

24 Feb, 2026

Master Data Governance with CDGC - Part 2

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Where data & AI come to 

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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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Agenda

Introduction

Technical overview of MDM data scanning in Informatica CDGC

Scanning MDM SaaS & Reference 360 assets in CDGC

Visualizing master data and Reference 360 assets

Exploring data lineage and metadata management

Integrating scanned data with business assets for governance

Live demo: scanning, visualization, and lineage in CDGC

Q&A

Introduction to Informatica MDM SaaS Cataloging

Informatica MDM SaaS is a cloud-native, multidomain Master Data Management solution hosted on the Informatica Intelligent Data Management Cloud (IDMC) platform that enables organizations to centralize, cleanse, govern, and synchronize critical master data across any domain including customer, product, supplier, and industry-specific entities to create a "golden record" or single, trusted source of truth that drives consistent decisions, reliable analytics, and confident downstream consumption across the organization.

Cataloging Informatica MDM SaaS in CDGC gives your enterprise a single, authoritative view of how mastered data is structured, governed, and transformed, turning Business Entities, hierarchies, DQ rules, match logic, and survivorship strategies into fully traceable, discoverable, and auditable assets that power end-to-end lineage, impact analysis, and compliance—essentially elevating MDM from a backend mastering engine into a transparent, governed data product that the entire organization can trust and rely on.

MDM SaaS is deeply interconnected with other IDMC services, especially Reference 360, Cloud Data Integration and DQ. These services actively participate in the creation, enrichment, and movement of master data. Therefore, when cataloging MDM SaaS, it becomes essential to also catalog the related assets from these services to establish complete lineage and deliver accurate governance insights.

Informatica MDM SaaS Key Terminologies

Data Model

- Define Business Entities, Attributes, Reference Data, Relationships, and Hierarchies. Configure Data Quality rules, Match model, and Survivorship logic

Business Entities

- Real-world objects mastered in MDM (e.g. Customer, Product, Supplier, Location). Contain **attributes** that describe the entity.

Attributes

- Fields that **define entity** details (e.g. Name, Email, Address, SKU)

Reference Data

- Standardized value lists used in picklists (e.g. Countries, Currency Codes, Cost Centers). Managed in **Reference 360**

Relationships

- Logical **associations** between business entities (e.g. Customer–Account, Product–Supplier)

Hierarchies

- Represent relationships between business entities in a **tree-like structure** (e.g. Organization → Person)

Data Quality

- Rules to validate, cleanse, standardize, transform, and enrich data. Examples: trim spaces, standardize phone, create full name from first and last name

Match & Merge

- **Match Rules** identify duplicates. **Merge Rules** consolidate matched records into one

Survivorship

- Logic to select the most trusted attribute values when merging. Produces the **Golden Record**

