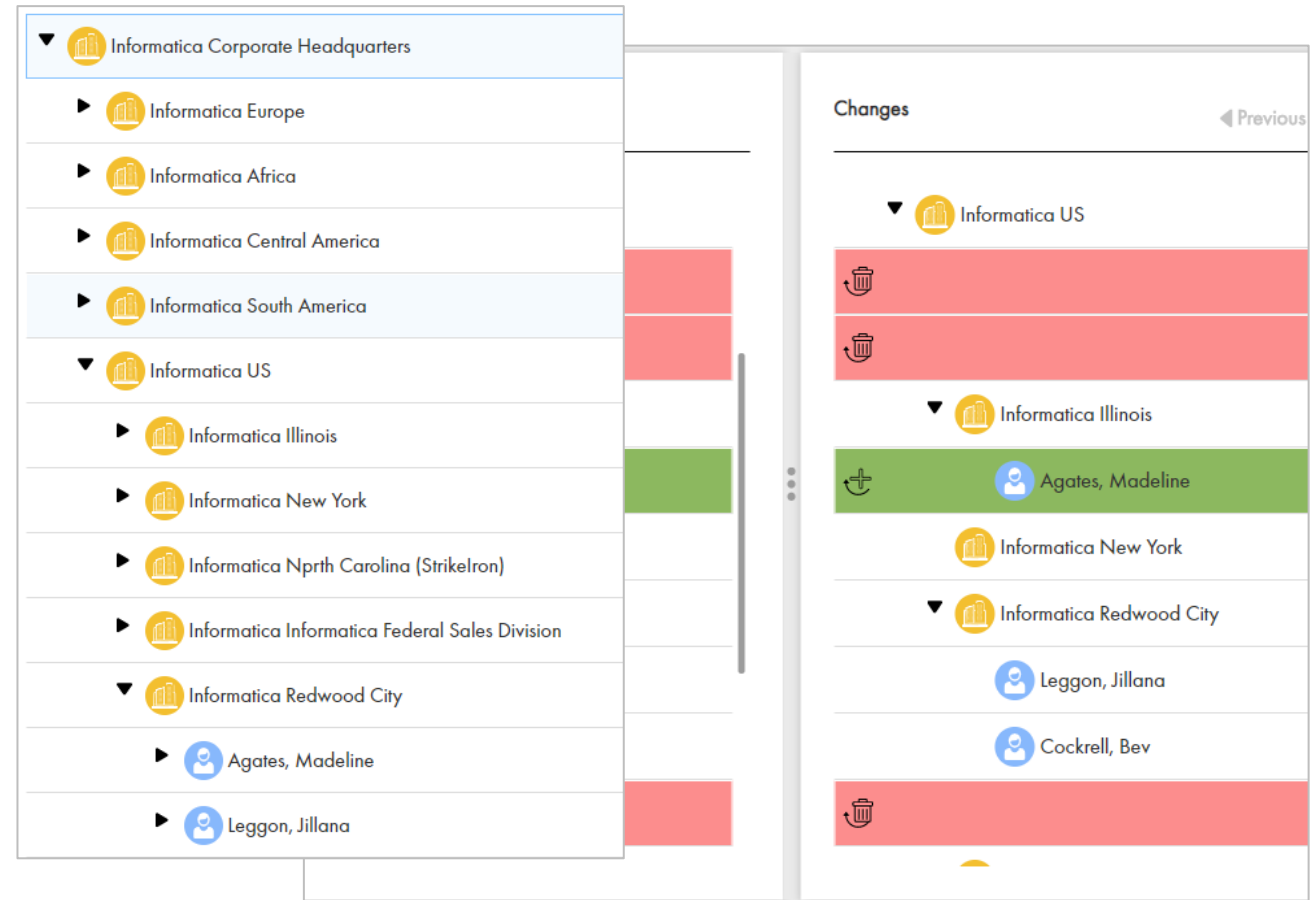
Copy Hierarchy Manager Relationships

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

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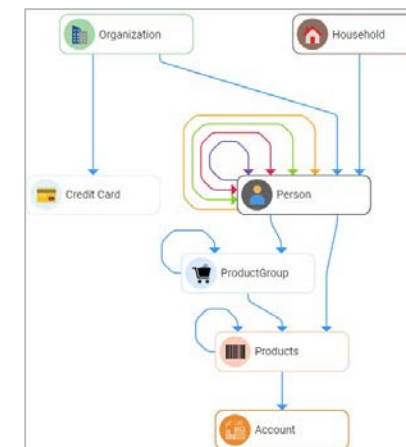