Golden Record

- The single, trusted, complete version of a business entity record

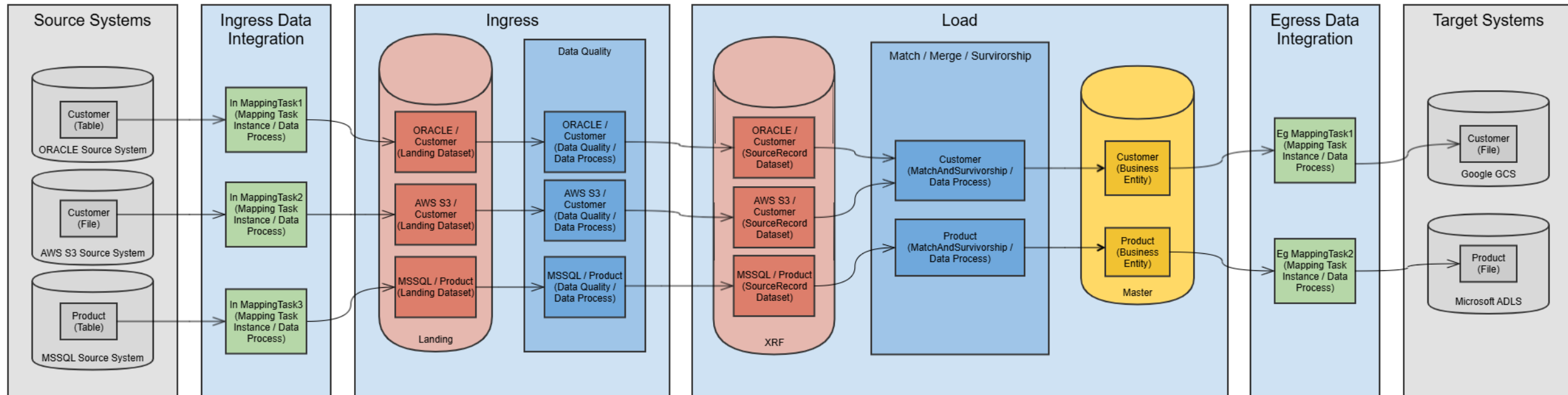
Ingress Job

- Data Integration jobs that loads data **into** MDM SaaS from external systems

Egress Job

- Data Integration jobs that publishes mastered data **out** of MDM SaaS to downstream systems

High-Level MDM Process Flow & CDGC Lineage Representation



Technical overview of MDM data scanning in CDGC (1/2)

Catalog source of type **Informatica Intelligent Cloud Services** can be used for cataloging assets from Data Integration, MDM SaaS, and Reference 360 source systems.

Following asset types are cataloged from the MDM SaaS source system:

Specify metadata filters: No Yes

> Show supported wildcards and examples

Include Metadata	Data Integration	All Types
Include Metadata	MDM SaaS	Business Entity
Include Metadata	MDM SaaS	Relationship
Include Metadata	MDM SaaS	Hierarchy
Include Metadata	Reference 360	Code List
Include Metadata	Reference 360	Hierarchy

MDM SaaS

- Attribute
- Business entity
 - A business Entity can be used in mapping tasks as sources or targets.
- Calculation
- Data Quality
- Data Quality Calculation
- Field
- Folder
- Hierarchy Field
- Hierarchy Instance
- Hierarchy Relationship
- Landing Data Set
- Landing Field
- Mapping
 - ETL (Extract Transform Load) Mapping
- Mapping task
- Mapping task instance
- Match and Survivorship
- Match and Survivorship Calculation
- MDM Hierarchy
- MDM Relationship
- Project
- Relationship Field
- Source Record Data Set
- Source Record Field
- Source System
- Source System Folder
- System field

Technical overview of MDM data scanning in CDGC (2/2)

Catalog source of type **Informatica Intelligent Cloud Services** can be used for cataloging assets from Data Integration, MDM SaaS, and Reference 360 source systems.

Following asset types are cataloged from the Reference 360 source system:

Specify metadata filters: ? No Yes

> Show supported wildcards and examples

Include Metadata	▼	Data Integration	▼	All Types	▼
Include Metadata	▼	MDM SaaS	▼	Business Entity	▼
Include Metadata	▼	MDM SaaS	▼	Relationship	▼
Include Metadata	▼	MDM SaaS	▼	Hierarchy	▼
Include Metadata	▼	Reference 360	▼	Code List	▼
Include Metadata	▼	Reference 360	▼	Hierarchy	▼

Reference 360

- Code list
- Crosswalk
- Hierarchy
- Hierarchy data set
- Mapping
 - ETL (Extract Transform Load) Mapping
- Reference data set
- Mapping task
- Mapping task instance

Key MDM SaaS Assets and their Catalog View (1/5)

Assets Maintaining Project/Folder Structure

The screenshot shows the Informatica Business 360 Console interface. The top navigation bar includes the Informatica logo, 'Business 360 Console', and a search bar. Below the navigation bar, the 'Explore' view is active, showing a list of projects under 'All Projects'. The 'TT_MDM_Workspace' project is selected and highlighted with a red box. A blue box highlights a table of assets within this workspace. A red arrow points from the 'TT_MDM_Workspace' header to the 'TT_MDM_Customer' catalog view on the right. A blue arrow points from the 'Person' asset in the table to its corresponding entry in the catalog view.

Name	Type	Updated On	D. T. S. J. W P.
Customer Oracle	Source System	Feb 5, 202...	
Customer-SQLServer	Source System	Feb 5, 202...	
Egress Person to Snowflake	Job Definition	Feb 6, 202...	
Ingress Person from Oracle	Job Definition	Feb 5, 202...	
Ingress Person from SQLServer	Job Definition	Feb 6, 202...	
Match Person	Job Definition	Feb 10, 20...	
Oracle	Source System	Feb 5, 202...	
Person	Business Entity	Feb 13, 202...	
Person Search Layout Default	Component	Feb 6, 202...	
Person View Edit Layout Default	Page	Feb 6, 202...	
Search Index Person	Job Definition	Feb 10, 20...	

The screenshot shows the Informatica Data Governance and Catalog interface. The top navigation bar includes the Informatica logo, 'Data Governance and Catalog', and a search bar. The 'TT_MDM_Customer' catalog is selected, and the 'Hierarchy' tab is active. The 'Content' section displays a list of assets. A red box highlights the 'TT_MDM_Workspace (7)' project entry. A blue box highlights the 'Person (99)' Business Entity entry. A red arrow points from the 'TT_MDM_Workspace' header in the left screenshot to this entry. A blue arrow points from the 'Person' asset in the left screenshot to this entry.

Name	Type	Description
TT_MDM_Customer (8)	Informatica Intelligent Cloud Services Cata...	
Business360 (1)	Project	-
TT_IDMC_MDM_Reference 360-0clEblcAsrKctaT5e02m... (1)	Reference Catalog Source	-
TT_IDMC_MDM_TT_ORCL_PERSON (1)	Reference Catalog Source	-
TT_IDMC_MDM_TT_SNOWFLAKE_PERSON (1)	Reference Catalog Source	-
TT_IDMC_MDM_TT_SQL_PERSON (1)	Reference Catalog Source	-
TT_MDM_Workspace (7)	Project	-
Customer Oracle (3)	Source System Folder	-
Customer Oracle	Source System	-
Customer SQLServer (3)	Source System Folder	-
Customer SQLServer	Source System	-
Default (3)	Source System Folder	-
Person (75)	Match and Survivorship	-
Person (99)	Business Entity	-
TT_MDM_Workspace_Egress_Publish (1)	Project	-
TT_MDM_Workspace_Ingress (2)	Project	-

Key MDM SaaS Assets and their Catalog View (2/5)

Attributes/fields of a Business Entity

Informatica Business 360 Console

Person | Valid

Model | Data Flow | Consumption

Attributes | Data Quality | Match | Survivorship | Events

Show: Enabled Fields

Basic Fields

- Text
- Integer
- Double

Properties: First Name

General

Status: Enabled Disabled

Data Quality

Search and Reports

Survivorship

Display Name: First Name

Internal ID: firstName

Description:

Maximum Length: 255

Required field

Multiline field

Informatica Data Governance and Catalog

Adaptive

Start typing search term

TT_MDM_Customer / TT_MDM_Workspace /

(Add Business Name)

BUSINESS ENTITY Person

Overview | Contains | Lineage | Relationships | Data Quality | Reference Data | Stakeholder

Data Elements (99)

#	Name	Type
	ElectronicAddress.source record details.source Primary R...	System Field
	ElectronicAddress.Source Record Details.Source System	System Field
	Email Address.Default Indicator	Field
	Email Address.Effective End Date	Field
	Email Address.Effective Start Date	Field
	Email Address.Electronic Address	Field
	Email Address.Electronic Address Status	Field
	Email Address.Enriched Indicator	Field
	Email Address.Hygiene Status	Field
	Email Address.Net Protect Code	Field
	Email Address.Usage Type	Field
	Email Address.Verification Message	Field
	Email Address.Verification Status Code	Field
	First Name	Field
	Full Name	Field
	Gender	Field
	Identification.Identification Type	Field

26 - 50 of 99 Items

Page

Key MDM SaaS Assets and their Catalog View (3/5)

The R360 code list used in the picklist field is cataloged and included in the lineage.

The image displays two side-by-side screenshots from the Informatica Business 360 Console. The left screenshot shows the configuration for a 'Person' model attribute named 'Gender'. The 'Properties: Gender' section is visible, with the 'Reference Data' field set to 'Gender'. A red box highlights the 'Gender' reference data selection, and a red arrow points from this box to the right screenshot. The right screenshot shows the 'Lineage' view for the 'Gender' field. It displays a data flow diagram where 'Enterprise Gender' (highlighted with a red box) is linked to 'Gender' and 'MDM_Scan_hv'. The diagram also shows other data sets like 'Customer Oracle', 'Customer SQLServer', and 'Default' leading to 'Person' entities. The top right of the right screenshot shows the 'Create Data Set' button and various metrics like 'OVERALL RATING' and 'LIFECYCLE'.