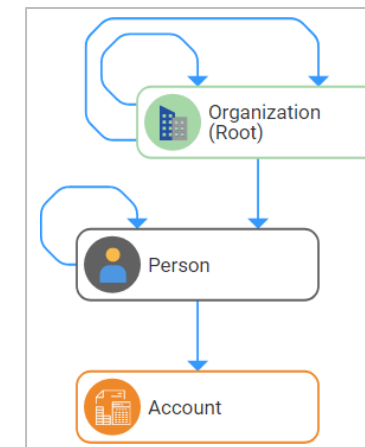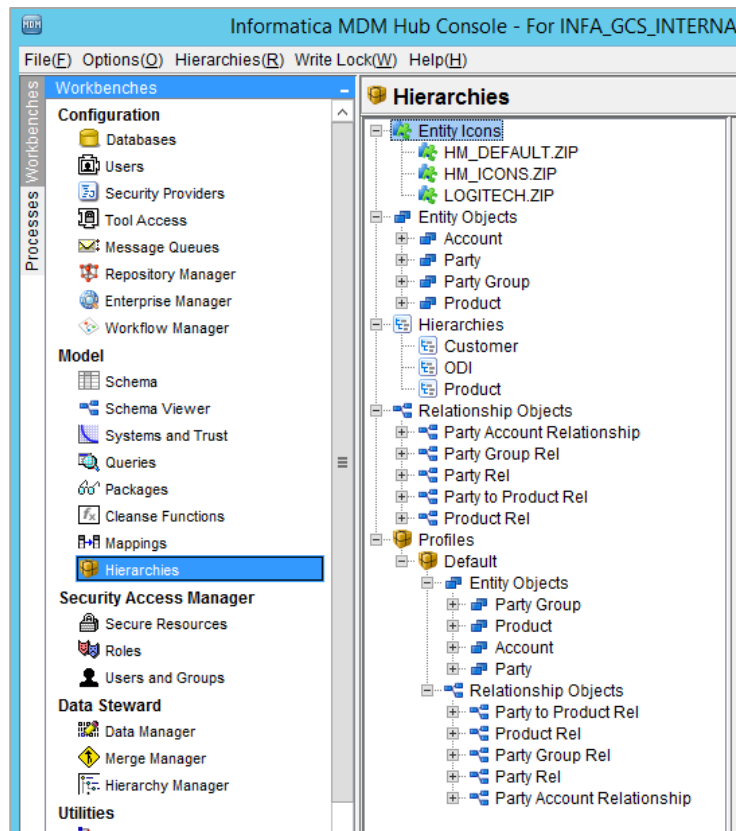
File Import and File Match

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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