Key MDM SaaS Assets and their Catalog View (4/5)

Data Quality rules applied on the fields

The screenshot shows the Informatica Business 360 Console interface. The top navigation bar includes the Informatica logo and 'Business 360 Console'. The main content area is titled 'Person' and 'Valid'. Below this, there are tabs for 'Model', 'Data Flow', and 'Consumption'. Under 'Data Flow', there are sub-tabs for 'Attributes', 'Data Quality', 'Match', 'Survivorship', and 'Events'. The 'Data Quality' tab is active, showing a table of rule associations. A red box highlights two rows in the table:

Rule Association Name	Function Name	Applied Field	Status
PopulatedFullName	Concatenate With Spaces	Full Name	Enabled
NoFutureDob	No Future Date	Birth Date	Enabled
DobBefore1900	Greater Than Date	Birth Date	Enabled

The screenshot shows the Informatica Data Governance and Catalog interface. The top navigation bar includes the Informatica logo and 'Data Governance and Catalog'. The main content area is titled 'Birth Date' and 'DATA QUALITY CALCULATION'. Below this, there are tabs for 'Overview', 'Lineage', 'Relationships', 'Stakeholders', 'Attributes', and 'Tickets'. The 'Overview' tab is active, showing sections for 'Glossaries', 'Data Element Classifications', and 'System Attributes'. A red box highlights the 'System Attributes' section, which contains the following information:

System Attributes (14)

Expression:
RuleUnion(DataQualityRule('DobBefore1900', Birth Date, GREATER_THAN_DATE(start='01/01/1900')), DataQualityRule('NoFutureDob', Birth Date, NO_FUTURE_DATE))

Control conditions:
-

Key MDM SaaS Assets and their Catalog View (5/5)

Survivorship strategy applied to the fields

The image displays two screenshots from the Informatica Business 360 Console. The left screenshot shows the 'Person' model configuration, highlighting the 'Survivorship' strategy applied to the 'First Name' field. The right screenshot shows the 'First Name' field's 'MATCH AND SURVIVORSHIP CALCULATION' details, including a table of source rankings and the specific survivorship expression.

Person Model Configuration (Left Screenshot):

Fields (69)	Rules
<input checked="" type="checkbox"/> Person	Source Ranking (Rank 14)
<input type="checkbox"/> First Name	Inherited
<input type="checkbox"/> Middle Name	Inherited
<input type="checkbox"/> Last Name	Inherited
<input type="checkbox"/> Full Name	Inherited
<input type="checkbox"/> Prefix Name	Inherited
<input type="checkbox"/> suffixName	Inherited
<input type="checkbox"/> Gender	Inherited
<input type="checkbox"/> Birth Date	Inherited
<input type="checkbox"/> Address	Inherited
<input type="checkbox"/> Phone	Inherited
<input type="checkbox"/> Email Address	Inherited
<input type="checkbox"/> Identification	Inherited

Source Ranking Table (Middle Screenshot):

Rank	Source System
1	Default
2	Customer Oracle
3	Customer SQLServer
--	Informatica Customer 360
--	SFDC
--	CRM
--	Salesf
--	ENSFDC
--	MDM
--	ERP
--	Billing
--	Sales

Field Details (Right Screenshot):

First Name
MATCH AND SURVIVORSHIP CALCULATION

Overview | Lineage | Relationships | Stakeholders | Attributes | Tickets | History

Data Element Classifications

Accepted (0) | Declined (0)
Click here to add Classification assets | No declined Classification assets.