Smart File Import and Match

- Match Business Entities data before import

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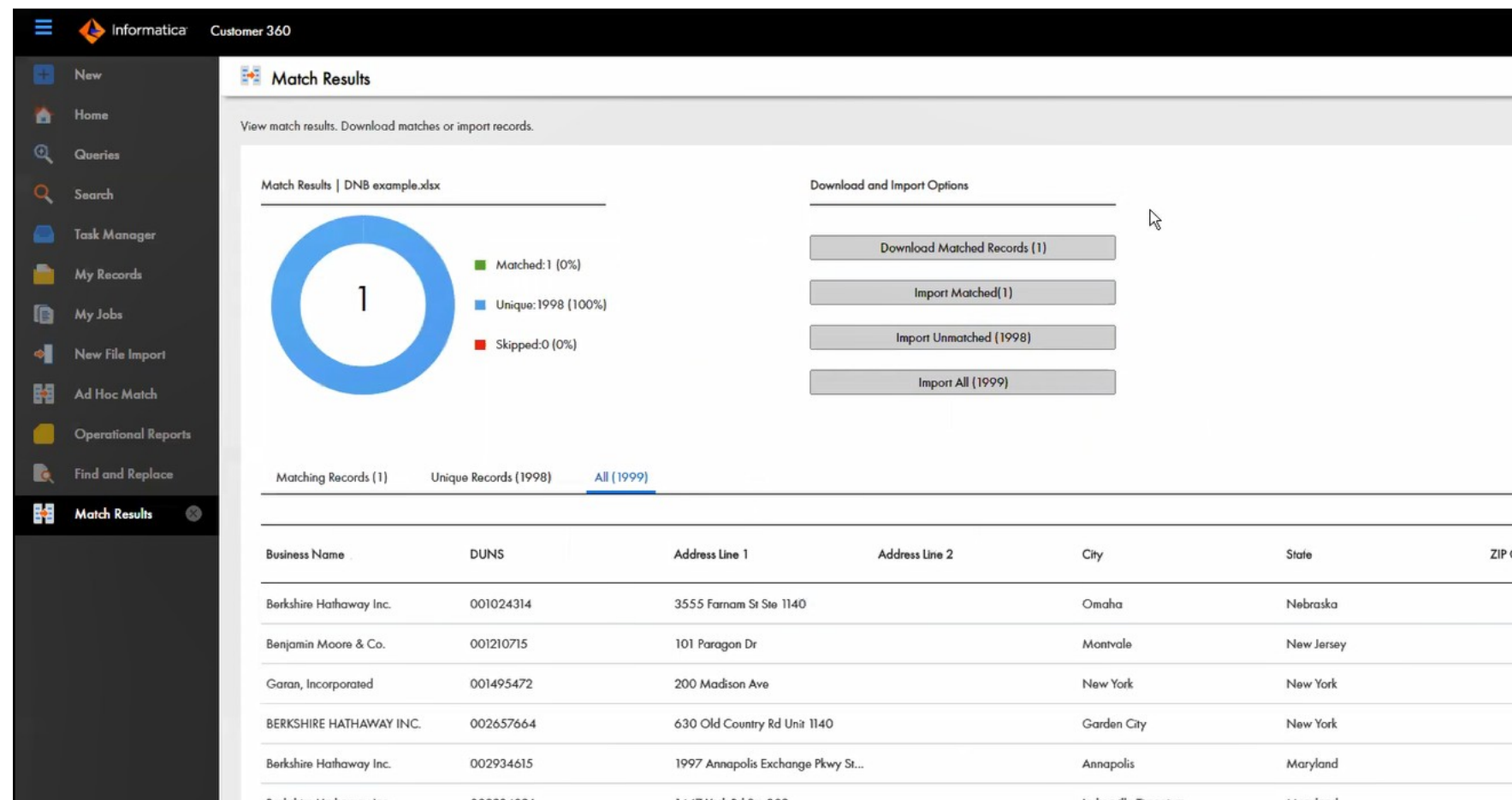
Smart File Import and Match

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

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Data Stewardship @ Scale

Bulk Edit

- Mass data updates to simplify changes

- Find and Replace

- Job monitor page is used to track the bulk updates

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

Intelligent Match Rules, Charts

Intelligent Match Rule Generation

Charts

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

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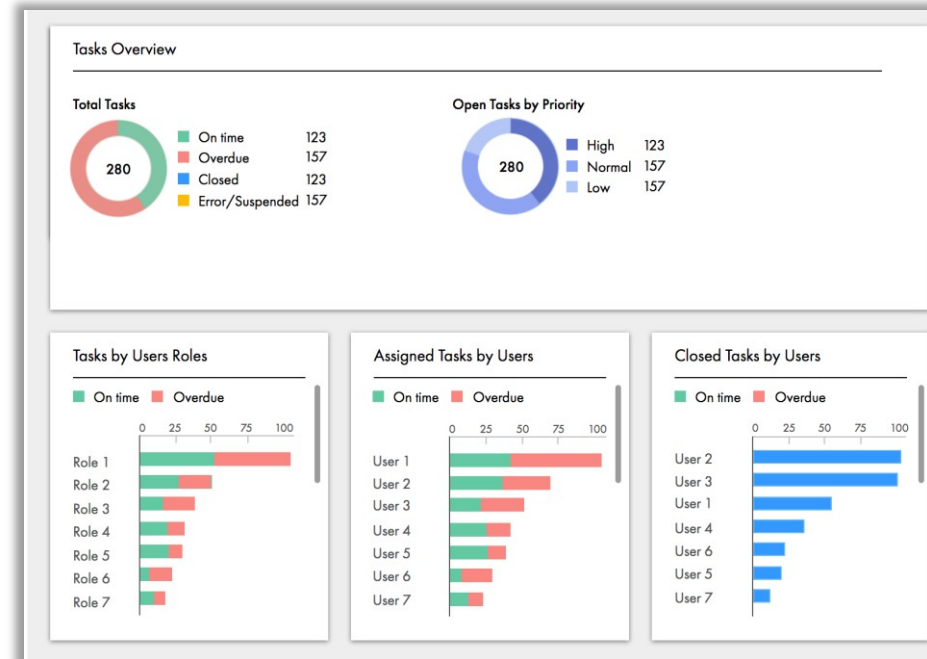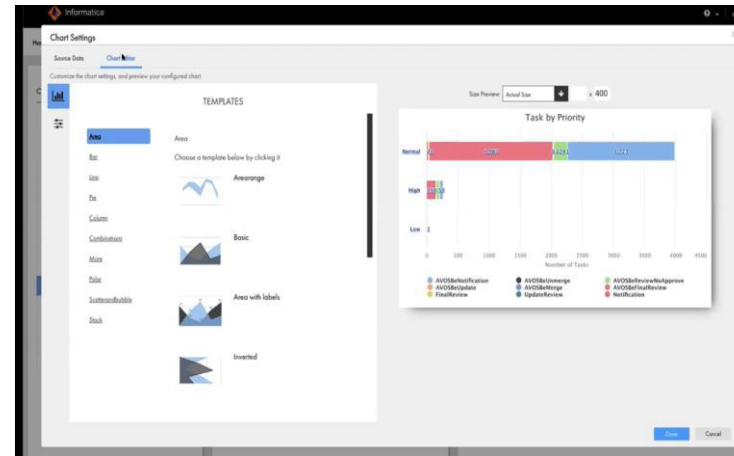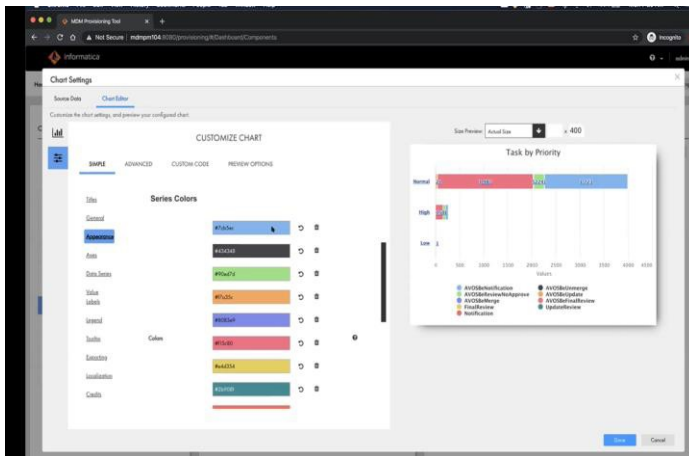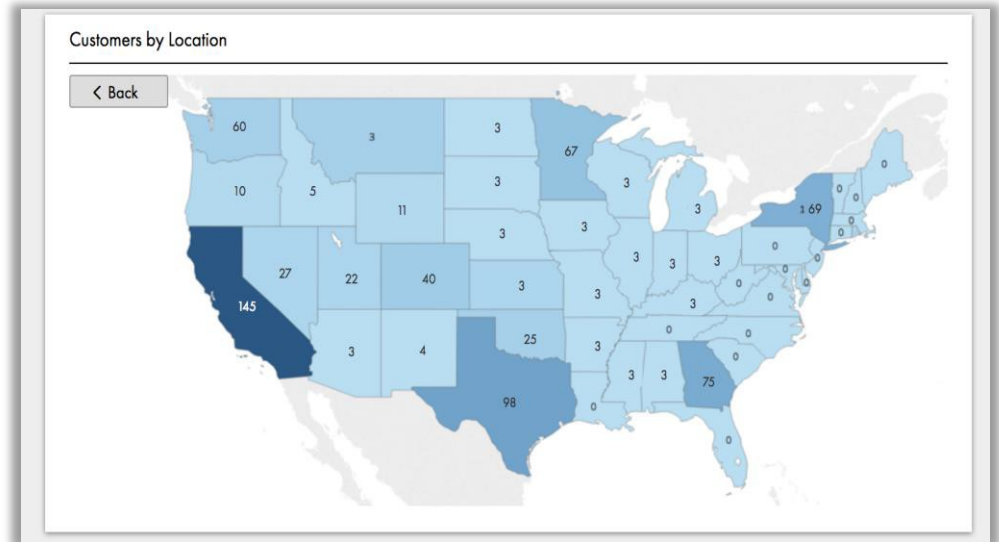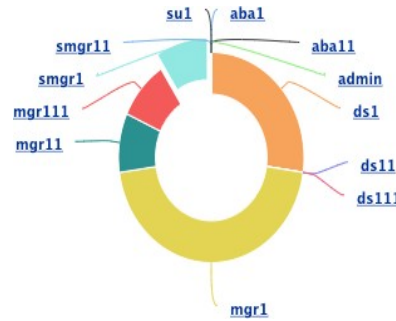
Charts