System Attributes (14)

Expression:
SourceRanking(Default=firstName, Customer Oracle=firstName, Customer SQLServer=firstName)

Control conditions:

- Person(Candidate Selection Process)[CandidateSelectionCriteria(Field Name=Full Name, Field Type='Person_Name', Key Generation Level='Standard', Candidate Search Level='Typical)]
- Person(Match Process)[(ExactMatch(Field Name=birthDate, Merge Strategy='Automated'), ExactMatch(Field Name=AlternateIdentifier.alternateIdentifierValue, Merge Strategy='Automated'), ExactMatch(Field Name=AlternateIdentifier.alternateIdentifierType, Merge Strategy='Automated', SegmentMatching(Segment Values=('SSN')))]

Calculation Complexity: Constant

Scanning MDM SaaS & Reference 360 assets in CDGC

Dashboard for viewing MDM SaaS Assets in CDGC

Master Data Governance

Master Data Governance

Governance of Master Data key data elements

Shared by: RS

Master Data Governance in CDGC

Master Data Management explained: <https://www.informatica.com/resources/articles/what-is-master-data-management.html>

MDM Source Systems - Data Quality

Group By: Threshold Result

MDM Published Data - DQ Score

Group By: Threshold Result

MDM Technical Assets

Group By: Asset Type

Master Data Systems

Name	Description
Employee_Information_Sys	employee info
MDM - Ingress	Master Data Me
MDM - Egress	Master Data Me
MDM	Master Data Me
TT MDM SYSTEMS	All MDM suppor
TT Customer Data - Published	-

1 - 6 of 6 Items

Published Marketplace Tables

Name	Description
CUSTOMER_EMAIL	-
CUSTOMER_IDENTIFIER	-
CUSTOMER_ADDRESS	-
CUSTOMER	Customers are c
CUSTOMER_PHONE	-

1 - 5 of 5 Items

Master Data Policies

Name	Description
Personally Identifiable Information (PII) Da	There is person
CDE Data Quality Standards - Completeness	This policy iden
Data Format and Standardization Policy fo	This policy esta
Material Definition on Product Category	The second pro
Master Data Change Management Policy	Governs how ch

1 - 5 of 5 Items

Projects in Master Data

Name	Description
BI Analytics Reporting	Reporting projec
Project to Enhance Country Data in EDW	-
CCPA Compliance Project	Identify all syste

1 - 3 of 3 Items

Business Processes Using Master Data

Name	Stakeholders
Master Data Change Process	-
Client Onboarding	Rashmi p, Avani
Order Management	Paul Urban, Reb
Know Your Customer (KYC)	Rebecca South,

1 - 4 of 4 Items

MDM Reference Data sets

Name	Description
infap360ls_PackagelIdentifierType	-
RevenueType	-
SpecialityType	-
infap360ls_ComponentType	-
InsuranceStatus	-
infap360ls_DiseasesSymptomProcedure	-
BankAccountType	-
infap360ls_TimePeriodUom	-
MaritalStatus	-
IdentifierStatus	-
infap360ls_Type	-

1 - 25 of 149 Items View All

Master Data Business Terms

Name	Description
Last Name	A name shared
Personal Email Address	The email add
Postal Code	The postal cod
Email Address	The email add
Address	The particular
First Name	First Name of
Email_address	Email
Credit Card Type	The type of cre
Email	An email addr
Customer Tier	Customers cat
Location Attributes	Physical or me

1 - 18 of 18 Items

Data Sets Governed by MDM Policies

Name	Description
EMP_FINAL_DATA1	-
HR Data - Employee Table	-
Person Entity (MDM)	Person Entity m
MDM - Address - orcl ingress	-
MDM- CUSTOMERS - orcl ingress	-
MDM CUSTOMER - Egress	MDM CUSTOME
TT Customer Record - Published	Published gold

1 - 7 of 7 Items

MDM - Customer Golden Data Lineage

[Data Governance and Catalog | Person | Lineage](#)

Reference Document Links

IICS Scanner : <https://docs.informatica.com/data-governance-and-quality-cloud/metadata-command-center/current-vers...>

Oracle Scanner: <https://docs.informatica.com/data-governance-and-quality-cloud/metadata-command-center/current-vers...>

MS SQL Server: <https://docs.informatica.com/data-governance-and-quality-cloud/metadata-command-center/current-vers...>

Snowflake: <https://docs.informatica.com/data-governance-and-quality-cloud/metadata-command-center/current-vers...>

Business 360 : <https://docs.informatica.com/master-data-management-cloud/business-360-console/current-version.html>

Reference 360: <https://docs.informatica.com/master-data-management-cloud/reference-360-saas/current-version.html>

Thank You