- 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
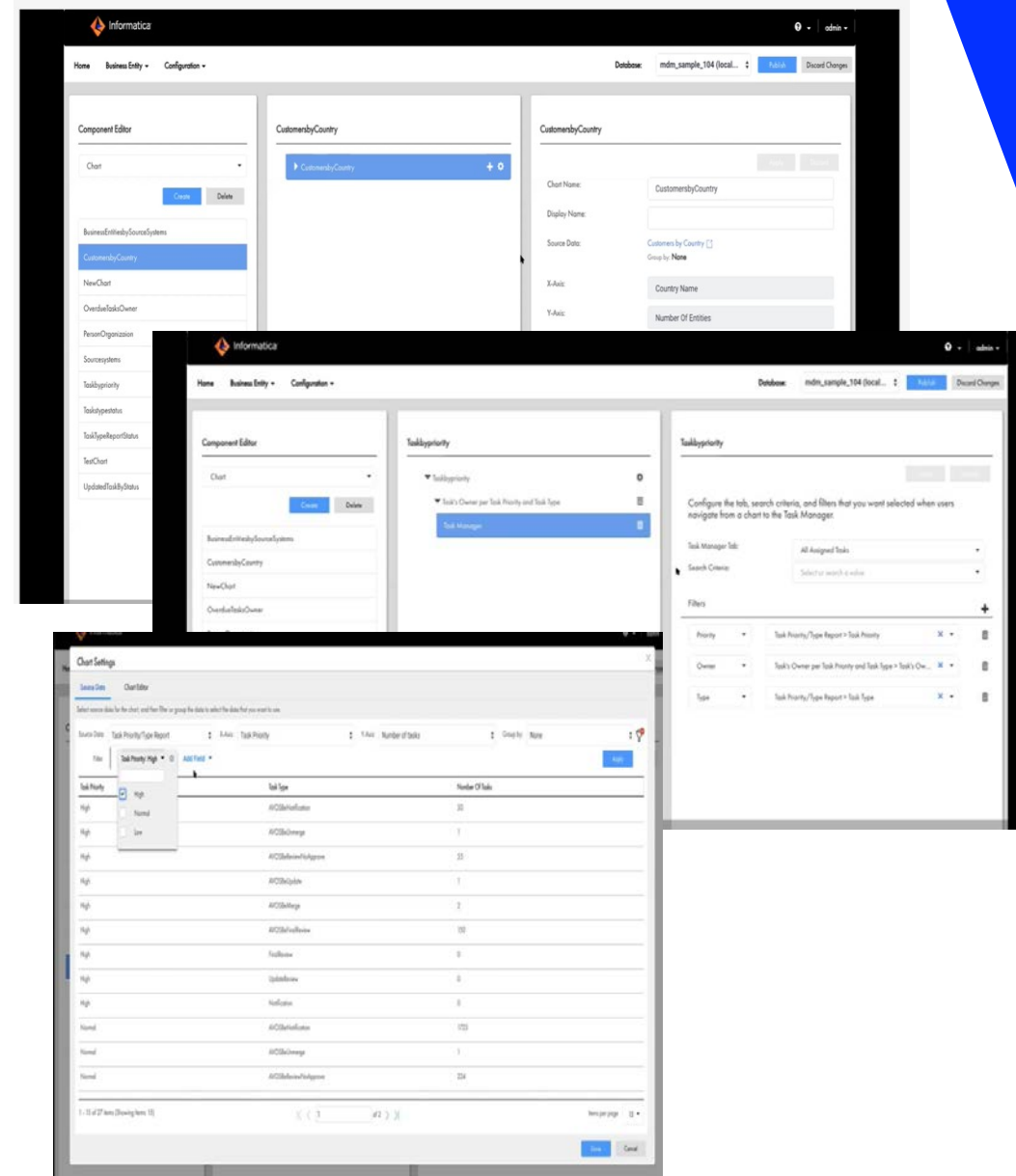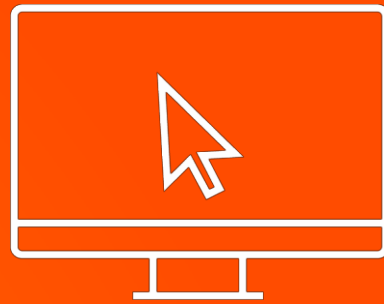
Demo

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…..

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Questions?

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Thank You!